

Connecting**Chemistry**



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## Analyst Round Table 2017



London

Steven Holland, CEO

8 November 2017

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**CONTENT**

**Analyst Round Table 2017**

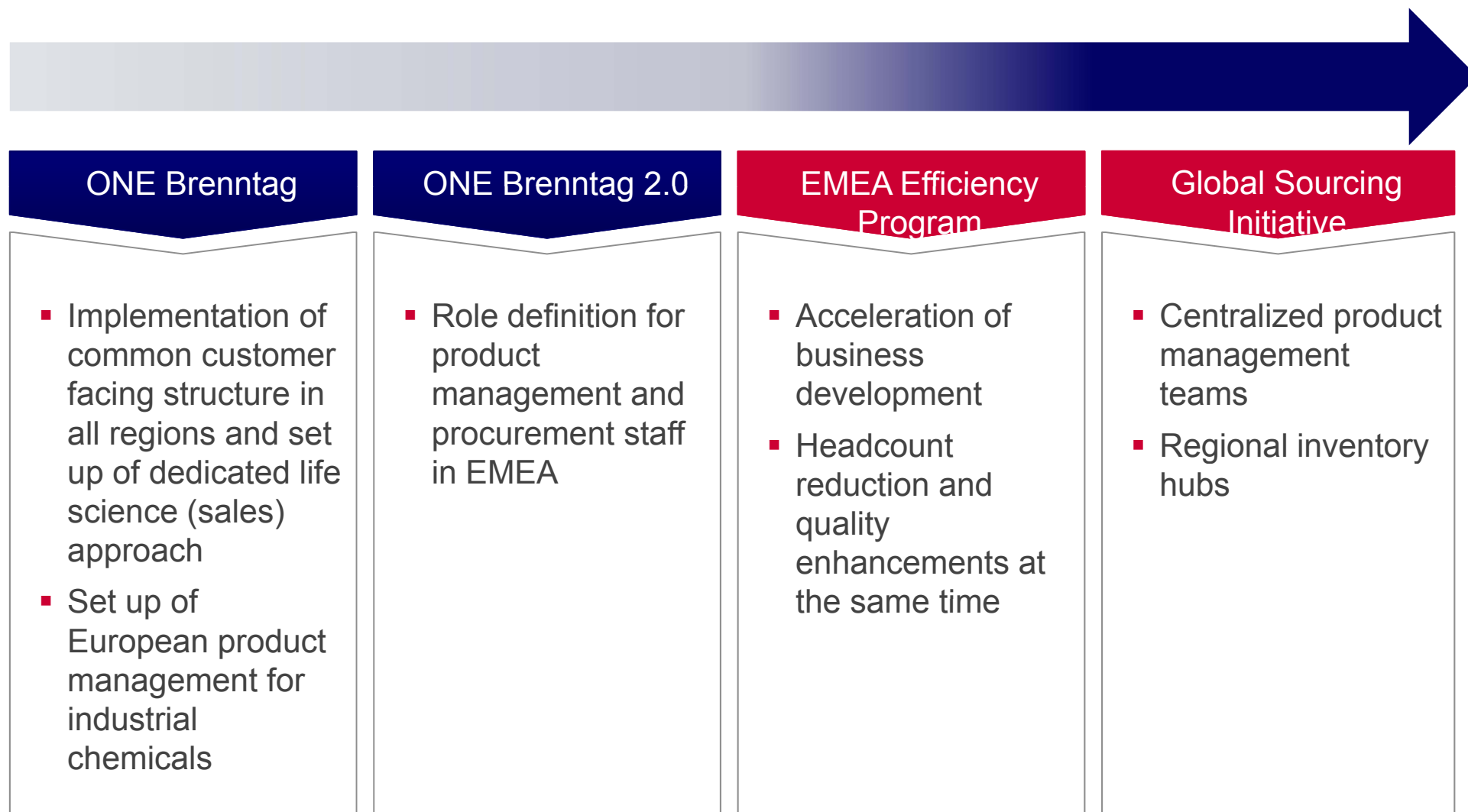
**| EMEA efficiency program**

**| Procurement project – Global Sourcing Initiative**

**| Outlook**

## BRENNTAG INITIATIVES IN EMEA

### Where do we come from



## EMEA EFFICIENCY PROGRAM

### EMEA Efficiency Program – overview

#### EMEA Board of Management

#### Steady monitoring of individual performance of EMEA countries

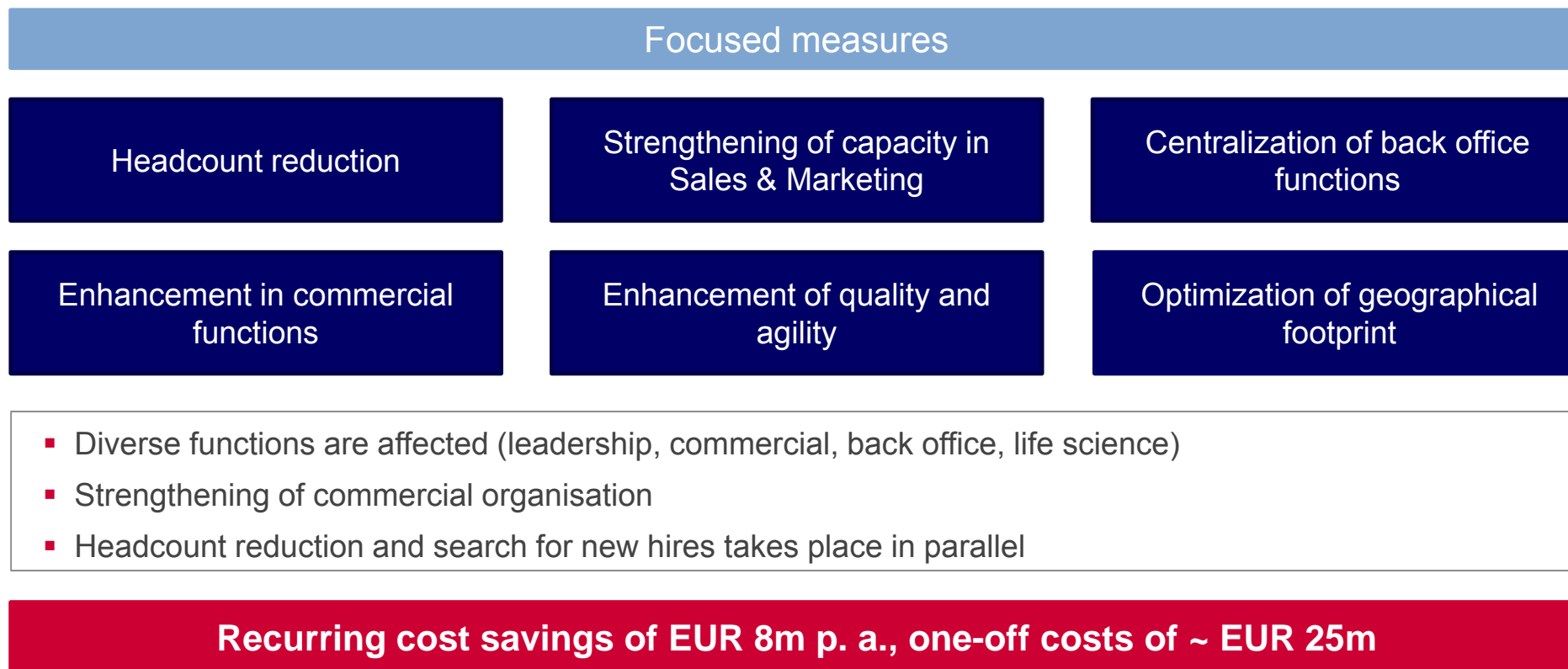
- Monthly result calls with EMEA countries
- Monthly result review meetings with Group CFO
- Quarterly performance review meeting on Group level

#### Coordinated effort to address individual improvements across the EMEA region

- Acceleration of organic gross profit and EBITDA growth
- Improvement of conversion ratio in the mid term
- Headcount reduction, quality enhancements and network optimization

EMEA EFFICIENCY PROGRAM

**EMEA Efficiency Program – overview**



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█ **EMEA efficiency program**

█ **Procurement project – Global Sourcing Initiative**

█ **Outlook**

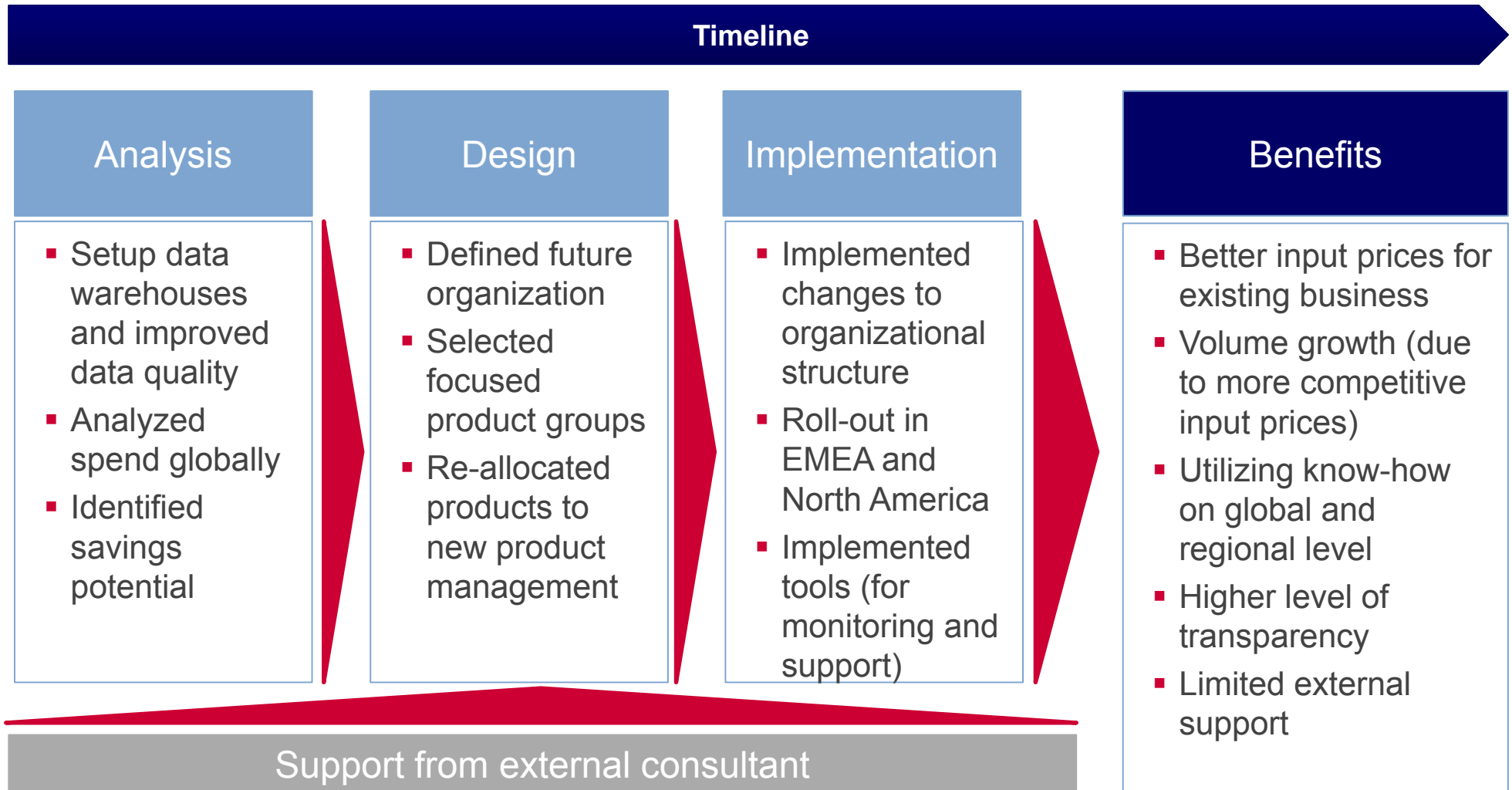
PROCUREMENT PROJECT – GLOBAL SOURCING INITIATIVE  
**Product Management is key to success**

**Brenntag Product Management Approach**

|   |  |   |  |
|---|--|---|--|
|    | <ul style="list-style-type: none"> <li>▪ <b>Centralization of sourcing</b></li> </ul>  |    | <ul style="list-style-type: none"> <li>▪ <b>Decision rights on commercial topics</b> (supplier choice, pricing, sales initiatives, inventory)</li> </ul> |
|   | <ul style="list-style-type: none"> <li>▪ <b>Gross profit responsibility</b> (for product management)</li> </ul>  |   | <ul style="list-style-type: none"> <li>▪ <b>Utilizing cross-border product and market knowledge</b> to support organic growth</li> </ul>                 |
|  | <ul style="list-style-type: none"> <li>▪ Improved <b>supplier management</b> (reduction of number of suppliers, making use of purchasing power)</li> </ul> |  | <ul style="list-style-type: none"> <li>▪ Increased internal transparency utilizes future <b>digitization</b> projects</li> </ul>                         |

PROCUREMENT PROJECT – GLOBAL SOURCING INITIATIVE

**Global Sourcing Initiative: Taking advantage of scale efficiencies**





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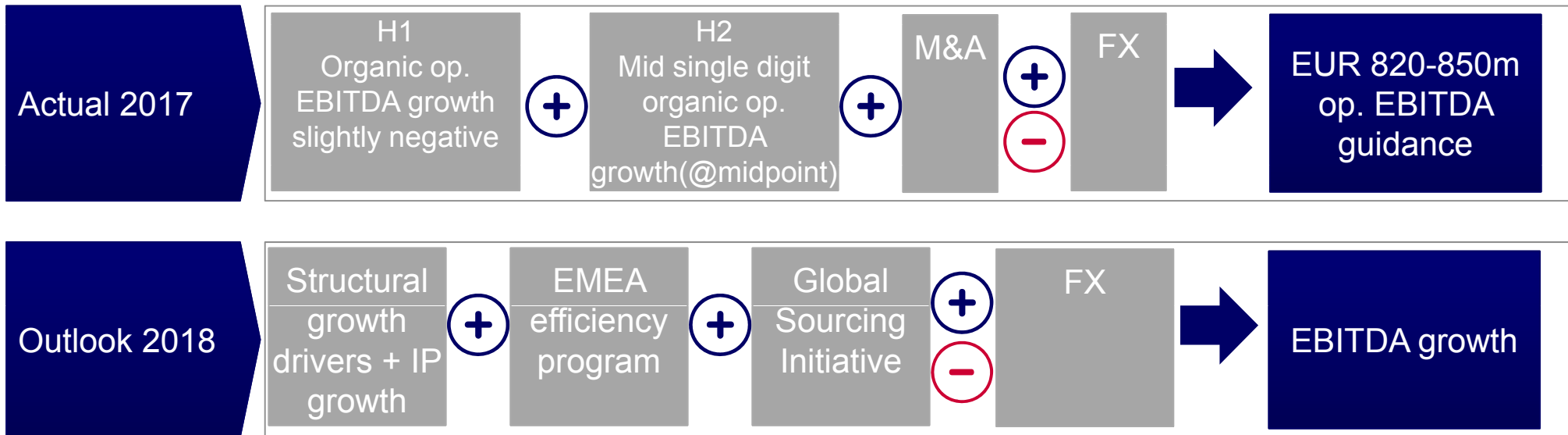
■ **EMEA efficiency program**

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■ **Outlook**

OUTLOOK

**Building blocks for growth of operating EBITDA**



**BRENNTAG**  
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**THANK YOU VERY MUCH FOR YOUR ATTENTION**