

Connecting**Chemistry**



Capital Markets Day 2016



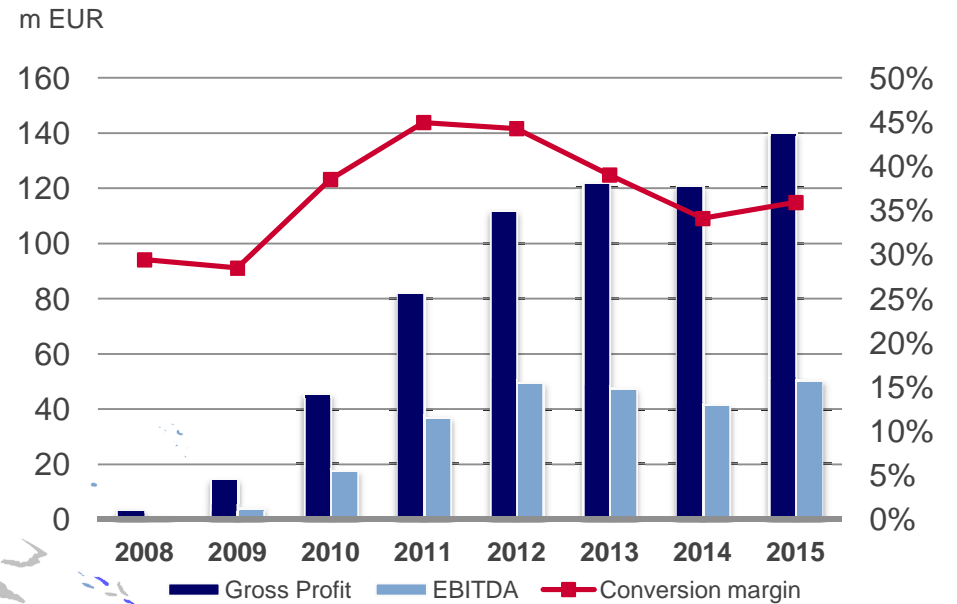
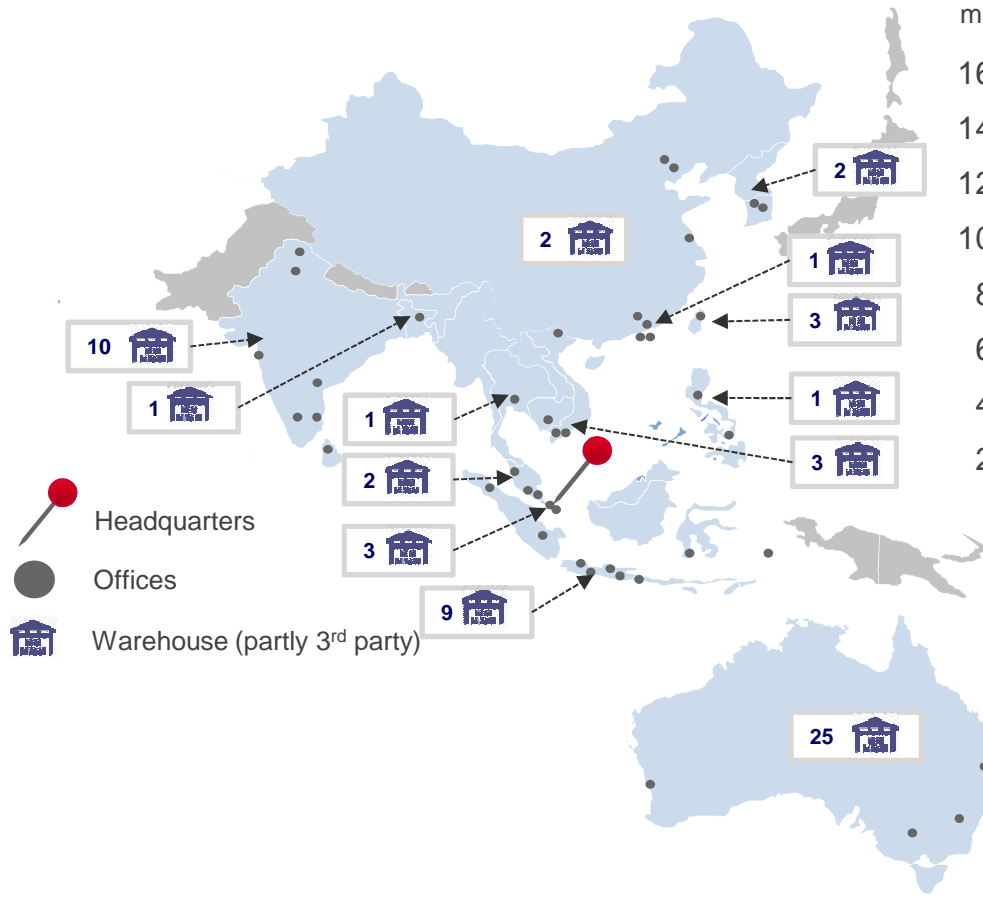
Two Temple Place, London

Region Asia Pacific – Henri Nejade

17 November 2016

INTRODUCTION INTO ASIA PACIFIC

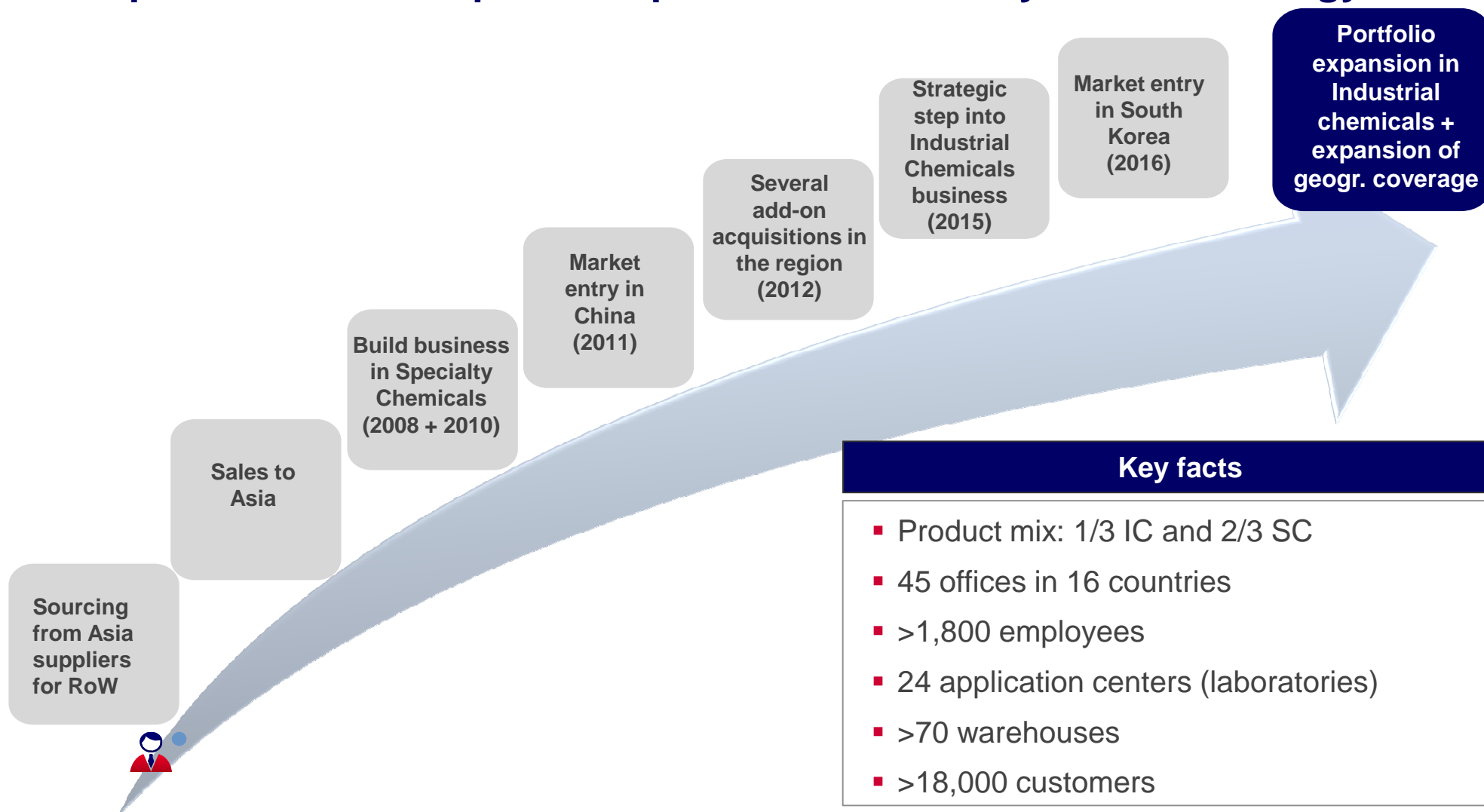
Overview of the region Asia Pacific



Profitable and cash generative region as of today

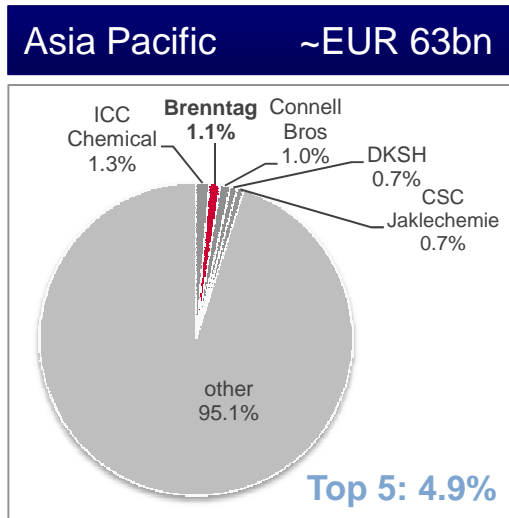
INTRODUCTION INTO ASIA PACIFIC

Implementation of a powerful platform with clearly defined strategy

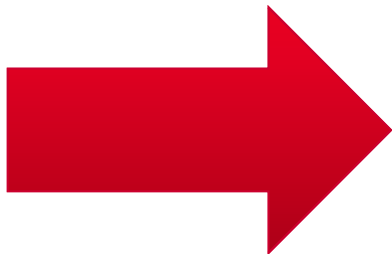


ASIA PACIFIC CHEMICAL DISTRIBUTION MARKET

Asia Pacific is an attractive market offering lots of future opportunities



- Chemical distribution market**
- Market has a significant size and is extremely fragmented
 - Brenntag is the only global player with a dense pan-Asian network
 - Most of the countries are emerging markets
 - Sub-regions like Vietnam, China, Indonesia with highest growth rates to be expected



- Changes in the market over the last years**
- More focus from suppliers on South East Asia
 - More competition from EMEA and North American distributors
 - Compliance becomes more and more important
 - Rising demand for HSE in China

Ongoing market consolidation in favor of large players

STRATEGY IN ASIA PACIFIC

Clearly defined objectives going forward

Become the #1 chemical distributor with a full-line product portfolio in Asia Pacific

Challenges

- Attraction + retention of people and management talent
- HR Selection process
- “Brenntag academy” to be developed further
- Expansion of business with industrial chemicals

Opportunities

- Huge market with growth potential
- Highly fragmented market
- Ongoing consolidation via M&A in selected countries and markets
- Competitive advantage for scale distributors (logistics network, regulation processes etc.)
- Supplier and customer relationships
- Focused industries: food, health & lifestyle, coatings & construction, automotive

Asia Pacific is the region with largest growth potential in the future!