

9M 2016 Key messages



- Proforma 9M sales +6%; EBITDA +14%
- Margins & returns ahead
- Strong cash generation continues ... expect YE net debt/EBITDA of less than 2x
- Guidance reiterated ... FY EBITDA expected to be in excess of €3bn





9M 2016 Financial highlights



	EBITDA margin 11.7%	+170bps	+90bps
	EBITDA €2.4bn	+43%	+14%
	Sales €20.4bn	vs. 2015 +22%	vs. Proformate +6%





9M 2016 trading



- Europe overall positive momentum
- Americas Q3 sales moderately ahead; good profit delivery
- Asia continuation of H1 trends
- Group profit growth across all Divisions

Proforma

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	Sales		EBITDA	
YoY change	H1	9M	H1	9M
Europe	+3%	+4%	+5%	+5%
Americas	+13%	+8%	+39%	+21%
Asia	+4%	+4%	+7%	+7%
Group	+8%	+6%	+20%	+14%



Europe trading



- Overall positive momentum
- Cement volumes slightly ahead
- Pricing environment remains challenging
- Good margin improvement in Lightside
 & Distribution

Proforma

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	Sales		EBITDA	
YoY change	H1	9M	H1	9M
Heavyside	+4%	+5%	+4%	+4%
Lightside	+8%	+7%	+14%	+12%
Distribution	+1%	-	+5%	+5%
Europe	+3%	+4%	+5%	+5%



Americas trading



- Q3 sales moderately ahead; good profit delivery
- Q3 Aggs volumes matching record levels
- Strong operating leverage
- Positive underlying demand continuing for Res, Non-Res & Infrastructure markets

Proforma

	Sales		EBITDA	
YoY change	H1	9M	H1	9M
Materials	+12%	+6%	+69%	+26%
Products	+16%	+12%	+21%	+16%
Distribution	+11%	+8%	+26%	+11%
Americas	+13%	+8%	+39%	+21%



Asia trading



- Philippines market demand continues to advance; cement pricing ahead
- India* volumes ahead; pricing remains challenging
- China* overcapacity continues to impact on performance





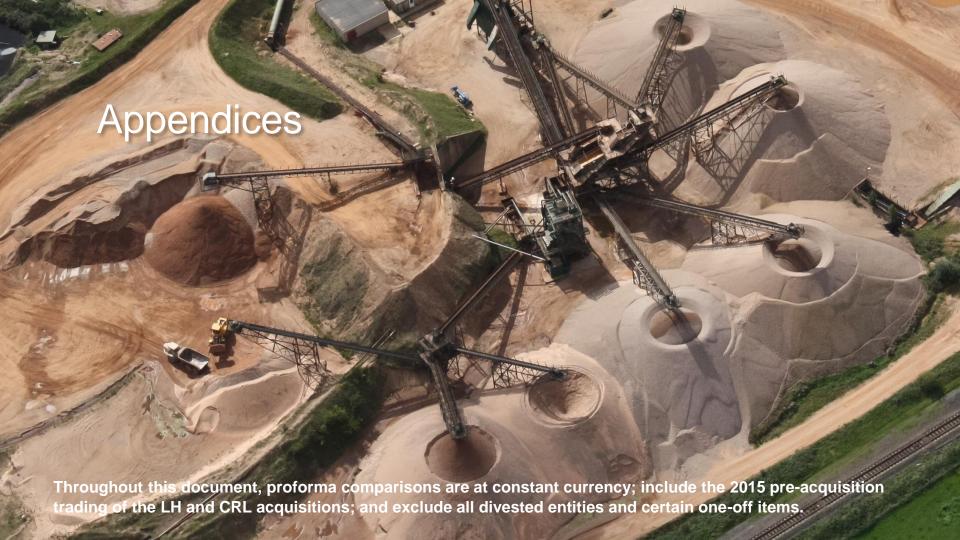
FY 2016 EBITDA expectations



	Europe	Americas	Asia	Group
H1 Proforma EBITDA	+5%	+39%	+7%	+20%
9M Proforma EBITDA	+5%	+21%	+7%	+14%
FY 2016E EBITDA	c.€1.0bn	c.€1.9bn	c.€0.1bn	>€3bn







Cement Volumes & Prices



Proforma¹ YoY % chg

	Volu	Volume		(LC*)
	H1	9M	H1	9M
Finland	+18%	+15%	-2%	-2%
France	+4%	+5%	0%	-1%
Germany	+10%	+12%	-3%	-2%
Hungary	+7%	+2%	-2%	0%
Ireland ²	+15%	+16%	-2%	-3%
Poland	-9%	-14%	-4%	-2%
Romania	-2%	0%	-1%	-1%
Serbia	+16%	+13%	+4%	+5%

Proforma¹ YoY % chg

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	Volume		Price (LC*)	
	H1	9M	H1	9M
Slovakia	-2%	+1%	+2%	+2%
Spain ²	+9%	+9%	-8%	-7%
Switzerland	+5%	+1%	-7%	-7%
Ukraine	+15%	+11%	+18%	+24%
UK	+21%	+10%	-1%	+2%
Canada	+5%	+1%	+1%	+4%
Philippines	+1%	-3%	+3%	+4%
Brazil	-11%	-14%	-9%	-10%

¹ Year on year proforma comparisons include the 2015 trading results of the now integrated LH Assets

^{*} Local Currency



² Domestic volumes – excludes exports

Americas Materials Volumes & Prices



Proforma¹ YoY % chg

	Volume H1 9M		Price	
			H1	9М
Aggregates	+13%	+7%	+3%	+3%
Asphalt	+17%	+6%	-8%	-8%
RMC	+12%	+7%	+4%	+4%

¹ Year on year proforma comparisons include the 2015 trading results of the now integrated LH Assets



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