Interim Management Statement

12th November 2013

2013 Trading and Outlook

Key Points

Q3 EBITDA 3% ahead of 2012

Reiterate guidance of H2 EBITDA in line with 2012

Cost savings ahead of target

Acquisition/Investment spend of €660m on 24 transactions

Detailed portfolio review underway

Improving Trends

L-f-l Sales	Europe	Americas	Group
H1	-10%	-1%	-6%
Q3	-1%	+4%	+2%
Cum 9M	-7%	+1%	-3%

Overall performance:

- Q3 Sales +2% at €5.4Bn; EBITDA €0.66Bn (2012: €0.64Bn)

- Cumulative 9 months Sales -1% at €13.4Bn; EBITDA €1.06Bn (2012: €1.16Bn)

2013 Europe Outlook

EBITDA Indications	Materials	Products	Distribution	Total
2013 Change	c20% decrease	c25% decrease	c25% decrease	20%+ decrease
2012 Actual	€352m	€152m	€217m	€721m

- **Materials:**
  - H1 EBITDA -54%; weak volumes, absence of 2012 one-off gains
  - Q3 cement volume improvement Poland +5%, Ukraine +8%
- **Products:**
  - H1 EBITDA -40%; L-f-l Sales down 8%
  - More stable Q3; L-f-l Sales up 1%
- **Distribution:**
  - H1 EBITDA -31%; L-f-l Sales down 7%
  - Q3 L-f-l Sales decline moderated to 2%

2013 Americas Outlook

EBITDA Indications	Materials	Products	Distribution	Total
2013 Change	Up to 5% increase	c30% increase	Up to 10% increase	c10% increase
2012 Actual	$713m	$262m	$107m	$1.08Bn

- **Materials:**
  - H1 US$ EBITDA -26%; L-f-l vols: Aggs -5%, Asphalt -16%, RMC -5%
  - Improved Q3; L-f-l vols: Aggs +6%, Asphalt and RMC in line with 2012
- **Products:**
  - H1 US$ EBITDA +20%; L-f-l Sales +5%
  - Improved Q3 demand backdrop; L-f-l Sales +10%
- **Distribution:**
  - H1 US$ EBITDA +22%; L-f-l Sales +6%
  - Q3 L-f-l Sales +9%; Margin pressures in Exterior Products

2013 Outlook Non-trading

	Depcn & Amortisation	Profits on Disposal	Share of JV & Associates PAT	Net Finance Costs
2013 Outlook	Slightly lower	c€30m	-10%	-5%
2012 Actual	€730m*	€230m	€62m*	€305m

- **Disposal Profits:** 2012 included €187m divestment profits primarily from Secil/Magnetic

** Excluding Impairment charges*

€0.7Bn Development Activity to end - September

€m	Materials	Products	Distribution	Total
Europe	289	9	25	323
Americas	138	125	9	272
Asia	65	-	-	65
Total	492	134	34	660

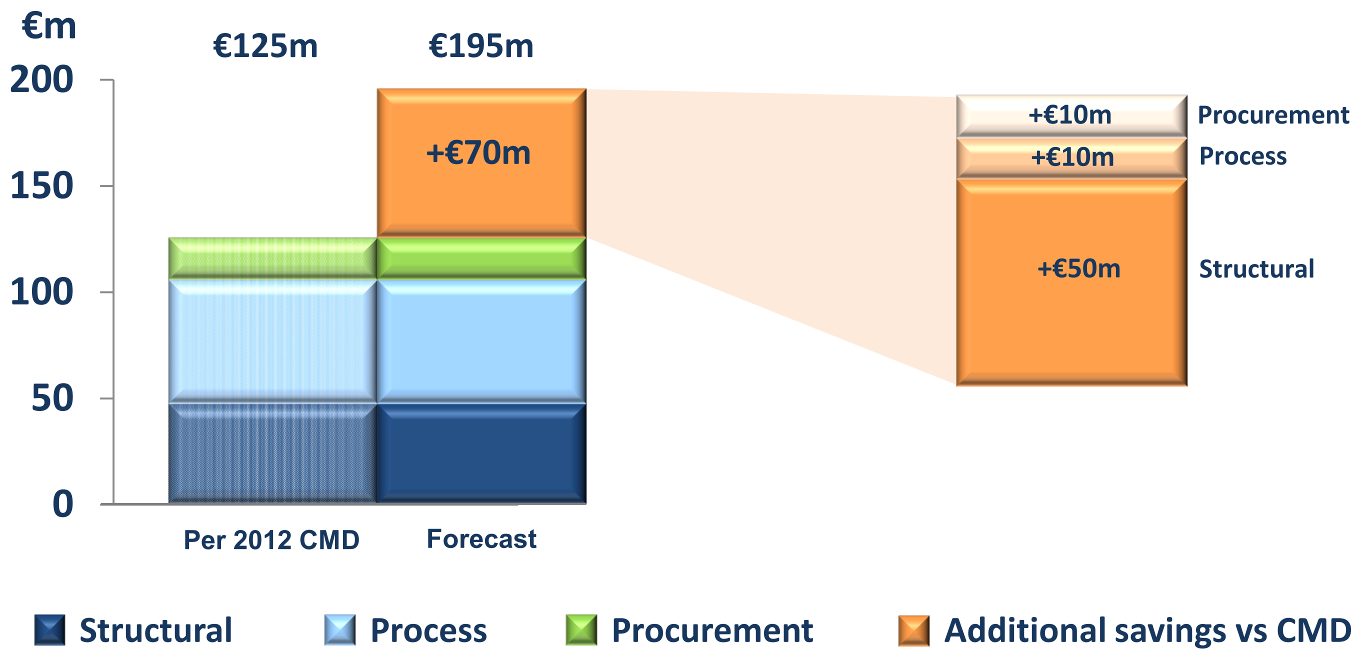
- **Materials:** Cement add-ons in Ukraine, China, India; asset swap in Spain
- **Products:** Strengthening market positions in North America
- **Distribution:** Bolt-ons in Belgium, Netherlands & US Interior Products

Cost Reduction Measures & Portfolio Review

Ongoing Focus on Costs

- Acceleration of ongoing programme in our European operations
- Expect €195m incremental cost savings for 2013; Nov ‘12 CMD target €125m
- 2014-2015 cost savings target maintained at €175m
- Targeted cumulative cost savings increased to c€2.6Bn by end 2015

Increasing 2013 cost savings



€70m higher than CMD projections in 2013…
… primarily driven by additional structural savings in Europe

Portfolio Review

- Changing regional growth dynamics
- Detailed portfolio review underway:
    - To identify businesses with the most attractive future returns
    - To prioritise future capital allocation
- Likely to result in further non-core disposals
- Update with full year 2013 results announcement

Summary

EBITDA Outlook

EBITDA in line with prior guidance

Balance Sheet

Expect year-end net debt/EBITDA at c2.2x

Development

€0.7Bn spend YTD; steady activity flow

Portfolio

Detailed review underway

Continued operational focus; well positioned as markets recover

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