

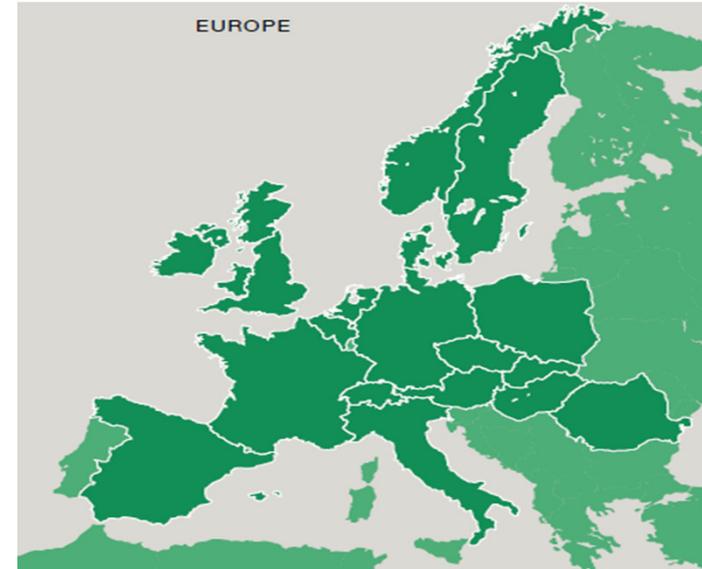
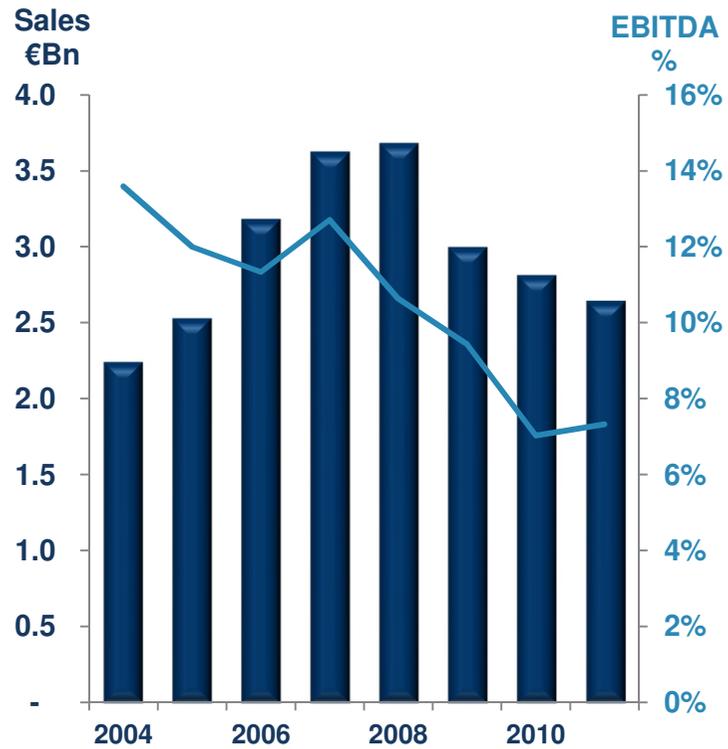


Europe Products Backup Data



Europe Products

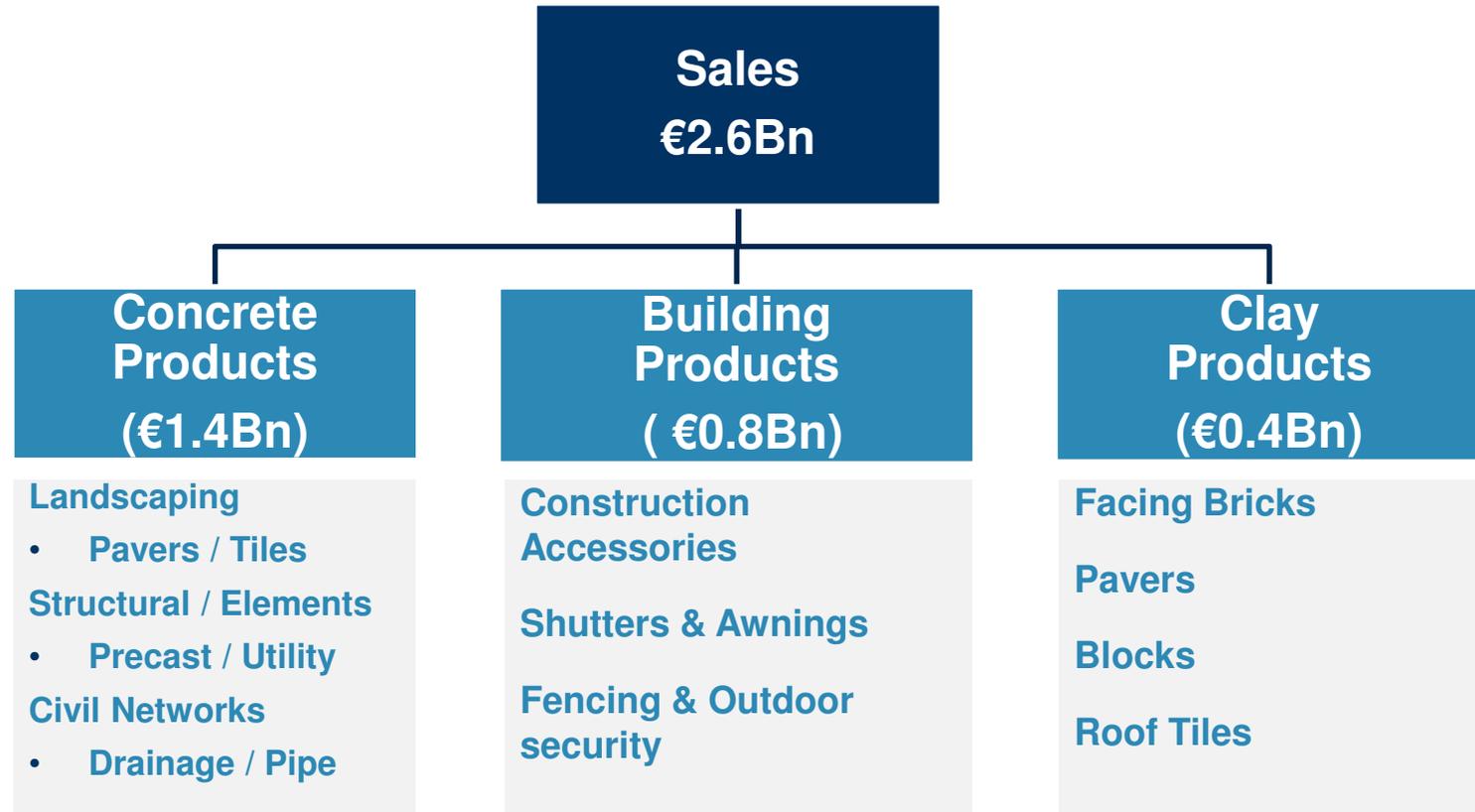
Overview



	2008	2009	2010	2011
EBITDA % Sales	10.6%	9.4%	7.0%	7.3%
Employees ('000's)	21.3	18.4	17.8	16.6

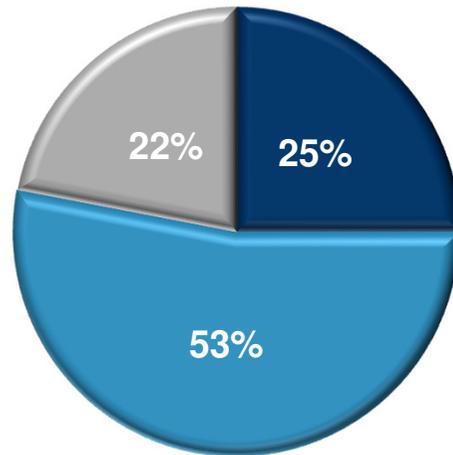


Operating Structure & Key Products

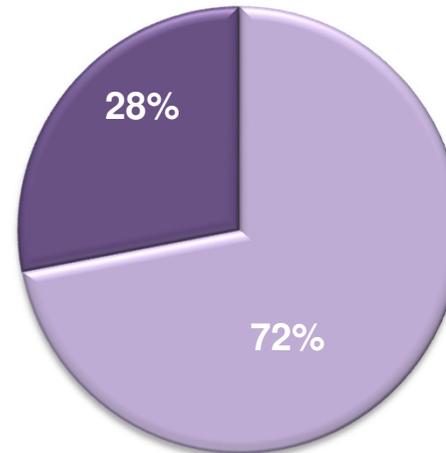


Europe Products

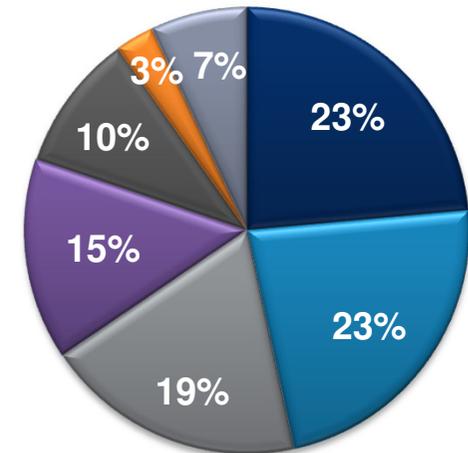
Concrete
End-Use
Markets



- Non-Residential
- Residential
- Infrastructure



- New Build
- RMI



- NL
- FR
- DK
- CEE
- BE
- DE
- CH

... Exposure to different geographies, end uses and products ...



Europe Products

Concrete

	2011 Sales	Countries*
Landscaping 	€0.5Bn	Netherlands, Belgium, Germany, Slovakia, France, Denmark
Structural 	€0.6Bn	Netherlands, Belgium, Denmark, Switzerland, Hungary, Romania, Poland
Civil Networks 	€0.3Bn	France, Netherlands, Belgium, Germany
Total	€1.4Bn	*market leading positions in bold



Concrete Strategy

Organic focus

- Actively rationalising production capacity
- Combining individual co's within larger homogenous businesses
- Focusing on innovation
- Using engineering capabilities to provide solutions for customers

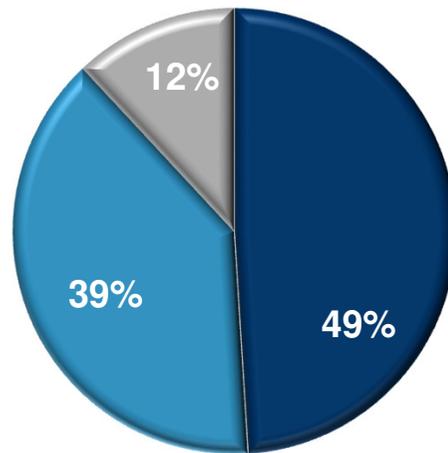
Development focus

- Optimise current market leadership positions
- Selectively expand smaller foot-holds into leadership positions
- Actively manage portfolio
- Increase RMI exposure

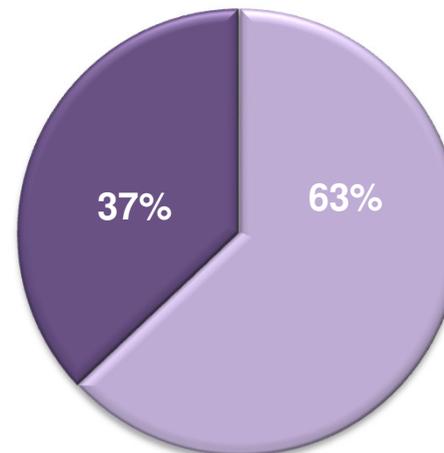


Europe Products

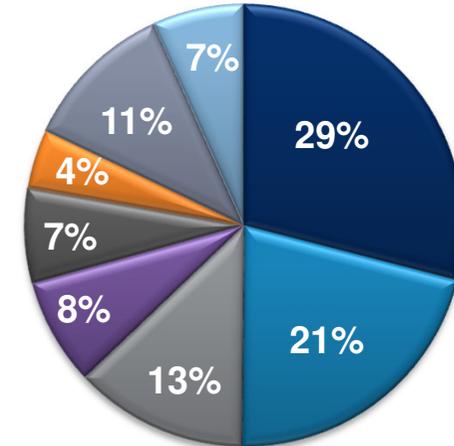
Building Products End-Use Markets



- Non-Residential
- Residential
- Infrastructure



- New Build
- RMI



- DE
- UK
- BE
- RoE
- NL
- FR
- CH
- RoW



Europe Products

Building Products

	2011 Sales	Countries*
Construction Accessories 	€0.4Bn	Pan – Europe, Australasia
Shutters & Awnings 	€0.2Bn	Netherlands, Germany
Fencing / Outdoor Security 	€0.2Bn	Netherlands, UK, Nordic Region, Germany
Total	€0.8Bn	*market leading positions in bold



Building Products Strategy

Organic focus

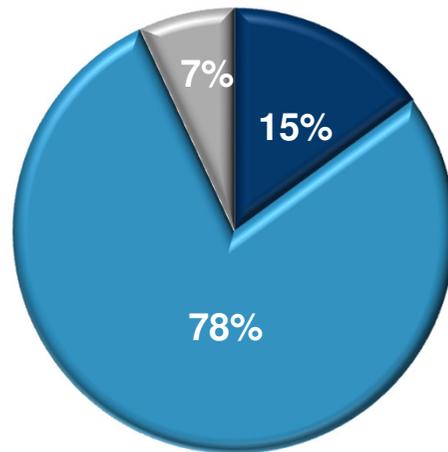
- Optimise production footprint
- Integrate smaller entities into larger operations
- Pursue product innovation

Development focus

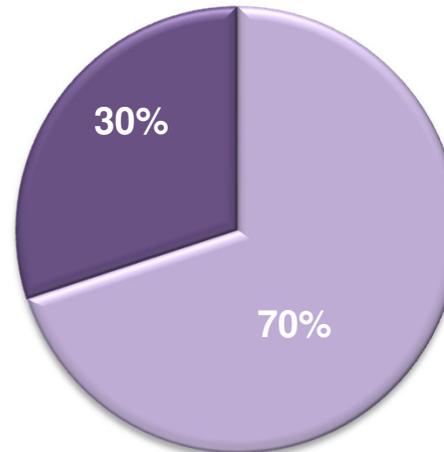
- Construction Accessories: Further expand in Europe and Asia
- Shutters & Awnings: Expand core position in Netherlands, Germany and adjacent countries
- Fencing & Security: Selectively enhance existing positions

Europe Products

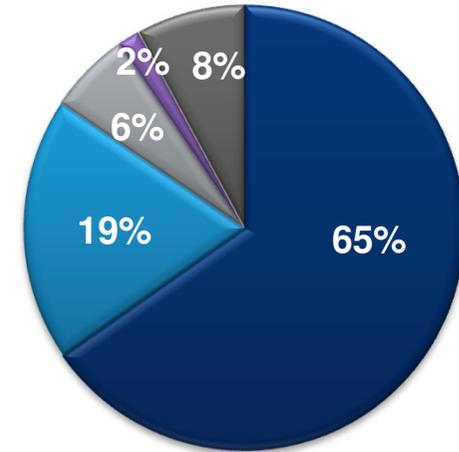
Clay End-Use Markets



- Non-Residential
- Residential
- Infrastructure



- New Build
- RMI



- UK
- NL
- DE
- PL
- BE



Clay

	2011 Sales	Countries*
Brick 	€0.4Bn	UK, Poland, Netherlands
Pavers 		Netherlands
Clay Blocks 		Poland
		*market leading positions in bold



Clay Strategy

Organic focus

- Cost reduction by rationalising production capacity
- Improving production and energy use efficiencies
- Innovation in developing new trend setting products / services

Development focus

- Maintain leadership positions
- Invest for energy efficiencies
- Actively manage portfolio