

A composite image featuring a globe of the Earth. The top of the globe is replaced by a modern city skyline with various skyscrapers. A white airplane is flying in the blue sky above the city, leaving a white contrail. A vibrant rainbow is visible over the ocean on the right side of the globe. The background is a deep blue sky with some clouds and a bright sun in the upper left corner.

**Perstorp
creates your world
for a more
sustainable future**

**GS EMEA Leveraged Finance Conference
London
September 2016**

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Today's Presenters



Jan Secher

President and CEO

- ➔ Joined Perstorp in September 2013
- ➔ Previously CEO and President of Ferrostaal AG, Clariant AG and SICPA, operating partner at Apollo management and 20 years with ABB in international executive positions
- ➔ MSc in Industrial Engineering from University of Linköping, Sweden



Magnus Heimburg

CFO

- ➔ Joined Perstorp in December 2014
- ➔ Previously CFO in Preem AB as well as several other international senior management positions in listed companies
- ➔ BSc in Business Administration from the University of Lund, Sweden

Table of Contents

Perstorp Overview

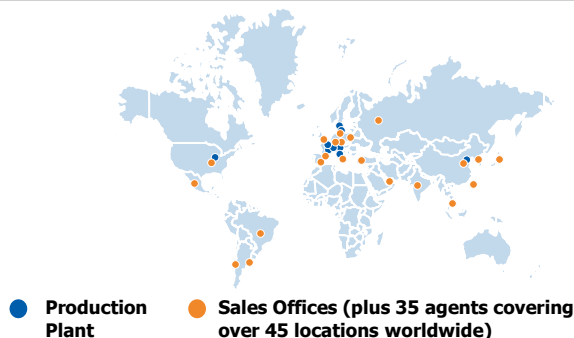
Financial Performance

Q&A

Perstorp Overview

A Global Chemicals Leader in Attractive Markets and Segments

Global Locations



% of Q2 2016 LTM Net Sales unless otherwise stated

EMEA (62%)		Americas (21%)		APAC (17%)	Geography
Transportation (25%)	Consumer products (25%)	Construction (25%)	Industrial (19%)	Animal health (7%)	End-Markets
Coatings (34%)	Plastic Materials (16%)	Synthetic Lubricants (7%)	Feed (6%)	Fuels (14%)	Market Segments¹

- ➔ Vertically integrated, global chemicals producer with leading market positions
- ➔ Focus on high-growth niches within market segments
- ➔ Focus on aldehyde and hydroformylation chemistry
- ➔ Production flexibility along three core platforms
- ➔ Innovation and technological expertise in the Company DNA
- ➔ 10 production sites in 9 countries across Europe, Asia and North America
- ➔ Strong financial performance (Q2 2016 LTM)
 - ➔ Reported EBITDA of SEK 1,556m²
 - ➔ FCF (pre strategic capex)³ of SEK 1,214m (78% FCF conversion⁴)

Q2 2016 LTM

Specialties & Solutions	Advanced Chemicals & Derivatives	BioProducts	Business Areas
Capa, Speciality Polyols, Charmor, Feed & Food	Oxo, Penta, TMP, Neo, Formates, Emoltene 100	Verdis Polaris	Key Products
39.3%	63.7%	0.0%	% of EBITDA
25.1%	14.7%	0.0%	EBITDA Margin
Value-added model Bespoke products, applications, solutions and know-how	Streamlined model Reliable and cost effective supplier of high quality, advanced products	Premium contract model Scandinavia branded, mix of cost-plus and long-term contracts	

¹ In addition, other Market Segments represent 23% of Group Net Sales.

² Reported EBITDA excluding non-recurring items.

³ FCF (pre strategic capex) defined as reported EBITDA excluding non-recurring items less maintenance capex less change in working capital.

⁴ FCF conversion is defined as (reported EBITDA excl. non-recurring items – maintenance capex – change in working capital) divided by reported EBITDA excl. non-recurring items.

Perstorp is Big Where it is Focused: Value-Add to High Growth Niches

...shatter-proof high-rise windows and car windshields



...laminating adhesives for flexible packaging



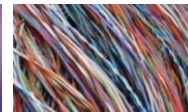
...scratch-resistant coatings for large displays



...durable appliance surfaces



...plasticizer for durable applications



...new generation plasticizer for sensitive applications



Focus on products which provide essential properties for a wide array of end-market products



Transforming basic materials into high value products leveraging Perstorp's flexible and integrated model

Base chemicals



Olefins



Vegetable oil

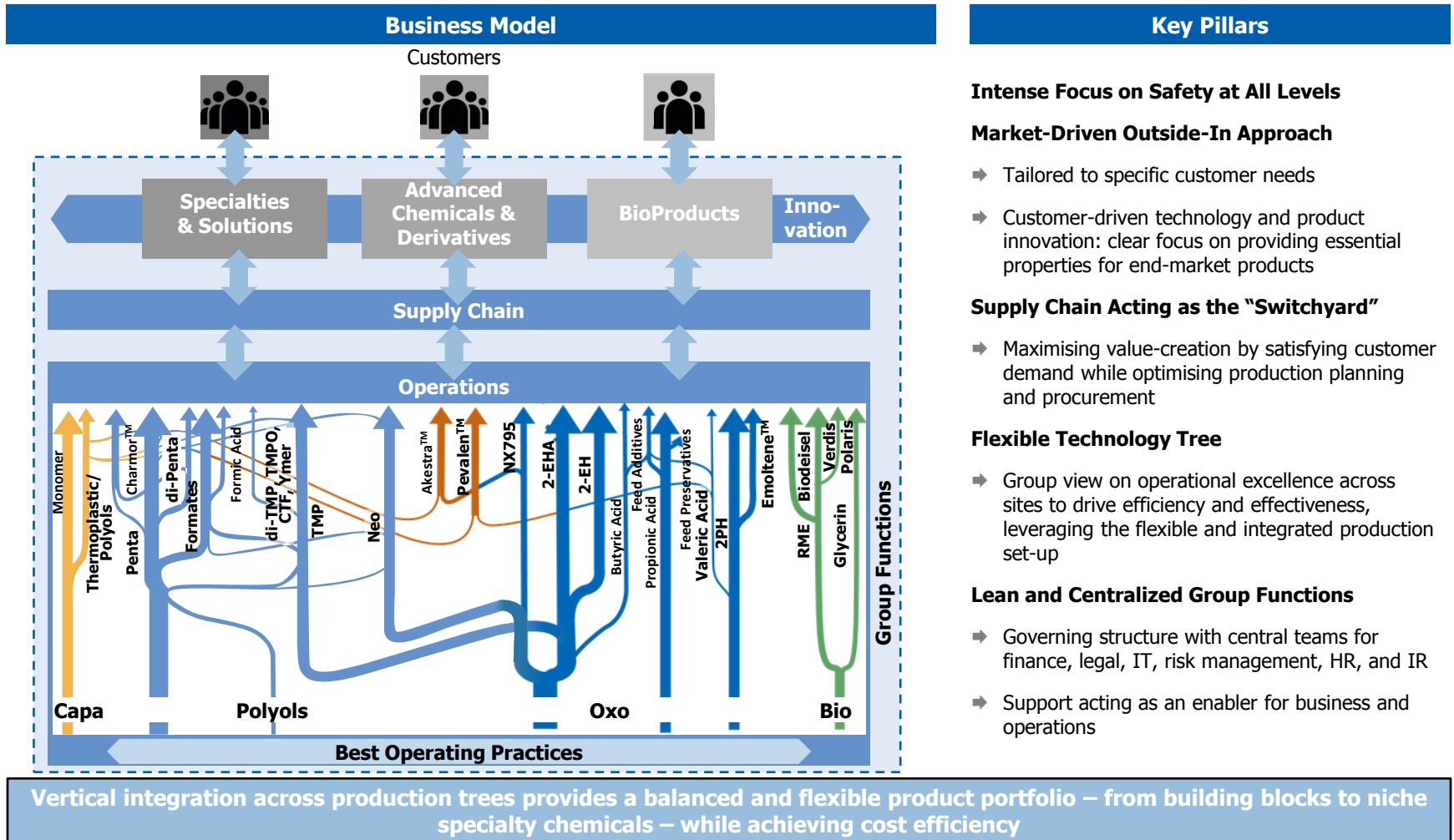


- ➔ Production in the order of kilotonnes
- ➔ Many customers and products
- ➔ Significant market share in selected niches



















- ➔ Production in the order of millions of tonnes
- ➔ Few customers and products
- ➔ Large outlets

Our products enable key properties in a broad range of products across attractive, growing market segments and end-markets

Outside-In, Market-Driven Business Model, Leveraging Perstorp's Technology Tree



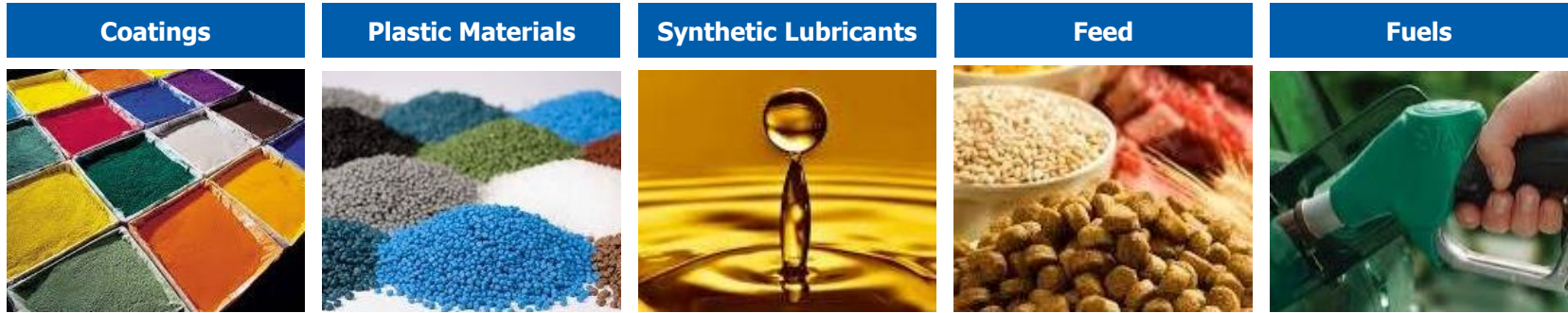
Perstorp is a Global Leader In Highly Consolidated Markets

Product	Perstorp's Global Market Position ^{1,2}	Top 3 Market Share ¹	Perstorp Relative Market Share ^{1,2,3}	Key Competitors
Capa	#1	c.100%	3.0x	 
SPPO	#1 ⁴	c.90% ⁵	NA	 
Penta	#1	>50% ⁶	1.9x	 
TMP	#1	>70%	1.5x	 
Formates	#1 ⁶	c.33%	c.1.1x	 
Neo	#2	c.70%	0.6x	 
Oxo ⁸	#3/#1	c.70% ⁸	0.65x ⁷ /1.4x	  
BioProducts	#2 ⁹	>65%	0.6x	  

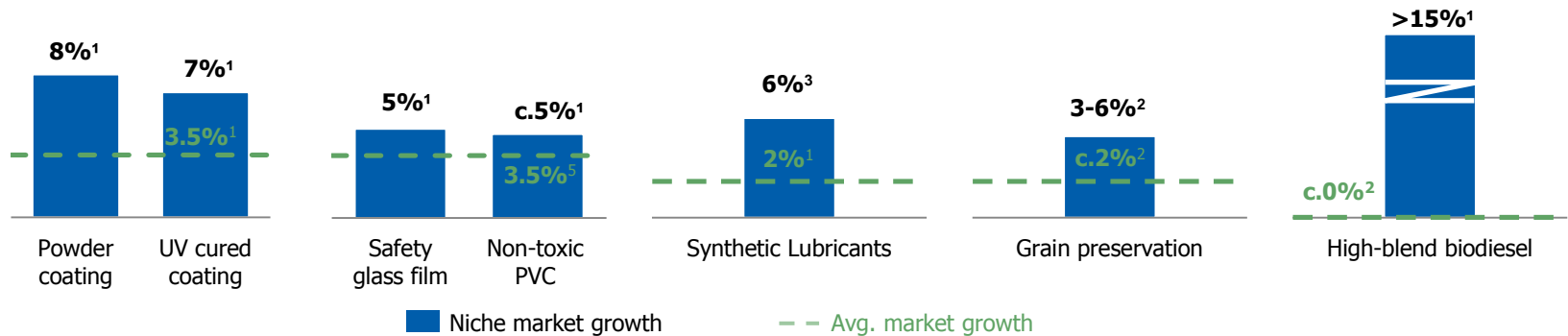
Strong market position with c.80% of sales coming from products where Perstorp holds a #1-3 positions

¹ Based on data for year ended 31 December 2014 unless otherwise stated; Market share for top 3, unless otherwise stated; ² Based on installed capacity; ³ Relative to largest competitor; ⁴ Perstorp largest producer in several SPPO product segments, including alkoxyates and di-TMP; ⁵ In some SPPO product segments, Perstorp is the sole significant player; ⁶ Perstorp is #1 in PoFo and SoFo; ⁷ No. 3 in Europe for the overall Oxo market, No. 1 worldwide for 2-EHA; ⁸ Relates both to European Oxo, and 2-EHA; ⁹ Swedish market only; ¹⁰ Market share for top 4 producers.

Perstorp Targets High-Growth Niches With Above-Market Growth Rates



Industry Versus Niche Market Growth (Estimates, Selected Niches)



- Drivers**
- ➔ Reduced solvent emissions
 - ➔ Improved durability
 - ➔ Building standards requiring safety glass
 - ➔ Ban on lead stabilisers, bromine flame retardants and reduced use of phthalate plasticizers
 - ➔ Growth in air traffic
 - ➔ Ozone-friendly and low GWP refrigerants
 - ➔ Long service intervals for compressor, gear box oils, grease
 - ➔ Fire-resistance for hydraulic, transformer oils
 - ➔ Higher demand for food, especially meat
 - ➔ Ban on antibiotic growth promoters in EU and US (from 2016)
 - ➔ Carbon emission reduction
 - ➔ Hydrocarbon independence
 - ➔ Agricultural policy

Note: Data refers to 2014, with growth figures from 2014-2019.

¹ Volume Growth. Feed market based on animal feed additives; ² Swedish Energy Agency; ³ Value Growth.

Key Events of the Recent Past Demonstrating the Ongoing Transformation from Good to GREAT

1 Strengthened Leadership

- ➔ Selected **strengthening of the management team** over the last three years
- ➔ Strong focus on enhancing our skill sets in marketing, supply chain and procurement to drive the transformation

2 Internal Transformation

- ➔ Early 2014 organisational changes kick-started a **transformation into a market-driven company**
- ➔ Renewed **focus on core strengths** and a new business and organisational model improved the ability to serve customers and execute on the existing strategy
- ➔ Divestiture of non-core assets
- ➔ Pricing excellence initiative
- ➔ **Impact already visible in margins**

3 Growth Investment Executed

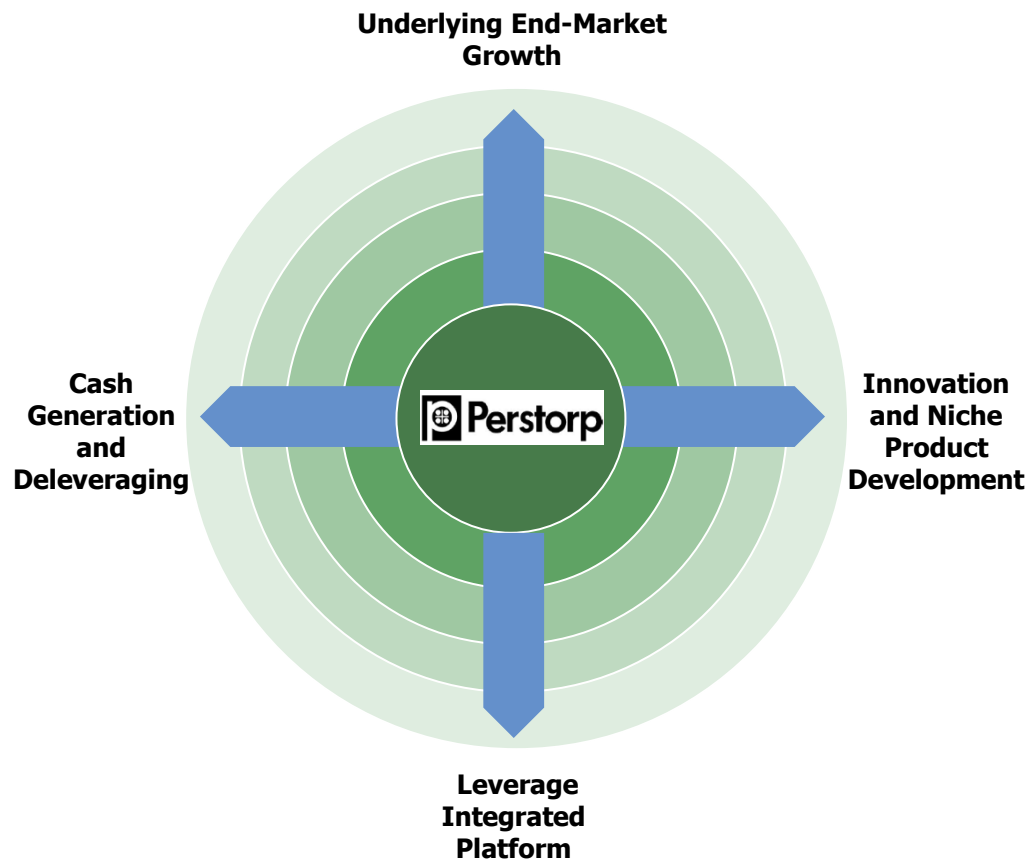
- ➔ Successful **completion of SEK 2bn+ strategic capex** program over 2010-2015
- ➔ **Valerox delivered ahead of schedule and below budget, production from January 2015**
 - Margin enhancement since Q1 2015 as capacity started ramping up
 - Creation of a new leg of future development (Valeraldehyde platform)
- ➔ **Reduction in strategic capex over coming years**

4 Step-Change in EBITDA and Cash Flows

- ➔ Strong EBITDA margin growth track-record with **Q2 2016 EBITDA margin of 16.1%**¹
- ➔ **Further growth expected** as the executed investments and performance initiatives deliver
- ➔ After a period of significant strategic capex, **return to historically achieved cash generation levels**

¹ Based on EBITDA excluding non-recurring items.

The Way Forward: Strategy Focused on Cash Generative Growth

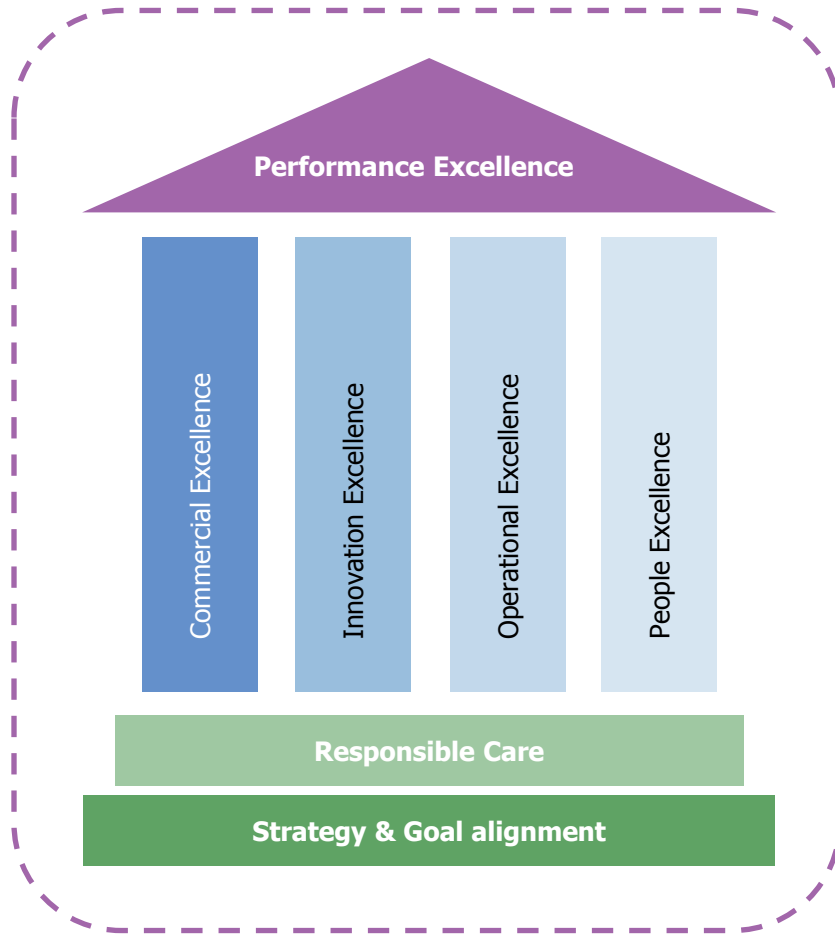


Strategy

- A Underlying End-Market Growth**
 - ➔ Exploit above-GDP growth of selected niches driven by, and capitalizing on macro-trends and our strong market positions
- B Innovation and Niche Product Development**
 - ➔ Drive technology development to further derivitize the product tree
 - ➔ Pursue niche-focused product innovation, meeting real end-market product requirements
- C Leverage Integrated Platform**
 - ➔ Maximize value along the product chains
 - ➔ Debottleneck and expand
- D Cash Generation and Deleveraging**
 - ➔ Reduce leverage through liquidity and cash flow management
 - ➔ Reduction in strategic capex expenditures

Focus on Continuous Improvement Across the Organization

Perstorp Performance System ("PPS") Pillars



- 1 Strategy & Goal alignment**
 - Aligning all resources to work with what is most important for long-term success
 - Business environment analysis and identification of opportunities
- 2 Responsible Care**
 - Conducting all business activities in a safe manner, having improved environmental and social impacts
 - Focus on safety, sustainability, product stewardship and occupational health
- 3 Commercial Excellence**
 - Selling the right products to the right customers, with the right resources and with effective pricing
- 4 Innovation Excellence**
 - Enabling new ideas and solutions for profitable growth
 - New ideas, new products, new application for existing products
- 5 Operational Excellence**
 - Stable processes and efficient flow of material from suppliers, through sites, to customers to be successful in efforts to achieve excellence
- 6 People Excellence**
 - Well trained and motivated people, driving a culture of continuous improvement to be successful in Perstorp's efforts to achieve excellence

Key Credit Highlights



1 Market leadership in consolidated niche markets with high barriers to entry

2 We serve a broad range of attractive market segments with focus on high growth niches

3 Long-standing, stable customer relationships based on our global scale, high quality products, innovation, reliability and strong market reputation

4 Market-driven innovation and strong technical expertise driving commercial impact

5 Highly efficient, flexible production platforms centered around integrated product trees

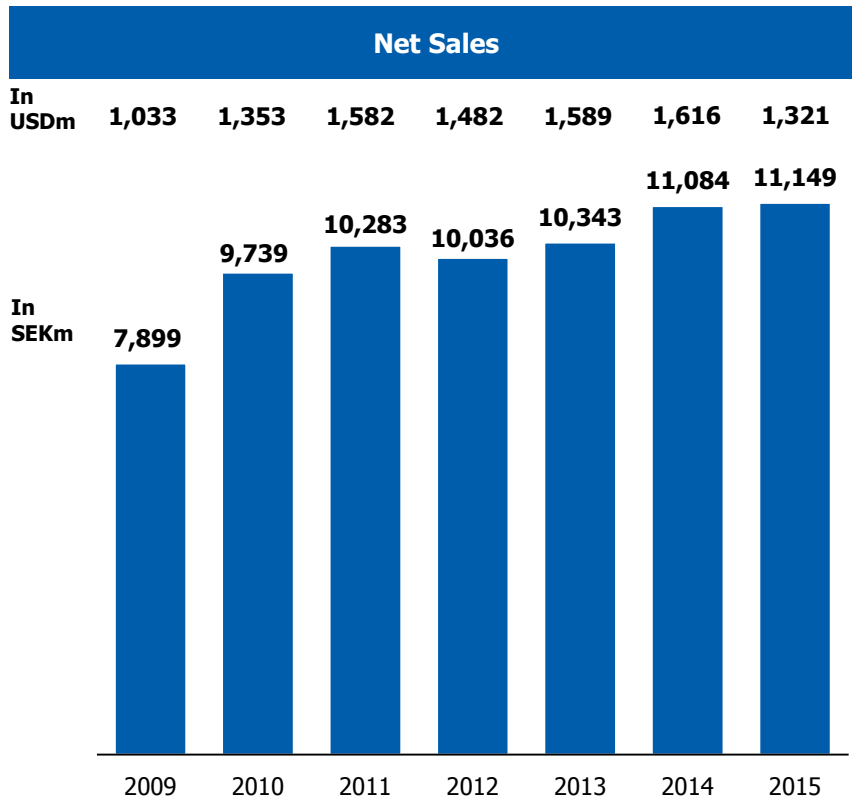
6 Robust EBITDA development and improving cash flow generation

7 Experienced management team with demonstrated ability to take decisive action and clear commitment to deliver

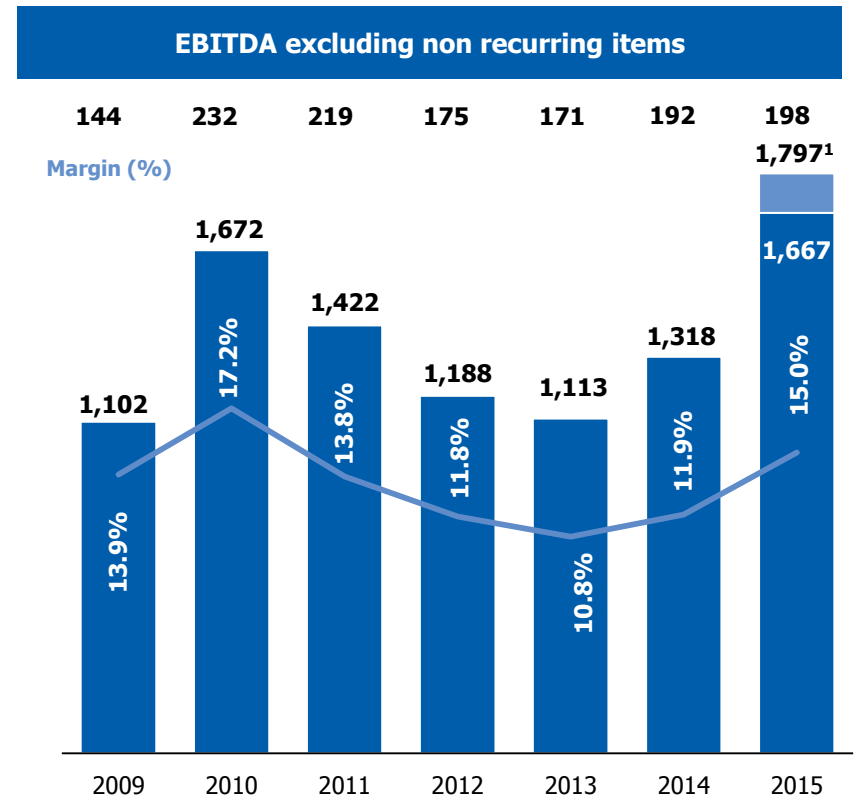


Financial Performance

Historical Financial Performance



- ➔ Robust volume recovery following impact of economic slowdown in 2009



- ➔ 2010 exceptionally strong primarily due to favourable contribution ratio in combination with a sharp volume recovery from 2009
- ➔ Margins in 2011-2013 have eroded following a competitive market environment and negative FX effects
- ➔ Strong performance in 2014-2015 driven by improved market conditions, successful margin management and favourable currency effects

Note: Conversion from SEK to USD have been made at actual average rates for the period.

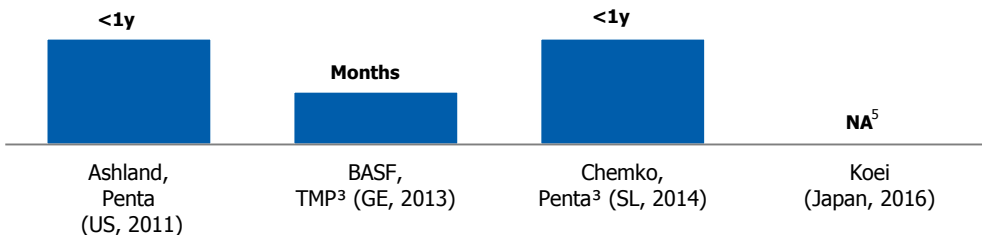
¹ Adjusted for the Stenungsund shutdown.

Successful Completion of Strategic Projects...

Overview of Key Strategic Projects

	Capa (€60m)	Neo China (€15m)	Valerox (€115m)
Completed	→ 2011	→ Q3/13	→ Start-up in Jan-2015 → 2nd reactor added end-2015 ¹
Description	→ Doubling our capacity on Caprolactones in Warrington, UK	→ A new Neo plant in Zibo, China	→ Complementing our Oxo platform with a new series of products
Strategic Rationale	→ Support market growth → Reinforce our #1 position in the market → Increasing our share of specialities	→ Fast growing market → Strengthen our market position → Chinese footprint	→ Attractive payback → Provides customers with a REACH ² compliant product → Higher profitability due to advantageous raw material position

Overview of Short Pay-Back Acquisitions⁴ (years)



Commentary

- Successful **completion of SEK 2bn+ strategic capex** program over 2010-2015
- **Valerox delivered ahead of schedule and below budget, production from January 2015**
 - Margin enhancement since Q1 2015 as capacity started ramping up
- After a period of significant strategic capex, **return to historically achieved cash generation levels**

Source: Company information

¹ Increased Valerolactone capacity by c. 50%.

² REACH stands for the Regulation on Registration, Evaluation, Authorisation and Restriction of Chemicals and entered into force on 1-Jun-2007 as an update to the EU legislative framework on chemicals.

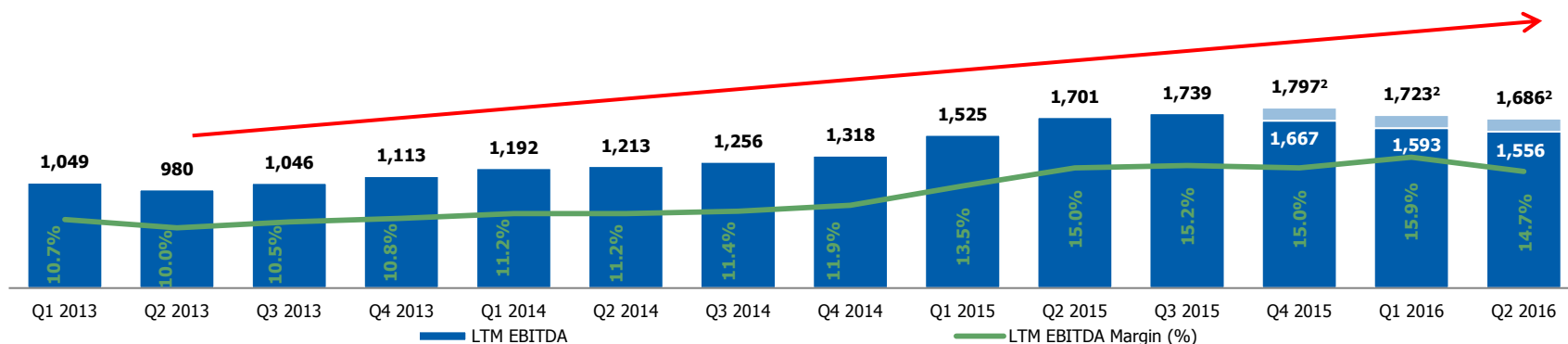
³ Investment related to the acquisition of a business activity discontinued by BASF, in partnership with the latter. Chemko acquisition relates to the Penta and calcium formate businesses from Chemko.

⁴ Pay-back years calculated with respect to EBITDA; Management estimate.

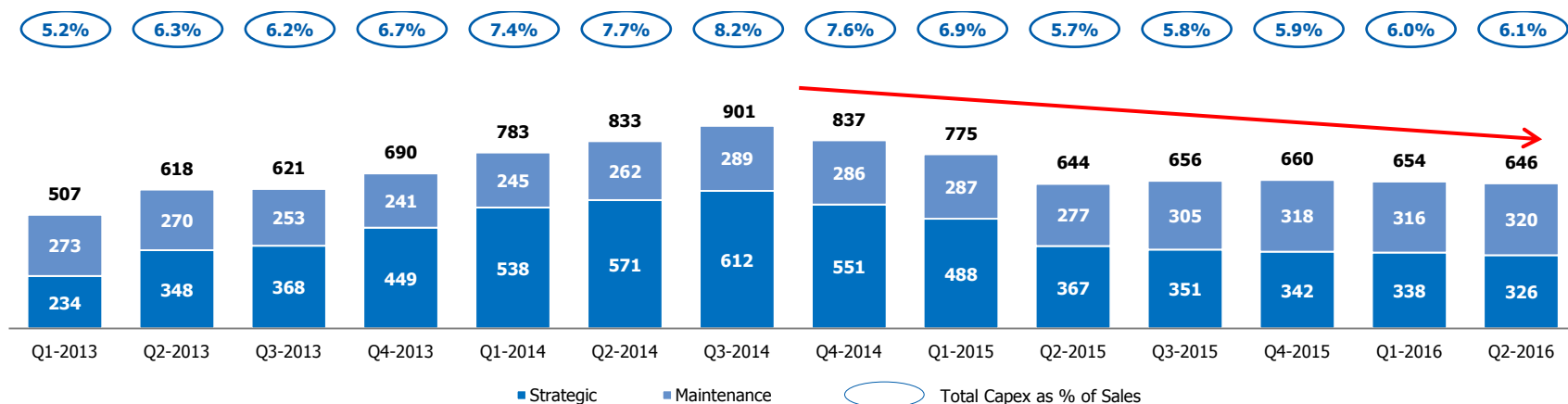
⁵ The transaction was signed in 2016 and payback has not been achieved yet.

...Drives Step Change in EBITDA Growth

LTM EBITDA Evolution (SEKm)¹



LTM Capex Profile (SEKm) and Total Capex as % of Sales



¹ EBITDA excludes non-recurring items.

² Adjusted for the Stenungsund shutdown.

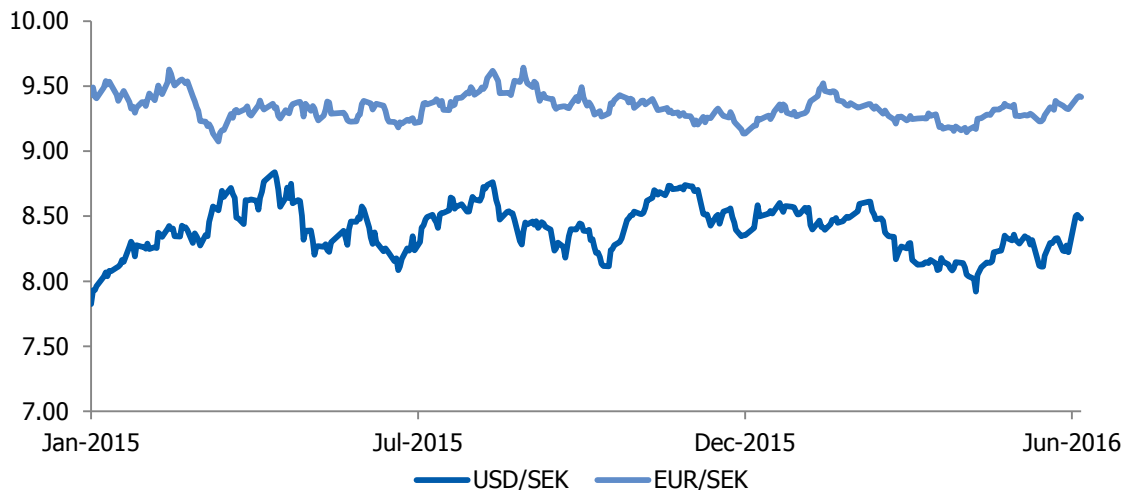
Cash Flow Generation

Free Cash Flow								Comments
	2009	2010	2011	2012	2013	2014	2015	
EBITDA excl. non recurring	1,102	1,672	1,422	1,188	1,113	1,318	1,667	→ EBITDA excl. non recurring items increasing after a couple of years of lower earnings
Change in working capital	144	8	(76)	(82)	(151)	720	120	→ Moderate maintenance capex requirements
Maintenance capex	(184)	(231)	(150)	(276)	(241)	(286)	(318)	→ Expansive strategic capex in 2013 and 2014 to enable step change in earnings
Free Cash Flow (before strategic capex)	1,062	1,449	1,196	830	721	1,752	1,469	→ Active working capital management including an off-balance sheet trade receivables financing program, with effect from Q2/2014
<i>% of Adjusted EBITDA</i>	96%	87%	84%	70%	65%	133%	88%	→ Cash flow conversion before strategic capex historically between 65% and 100%
Strategic capex	(187)	(270)	(214)	(214)	(449)	(551)	(342)	
Free Cash Flow	875	1,179	982	616	272	1,201	1,127	
<i>% of Adjusted EBITDA</i>	79%	71%	69%	55%	24%	91%	68%	

Note: 2009-2011 based on simplified Free cash flow calculation for illustrative purposes (Fx effects are included in the change in working capital; which is a difference from the official quarterly reports where it is excluded)

Impact of Foreign Exchange Rates

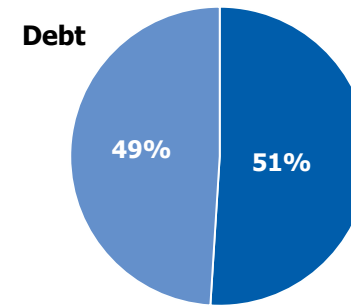
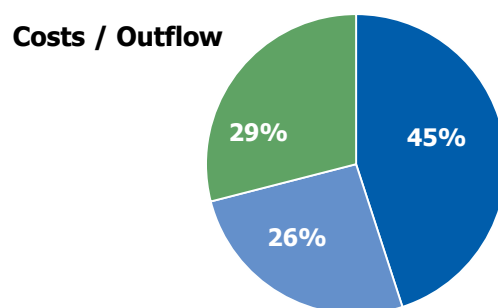
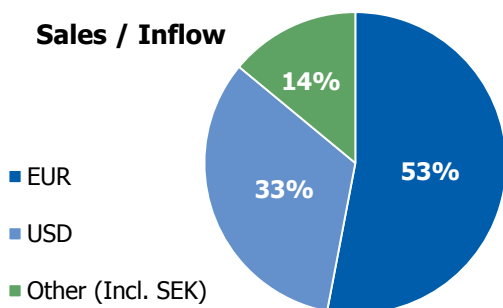
Historical FX Rates



Commentary

- ➔ A 1% weaker SEK will have a positive effect on EBITDA on a yearly basis of:
 - USD/SEK = SEK 11m
 - EUR/SEK = SEK 15m
- ➔ A 1% change in SEK will have the following effect on debt:
 - USD/SEK = SEK 64m
 - EUR/SEK = SEK 61m

Sales, Costs and Debt Split by Currency (LTM Q2 2016)



EUR and USD debt denomination of cash flows and debt provides a natural hedge, therefore limited currency movement effect on leverage

Note: All financials shown in SEKm
 Sources: Riksbanken, Perstorp internal estimates

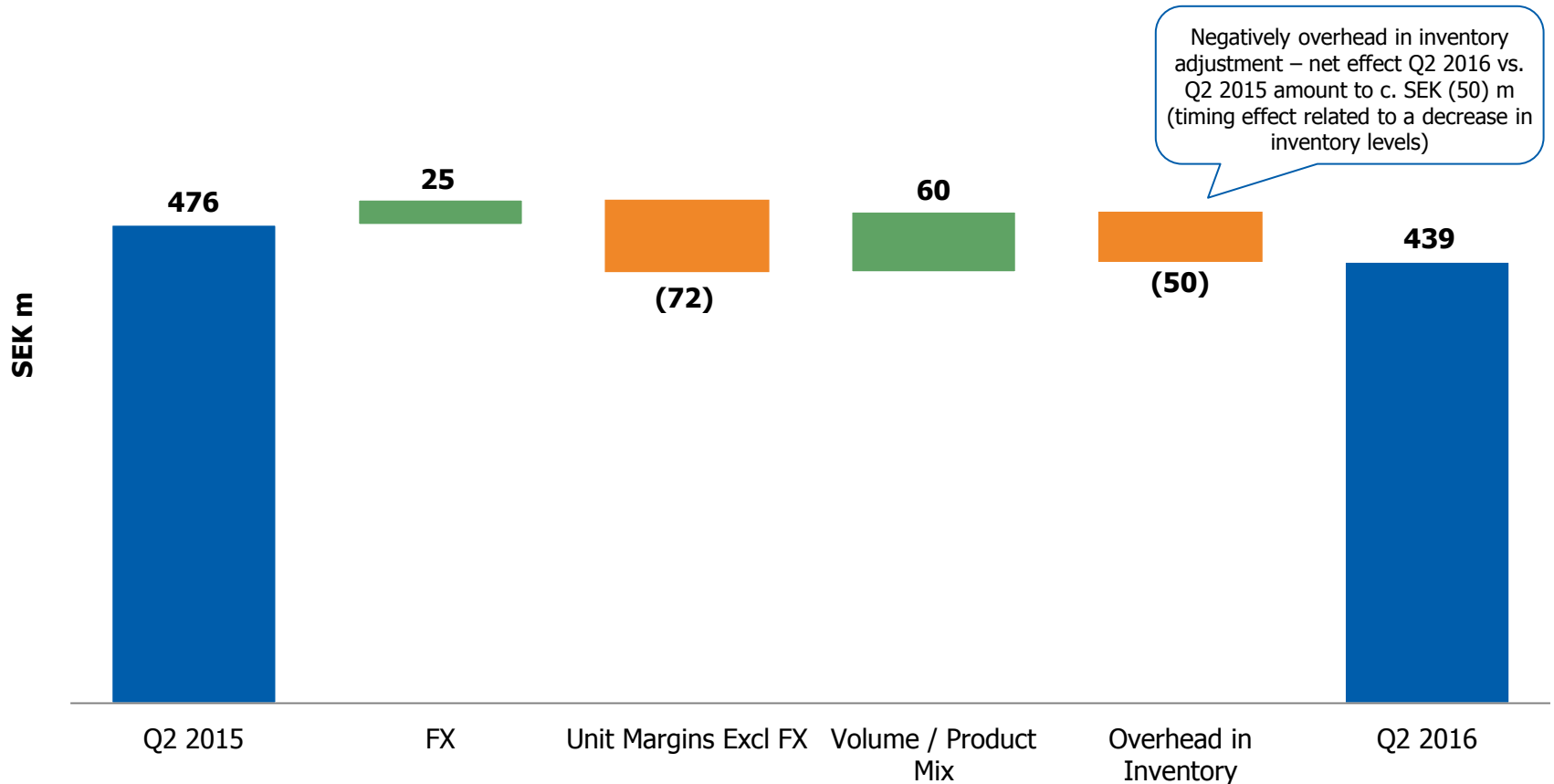
Q2 2016 Financial Highlights

	Q2-2016	Q2-2015	YTD Q2-2016	YTD Q2-2015	LTM Q2-2016	Q1-2016
Net Sales	2,730	2,991	5,346	5,940	10,555	2,616
% Growth (Y-o-Y)	(9)%		(10)%			(11)%
Marginal Contribution	938	946	1,848	1,866	3,397	910
<i>% of Sales</i>	<i>34.4%</i>	<i>31.6%</i>	<i>34.6%</i>	<i>31.4%</i>	<i>32.2%</i>	<i>34.8%</i>
EBITDA, Reported	426	481	870	1,006	1,517	443
<i>% of Sales</i>	<i>15.6%</i>	<i>16.1%</i>	<i>16.3%</i>	<i>16.9%</i>	<i>14.4%</i>	<i>16.9%</i>
EBITDA, excl. non-recurring items	439	476	896	1,007	1,556	457
<i>% of Sales</i>	<i>16.1%</i>	<i>15.9%</i>	<i>16.8%</i>	<i>17.0%</i>	<i>14.7%</i>	<i>17.5%</i>

- ➔ Volume-based sales growth was +5%, whereas Net sales decreased around 9% compared to Q2 2015, mainly as a consequence of lower sales prices reflecting the lower raw material prices
- ➔ Marginal contribution was close to the same level as last year. Unit margins (SEK/kg) were slightly lower year-on-year whereas margins in % of sales improved to c. 34%
- ➔ EBITDA excluding non recurring items amounted to SEK 439m vs. 476m Q2 2015, primarily due to slightly lower margins and negative timing effects linked to temporary inventory destocking, partly offset by stronger volumes and positive FX effects

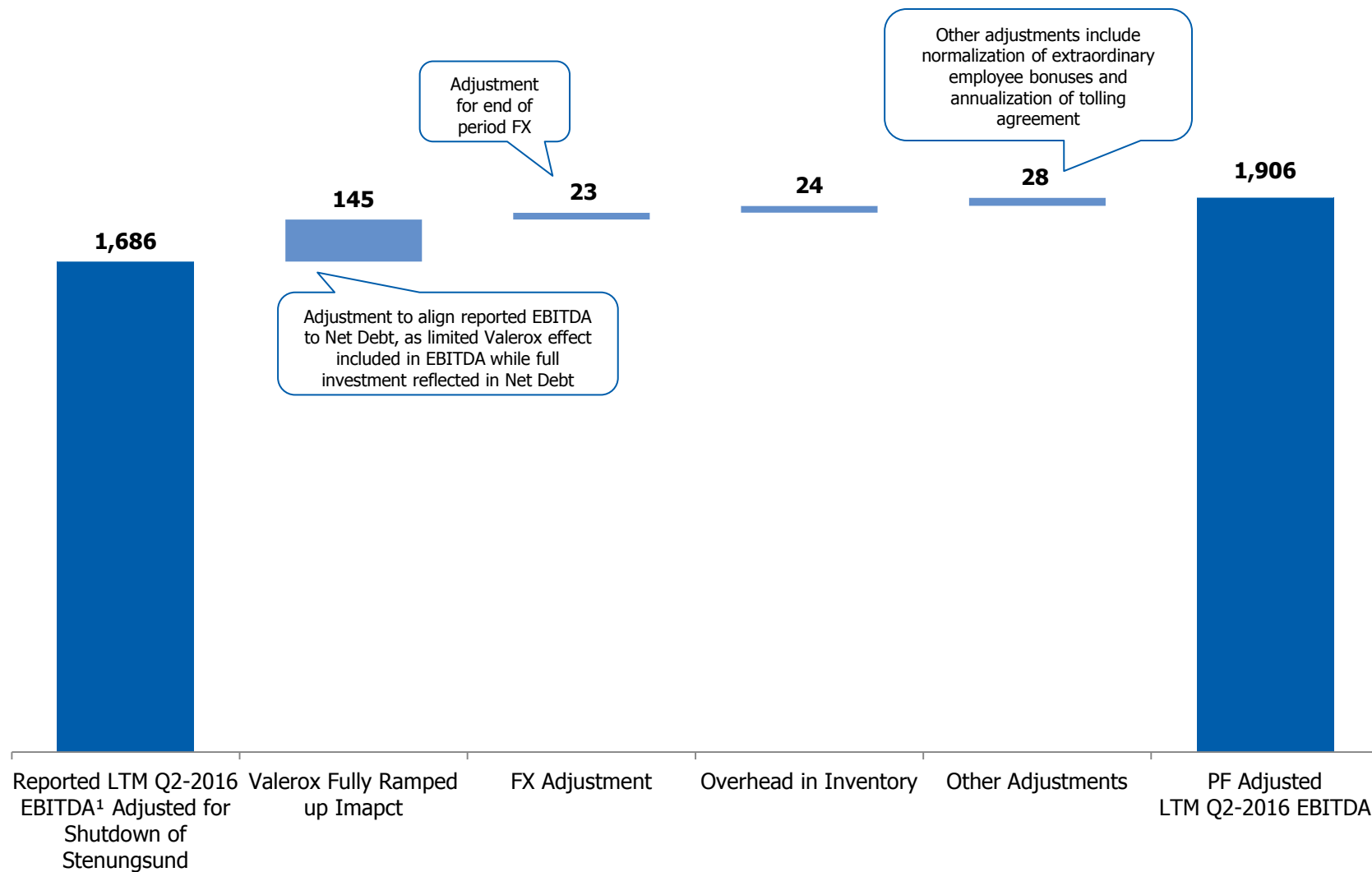
Note: All financials shown in SEKm.

Bridge EBITDA excl. Non Recurring Items Q2 2016 vs. Q2 2015



- ➔ Q2 2016 EBITDA excluding non recurring items decreased SEK 37m year-on-year, primarily explained slightly lower margins and negative timing effects linked to temporary inventory destocking, partly offset by stronger volumes and positive FX effects

PF LTM Q2 2016 EBITDA Bridge (SEKm)



Source: Company Information.

¹ Excluding non-recurring items.

Indebtedness

Current Capital Structure Details (Q2 2016)				
	USDm equiv.	SEKm	x Reported LTM Q2 2016 EBITDA ¹	x PF Adjusted LTM Q2 2016 EBITDA ²
Cash on balance sheet	(82)	(691)		
Senior secured notes (€)	300	2,543		
Senior secured notes (\$)	380	3,222		
Net senior secured debt	598	5,074	3.3x	2.7x
Second lien notes (\$)	370	3,138		
Net second lien debt	968	8,212	5.3x	4.3x
Mezzanine loans (€)	414	3,512		
Other debt	5	42		
Net debt, excl. pensions and shareholder loan	1,387	11,766	7.6x	6.2x

- ➔ Net debt, excl. pensions and the shareholder loan increased by SEK 384m during Q2/16, due to negative translation effects from FX rates and negative cash flow after financial net
- ➔ Available funds per end of Q2/16 amounted to SEK 897m (undrawn RCF and cash, excl. restricted)

Note: Fx rates; USD 8.48 and Euro 9.42

¹ Based on Reported LTM Q2 2016 EBITDA of SEK 1,556m excluding non-recurring items.

² Based on PF Adjusted LTM Q2 2016 EBITDA of SEK 1,906m.

Q2 2016 Conclusion and Current Trading

- ➔ Specialties & Solutions continued the steady improvement over last year, with healthy margins
- ➔ Within Advanced Chemicals & Derivatives, the picture is more fragmented. Our Polyols businesses developed well. The competitive business sentiment continued for especially our Formates and part of our Oxo portfolio
- ➔ Solid marginal contribution generation, partly offset by negative timing effects resulting in a EBITDA slightly below last year's level
- ➔ We don't expect any major changes in the demand for our main product lines in the third quarter of 2016 and free cash flow expected to remain positive
- ➔ Following the Company's continued robust performance, Perstorp, together with its shareholders, is assessing a range of strategic options, including a potential stock exchange listing or a refinancing of the capital structure



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future

Q&A