



Perstorp
creates your
world for a more
sustainable future

EMEA Leveraged Finance Conference
London
September 30th 2014

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Presenting today



Jan Secher

President and CEO

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

Agenda

1. Perstorp in short
2. First 12 months achievements
3. Financial performance
4. Way forward
5. Q&A



Perstorp in brief

Business snapshot

- ➔ **Vertically integrated, global specialty chemicals producer with leading market positions**
 - ➔ ~80% of net sales from products with **#1-3 positions**
- ➔ Focus on **aldehyde and hydroformylation chemistry**
- ➔ Vertical integration and flexibility along **five production platforms**
- ➔ Focus on **high-growth niches** within market segments
- ➔ **9 production sites in 8 countries** across Europe, Asia and North America
- ➔ LTM June 2014 Net sales of Euro 1,221m and **EBITDA of Euro 137m (11,2%)**

Global presence



Our products enable key properties in a broad range of products

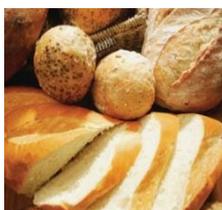
...smooth finish on leather (Bis-MPA)



...shatterproof windshields (2-EHA)



...natural freshness in breads & cheeses (Profina™)



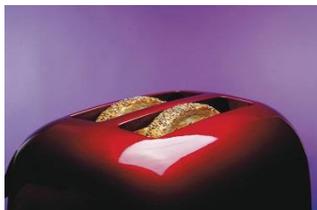
...paint made from renewable raw materials and energy (Voxtar™)



...scratch-resistant coatings for plastics in handheld electronics (Di-Penta)



...durable appliance surfaces (BEPD)



...performance skateboard wheels (Alkoxylate 3990)



...toe & heel counter reinforcement in shoes (Capa™)



...additives that protect grain and grass feed during storage (ProMyr™ and ProSid™)



...lubricants for air conditioners that do not damage the ozone layer (Penta and 2EHA)



...environmentally friendly and safe drilling muds (potassium formate)



...intumescent coatings to provide safety in public buildings (Charmor™)

Megatrends touched by Perstorp

Change in demographics

**Perstorp's
response**

Perstorp offers products and solutions to promote safe feed, healthy animals and healthy food without the usage of antibiotics

Environmental issues

**Perstorp's
response**

Perstorp provides key ingredients for materials which are e.g. more durable, recyclable and biodegradable for a more sustainable world

**Fast introduction of new
technology**

**Perstorp's
response**

Perstorp provides products and solutions for coatings and shock absorption to be used for mobile phones and tablets

Perstorp makes a difference

The world population is growing and major economies with growing welfare are consuming more meat per capita, increasing the pressure on food/feed resources.

- ➔ Perstorp has a feed additives portfolio, offering several ways to reduce feed needs through better utilization of nutrients by
 - ➔ prolonging the storage time and
 - ➔ maintaining nutritional value
- ➔ According to FAO, at least 25 % of the world's food crops are contaminated with mycotoxins
 - ➔ Perstorp's ProSid™ products help to reduce the threat of mycotoxins.



Perstorp makes a difference

Only a small share of the global production of plastics is being recycled and the majority of plastic waste either contributes to CO2 enrichment or to pollution and poisoning of oceans and the landscape.

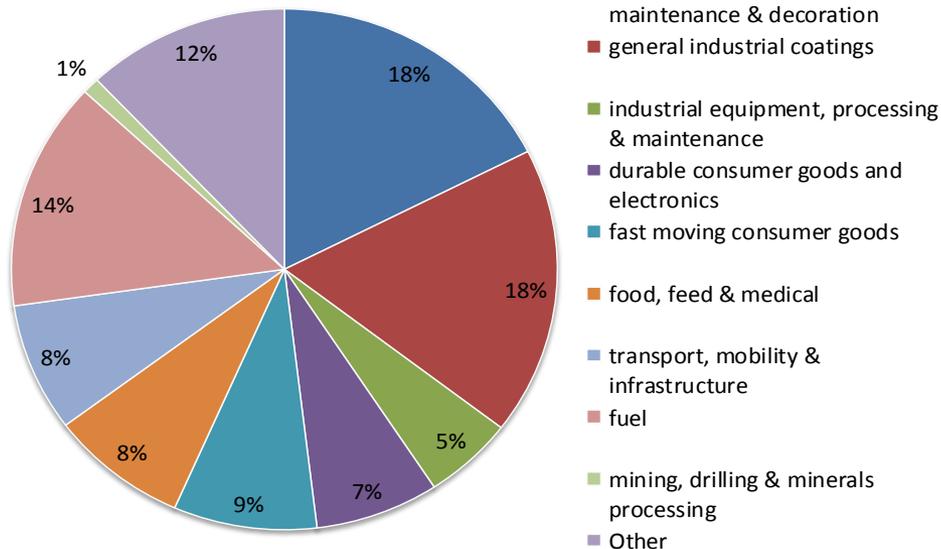
- ➔ Biodegradable plastics contribute to avoid the problem of waste disposal and Perstorp's Capa™ for Bioplastic is a part of a solution for more sustainable waste management
 - ➔ Used eg for biodegradable packaging for compostable waste handling
 - ➔ Provides a cleaner and more attractive alternative for end consumers to separate organic waste
 - ➔ Increases the amount of organic waste available for eg biogas production
 - ➔ Decreases the amount of waste going to combustion and land filling



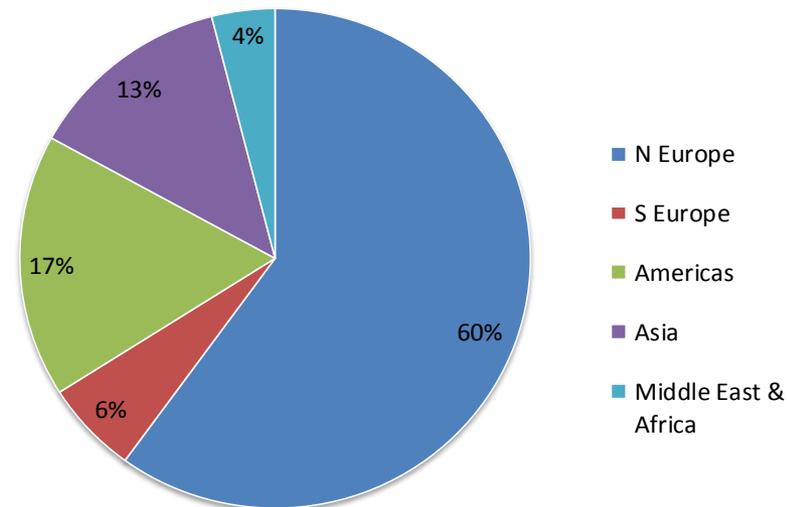
Diversified portfolio offering across geographies

Net Sales

by End-market

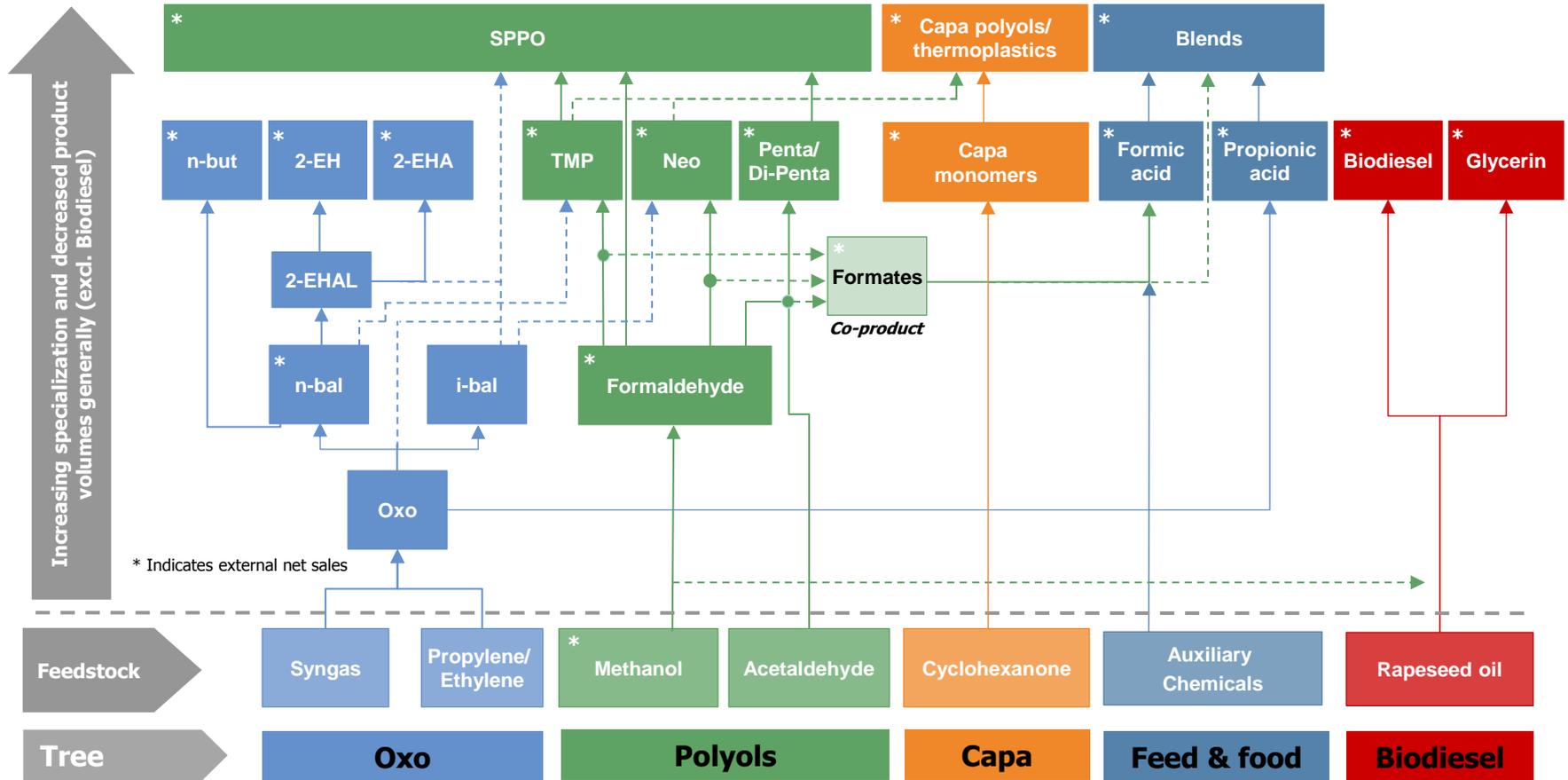


by Geography



Diversification limits dependency on individual products or markets

Efficient, flexible platforms based on integrated production trees



- ➔ Ability to enter into niche and highly profitable downstream and derivative markets
- ➔ Beneficial raw material sourcing position – including pipeline to Borealis' cracker
- ➔ Strong innovation and scale benefits of integration
- ➔ Optimize profitability in different market environments
- ➔ High barriers to entry

The Perstorp value chain

Raw materials

75% based on oil or natural gas.

Perstorp's integrated production set-up

Leading edge operator and optimizer of specific chemical manufacturing platforms

End applications

Strategic supplier of selected niche products to various end-industries

Rapeseed oil
Metal oxides
Oil & gas

Methanol
Acetaldehyde
Ethylene/Propylene
Cyclohexanone

		Market segments				
		Coatings & Resins	Plastic materials	Feed & Food	Fuels	Synthetic Lubricants
Manufacturing platforms	Oxo	✓	✓	✓	✓	✓
	Polyols	✓	✓	✓		✓
	Caprolactones	✓	✓			✓
	RME	✓		✓	✓	

Adhesives
Biofuels
Chemicals industry
Coatings
Cosmetics
Elastomers & foams
Feed & Food
Leather & textiles
Intumeccent coatings
Plastic additives & plasticizers
Plastics
Safety glass
Lubricants
Thermoplastics
Printing inks
Waterborne coatings

Focus on five core market segments

Perstorp has clear strategies for the core market segments that overlap with the core manufacturing platforms and expertise



Coatings & Resins

Perstorp's offer covers everything from critical building blocks to high value specialties for the global coatings and resins market. Perstorp's products enables coatings systems with low environmental impact and high performance to meet customer, end-user and regulatory demands.



Plastic materials

Perstorp's products for plastics and composites enhance the performance of many everyday items such as furniture, automotives and shoes providing better comfort, esthetics and durability. Perstorp's plastic additives and plasticizers enhance and customize the properties of plastic end products.



Feed & Food

Improving nutrient content, inhibiting mould growth, antibacterial treatment and aiding digestion are just a few of the benefits of the feed additives, ensiling agents and preservatives from Perstorp. Together they boost the productivity and quality of meat, milk and egg production.



Fuels

Perstorp is the largest producer of biofuel based on rapeseed oil (RME) in Scandinavia, with Verdis Polaris™ B100, used for blending with up to 7% with fossil diesel and for use as a 100% renewable fuel, as its flagship product.



Synthetic lubricants

A market with an above average growth, driven – among other things – by environmental legislations. Perstorp has a strategically important position in this segment as a supplier of key intermediates used in synthetic lubricant manufacturing.

Market leadership in consolidated markets

Business Unit	Market Share of Top 3 Players		Perstorp Market Position
Oxo	2-EHA	>65%	#1
	Oxo	>70%	#3 (Europe)
Penta	Di-Penta	>75%	#1
	Penta	>50%	#1
TMP & Neo Polyols	TMP	>70%	#1
	Neo	>50%	#3
Caprolactones	Capa	>90%	#1
Feed & Food	Propionic Acid	~75%	#2 (Europe) #4
BioFuel	RME	>90%	#1 (Scandinavia)

- ➔ #1 in more than 60% of our businesses
- ➔ ~80% of net sales coming from products where Perstorp holds a #1-3 position
- ➔ Most markets characterized by “rational” competitors
- ➔ Historically stable markets

Sustainability through innovative product solutions...

Voxtar™

Pure advantage

Only Penta with 100% renewable raw materials; cuts carbon footprint by 75%

Holtac™

Lead-free for PVC

Enabling lead-free PVC without compromising performance and quality

Charmor™ PP100

Protecting people & property

Improves fire resistance with thick char barrier and non-toxic fumes for thermoplastics

Verdis Polaris™

Biodiesel for the Nordic climate

Sustainable fuel that provides conversion to green transport and halves dioxide emissions



...and through responsible manufacturing

Carbon footprint

Best in class

From cradle to factory gate, a typical Perstorp produced chemical holds 1 kg carbon dioxide per 1 kg product. This is extremely low and considered to be best in class!

Energy consumption

Constant decrease

Perstorp is constantly working to minimize energy consumption, in 2012 the decrease was 5% per ton of produced product

Employee survey

Actively seeking feedback

In the last employee survey conducted in 2012 the response frequency was higher than every, 94% of all employees took the chance to influence their work situation



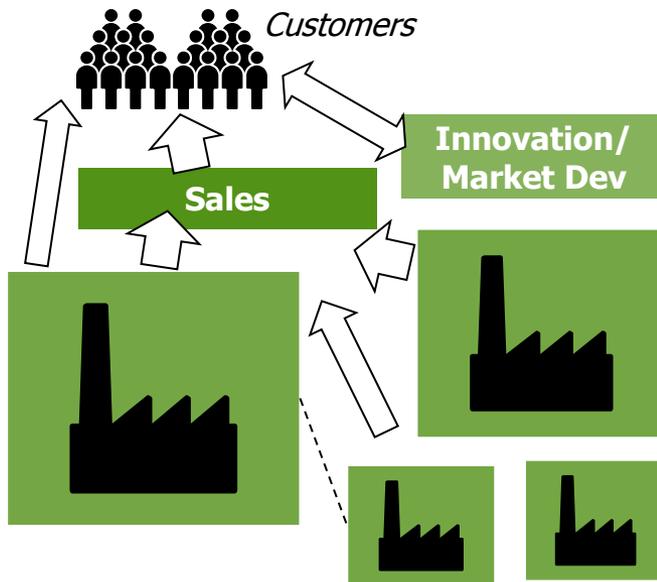
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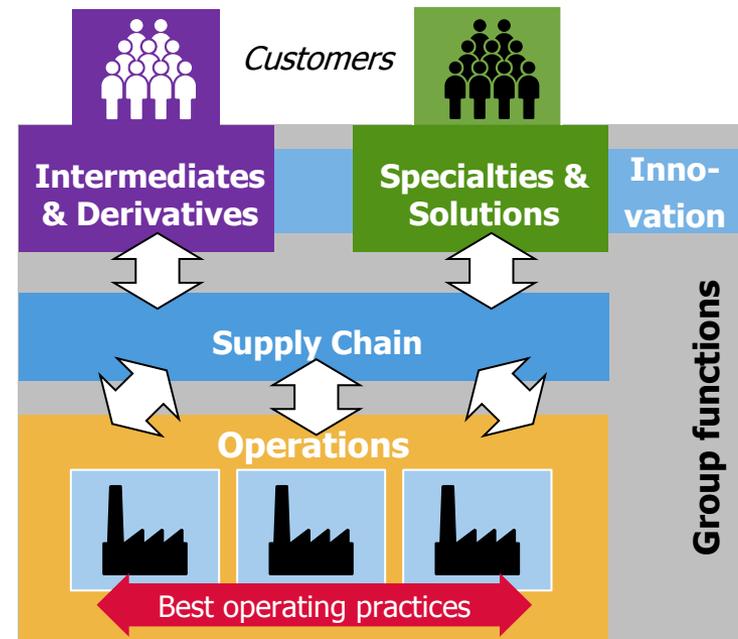
Fundamental changes in the way we do business & run our company

Past organization



- ➔ Stand-alone sites
- ➔ Limited collaboration
- ➔ Mixed results (financials, efficiency & safety)

New Organization



- ➔ Business Areas focused on market needs
- ➔ Strong supply chain
- ➔ World-class production & safety
- ➔ Efficient functions

Group structure & customer overview

Intermediates & Derivatives

80%

Specialty & Solutions

20%

Business Units

Oxo



Used In

- ➔ Plasticizers for safety glass
- ➔ Products for decorative coatings

Penta



Used In

- ➔ Decorative and industrial coatings
- ➔ Radiation-cured resins

TMP & Neo Polyols



Used In

- ➔ Powder coatings
- ➔ Radiation-cured and other industrial coatings

Formates



Used In

- ➔ Oil drilling
- ➔ Leather tanning
- ➔ De-Icing

BioFuels



Used In

- ➔ Biodiesel (blended and pure)

Caprolactones



Used In

- ➔ Footwear, automotive & plastics
- ➔ OEM coatings & additives

Feed & Food



Used In

- ➔ Grain & silage preservation
- ➔ Additives for animal feed & drinking water

Specialty Polyols



Used In

- ➔ Industrial coatings
- ➔ Printing inks
- ➔ Fire protection
- ➔ Polymer additive

Customers

EASTMAN



ARKEMA
INNOVATIVE CHEMISTRY



Lubrizol



Perstorp Executive Leadership Team – wealth of international experience



CEO
Jan Secher



**EVP Finance,
Legal & IT**
**Magnus Heimborg as of Dec 1st
2014**



**EVP BA Intermediates
& Derivatives**
Gorm Jensen



**EVP Regions &
Group Management**
Mikael Gedin



**EVP BA Specialties
& Solutions**
Marie Grönberg



**EVP Innovation &
Strategy**
Eric Appelman



EVP Supply Chain
Wolfgang Laures



**EVP Transformation
Projects**
Anders Lundin



EVP Operations
Jan Secher (acting)

With 4 nationalities, experience from >10 countries, and more than 150 years of leadership experience (of which >100 in Chemicals), the new ELT is a very international and experienced management team

Results so far...

- New structure, operating model, tools, and leaders in place
 - Redundancy program implemented (110 FTE)
 - Selected hires in Key functions such as marketing, procurement, BU management etc.
 - Moved Head office to Malmö
 - Implemented our Performance excellence model
- We have re-focused
 - Increased Capa and NEO volumes, better utilizing our assets
 - Moved the go-live of Valerox forward (earlier) by a quarter
 - Intense premarketing of new plasticizer to kick-start Valerox earnings
- We have purchased the Penta and CaFo business of Chemko (<1 year payback)
- Re-directed our R&D focus to align with Megatrends without neglecting our current product portfolio. Several exciting products in the pipeline
- Four consecutive quarters with improving LTM EBITDA



Agenda

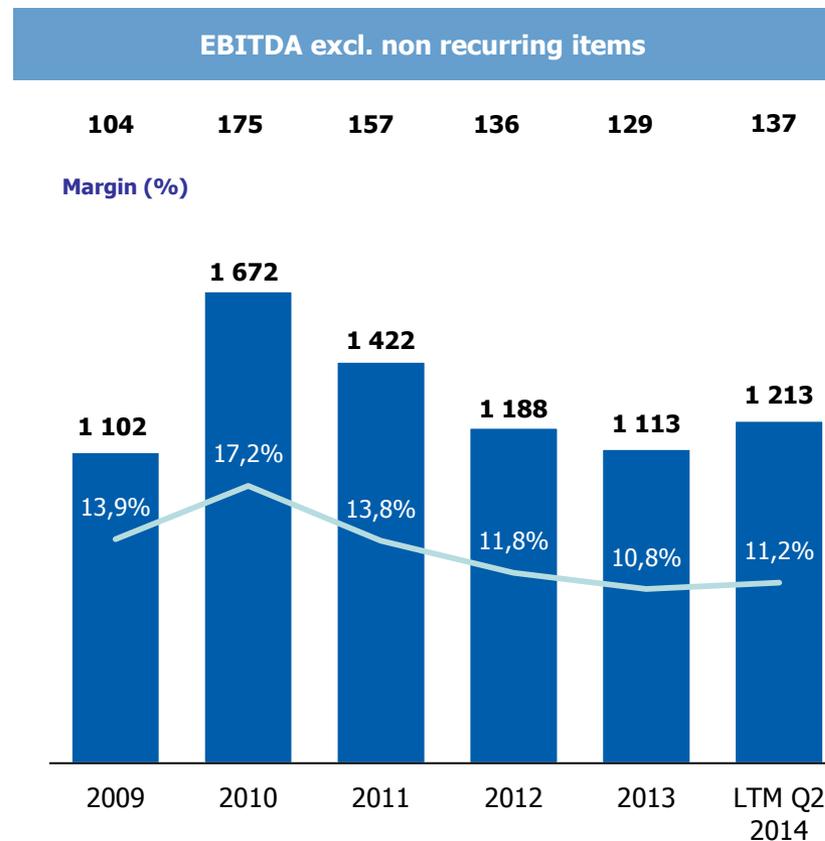
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Results still below historical levels ...



- ➔ Robust volume recovery following impact of economic slowdown in 2009
- ➔ Price increases reflecting rising raw material price environment *historically only* partly pushed forward to customers

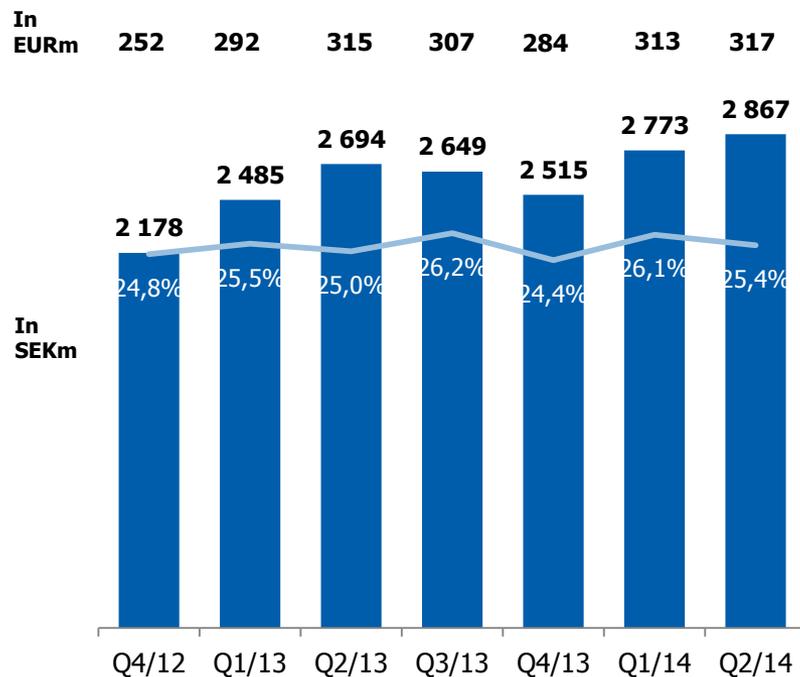


- ➔ 2010 exceptionally strong primarily due to favourable contribution ratio in combination with a sharp volume recovery from 2009
- ➔ Margins have eroded following a competitive market environment and negative FX effects
- ➔ Results have started to improve following improved market conditions, weakening SEK and increased focus on margin management

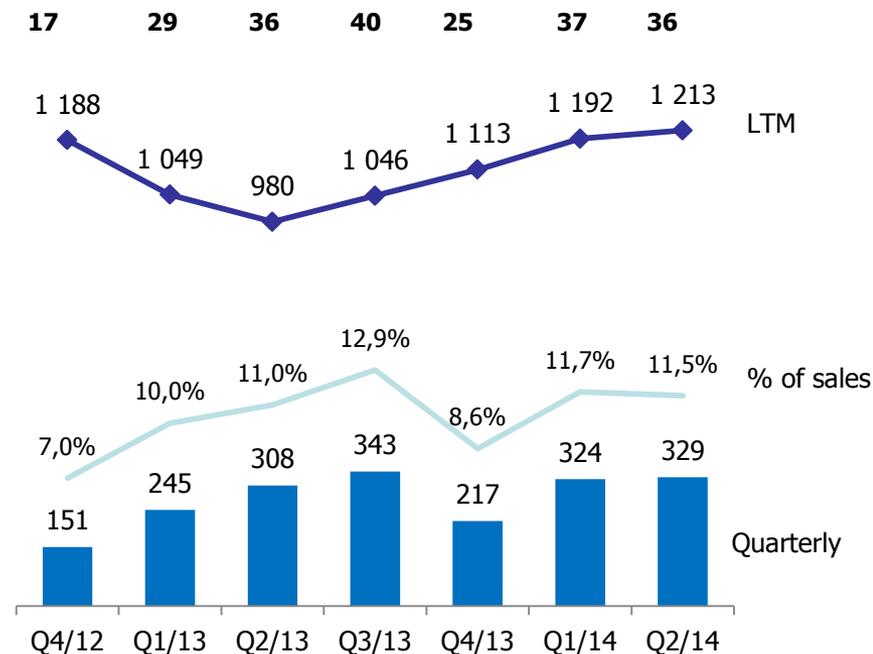
Note: Conversion from SEK to Euro have been made at actual average rates for the period.

... but recent performance shows improvement

Net Sales and contribution margin



EBITDA excl. non recurring items



- ➔ Sales and EBITDA have improved quarter by quarter since Q4 2012 primarily driven by stronger volumes; visible in most product lines
- ➔ The increased volumes mirrors an improved demand and our strategy to defend or in selective cases expand/recover our market share

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

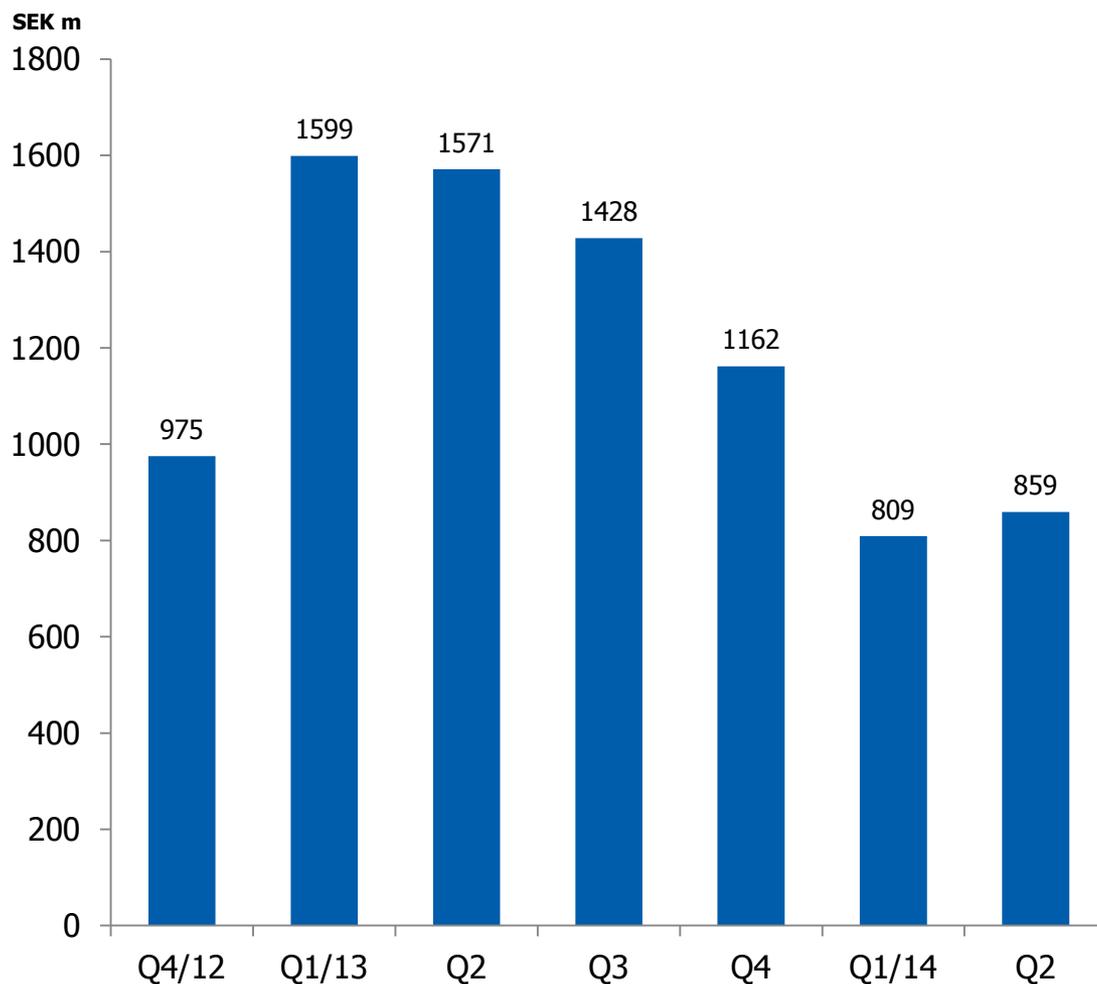
Cash flow generation

	Free Cash Flow ⁽¹⁾					
	2009	2010	2011	2012	2013	LTMQ2 2014
EBITDA excl. non recurring	1,102	1,672	1,422	1,188	1,113	1,213
Change in working capital	144	8	(76)	(82)	(151)	247
Maintenance capex	(184)	(231)	(150)	(276)	(241)	(262)
Free Cash Flow (before strategic capex)	1,062	1,449	1,196	830	721	1,198
<i>% of Adjusted EBITDA</i>	96%	87%	84%	70%	65%	99%
Strategic capex	(187)	(270)	(214)	(214)	(449)	(571)
Free Cash Flow	875	1,179	982	616	272	627
<i>% of Adjusted EBITDA</i>	79%	71%	69%	55%	24%	52%

Comments
➔ EBITDA excl. non recurring items increasing after a couple of years of lower earnings
➔ Moderate maintenance capex requirements
➔ Expansive strategic capex in 2013 and 2014 to enable step change in earnings
➔ Active working capital management including an off-balance sheet trade receivables financing program (Q2/2014)
➔ Cash flow conversion before strategic capex historically between 65% and 99%

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)

Available funds



Comments

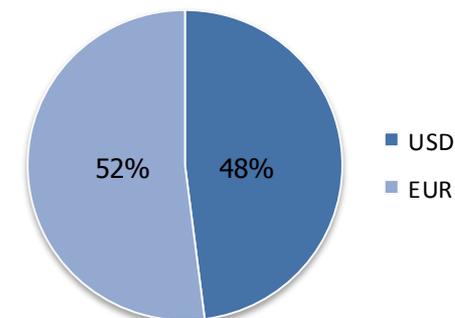
- ➔ Non-core assets were divested in Q1/2013 to enable the expansion in new strategic assets
- ➔ 2013 and 2014 cash negative following a period with substantial strategic investments
- ➔ Off-balance sheet trade receivables financing program implemented in Q2/2014
- ➔ An extension of the trade receivable financing program have been approved, EUR 55 m – to be implemented in Q4/2014

Overview of Capital structure Q2 2014

Current capital structure detail

	USDm equiv.	SEKm	x EBITDA excl non-rec.
Cash	-115	-775	
Senior secured notes (€)	368	2,483	
Senior secured notes (\$)	380	2,561	
Net senior secured debt	634	4,270	3.5 x
Second lien notes (\$)	370	2,494	
Net second lien debt	1,004	6,764	5.6 x
Mezzanine loans (€)	439	2,962	
Other debt	3	20	
Net debt, excl pensions and shareholder loan	1,446	9,747	8.0 x

Debt by currency



Note: the recent strengthening of the SEK has increased the net debt.
Using the average fx rate (similar for EBITDA) would reduce net debt to c. 9,500 (7,8x EBITDA)

Fx rates; USD 6.74 and Euro 9.20

Based on EBITDA excl non-rec. of SEK 1,213 m

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The way forward

Continue to execute on decided strategy

- ➔ Enhance leading positions by investing in niche market segments and capitalize on end-market growth drivers
- ➔ Focus on continued innovation and niche product development
- ➔ Optimize and leverage our integrated production platform
- ➔ Expand product portfolio through selective capex

Implementation of new business and operating model

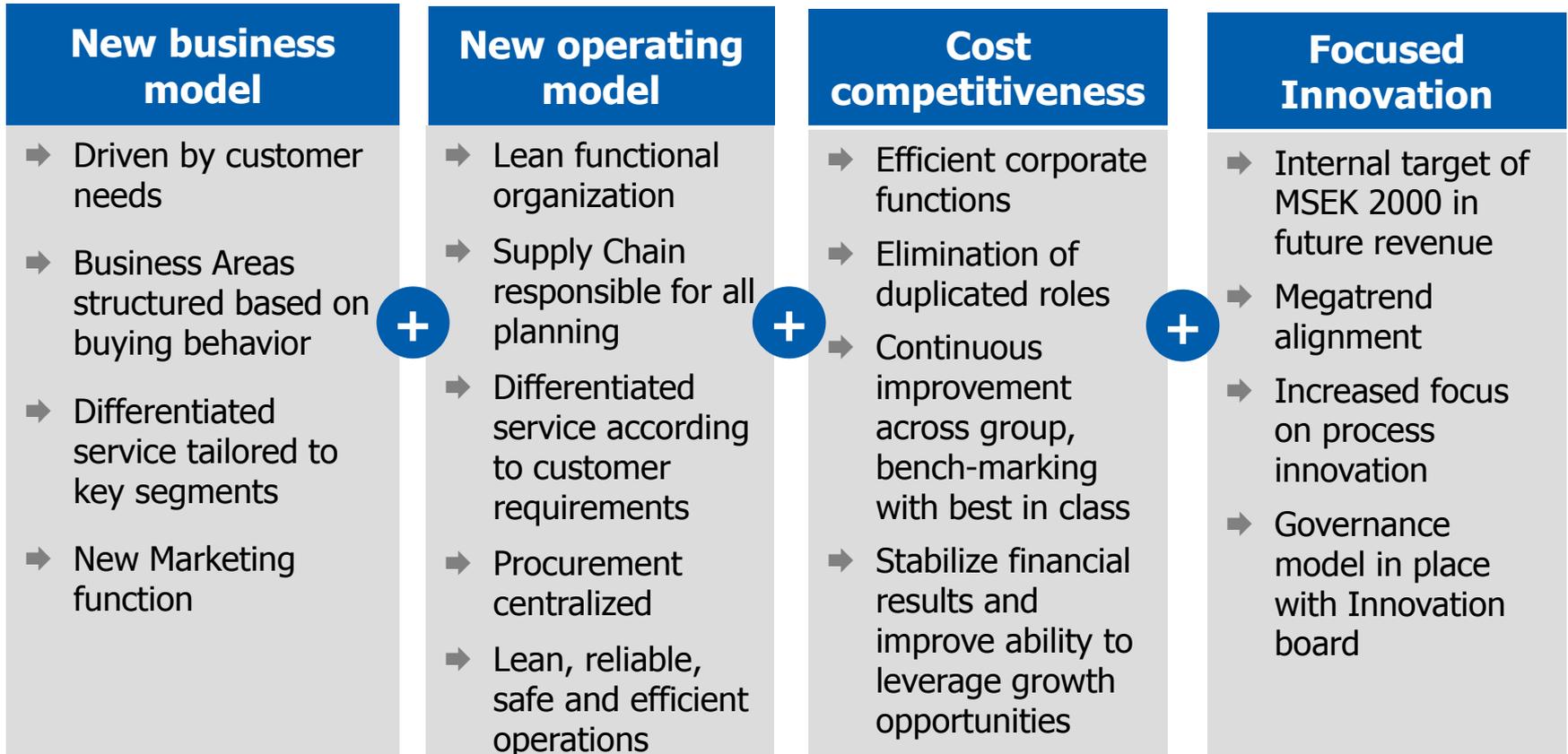
- ➔ Market driven new business and operating model
- ➔ New functional organization to achieve benchmark efficiencies and cost competitiveness
- ➔ New management team

2014 onwards - top priorities

- ➔ Margin management
- ➔ Implementing transformation program, from Good to Great
- ➔ Driving a performance culture
- ➔ Strengthening our position in key products
(Emoltene™ 100, Capa™, TMP/Neo, Penta)



Ensure true customer focus & achieve our strategic goals



The new Perstorp way-of-working

Examples from our strategic innovation pipeline

➔ **Prophorce SR - Acid esters for feed**

- ➔ Promotes animal health, which is both ethical and economical through faster growth and a more efficient feed intake
- ➔ From the basic growth promoter market it is possible to expand into higher volume markets like nutritional solutions
- ➔ Makes Perstorp well positioned to introduce other short acids, like valeric acid and propionic acid to these markets and also for upstream integration

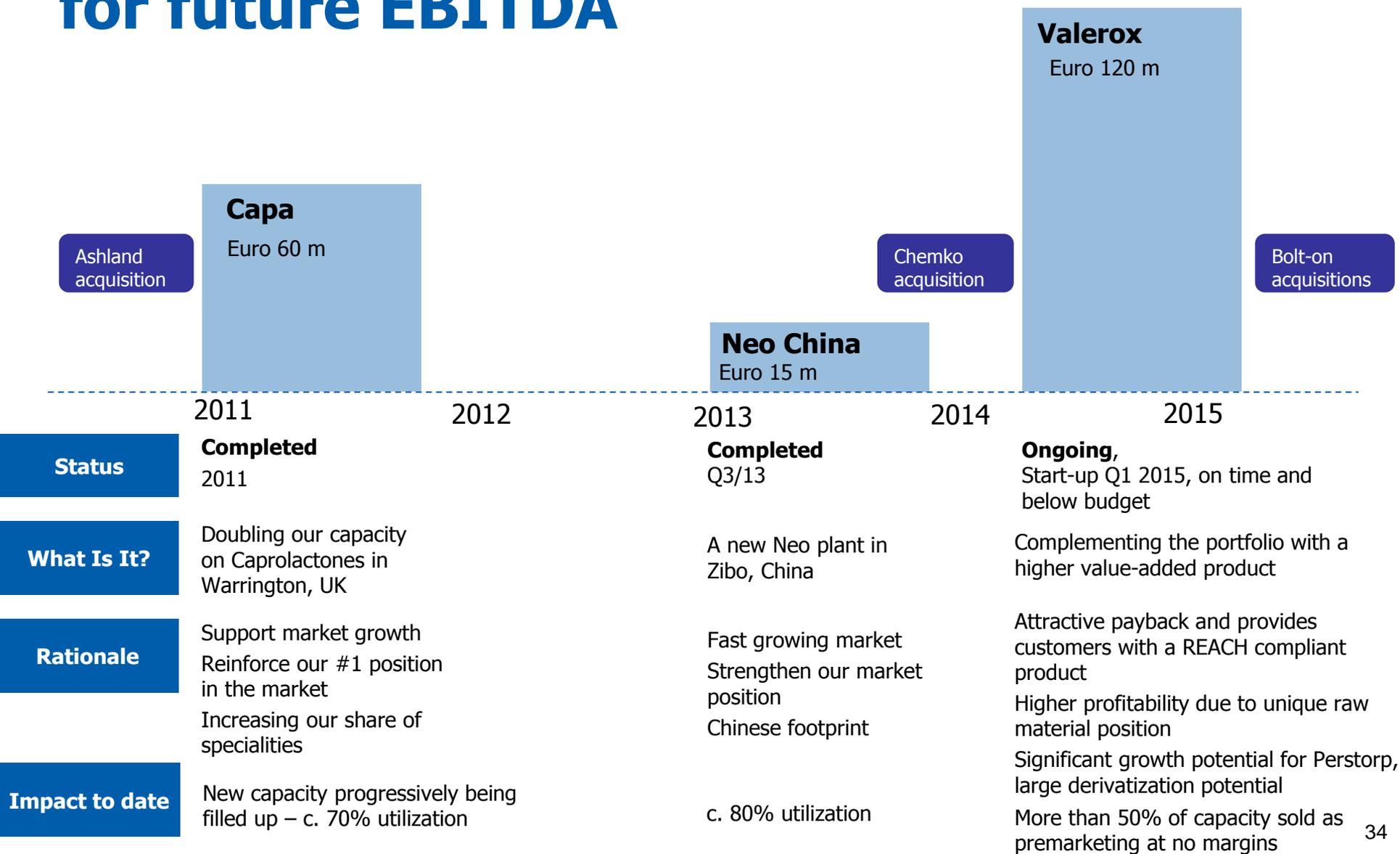
➔ **Bioplastics**

- ➔ Niche plastics with a market size of some 100 kt, that fits Perstorp strategy
- ➔ Strong growth of >10%, where the market is looking for new solutions
- ➔ Perstorp's global sales force can support local solutions
- ➔ The Capa technology has a clear edge in biodegradable plastics

We have invested for the future – now we are entering the payback period

- ➔ In the period from 2010 to early 2015 we will have invested around SEK 1,500 m in new capacities and small bolt-on acquisitions, with the biggest capex project, Valerox, to come on stream in Q1 2015
- ➔ Generally improving market conditions and our focus on GDP+ segments in combination with our new capacities will lift the financial performance in the years to come
- ➔ Geographic expansion in selected product lines
- ➔ Increased focus on our speciality portfolio

Strategic projects will be key drivers for future EBITDA



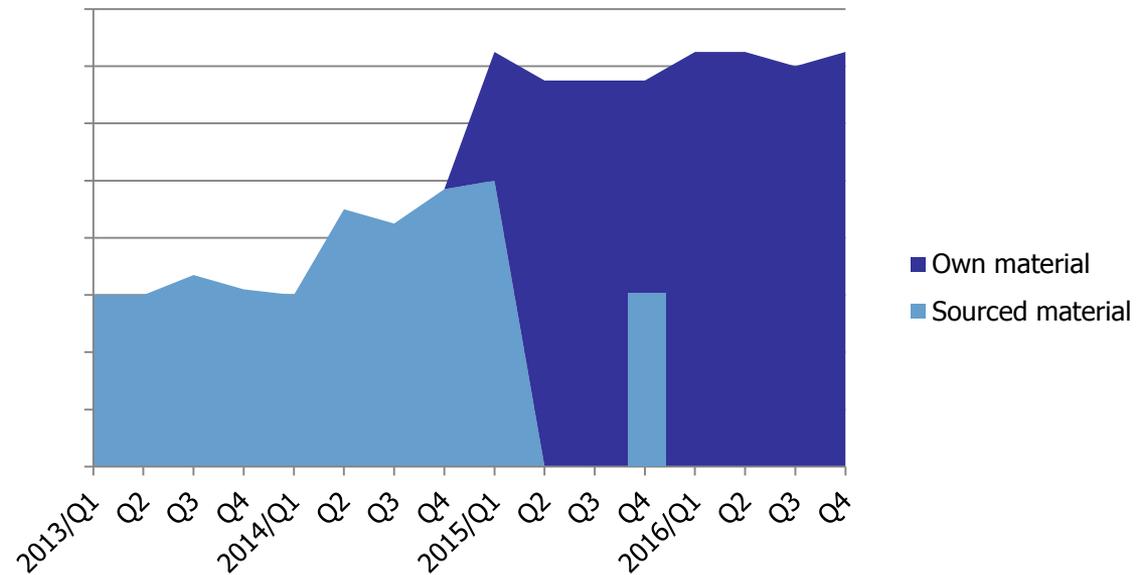
Valerox overview

Volumes

Sourced material vs own material

- Start-up scheduled for Q1/2014
- Own produced volumes to be ramped-up during 2014
- Multi week shutdown scheduled for Q3/2015

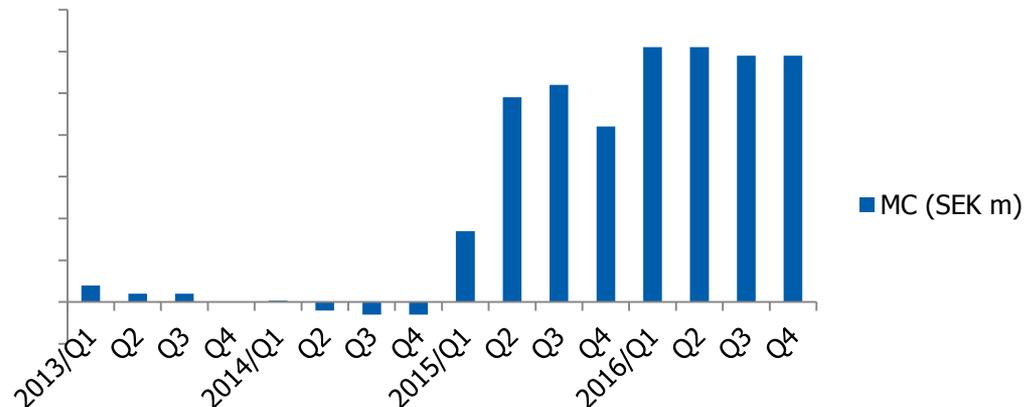
Volumes kMt per Q



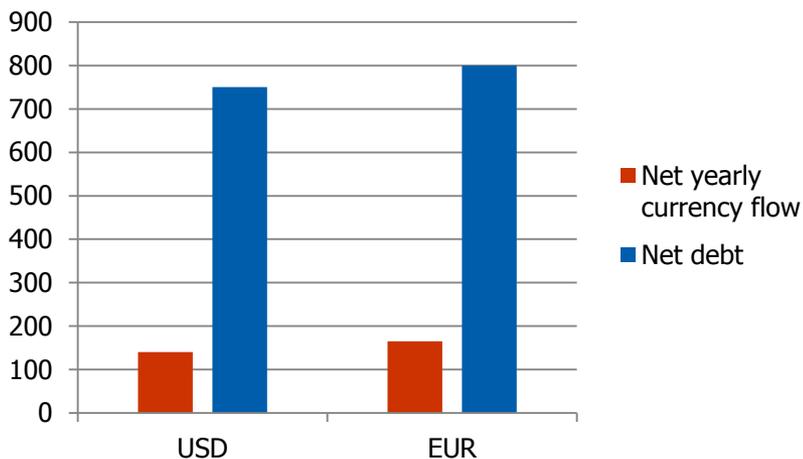
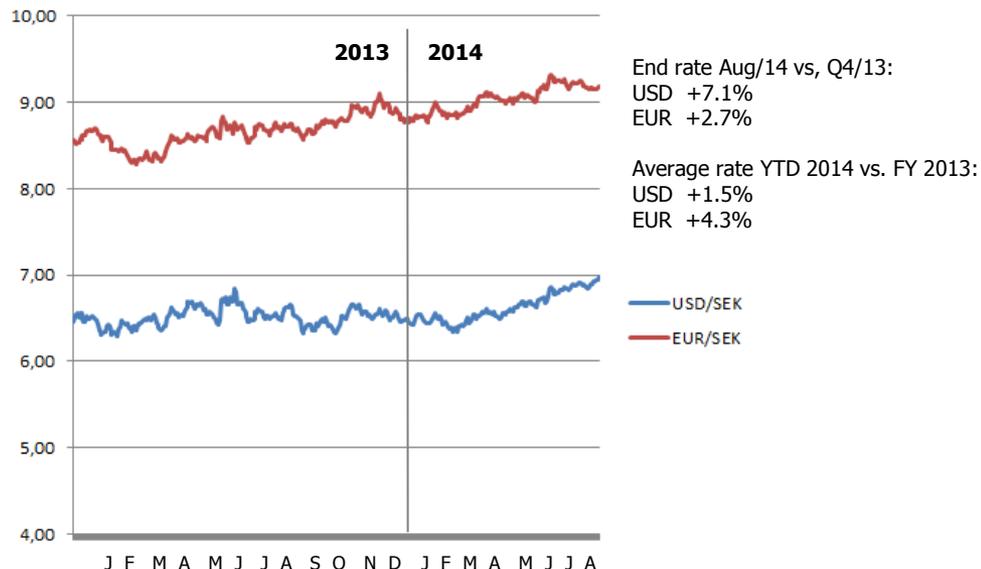
Profitability

MC generation (indicative)

- Pre-marketing volumes sold at low margins due to high sourcing cost
- Own Valeraldehyde will reduce costs significantly
- Plasticizer market assumed to improve driven by S/D 2015 and onwards



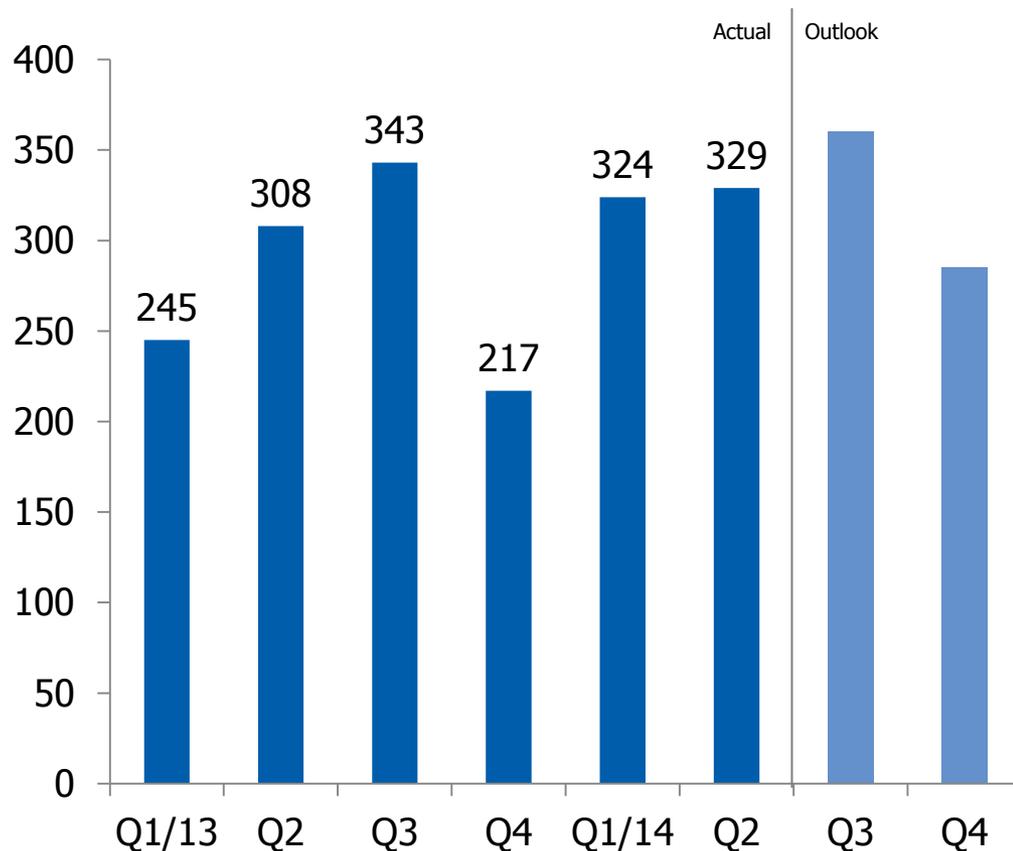
Fx impact



Comments

- ➔ The Swedish krona has weakened during 2014, which has a positive effect on earnings but a negative effect on net debt
- ➔ A 1% weaker SEK will have a positive effect on EBITDA on a yearly basis of:
 - USD/SEK = c. 9 m
 - EUR/SEK = c. 14 m
- ➔ The corresponding effect on Net debt:
 - USD/SEK = c. 50 m
 - EUR/SEK = c. 70 m

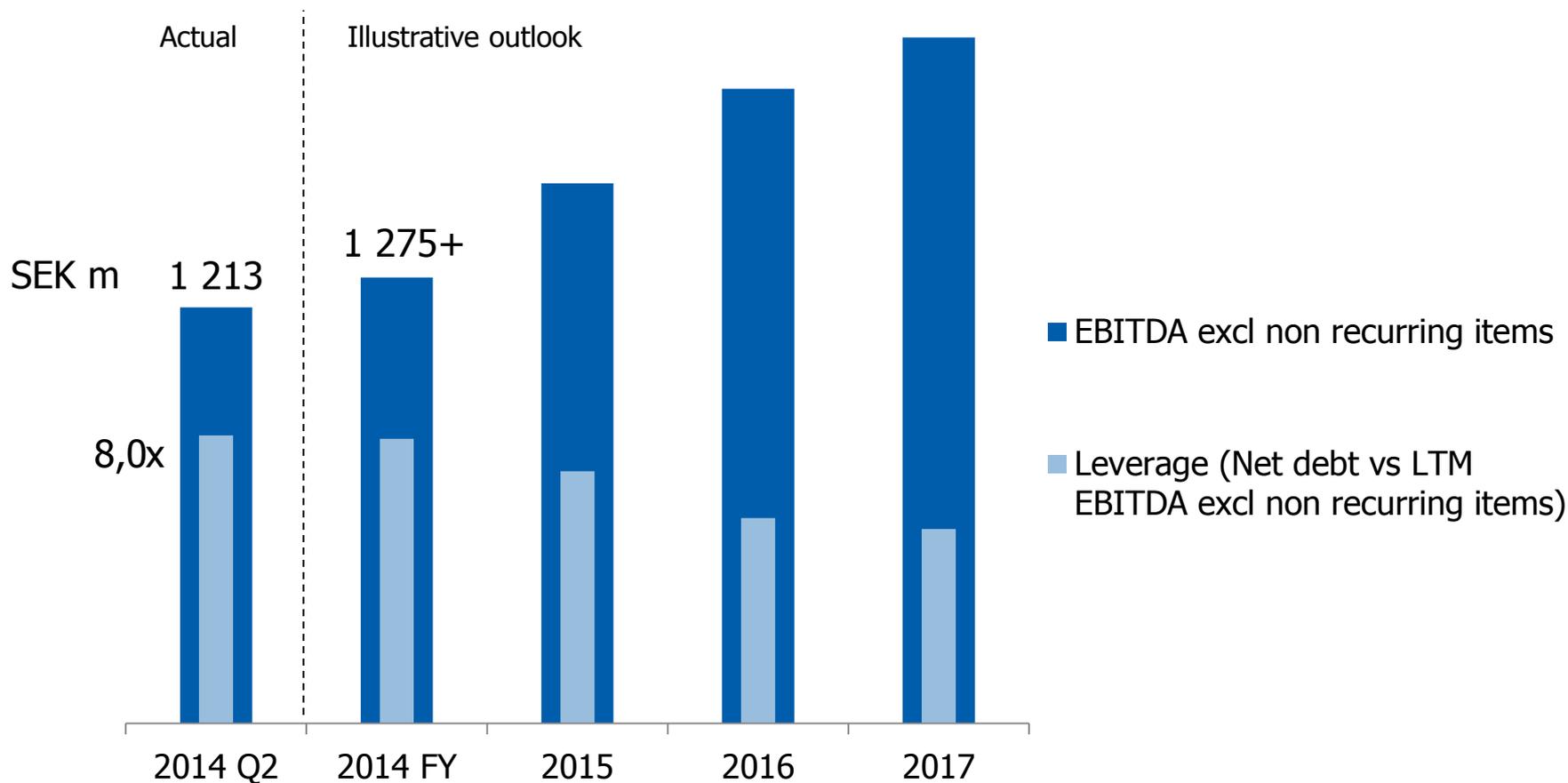
Outlook EBITDA



Comments

- ➔ Quarter on quarter performance have improved since end of 2012
- ➔ We expect that the trend will continue and that Q3/14 and Q4/14 will be stronger than respective quarter in 2013
- ➔ Forward looking assumption based on no dramatic change in market sentiment or Fx-markets

Financial performance and leverage

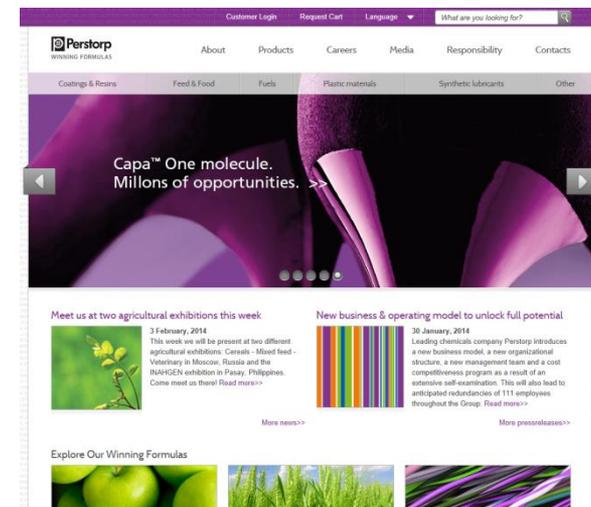


Financial calendar

Perstorp's financial information comprises interim reports, an end-of-year financial statement and an Annual & Social Responsibility Report. In H2 2014/ H1 2015 the financial information will be released as follows:

Release date	Report
6 November, 2014	Interim Report 1 January - 30 September, 2014
3 March, 2015	Year-end Report 2014
30 April, 2015	Annual & Social Responsibility Report 2014
15 May, 2015	Interim Report 1 January - 31 March, 2015

➔ More IR info on perstorp.com





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Q&A