





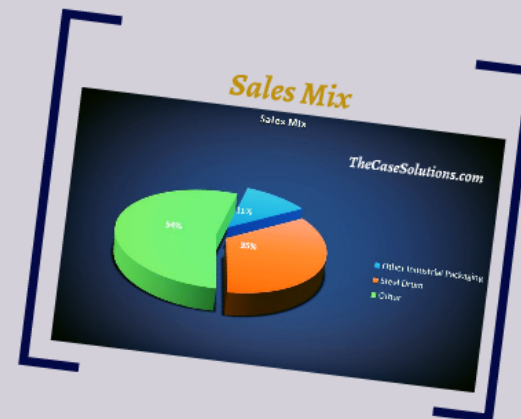
Three Verb-Ideas for Your Creative Action

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Verbeek Overview

- Founded in 1919
- Steel Drum manufacturing in 1925
- #1 in Europe, established in 7 countries by 1940s
- 2012, 3% sales growth to €2.552 billion

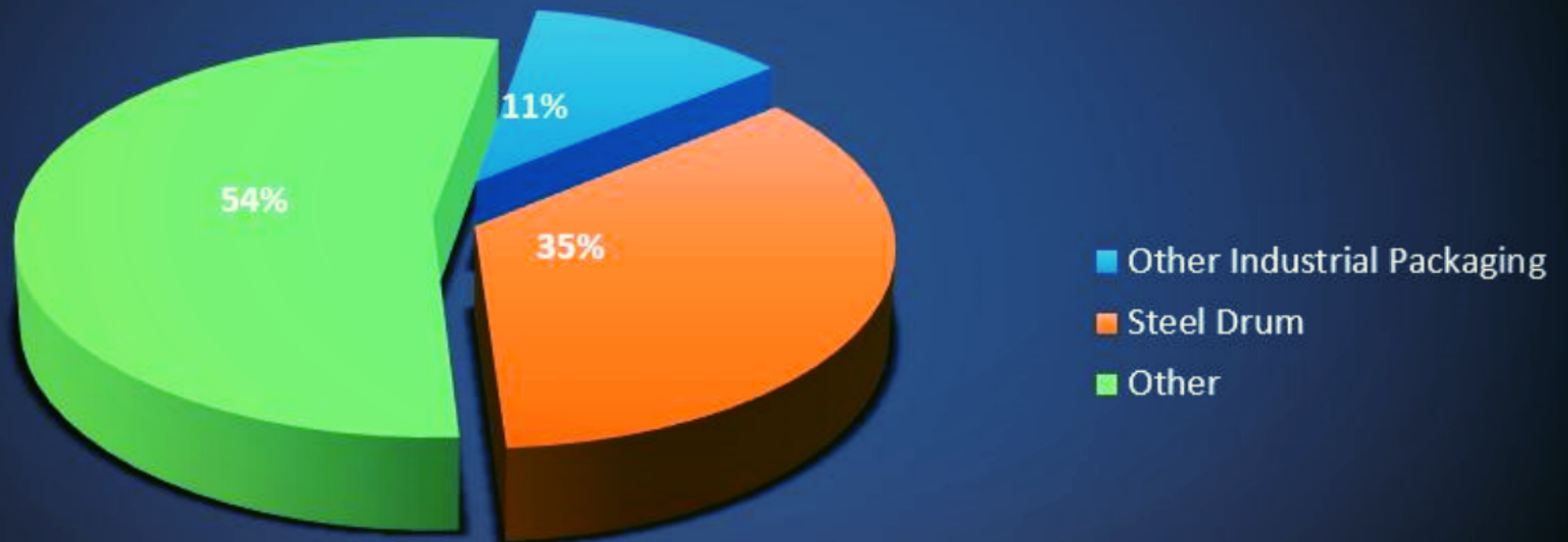
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Sales Mix

Sales Mix

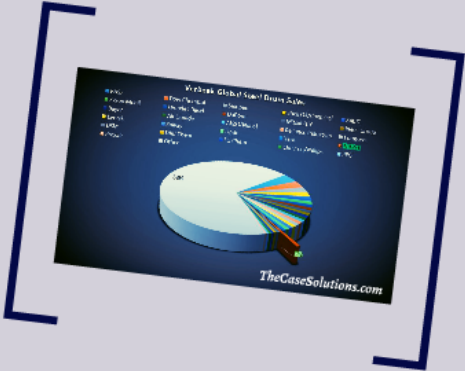
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Sales Overview

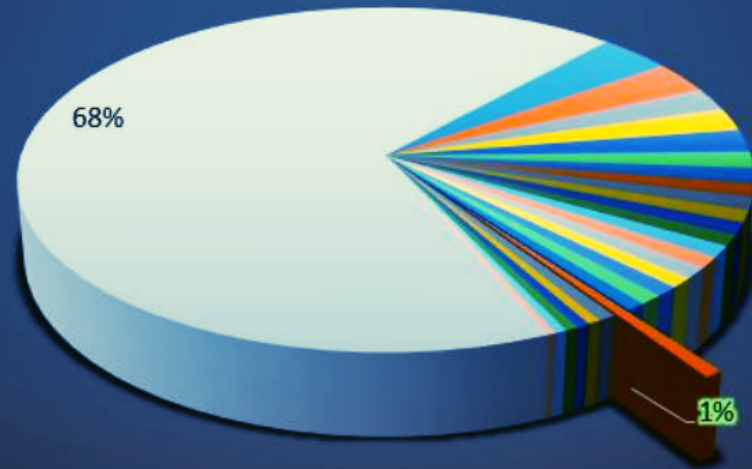


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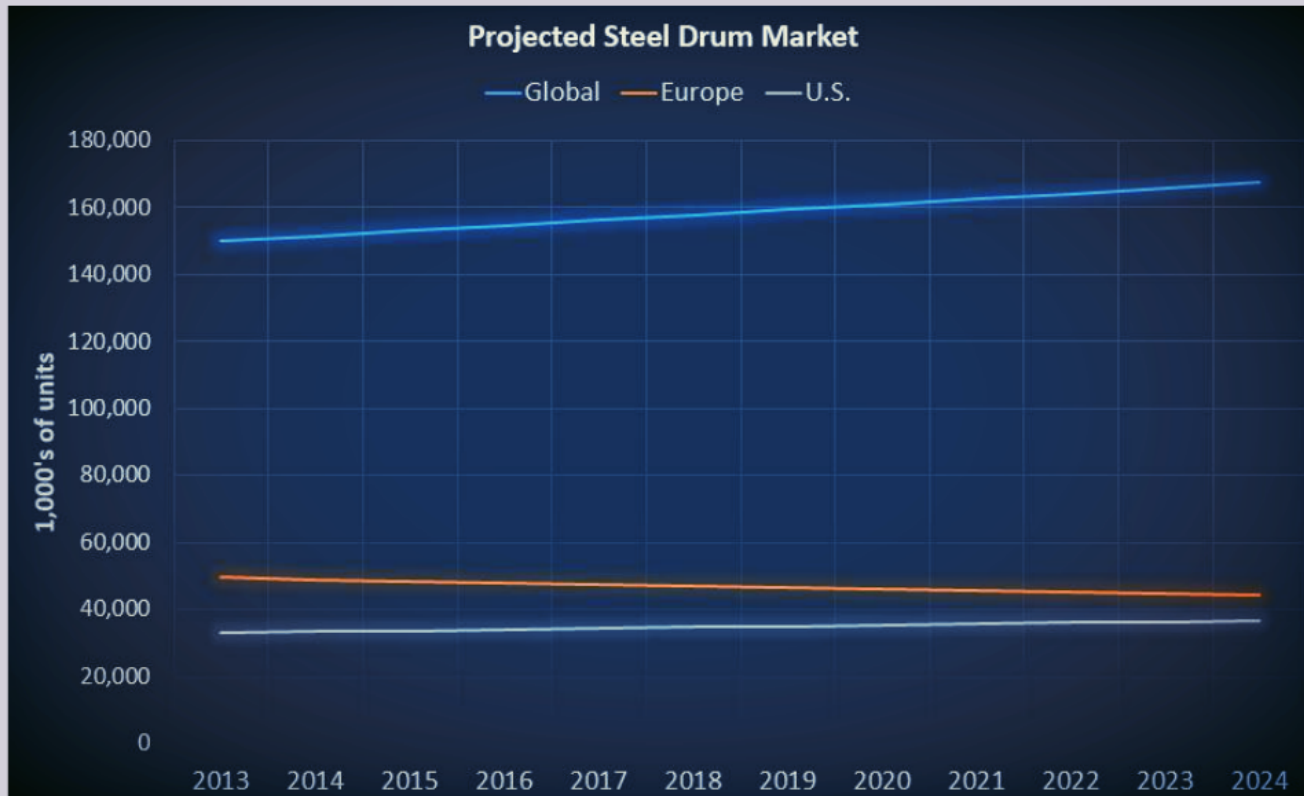
Verbeek Global Steel Drum Sales

- | | | | | |
|---------------|-------------------|--------------|-----------------------|---------------|
| ■ BASF | ■ Dow Chemical | ■ Sinopec | ■ Shell Oil/Chemical | ■ SABIC |
| ■ Exxon Mobil | ■ Lyondell Basell | ■ DuPont | ■ Mitsubishi | ■ Ineos Group |
| ■ Bayer | ■ Air Liquide | ■ AKZO/Nobel | ■ Reliance Industries | ■ Formosa |
| ■ Evonik | ■ Solvay | ■ Linde | ■ Yara | ■ TotPet |
| ■ DSM | ■ DAB Chem | ■ LG Chem | ■ Chevron/Philips | ■ PPG |
| ■ Praxair | ■ Other | | | |

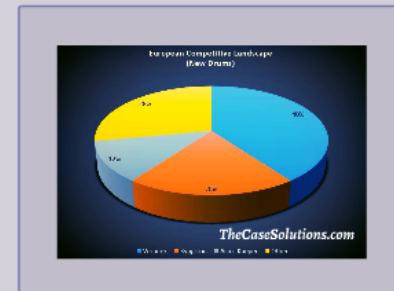


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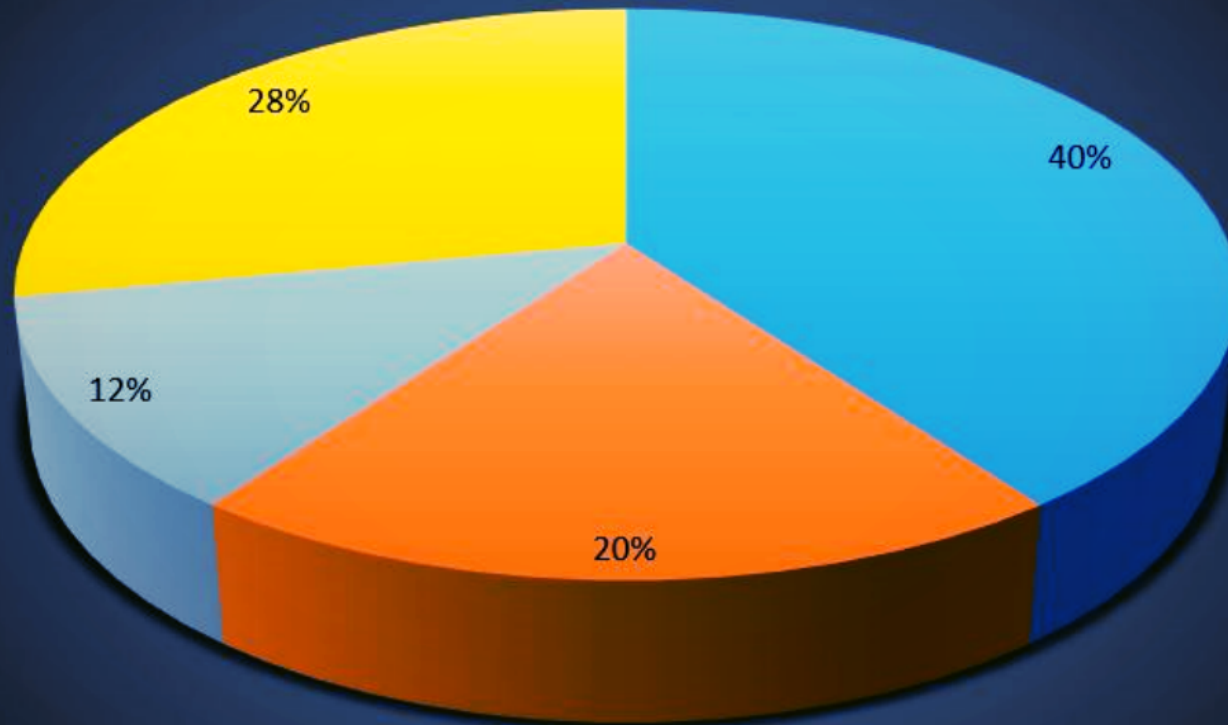
Market Analysis



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European Competitive Landscape (New Drums)



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■ Verbeek ■ Kyngston ■ Acier-Kueper ■ Other

TotPet Overview

- 9th largest oil concern worldwide
- 2012 reached €20 billion in sales
- 5 continents, 80 countries
- Prime profit center is lubricants
- Combination of sales and manufacturing
- 2012 focus on worldwide supply chain

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