





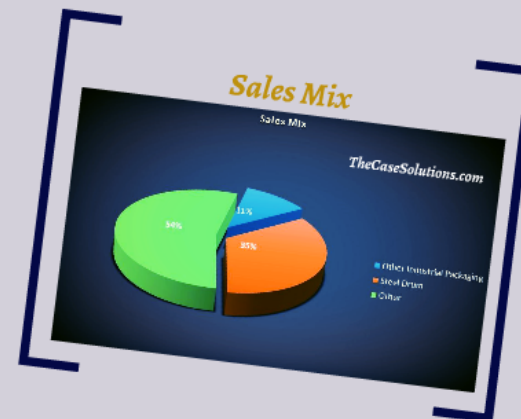
**Verbeek Packaging  
Worldwide (E): The TotPet  
France Account**

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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

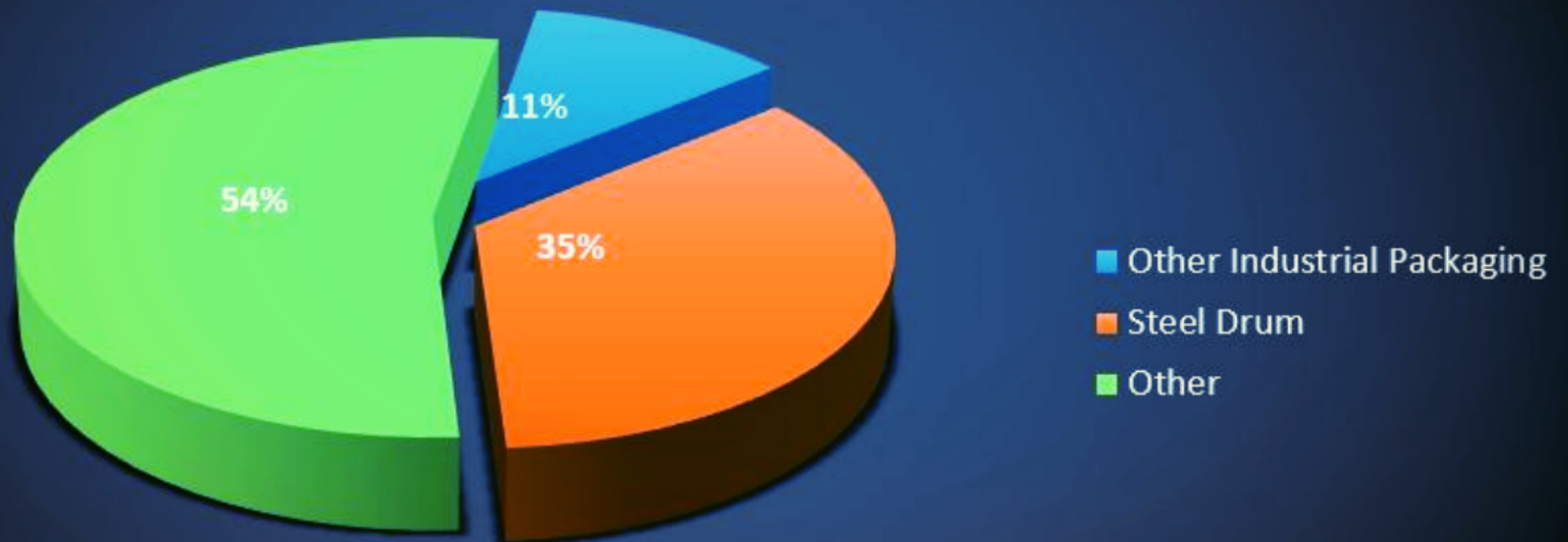
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# *Sales Mix*

Sales Mix

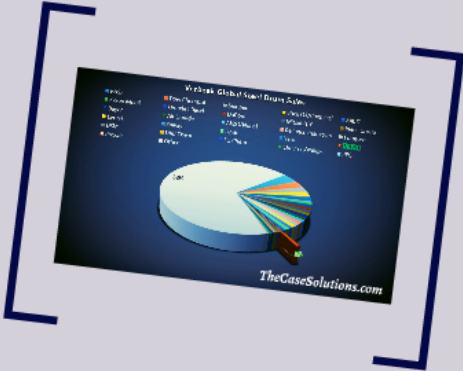
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# Sales Overview

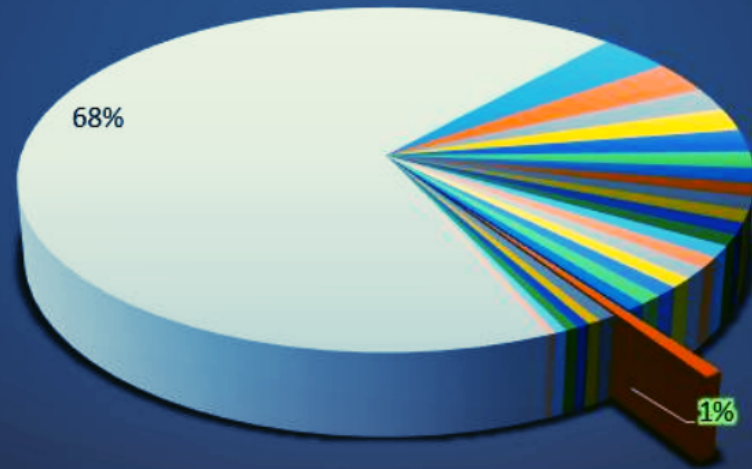


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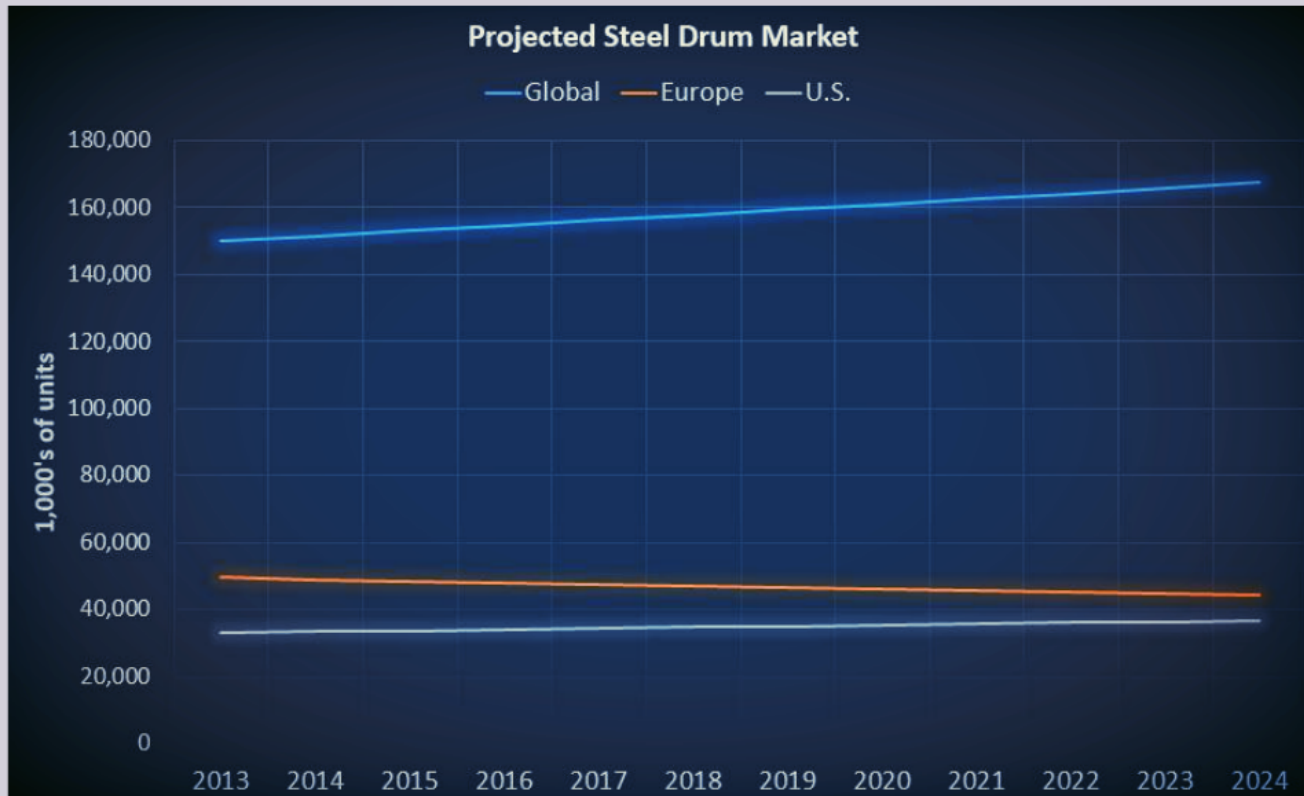
### Verbeek Global Steel Drum Sales

- 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
- Chevron/Philips
- DSM
- DAB Chem
- LG Chem
- Praxair
- Other
- PPG

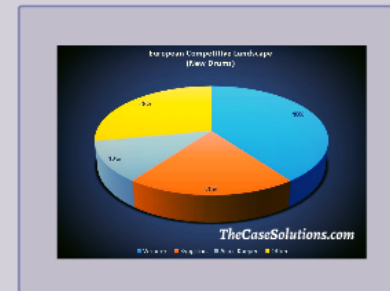


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# Market Analysis

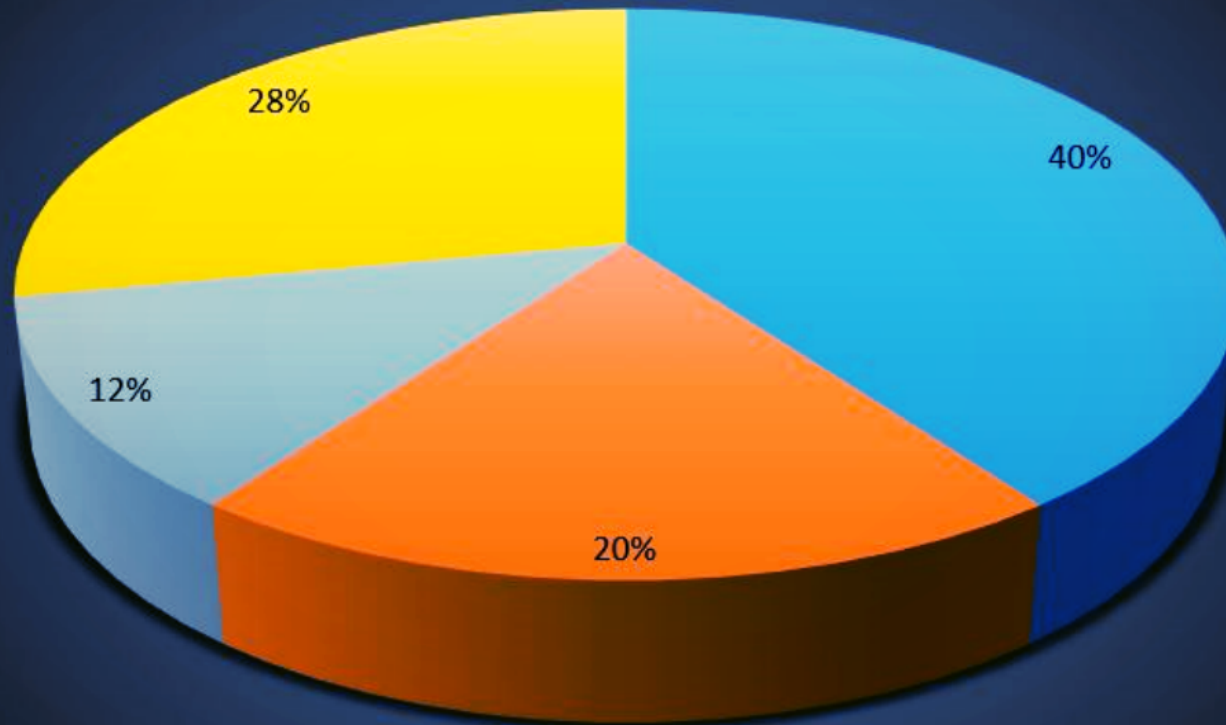


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### European Competitive Landscape (New Drums)



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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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