FY 2018 Results

Analysts’ and Investors’ Conference

March 12, 2019

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Marcus A. Ketter | CFO
Jens M. Wegmann | COO
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In addition to the key figures prepared in accordance with IFRS and German-GAAP respectively, Klöckner & Co SE is presenting non-GAAP key figures such as EBITDA, EBIT, Net Working Capital and net financial liabilities that are not a component of the accounting regulations. These key figures are to be viewed as supplementary to, but not as a substitute for data prepared in accordance with IFRS. Non-GAAP key figures are not subject to IFRS or any other generally applicable accounting regulations. In assessing the net assets, financial position and results of operations of Klöckner & Co SE, these supplementary figures should not be used in isolation or as an alternative to the key figures presented in the consolidated financial statements and calculated in accordance with the relevant accounting principles. Other companies may base these concepts upon other definitions. Please refer to the definitions in the annual report.

Rounding differences may occur with respect to percentages and figures.

The English translation of the Annual Report and the Interim Statement are also available, in case of deviations the German versions shall prevail.

Evaluating statements are unified and are presented as follows:

+/- 0-1% constant
+/- >1-5% slight
+/- >5% considerable
Agenda

1. Highlights and update on strategy
2. Financials
3. Outlook
4. Appendix
01 Highlights FY 2018

- Shipments with 6.1mt on last year's level
- Sales increased by 7.9% yoy to €6.8bn due to higher price level
- Gross profit up from €1,316m in 2017 to €1,328m in 2018
- Gross profit margin decreased to 19.6% after 20.9% in 2018
- EBITDA of €227m as forecasted slightly above last year's level of €220m
- Sales share via digital channels increased from 17% in Q4 2017 to 25% in Q4 2018
- FY guidance: EBITDA Ifl significantly below last year’s level and incl. IFRS 16 slightly above 2018
01 Progress on implementing “Klöckner & Co 2022”

Digitalization and platforms

- Digital sales share increased from 17% in Q4 2017 to 25% in Q4 2018
- Online shops transformed to “Marketplace” for vendors of complementary products, digital consulting established – partnering with Axel Springer
- XOM orders worth around €7m executed by now, internationalization progresses

Higher value-added business

- HVAB sales share improved to 49% in 2018
- Focus 2019: Alu business in Germany and laser technology expansion in the US

Efficency improvement

- Total EBITDA contribution: “One Europe” €30m per year from end of 2019 onwards, “One US” $15m per year from end of 2020 onwards
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02 Shipments/sales and gross profit

- **Shipments** down due to lower volumes in Europe despite healthy demand in the US
- **Sales** increased yoy due to on average higher sales prices

- **Gross profit** Q4 stable yoy
- **Margin** with 18.6% down qoq and yoy due to higher average inventory cost
02 EBITDA in FY 2018

Comments Q4
- Negative volume and price effect of in total €8m mainly due to weaker automotive business
- EBITDA contribution of One Europe and One US of €5m
- OPEX increased mainly driven by shipping cost and supplies
- EBITDA margin 1.9%

Comments FY
- Strong positive price effect due to high prices in the US (Section 232)
- EBITDA contribution of One Europe and One US of €23m
- OPEX increased mainly driven by higher personnel expenses and shipping cost in the USA
- EBITDA margin 3.3%
## 02 Segment performance FY 2018

### Europe (€m)

- **EBITDA FY 2017**: 152
- **Volume effect**: -19
- **Price effect**: -36
- **One Europe**: 16
- **OPEX**: -13
- **F/X**: -2
- **BPO Implementation**: -7
- **EBITDA FY 2018**: 91

### Americas (€m)

- **EBITDA FY 2017**: 94
- **Volume effect**: 25
- **Price effect**: 70
- **One US**: -39
- **OPEX**: -7
- **Deepwater Settlement**: 5
- **EBITDA FY 2018**: 155

### Europe

- **Volume effect** -€19m and **price effect** -€36m – both mainly due to weaker automotive business
- **BPO expense** mainly related to severance provisions
- **EBITDA margin** 2.2%

### Americas

- **Volume effect** of €25m and **price effect** of €70m
- **OPEX** at -€39m mainly due to personnel and shipping-related costs
- **Settlement gain** from 2010 Deepwater Horizon Settlement
- **EBITDA margin** 5.7%
**Cash flow and net debt development**

**Cash flow FY 2018 (€m)**

- EBITDA: 227
- Change in NWC: -65
- Interest: -25
- Taxes: -33
- Gain on sale of non-current assets: -2
- Other: -42
- Cash flow from operating activities: -60
- Capex: -59
- Free cash flow FY 2018: 1

**Comments**

- **Net working capital** increase of €65m
- “Other” mainly relates provisions (pensions, social plans/redundancy programs, etc.)
- **Cash flow from operating activities** +€60m
- **Free cash flow** positive with €1m

**Net financial debt 12/2017 vs. 12/2018 (€m)**

- Net debt 12.2017: 330
- Free cash flow: 1
- Finance lease: -4
- F/X, swaps: -16
- Dividends: -31
- Other: 3
- Net debt 12.2018: 383

- **Net financial debt** increased due to dividends of €31m and also due to F/X translation effects and settlement of F/X swaps of in total €16m
- **Finance lease** relates to a finance lease for equipment (high bay rack) in France
## Maturity profile – well-balanced & diversified funding portfolio

<table>
<thead>
<tr>
<th>Facility</th>
<th>Committed (€m)</th>
<th>Drawn amount (€m, IFRS*)</th>
<th>FY 2018</th>
<th>FY 2017</th>
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<tbody>
<tr>
<td>Syndicated Loan</td>
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<td>ABS Europe</td>
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<tr>
<td>ABS/ABL USA</td>
<td>480</td>
<td>172</td>
<td>157</td>
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<tr>
<td>Convertible 2016</td>
<td>148</td>
<td>138</td>
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<tr>
<td>Bilateral Facilities</td>
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<td>78</td>
<td>91</td>
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<tr>
<td>Finance Leases</td>
<td>26</td>
<td>26</td>
<td>22</td>
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<td><strong>Total Debt</strong></td>
<td><strong>1,425</strong></td>
<td><strong>524</strong></td>
<td><strong>484</strong></td>
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<td>Cash</td>
<td>141</td>
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<tr>
<td><strong>Net Debt</strong></td>
<td><strong>383</strong></td>
<td></td>
<td></td>
<td><strong>330</strong></td>
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**€m**

<table>
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<th>FY 2018</th>
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<td>Adjusted equity</td>
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<tr>
<td>Leverage</td>
<td>1.7x</td>
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<td>Gearing</td>
<td>31%</td>
</tr>
</tbody>
</table>

Maturity profile of committed facilities & drawn amounts (€m)

Left side: committed facilities
Right side: utilization (nominal amounts)

*) Including interest accrued, excluding deferred transaction costs.

1) Principal €148m, equity component €18m at issuance (September 8, 2016).
2) Mainly Switzerland.
3) Net debt/Equity attributable to shareholders of Klöckner & Co SE less goodwill from business combinations subsequent to May 23, 2013.
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03 Region specific business outlook 2019

Europe
~1%

Real steel demand

Construction industry

Manufacturing, machinery and mechanical engineering, etc.

Energy industry

Automotive industry

Shipbuilding

US
1-2%

Europe

Construction industry

Manufacturing, machinery and mechanical engineering, etc.

Energy industry

Automotive industry

Shipbuilding

US

Construction industry

Manufacturing, machinery and mechanical engineering, etc.

Energy industry

Automotive industry

Shipbuilding
03 Outlook

- **Q1 2019**
  - Seasonally higher sales anticipated

- **FY* 2019**
  - Considerably higher sales anticipated due to higher average price level
  - EBITDA ifl significantly below last year’s level and incl. IFRS 16 slightly above 2018

Reported **EBITDA** to be between €20-30m (incl. IFRS 16)

*for expected IFRS 16 effects see appendix.*
Agenda

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## Quarterly and FY results

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<thead>
<tr>
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<td>1,605</td>
<td>1,584</td>
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<td>6,135</td>
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<td>6,292</td>
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<td>-172</td>
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<td>18.9</td>
<td>20.3</td>
<td>20.4</td>
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<td>19.8</td>
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<td>101</td>
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<td>0.34</td>
<td>-0.13</td>
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<td>444</td>
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<td>1,132</td>
<td>1,120</td>
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## 04 Segment performance

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<th>Shipments (Tto)</th>
<th>Sales (€m)</th>
<th>EBITDA adj*) (€m)</th>
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<tbody>
<tr>
<td><strong>Europe</strong></td>
<td></td>
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<tr>
<td>Q4 2016</td>
<td>867</td>
<td>883</td>
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<tr>
<td>Q1 2017</td>
<td>926</td>
<td>985</td>
</tr>
<tr>
<td>Q2 2017</td>
<td>911</td>
<td>1,019</td>
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<tr>
<td>Q3 2017</td>
<td>896</td>
<td>999</td>
</tr>
<tr>
<td>Q4 2017</td>
<td>901</td>
<td>1,032</td>
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<tr>
<td>Q1 2018</td>
<td>885</td>
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<td>Q2 2018</td>
<td>827</td>
<td>1,014</td>
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<tr>
<td>Q3 2018</td>
<td></td>
<td>934</td>
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<td>Q4 2018</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Americas</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q4 2016</td>
<td>583</td>
<td>515</td>
</tr>
<tr>
<td>Q1 2017</td>
<td>657</td>
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<td>Q2 2017</td>
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<td>643</td>
<td>566</td>
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<tr>
<td>Q4 2017</td>
<td>627</td>
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<tr>
<td>Q1 2018</td>
<td>683</td>
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<tr>
<td>Q2 2018</td>
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<td>740</td>
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<td>Q3 2018</td>
<td></td>
<td>685</td>
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<td>Q4 2018</td>
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- *) adjusted for BPO expenses in Q2 2018.
- **) adjusted for Deepwater Horizon Oil Spillage Claim Settlement gain in Q2 2018.
## IFRS 16 impact

<table>
<thead>
<tr>
<th>Key Figure</th>
<th>€m</th>
<th>Tendency</th>
<th>Comment</th>
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<td>Sales</td>
<td>-</td>
<td></td>
<td>No impact</td>
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<td>OPEX</td>
<td>~45 – 50</td>
<td></td>
<td>Recognition of lease expenses as depreciation and interest costs; exception: short-term leases and low-value assets, remaining material costs</td>
</tr>
<tr>
<td>EBITDA</td>
<td>~45 – 50</td>
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<td>Lower leasing expenses</td>
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<tr>
<td>D&amp;A</td>
<td>~40 – 45</td>
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<td>Capitalized operating-lease-assets as new depreciation</td>
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<td>EBIT</td>
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<td></td>
<td>Depreciation and interest instead of operating lease expense</td>
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<td>Financing costs</td>
<td>~-6 – -8</td>
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<td>Interest cost included in finance cost</td>
</tr>
<tr>
<td>Operating and free cash flow</td>
<td>~ 40</td>
<td></td>
<td>Principal payments on IFRS 16 lease liabilities included in cash flow from financing activities</td>
</tr>
</tbody>
</table>

Main impact consists of considerable **EBITDA and free cash flow increase**
04 Strong balance sheet

**Comments**
- Equity ratio further healthy at 42%
- Net debt of €383m
- Leverage 1.7x
- Gearing*) at 31%
- NWC stable at €1,129m (2017: €1,132m)

*) Gearing = Net debt/Equity attributable to shareholders of Klöckner & Co SE less goodwill from business combinations subsequent to May 23, 2013.
04 Sales by markets, products and industries

Sales by markets

- 39% USA
- 29% Germany/Austria
- 15% Switzerland
- 9% France/Belgium
- 4% UK
- 1% Brazil

Sales by products

- 48% Flat products
- 19% Long products
- 9% Quality steel/Stainless steel
- 8% Aluminum
- 5% Tubes
- 11% Others

Sales by industry

- 40% Construction industry
- 27% Machinery/Mechanical engineering
- 13% Automotive industry
- 8% Household appl./Consumer goods
- 8% Local dealers
- 4% Miscellaneous

As of December 31, 2018.
04 Current shareholder structure

Geographical breakdown of identified institutional investors

- 6% Rest of EU
- 3% Rest of world
- 1% Switzerland
- 1% France
- 3% UK
- 34% US
- 52% Germany

Comments

- Identified institutional investors account for 72%
- German investors incl. retail dominate
- Top 10 shareholdings represent around 55%
- Retail shareholders represent 23%

As of February 2019.
In the first half of 2018, the Klöckner & Co share price moved mainly sideways, reaching its annual high of €11.62 on April 23.

The share repeatedly suffered price setbacks thereafter.

In October, the share price fell sharply and reached its low for the year of €5.98 on December 27 in a negative capital market environment due to the deteriorating economic outlook and more pessimistic steel price expectations.

The share traded at a price of €6.06 on the last trading day of 2018 (December 28).
In general, Klöckner & Co SE follows a dividend policy of distributing 30% of net income before special items. Given the volatility of our business model, a sustainable dividend payment can not be guaranteed. If there is a possibility of dividend distribution, we will do it for the benefit of our investors.

- Compliance with the dividend policy of €0.80 per share for the years 2006 and 2007
- Suspension of the dividend policy for the financial year 2008 in view of the beginning of the Euro crisis and no dividend payment
- Due to earnings no dividend payment in 2009
- Inclusion of our general dividend policy in financial year 2010 with a dividend of €0.30 per share
- Due to earnings no dividend payment in 2011, 2012 and 2013 as well as in 2015
- Full distribution of net profit for the financial year 2014 (€0.20 per share)
- Dividend payment of €0.20 per share in 2016 and €0.30 per share for the 2017 fiscal year
- Dividend per share for the 2018 fiscal year: €0.30*)

* Proposal to the Annual General Meeting on May 15, 2019.

DIVIDEND PAYMENT PER SHARE

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>€0.80</td>
<td>€0.80</td>
<td>-</td>
<td>€0.30</td>
<td>-</td>
<td>€0.20</td>
<td>-</td>
<td>€0.20</td>
<td>€0.30</td>
<td>€0.30*</td>
</tr>
</tbody>
</table>
04 Sustainability strategy

A qualified and motivated workforce of employees who feel at ease in the workplace pave the way for us to generate added value.

An integral part of our corporate culture is compliance on the part of our employees and business partners, constituting the basis of corporate responsibility.

One of the greatest challenges of our times is climate change, and we consider it our duty to counter related risks with a suitable contribution to protecting the environment.

In many cases today's tasks have increased in complexity. The measures developed by us therefore aim at anchoring modern, digital ways of working and thinking in the company and thus to advance the internal cultural change.

The high level of customer satisfaction - which we aim to continue improving - is a key competitive advantage for us. Therefore we always conceptualize products and services, sales channels and innovations from the customer perspective.
### Contact details

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Internet: www.kloeckner.com

### Financial calendar

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>April 30, 2019</td>
<td>Q1 quarterly statement 2019</td>
</tr>
<tr>
<td>May 15, 2019</td>
<td>Annual General Meeting 2019</td>
</tr>
<tr>
<td>July 31, 2019</td>
<td>Half-yearly financial report 2019</td>
</tr>
<tr>
<td>October 30, 2019</td>
<td>Q3 quarterly statement 2019</td>
</tr>
</tbody>
</table>