



Winning in the market
with FrieslandCampina as your partner

Tuncay Özgüner | October, 5th 2018

Introduction

Ahold Delhaize
Coffee Company



Ahold
Delhaize



ams
creating synergy

MIGROS ICA



KESKO



Dansk
Supermarkedt
NETTO fetex Bilka

ESSELUNGA



Système U



FrieslandCampina



UK



Spain Italy France



FM EU



Americas & Pacific



Global Accounts & Trade

FrieslandCampina's long-term aspiration



nourishing by nature

Better nutrition for the world, a good living for our farmers, now and for generations to come

Aspiration 2020



Achieve around **5%** annual volume growth in the selected priority product market combinations



Process and valorise around **10** billion kilos of milk from the member dairy farmers in product market combinations that add the most value



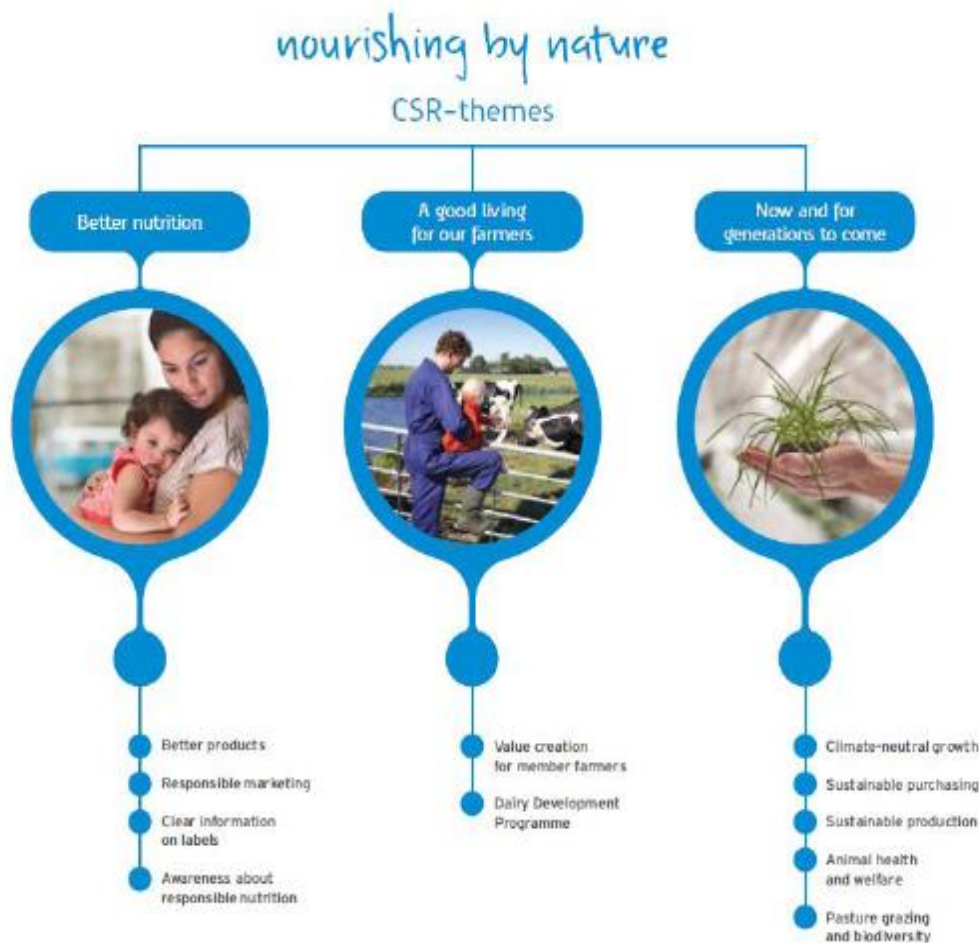
Grow to **15** billion euro revenue in 2020



Be financially healthy and in harmony with nature and society in the short term and in **20** years' time in order to also create value for the following generations of dairy farmers

RFC is serious about Nourishing by nature

And our brands are too!



FrieslandCampina at a glance



12,707 member dairy farms



REVENUE

12.1

BILLION EUROS

23,675
EMPLOYEES



MILLIONS OF
CONSUMERS
EACH AND
EVERY DAY



BRANCH OFFICES
IN 34
COUNTRIES



Europe
revenue* 6,863
employees 12,981



Asia and Oceania
revenue* 3,834
employees 9,518



Africa and the Middle East
revenue* 976
employees 1,010



North and South America
revenue* 437
employees 166



EXPORT TO
MORE THAN



100
COUNTRIES

THE 18,645
MEMBER DAIRY FARMERS
OWN THE COMPANY



The power of the milk chain and the Dutch heritage



Leverage the Dutch dairy heritage and unique milk chain in a sustainable way to win the hearts and minds of our customers and consumers



Milk production by
member dairy farmers

Processing into
dairy products and
ingredients

Global distribution,
marketing and sales



**moving FrieslandCampina
fast forward**



**WIN
WIN**

Provide better nutrition
for the world

Realise a good living for farmers

Act for now and
generation to come

Purpose
driven

Put consumers and customers first

Make fighting units leading

Move with speed and decisiveness

Commercially
obsessed

Spend on big rocks

Be prudent on cost

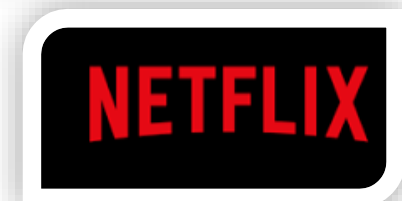
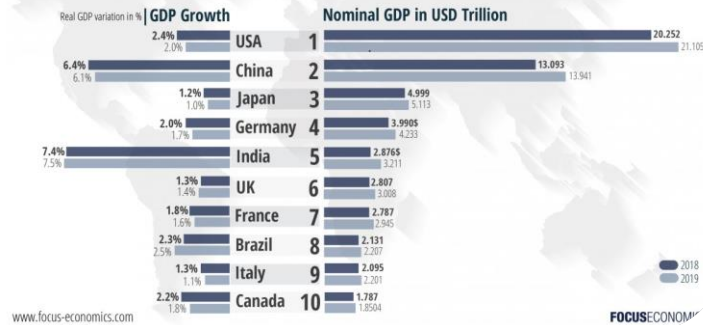
Use kitchen table pragmatism

Owners'
mindset

WIN-WIN

The challenges of expanding a business in Italy may be as tough as rewarding

TOP 10 The World's Biggest Economies for 2018 and 2019



Our ambition is to become the cool
sustainable dairy company



PLAY SIMPLY-ACCESSIBLE

SURF ON WHAT WE DO WELL



NATURAL GOODNESS EXPERT

BE A TRUSTED PARTNER FOR RETAILERS

Look back to look forward



#1: New office and project team



#2: A new disruptive way of working



#3: Ruthlessly focused



#4: Born digital and agile



Winning in the market

We can only do it with you

Putting customers and consumers first





Thank You

So let's go, let's grow together