



CRH

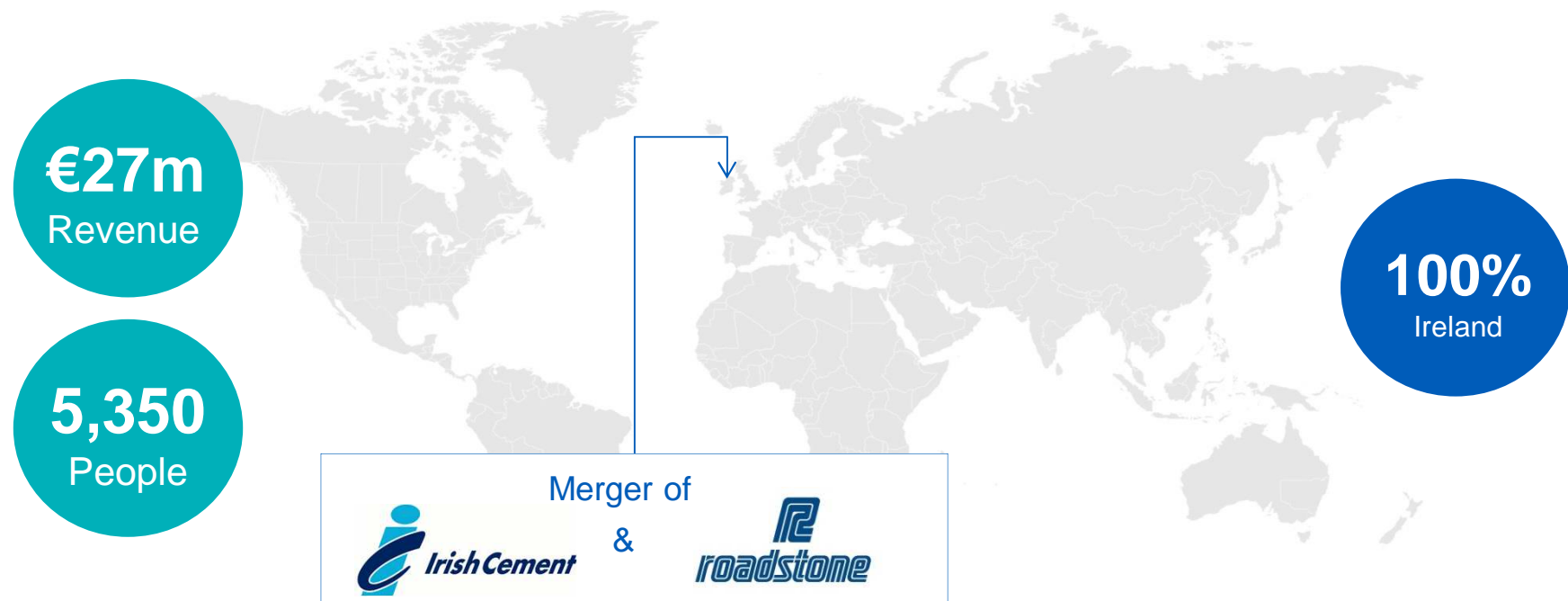
# IPHA Annual Conference

Budapest

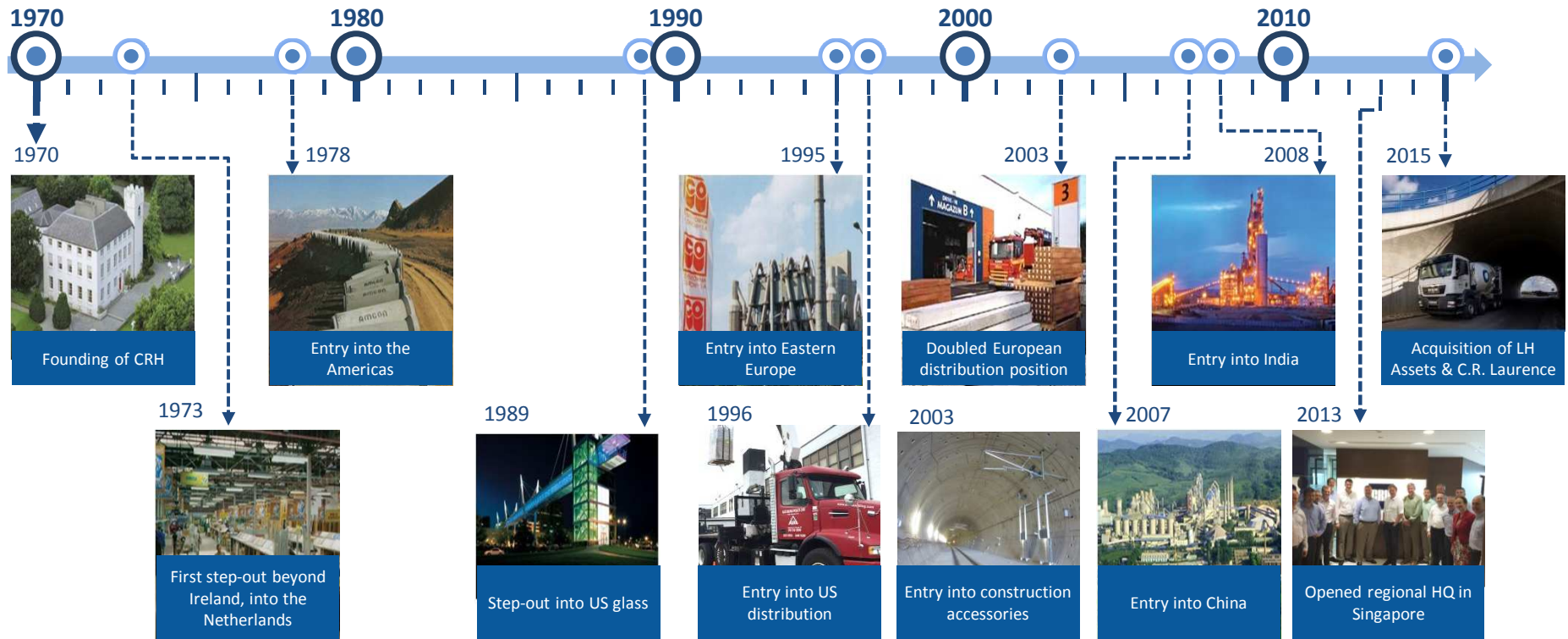
Otto Magera | [27] May 2016

# About CRH

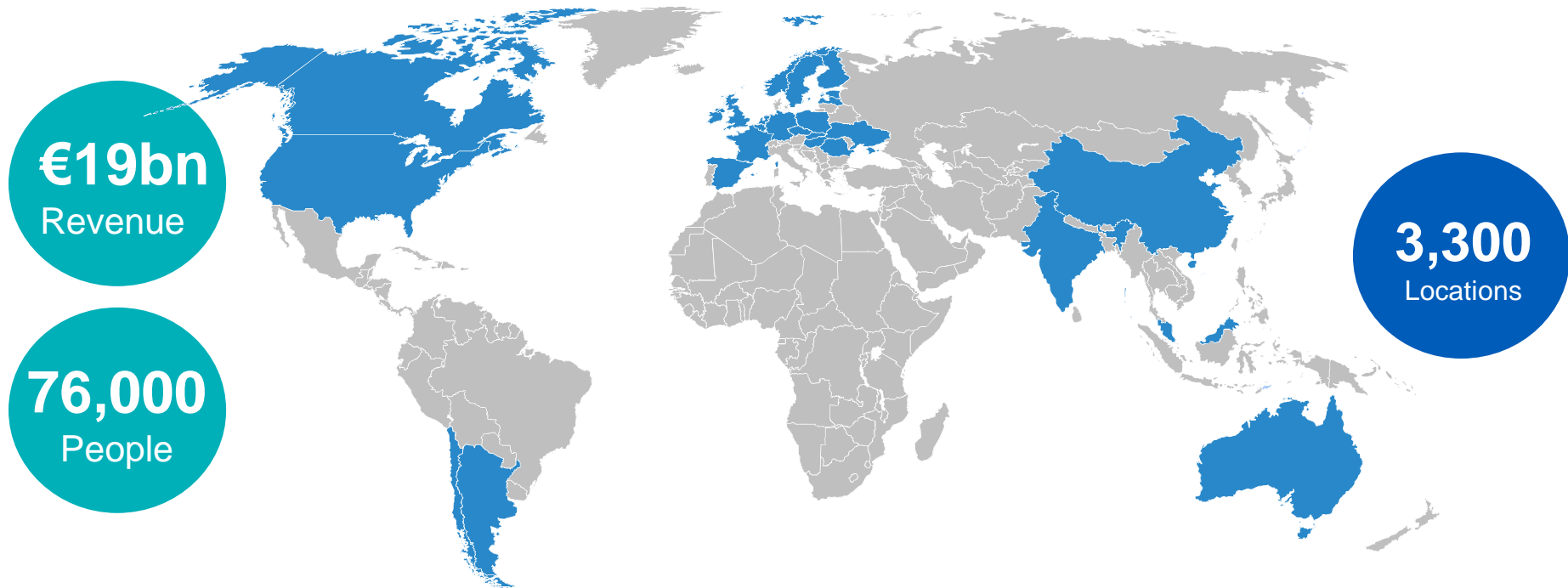
## 1970 ... From small local beginnings



# ...through a proud and successful history...

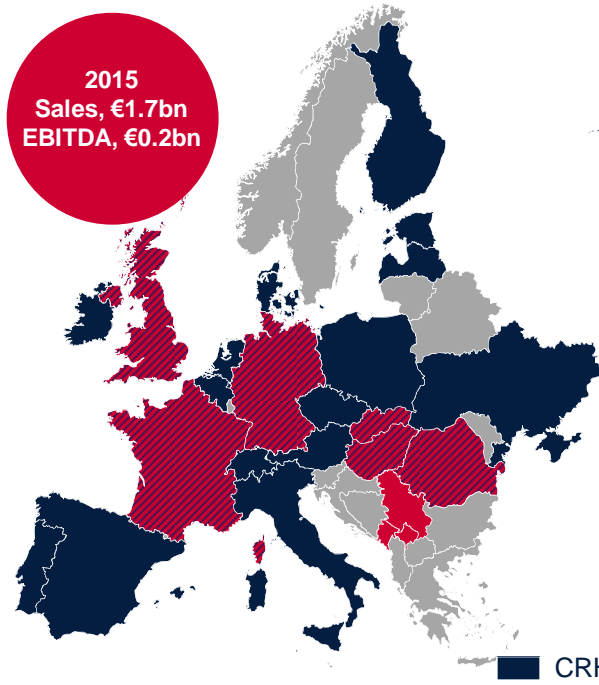


## ... End of 2014

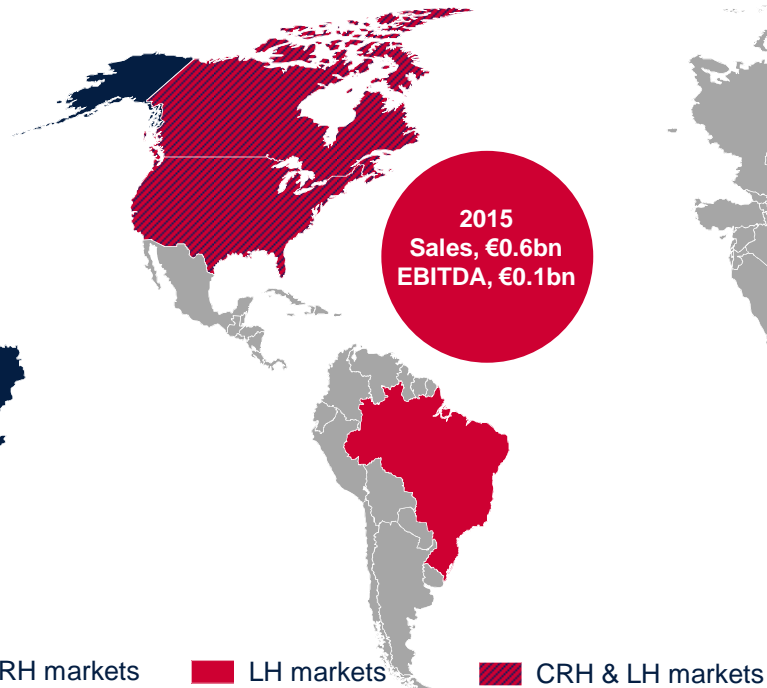


# 1 global deal ... 4 regional platforms

## Western Europe & CEE



## Americas



## Asia

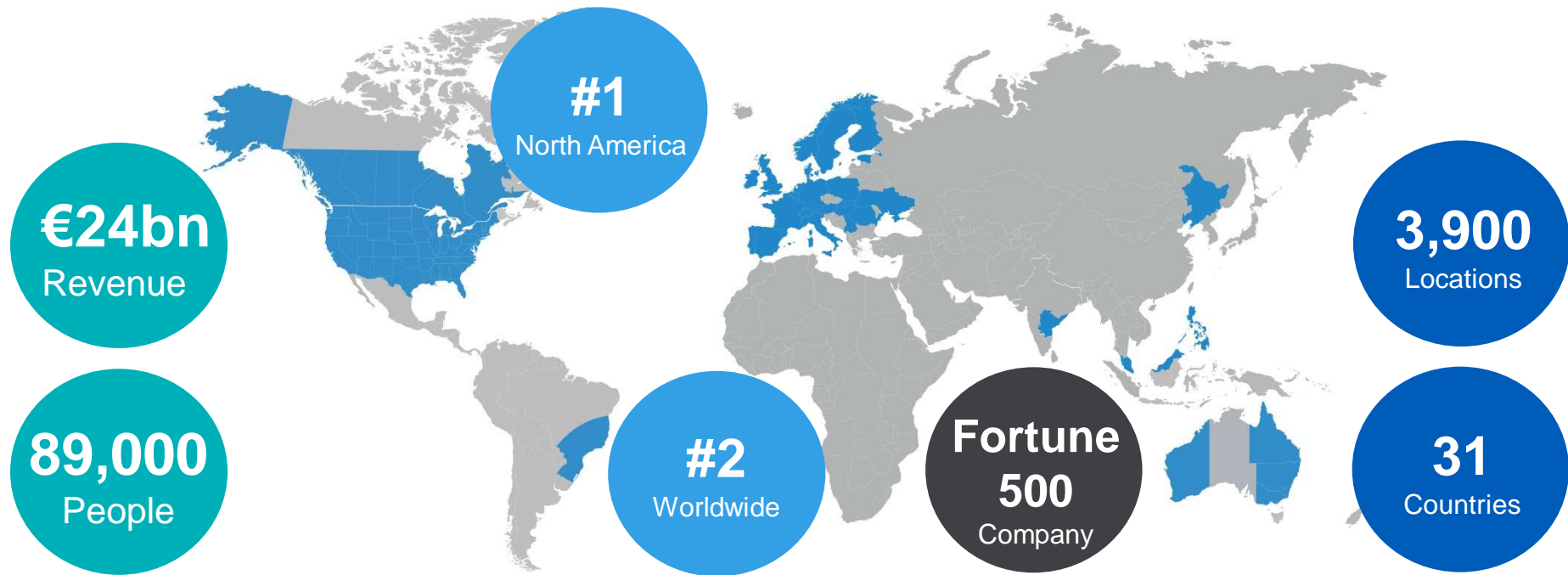


## Leading Market Position in 4 Regional Platforms

| Region                   | Country   | Cement | AGG | RMC | Asphalt |
|--------------------------|---|--------|-----|-----|---------|
| The Americas             |  Canada / US   | √      | √   | √   | √       |
|                          |  Brazil        | √      |     | √   |         |
| Western Europe           |  UK            | √      | √   | √   | √       |
|                          |  France        | √      | √   | √   |         |
|                          |  Germany       | √      |     | √   |         |
|                          |  Romania       | √      | √   | √   |         |
| Central & Eastern Europe |  Slovakia      | √      | √   | √   |         |
|                          |  Hungary       | √      |     | √   |         |
|                          |  Serbia       | √      | √   |     |         |
| Asia                     |  Philippines | √      | √   |     |         |

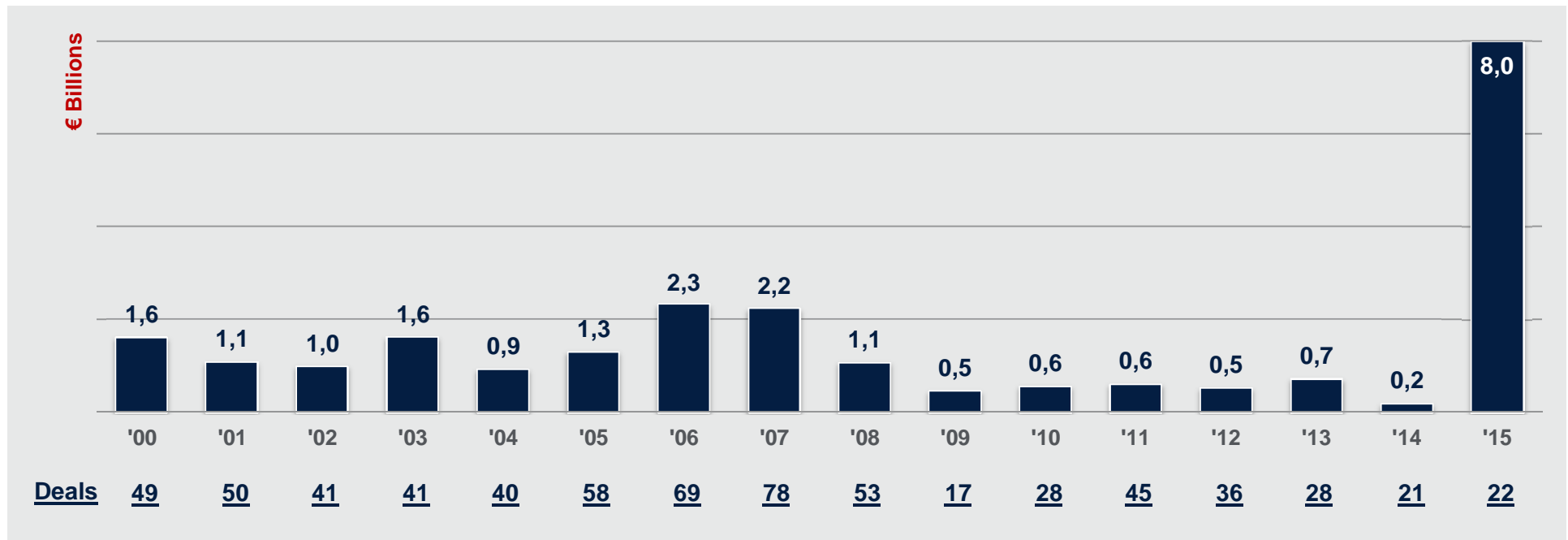


## 2016 ... to a strong global company





## CRH ... A Highly Acquisitive Company



# CRH in N.Danube - OneCRH



**CRH NORTH DANUBE**  
Cement, Aggregates, RMC



Road & Rail Logistics



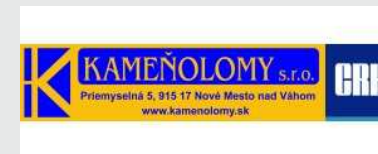
Paving, Concrete Products



Concrete Elements & Assembly



Building Materials



Stone Quarries



Services



Alternative Fuels Sourcing & Processing



# CRH in N.Danube

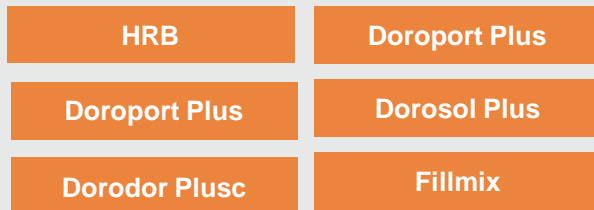
Plant Turna



Plant Rohozník



Cement Manufacturing - bag



Special Binders

| FLOORPACT    | STEELPACT      | ARTICIMO |
|--------------|----------------|----------|
| FLOOR MASTER | FROST MASTER   |          |
| PILE MASTER  | HYDRO MASTER   |          |
| HOME MASTER  | COLOR MASTER   |          |
| FIBRE MASTER | AGRI MASTER    |          |
| LIGHT MASTER | FILL MASTER    |          |
| SELF MASTER  | SHOT MASTER    |          |
| TIME MASTER  | EXPOSED MASTER |          |

Ready-mix



# CRH in N.Danube



## Concrete Elements & Assembly

### Design / Production & Construction

|                   |  |                    |  |
|-------------------|--|--------------------|--|
| Beams             |  | Pillars            |  |
| Bridge Elements   |  | Precast Foundation |  |
| Hollow core Slabs |  | Road Building      |  |
| Housing Products  |  | Electricity Poles  |  |
| Railway Products  |  |                    |  |



## Road & Rail Logistics

|                           |                         |
|---------------------------|-------------------------|
| RAILWAY TRANSPORTATION    |                         |
| RAILWAY WAGON LEASING     |                         |
| OTHER SERVICES            |                         |
| RAILWAY WAGON MAINTENANCE | ECM SERVICE / MAINT MGT |
| LOGISTIC SOLUTIONS        |                         |



## Paving, Concrete Products

|                   |                  |        |
|-------------------|------------------|--------|
| PRODUCTS          |                  |        |
| Pavers            | Tiles            | Fence  |
| Walling           | Accessories      | Blocks |
| Services          |                  |        |
| Transport         | Customer Support |        |
| Technical Support |                  |        |

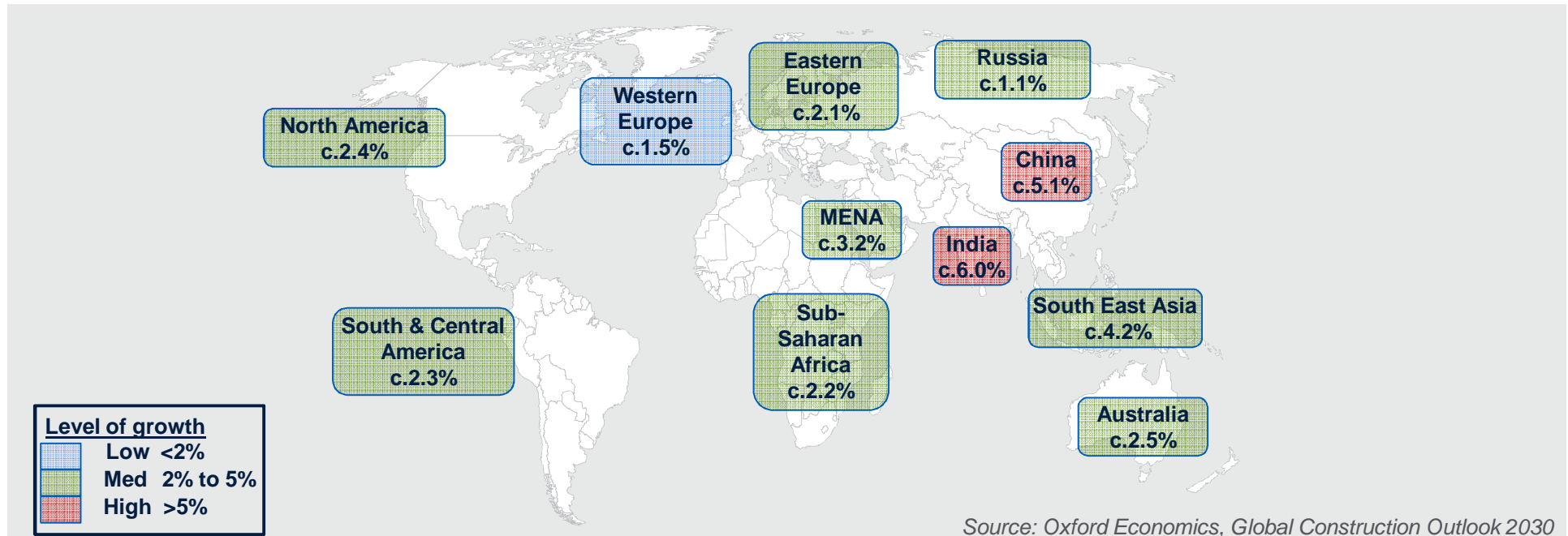


# Global Building Materials Outlook

13 | Otto Magera | [27] May 2016

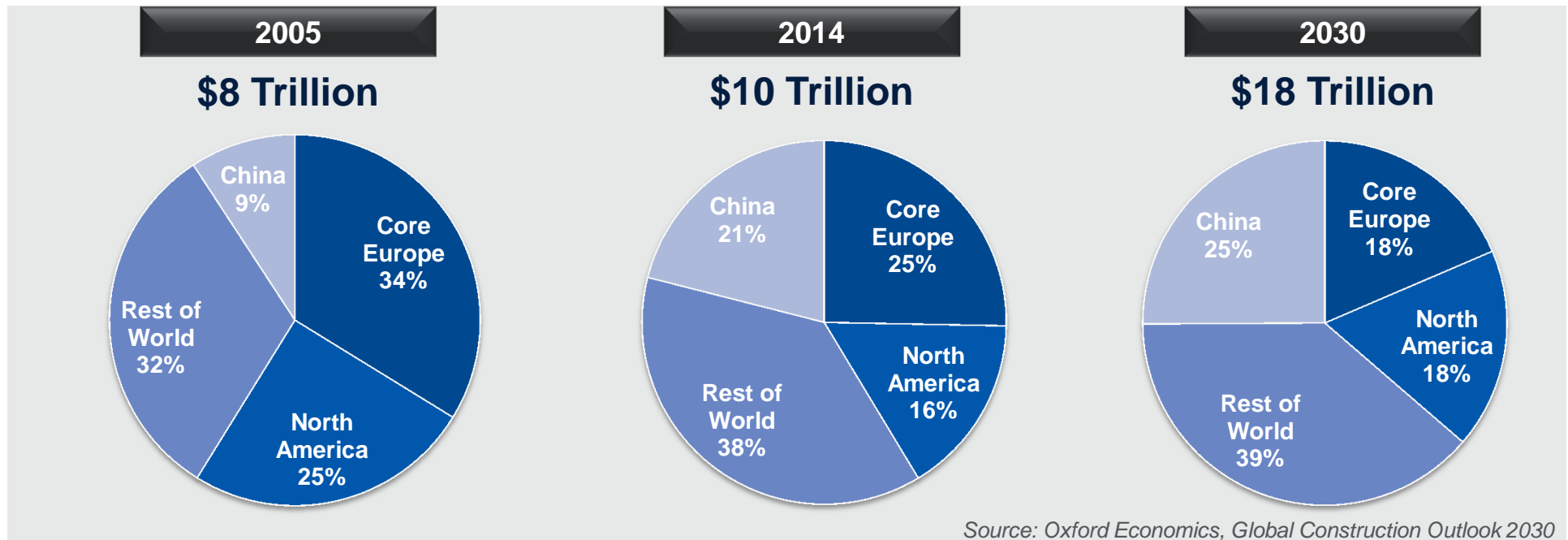
2

# Projected GDP Growth (Avg. 2014-2030)



... Developing markets driving future global economic growth ...

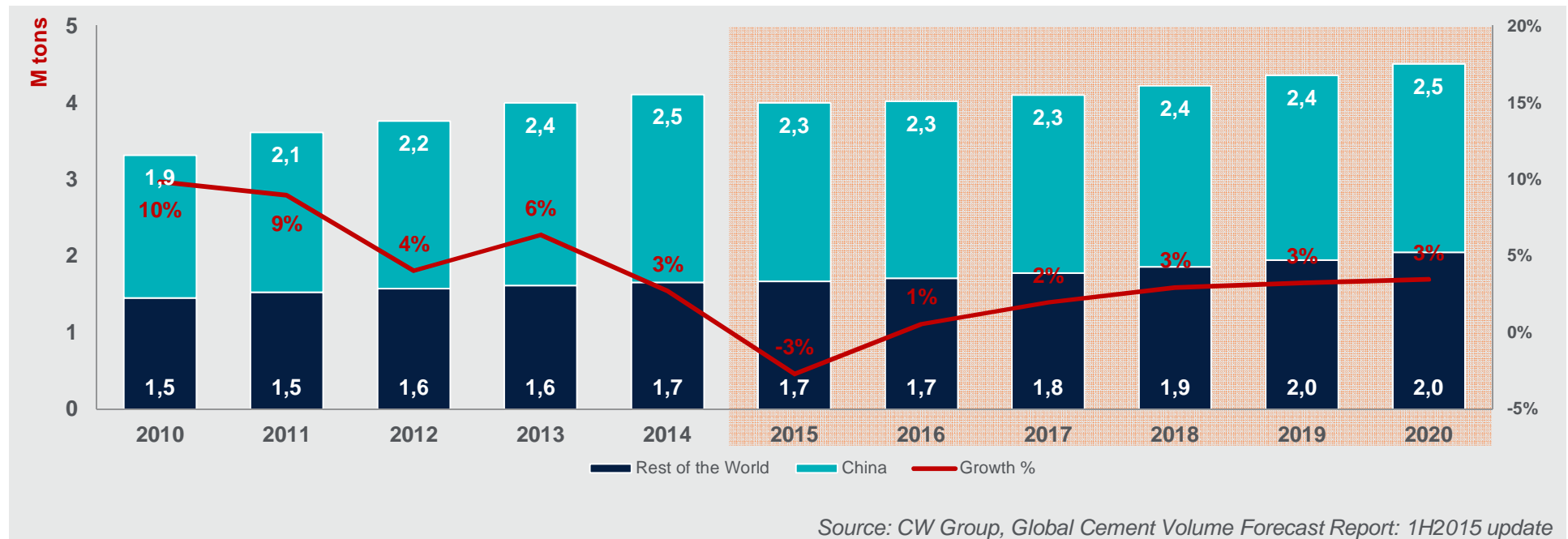
# Global Construction Spend



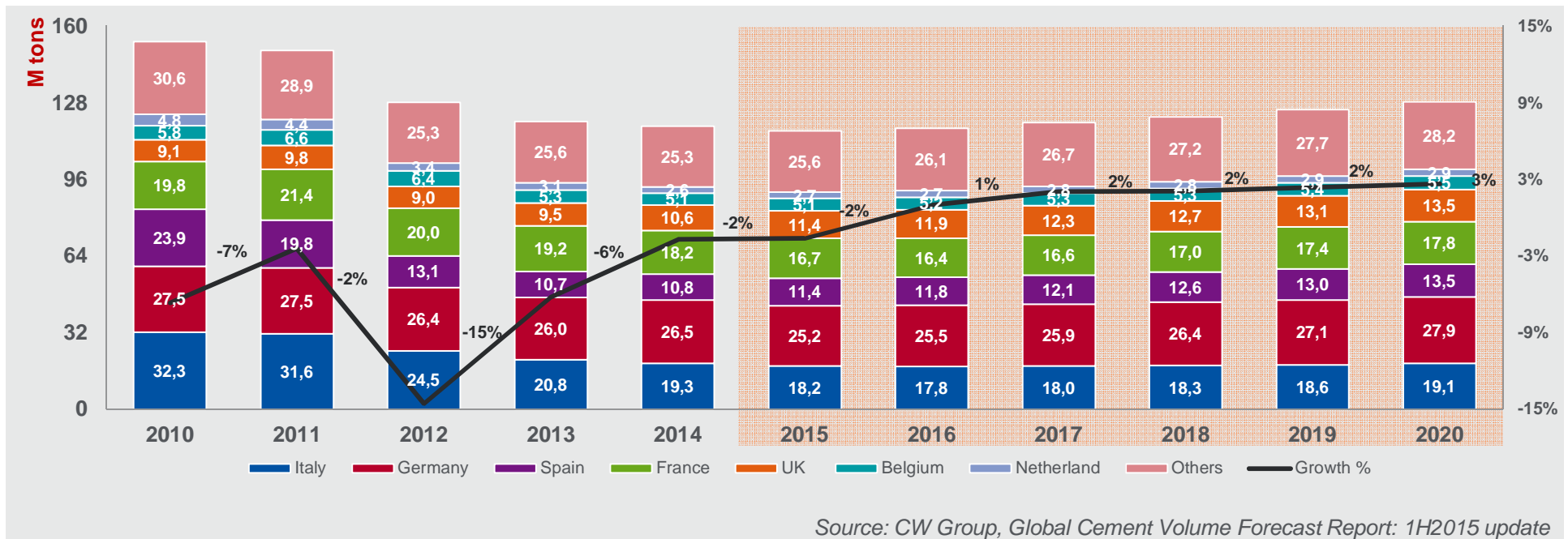
**... Global construction spend will increase over 80% by 2030 ...**



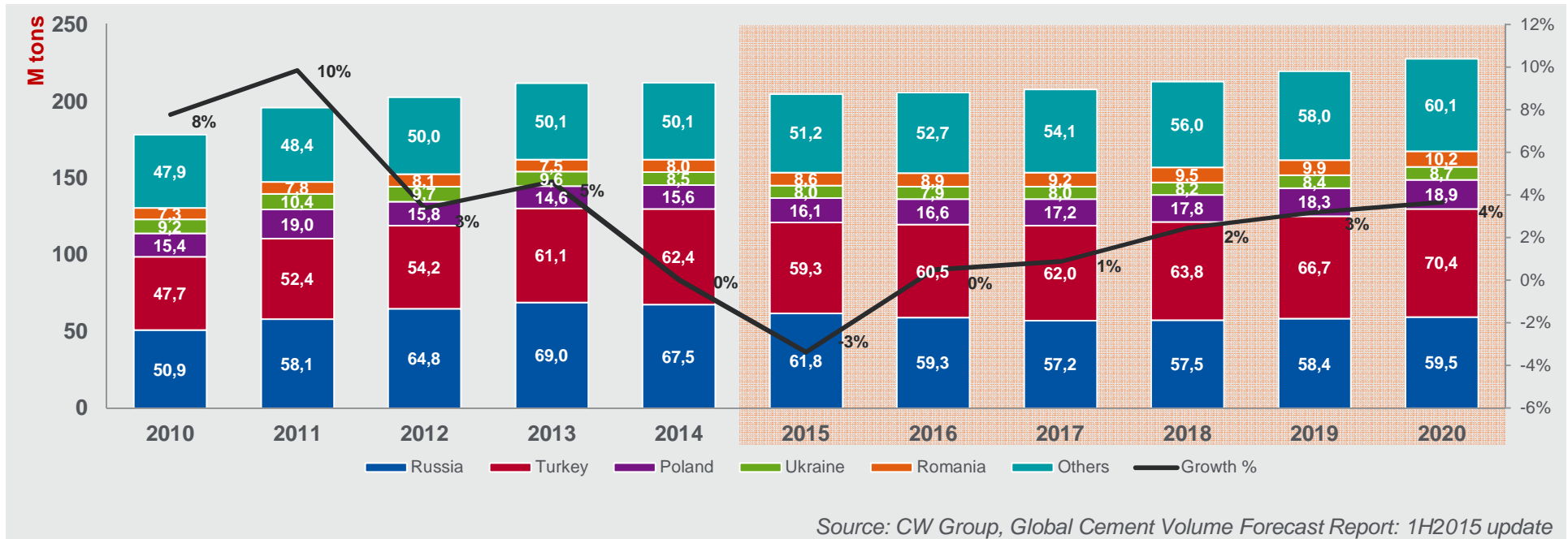
# Global Cement Consumption Volume Forecasts



# Western Europe Cement Consumption Volume Forecasts



# Eastern Europe Cement Consumption Volume Forecasts



# CRH ... The Future

# Our Vision ... To be the leading building materials business in the world ...

**Diversified**  
Building Materials

**Proven**  
Business Model

**Vertically Integrated**  
Heavyside Businesses

**Strong**  
Balance Sheet

**Balanced**  
Sector & End Use Exposure

**BBB+**  
Investment Grade

# Thank you

