

# Agenda

## Welcome

Ingrid Yllmark, IRO

## The strategic direction

Preben Bager, CEO

## COMMERCIAL

Attractive offerings and distinct brands

Poggenpohl

Magnet

HTH

Hygena

The B2B market and category management

Preben Bager, CCO

Elmar Duffner

Peter Kane

Henrik Karup Jørgensen

Nick Friend

Nick Friend

## OPERATIONS

Delivering world-class kitchens

Range

Production

Sourcing and logistics

Göran Westerberg, COO

Björn Block

Ingemar Tärnskär

Mats Rignell

## Summing up

Preben Bager

## Q & A

## Cocktails



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# The strategic direction

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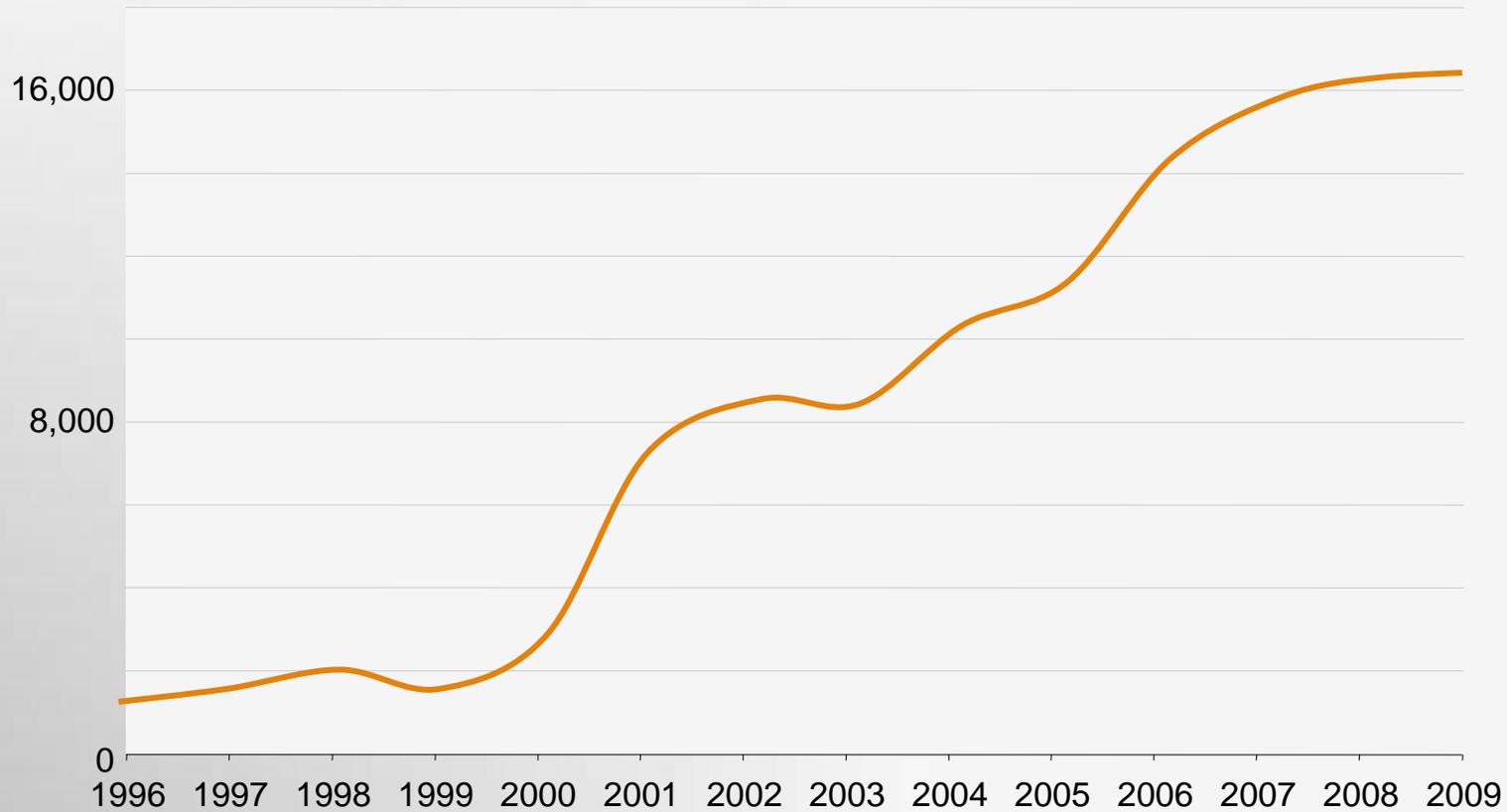
# The world-class kitchen specialist

Our vision



# Four-fold growth in 10 years

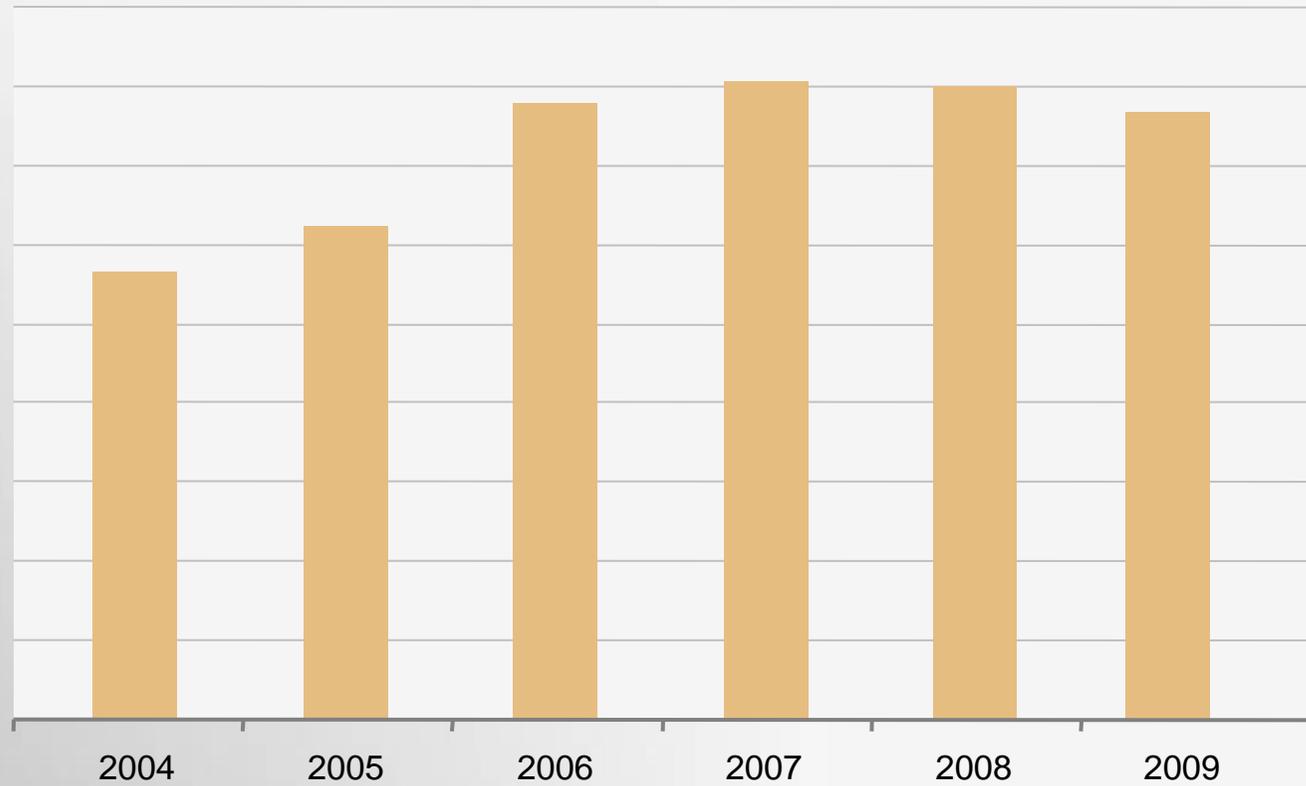
Net sales, SEK m



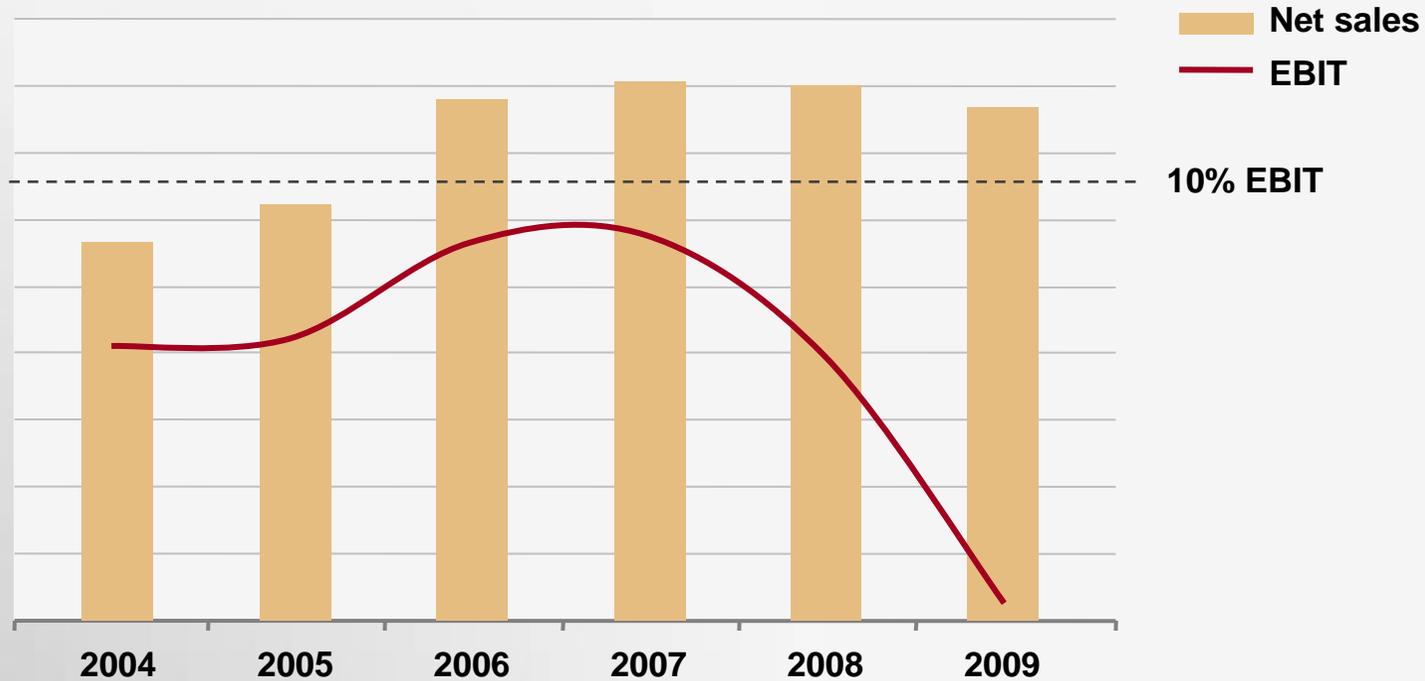
Excluding currency differences

# Growth has stagnated

Net sales



# Margins must improve



# Challenges ahead



How can we better reach and serve our customers?



How can we become more efficient?

# Current brand fit per segment

Economy	Middle	Luxury	
Gower			
Optifit			
Interior Solutions			
			
			
			
			

## Challenges



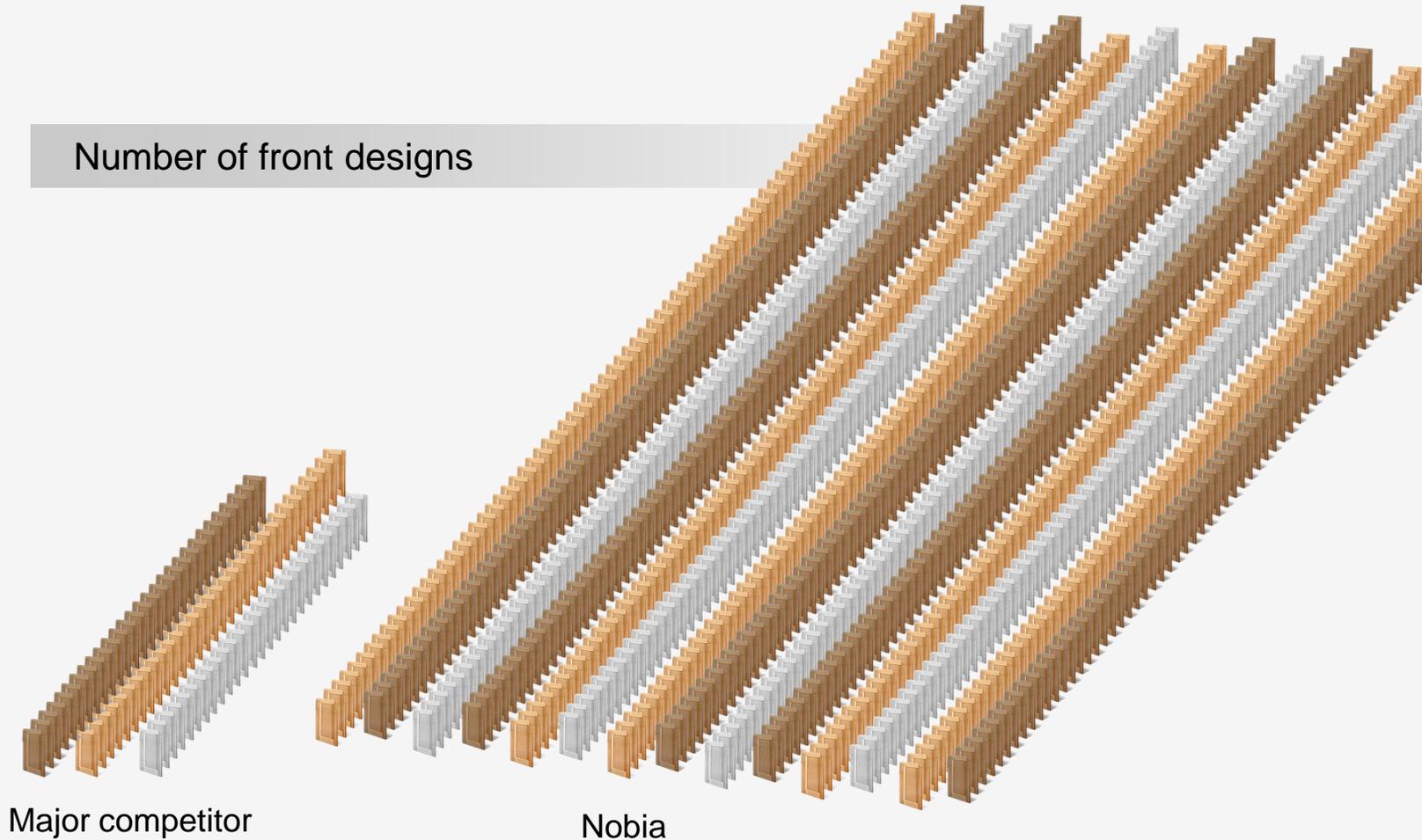
How can we better reach and serve our customers?



How can we become more efficient?

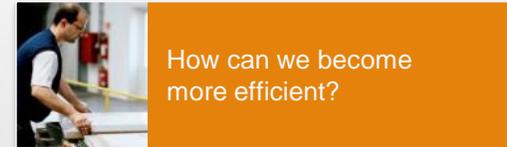
# Complexity drives cost

Number of front designs



*Sourcing a wide and highly complex range is inefficient and costly*

## Challenges



# Strategic direction



# How do we achieve the required result?

## Required results

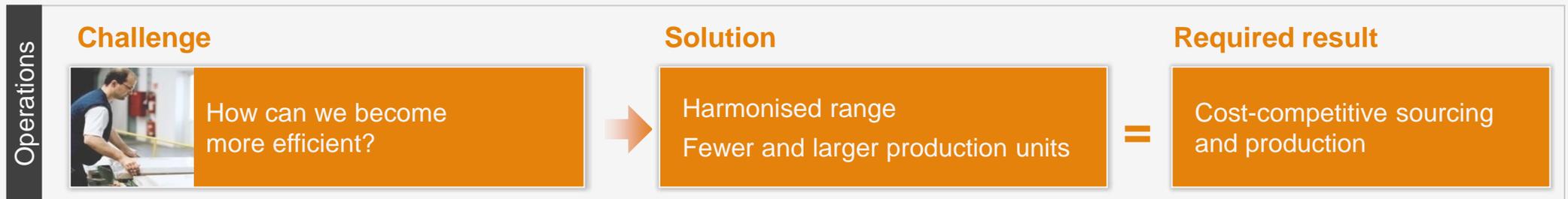
Clear brands with attractive, competitive offers  
More sales

Cost-competitive sourcing and production

Economy	Middle	Upper middle	Luxury
<ol style="list-style-type: none"> <li>1. Scalable concepts</li> <li>2. Clear brand strategy</li> <li>3. Strengthened product development</li> </ol>			



# Strategic direction



A stronger Nobia

# How do we achieve the required result?

- Common range platforms – cut number of SKUs in half
- Fewer and larger production units serving several brands
- Increased sourcing from low-cost countries
- More efficient investments

## Required results

Clear brands with attractive, competitive offers  
More sales

Cost-competitive sourcing and production



## Organisational split



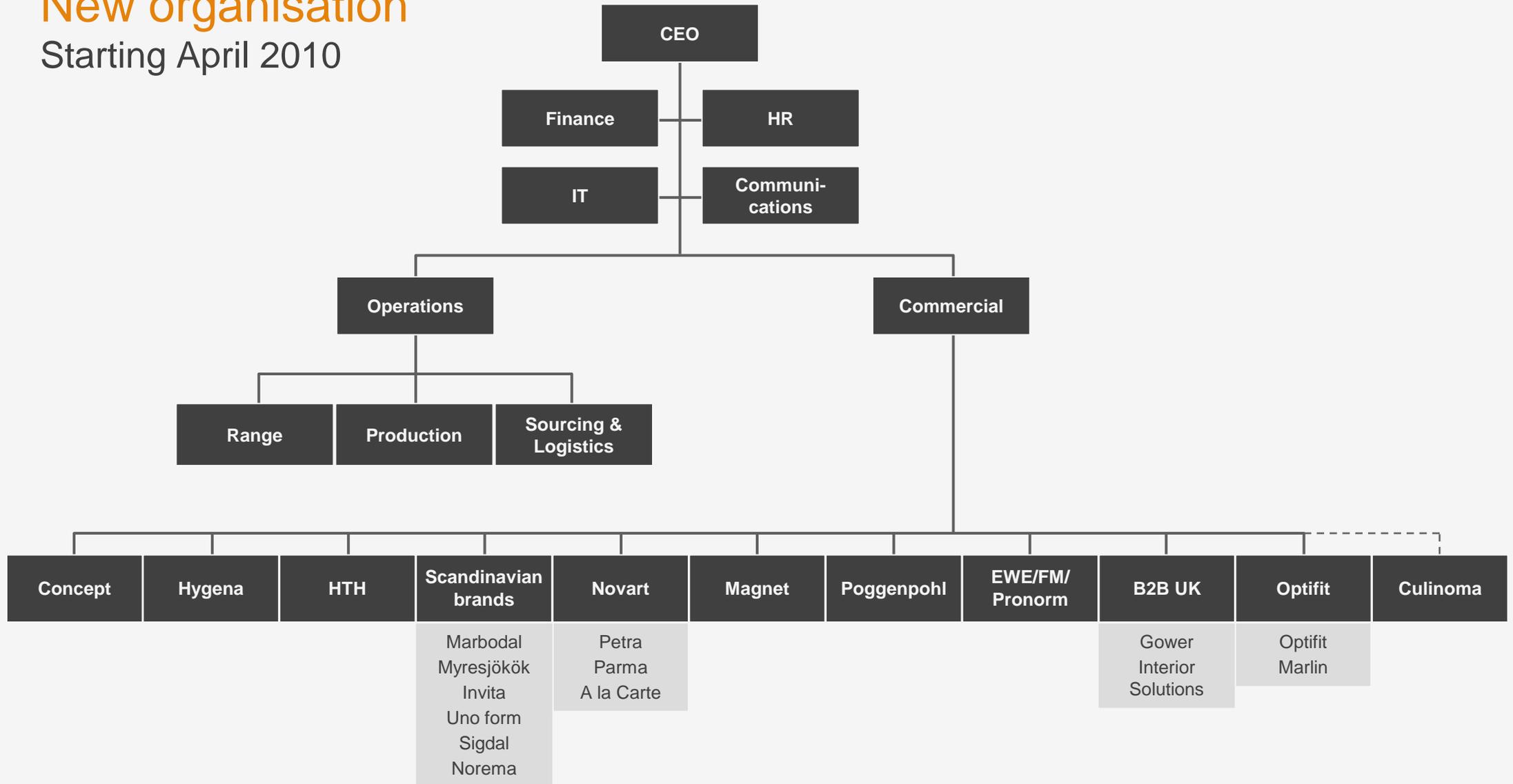
# The process starts in April 2010

1. Group management positions in place
2. Reporting structures changed for
  - Product development
  - Sourcing
3. Implementation of the new organisation starts in
  - Denmark
  - UK
  - Sweden
  - Norway



# New organisation

Starting April 2010



# A better way!

Building a stronger Nobia



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# Attractive offerings and distinct brands

Preben Bager, acting CCO



# Our objectives

- Improved customer offer
- Improved commercial processes
- Improved customer service
- More efficient production and purchasing
- Lower costs and less working capital

# Nobia's seven identified concepts by channel and position

## Two main channels to market

### B2C (Business to Consumer)

- This is what we know as retailing kitchens, and we have segmented our concepts from Economy to Luxury **(Concepts 1 to 4)**

### B2B (Business to Business)

- That business can be
  - Another retailer, to whom we may sell branded **(Concept 5)** or private label products **(Concept 6)**
  - A non-retailing professional, such as a housing developer, etc. **(Concept 7)**

	Economy	Middle	Upper middle	Luxury
Nobia-controlled Retailer	Concept 1	Concept 2	Concept 3	Concept 4
B2B Retailer (Nobia-branded)		Concept 5		
B2B Private label	Concept 6			
B2B Professionals	Concept 7			

# Concept 1 – Nobia retail economy

1

*Basic kitchens for the self-fitter at a budget price*



Hygena



HTH

	Economy	Middle	Upper middle	Luxury
Nobia-controlled Retailer	Concept 1	Concept 2	Concept 3	Concept 4
B2B Retailer (Nobia-branded)		Concept 5		
B2B Private label	Concept 6			
B2B Professionals	Concept 7			

# Concept 2 – Nobia retail middle

2

*Kitchens for families wanting extra quality for good value*



Norema



Marbodal

	Economy	Middle	Upper middle	Luxury
Nobia-controlled Retailer	Concept 1	Concept 2	Concept 3	Concept 4
B2B Retailer (Nobia-branded)	Concept 5			
B2B Private label	Concept 6			
B2B Professionals	Concept 7			

# Concept 3 – Nobia retail upper middle

3

*High-quality kitchens satisfying individual needs for functionality, design and service*



Invita



Magnet

	Economy	Middle	Upper middle	Luxury
Nobia-controlled Retailer	Concept 1	Concept 2	Concept 3	Concept 4
B2B Retailer (Nobia-branded)	Concept 5			
B2B Private label	Concept 6			
B2B Professionals	Concept 7			

# Concept 4 – Nobia retail luxury

4

*The ultimate kitchen in functionality, design and service support for the wealthy home*



Poggenpohl



Uno form

	Economy	Middle	Upper middle	Luxury
Nobia-controlled Retailer	Concept 1	Concept 2	Concept 3	Concept 4
B2B Retailer (Nobia-branded)	Concept 5			
B2B Private label	Concept 6			
B2B Professionals	Concept 7			

# Concept 5 – B2B retailer

5

*The professional, reliable branded kitchen manufacturer offering category management skills that build long term profitability for the customer. The branded kitchen offer spans from Middle to Luxury*



	Economy	Middle	Upper middle	Luxury
Nobia-controlled Retailer	Concept 1	Concept 2	Concept 3	Concept 4
B2B Retailer (Nobia-branded)		Concept 5		
B2B Private label	Concept 6			
B2B Professionals	Concept 7			

# Concept 6 – B2B private label

6

*The professional, reliable private-label kitchen manufacturer offering category management skills that build long-term profitability for our customer's customer. The private-label kitchen offer spans from Economy to Middle.*



	Economy	Middle	Upper middle	Luxury
Nobia-controlled Retailer	Concept 1	Concept 2	Concept 3	Concept 4
B2B Retailer (Nobia-branded)	Concept 5			
B2B Private label	Concept 6			
B2B Professionals	Concept 7			



# Concept 7 – B2B professionals

7

*The kitchen specialist for the construction and project market offering tailor-made kitchen solutions from Economy to Luxury. We offer a unique one-stop-shop solution.*



Poggenpohl



Myresjökök

	Economy	Middle	Upper middle	Luxury
Nobia-controlled Retailer	Concept 1	Concept 2	Concept 3	Concept 4
B2B Retailer (Nobia-branded)	Concept 5			
B2B Private label	Concept 6			
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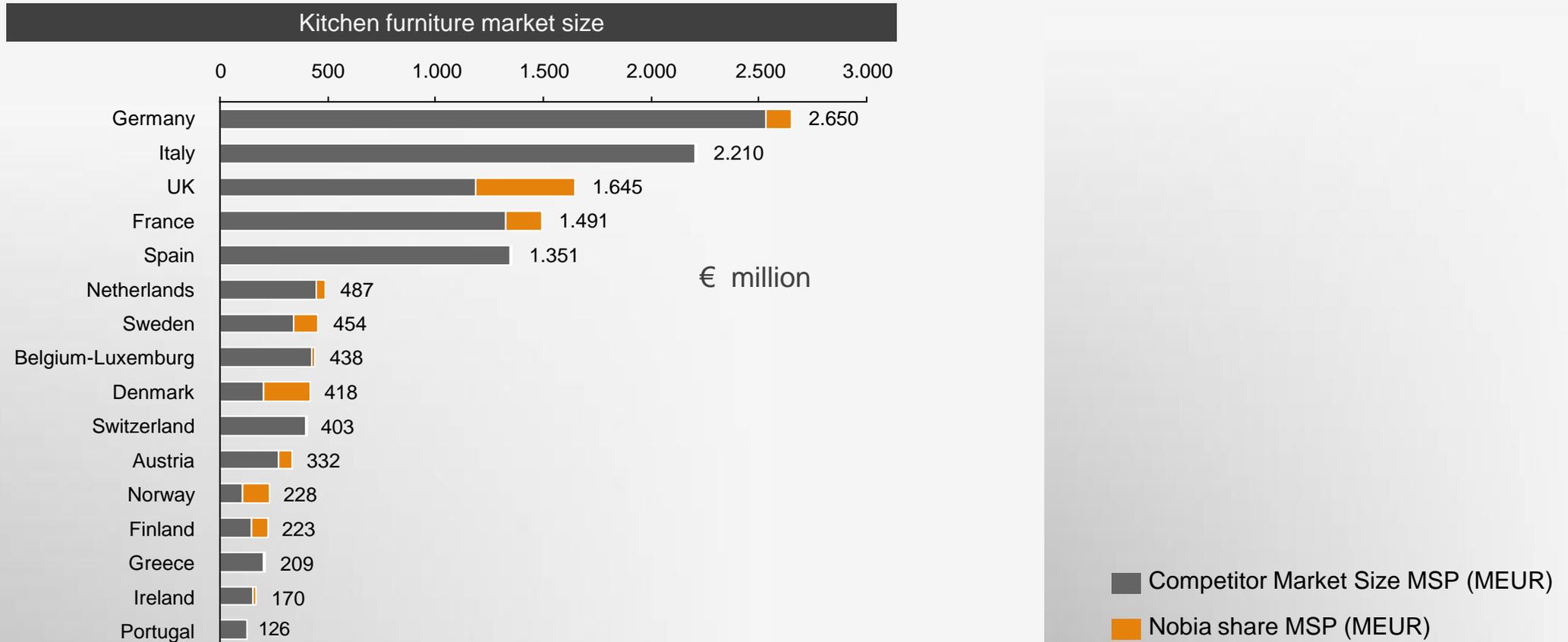
# Dimensions that differentiate the concepts

- Product offer
- Retail environment and merchandising
- Marketing
- Service
- Pricing strategies



Potential for organic growth  
based on scalable concepts

# Opportunities in the European kitchen market



Source: CSIL Europe 2009; MSP 2008

# The Commercial potential in brief

- Seven key concepts
- Concepts and brands with a clear differentiation
- Clear direction for organic growth



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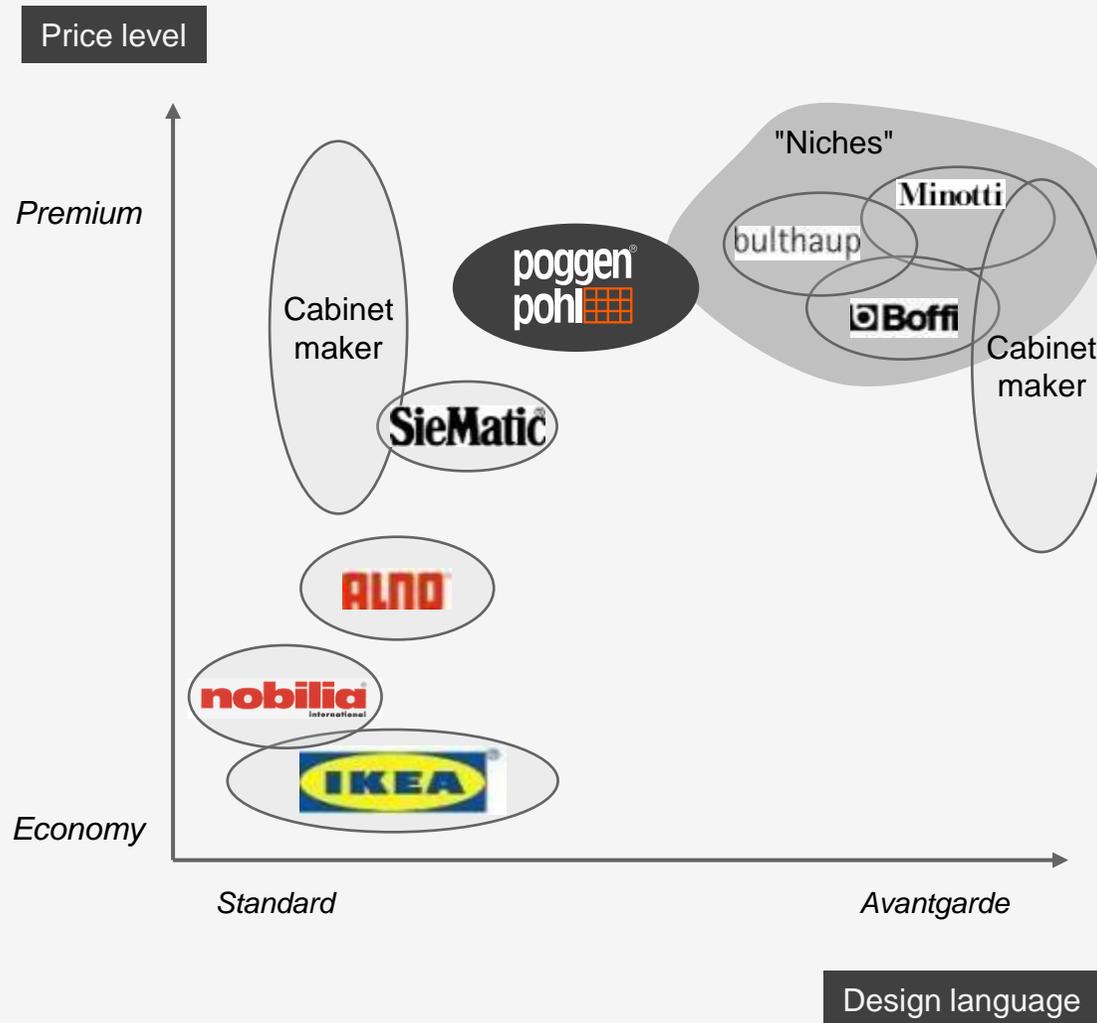


# Luxury segment brand: Poggenpohl

Elmar Duffner



# Clear and established positioning



Poggenpohl ranks sixth among all German luxury brands and is the number-one luxury furniture brand in Germany – perhaps in the world.

Source: Periodically generated market survey by Brand Rating and the WirtschaftsWoche.

# Poggenpohl's peers



# Three award-winning design concepts



Design by JORGE PENSI  
(b. 1946)



# Project in Malaysia – The Binjay on the Park



## Location

Kuala Lumpur

## Developer

Layar Intan

## Number of units

171

[www.thebinjaionthepark.com](http://www.thebinjaionthepark.com)

# Project in Dubai – Victory Heights



## Location

Dubai, Sports City

## Developer

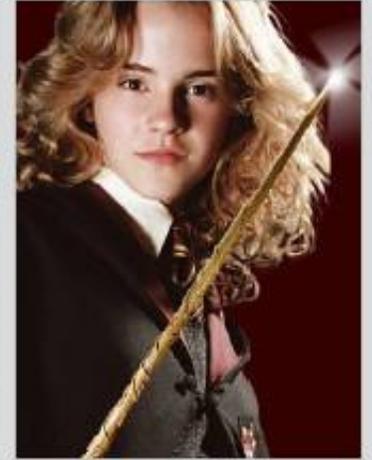
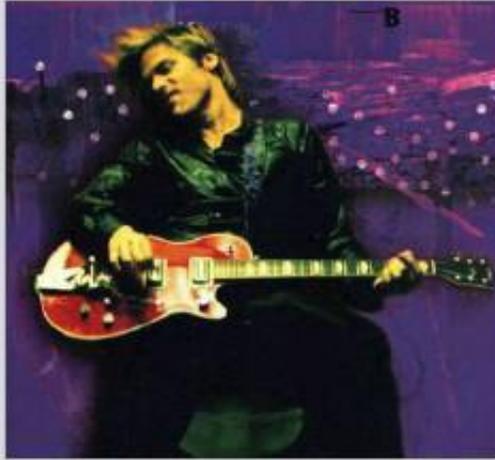
Dubai Sports City

## Number of units

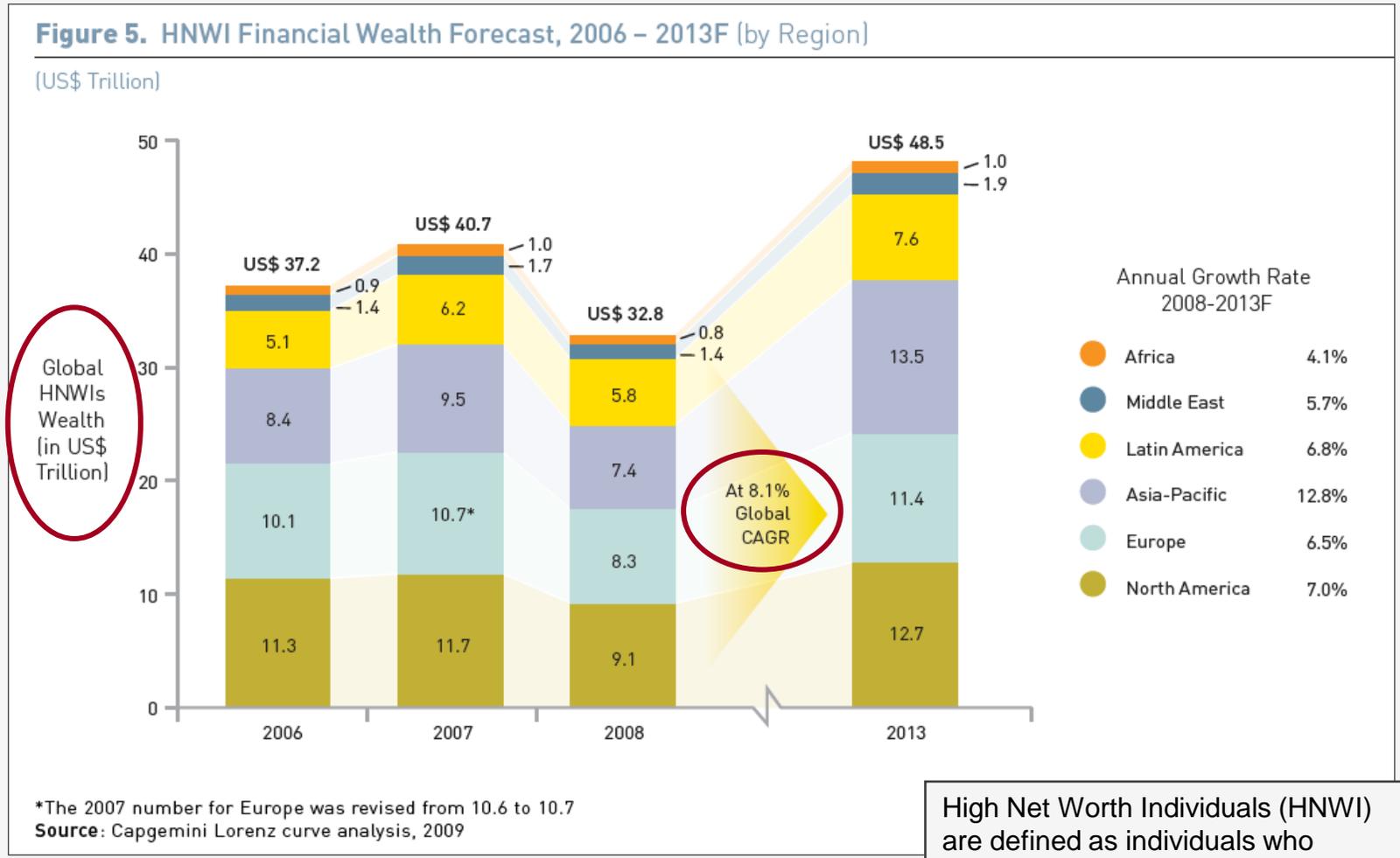
200

<http://www.vh.ae>

## Some Poggenpohl customers



# Growth of potential luxury consumers



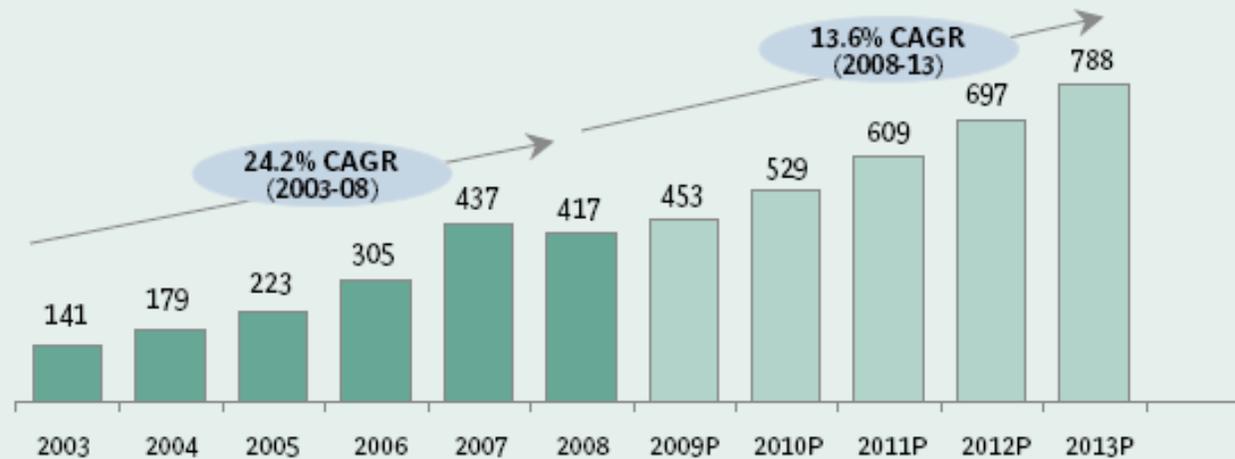
High Net Worth Individuals (HNWI) are defined as individuals who possess more than 1 million USD in financial assets.

Source: World Wealth Report 2009 published by Capgemini & Merrill Lynch

# China is the future top luxury market

**Exhibit 5. The Number of Millionaire Households Is Expected to Nearly Double from 2008 to 2013**

Number of millionaire households in China: 2003-2013 (in thousands)



<b>Total millionaire HH AuM (US\$ Tn)</b>	0.45	0.58	0.76	1.07	1.62	1.56	1.73	2.09	2.49	2.98	3.49
<b>Average AuM per millionaire HH (US\$ Mn)</b>	3.19	3.25	3.30	3.52	3.78	3.75	3.80	3.95	4.10	4.27	4.43

Source: Boston Consulting Group, Wealth Market Sizing Database 2009

# Distribution via exclusive partners and DOS

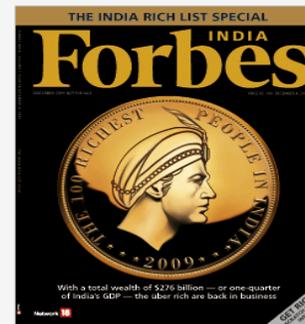


“Of the 50 wealthiest people of **Hong Kong** more than 50 % own a Poggenpohl kitchen. And we are striving for more.”

SANDRA WONG, Director  
Poggenpohl (China) Ltd.  
Hong Kong Office



New multi-level studio in **Bangalore/ India**



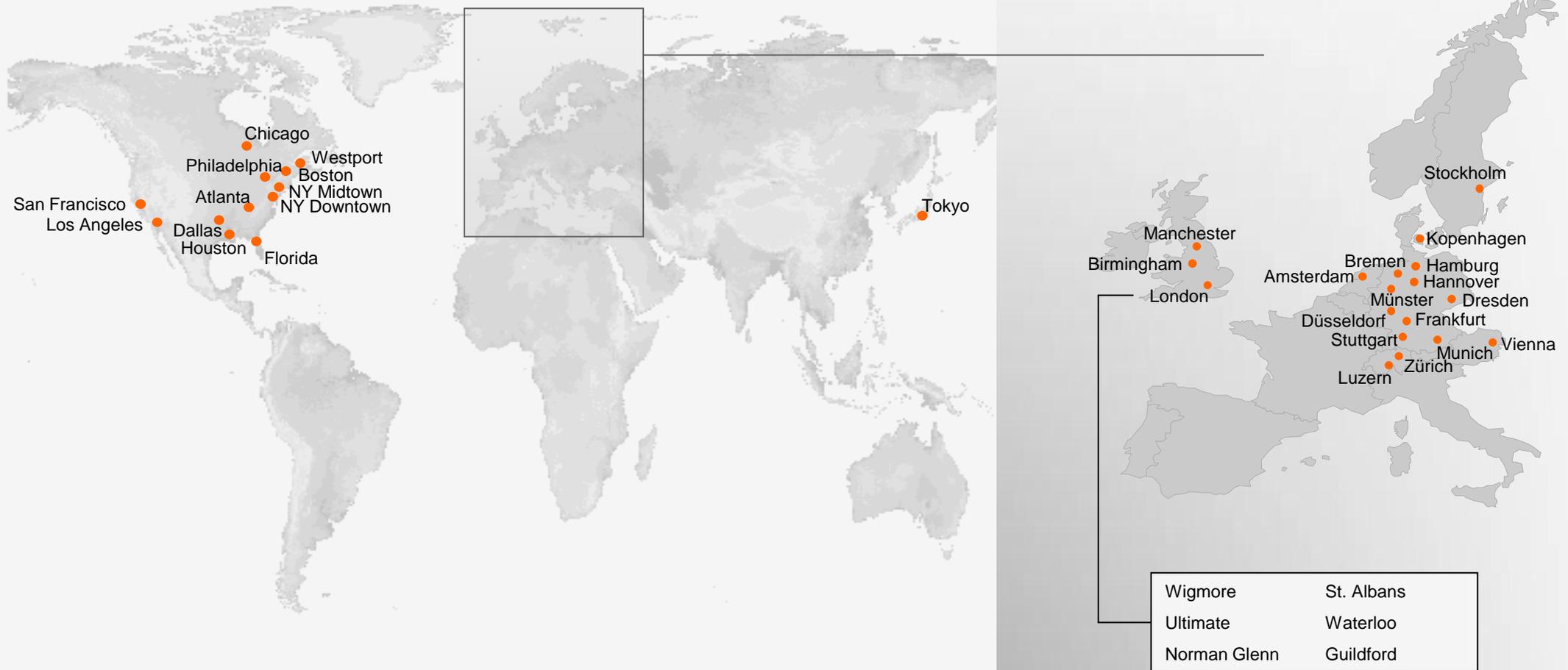
25% of the 100 richest people in India are owners of a Poggenpohl kitchen.

# Unique new kitchen concept

- Presentation of a new and highly innovative kitchen concept at the Milan furniture fair
- Demonstrate once again that we are setting the pace in the kitchen industry
- New concept will be particularly appealing to architects



# Current DOS footprint – 36 studios in 9 countries



# Increasing Importance of DOS

Until 2003	2004	2005	2006	2007	2008/ 2009	
Florida	London (Norman Glenn)	Guildford	Stuttgart	Frankfurt	Dresden	Luzern
Stockholm		Waterloo	Zürich	San Francisco	Atlanta	Bremen
Los Angeles	London (Wigmore)	Manchester		Birmingham	Amsterdam	Dallas
Kopenhagen		Hamburg		Münster	Wien	Tokyo (to be opened)
Chicago	London (Ultimate)	Düsseldorf			Zürich	
NY Downtown					Houston	
NY Midtown					Philadelphia	
Boston					St. Albans	
Westport						
						
						

- From 9 to 36 DOS between 2003 and 2009
- 9 new studios in Germany since 2005
- Tokyo DOS opens 10 March 2010

# The Poggenpohl vision

## Our Vision

To become the undoubted number one.

## That means

Poggenpohl will become the worlds most reputable kitchen brand and the clear leader in the premium segment of the global kitchen market.



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# Upper-middle segment brand: Magnet

Peter Kane



# Upper-middle market consumer

Higher income homeowners, typically aged 36 – 65 who value quality products and services and are happy to spend in the region of £8,000 for a new kitchen

- Female (With male joint decision maker)
- Married
- Homeowner
- Full-time employed
- Life stage = Empty Nester, Mature family or Older Singles
- Household income = entry level +£35k (Core £60 - £70k+)

‘Discerning customers who demand high level of end-to-end service’



# Driving footfall



Brand



Promotional Messages

## Marketing Mix

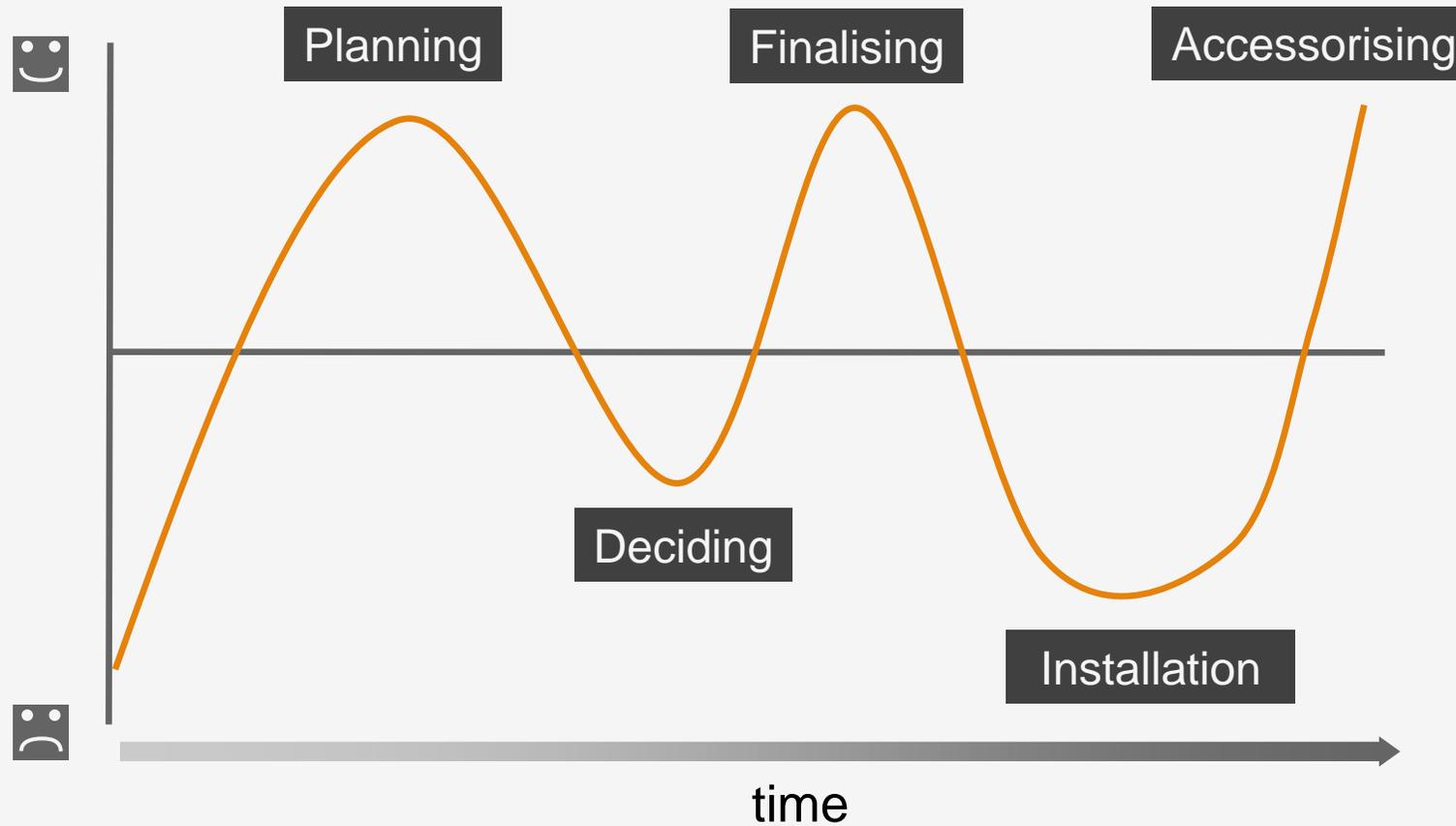


Increase Awareness & Brand Desire

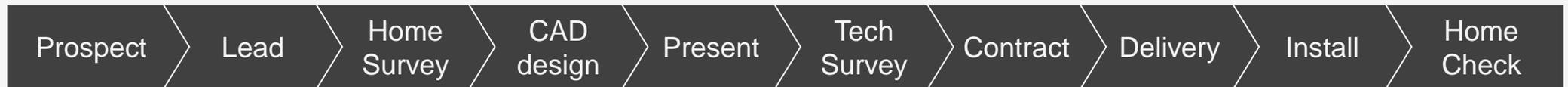
Drive relevant footfall into stores

# The kitchen buying process

An emotional rollercoaster!



## The retail sales process is a series of triggered events



# Converting footfall to prospects

- 40,000 showroom visitors per week
- Key data capture opportunity
- In-store customer engagement



Prospect

Lead

Home  
Survey

CAD  
design

Present

Tech  
Survey

Contract

Delivery

Install

Home  
Check

## All leads are “qualified” for:

- Purchase intent
- Budget
- Timescale



Prospect

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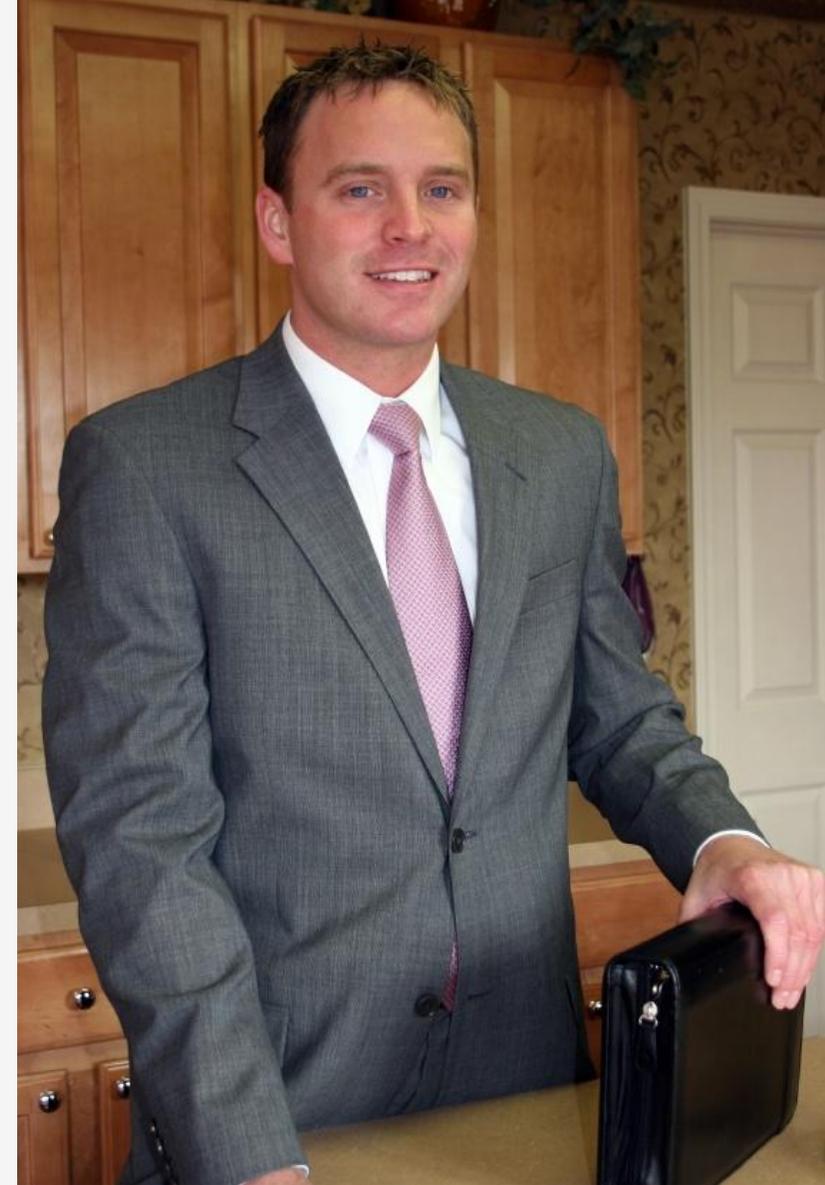
Delivery

Install

Home  
Check

## Home survey

- Customer's individual requirements and how they use their kitchen are discussed
- Layout options discussed
- Detailed measurements of the room



Prospect

Lead

Home  
Survey

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Check



# Presentation

- Design and price finalised with customer
- Full use of showroom facilities (i.e. displays, sample boards, plasma screens)
- Once price and design are agreed, a deposit is paid to proceed



Prospect

Lead

Home  
Survey

CAD  
design

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# Technical survey

- Technical survey undertaken by installer to check that the agreed design will fit exactly in room space
- Compliance with gas, water and electrical regulations



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## Contract raised

- Order is "slotted" into the manufacturing & distribution system and a delivery date is agreed with the customer



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# Delivery

- 6 days before agreed delivery date, the customer is contacted and again on morning of delivery
- 2-man delivery including appropriate floor protection



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# Installation

- Magnet installations are only undertaken by approved Magnet Kitchen Installers
- Installers measured by strict KPIs
- Installers only paid on production of a customer-signed satisfaction note



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# Summary of retail sales process



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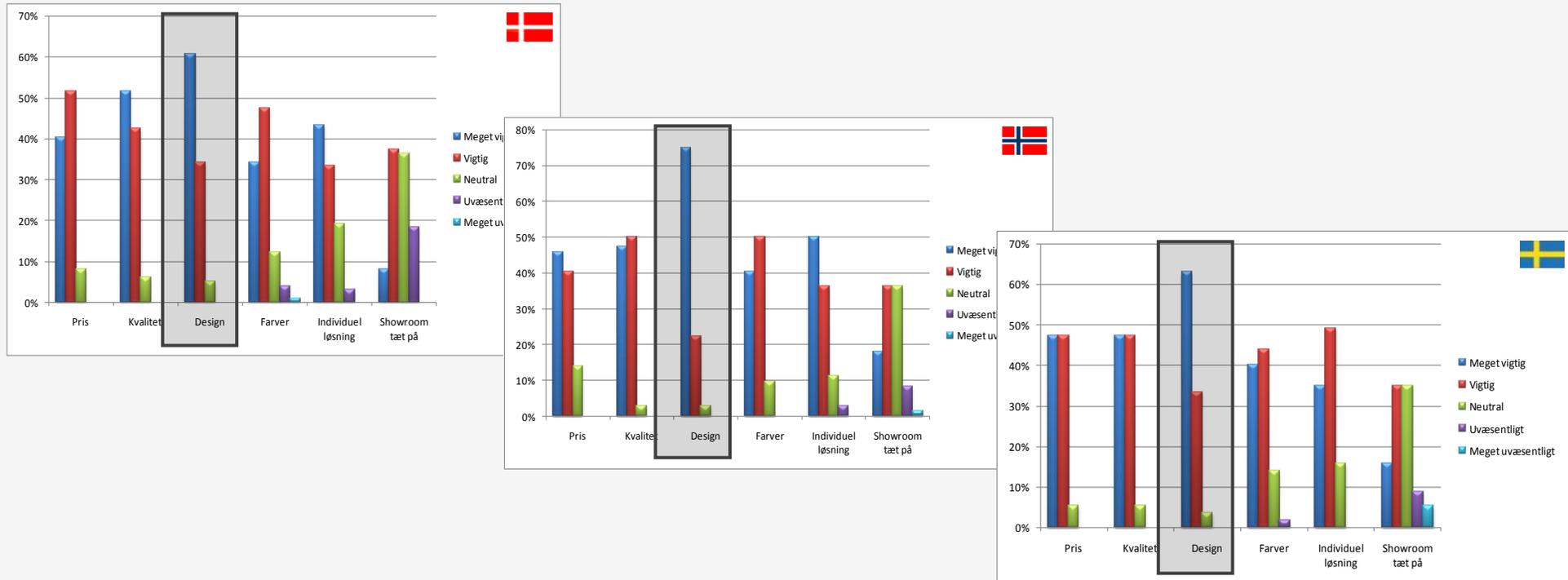
# Middle segment brand: HTH

Henrik Karup Jørgensen



# Consumer decision factors

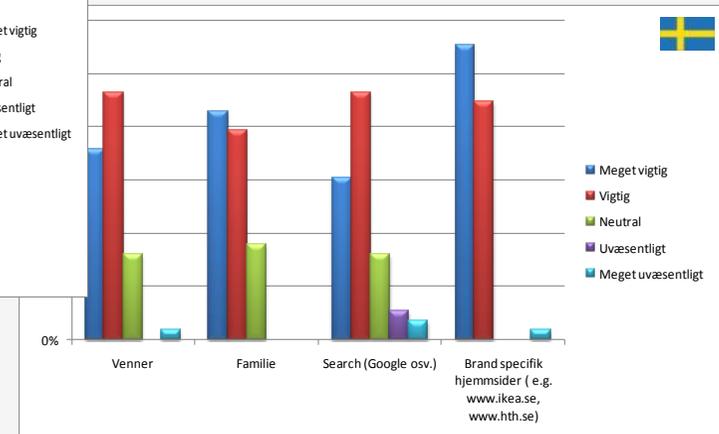
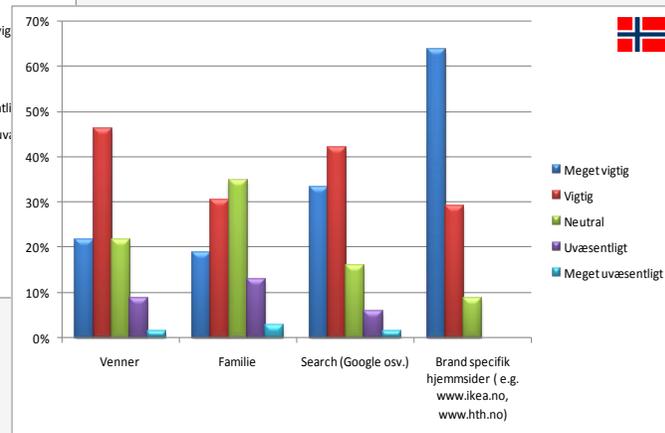
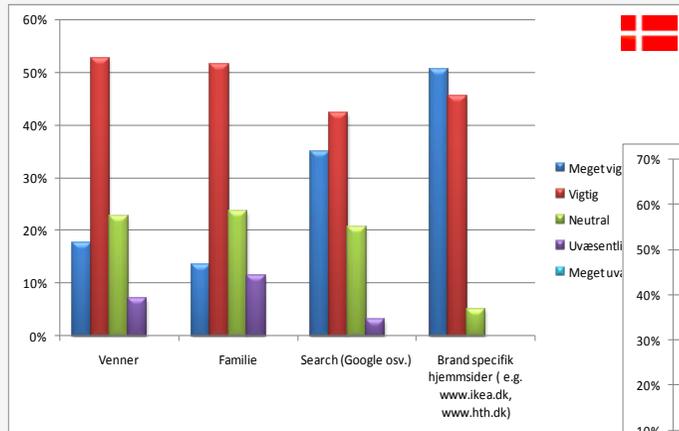
? What is important to you when choosing a new kitchen?



! Design, individual solutions and "value for money" are key factors

# Consumer sources for inspiration

**?** Which sources are important to you when seeking information and inspiration for your new kitchen?

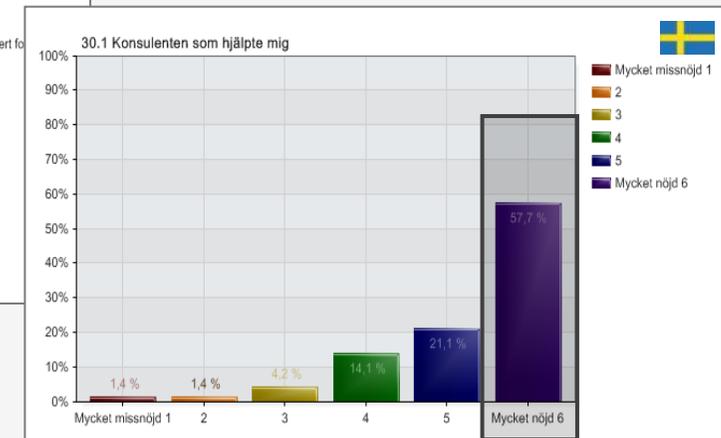
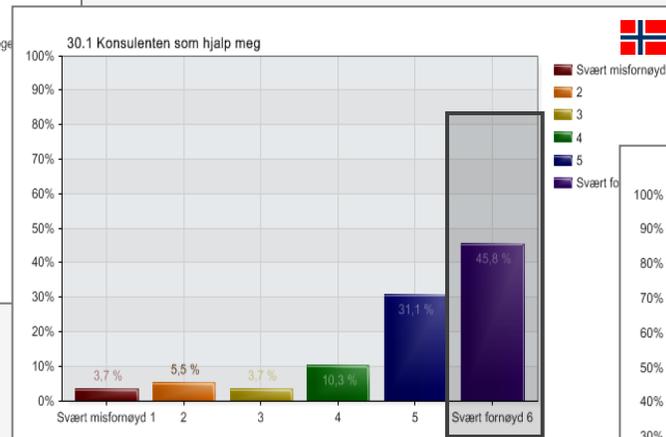
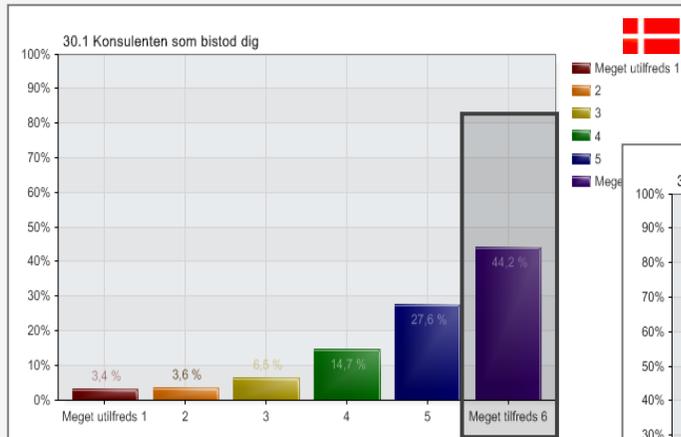


**!** Recommendations are important but the internet is also a major factor when seeking information and inspiration

# Consumer satisfaction with staff



How satisfied were you with the sales consultant who serviced you?

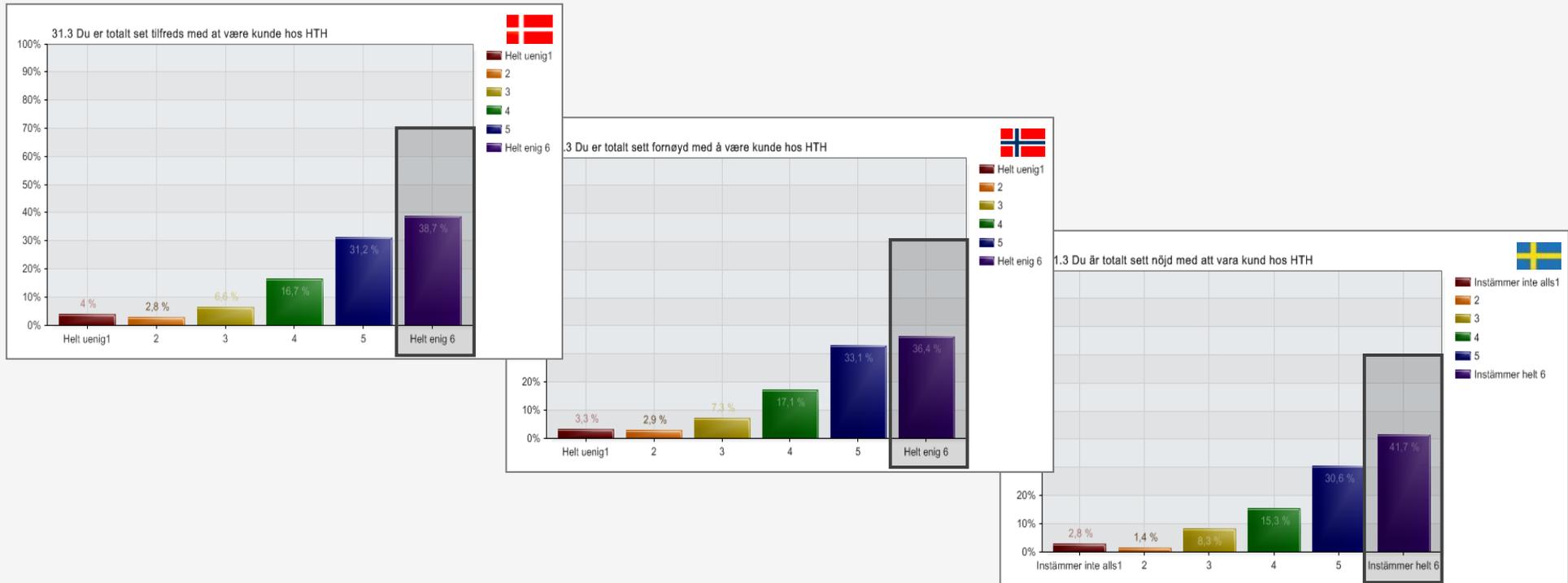


The consumers are extremely satisfied with the service of the HTH sales consultants

# Overall consumer satisfaction



How satisfied are you overall as an HTH customer?



Satisfaction levels are generally very high

# Store experience – exit interviews

## Main conclusions from interviews:

### Respondents

- Have a positive image of the HTH brand
- Perceive HTH as good quality and good design
- Perceive price and quality as important when choosing a kitchen
- Have a positive experience with the store staff





## **So, what do the consumers demand?**

- Flexibility in the purchasing process
- Greater elasticity in the price setting



Therefore we have developed

## HTH À la Carte

The most flexible and tailored  
way to buy and sell kitchens!

# *à la carte*

Det har været besværligt at købe køkken.  
Og priserne har ikke været nemme at gennemskue.  
Det laver vi om på nu.

Med en helt ny måde at købe køkken på. Som er fleksibel i forhold til mængden af hjælp og service og dermed også fleksibel, når det gælder prisen.

Vi kalder det HTH a la carte.

Begrebet signalerer frihed til at vælge og mulighed  
or at regulere regningen efter egen appetit og  
pengepung. Derfor bruger vi det som symbol  
på HTHs nye tilbud om at købe køkken med  
præcis den mængde service, rådgivning,  
hjælp og opfølgning, kunden vil betale for.



# Menuen sammensætter du selv

4

For at gøre det nemt at overskue mulighederne har HTH à la carte tre serviceniveauer med hver sit navn. Det betyder, at det samme køkken kan fås til forskellige priser afhængigt af, hvor meget du selv vil stå for.

Så når du har valgt det køkken, du vil have, vælger du bagefter, hvor meget det skal koste.



**Køb med et klik**

– Billigere bliver det ikke



**Gør det selv**

– Spar service og penge



**Trygt og godt**

– Med service fra ende til anden

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## À la Carte commercial



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# Economy segment brand: Hygena

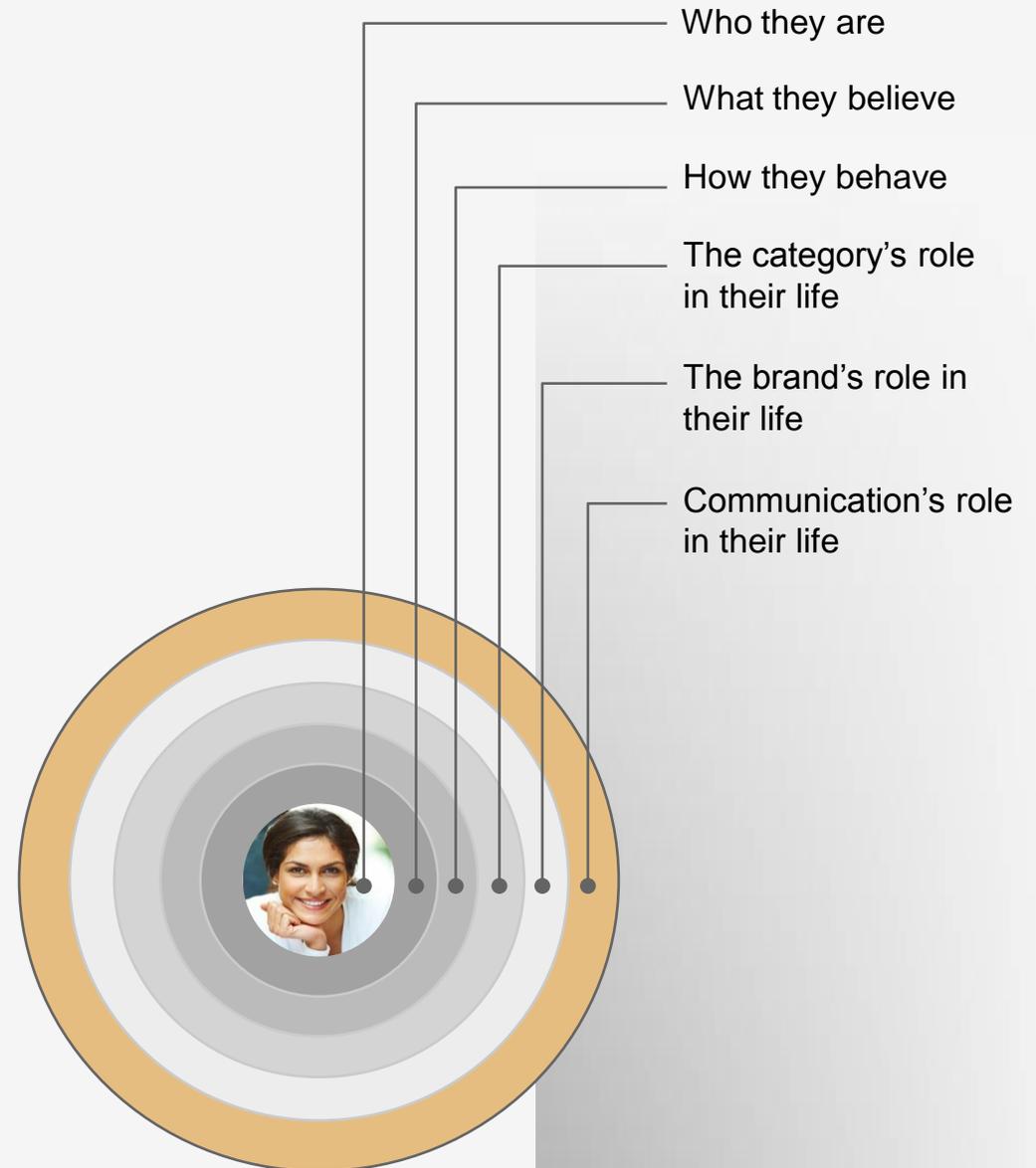
Nick Friend



# Understanding the target consumer

**We have clearly defined a target consumer for each Concept**

This will inform all of our marketing and range development activities



# Economy example: Describing target consumer lifestyle

## John/Jaques

- 35 to 45
- Married with young
- Shops with his wife
- Middle manager, w
- limited disposable
- Not a great DIY pro
- man, but willing to
- go- or may pay for
- Compares details o
- internet
- About 30% of mar



## Mary/Marie

- 25 to 35 married or in partnership
- First home
- Design on a budget
- Impressed by stores, displays, brochures
- Probably tries internet
- A novice purchaser - first kitchen
- About 5% of market



nobia



# Agenda

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## The strategic direction

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Attractive offerings and distinct brands

Poggenpohl

Magnet

HTH

Hygena

■ The B2B market and category management

## OPERATIONS

Delivering world-class kitchens

Range

Production

Sourcing and logistics

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## Q & A

## Cocktails

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Preben Bager, CEO

Preben Bager, CCO

Elmar Duffner

Peter Kane

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Göran Westerberg, COO

Björn Block

Ingemar Tärnskär

Mats Rignell

Preben Bager



# The B2B market and category management

Nick Friend



# Nobia knows B2B

- Experience / long term relations
- Coverage across countries
- A portfolio of strong brands covering all segments / price groups



•myresjökök

**NOREMA**



Interior  
solutions



Gower

Optifit



**uno form**

# Examples of B2B customers

- Construction companies
- Rental apartments
- House manufacturers
- DIY retail chains
- Furniture stores
- Other public customers

# The Gower example

- Category Manager of Kitchens
  - DIY retailer have a variety of products in their stores and believe Gower has a greater specialist knowledge of kitchens
  - However, they balance this by negotiating key deliverables: sales and profit targets
- This relationship is based on
  - Exclusive supply
  - Long term contracts
  - Trust and integrity regarding data access and sharing
- Interaction is across a functional spectrum, not solely through the sales function
- Decisions are based on facts; success evaluation is equally data based

# The benefits for the private label customer

- Insight into kitchen consumer
- Review of competitor activity
- Identify trends and develop new ranges
- Designs the displays
- Pricing recommendations
- Promotional planning
- Staff training
- Monitors and analyses performance
- Minimise supply chain cost
- Produces sales forecasts to ensure delivery service excellence



# The benefits for Nobia

- Increasing our kitchen sales to that customer
- Enables us to develop a more secure trading relationship, i.e. establish a strategic partnership
- It provides an opportunity for us to command a premium price, and thereby improve profits
- We shift our customer's focus from 'low cost' to 'maximising profitability'

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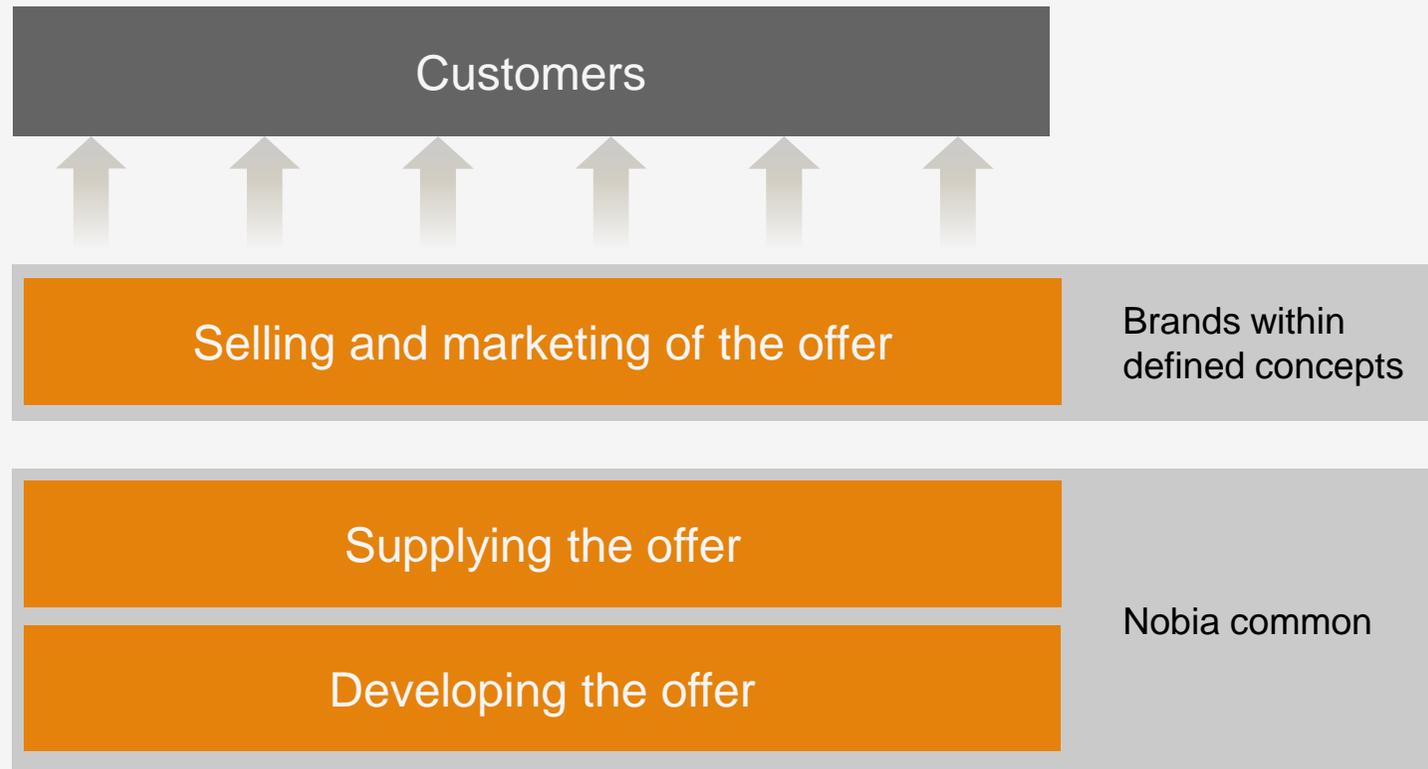


# Delivering world-class kitchens

Göran Westerberg, COO



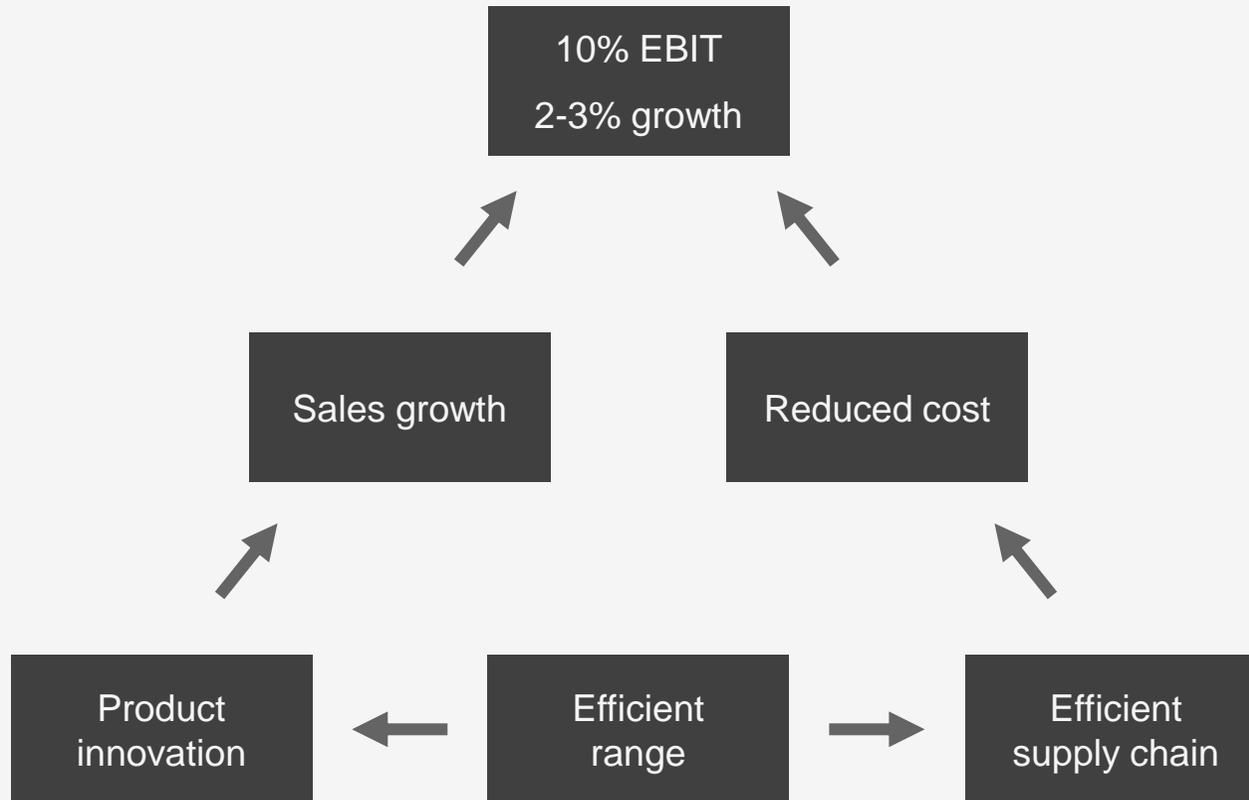
# Nobia's value chain



Range size and complexity drives cost  
in every step of the value chain



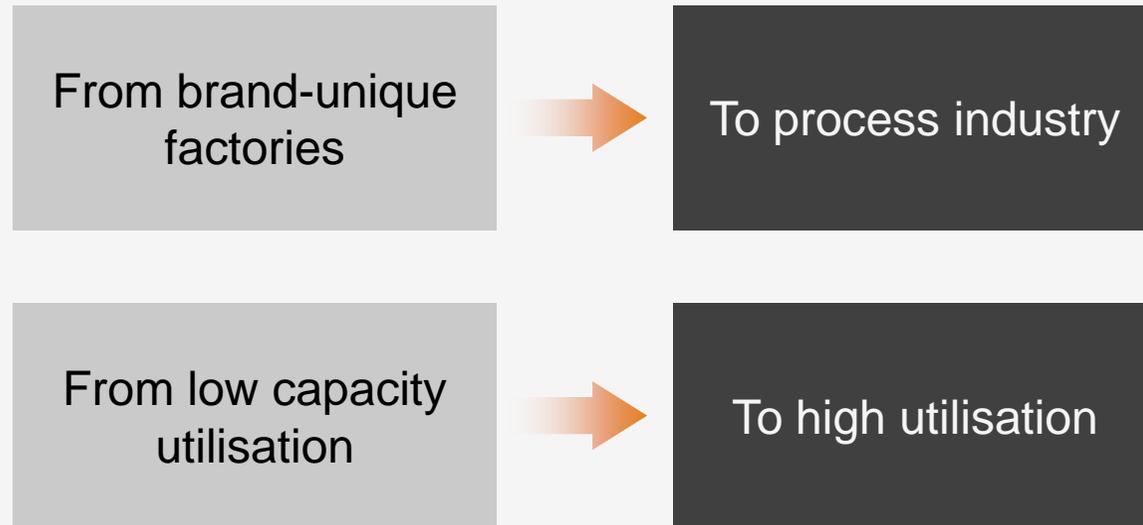
# Creating conditions for growth and profit



## Reduced complexity through the supply chain

Nine platforms → One European platform

# Conditions for efficiency

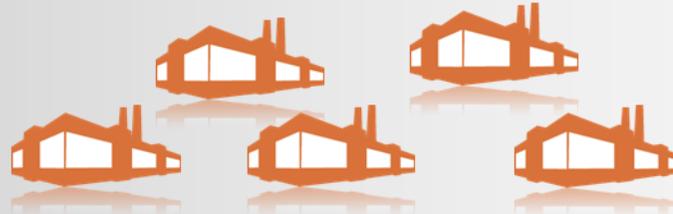


# Production structure

Past

## Vertically integrated plants

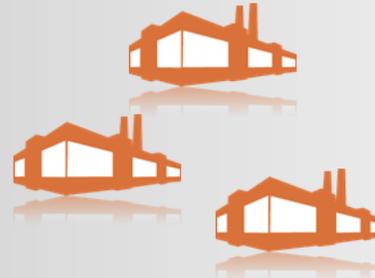
- Components
- Assembly
- Distribution



Today

## Plants for several brands

- Components
- Assembly
- Distribution



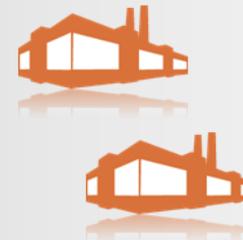
Implemented 2009:

- Finland
- Norway/Sweden
- Denmark

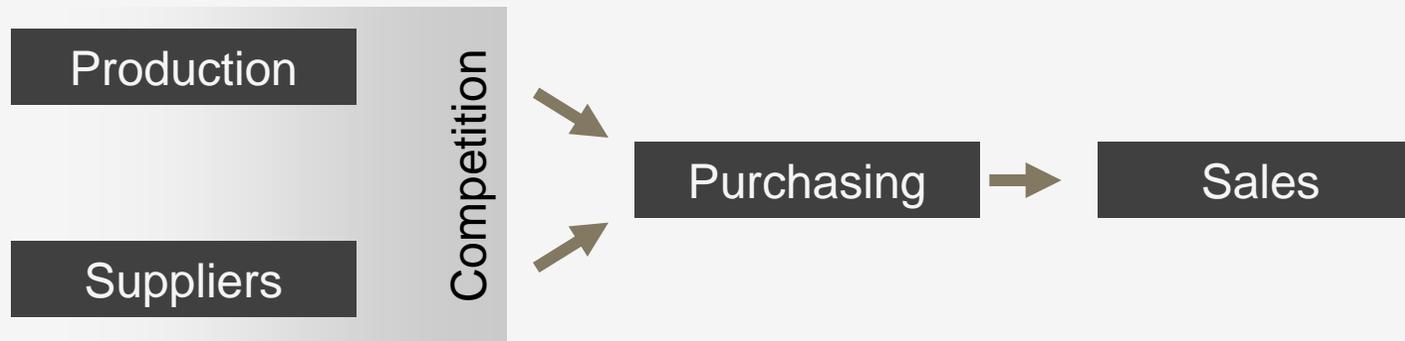
Tomorrow

## Brand-independent plants

- Components
- Assembly
- Distribution
- Certain degree of specialisation possible



# Supply chain



# Cost reduction initiatives

- A smarter range – attractive and efficient
- Increased efficiency in production
- Competitive sourcing





# Range

Björn Block



# Creating conditions for growth and profit



## A common Nobia carcass platform

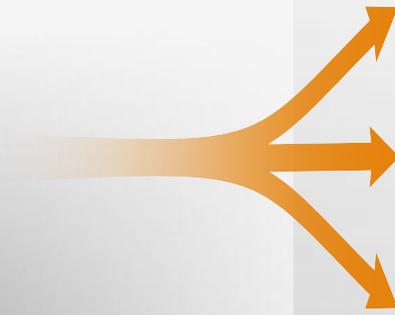
We are not the first industry to build on platforms



**Volkswagen PQ35**



- Audi A3
- Audi TT
- Audi Q3
- Volkswagen Touran
- Volkswagen Caddy
- Volkswagen Golf
- Volkswagen Jetta
- Volkswagen Eos
- Volkswagen Tiguan
- Volkswagen Scirocco
- Škoda Octavia
- Škoda Yeti
- SEAT Toledo
- SEAT León
- SEAT Altea

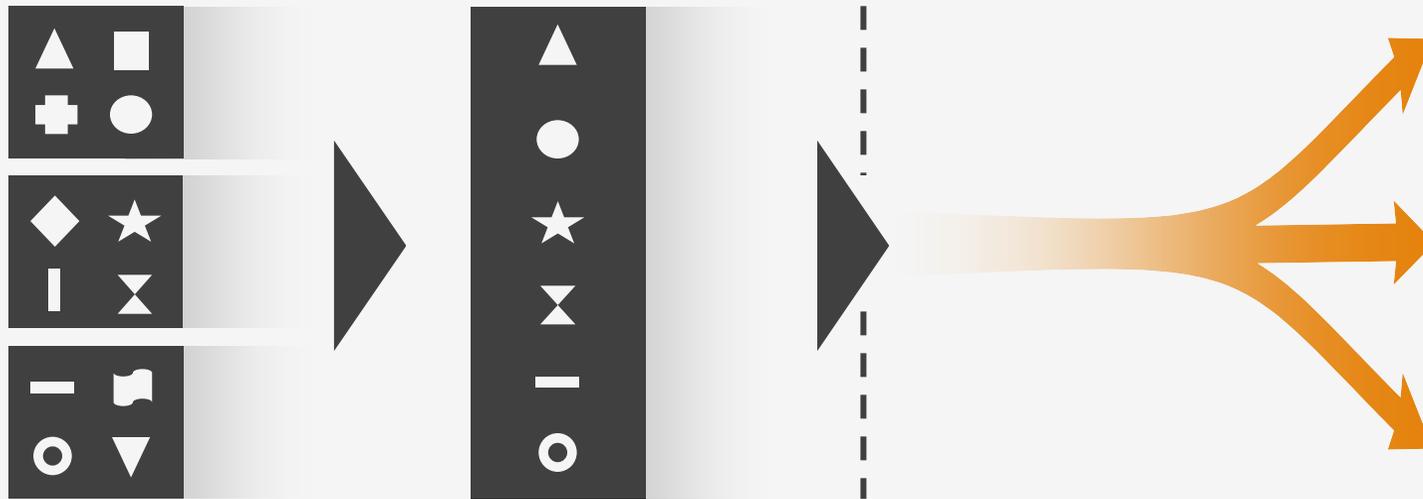




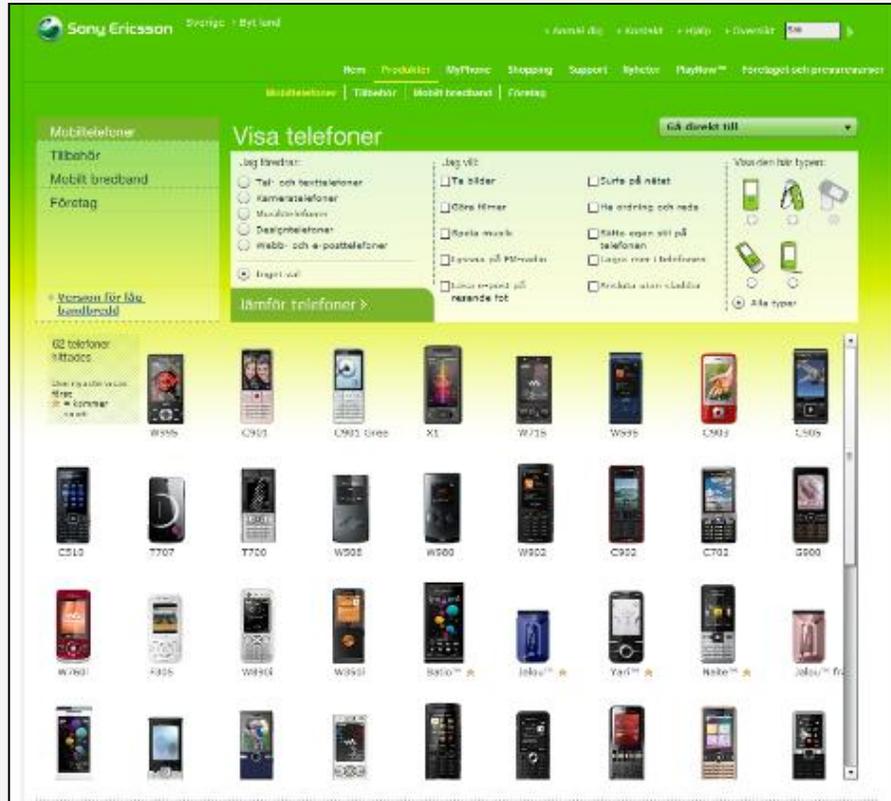
Nobia K20



# A common platform gives us more opportunities

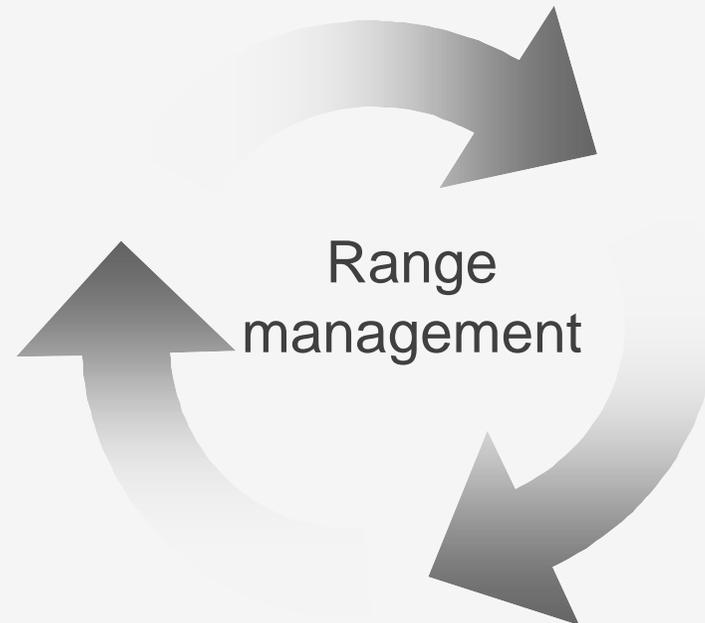


# Is the broadest range a winning concept?



Today we have more than a thousand different:

- Door designs
- Sinks
- Knobs & handles



# Creating conditions for growth and profit



# Innovation by understanding the consumer



# Innovation by understanding the consumer

The screenshot displays the Spotify desktop application interface. At the top, there is a menu bar with 'File', 'Edit', 'Playback', and 'Help'. Below the menu bar is a search bar and a 'Playlist' tab. The main content area shows a playlist titled 'Skön musik' with a list of tracks. The tracks are listed in a table with columns for Track, Buy, Artist, Time, and Album. The current track is 'A Million Tears' by Kasey Chambers, Matthe... with a duration of 5:02. The interface also includes a sidebar with navigation options like Home, Radio, Play queue, and Purchases. A 'Falling Free' section is visible on the left, featuring a promotional image for David Gray's 'Shine: The Best of the Early Years'. At the bottom, there is a playback control bar showing the current track's progress (0:55) and a total duration of 3:23. The Spotify logo is prominently displayed in the top right corner.

Track	Buy	Artist	Time	Album
1,000 Miles Away		Jewel	4:18	The Essential Live Songbook
1.36		Coldplay	2:06	The Scientist
1000 Miles Away		Jewel	3:49	Goodbye Alice In Wonderland
1000 Miles Away - Acoustic Live		Jewel	3:45	Goodbye Alice In Wonderland
42		Coldplay	3:57	Viva La Vida - Prospekt's March Edition
4th Of July, Asbury Park (Sandy)		Bruce Springsteen	5:35	The Essential Bruce Springsteen
4Th Of July, Asbury Park (Sandy) - Live		Bruce Springsteen	6:30	Bruce Springsteen & The E Street Band Live 1975-85 (Display Box)
A Little Bit Lonesome		Kasey Chambers	2:59	Barricades & Brickwalls
A Message		Coldplay	4:45	X&Y
A Million Tears		Kasey Chambers, Matthe...	5:02	Barricades & Brickwalls
A New Day At Midnight [Live From London]		David Gray	3:00	Live From London
A Rush Of Blood To The Head		Coldplay	5:51	A Rush of Blood to the Head
A Rush Of Blood To The Head (Live In Sy...		Coldplay	6:51	Live 2003
A Whisper		Coldplay	3:58	A Rush of Blood to the Head
A Woman's Worth		Alicia Keys	5:03	Songs in A minor
A Woman's Worth (Live) - Unplugged		Alicia Keys	3:31	Unplugged
A Woman's Worth - Radio Edit		Alicia Keys	4:21	Nu Divas Vol.2
A Woman's Worth - Remix (Short Edit)		Alicia Keys	3:20	R'n'B Allstars
Adam Raised A Cain - Live		Bruce Springsteen	5:26	Bruce Springsteen & The E Street Band Live 1975-85 (Display Box)
Again and Again		Jewel	3:56	Goodbye Alice In Wonderland
Ain't No Love		David Gray	3:22	Life In Slow Motion
Ain't No Love [Live From London]		David Gray	3:41	Live From London
Alibi		David Gray	4:34	Life In Slow Motion
Ambitions		Donkeyboy	3:08	Ambitions
American Skin (41 Shots) - Live at Madiso...		Bruce Springsteen	7:50	The Essential Bruce Springsteen
Amsterdam		Coldplay	5:19	A Rush of Blood to the Head
Amsterdam (Live In Sydney)		Coldplay	5:20	Live 2003
Animals		Coldplay	5:33	Clocks

# What is the performance of your kitchen?

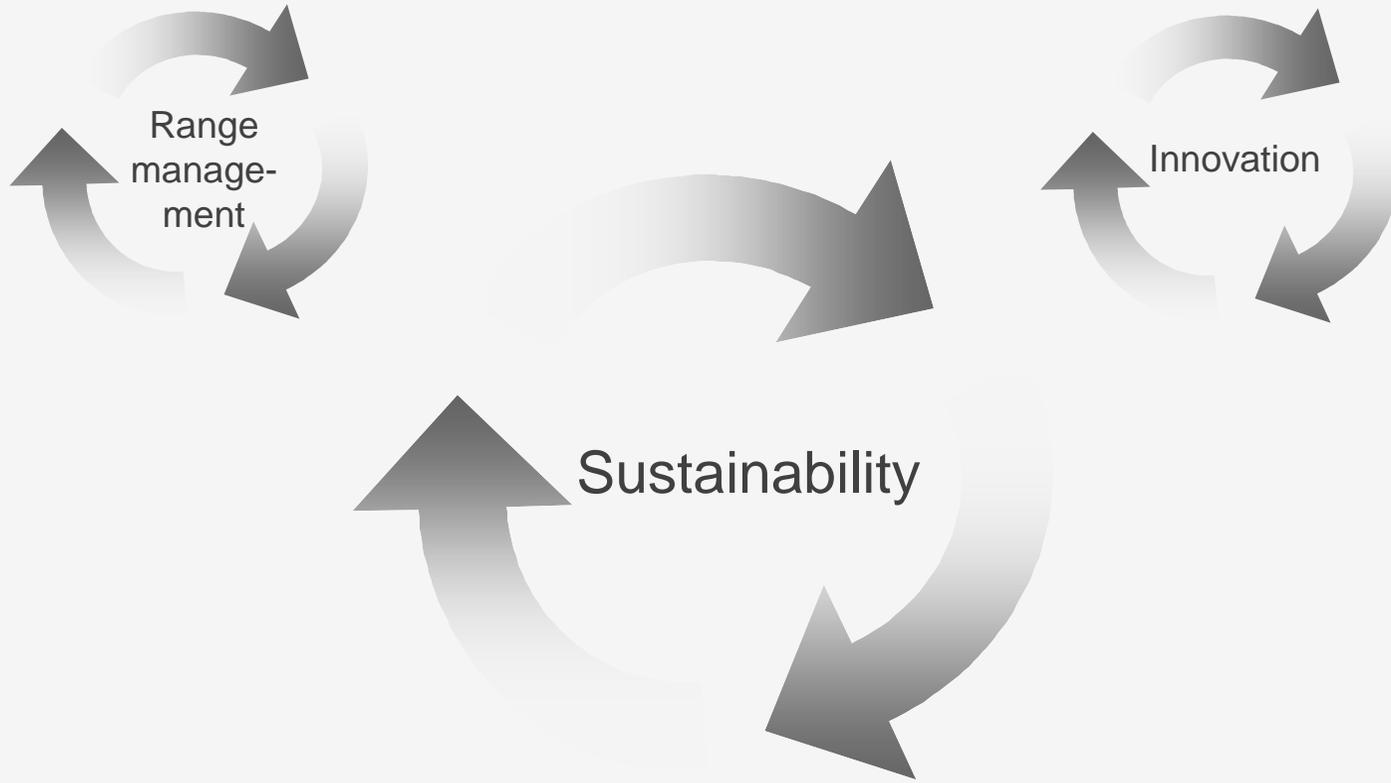


Day	Cycles	Av. Temp.	Eco Level
Monday	0	0°	●●●●●●●●
Tuesday	1	30°	●●●●●●●●
Wednesday	1	60°	●●●●●●●●
Thursday	3	40°	●●●●●●●●
Friday	1	90°	●●●●●●●●
Saturday	2	30°	●●●●●●●●
Sunday	0	0°	●●●●●●●●

Efficiency ●●●●●●●●

Temperature ●●●●●●●●

Energy Use ●●●●●●●●



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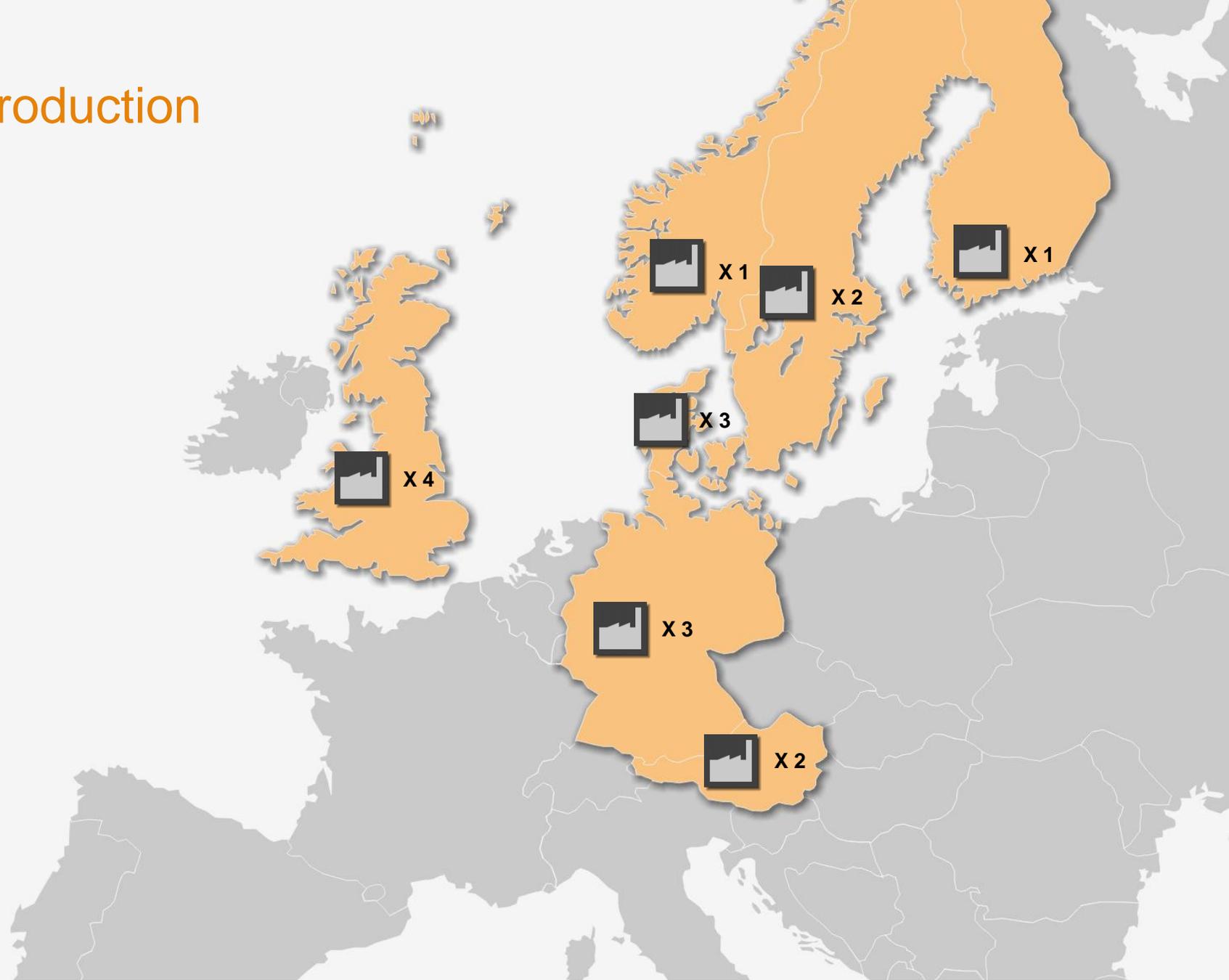


# Production

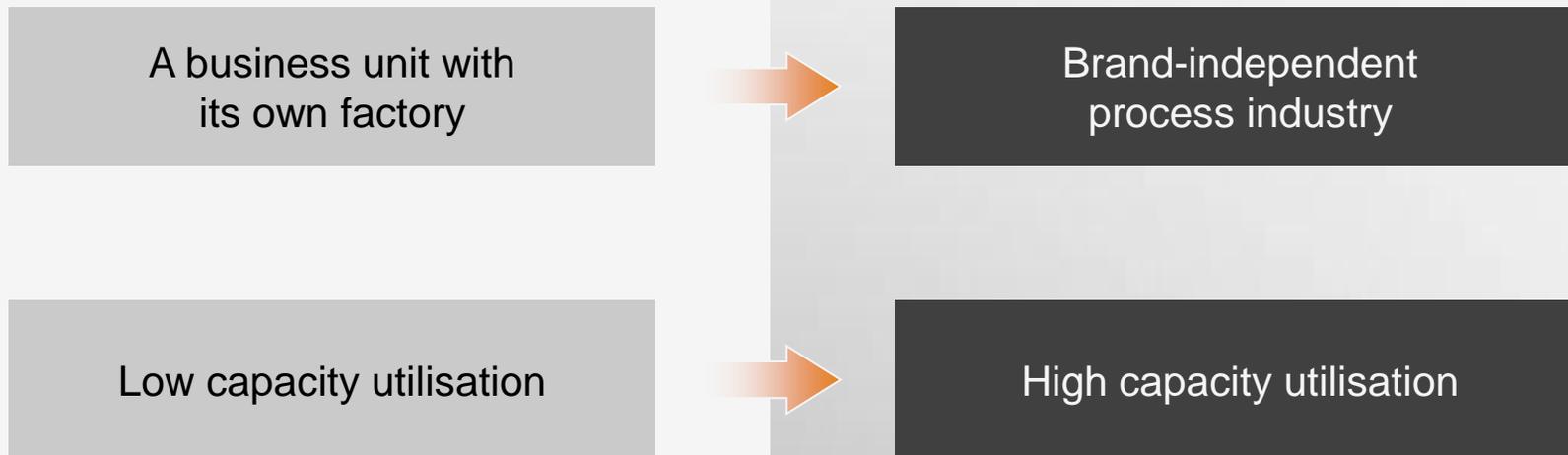
Ingemar Tärnskär



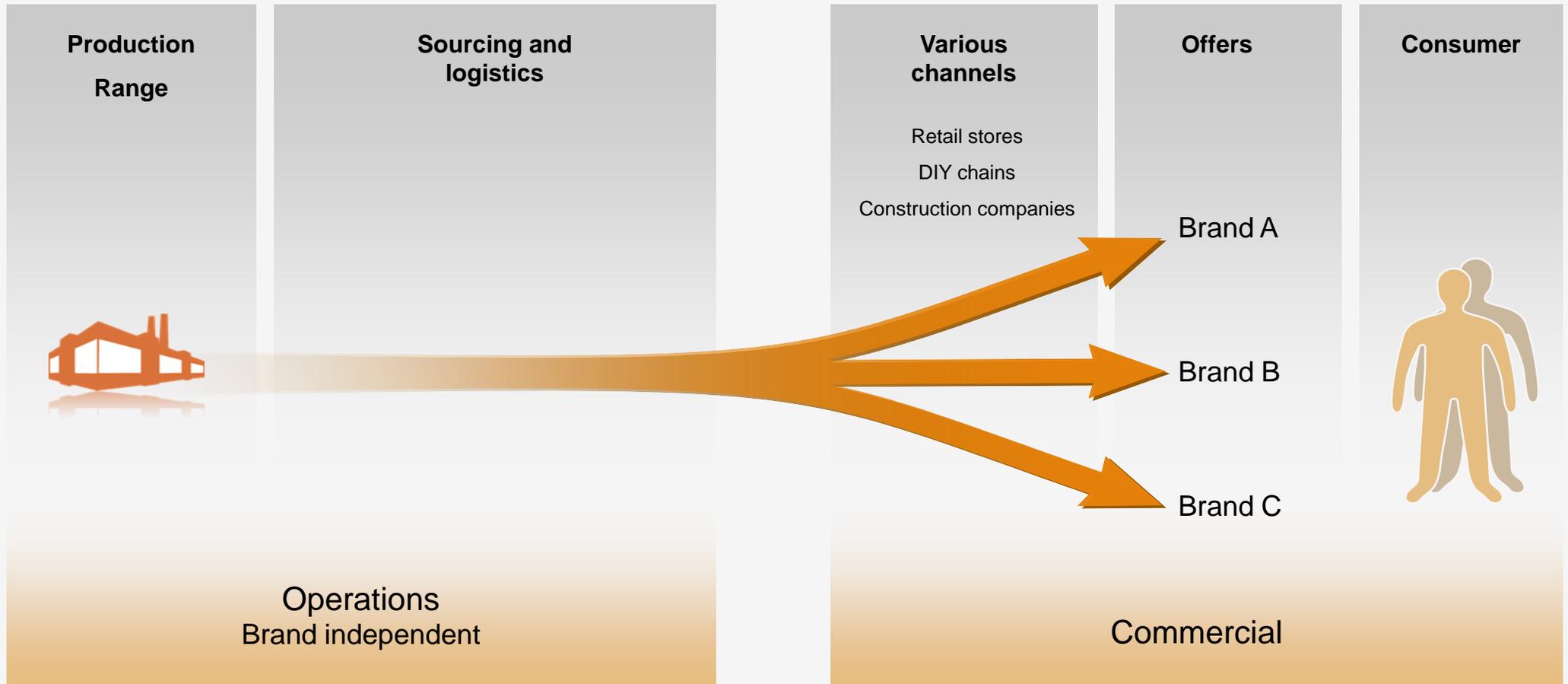
# From 20 to 16 production plants in 2009



# Nobia's production challenges



# Brand/channel-independent supply chain



# How to achieve the required results

Identify and apply best practice

Create standards and  
continuous improvements

Team up

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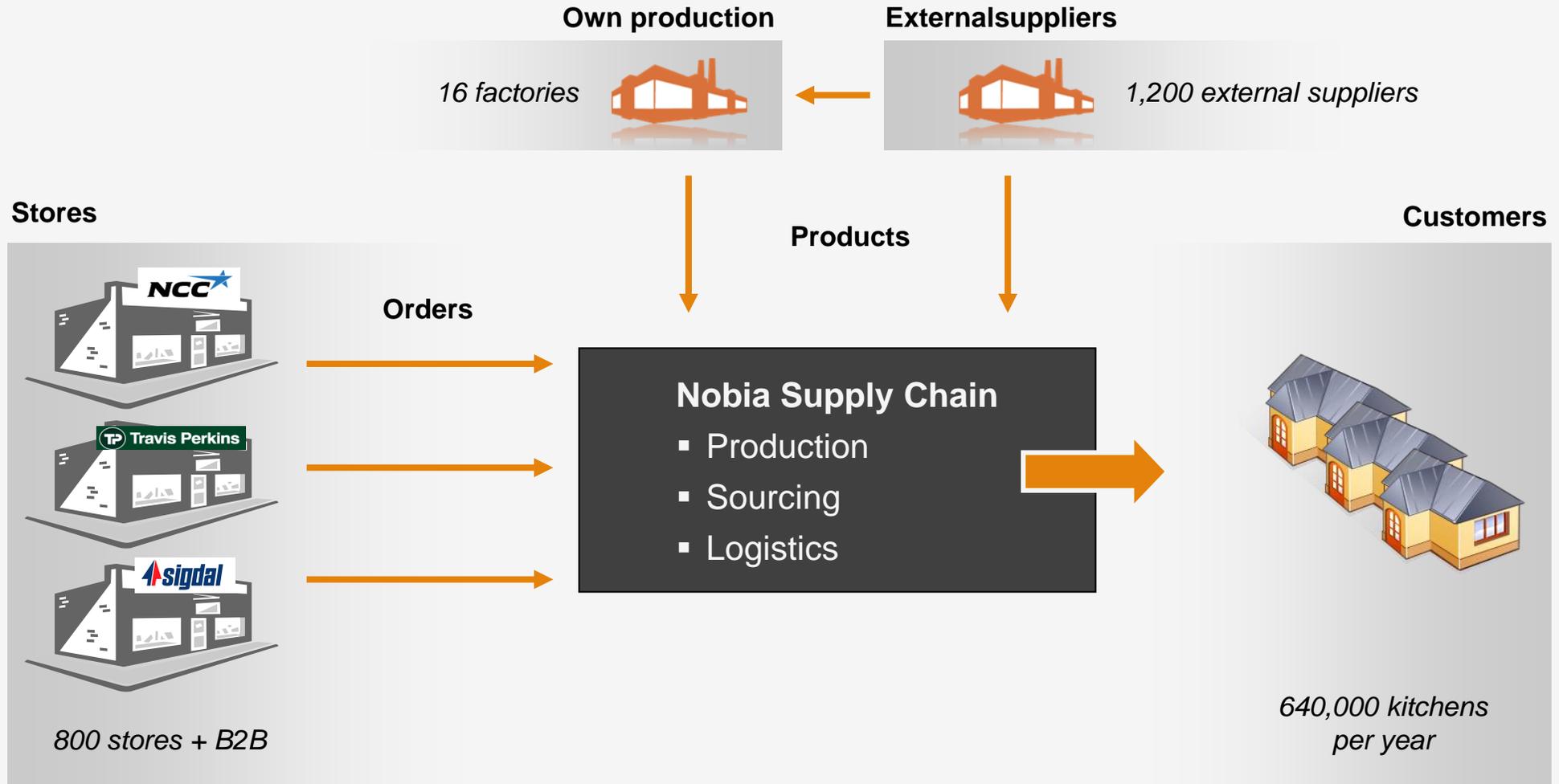


# Sourcing and logistics

Mats Rignell



# Nobia supply chain today



# Our priorities

- Customer focus - Compliance
- Category purchasing and global competition
- Fewer suppliers of products and services regional/global
- One planning concept - sales and operations
- Best practice rules driving improvements – One Nobia
- One common QSE concept and approach – sustainability for performance



Start to build a globally integrated supply chain network



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# Summing up the strategic direction

Preben Bager, CEO



# Everyone benefits

- Customers - attractive offers that are easy to buy
- Employees - an engaging and more stimulating workplace
- Suppliers - volume and growth
- Investors - profitability and growth



# A better way!

Building a stronger Nobia

