

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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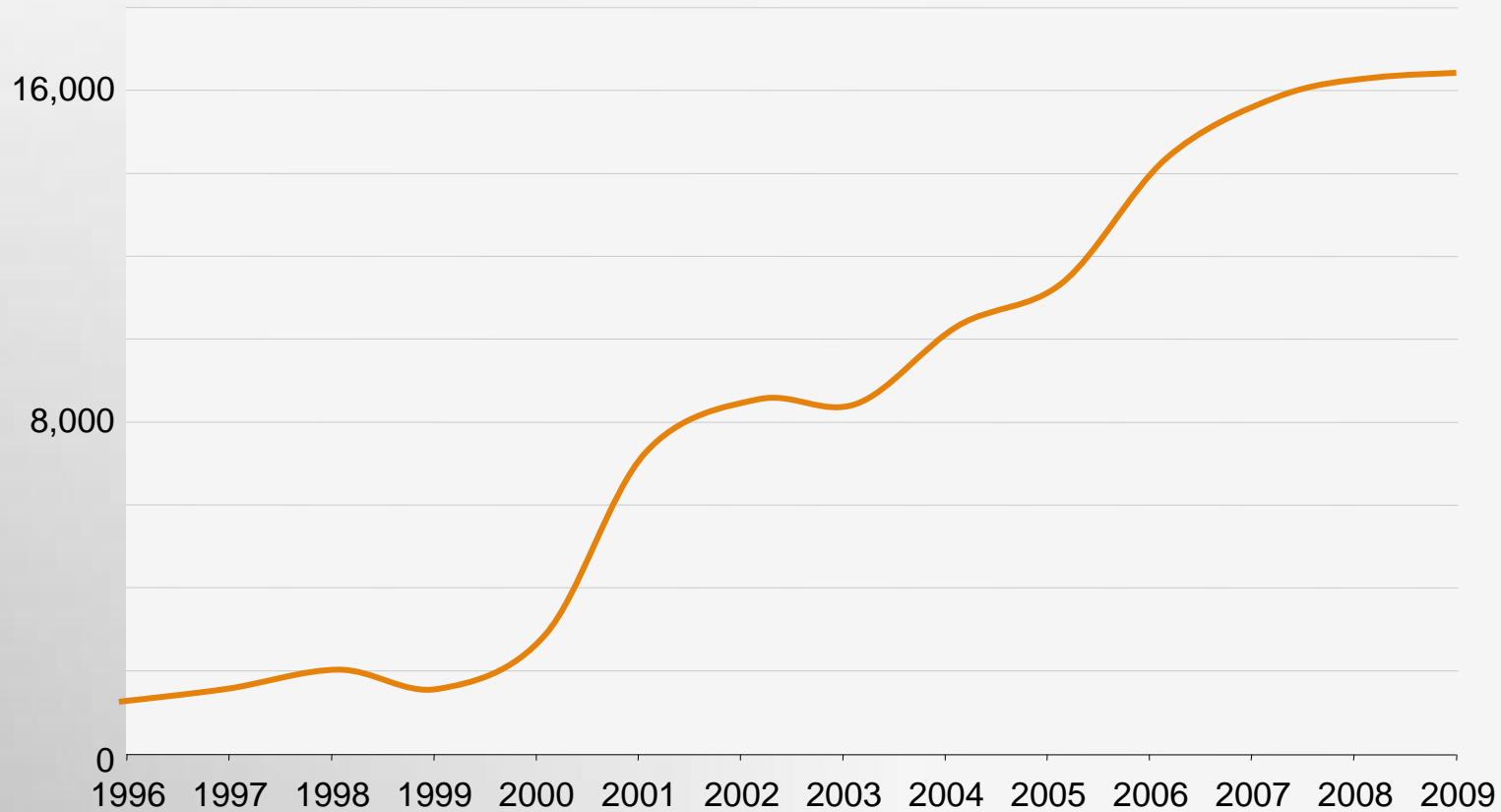
The world-class kitchen specialist

Our vision



Four-fold growth in 10 years

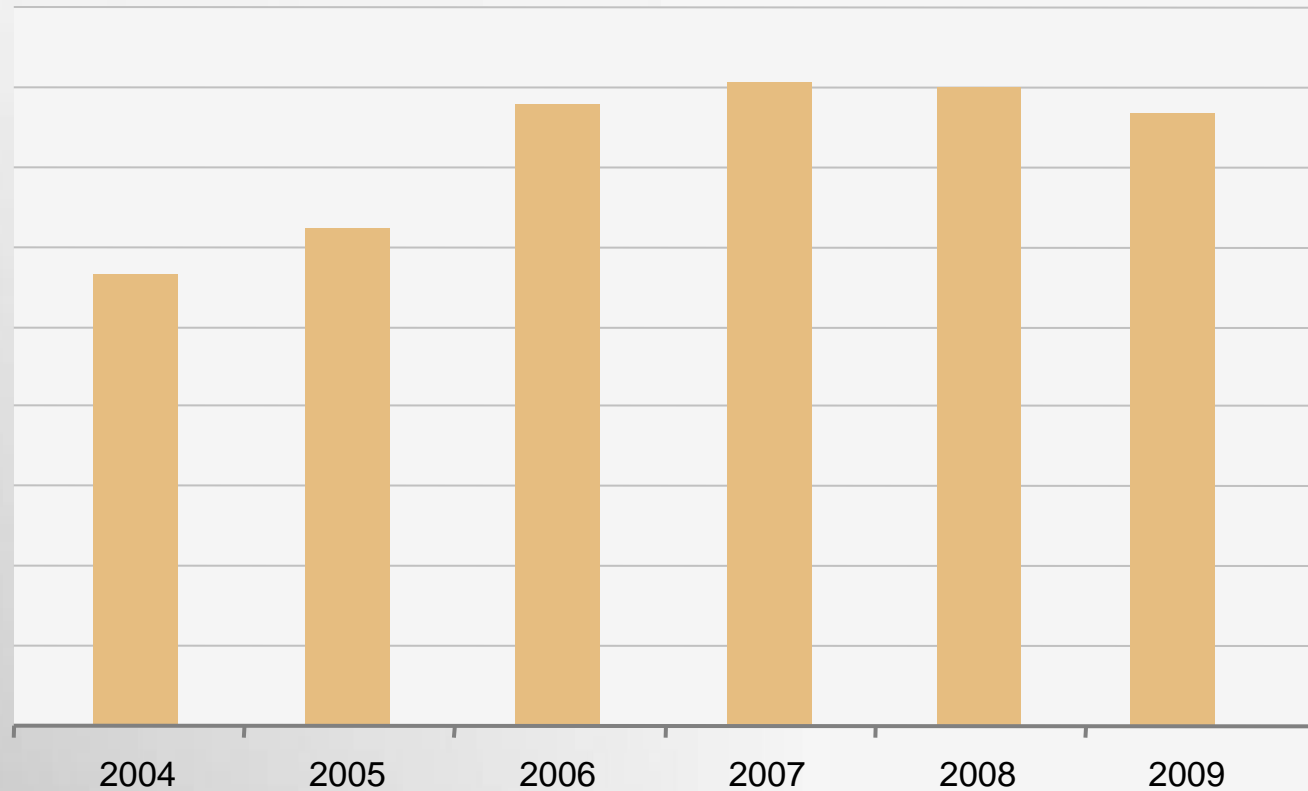
Net sales, SEK m



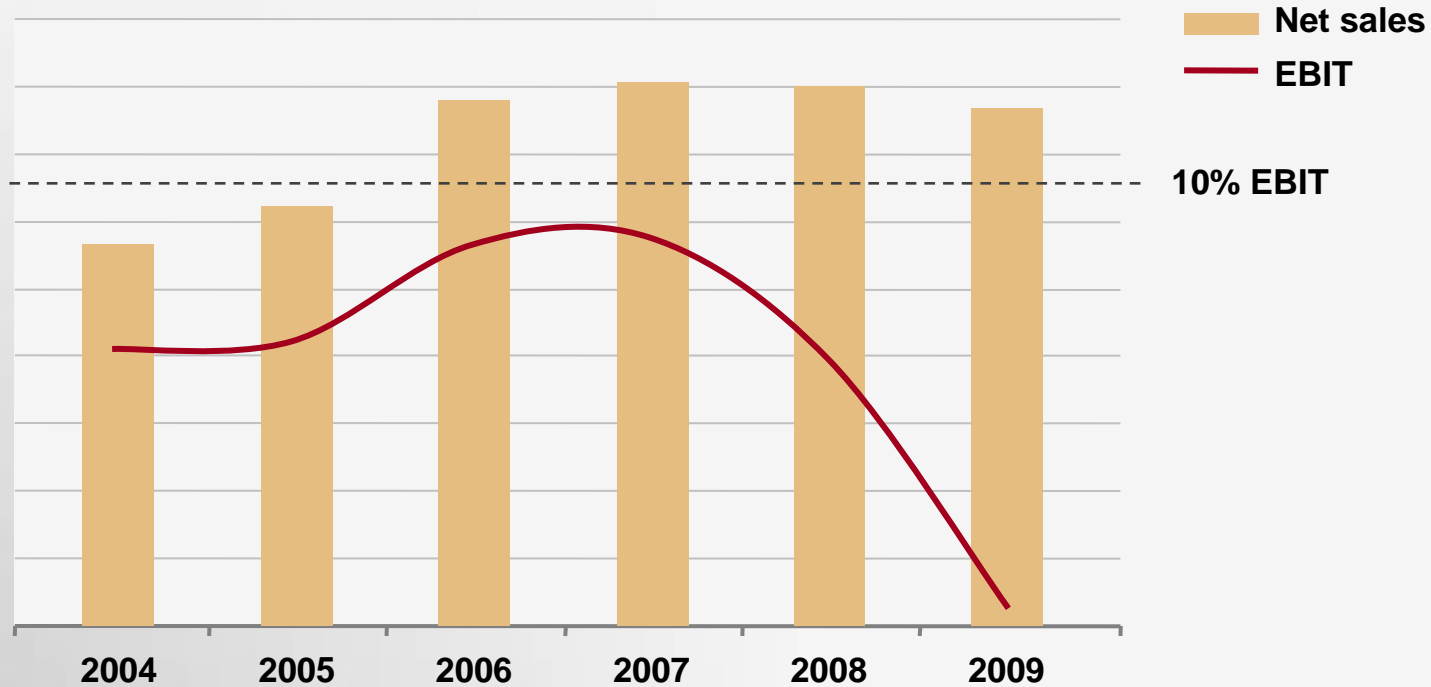
Excluding currency differences

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



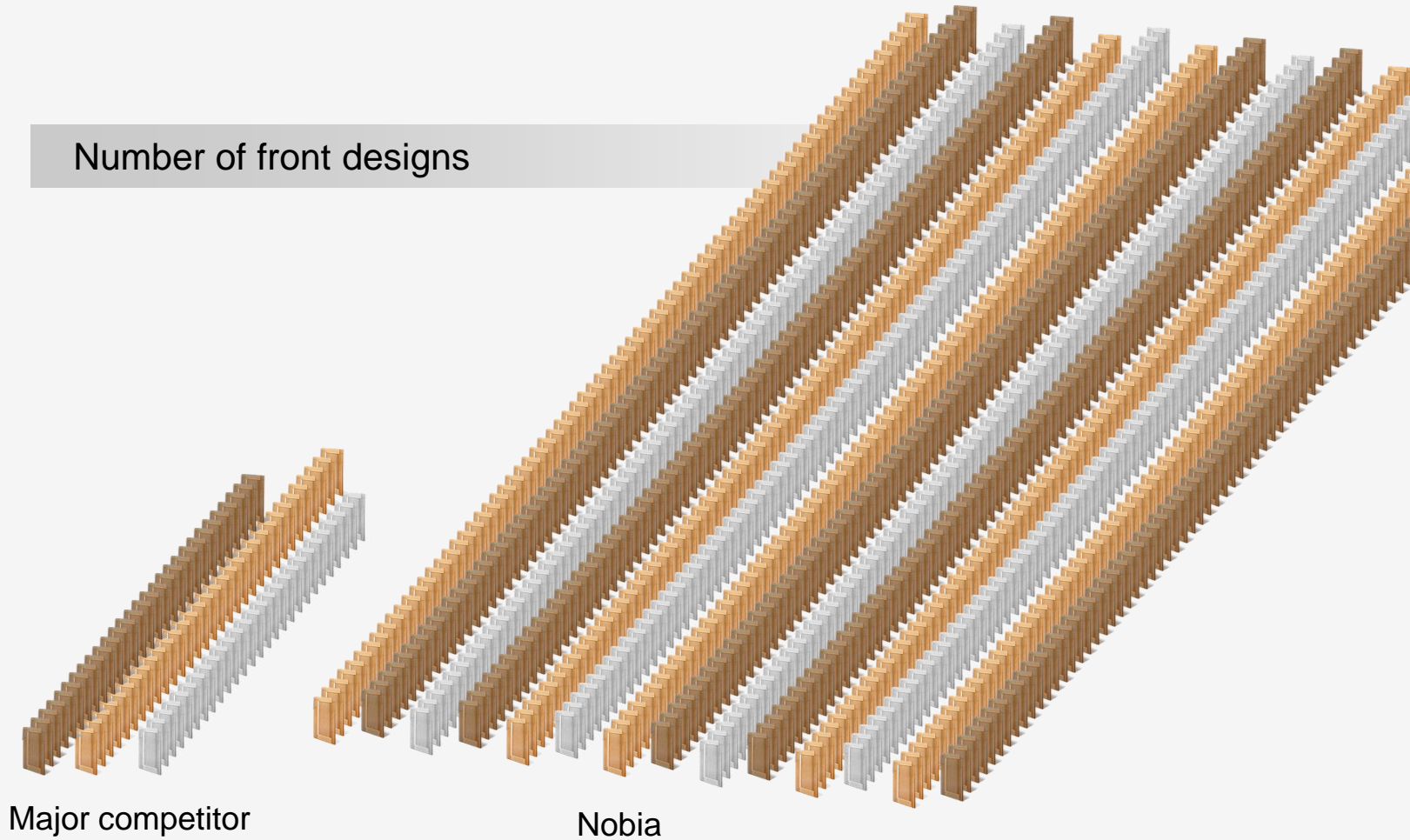
How can we better reach and serve our customers?



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

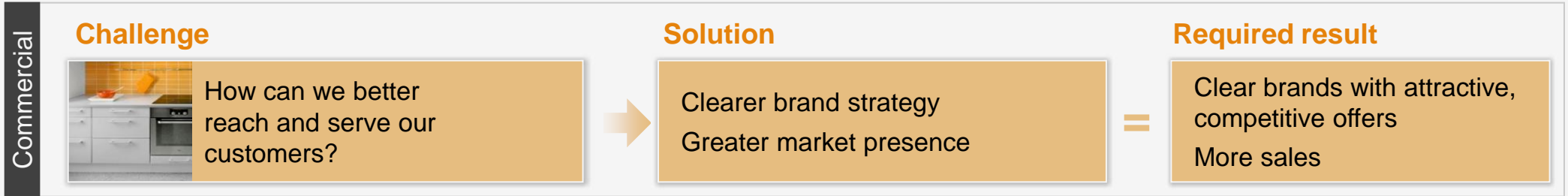


How can we better reach and serve our customers?



How can we become more efficient?

Strategic direction



How do we achieve the required result?

Required results

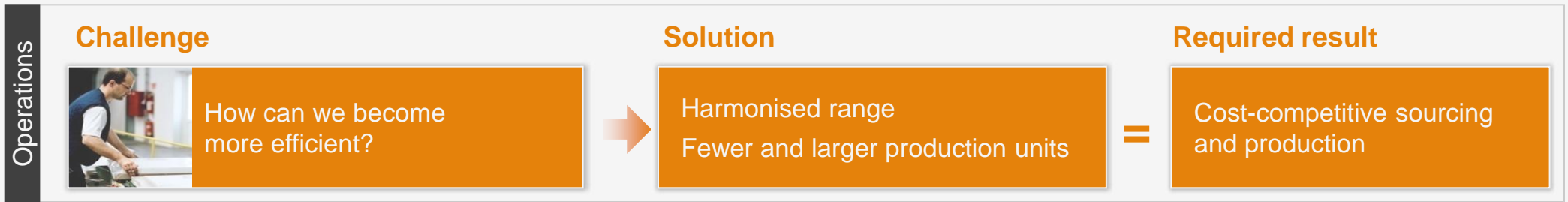
Clear brands with attractive,
competitive offers
More sales

Cost-competitive sourcing and
production

Economy	Middle	Upper middle	Luxury
<ol style="list-style-type: none">1. Scalable concepts2. Clear brand strategy3. Strengthened product development			



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



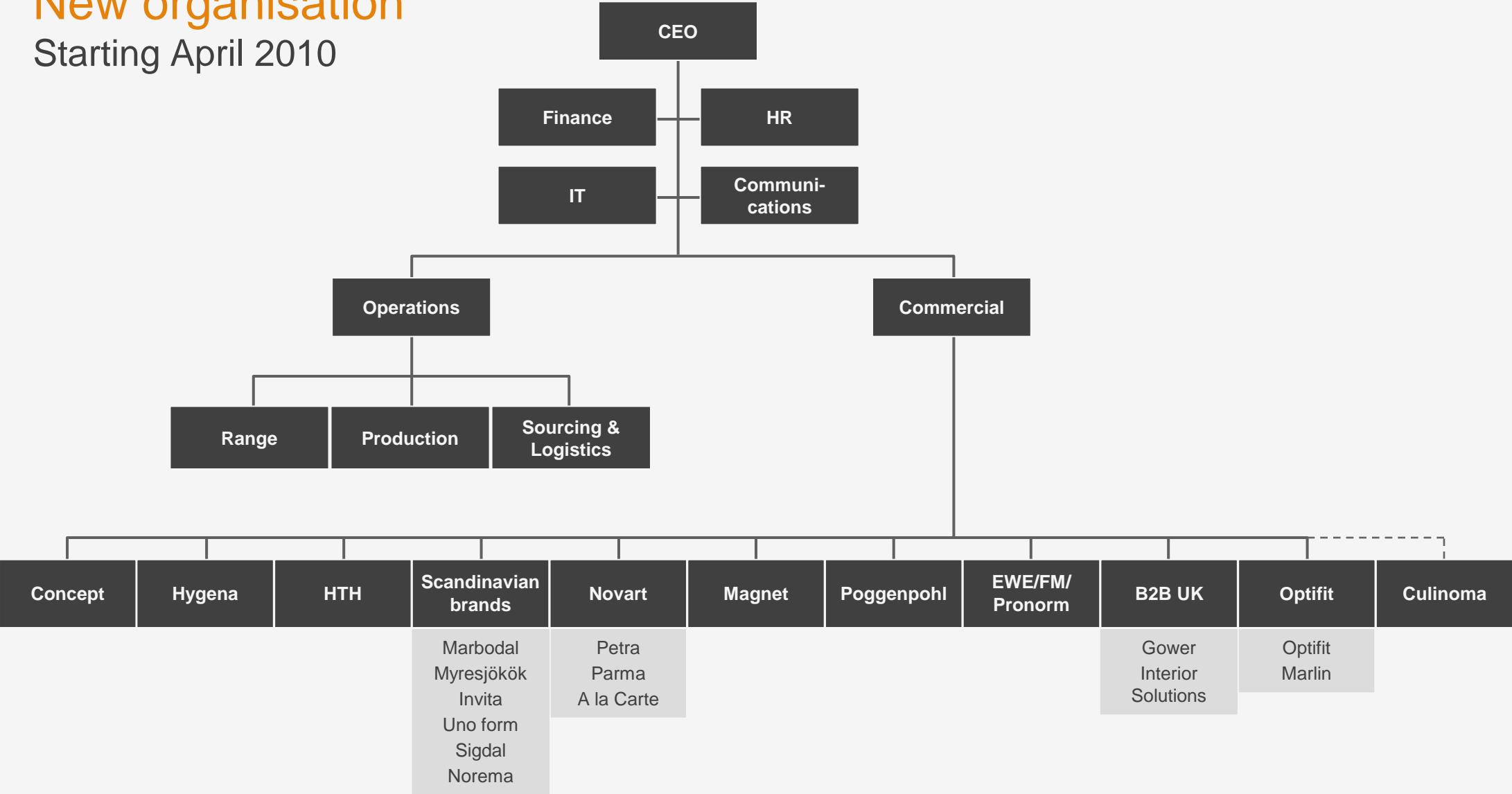
The process starts in April 2010

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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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



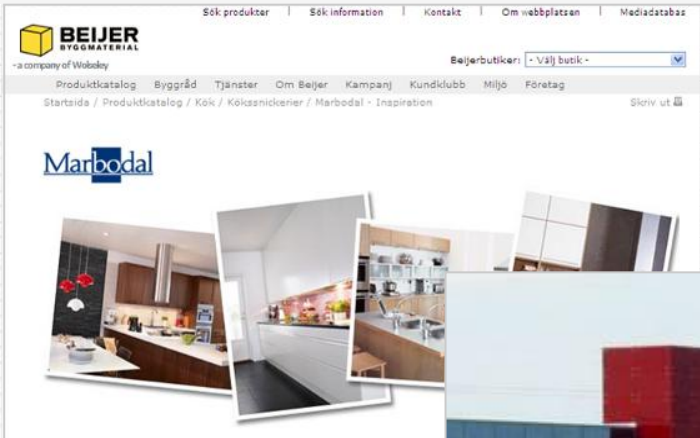
Uno form

	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			
B2B Professionals	Concept 7			

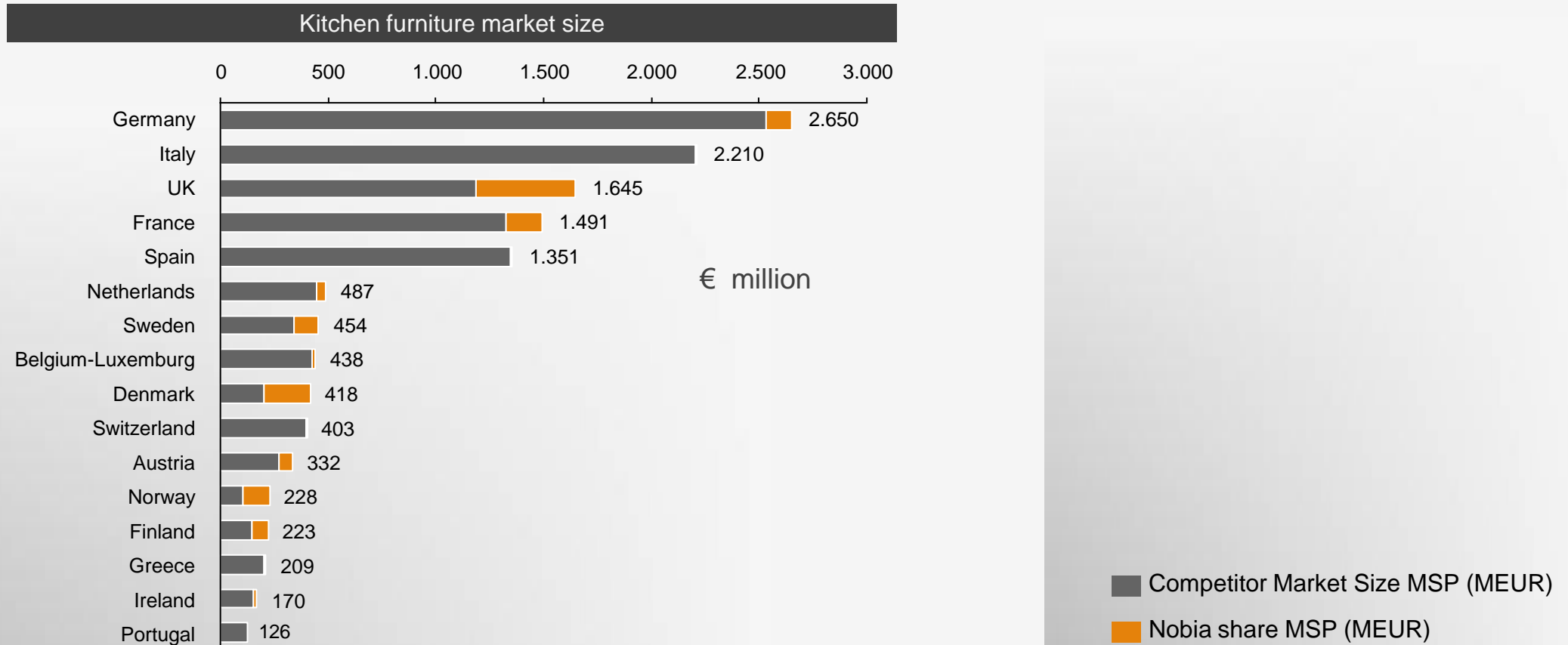
Dimensions that differentiate the concepts

- 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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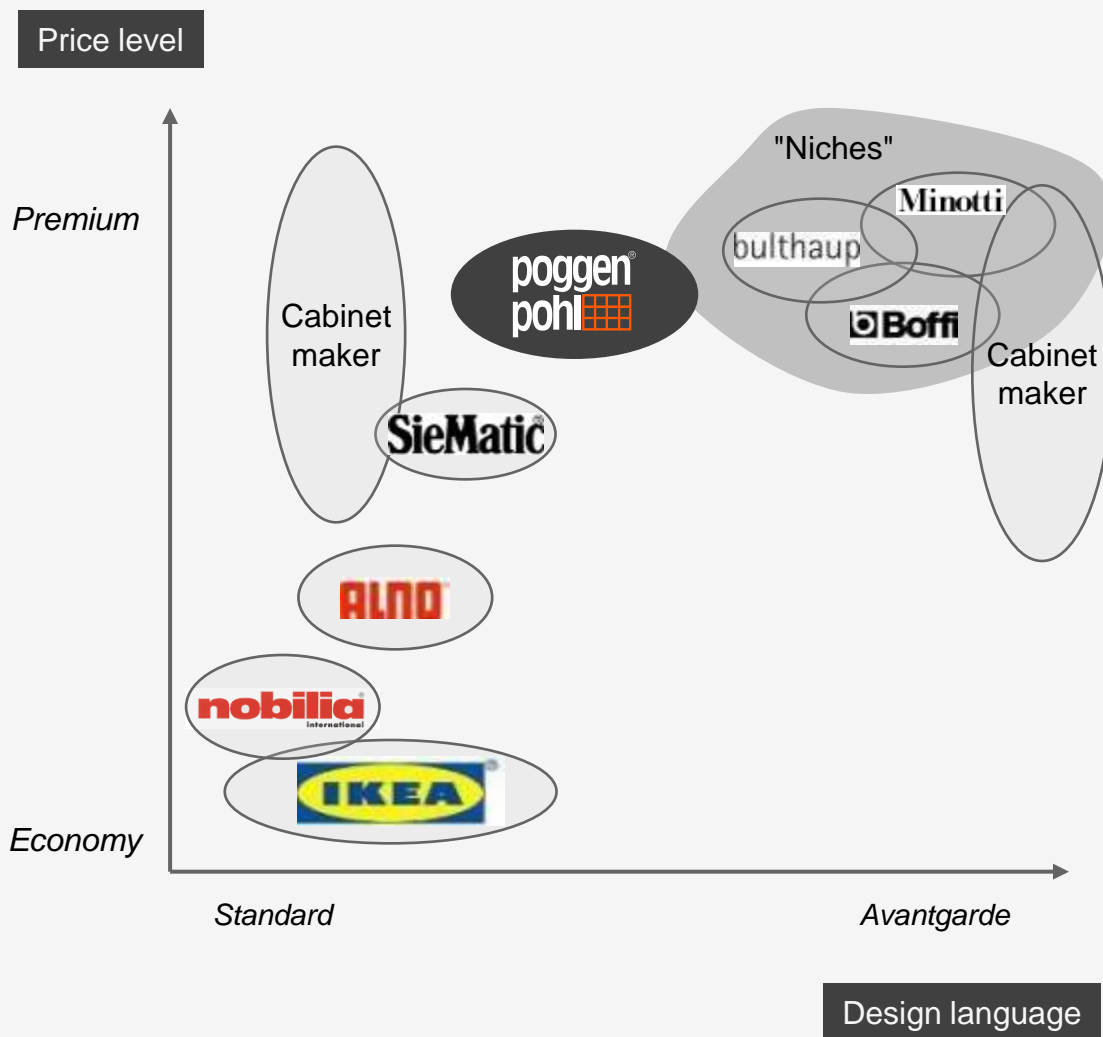


Luxury segment brand: Poggenpohl

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

Project in Dubai – Victory Heights



Location

Dubai, Sports City

Developer

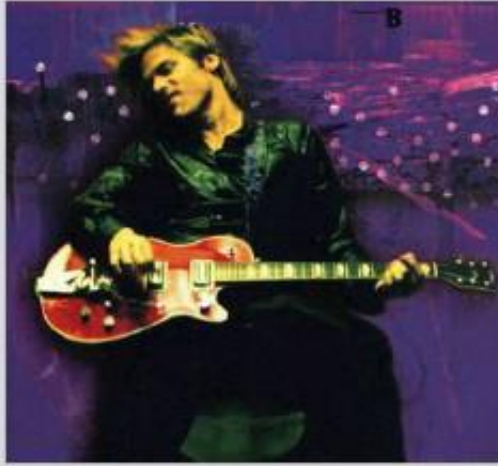
Dubai Sports City

Number of units

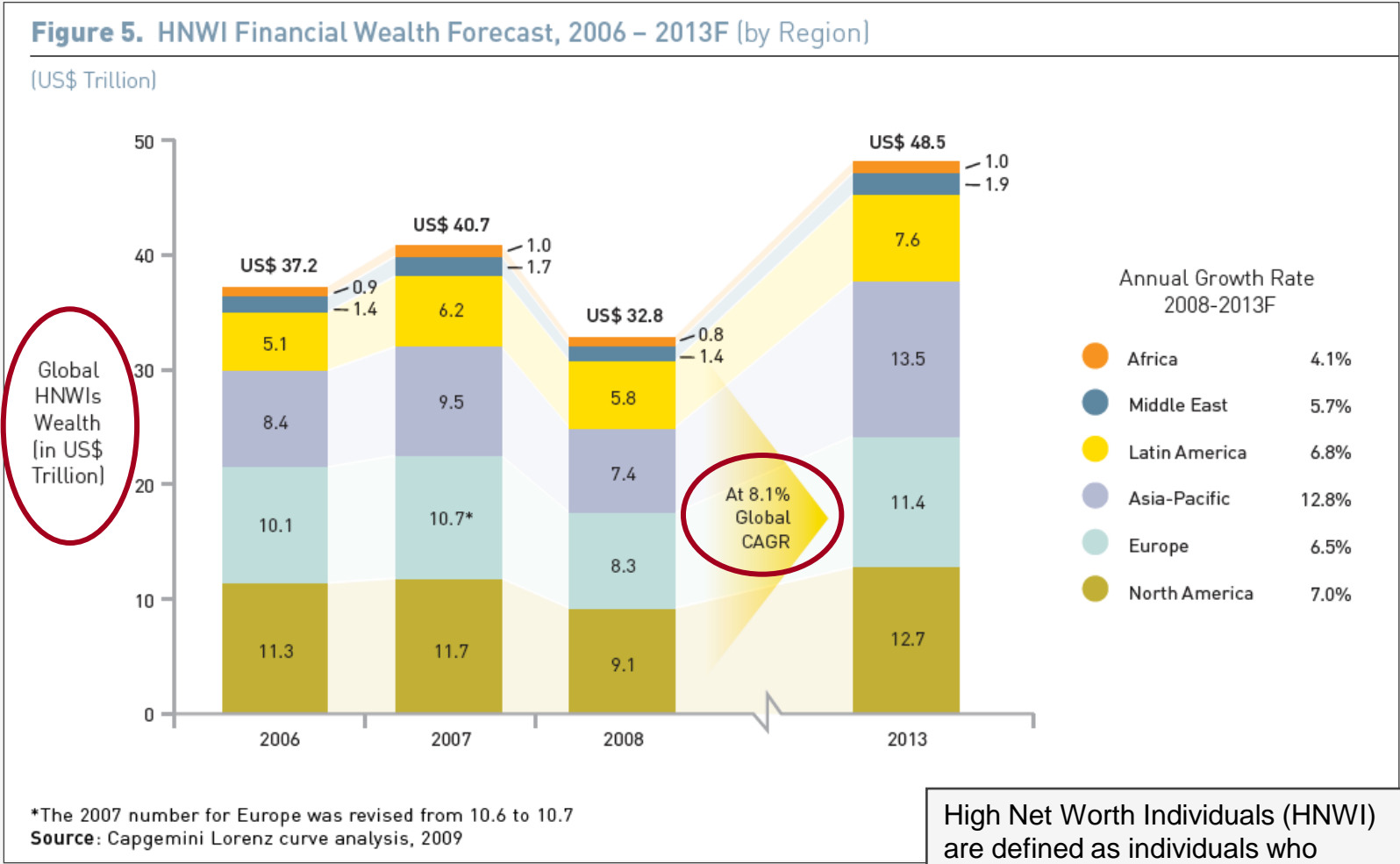
200

<http://www.vh.ae>

Some Poggenpohl customers



Growth of potential luxury consumers



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



Source: Boston Consulting Group, Wealth Market Sizing Database 2009

Distribution via exclusive partners and DOS

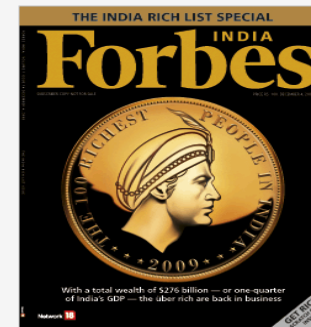


“Of the 50 wealthiest people of **Hong Kong** more than 50 % own a Poggenpohl kitchen. And we are striving for more.”

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



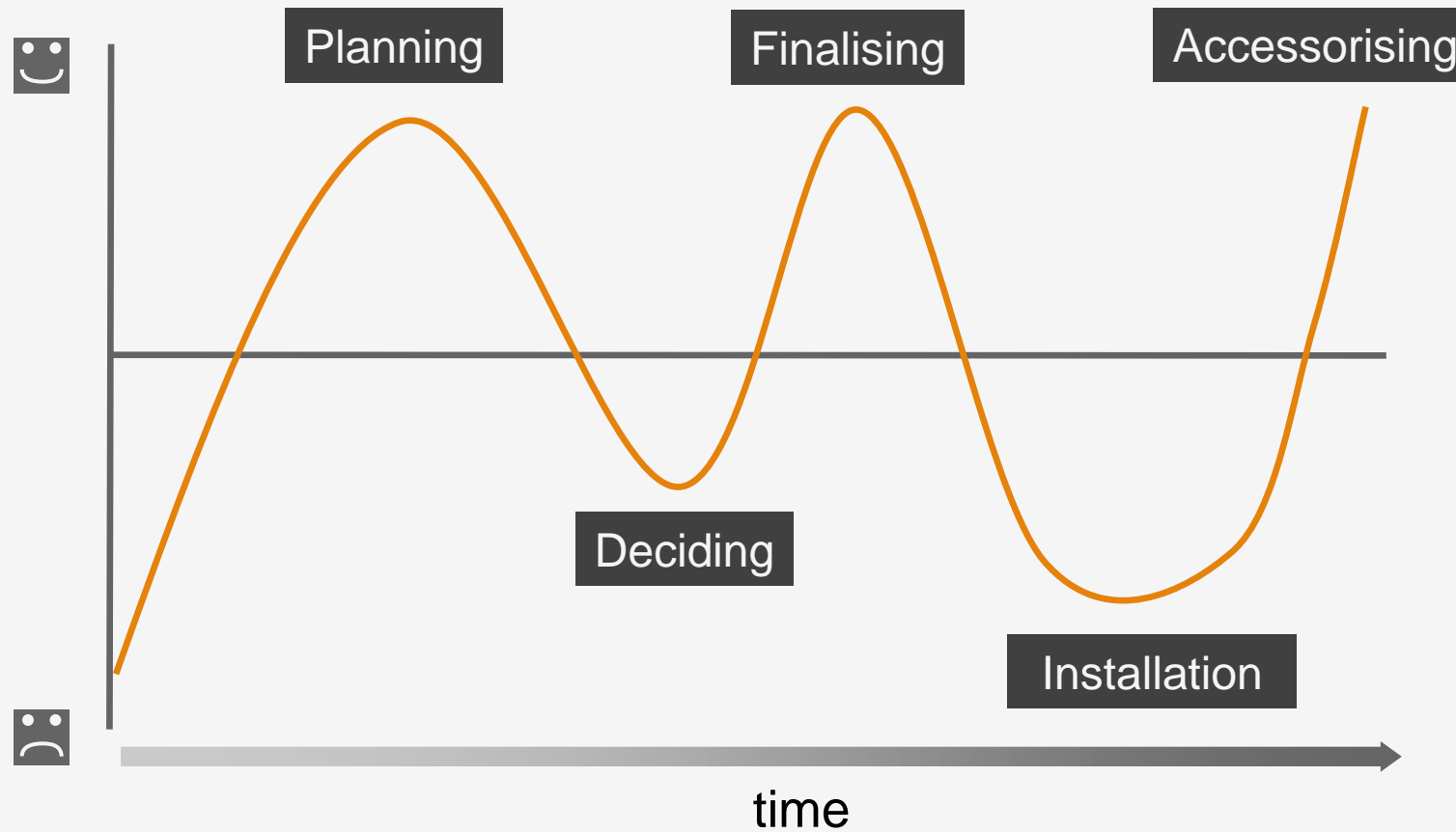
Increase Awareness & Brand Desire



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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Home survey

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



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The main image is a perspective view of a kitchen design. It features dark-stained wooden upper and lower cabinets. The countertop is a light-colored material, possibly quartz or granite. A central island with a matching countertop provides additional workspace and seating. Stainless steel appliances, including a refrigerator, oven, and range hood, are integrated into the cabinetry. The backsplash consists of small, square tiles in a mix of grey and white tones. Pendant lights hang over the island, and recessed lighting is installed in the ceiling.

To the right of the main image is a technical drawing, likely a floor plan or elevation, overlaid on a green grid. It shows the layout of the kitchen with various components labeled:

- Cabinets:** "Cabinet Top Overlay Granite Material" and "Cabinet Bottom Overlay Granite Material".
- Countertops:** "Countertop Overlay Granite Material".
- Appliances:** "Refrigerator", "Oven", "Range Hood", "Sink", "Stove", "Dishwasher".
- Dimensions:** Various measurements are provided, such as "800mm Wide Wall", "800mm High Wall", "1600mm Total Width", and "2400mm Total Depth".
- Callouts:** Blue arrows point from specific labels to their corresponding elements in the drawing.

- [illegible]



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



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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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Contract

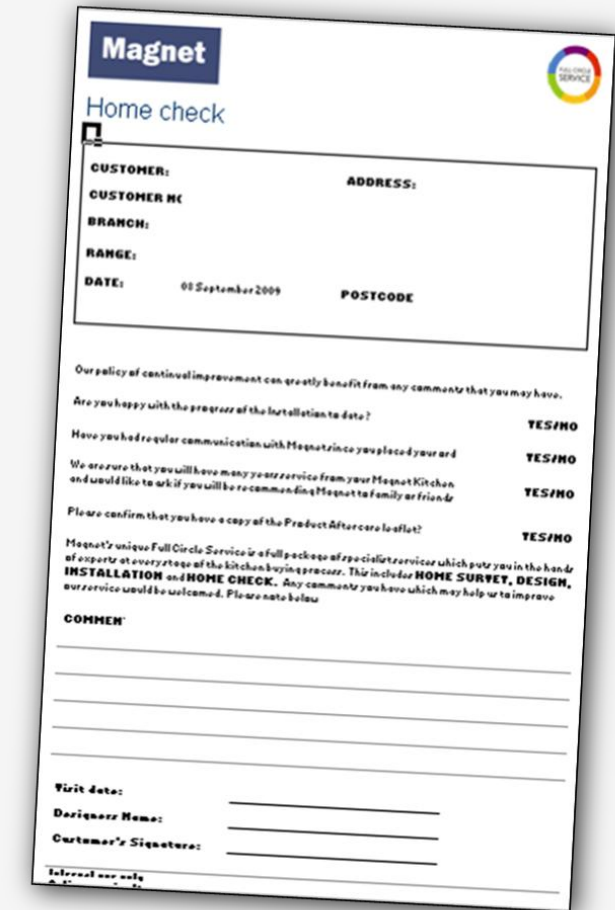
Delivery

Install

Home
Check

Home check

- Designer visits customer's home 14 days after delivery to confirm customer satisfaction
- Follow-up call from the centre 28 days after installation



The image shows a 'Magnet Home check' form. At the top left is the 'Magnet' logo, and at the top right is a circular logo with the text 'FULL CIRCLE SERVICE'. The title 'Home check' is prominently displayed. Below the title is a form with fields for 'CUSTOMER:', 'ADDRESS:', 'CUSTOMER NO:', 'BRANCH:', 'RANGE:', 'DATE:' (with '08 September 2009' as an example), and 'POSTCODE:'. The form then contains several questions with 'YES/NO' response options: 'Are you happy with the progress of the installation to date?', 'Have you had regular communication with Magnet since you placed your order?', 'We are sure that you will have many years service from your Magnet Kitchen and would like to ask if you will be recommending Magnet to family or friends?', and 'Please confirm that you have a copy of the Product Aftercare leaflet?'. A paragraph of text explains Magnet's 'Full Circle Service' and mentions 'HOME SURVEY, DESIGN, INSTALLATION and HOME CHECK'. Below this is a section for 'COMMENTS' with several lines for writing. At the bottom, there are fields for 'Visit date:', 'Designer's Name:', 'Customer's Signature:', and 'Internal use only'.

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Summary of retail sales process



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Middle segment brand: HTH

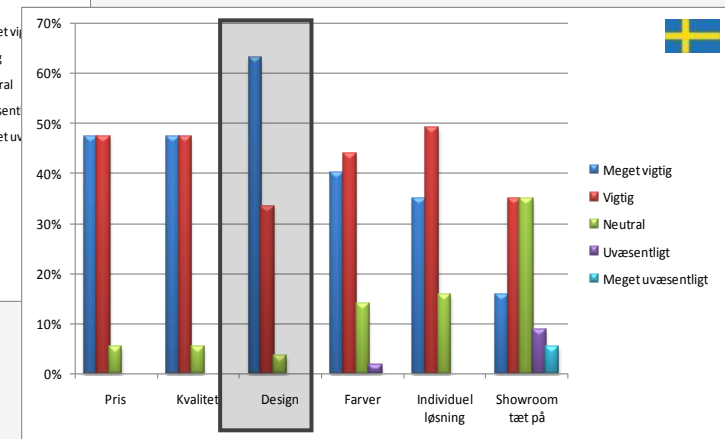
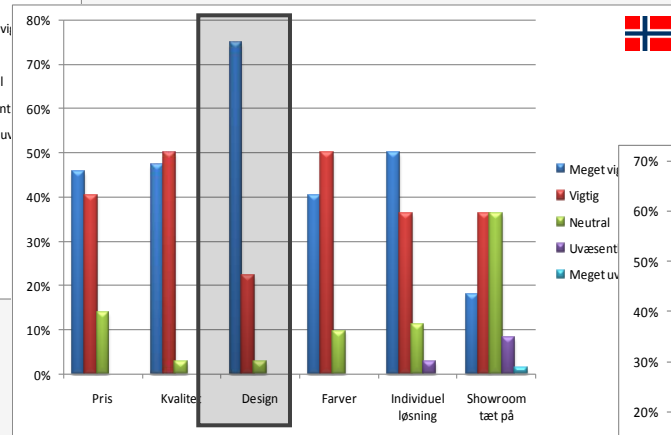
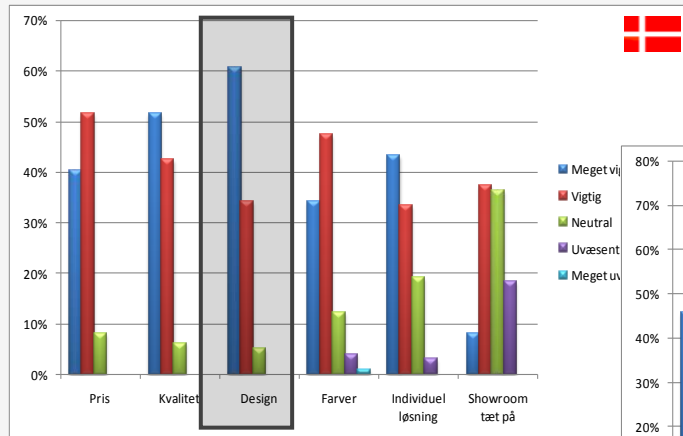
Henrik Karup Jørgensen



Consumer decision factors



What is important to you when choosing a new kitchen?

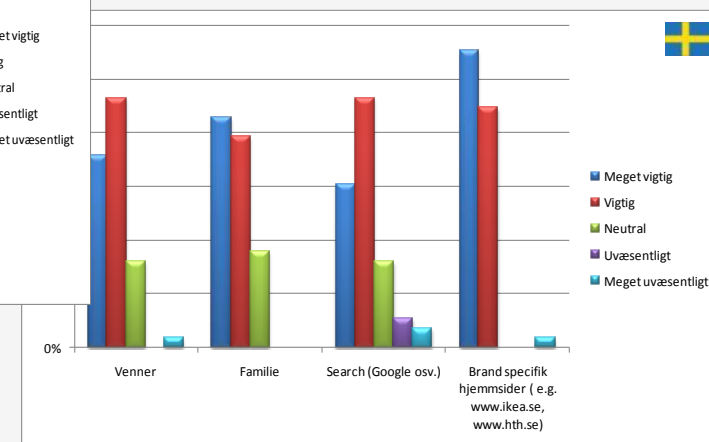
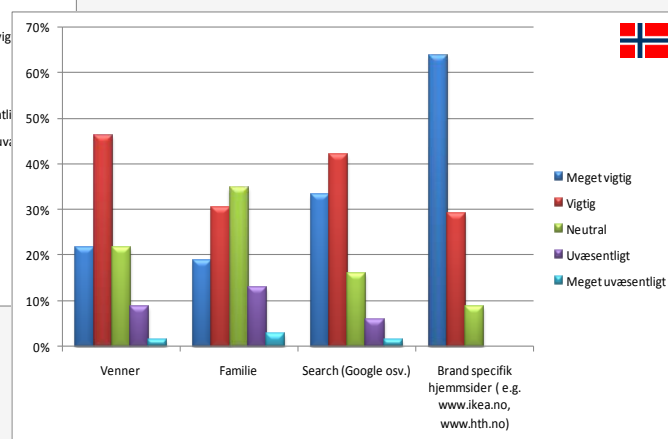
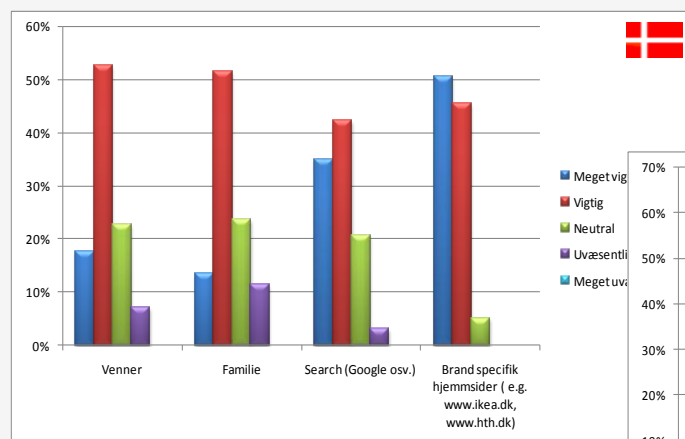


Design, individual solutions and "value for money" are key factors

Consumer sources for inspiration



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

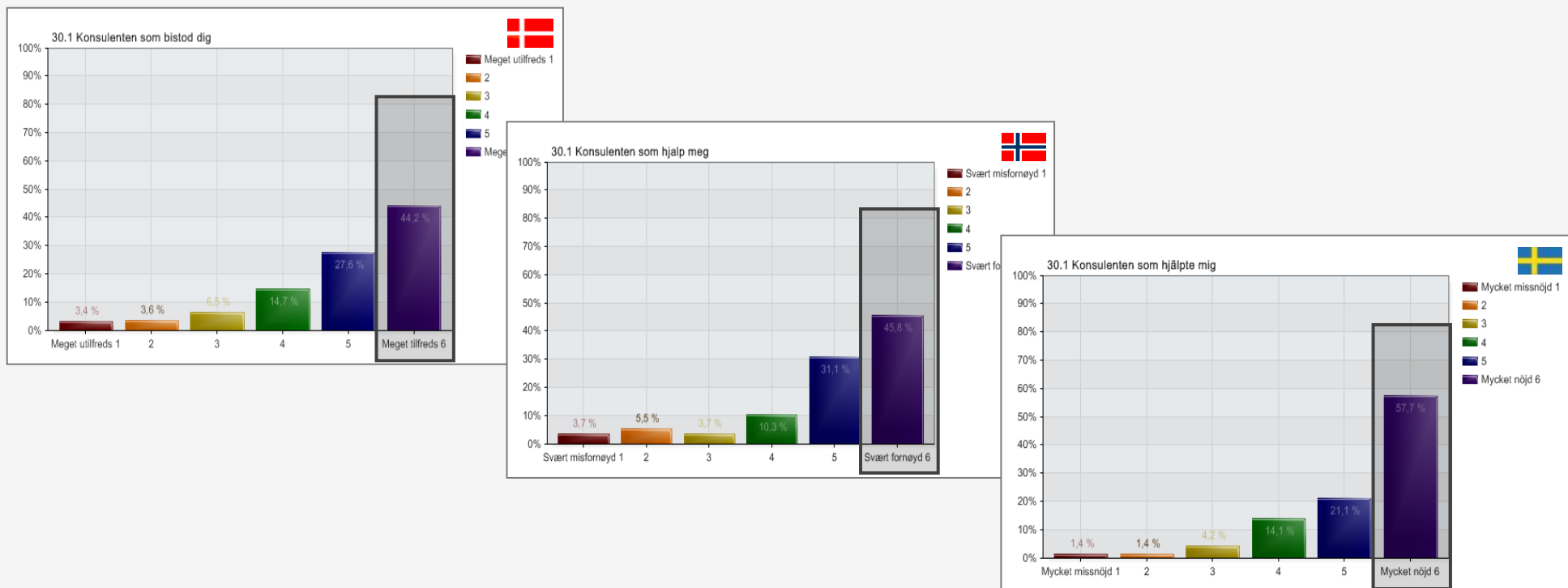


Recommendations are important but the internet is also a major factor when seeking information and inspiration

Consumer satisfaction with staff



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

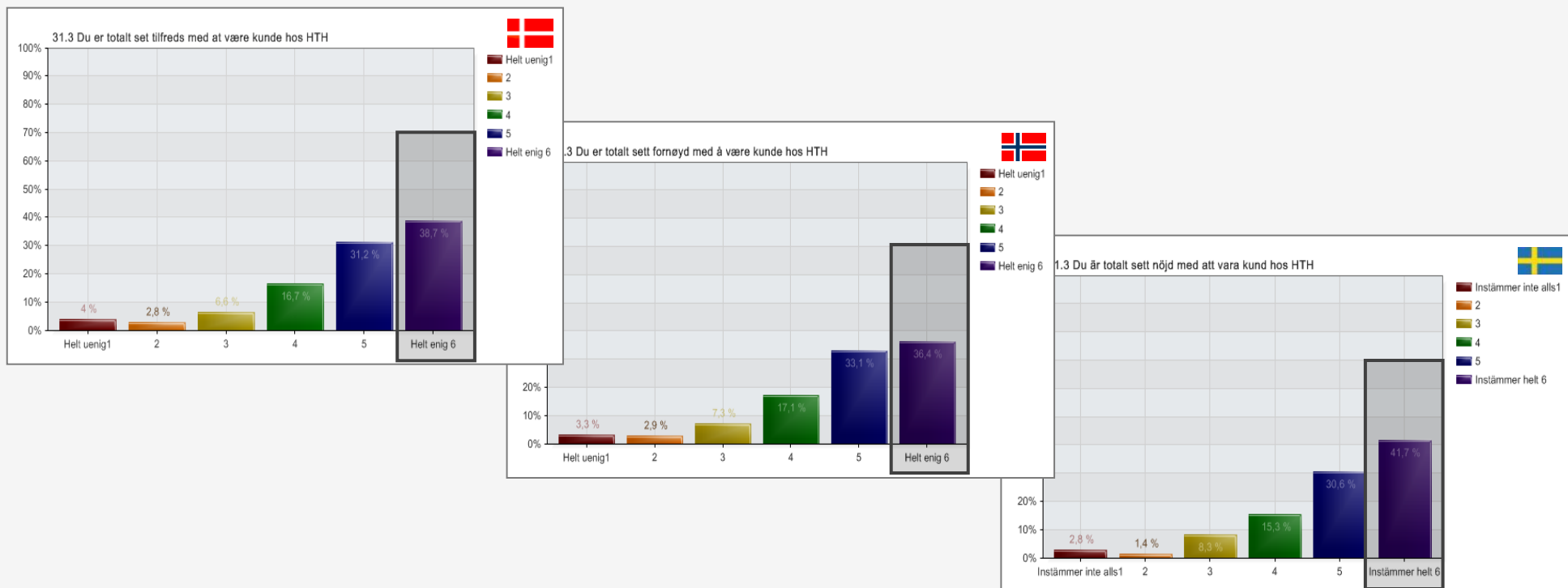


The consumers are extremely satisfied with the service of the HTH sales consultants

Overall consumer satisfaction



How satisfied are you overall as an HTH customer?



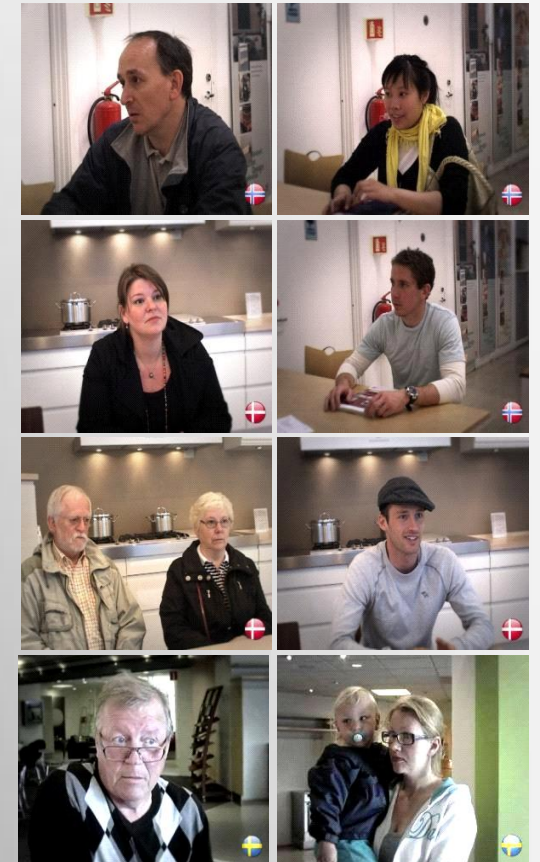
Satisfaction levels are generally very high

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 klick

– 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

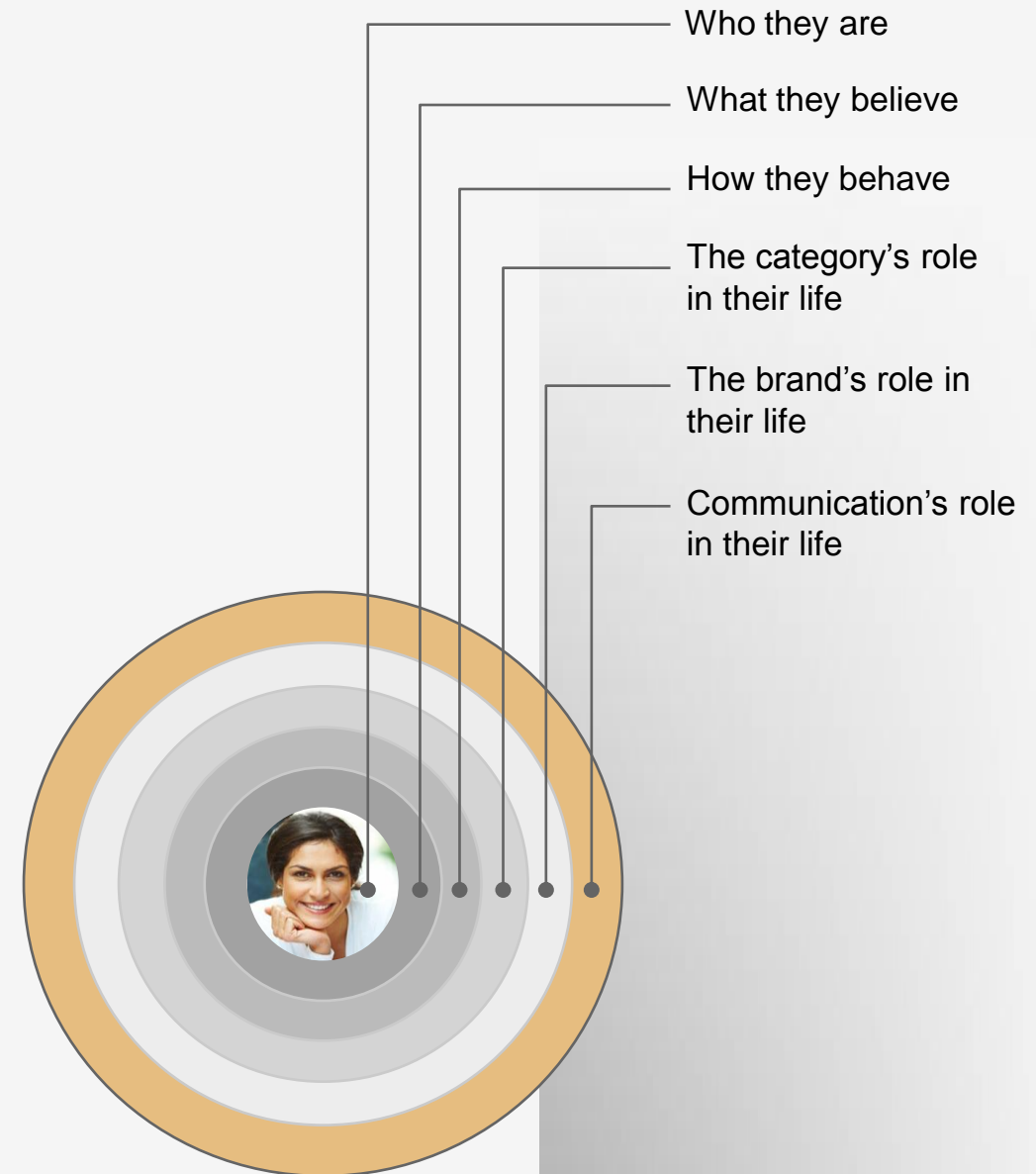
Nick Friend



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 mark



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



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Preben Bager, CEO

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Elmar Duffner

Peter Kane

Henrik Karup Jørgensen

Nick Friend

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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

sigdal



poggen
pohl

Interior
solutions



Gower

Optifit

pronorm

Alca Cante

Marbodal

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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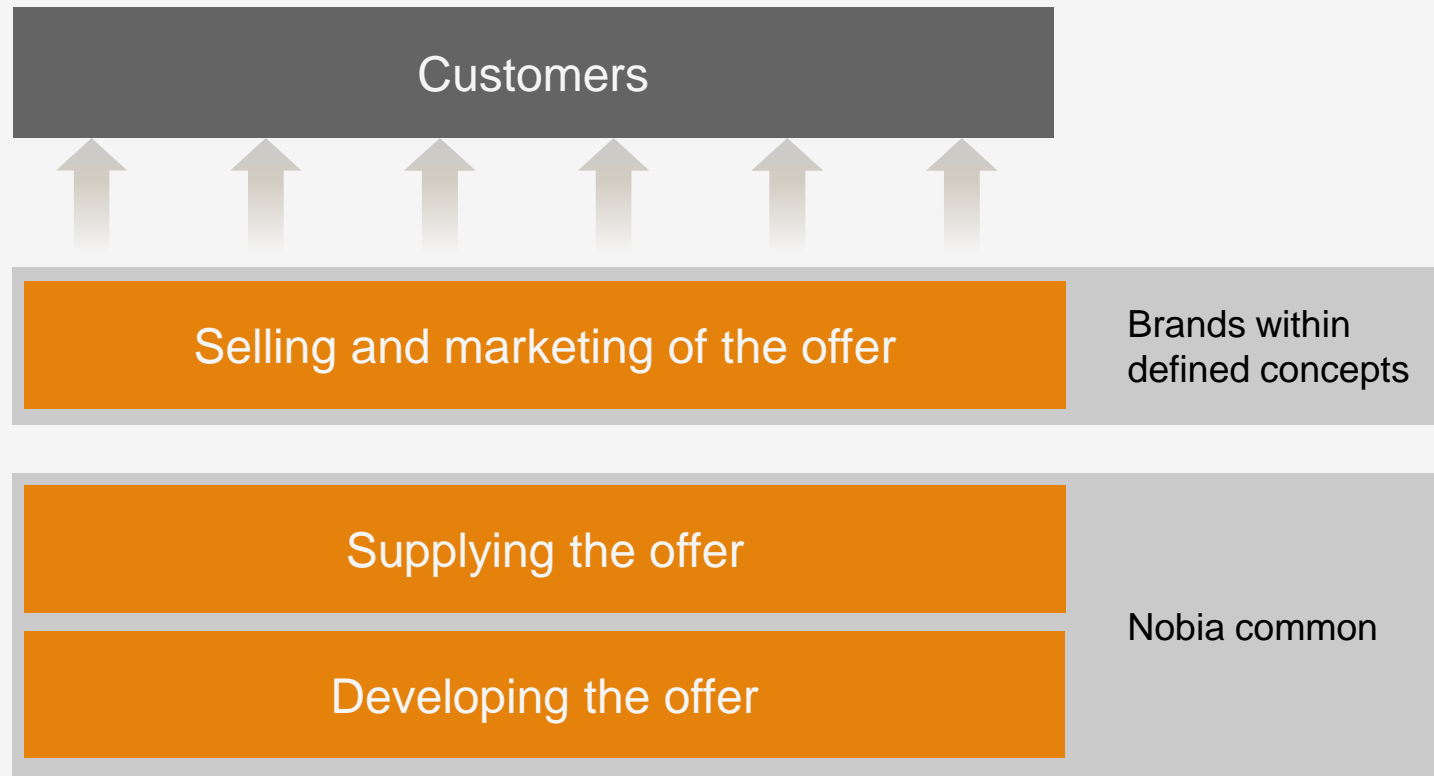


Delivering world-class kitchens

Göran Westerberg, COO



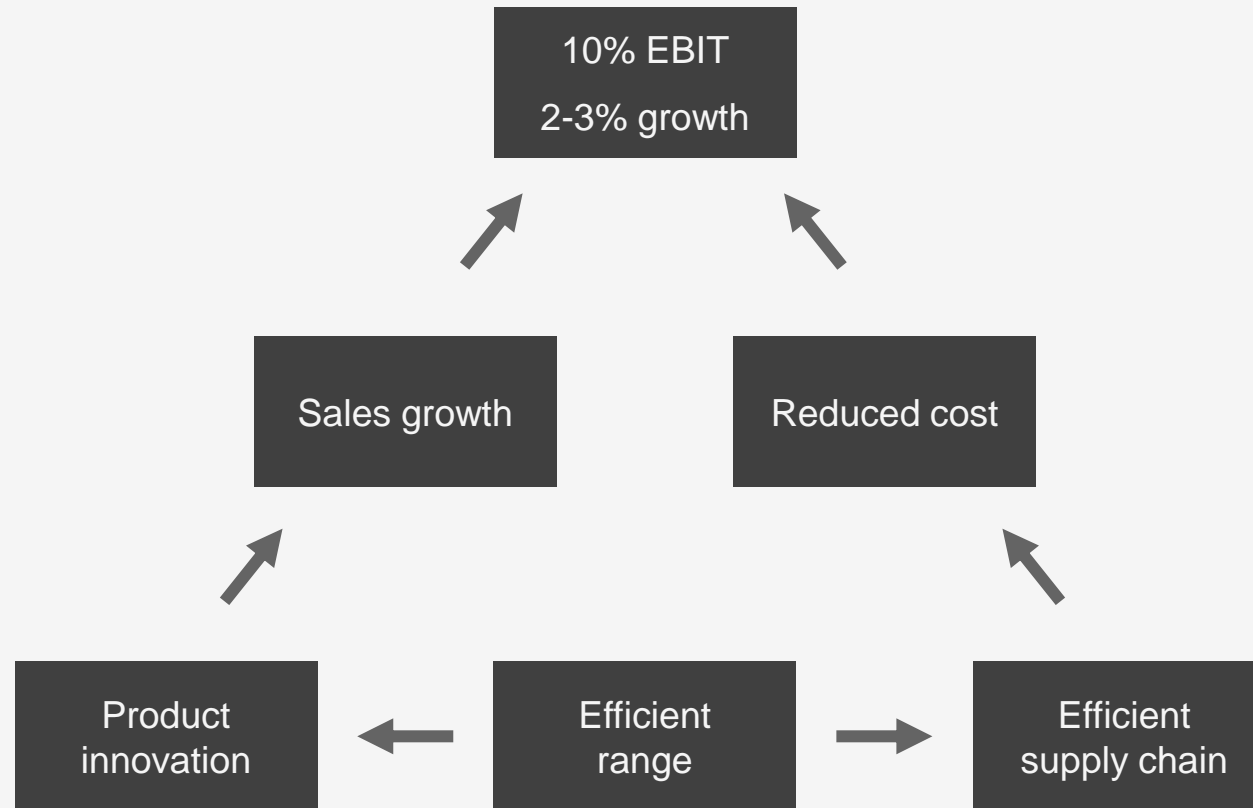
Nobia's value chain



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



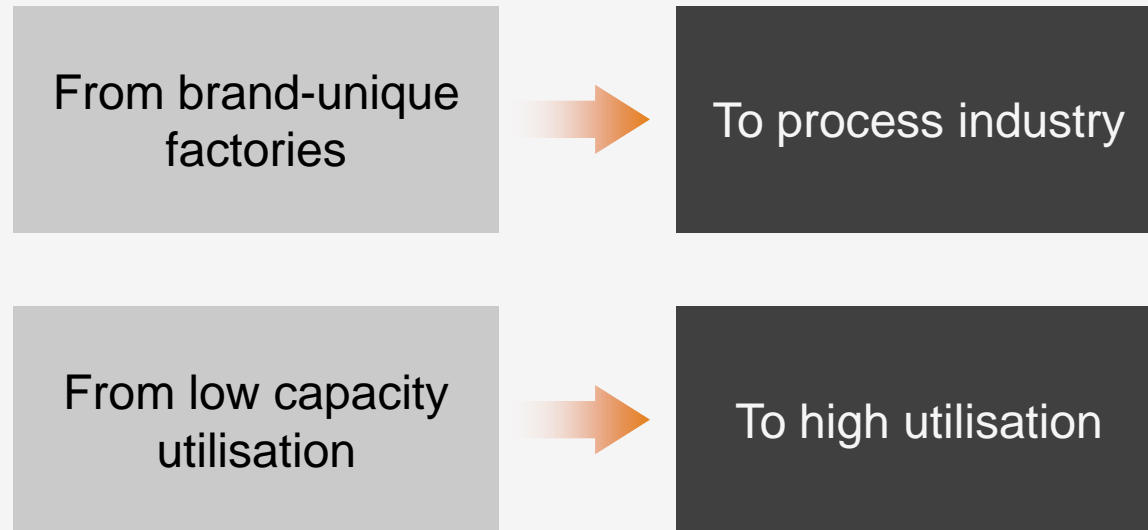
Creating conditions for growth and profit



Reduced complexity through the supply chain

Nine platforms → One European platform

Conditions for efficiency



Production structure

Past

Vertically integrated plants

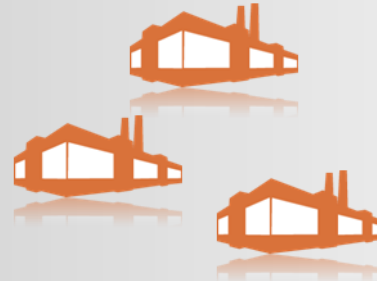
- Components
- Assembly
- Distribution



Today

Plants for several brands

- Components
- Assembly
- Distribution



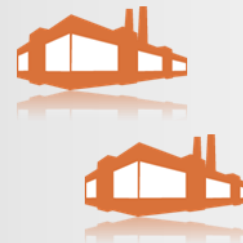
Implemented 2009:

- Finland
- Norway/Sweden
- Denmark

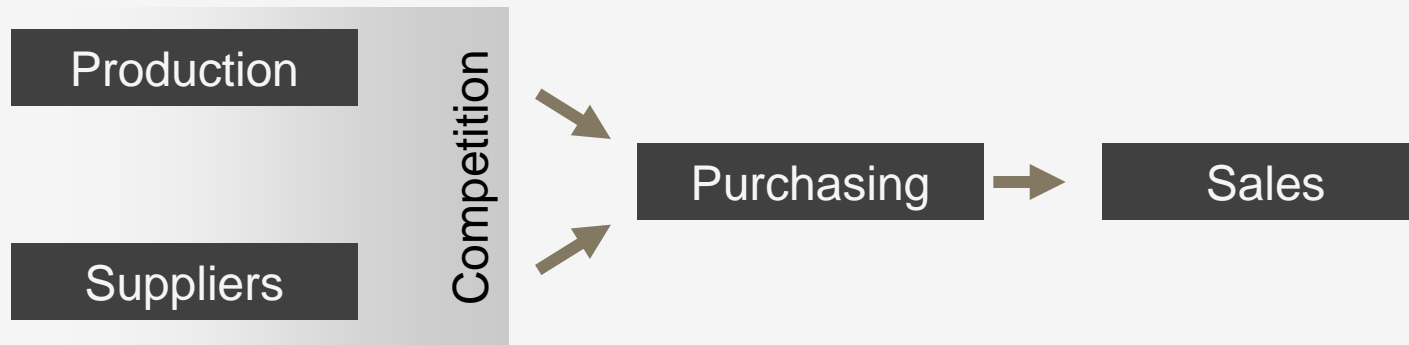
Tomorrow

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

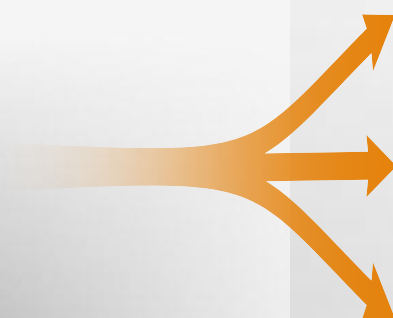
We are not the first industry to build on platforms





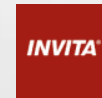
Volkswagen PQ35

- 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

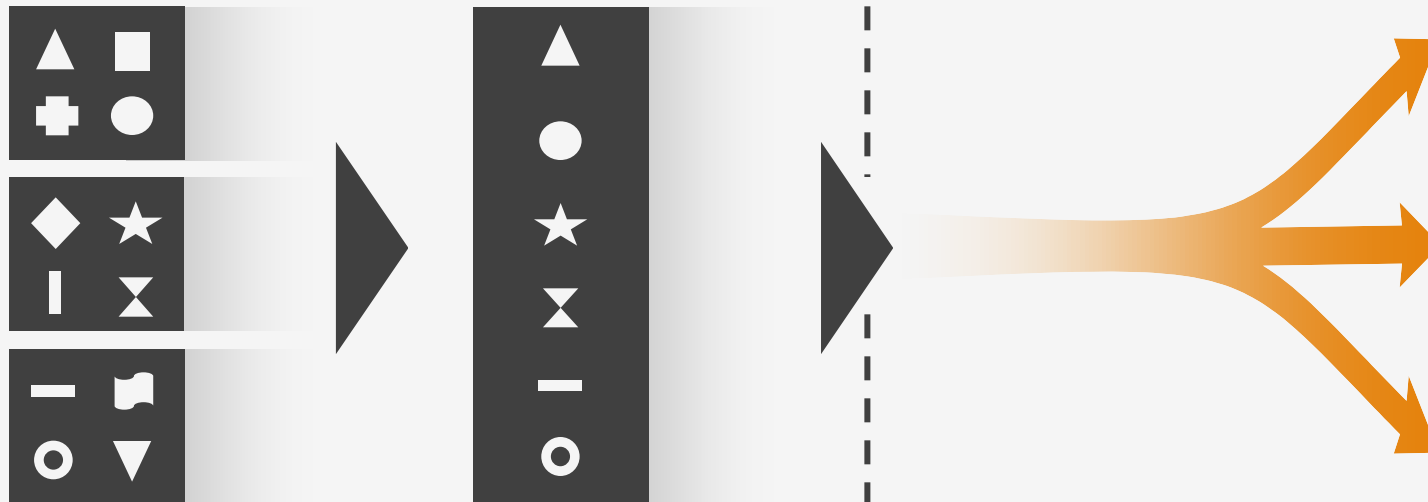




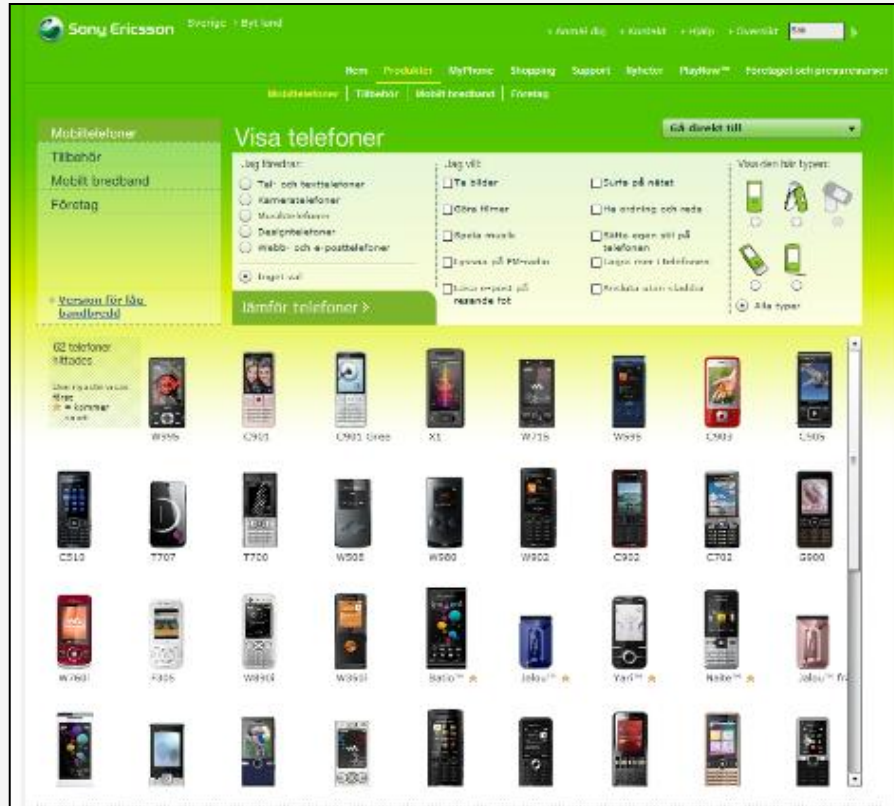
Nobia K20



A common platform gives us more opportunities

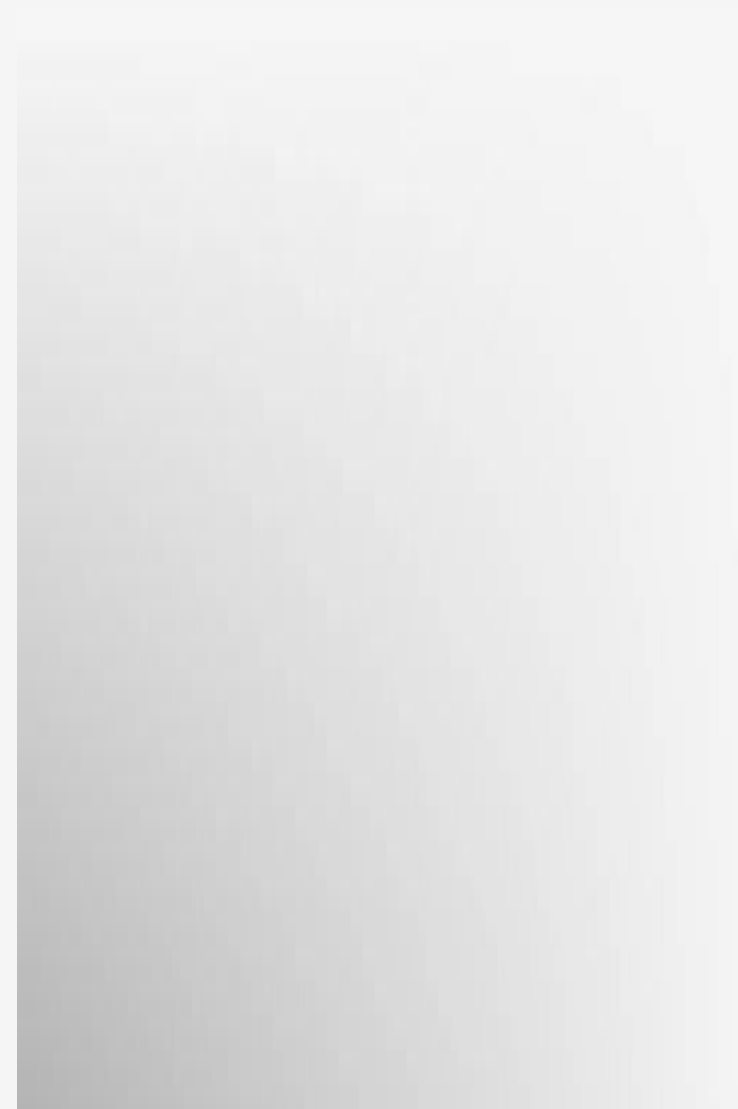
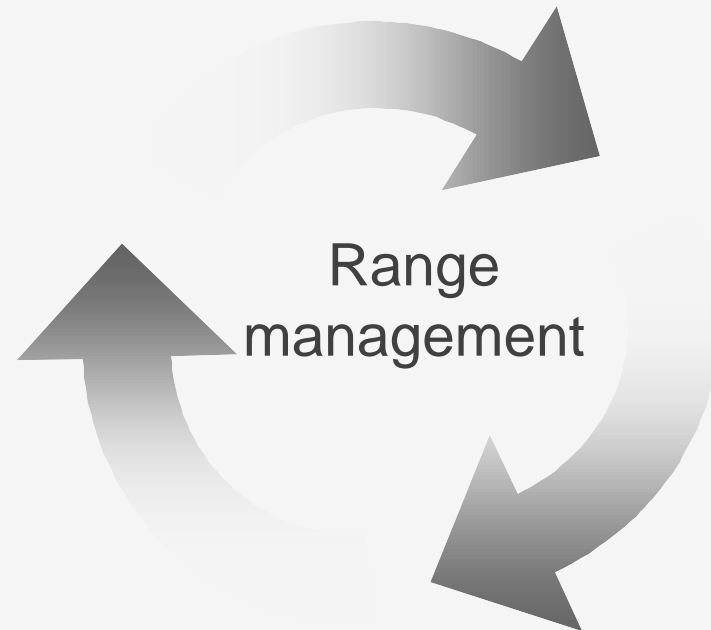


Is the broadest range a winning concept?

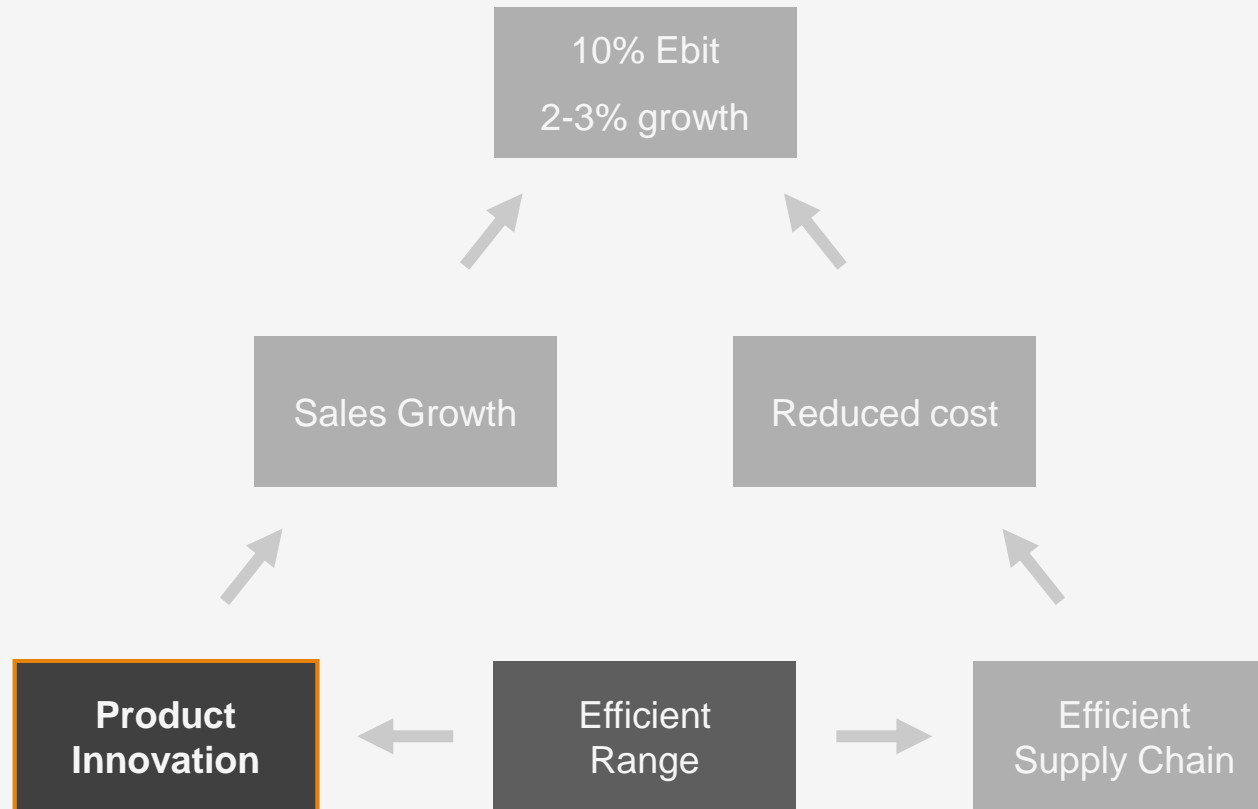


Today we have more than a thousand different:

- Door designs
- Sinks
- Knobs & handles



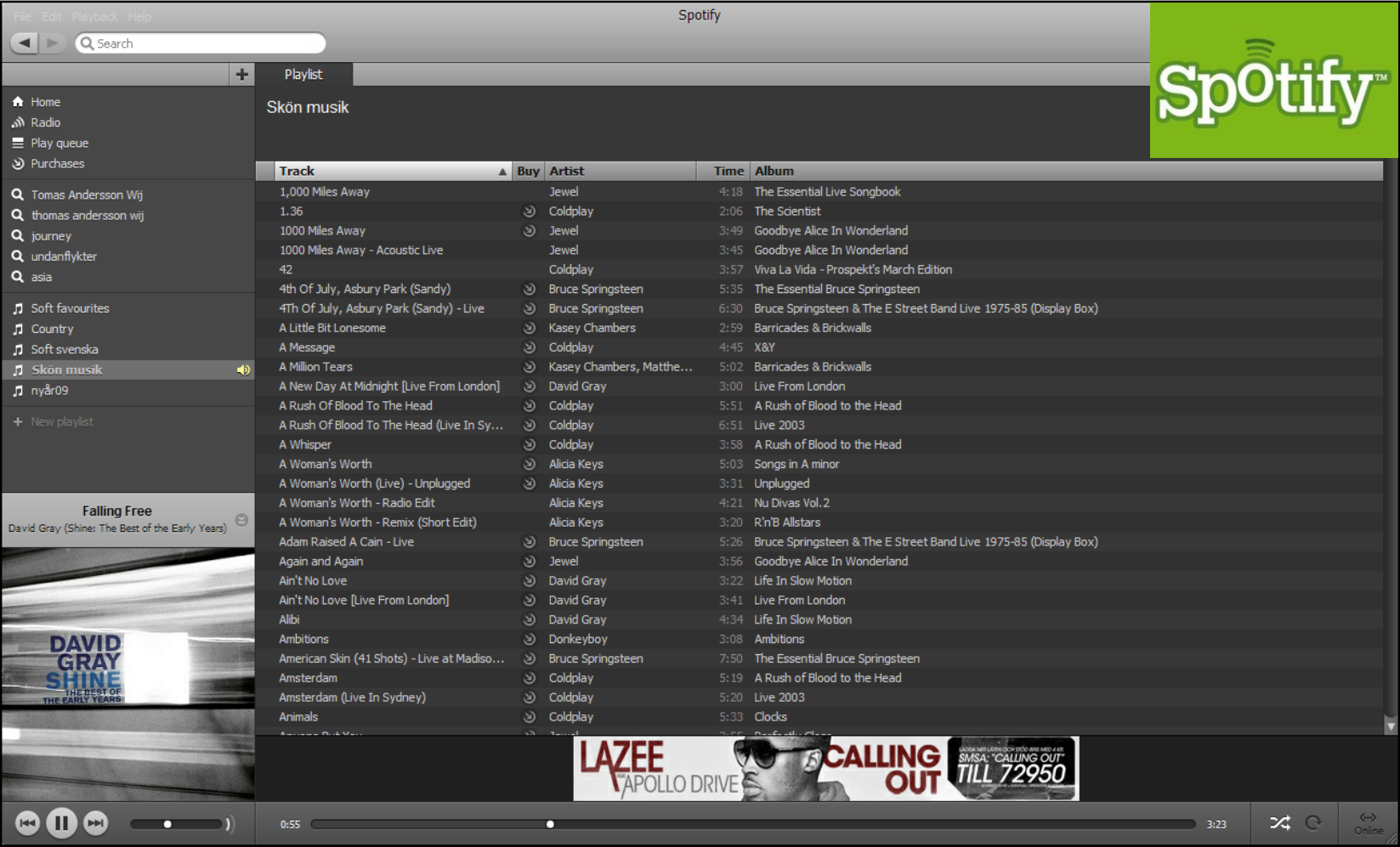
Creating conditions for growth and profit



Innovation by understanding the consumer

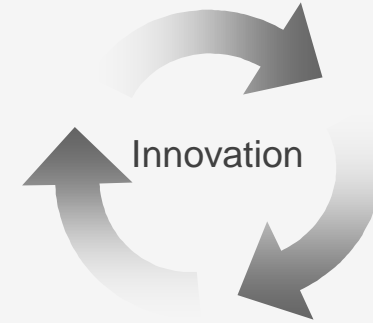
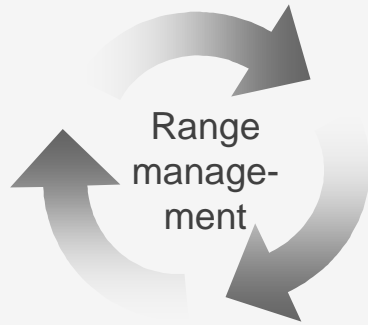


Innovation by understanding the consumer



What is the performance of your kitchen?





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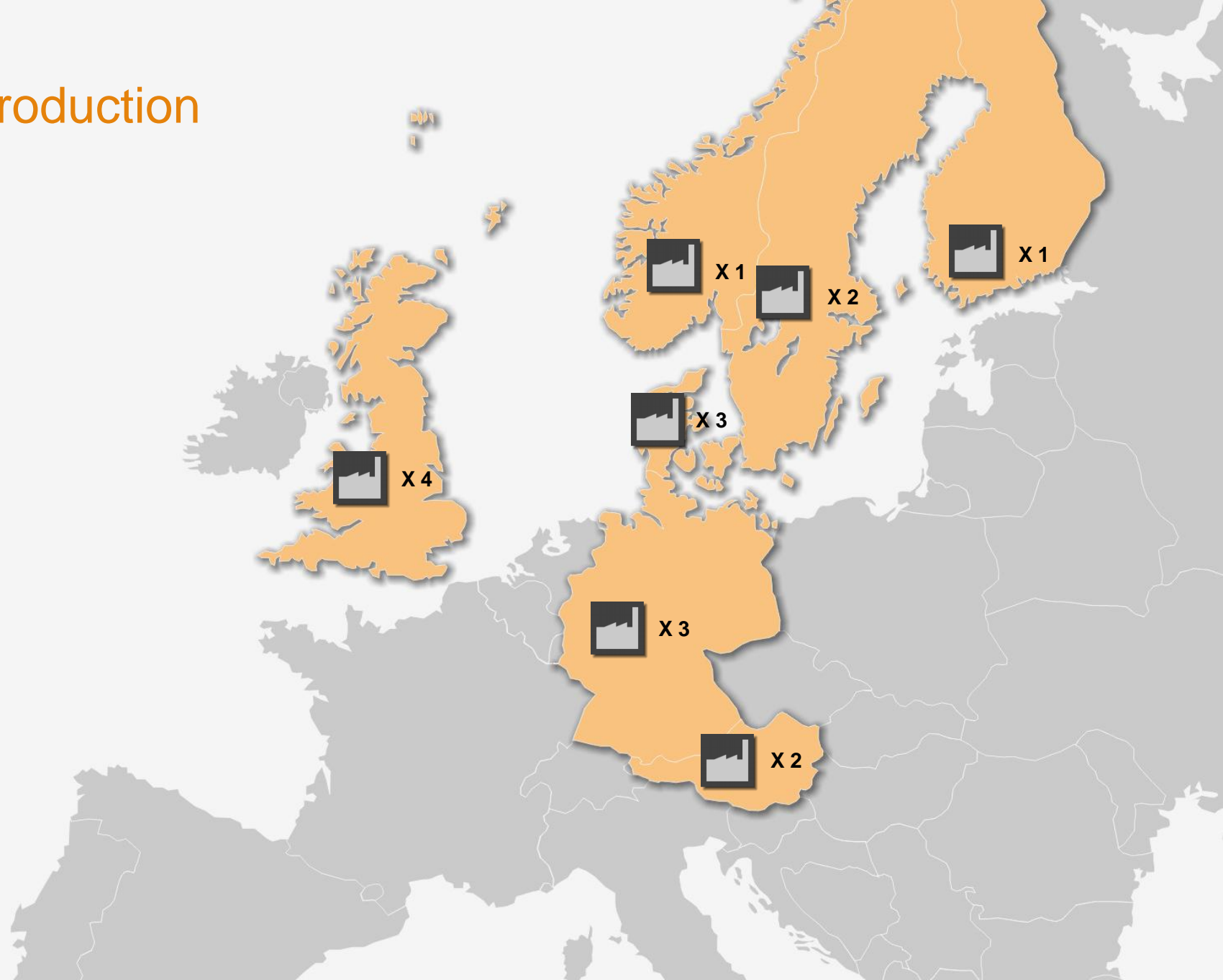


Production

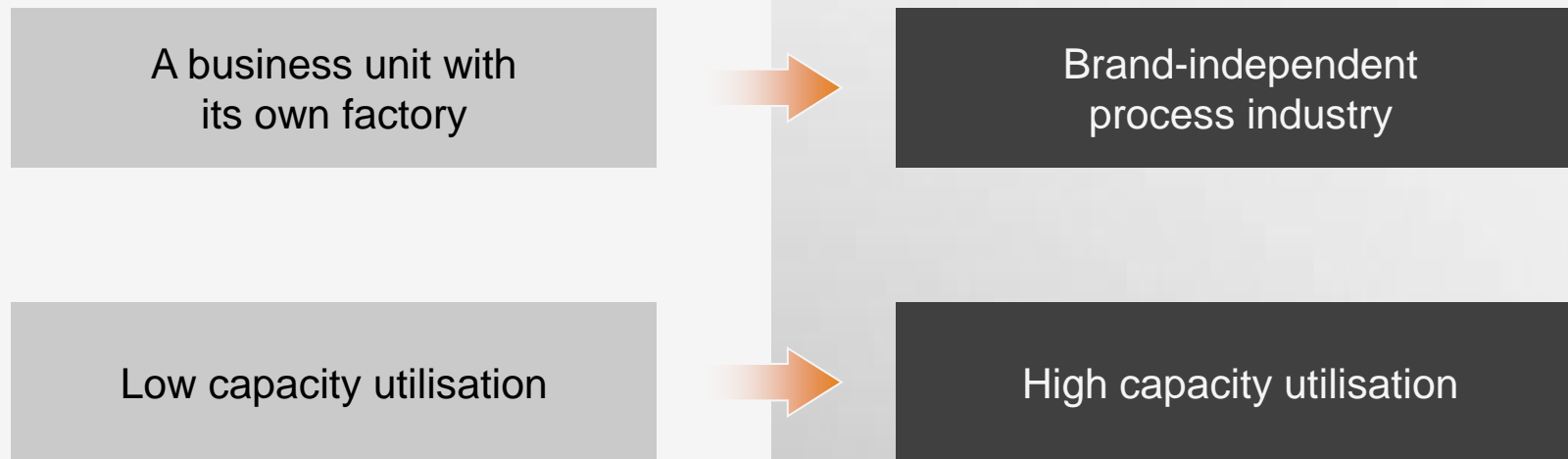
Ingemar Tärnskär



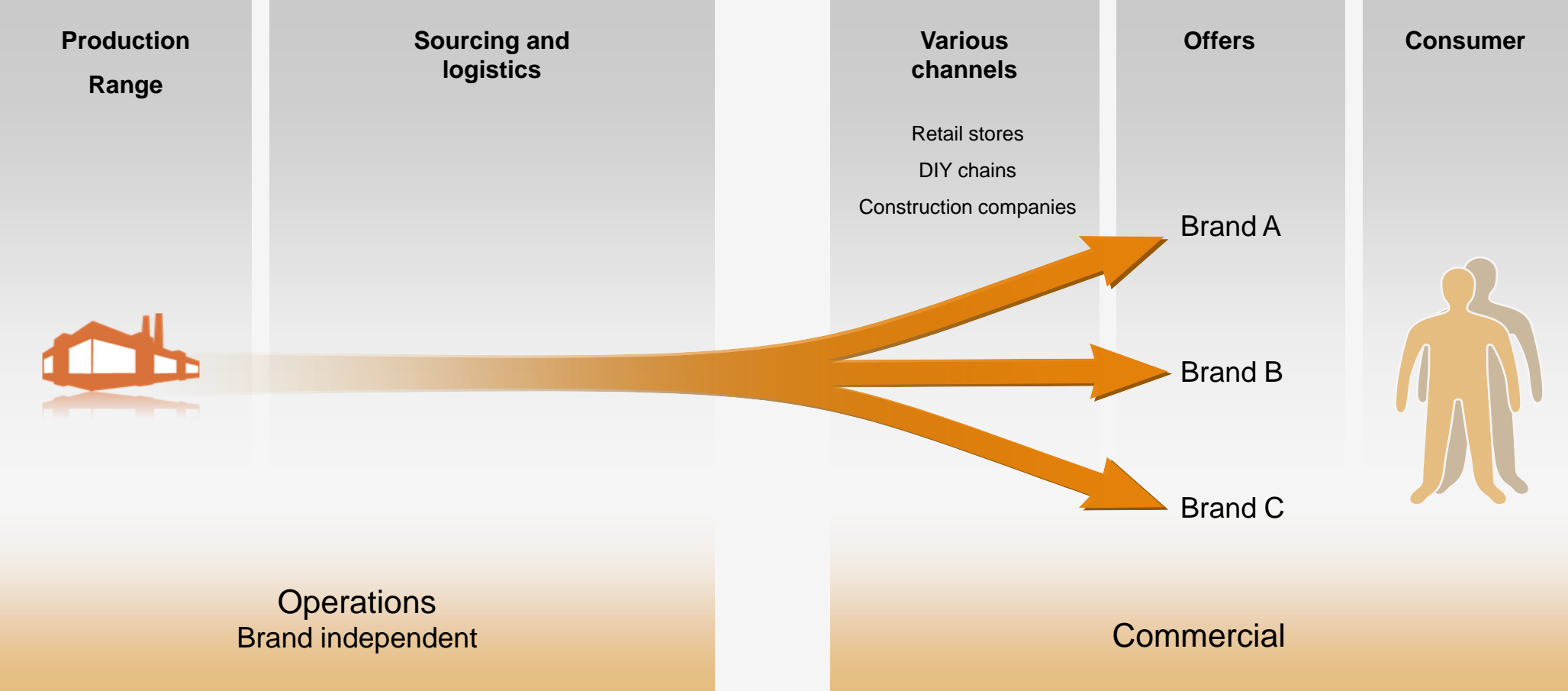
From 20 to 16 production plants in 2009



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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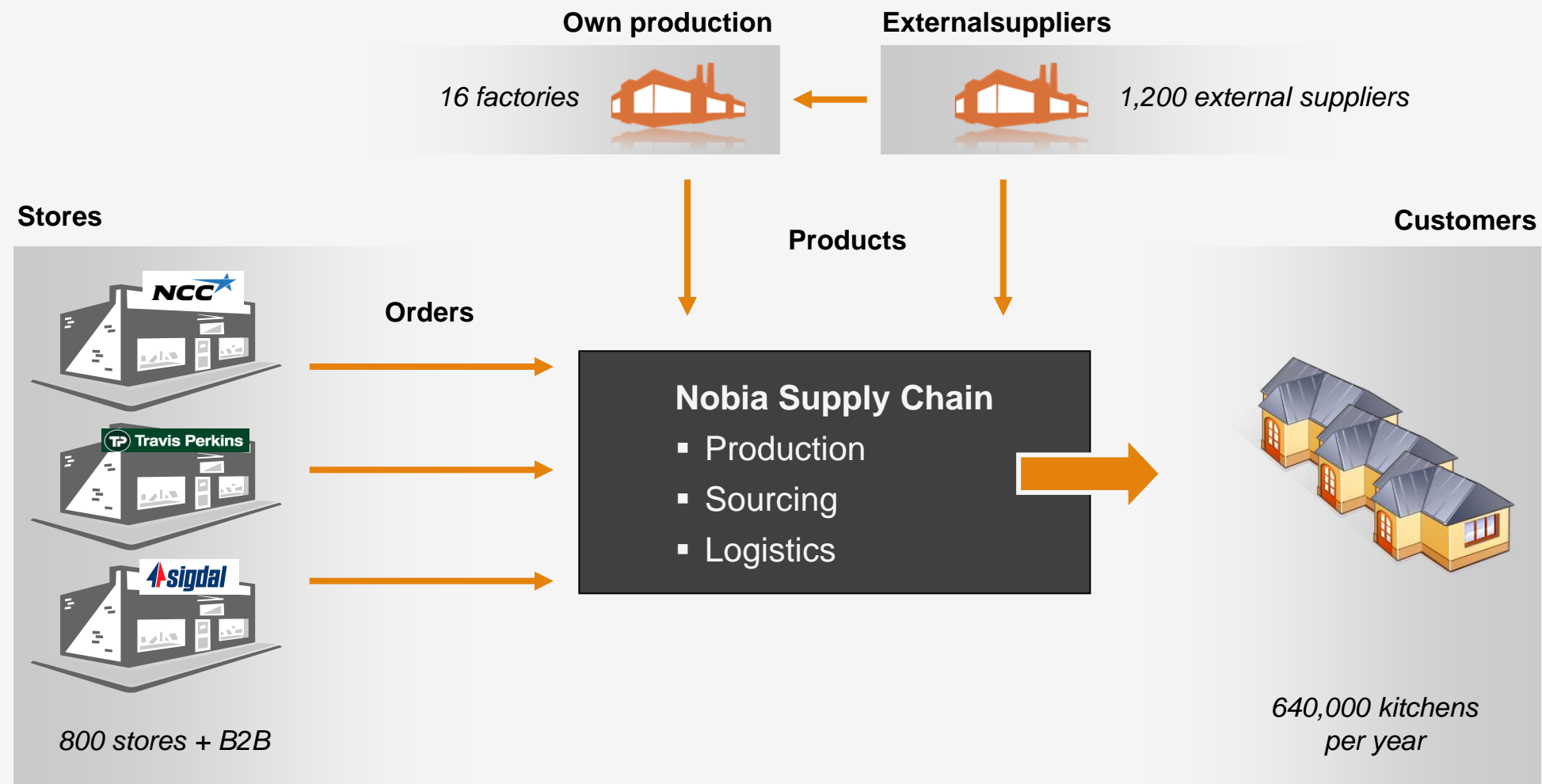


Sourcing and logistics

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

