Annual Figures 2014

Amsterdam, 22 January 2015

Sligro Food Group N.V.

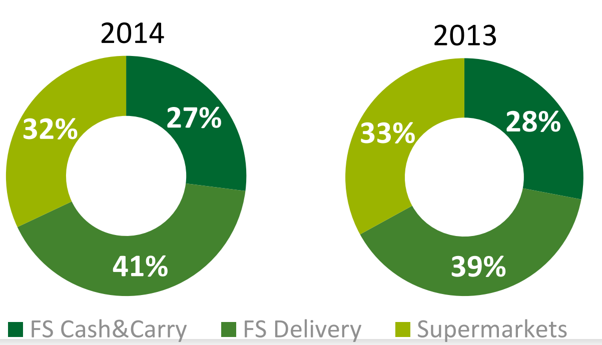
Agenda

Welcome	Koen Slippens
Annual Figures 2014	Huub van Rozendaal
Foodservice	Koen Slippens
Food retail	Koen Slippens
Outlook for 2015	Koen Slippens

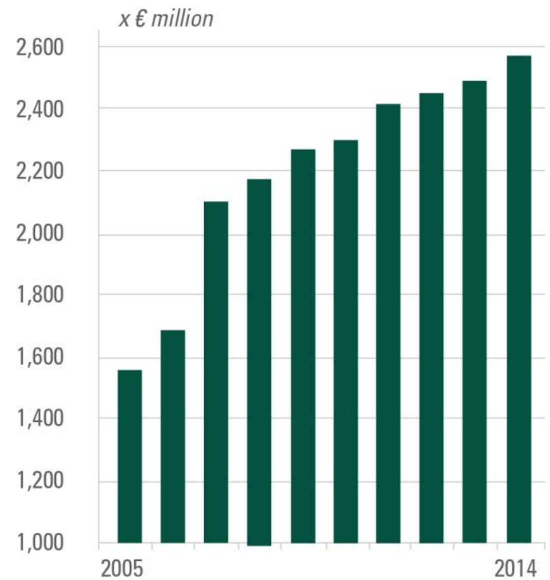
Sligro Food Group N.V.

Revenue

*amounts * € million*	2014	2013	2014	2013
Revenue	**2,572**	**2,498**	**100.0%**	**100.0%**
Gross margin	596	578	23.2%	23.1%
Other operating income	5	5	0.2%	0.2%
Expenses	-452	-440	-17.6%	-17.6%
EBITDA	**149**	**143**	**5.8%**	**5.7%**
Impairment	-3	-2	-0.1%	-0.1%
Depreciation	-40	-41	-1.6%	-1.6%
EBITA	**106**	**100**	4.1%	4,0%
Amortisation	-17	-12	-0.6%	-0.5%
EBIT	**89**	**88**	**3.5%**	**3.5%**
Interest	-3	-1	-0.1%	0,0%
Profit before tax	**86**	**87**	**3.4%**	**3.5%**
Taxes	-17	-19	-0.7%	-0.8%
Profit for the year	**69**	**68**	**2.7%**	**2.7%**



- Revenue + 3.0%
- Organic excluding tobacco + 1.7%
- Organic + 2.2%



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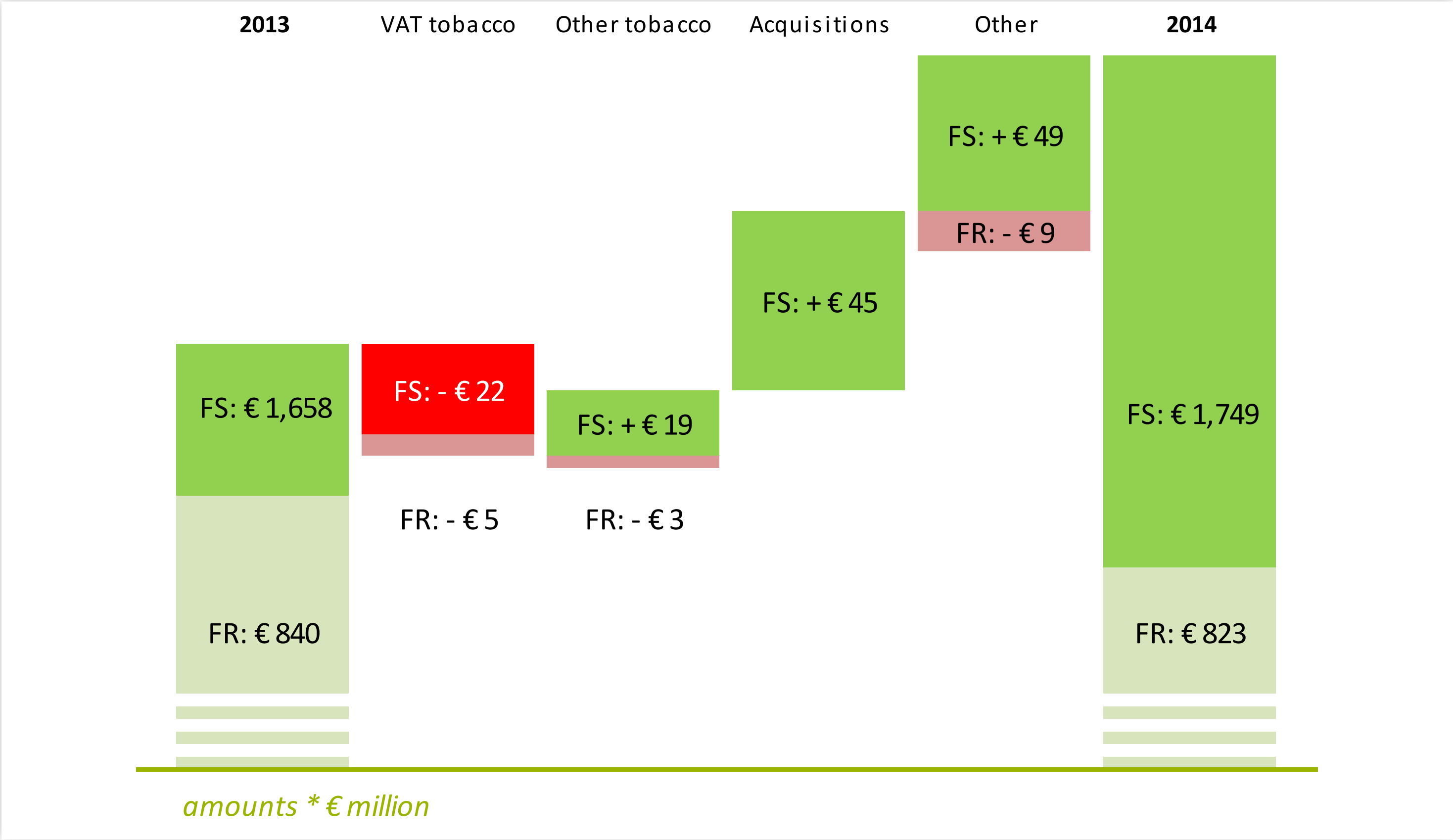
Revenue Sligro Food Group



	SFG	FS	FR
• Revenue	+ 3.0%	+ 5.5%	- 2.0%
• Organic excl tobacco	+ 1.7%	+ 3.5%	- 1.5%
• Organic	+ 2.5%	+ 4.1%	- 1.5%

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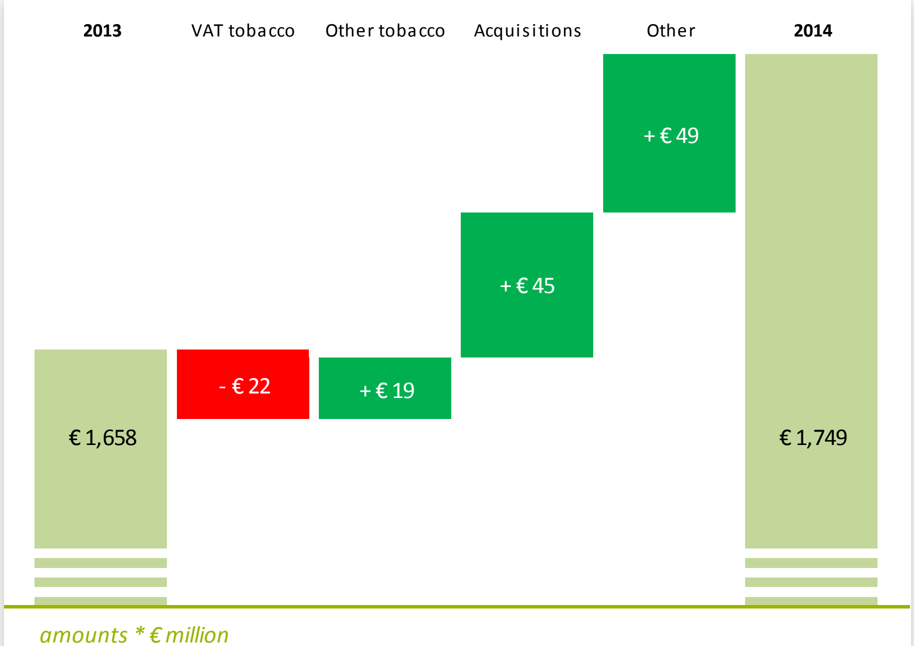
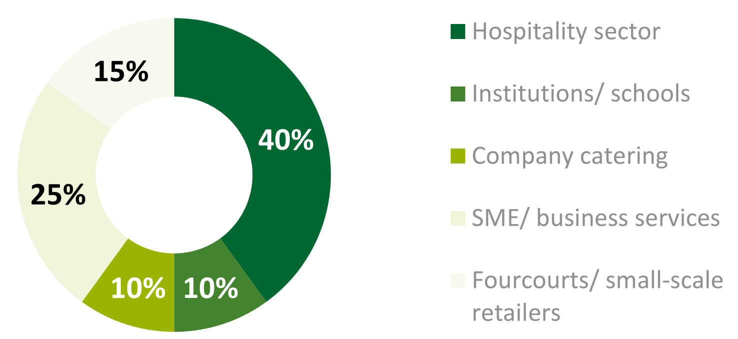
Revenue Foodservice





- Revenue + 5.5%
- Organic excluding tobacco + 3.5%
- Organic + 4.1%

- Delivery organic growth almost 7%
- Cash & Carry still just below last year

- Outperformance approximately 4.5%

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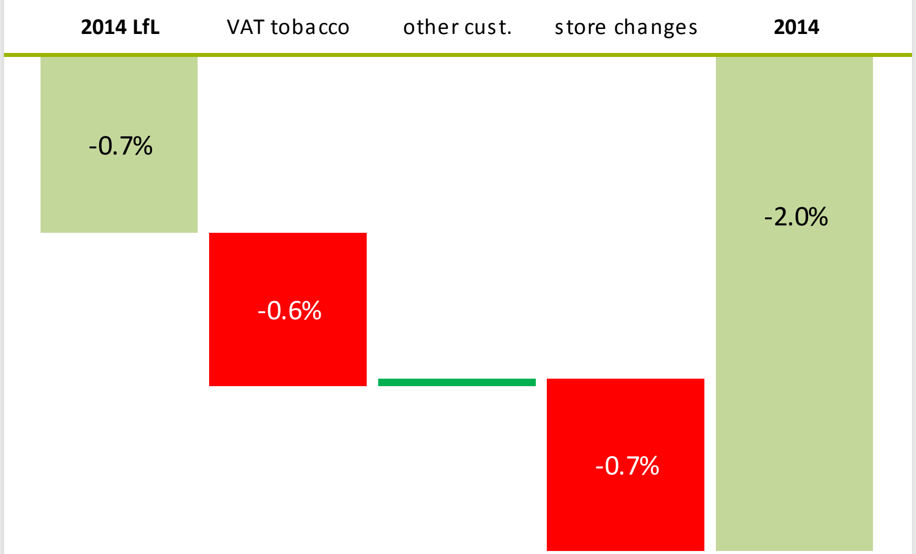
Revenue Foodretail



	Nielsen	IRI	Average	EMTÉ	GfK
Q1	-0.7%	-1.5%	-1.1%	-2.7%	-1.8%
Q2	1.4%	1.5%	1.5%	1.2%	1.2%
Q3	0.9%	0,0%	0.5%	-2.6%	-0.4%
Q4	1.6%	1.4%	1.5%	1.4%	0.4%
Year	**0.8%**	**0.4%**	**0.6%**	**-0.7%**	**-0.1%**

- Revenue - 2.0%
- EMTÉ like-for-like sales - 0.7%
- Market researcher average + 0.6%

- EMTÉ growth trailing the market
- Volatile sales from one quarter to another

- Market researcher figures again differ sharply
  - IRI revised its 2014 figures upwards retroactively in December

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Gross margin

*amounts * € million*	2014	2013	2014	2013
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Profit for the year	**69**	**68**	**2.7%**	**2.7%**

- Percentage-wise up by 0.2% points owing to change in VAT levy on tobacco, making underlying decline of 0.1 % point
- Decline mainly due to increase in tobacco sales through foodservice and altered sales mix

Expenses

*amounts * € million*	2014	2013	2014	2013
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- Percentage-wise 0.2% points higher, total owing to tobacco effects, making underlying improvement of 0.1% points. (on total of expenses, depreciation and amortisation)

- Cost-cutting measures
- Pension (accounting) costs down by €2 million
- Acquisition integration costs of the same order as in previous year
- Write-downs on property €1 million more
- 'Incidentals' overall (see next slide) result in €1 million cost reduction

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Incidentals

*amounts * € million*	Foodservice 2014	Foodservice 2013	Foodretail 2014	Foodretail 2013	Total 2014	Total 2013
Other operating income:						
Book profits/ (losses)	4	-	-2	3	2	3
Expenses:						
Pension gains	4	2	-	-	4	2
Impairments	-2	-	-1	-2	-3	-2
Integration costs	PM	PM	-	-	PM	PM
Impact on EBITA	**6**	**2**	**-3**	**1**	**3**	**3**
Tax effect					-1	-1
					2	**2**
Spar / SuperDirect					-2	-
Impact on net profit					**-**	**2**

- Neutral overall for the group at EBITA level but shift of €4 million between business lines: FS €4 million gain; FR €4 million loss

EBITA

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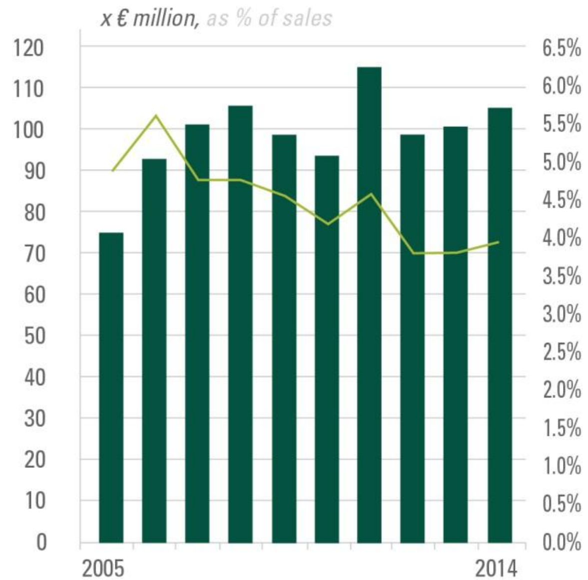
- Foodservice EBITA up by €8 million on back of increased sales + incidental items (€4 million)
- Food retail EBITA down by €2 million but underlying improvement of €2 million excluding incidentals



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Amortisation, interest and tax

	2014	2013
Amortisation		
Software	-4	-3
Other	-13	-9
	-17	**-12**

	2014	2013
Interest		
Profits of associates	1	3
Net financing expense	-4	-4
	-3	**-1**

	2014	2013
Taxes		
Corporate income tax	-17	-19

- Software amortisation charges opposed to future capital expenditure (inc. replacement investments)
- Other amortisation charges higher owing to acquisitions and new customer contracts
- Share in results of associates lower owing to SuperDirect write-off and one-off reorganisation costs in Spar results
- Tax burden down overall:
  - Investment incentives (-)
  - ‘Innovation box’ (-)
  - Lower profits from associates (+)

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Profit for the year

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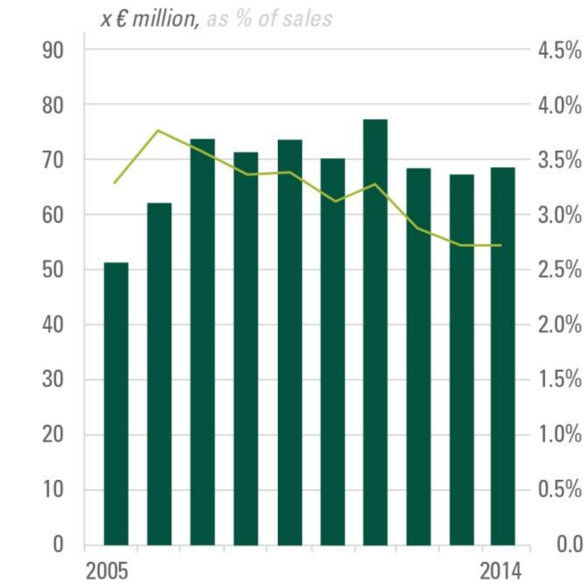
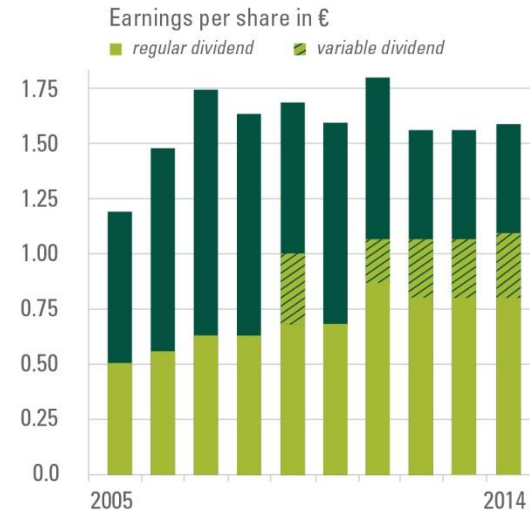
	2014	2013	increase
Profit for the year (€ million)	69	68	1.5%
Earnings per share (€)	1.58	1.55	1.9%
Proposed dividend (€)	1.10	1.05	4.8%
of which regular (€)	*0.80*	*0.80*	
of which variable (€)	*0.30*	*0.25*	





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Segment information

*amounts * € million*	Foodservice 2014	Foodservice 2013	Foodretail 2014	Foodretail 2013
Revenue	1,749	1,658	823	840
Other operating income	4	1	1	4
EBITDA	121	114	28	29
EBITA	93	85	13	15
EBIT	83	81	6	7
EBITDA % of revenue	6.9%	6.9%	3.4%	3.5%
EBITA % of revenue	5.3%	5.1%	1.6%	1.8%
EBIT % of revenue	4.7%	4.9%	0.7%	0.8%
Net capital expenditure	53	34	7	2
Depreciation and amortisation software	-33	-31	-14	-15
Net capital employed (year-end)	458	426	145	172
EBITDA % of average CE	27.5%	26.8%	17.4%	15.6%
EBITA % of average CE	21.0%	20.2%	8.6%	8.3%
EBIT % of average CE	18.8%	19.1%	3.8%	4.1%

- Foodservice
  - Increased sales due to like-for-like outperformance of 4.5% + acquisitions
  - EBITA up by €4 million due to incidental gains and losses
  - Capex higher because of Berkel en Rodenrijs Distribution Centre property purchase and Sligro 3.0 revamp
  - Saving on working capital due to supply chain finance and effect of closing date for year, partly offset by increase in inventories
- Food retail
  - EBITA down by €4 million due to incidental gains and losses but underlying improvement in EBITA of €2 million
  - Like-for-like sales 1.3% down compared with market
  - Invested capital sharply lower due to relatively low level of investment (2013: proceeds from disposals)
  - Saving on working capital due to supply chain finance and closing date effect

Cash flow statement

*amounts * € million*	2014	2013
From operations	170	154
Interest etc.	-	1
Corporate income tax	-23	-22
From operating activities	**147**	**133**
Acquisitions/ divestments	-17	-19
Investments in associates	-5	-
Net capital expenditure	-69	-32
From investing activities	**-91**	**-51**
Changes in debt	-53	-
Dividend paid/ repurchase own shares	-64	-49
From financing activities	**-117**	**-49**
Movement in cash and short-term bank borrowings	-61	33
Balance at start of year	135	102
Balance at year-end	**74**	**135**
Free cash flow	**78**	**101**

*amounts * € million*	2014	2013
Changes in working capital		
Inventories	20	-20
Trade receivables and other current assets	7	31
Current liabilities	-57	-26
Total working capital	**-30**	**-15**

- €14 million improvement in cash flow from operating activities
- Free cash flow €78 million (2013: €101 million)
- Another considerable reduction in working capital, partly optical owing to calendar effect (see next slide)
- Cash flow from investing activities higher, partly owing to a number of exceptional items:
  - €19 million (including €14 million in property) invested in Berkel en Rodenrijs Distribution Centre
  - €6 million to buy two premises previously leased
  - €11 million invested in long-term customer accounts
- Rooswinkel and HTS acquisitions (€17 million)
- Dividend payment for 2013 (€46 million) and interim dividend for 2014 (€18 million)
- Second tranche of first USPP repaid in December

Exceptional movements in working capital

*amounts * € million*	in 2014 Christmas	in 2015 reverse of Christmas	week 53	increase in 2015
Exeptional movements in working capital				
Inventories	10	-10	-	-10
Trade receivables and other current assets	10	-10	-	-10
Current liabilities	-40	40	20 [1)]	60
Subtotal extraordinary changes in working capital	**-20**	**20**	**20**	**40**

[1)] mainly 1 additional payment of payroll taxes & excise duties and lower trade payables

Expected 'genuine' saving on working capital 2015 (apart from exceptional movements):	**-15 tot -20**
Target for 2018: working capital is 12 days' sales	
On present level of sales, extra savings on working capital in years ahead (2016-2018):	-35 to -30

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Cash flow by segment

*amounts * € million*	Foodservice 2014	Foodservice 2013	Foodretail 2014	Foodretail 2013
EBIT	83	81	6	7
Depreciation and amortisation software	33	31	14	15
Amortisation other intangibles	6	2	7	7
Other operating income in CAPEX	-	-	-4	-1
Changes in working capital and pensions	6	14	19	-1
Interest and associates	-2	-1	2	1
Corporate income tax	-22	-21	-1	-1
From operating activities	**104**	**106**	**43**	**27**
Net capital expenditure	-60	-30	-9	-2
Free cash flow	**44**	**76**	**34**	**25**
Acquisitions/divestments	-17	-18	-	-1

- Foodservice
  - Acquisition of Van Oers (2013) and Rooswinkel (2014) led to increase in working capital
  - Increased inventory level entirely within foodservice
  - Significantly higher investment cash flow, mainly due to purchase/construction of Berkel en Rodenrijs Distribution Centre + 2 cash-&-carry outlets + new customer accounts.
  - Increase in suppliers' credit due to improved Superunie terms of business and on FS purchasing.
- Food retail
  - Net cash flow from investing activities limited (2013 down by more than €6 million due to proceeds from disposals)
  - Drop in working capital mainly accounted for by trade payables

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Foodservice

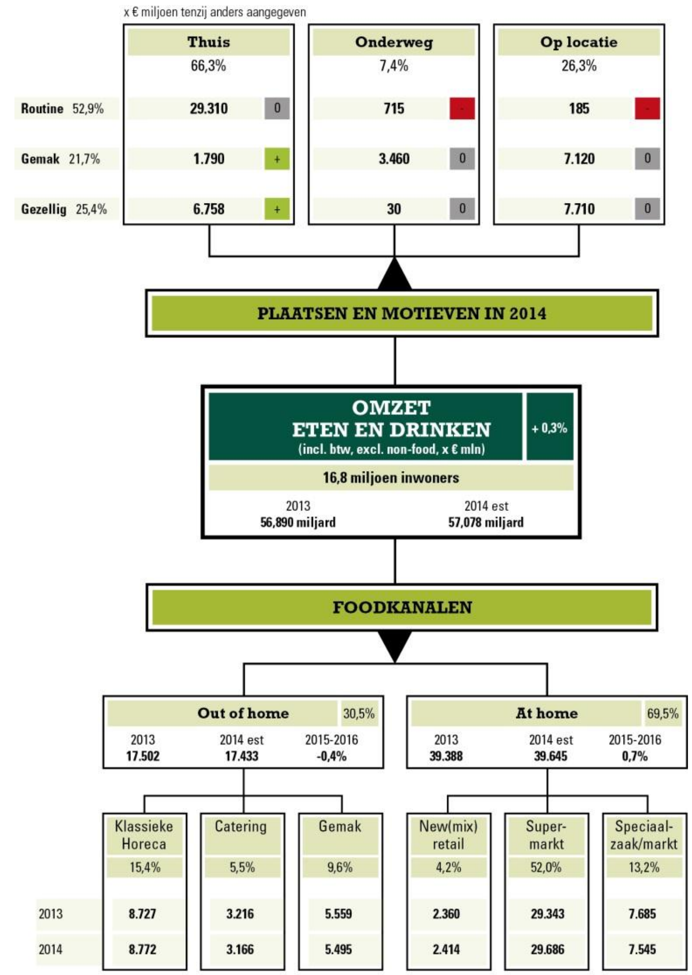
The foodservice market

Sligro Food Group foodservice business

Plans for 2015 (and beyond)

The Foodservice market 2014

- Foodservice market, consumer sales -0.4%
- Foodservice market, wholesale value -1.2%
  - Drop in wholesale sales value partly due to VAT changes on tobacco (taking €125 million in sales out of the market)
  - Eliminating this effect, there is an underlying increase of 0.8%
- Bankruptcy Kruidenier per March 2014
- Acquisitions of Horeca Totaal Sluis and Rooswinkel by Sligro Food Group
- Various new players



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Marketshares Foodservice 2014

Foodservice market players	Market share 2014	2013	2012
Sligro Food Group	22.9	21.2	19.9
Various breweries	13.8	14.0	13.9
Lekkerland	12.7	12.4	13.5
Deli-XL	11.0	11.1	10.8
Hanos/ISPC	7.1	7.0	6.4
Makro (Metro)	6.7	6.8	9.6
Kruidenier	--	3.3	3.5
De Kweker/Vroegop	2.0	2.2	2.1
Other	23.8	22.0	20.3
	100	100	100

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Sligro Food Group foodservice business

- Outperforming the market by around 4.5%

- Market share up 1.7% points, at 22.9%
  - 1.0% points organic growth
  - 0.7% points due to acquisitions

- Acquisitions of Van Oers (2013), Rooswinkel (2014) and HTS (2014) added sales of €45 million in 2014

- Delivery service sales received extra boost from takeover of Kruidenier customers

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Sligro Food Group foodservice business

- Sligro 3.0 is making considerable contribution towards reversing trend in Cash & Carry business (effect of both revamp and promotions)
- Three Cash & Carry outlets converted to Sligro 3.0 format (Maastricht, Gouda and Eindhoven)
- Big effort on inspiration front, both in-store and online
- More targeted segmentation, with sales approach and promotion aimed at each specific segment
- Considerable progress made with new visual identity and CRM
- Preparations for Sligro Online 3.0 well advanced, roll-out at end of 2015

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Sligro Food Group foodservice business

- Integration of Rooswinkel and Horeca Totaal Sluis successfully completed
- Rooswinkel bringing in less in the way of sales, but purchase price consequently substantially lower
- Strong new business generated by ex-Kruidenier customers → 600 sites served within 24h
- New Berkel en Rodenrijs Distribution Centre on stream (September -- replacing The Hague and Barendrecht Distribution Centres combined)
- *Kicken op Kosten* cost-cutting programme delayed due to integration activities and commissioning of new infrastructure
- Timely efforts by Van Hoeckel to reposition business, resulting in out-performance of sharply shrinking market
- Examination of our position in Belgium (threats and opportunities) as basis for long-term business case

Plans for 2015 (and beyond)

- Further roll-out of Sligro 3.0 format across Cash & Carry outlets
  - The Hague Forepark
  - Veghel
  - Enschede

- Opening of two new outlets in Sligro 3.0 format
  - Almere (Q3-2015)
  - Utrecht (Q1-2016)

- Roll-out of Sligro Online 3.0, integrating Slimis

- Continuation of *Kicken op Kosten* programme

- Sligro Delivery Service efforts aimed at combination of further improvement in customer focus + profitability improvement

- Further refinement of long-term business case for Belgium

C&C Almere

C&C Utrecht

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Foodretail

The Foodretail market

Sligro Food Group Foodretail business

Plans for 2015 (and beyond)

Foodretail market 2014

- Market growth + 0.6%
- Shrinking volumes for the first time since 2005
- Supermarket product range increasingly available through other channels
- Market flatlined over first three quarters but picking up in Q4 (IRI revises figures upward with retroactive effect)
- Extra squeeze on fruit and vegetable prices after boycott of Russia – lower fruit & veg sales wipe 0.2% off market growth
- Inflow from out-of-home food halted
- Competition still mainly on price

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Marketshares Foodretail 2014

Players Supermarkets	Market share 2014	2013	2012
Albert Heijn	34.1	34.0	33.7
Jumbo	14.0	11.2	9.6
C1000	5.8	9.5	12.0
Plus	5.9	5.8	5.8
Aldi/Lidl	16.4	15.9	15.1
Sligro Food Group	2.7	2.7	2.7
Other	21.1	20.9	21.1
	100	100	100

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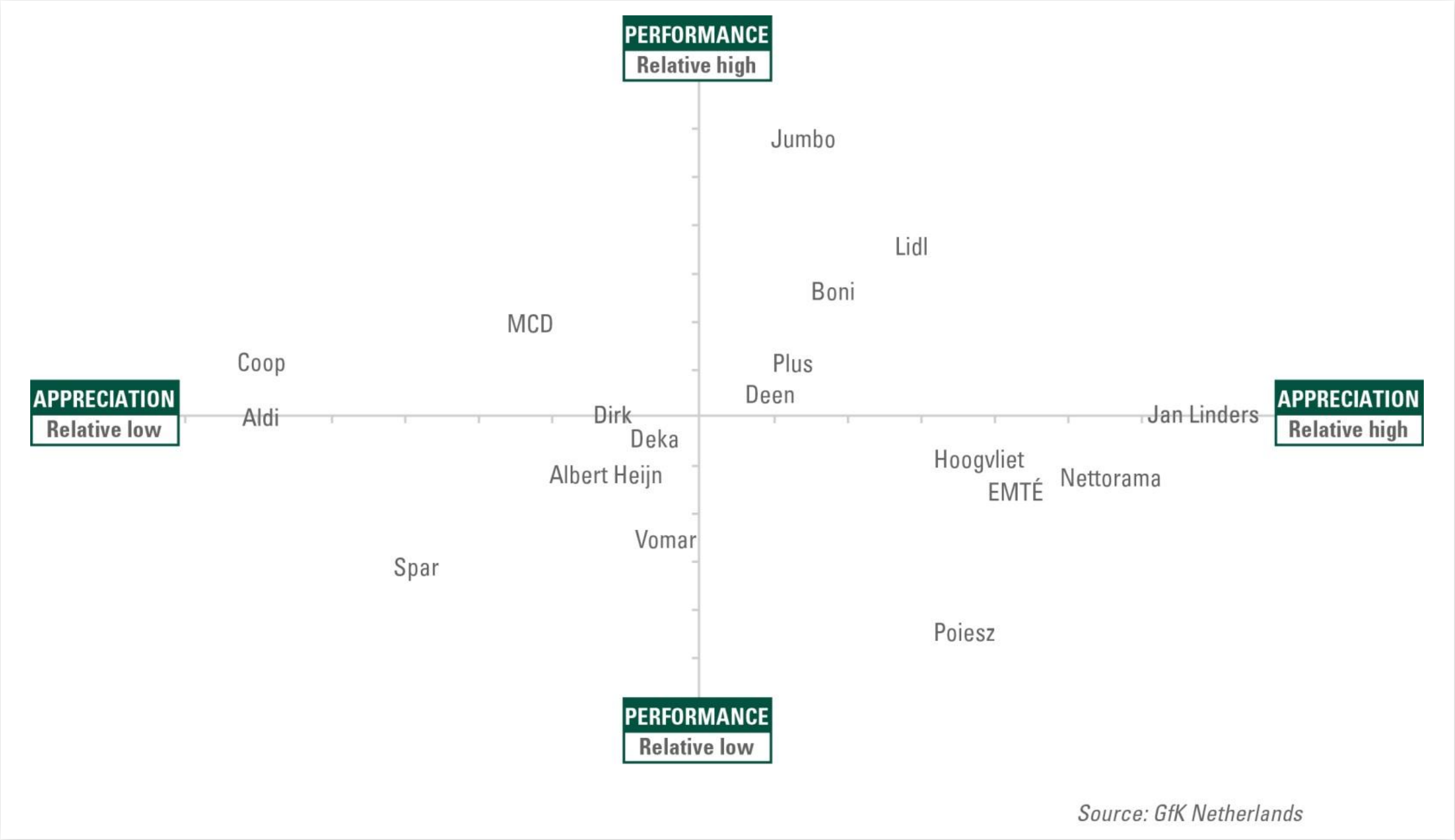
Christmas report GfK 2014



Sligro Food Group Foodretail business

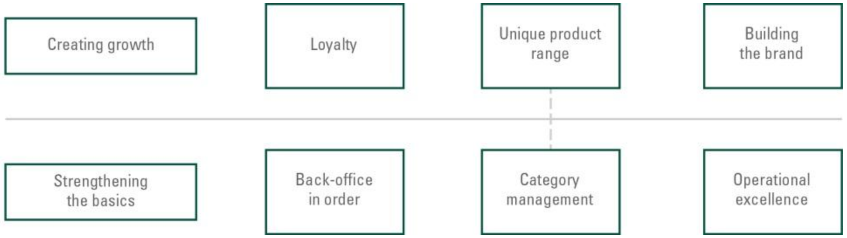
- Like-for-like sales at -0.7% behind market
- Best Meat Department award for fifth year
- Also Best Cheese Department and No. 2 for Best Bakery in 2014
- 10th position overall in revised GfK rankings
  - customer appreciation rating high as ever (No. 3),
  - but only 14th in performance index.
- Further work on long-term plan
- Launch of new website has led to much greater use
- Launch of new *Fijnproevers* ('Gourmet') loyalty programme
  - More than 500,000 customers saving points with card
  - Card used in connection with 60% of sales
  - 70,000 users of *Fijnproevers* mobile app

Sligro Food Group Foodretail business

- New category management plan prepared and translated into modular product range structure
- Now 200 SKUs under OK€ label
- Great deal of preparatory work on range innovation, which will become increasingly evident in 2015
- Intensive programme (in line with Sligro 3.0) launched to overhaul EMTÉ brand strategy
- Modular approach has resulted in further drop in food wastage
- Far-reaching and significant roll-out of modular organisational set-up, aimed at tackling wage costs, completed in Q4

Plans for 2015 (and beyond)

- Full steam ahead on implementation of Long-Term Plan
- Further refinement of EMTÉ's new marketing strategy and opening of pilot store with 'Tastiest supermarket in the Netherlands' branding
- Expand *Fijnproevers* loyalty programme with additional modules
- Targeted application of customer information collected through *Fijnproevers* card use
- Opening of 3 new EMTÉ franchise stores (including Montfort and Zoutelande)
- A lot of thought given to communication in connection with '50 years of EMTÉ'



fijnproevers

Sligro
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Outlook for 2015

- Economic recovery will continue, but at a gradual pace
- The total foodservice market will probably show some slight growth for the first time since 2008
- Modest growth expected in food retail market
- Sales growth will outperform the market
- 53 weeks in 2015 – week 53 will add around €50 million in sales (with above-average profitability)
- Acquisitions made in 2014 will add around another €10 million in extra sales in 2015
- No definite profit forecasts

’N TANDJE ERBIJ

‘Upping the Game’

Sligro

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Appendices

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Profit and loss account

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Gross margin	596	578	3.1%	23.2%	23.1%
Other operating income	5	5	0.0%	0.2%	0.2%
Expenses	-452	-440	2.7%	-17.6%	-17.6%
EBITDA	**149**	**143**	**4.2%**	**5.8%**	**5.7%**
Impairment	-3	-2	50.0%	-0.1%	-0.1%
Depreciation	-40	-41	-2.4%	-1.6%	-1.6%
EBITA	**106**	**100**	6.0%	4.1%	4,0%
Amortisation	-17	-12	41.7%	-0.6%	-0.5%
EBIT	**89**	**88**	**1.1%**	**3.5%**	**3.5%**
Interest	-3	-1	200.0%	-0.1%	0,0%
Profit before tax	**86**	**87**	**-1.1%**	**3.4%**	**3.5%**
Taxes	-17	-19	-10.5%	-0.7%	-0.8%
Profit for the year	**69**	**68**	**1.5%**	**2.7%**	**2.7%**

Sligro Food Group N.V.

Balance sheet

*amounts * € million*	27-12-2014	28-12-2013		27-12-2014	28-12-2013
Non-current assets			Equity	**570**	**571**
Intangible	198	179			
Tangible	295	286	Provisions	**31**	**32**
Investment property	15	13			
Financial	54	48	Non-current liabilities	**124**	**119**
	562	**526**			
Current assets			**Current liabilities**		
Inventories	213	192	Current portion long-term debt	-	53
Debtors	155	147	Creditors	200	148
Assets held for sale	8	6	Other	87	83
Cash	74	135			
	450	**480**		**287**	**284**
Total assets	**1,012**	**1,006**	**Total equity and liabilities**	**1,012**	**1,006**

Sligro Food Group N.V.

Cash flow statement

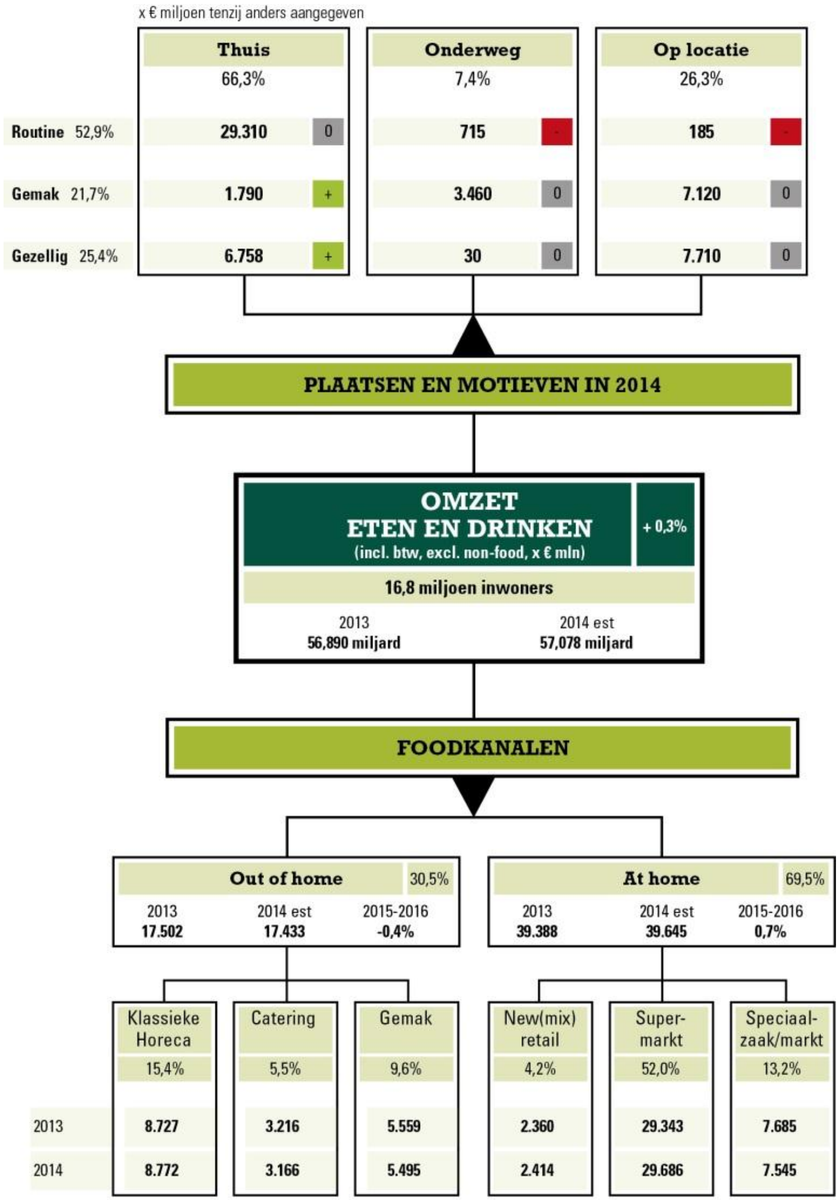
*amounts * € million*	2014	2013
From operations	170	154
Interest etc.	-	1
Corporate income tax	-23	-22
From operating activities	**147**	**133**
Acquisitions/ divestments	-17	-19
Investments in associates	-5	-
Net capital expenditure	-69	-32
From investing activities	**-91**	**-51**
Changes in debt	-53	-
Dividend paid/ repurchase own shares	-64	-49
From financing activities	**-117**	**-49**
Movement in cash and short-term bank borrowings	-61	33
Balance at start of year	135	102
Balance at year-end	**74**	**135**
Free cash flow	**78**	**101**

Segment information

*amounts * € million*	Foodservice 2014-II	Foodservice 2013-II	Foodservice 2014-I	Foodservice 2013-I	Foodretail 2014-II	Foodretail 2013-II	Foodretail 2014-I	Foodretail 2013-I	Total 2014-II	Total 2013-II	Total 2014-I	Total 2013-I
Revenue	905	855	844	803	407	414	416	426	1,312	1,269	1,260	1,229
Other operating income	-	-	4	1	1	3	-	1	1	3	4	2
EBITDA	68	69	53	45	16	13	12	16	84	82	65	61
EBITA	53	53	40	32	9	6	4	9	62	59	44	41
EBIT	48	51	35	30	6	2	-	5	54	53	35	35
EBITDA % of revenue	7.5%	8.1%	6.3%	5.6%	3.9%	3.1%	2.9%	3.8%	6.4%	6.5%	5.2%	5.0%
EBITA % of revenue	5.9%	6.2%	4.7%	4.0%	2.2%	1.4%	1.0%	2.1%	4.7%	4.6%	3.5%	3.3%
EBIT % of revenue	5.3%	6.0%	4.1%	3.7%	1.5%	0.5%	0.0%	1.2%	4.1%	4.2%	2.8%	2.8%
Net capital expenditure	17	19	36	15	2	1	5	1	19	20	41	16
Depreciation and amortisation software	-17	-15	-16	-16	-6	-8	-8	-7	-23	-23	-24	-23

Sligro Food Group N.V.

The Food market 2014



Sligro Food Group N.V.

Organisation Sligro Food Group

Central distribution centre and head office in Veghel		
Food retail	**Foodservice Cash & carry**	**Foodservice Delivery-service**
EMTÉ	**Sligro**	**Sligro/Van Hoeckel**
130 Own and franchise outlets	Large and small hospitality sector, leisure, caterers, forecourt outlets, large-scale users, institutional	
2 Distribution centres	National network of 47 cash & carry outlets	National netwrok of 9 delivery-service outlets
Sligro Fresh Partners & Production Specialised production facilities for convenience products (Culivers), fish (SmitVis) and meat (retail), patisserie/home caterer (Maison Niels de Veye) and four fresh-produce associates		

Sligro Food Group N.V.

Annual Figures 2014

Amsterdam, 22 January 2015

Sligro

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