

*Pure Freude
an Wasser*



THE FUTURE OF DISTRIBUTION IN THE SANITARY SECTOR

JONAS BRENNWALD

Co-CEO Grohe AG/ Leader Lixil EMENA

22 September 2022

PART OF **LIXIL**

MARKET CONDITIONS ARE CHANGING AND DEMAND MAY SLOW
INDUSTRY LEADERSHIP IS MORE IMPORTANT THAN EVER

The GROHE logo is centered within a dark blue square. It features the word "GROHE" in a bold, white, sans-serif font. Below the text are three horizontal, wavy white lines that resemble water ripples.

GROHE

*Pure Freude
an Wasser*



A LEADING BRAND DRIVES INDUSTRY LEADERSHIP AND MARKET DEMAND
OUR COMMITMENT TO PORTUGAL IS FULLY SEALED

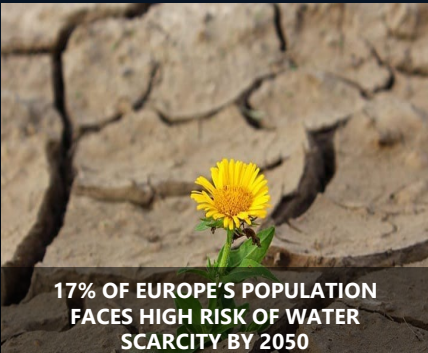


EXPERIENCE CENTER
LISBON

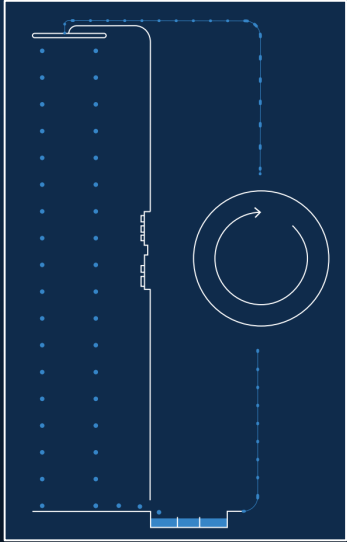
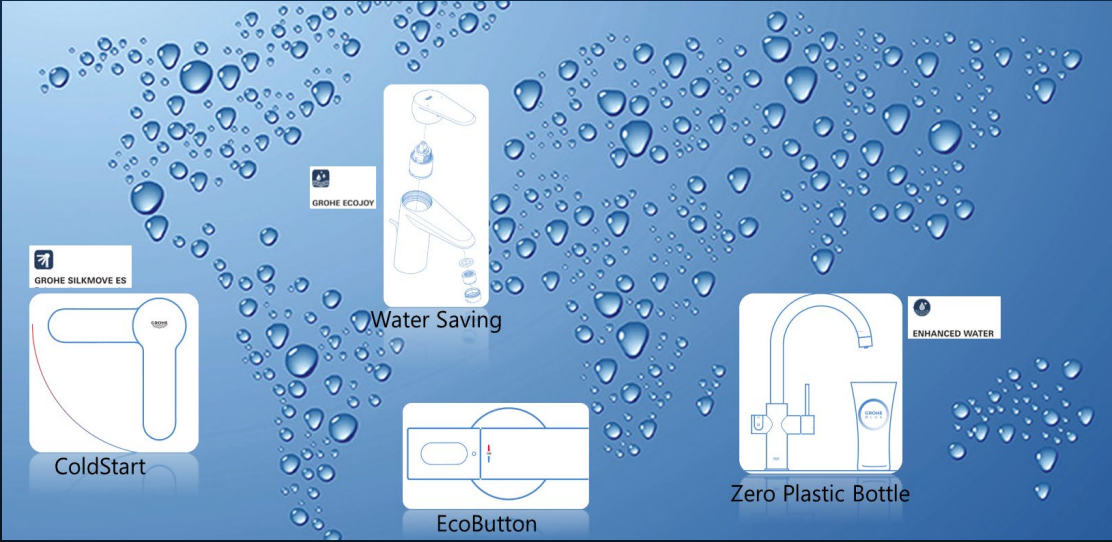
*Pure Freude
an Wasser*



A LEADING BRAND ACTIVELY DRIVES THE MARKET AND GENERATES NEW BUSINESS OPPORTUNITIES RATHER THAN JUST FOLLOW ESTABLISHED ROUTES



CONTRIBUTE TO MORE EFFICIENT ENERGY AND WATER RESOURCE USAGE...



...AND NOW MORE THAN EVER WE NEED TO INNOVATE AROUND THIS CAPABILITY TO DELIVER OUR LEADING BRAND PROMISE AND FURTHER DRIVE MARKET LEADERSHIP AND CONSUMER DEMAND

IN UNCERTAIN TIMES WE NEED TO WORK EVEN CLOSER TOGETHER
TO STRENGTHEN TRUST AND STRATEGIC ENGAGEMENT FURTHER

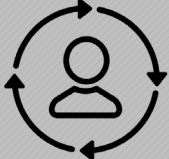




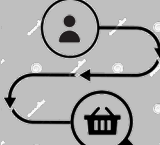

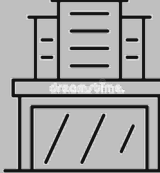
*Pure Freude
an Wasser*



- Honesty
- Transparency
- Humility



A LEADING BRAND HELPS DRIVE SOLUTIONS TO ADDRESS FUTURE INDUSTRY CHANGES IN THE SANITARY SECTOR

1		Services Value Creation for Customers (Installers, A&D)	5		Sustainability Hygiene Product Proposition Energy and Water Efficiency Cradle-to-Cradle
2		Digitalization E-Procurement Installer/ Customer Ordering Planning Platforms	6		"A" Brand Innovation Driver Consumer Pull Focused on fewer brands
3		Delivery Optimization On-Time-in-Full VMI/ EDI Drop Shipment	7		Consumer Journey Simplicity (Easy, Full Bathroom) Omni-Channel Touchpoints to Generate Market Pull
4		Consolidation Market Defragmentation Smaller Player Acquisitions	8		Showrooms Experience Focused Customized Luxury Localization



Pure Freude
an Wasser