

Financial Results 2015

Analysts' Conference

| 22nd March 2016 | Frankfurt | Stefan Fuchs / Dagmar Steinert



Key developments 2015

**Revenues +11%
to over €2 bn**

- Europe +10% to €1.23 bn
- Asia-Pacific, Africa +13% to €583 mn
- Americas +12% to €353 mn

EBIT

+9%

to €342 mn

+7%

higher dividend
payment proposed

2

acquisitions were completed:
Pentosin & Statoil Lubricants

Experienced and highly committed management team



Stefan Fuchs

- Chairman of the Executive Board, CEO
- With FUCHS since 1996
- Responsible for Region Americas, Corporate Development, HR, PR



Dr. Lutz Lindemann

- Member of the Executive Board
- With FUCHS since 1998
- Responsible for Technology, Supply Chain, Sustainability, Mining, OEM



Dr. Timo Reister

- Member of the Executive Board
- With FUCHS since 2009
- Responsible for Region Asia-Pacific, Africa



Dr. Ralph Rheinboldt

- Member of the Executive Board
- With FUCHS since 1998
- Responsible for Region Europe, Fuchs Lubritech Group, SAP/ERP-System



Dagmar Steinert

- Member of the Executive Board, CFO
- With FUCHS since 2013
- Responsible for Finance, Controlling, Investor Relations, Compliance, Internal Audit, IT, Legal, Taxes

As of 1st January 2016:

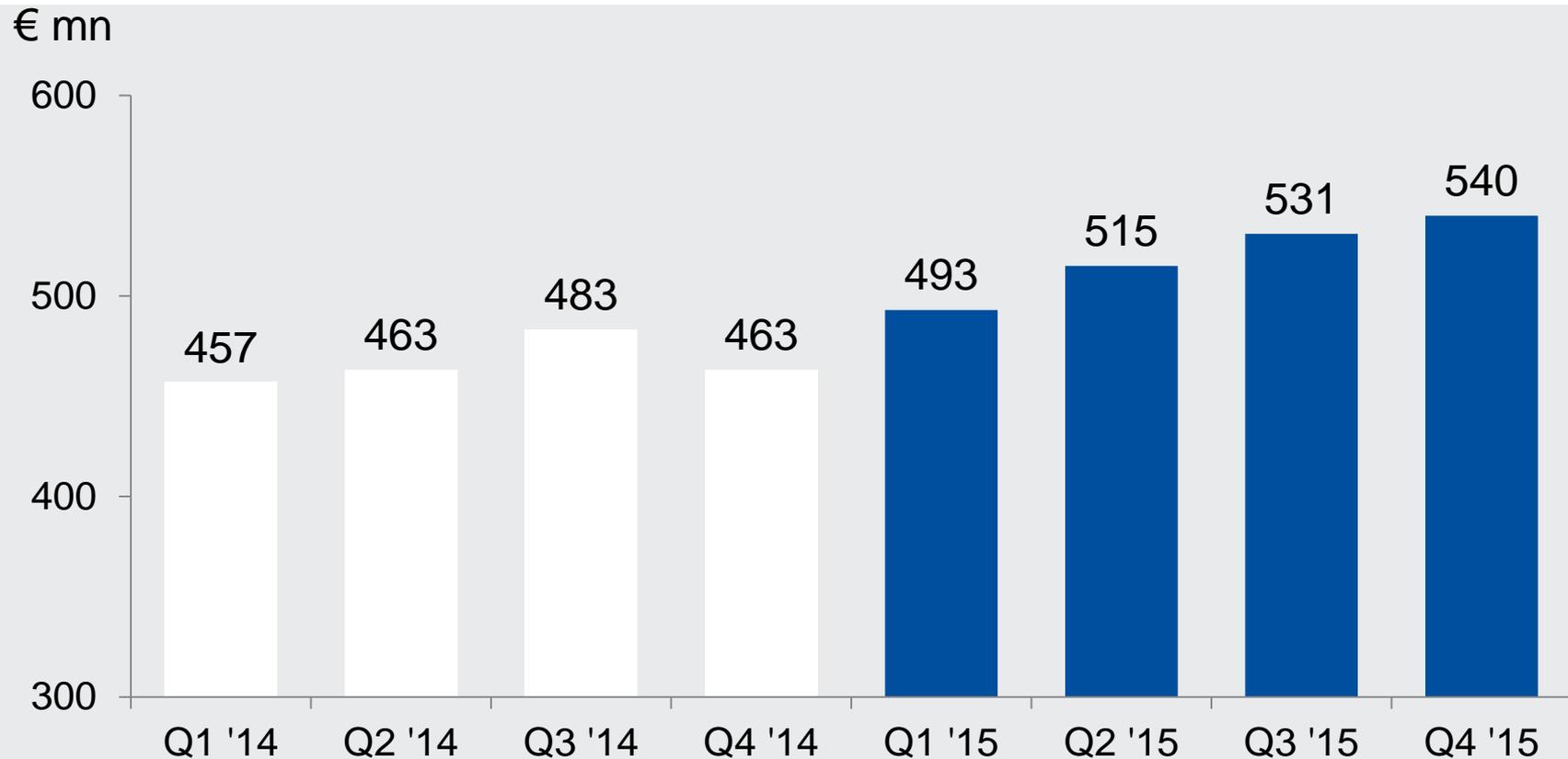
Change in compensation for the executive bodies

- The Executive Board invests 25 % of the variable compensation in FUCHS PETROLUB SE preference shares with a 3 year lock-up period
- The Supervisory Board invests 50 % of the variable compensation in FUCHS PETROLUB SE preference shares with a lock-up period of 5 years, whereby the vesting period is waived when the member leaves the Supervisory Board
- The members of the Executive Board will place their purchase orders as of 21. March 2016 and Members of the Supervisory Board will do so as of 4th May 2016 (AGM)
- Individual mandatory notices will be published (Director's Dealings)

Sales Performance

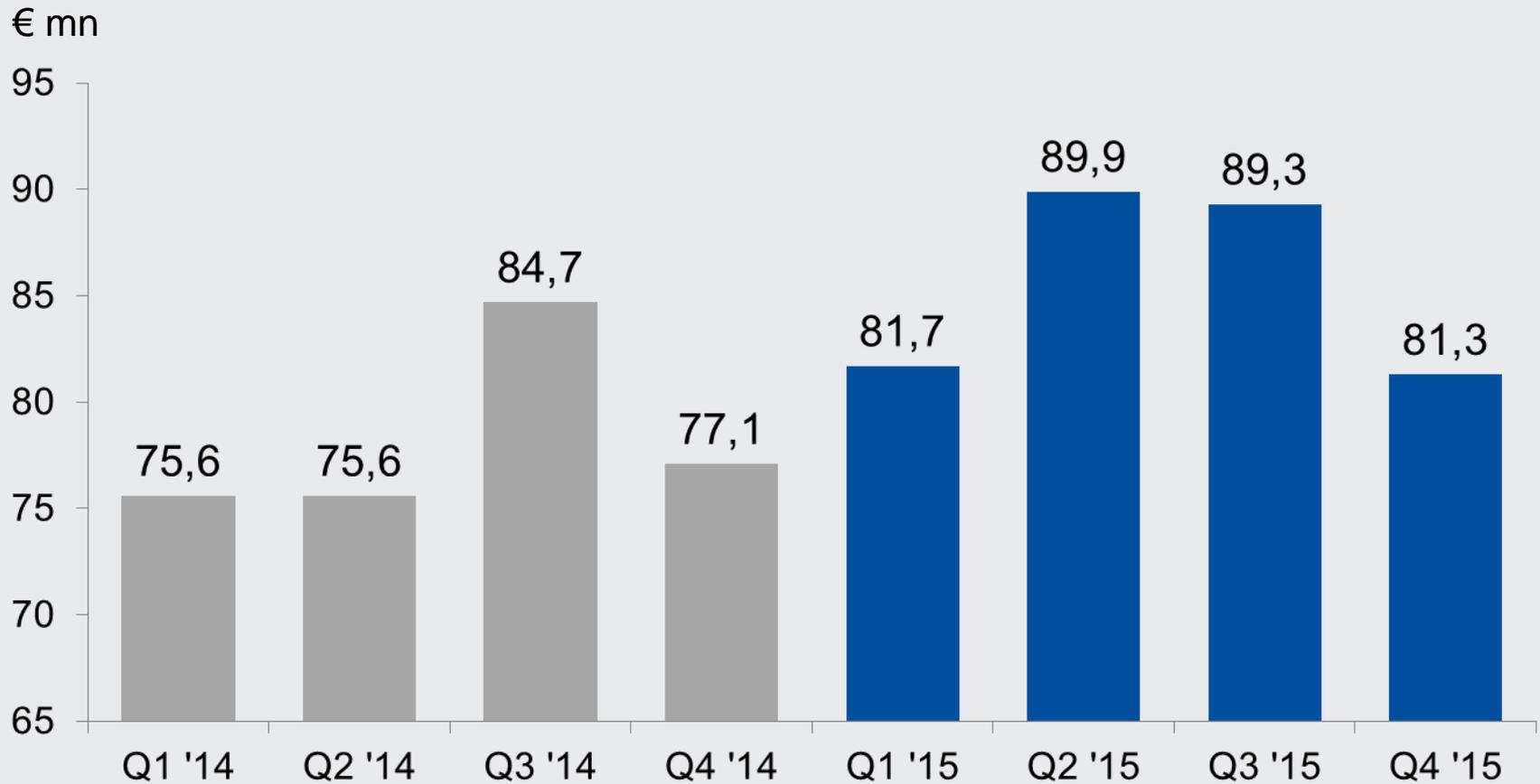
exceeds €2 bn for the first time

Pentosin numbers are included in Q3'15 & Q4'15 and Statoil Lubricants in Q4'15



EBIT Performance

Q4 2015 includes cost of Pentosin & Statoil Lubricants integration





Pentosin Acquisition



- Acquisition of the Deutsche Pentosin-Werke GmbH as of 1st July 2015
- Approx. turnover of €135 mn p.a., 190 employees, 2 plants in Germany (Wedel & Dormagen) and a subsidiary in Brasil (Sao Paulo)
- The Pentosin know-how and the global foot print of FUCHS will work well together
- The integration into the FUCHS group is in full swing:
 - As of 1st March 2016 FUCHS SCHMIERSTOFFE GmbH took over the invoicing process of Deutsche Pentosin-Werke GmbH
 - The merger of the two companies will happen in mid 2016



Statoil Lubricants Acquisition



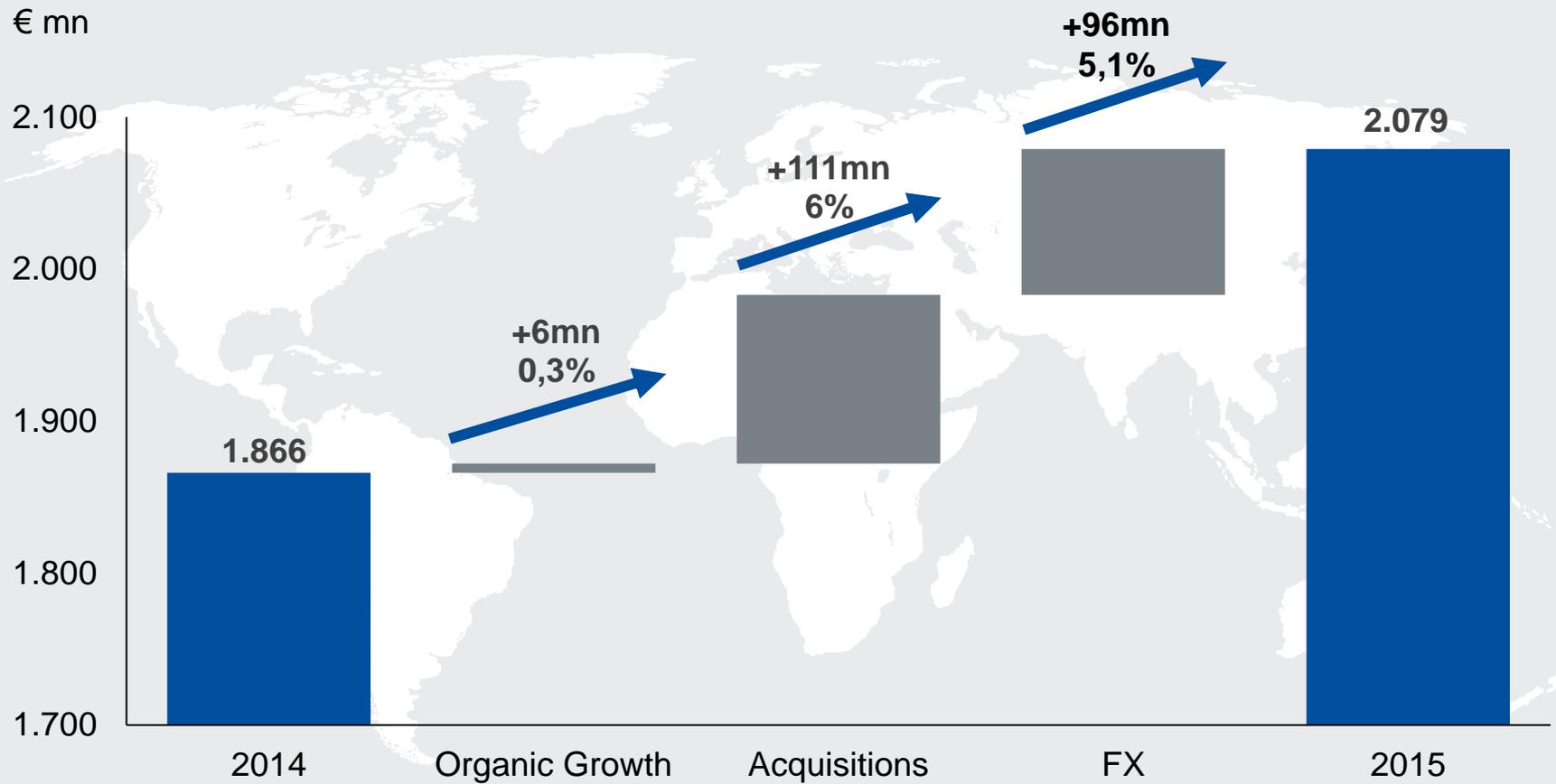
- Acquisition of Statoil Fuel & Retail Lubricants AB, Sweden, on 1st October 2015
- Turnover in the fiscal year 2014/15: approximately €140 mn; 470 employees
- The plant in Nynäshamn is leased; FUCHS will invest in a new plant in Sweden
- The CEO of Statoil Lubricants is managing Scandinavia. The companies in Sweden and Norway will integrate the FUCHS subsidiaries in those 2 countries
- In Poland and Russia the FUCHS companies will integrate the Statoil Lubricants businesses

FUCHS managed to meet all of its key targets for 2015

	Forecast 2015	2015	
Sales			
Organic Growth	Turnover similar to or slightly above the previous year	0,3%	✓
External Growth	In a mid single-digit percentage range	6,0%	✓
Total Growth	Around the 10% mark	11,4%	✓
EBIT	Increase in a mid to high single-digit percentage range	9,3%	✓
FVA	Increase in a low single-digit percentage range	7,2%	✓
Free cash flow before acquisitions	> €150 mn	€232 mn	✓

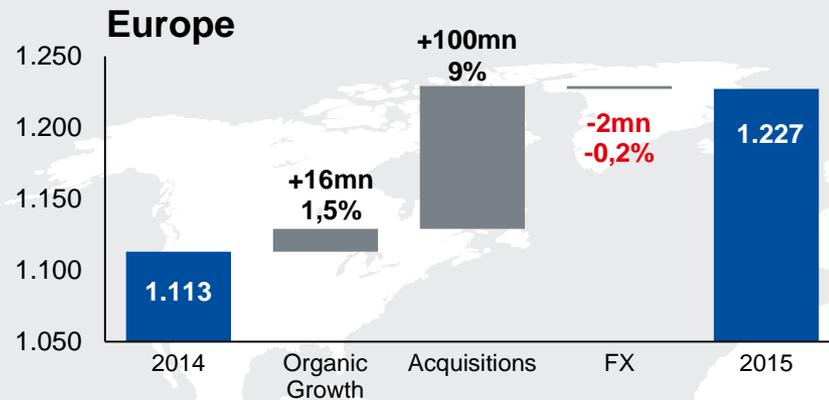
FUCHS Group

Increase in sales by 11,4 %

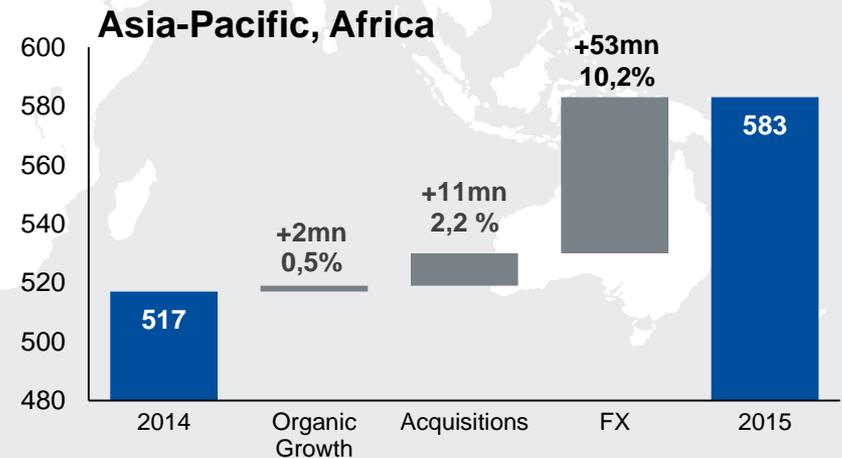
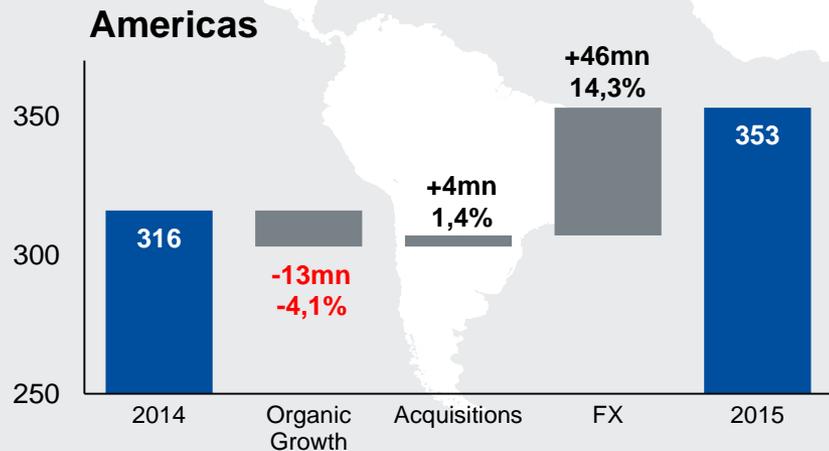


FUCHS Group – Regions in €mn

Increase in sales by 11,4 %



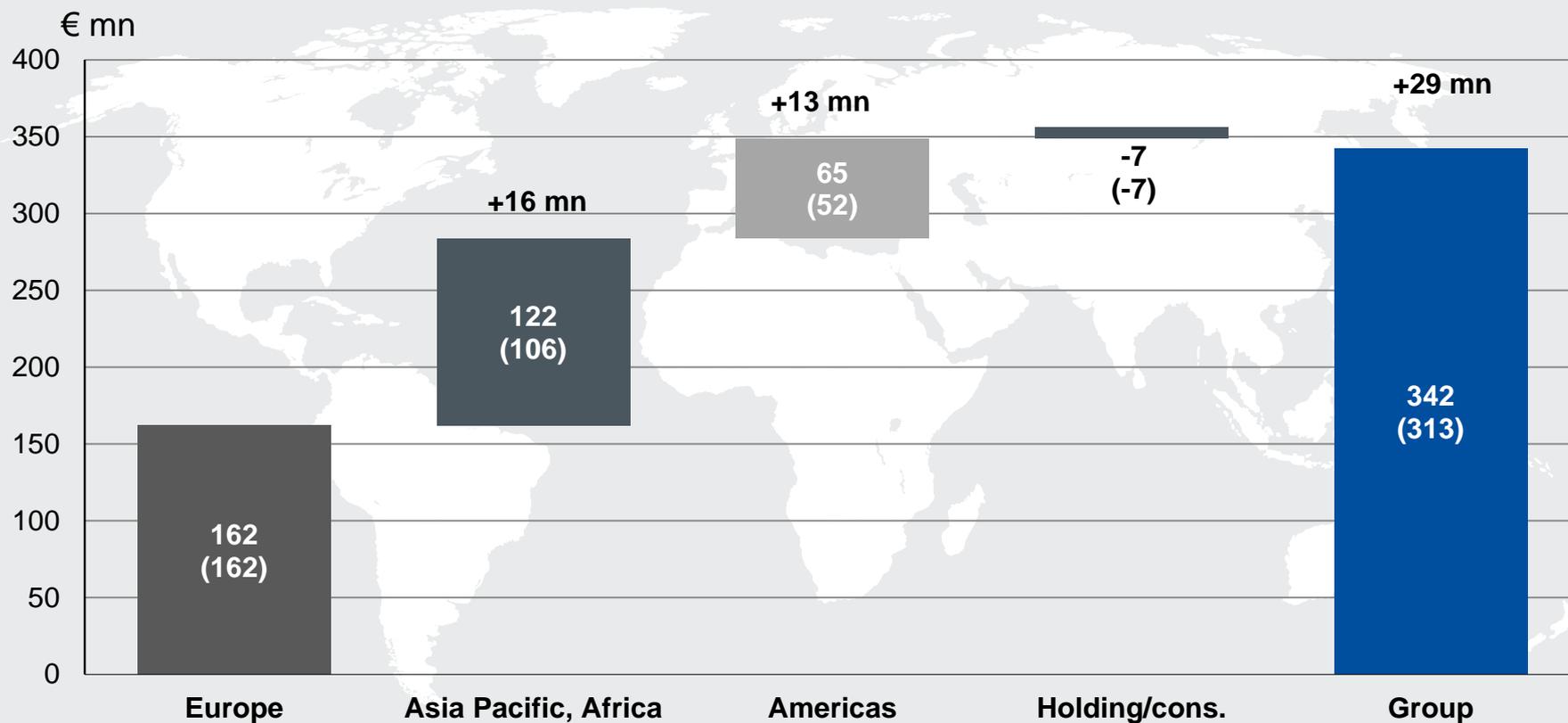
Europe + €114 mn (10%)
 Americas + € 37 mn (12%)
 Asia-Pacific, Africa + € 66 mn (13%)



EBIT increase of more than 9%

€ mn	2014	2015	Δ Mio. €	Δ in %
Sales	1.866	2.079	213	11,4
Gross Profit	693	791	98	14,2
<i>Margin</i>	37,2%	38,1%		+0,9% points
Selling, admin., R&D expenses, others	-400	-467	-67	16,6
EBIT before at Equity	293	324	31	10,9
At Equity	20	18	-2	-12,7
EBIT	313	342	29	9,3
Earnings after tax	220	236	16	7,4

FUCHS Group EBIT 2015 (2014)

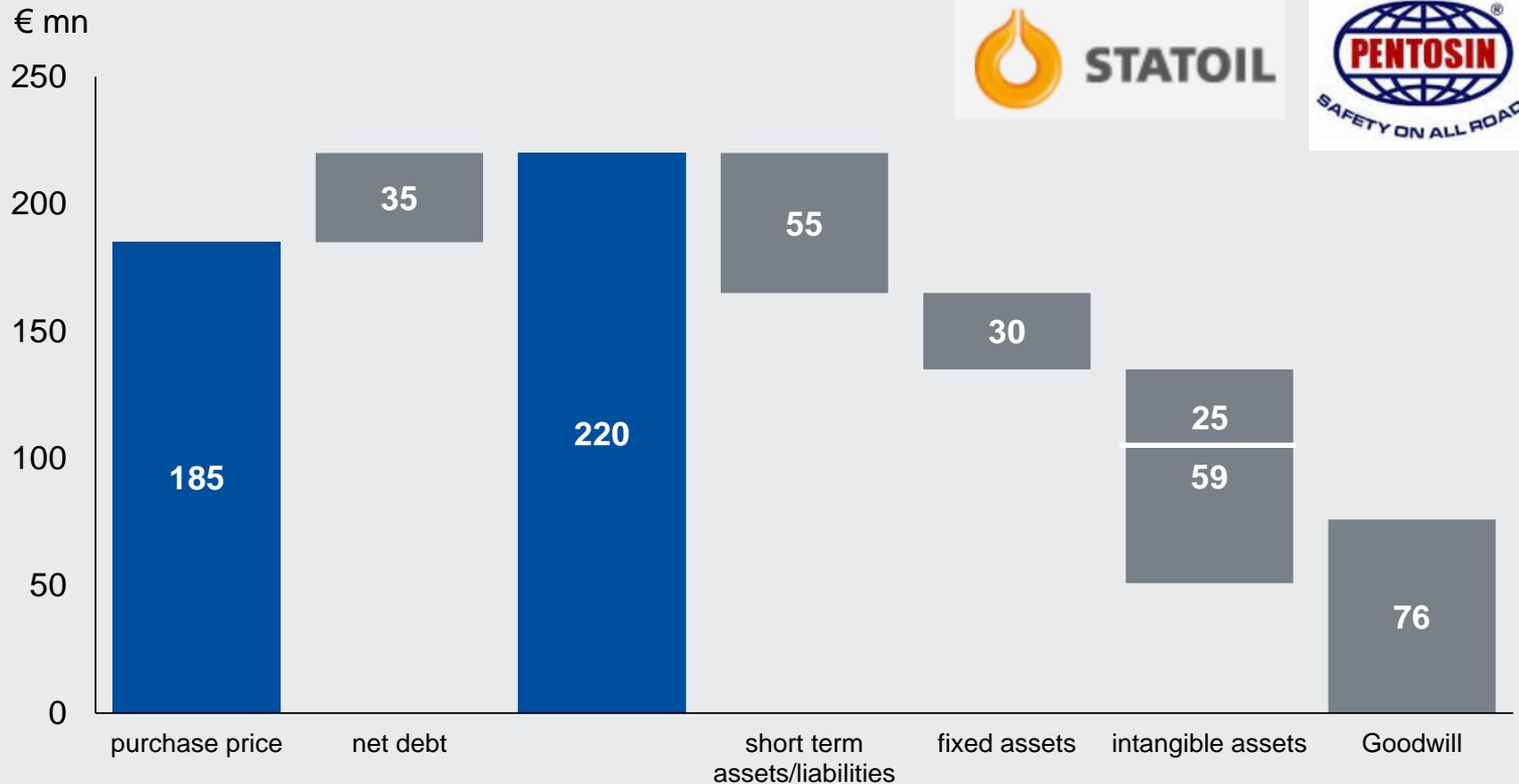


Free Cash Flow

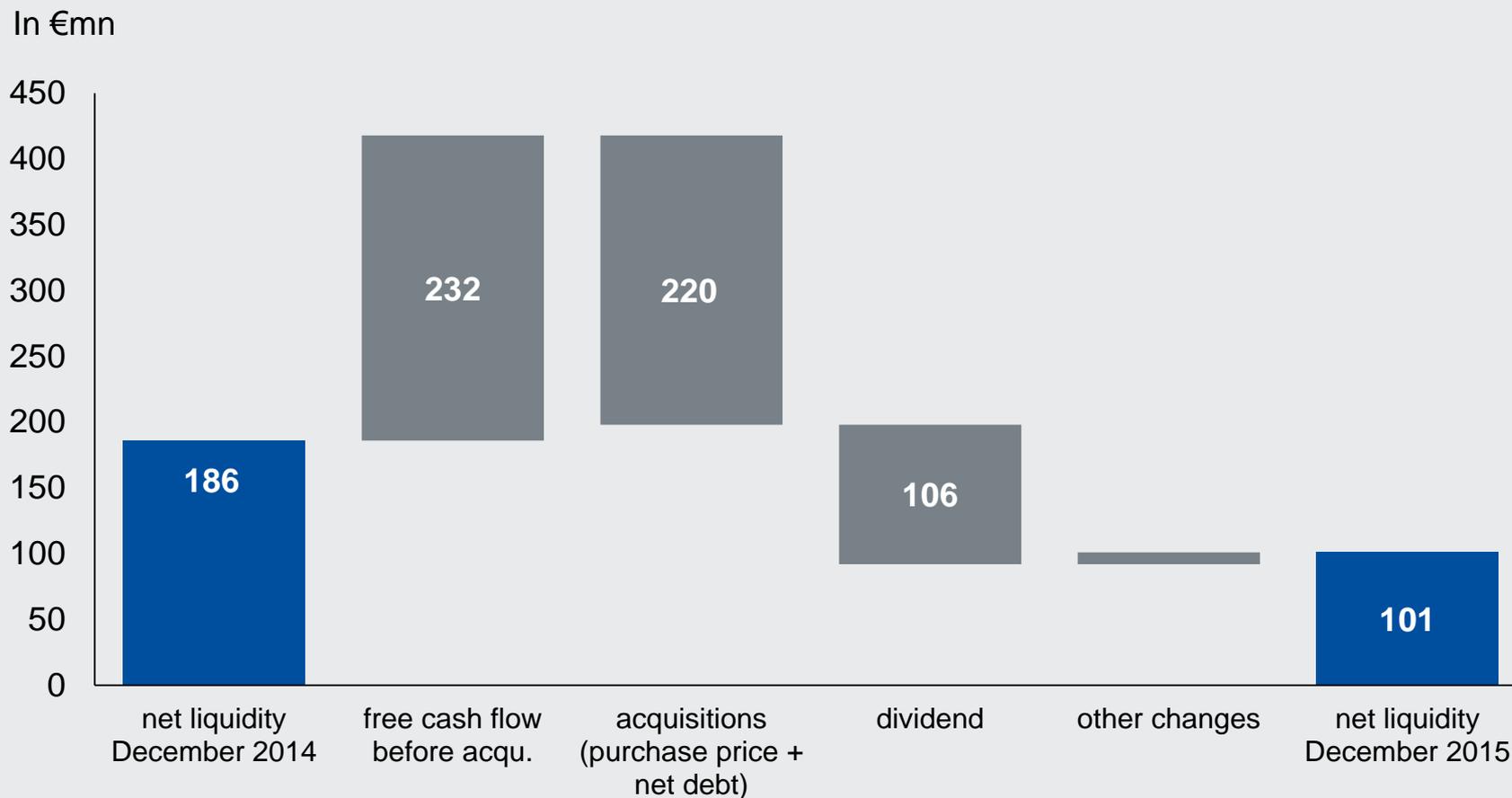
mn €	2014	2015
Gross cash flow	258	274
Changes in net operating working capital	-14	0
Other changes	11	7
Operating cash flow	255	281
Capex	-52	-50
Other changes	7	1
Free cash flow before acquisitions	210	232
Acquisitions	-22	-170
Free cash flow	188	62

Acquisitions 2015

Purchase Price Allocation

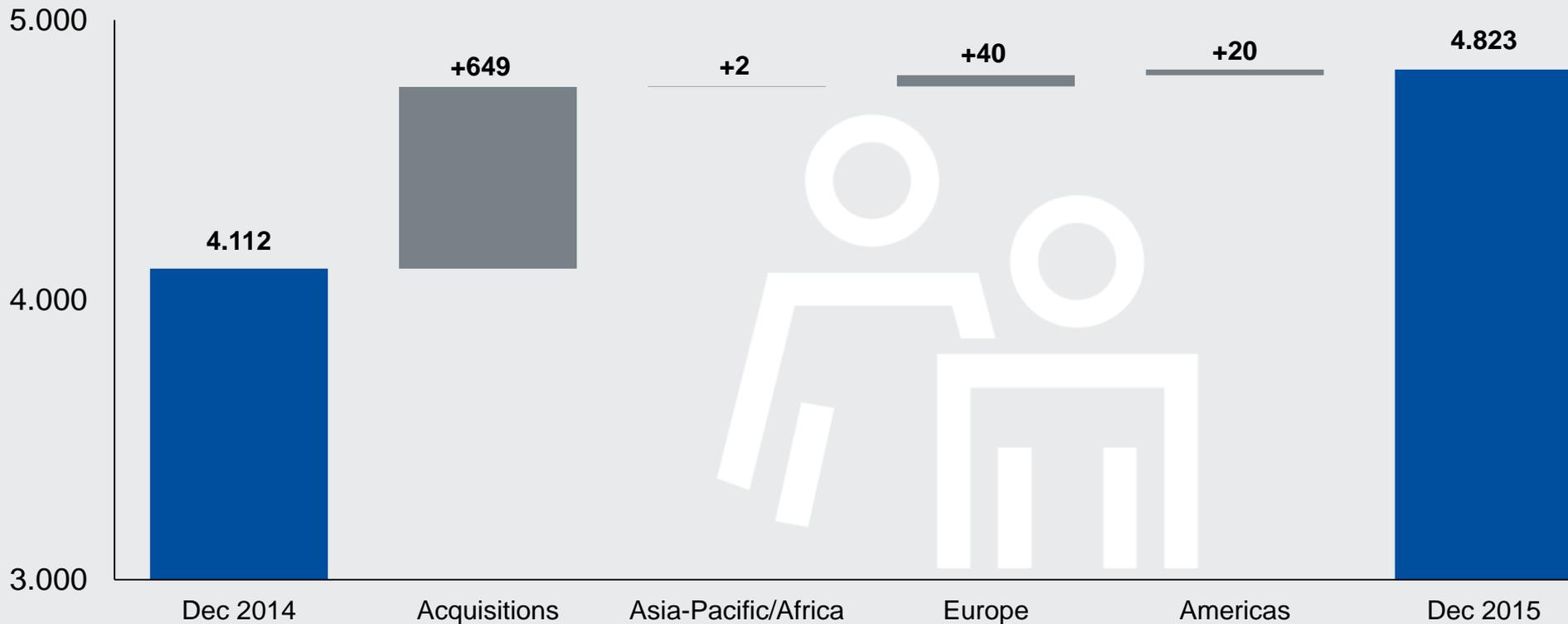


Net liquidity



4.823 employees globally

Increase of 17,3%

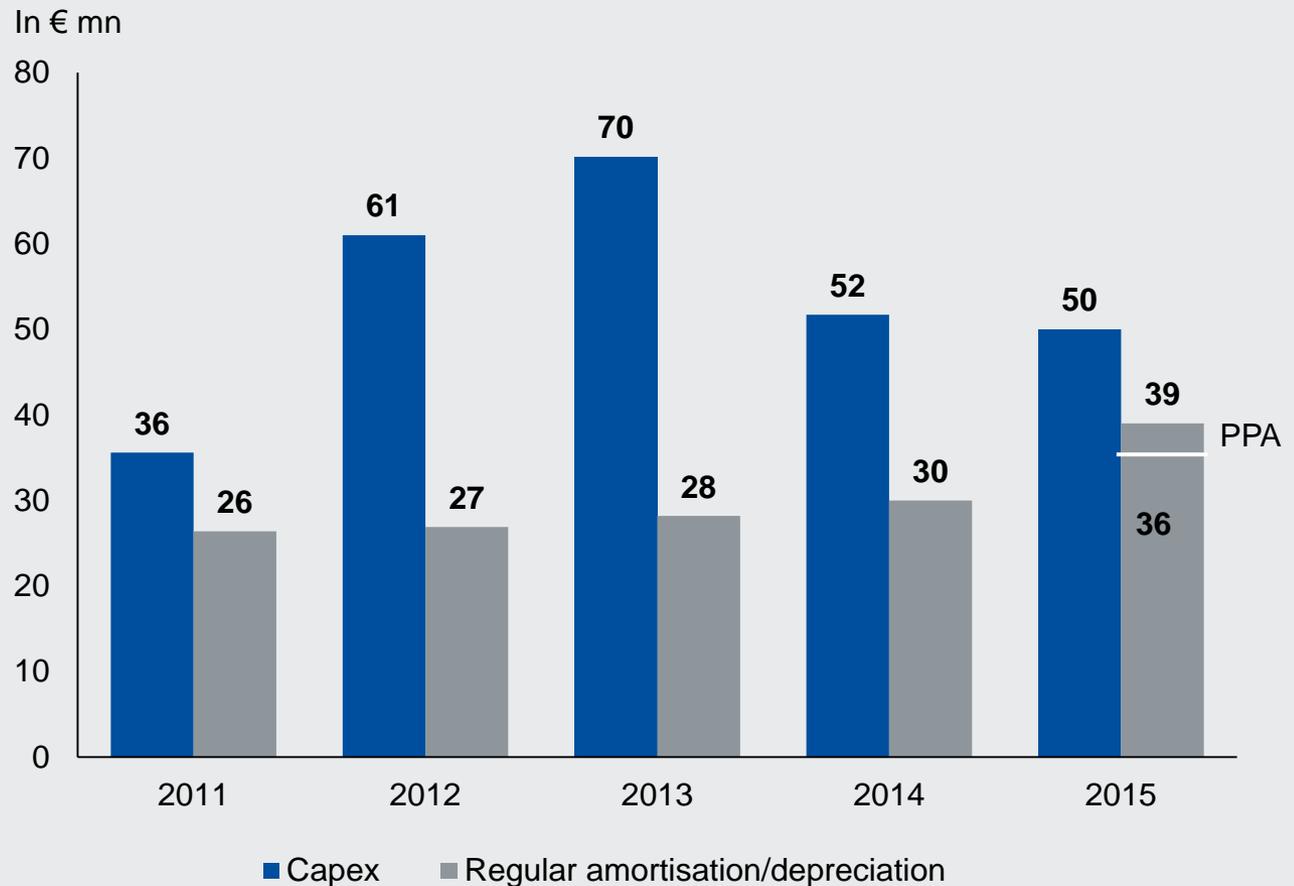


2015

Growth initiative

Investment focus on...

- Construction of new plants in growth regions
- Modernisation and expansion of existing plants
- Expansion of R&D capacities



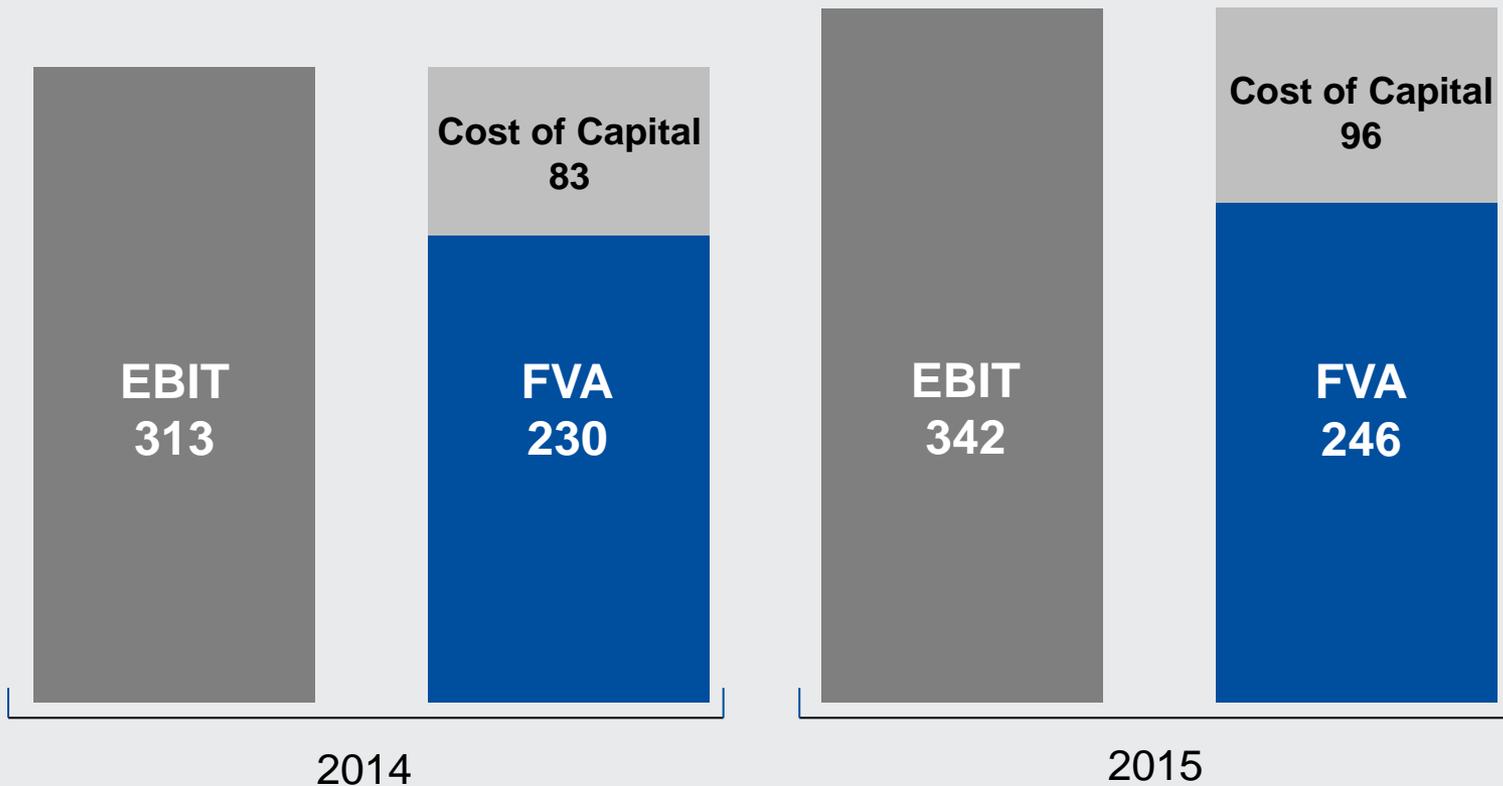
Solid balance sheet

€ mn	2011	2012	2013	2014	2015
Total assets	985	1.109	1.162	1.276	1.490
Equity	658	782	854	916	1.070
Equity ratio	67%	71%	74%	72%	72%
Net liquidity	65	135	167	186	101

FUCHS Value Added (FVA)

Increase by 7,2%

€ mn



Cost of Capital = CE (2014: €833 mn; 2015: €960 mn) x WACC (10%)

Dividend Proposal



0,82 €
(0,77)

per preference share

The Executive and Supervisory Board will propose an increase of **0.05 €** to the Annual General Meeting to be held on 4th May 2016

7%

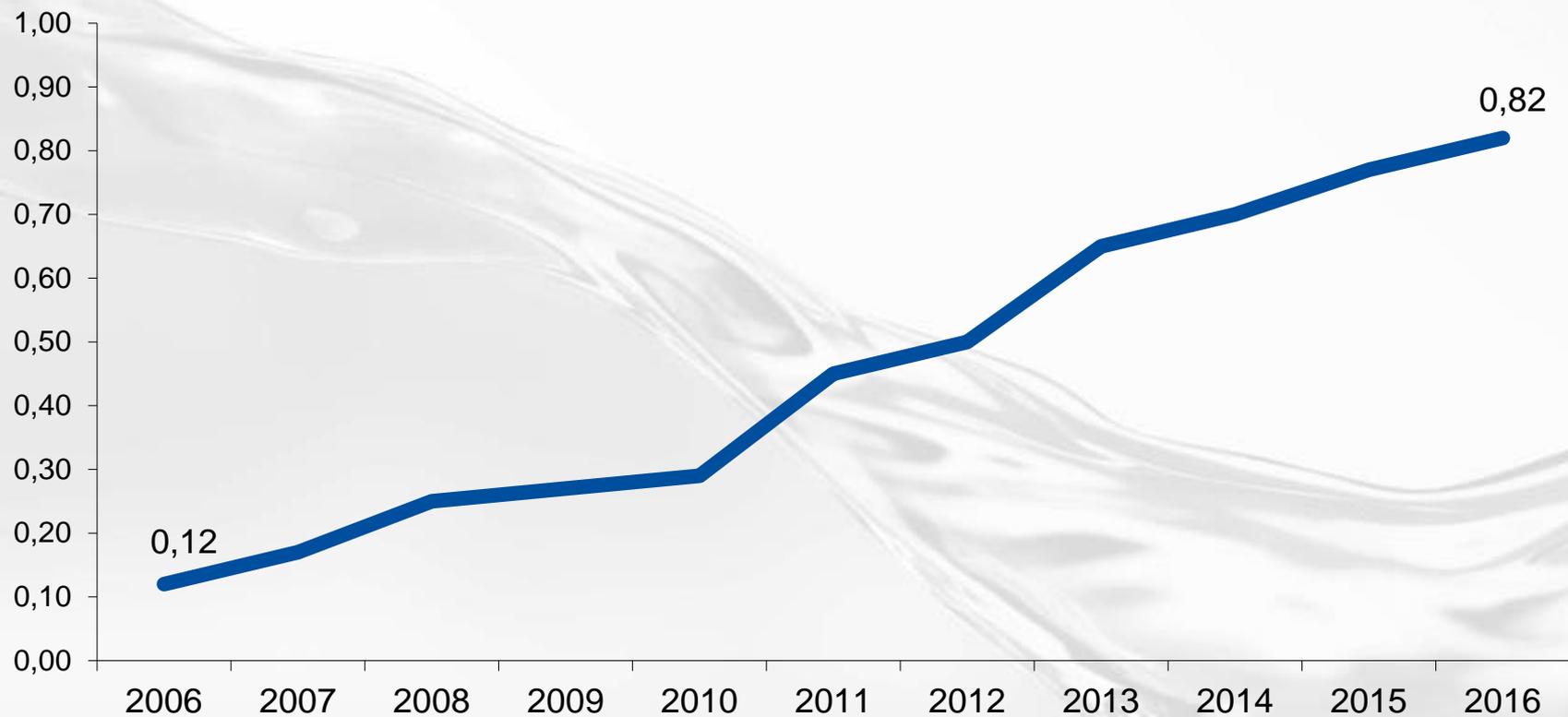
**higher dividend
payment proposed**

0,81 €
(0,76)

per ordinary share

Dividend per preference share

€ per share



Outlook 2016

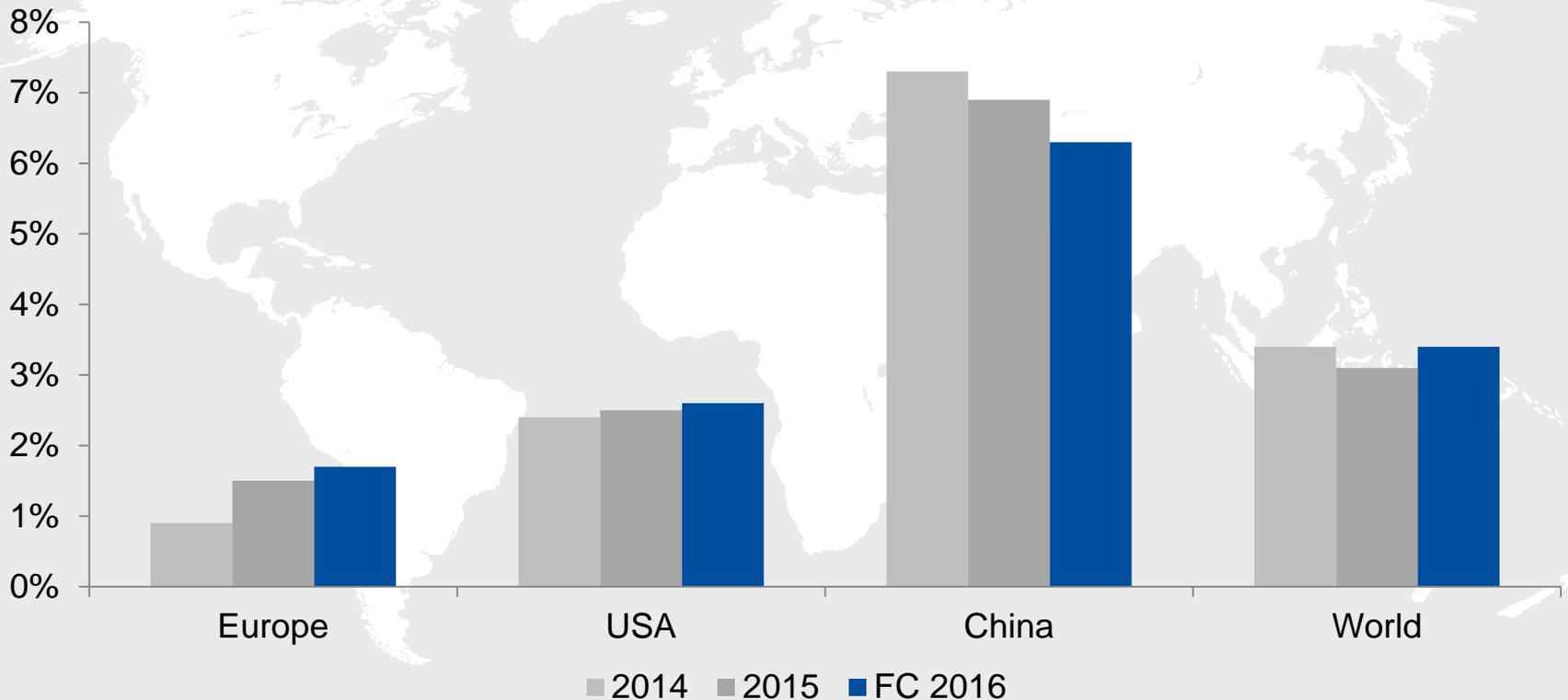


2016 – 2018: Planned investments of €300mn

- Expansion of the Mannheim site
- Expansion of the Kaiserslautern site
- New plant in WuJiang, China
- Expansion of the Chicago site
- New plants in Australia and Sweden

Minor growth in the global economy

Forecasted growth of the gross domestic product compared to the previous year (in %)



Outlook 2016

Performance indicators	Actual 2015		Forecast 2016
Sales	€2.079 mn		
Total Growth	+11,4%	↑	7% to 11%
Organic Growth	+0,3%	↑	Low single-digit %
External Growth (Acquisitions 2015)	+6,0%	↑	High single-digit %
Currency	+5,1%		
EBIT	€342 mn	↑	3% to 7%
FVA	€246 mn	↑	Low single-digit %
Free cash flow before acquisition	€232 mn		€170 mn to €200 mn

DISCLAIMER



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Thank you for your attention

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