



Welcome to nobilia

nobilia-Werke J. Stickling GmbH & Co. KG | Verl, April 30, 2018

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Who are we?

nobilia – Market leader in Germany and Europe

- The largest manufacturer of built-in kitchens in Europe
- Sales of € 1.018,4 million in 2015
- Manufactured exclusively in Verl
- More than 2,870 kitchens are produced daily.
That's more than 630,000 kitchens a year.



Who are we?

630,000 kitchens per year. Each one unique!

Two production sites

- Plant 1 in Verl-Sürenheide
- Plant 2 in Verl-Kaunitz

Performance figures 2015

- 6,3 million units and
1,5 million worktops per year
- 28,700 units and
6,700 worktops per day
- JIT delivery of more than
5,000 electrical appliances per day



What sets us apart?

Plant 1 – Verl-Sürenheide

105,000 square metres of production area

1,600 kitchens per day

16,200 units per day

nobilis

What sets us apart?

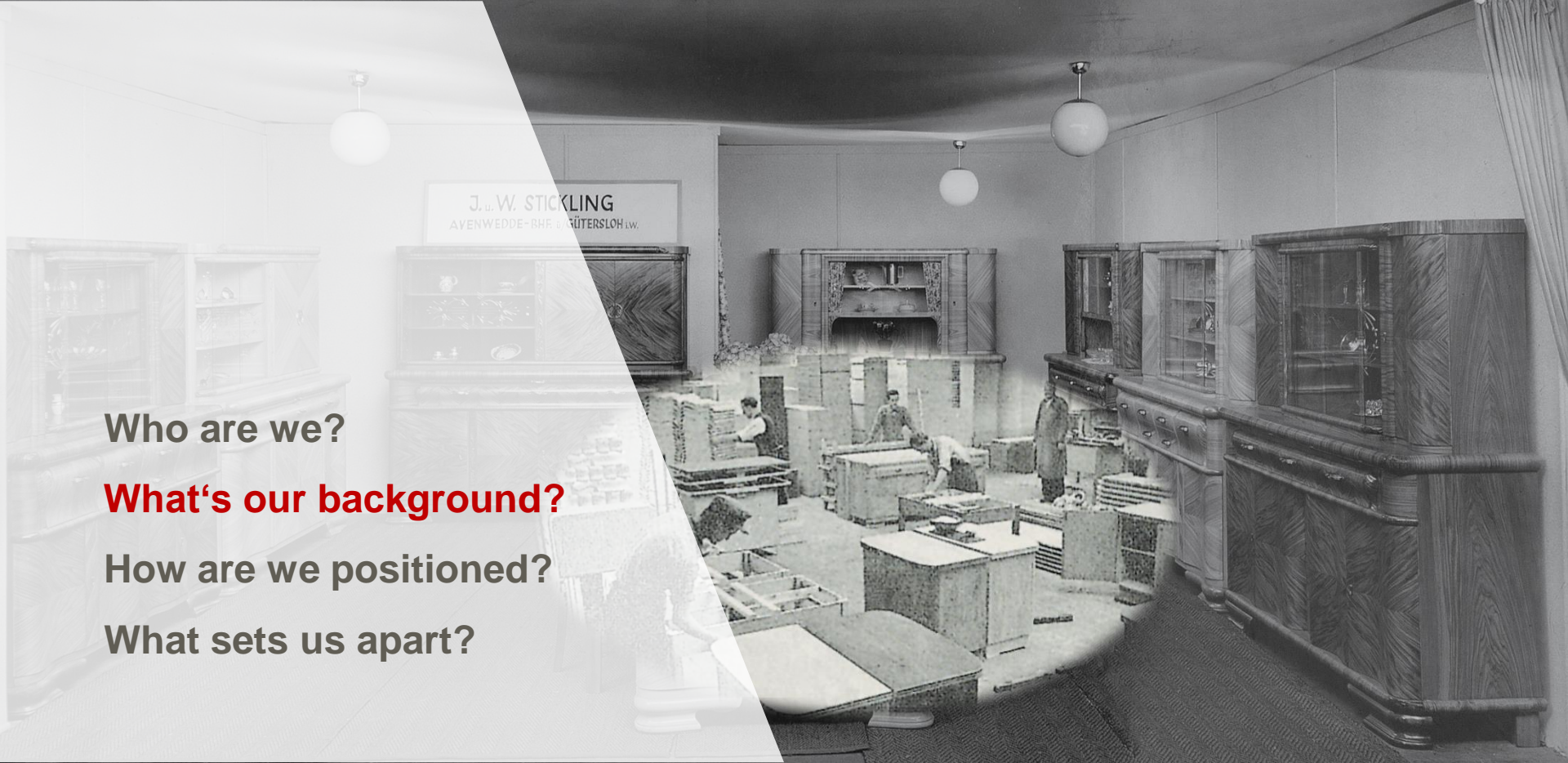
Plant 2 – Verl-Kaunitz

110,000 square metres of production area

1,270 kitchens per day

12,500 units per day

nobilis



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Business development

1945

Master cabinet maker Johann Stickling and businessman Willy Stickling founded Johann and Willy Stickling OHG with seven employees

1965

Johann Stickling hands over the business to his sons Heinz and Werner

2006

Commissioning of Plant 2 in Verl Kaunitz

1956

Johann Stickling specialised in the production of kitchens

1970

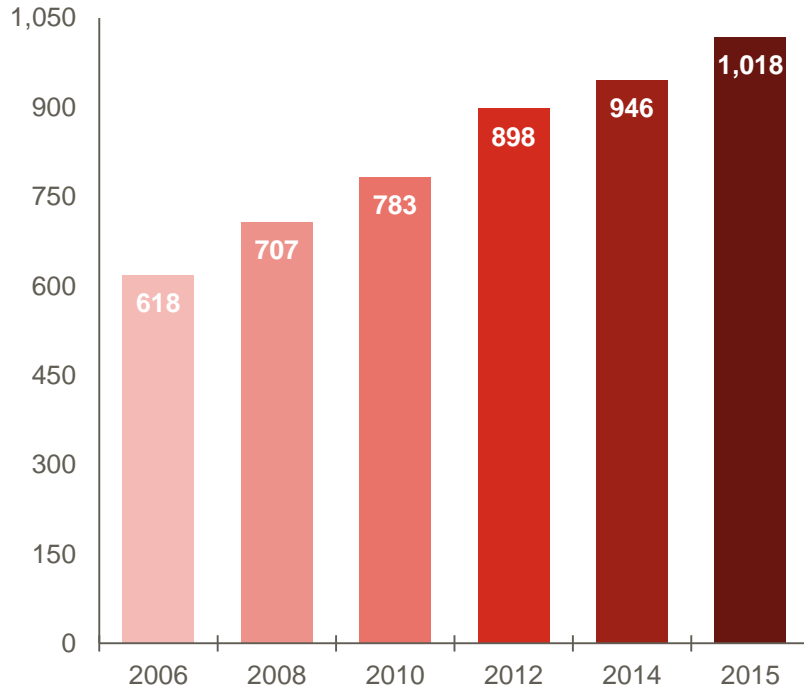
Today's Plant 1 is set up on an initial area of 51,000 square metres in Verl Sörenheide

2015

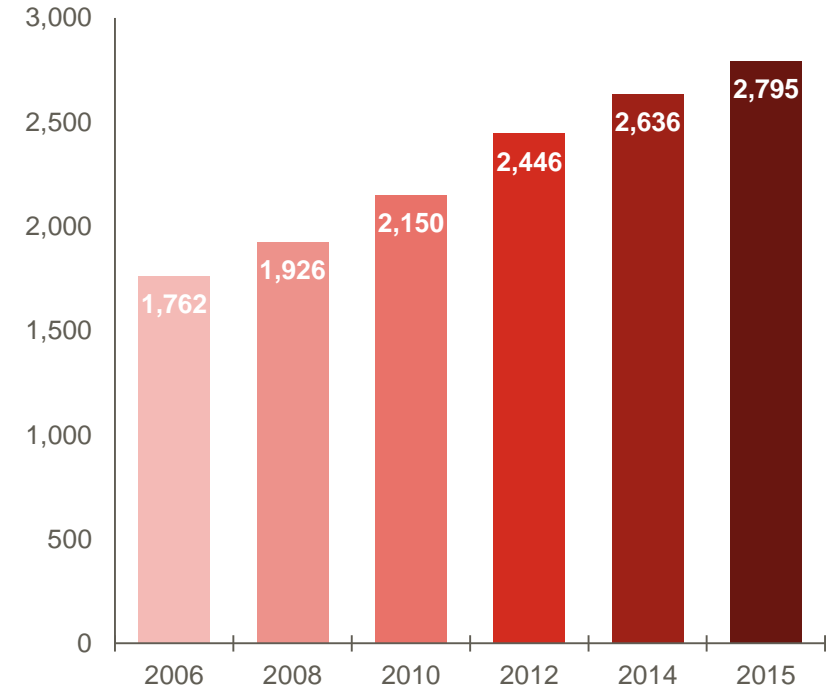
nobilia celebrates its 70th anniversary and cracks the billion mark for the first time with a sales volume of EUR 1,018.4 million.

Business development

Sales in millions of euros



Number of employees





Who are we?

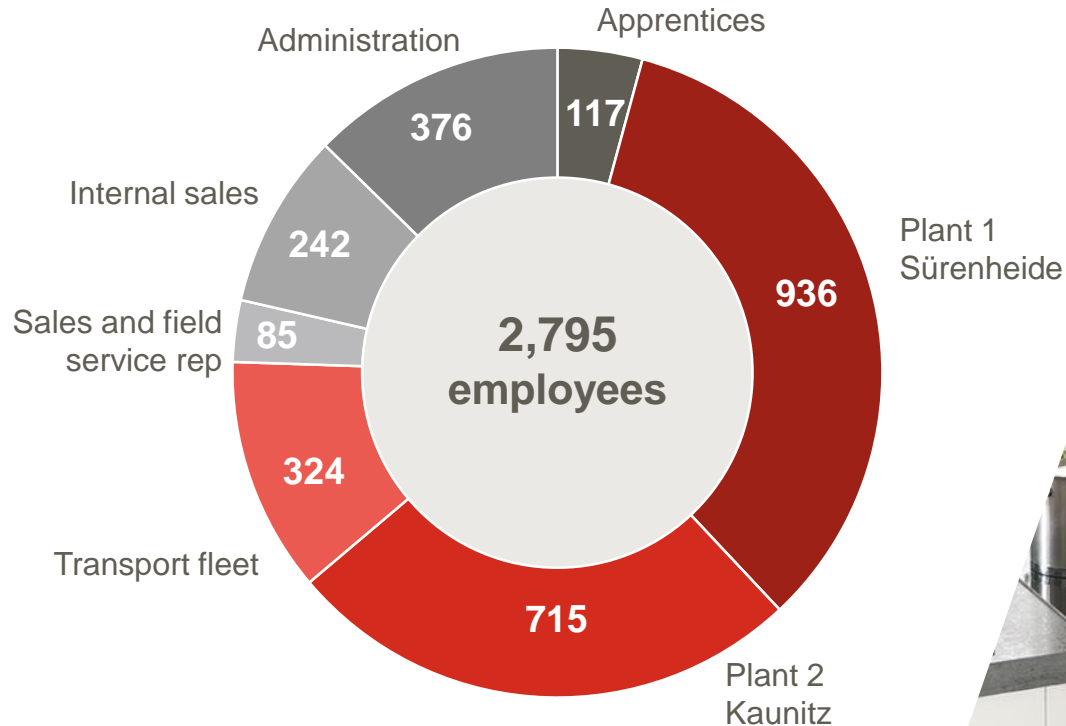
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How are we positioned?

What sets us apart?

How are we positioned?

Employer for 2,795 people



Plant 1
Sürenheide

Plant 2
Kaunitz



Vocational training for 117 apprentices

Commercial professions:

- Industrial clerk
- IT officers
- Bachelor of Arts – industrial degree programmes (DHBW Mosbach)
- Wood technology engineers (BA Melle)

Industrial professions

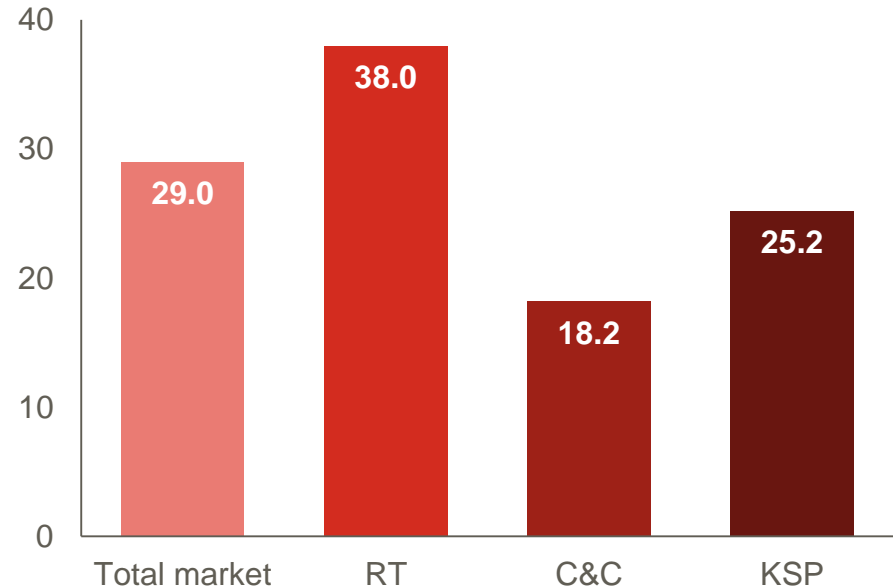
- Mechatronics engineers
- Carpenters
- Woodworking technicians
- Professional HGV drivers



Domestic sales (Germany)

- Domestic sales: € 591.1 million
- Approx. 30 percent of total market (domestic)
- Every third kitchen sold in Germany is a nobilia kitchen
- nobilia is represented in all three kitchen distribution channels

nobilia market share (volume)

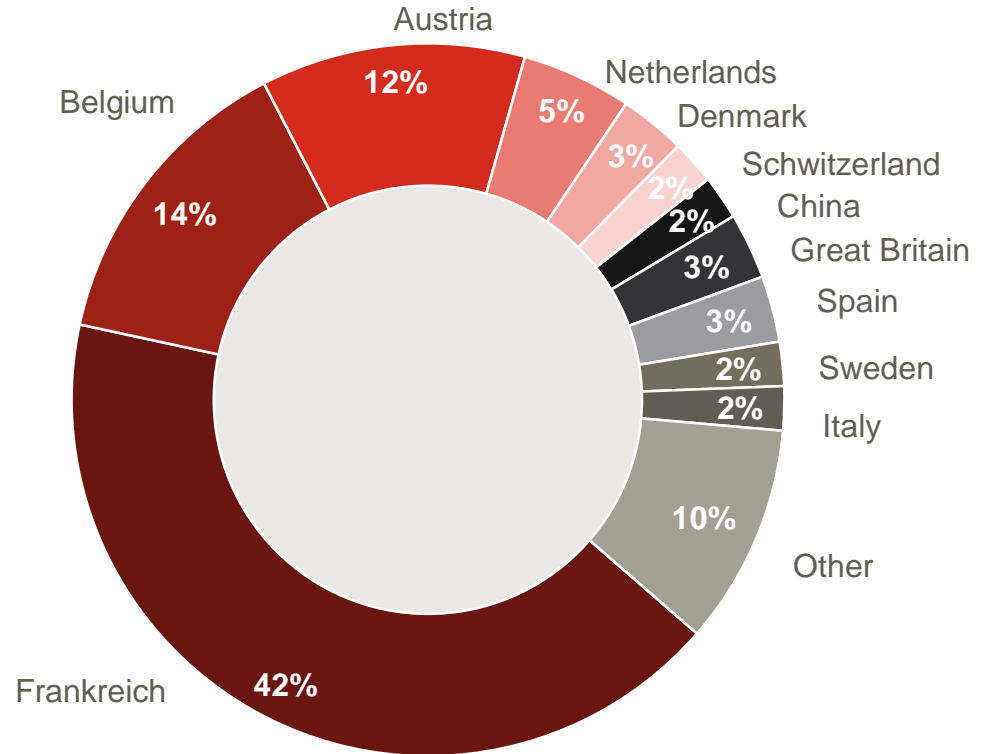


nobilia market share (volume) per distribution channel
Source: GfK, Nuremberg, 1.- 9.2015

RT = retail trade
C&C = cash and carry
KSP = kitchen specialists

International sales

- Export sales: € 427.3 million
- Export quota: 42 percent
- Main export market is France:
Approx. 52 percent of all German
kitchens are supplied by nobilia



nobilia Export Sales 2015, shares according to individual countries



Who are we?

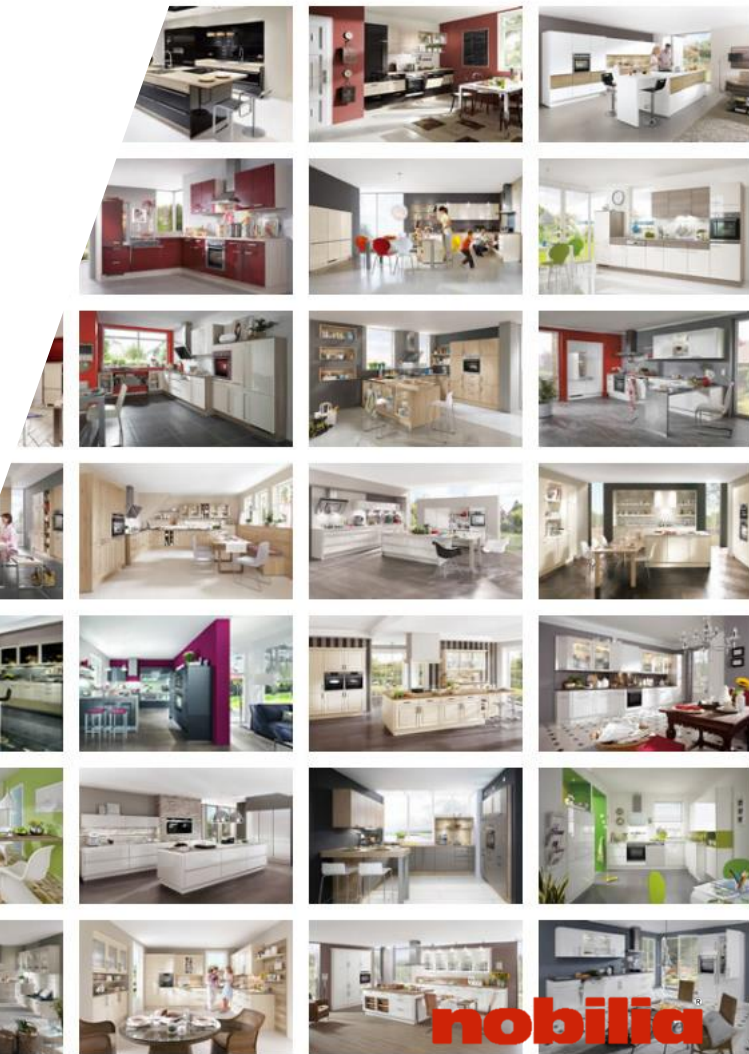
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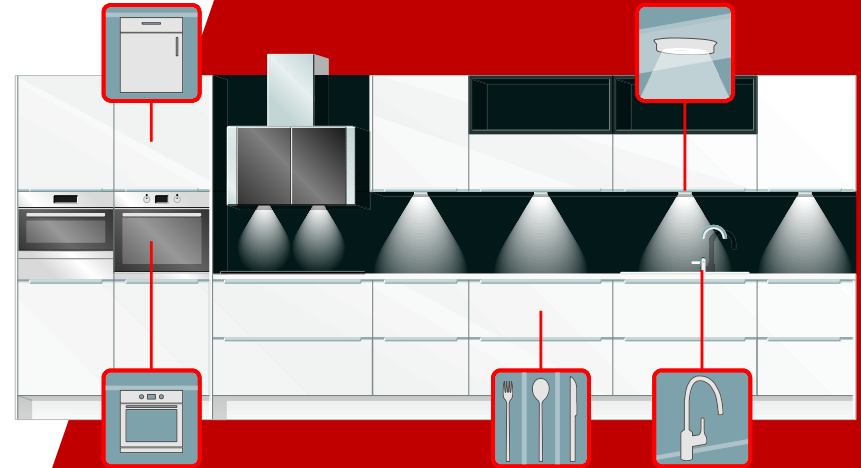
Mathematically that means there are 960 billion possible variants.

- 82 fronts, 76 handles, 17 carcass colours, 46 worktop designs, 86 upstand colours
- Use of all relevant materials such as melamine, lacquered laminate, smooth and textured surfaces, lacquer finish, acrylic and glass, genuine wood
- More than 2,300 cabinets and furniture accessories
- Approx. 560 built-in appliances from 12 brands



“We deliver everything from a single source!”

- nobilia is a pioneer in the end-to-end marketing of fully equipped kitchens, including electrical appliances and accessories
- Simple and efficient – 12 electrical appliance brands, 4 of which are exclusive; Progress and Leonard (Electrolux), Junker (BSH), Altus (BEKO). Four high-end-brands: (AEG, Bosch, Miele, Siemens)
- Complete delivery of all components in a single drop by nobilia
- Reduced errors and fewer customer complaints



„We offer perfect processing!“

- “One face to the customer”
- Customer services in 21 languages
- Graphic order entry prevents confirmation errors
- COE (CAD order entry) with automatic order checking
- Direct electronic ordering via the established planning systems (KPS, Carat and Compusoft)
- Extranet for trade partners with 24 h service



Our quality seal

- Certified quality and environment management system according to DIN ISO standard
- 2009 nobilia is the first kitchen furniture manufacturer to be PEFC (Programme for the Endorsement of Forest Certification Schemes) certified
- Awarded the "Golden M" quality seal by the DGM
- Awarded with the "Blue Angel" eco-label in August 2012 as first kitchen furniture manufacturer
- Extensive material testing in the company-owned quality lab
- Awarded the "Emissionslabel" seal by the DGM



“We deliver the goods on time!”

- Own transport fleet operated by trained, internal personnel
- High delivery quality and punctuality (98.9%); personal contacts
- 320 drivers, well versed in furniture transport and removals, 12 apprentices
- 150 long-distance HGVs, 590 trailers
- 2.2 million cubic metres of cargo volume
- Delivery distance: 17.6 million kilometres per year
→ 1.97 times around the world per working day!





Thank you for your attention