

VAN LEEUWEN



Annual Book
2016

The Van Leeuwen Pipe and Tube Group: more than tubes.

The Van Leeuwen Pipe and Tube Group is a globally operating trading company that specializes in steel pipes and pipe and tube applications. We offer a broad range of customized pipe and tube products and services using a worldwide network of stock-keeping branches. Each day our employees apply their specialist knowledge of sourcing, project management, logistics and stock planning on behalf of customers in the Industry and Energy markets.

We have constantly evolved since being founded in 1924: with more products and services, as well as a network comprising dozens of largely stock-keeping branches in Europe, the Middle East, Australia, Asia and America. We continuously strive for a match between supply and demand in our market, between the customer's wishes and solutions, between innovative developments and their application within our business and that of our customers.



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*‘**More than tubes** is mainly about our **specialisms**: the **international network**, our **distribution expertise**, worldwide **stocks**, customized **services**, global **sourcing** and **project management**.’*



Peter Rietberg
Chairman of the Management Board

A few years ago, Van Leeuwen introduced its corporate image *'more than tubes'*. From the company's foundation in 1924, we have continuously evolved to supply our customers with more than just tubes. Nowadays we offer our customers a broad package of products and services using a worldwide network of dozens of branches. In more than ninety years we have developed solid knowledge and expertise in the area of distribution, stock planning, and the application of our products and services in various markets and industries.

The image that we combine with the *'more than tubes'* pay-off shows various examples of applications for which our pipes are used, within various Industry and Energy markets in which we play a role: ranging from refinery to crane, from power plant to stadium, from oil platform to hydraulic cylinder.

'More than tubes' is mainly about our specialisms, that we are pleased to highlight in this Annual Book: the international network, our distribution expertise, worldwide stocks, customized services, global sourcing and project management.

It is our employees who give substance to these specialisms and thus to *'more than tubes'*. We therefore like to give them the floor in this Annual Book. Within the entire chain, from start to end-product, it is they who devote themselves each day to providing added value to our customers. They ensure there is cooperation within our international network, take care of daily deliveries to our customers, optimally manage our stocks, provide customized services, purchase the best products, and know how to professionally manage complex projects.

Key figures 2016

(amounts x 1,000 euro where applicable)

	16	15	14	13	12	11
Net sales	548,904	623,346	642,680	629,223	658,345	611,343
EBITDA	6,426	9,708	16,626	18,071	17,589	17,206
EBIT (Operating result)	1,551	4,528	11,869	13,705	13,212	13,240
Net result	650	3,968	7,658	8,878	10,050	12,945
Group equity	161,622	162,258	160,544	154,816	160,433	160,252
Group equity as % of total assets	48.9	46.0	41.5	41.9	40.9	42.4
Net result as % of average group equity	0.4	2.5	4.9	5.6	6.3	8.2
Cash flow (net result plus depreciation)	5,525	9,148	12,415	13,244	14,427	16,911
Number of employees at end of year	1,115	1,221	1,305	1,210	1,218	1,197
Breakdown of sales in %						
The Netherlands	23.3	20.4	20.9	19.4	20.0	21.0
Rest of Europe	36.2	36.2	36.4	38.6	39.2	39.5
Outside Europe	40.5	43.4	42.7	42.0	40.8	39.5

International Network



‘By combining our global network with committed local partners, we offer our customers **the best of both worlds.**’

Riri van Namen-Sutyoko,
Project Manager, Van Leeuwen Zwijndrecht, the Netherlands



Report on 2016



The Van Leeuwen Pipe and Tube Group achieved a small positive result in 2016, despite continuing difficult worldwide market conditions. The global tonnage sold remained in line with the previous year, but lower prices affected the sales volume, putting pressure on the gross margin. Measures were taken in all branches to align costs with the lower revenues. Restructuring costs put further pressure on the net result, which ended up at € 0.7 million.

Van Leeuwen's sales amounted to € 549 million, a decrease of 12% compared to 2015 (€ 623 million). The operating result and the net profit decreased in comparison to last year and were € 1.5 million (2015: € 4.5 million) and € 0.7 million (2015: € 4 million), respectively. The effect of the one-off restructuring costs and the liquidation of our company in Brazil (Tubexpress) amounted to more than € 5 million. The net debt position decreased significantly from € 48 million to € 22 million. Solvency further increased to 49% (2015: 46%).

Market conditions

In 2016, Van Leeuwen was faced with continuing difficult market conditions, particularly in the energy segment. Since the end of 2014, low oil prices have had a strong negative effect on investments in the oil and gas industry. The number of projects coming onto the market was at a low point in the first half of 2016. As a result, our sales volume in this segment decreased significantly.

Traditionally, Van Leeuwen has a strong position in supplying new (greenfield) projects, particularly in downstream. Our order book for these projects, in part due to the unfavorable investment climate, was low at the beginning of 2016. Following a very weak first half of 2016, after the summer, the number of requests for downstream projects increased and Van Leeuwen managed to book a number of large projects. The order book increased steadily, and was at a considerably higher level at the end of 2016 compared to the beginning of the year.

The maintenance and turnaround market showed a positive trend, as oil companies particularly wanted to optimize their downstream operations. On the basis of MRO contracts, Van Leeuwen supplies materials from stock on a daily basis to large and smaller petrochemical and chemical plants.

For several years now, Van Leeuwen has had a contract with ExxonMobil. We take care of all MRO deliveries throughout the world for this company and supply their projects. In 2016, deliveries were made to various sites in Europe, Asia and North America, and even for turnarounds in Africa. A number of projects in Antwerp and Singapore were successfully completed. Last year we also supplied the RAHC (Rotterdam Advanced Hydro Cracker) project in the Botlek, the Netherlands, and the SCANfining project in Beaumont, Texas.

In Europe, Van Leeuwen is primarily active in a large number of industrial segments and has a strong market position. The volume within the various industrial segments was in line with the previous year and in some European countries there was in fact a small increase. There was no significant growth in the machine and cylinder construction segment, while there were positive developments in the steel construction and construction segments. Aside from products such as seamless pipes and bar materials, welded pipes and hollow sections in particular form a key product group in these segments. Unfortunately, during 2016, prices largely remained stable at an historically low level. During the second half of the year there were significant price increases in the welded segment.

Price trends

Also in 2016, prices were influenced by lower demand in an industry plagued by overcapacity, by the global protectionist measures, and by low raw material prices.

Following the decrease in demand that started in 2015, the demand for seamless carbon steel pipes reached a low point in 2016. Although the market for seamless pipes is traditionally international, we observe that these influences are diminishing due to various protectionist measures introduced by e.g. the European Union and America. The result is that Asian pipe manufacturers generally focus on internal markets, the Middle East and Africa. While demand in Europe experienced a slight decrease, the decrease in America, Asia and the Middle East was significantly higher due to a lack of demand for pipes from the oil and gas industry (exploration). As a result, the entire industry was hit hard.

Many pipe manufacturers were forced to take measures by closing various mills, closing down production lines, or staff reductions. An additional factor was the low price of raw materials, such as iron ore and scrap metal. However, in December manufacturers of seamless pipes saw their order books grow significantly, partly due to improved demand resulting from the slowly improving global economic situation.

The market for welded materials was initially weak. However, price levels significantly increased over the course of 2016. Aside from the slight revival in the demand for pipes and hollow sections within the construction segment, this was primarily caused by further protectionist measures by the EU on the import of strip steel (the primary material for welded pipes) from China. These measures were announced to protect a large part of the ailing European steel industry. The continuing strong demand for strip steel by the European automotive industry, combined with a virtually dried up import flow and the increasing prices of raw materials, resulted in price increases for hot rolled coil (HRC) of more than 70% during 2016. This effect was not only limited to Europe. These price increases for primary materials influenced the ultimate price of welded pipes.

The price trends for stainless steel welded pipes was similar to that of welded materials. During a large part of the year the low market demand and overcapacity at welded pipe manufacturers played an important role in setting prices. Real price increases only took place later in the year, in part due to the influence of increasing nickel prices. The EU's protectionist measures against the import of seamless materials from China were retained in 2016.

Worldwide trends

Europe

Most of the Van Leeuwen companies in Europe were affected by low and declining material prices during the year and low demand in the energy segment. In particular, the results of our Dutch companies were below the results of previous years. At the beginning of the year, the (project) order books were too low and there was little market activity. The volume supplied to various industry segments by contrast was at a higher level than in the previous year. The loss of sales in the energy segment experienced by the European distribution companies was more or less offset by higher sales in the industry segment.

The Van Leeuwen Zwijndrecht organization in the Netherlands was restructured in the second quarter. Mid-2015, important steps had already been taken to reduce costs, particularly within logistics. On the basis of the program *Samen Beter* (Better Together) initiated at the time, the internal logistics processes in particular were reviewed. By implementing productivity measurements (KPIs) and new ways of working, and by creating clearer, shorter lines of communication, the operating costs have since decreased considerably. In spite of the one-off costs associated with the reorganization, Van Leeuwen Zwijndrecht managed to close off the year with a positive result.



Van Leeuwen Stainless and Teuling (the Netherlands), experienced a very difficult year, in part due to low investments in projects, low material prices and the excessive stocks of these materials in Europe. Our company Combulex in the Netherlands, realizing a significant portion of its sales in the groundwork, road and construction market, strengthened its market share. To deliver more added value, together with a customer Combulex developed a special micro piling tube, a new product for foundation repair applications, that can be screwed together without welding. The high-quality thread can withstand high pressures. To be even better positioned in this segment, significant investments will be made in 2017 to further increase the capacity and efficiency of our flare machines for these foundation piles.

Our two distribution companies in Belgium, Van Leeuwen Belgium in Vilvoorde and Wauters in Brussels, both strengthened their market position. Van Leeuwen Belgium in particular experienced a great deal of growth in welded materials within the construction segment. The profitability of Wauters, which specializes in the supply of bar steel to customers in the hydraulics, mechanical engineering and equipment manufacturing sectors, improved significantly. Custom service concepts, reliable deliveries and fast cutting services played an important role.

Our distribution company in the United Kingdom, as well as a large number of competitors, experienced a great deal of difficulty due to the effects of Brexit. Brexit not only caused a drop in the English pound, but also created, and still creates, a lot of unrest and uncertainty. Due to the weakening of the currency, local prices increased significantly, which customers were not always ready to accept.

The distribution companies in France and the Czech Republic had an excellent year. A number of large deliveries for pipelines in North Africa resulted in very good results for Van Leeuwen in France.

Our earlier investment in a large logistics warehouse in Vyškov in the Czech Republic, with modern facilities and centrally located near Brno, is bearing fruit. Van Leeuwen has since developed a very strong position in the Czech Republic and in Slovakia. The Polish market is also supplied from this central logistics centre and our distribution operations in Poland are growing steadily.

Middle East

Our companies in the Middle East managed to further strengthen their position in 2016, despite the fact that the level of investment in the oil and gas industry in this region decreased considerably in recent years. A number of large projects booked in the previous year were completed, while a number of new projects were added to the order book. Our offices in Dubai, Abu Dhabi, Saudi Arabia, Qatar and Oman not only work closely together in the region, but also make use of other project teams in Europe and our procurement office in China.

Our warehousing site in Dubai benefited from the increased construction activities relating to the hotels and exhibition buildings required for Expo 2020 in Dubai. The level of activity in Qatar was also higher, due to the construction of football stadiums, hotels and new infrastructure for the 2022 World Cup football championship.

Asia

There was less growth in Asia compared to previous years. Although our companies in Thailand, Malaysia, Indonesia and China strengthened their market position, market demand in Singapore in particular was very low in 2016. The investment level in Singapore was low while the number of active players in this market remained relatively high. On the basis of a strong network of offices in the region, together with commercial teams that are generally coordinated by the regional office in Singapore, primarily projects in the Middle East were supplied via Korean and Japanese engineering firms.

► Projects

Van Leeuwen has solid in-house knowledge and experience in the area of large-scale project execution and is capable of optimally supplying materials to complex investment projects carried out by engineering firms. We in particular have a great deal of experience in projects implemented on a global scale. That starts with our sourcing expertise: through our knowledge of and contact with mills anywhere in the world, we can find just the right combination of price and quality, in accordance with the customer's preferences. Furthermore, our teams have access to advanced project management tools, enabling us to have the purchased materials with all the required documentation delivered at the right time and at the right place.

Our Chinese branch, with offices in Shanghai and Tianjin, played a key role in the sourcing in China for other Van Leeuwen branches. The local market in China remains difficult, in part due to the enormous overcapacity at local mills. The trend in which increasingly more Chinese engineering firms are focusing on large petrochemical projects outside China persisted. Due to our long-term presence in China we were able to also supply a number of these projects from our warehousing site in China and from our global stocks.

Australia

While growth in the Australian market was limited, our market position continued to be as strong as ever. While in past years there were good opportunities with regard to large LNG projects, there were very few new investments in 2016. Investments in mining were nowhere near the level of previous years.

Van Leeuwen is a market leader in Australia in the hydraulics and fluid power segment. However, this segment is showing little growth and is in fact consolidating. On the other hand, there were more investments in infrastructural projects and our warehousing sites in Sydney and Brisbane in particular experienced positive growth. In Sydney, the warehousing site was further expanded to accommodate the storage of large diameter welded pipes.

Brazil and North America

The situation on the Brazilian market, which had already deteriorated in 2015 under the influence of low oil prices and local political and economic conditions, did not improve in 2016. Unfortunately we were therefore forced to halt operations in this country. We closed our branch in Brazil over the course of 2016, which involved significant one-off liquidation costs.

Project activity in the United States was at a low level during the first half of 2016. In addition, there was a major decrease in prices, and stocks held by major pipe distributors in Houston were excessive. The market recovered somewhat later in the year because many scale gas producers had adjusted to an average oil price of approximately USD 50 per barrel. Other requests, for example for LNG (storage) projects, are slowly coming onto the market. Our project office in Houston is well-positioned to further grow sales over the coming year.

In addition to the regular MRO activities for ExxonMobil in the United States, deliveries for scheduled turnarounds, as well as for a number of mid-size projects grew, including the SCANfining project for the ExxonMobil refinery in Beaumont, Texas. Daily deliveries from stock took place in cooperation with our local partner, Lockwood International, a key supplier of industrial valves in the United States.

The Van Leeuwen branch in Canada experienced a very difficult year. Our footprint in Canada was further reduced in 2016, and Van Leeuwen is now operating from a large warehousing site located in Edmonton in the Province of Alberta. Our company in Canada remains highly dependent on developments related to the extraction of oil and gas from oil sands. Due to the low oil price, operations are at a low level. In addition, the market was negatively affected by the huge forest fires that erupted in that area at the beginning of 2016. Towards the end of 2016, the situation was slowly moving in a more positive direction.

Profitable despite significantly lower tonnage prices and one-off restructuring costs

The consolidated net sales of the Van Leeuwen Pipe and Tube Group amounted to € 549 million. The decrease in comparison to 2015 (€ 623 million) is mainly caused by the significantly lower average sales price per ton. As a result, the gross margin on sales declined to € 106 million, but on a percentage basis rose to 19.3% of consolidated sales (2015: 18.5%). The tonnage sold under these difficult market conditions remained virtually the same in comparison to the previous year.

Timely measures were taken in anticipation of the deteriorating market conditions, including closing our operations in Brazil, a reorganization in the Netherlands, and further cost reductions. In spite of the one-off costs amounting to more than € 5 million associated with these measures, the operating result (EBIT) amounted to positive € 1.5 million.

In comparison to last year, total costs declined by over € 6 million to € 104 million. Despite the one-off effect of the above-referenced measures, Van Leeuwen at the end of the year came out at a positive net result of € 0.7 million.

The operating working capital was brought in line with the company's operations. A decrease of € 25 million in operating working capital was achieved, bringing it down to € 180 million. This significantly improved the company's cash position. Our net debt position further decreased from € 48 million to € 22 million. Van Leeuwen Pipe and Tube Group's cash position and bank facilities are more than adequate to meet the company's financing needs. The group equity remained stable at € 162 million and solvency improved considerably from 46% to 49%.

Developments within the organization

Personnel developments

In branches throughout the world, our employees each and every day devote their local knowledge and expertise to providing the best possible service to our customers. Our employees represent 36 different nationalities and work in 38 branches in 22 countries. Women comprise 29% of the total workforce, men 71%.

To effectively adjust our organization to the difficult market conditions, we decreased the number of employees from 1,221 to 1,115 in 2016.

The growth and development of talented employees within our company is of major importance, as is flexible employability and (international) mobility. In-company training programs are organized and external training organizations are used in support of this.

In 2016, various colleagues in the Van Leeuwen Pipe and Tube Group changed jobs within their own company or took on a job at a Van Leeuwen branch in another country. Flexible employability and mobility are important themes in our personnel policy.

Van Leeuwen considers it an ongoing responsibility to combine growth and continuity with the well-being of employees and the sustainable development of the environment in which we work. Our social commitment is evident in the support for various regional and local activities and initiatives in the areas of sports, culture, philanthropy and education. Van Leeuwen employees regularly emphasize their mutual bond by taking part in sports events, which are sometimes associated with a charitable cause.

Our Code of Conduct clearly sets out our principles relating to the attitude and behavior of our employees. This information is provided and explained to each employee on joining the company. Last year, no code of conduct incidents were reported to the independent representative for Van Leeuwen.



Cost reduction measures

Due to difficult market conditions, especially within the energy segment, and low tonnage prices, revenues were under pressure in 2016.

This necessitated the implementation of cost reduction measures in almost all branches in order to safeguard the company's long-term continuity. Unfortunately it was not always possible to avoid forced layoffs in this respect. Our personnel policy is focused on long-term employment relationships with our employees and on investing in people and teambuilding. The forced layoff of employees is therefore difficult to reconcile with our tradition and corporate culture.

In 2016, there was a significant reduction in employee numbers in some of our Van Leeuwen companies, including Van Leeuwen Zwijndrecht in the Netherlands. Closing our operations in Brazil also involved a large number of forced layoffs. As a result, the total number of employees at year-end 2016 stood at 1,115, a decline of 106 in comparison to 2015.

LeeuwOne

Our strategy in part focuses on strengthening our distribution network in Europe. An element in this respect is that we are increasing cooperation in and integration of our branches in Europe. This effort, for example, focuses on the further implementation of European stock management, enabling us to provide better availability to our customers while maintaining the same stock levels.

We approach European distribution from an integral perspective through means of a network of cooperating warehouses, instead of a single large European warehouse. An important principle in this respect is that we want to be close to the customer and the market at all times.

To achieve this European integration, we initiated the LeeuwOne project in 2016. This project on the one hand focuses on organizational changes in our European branches and on the other hand on the implementation of a completely new SAP S/4 HANA system in Europe. Our systems must be capable of exchanging information with our customers, as well as our suppliers. In the future, we will make this information available to our partners through means of various portals. The implementation of digital applications, such as barcode scanners in warehouses and the implementation of e-commerce by means of webshops, also forms part of the LeeuwOne project.

Operations

To be able to continue our growth and to further expand the services for our customers, we are continuously developing our global network of stock locations, and service and treatment centers. We are further investing in plant and machinery in support of our value added services. The optimization of stock management systems, custom service and logistics concepts helps us reach our customers faster and with a broader and better product portfolio.



► *Distribution*

In the Industry segment, daily distribution and delivery from stock traditionally has been an important pillar for Van Leeuwen. The basis for this is our broad stock portfolio spread across more than ten stock locations in Europe. We supply customers in the steel construction, metal treatment, shipbuilding and mechanical engineering sectors from these stocks. In addition to the traditional form of daily deliveries we are increasingly offering our customers custom solutions. This includes maintaining customer-dedicated stocks of specific pipes and related materials, but also performing additional treatments.

In France, as well as at our bar steel company Wauters in Belgium, we are installing additional cutting machines at the beginning of 2017. Our cutting capacity will also be significantly expanded in Central Europe. Over the past two years, activities in Vyškov, Czech Republic, experienced rapid growth. Therefore a large number of logistics improvements were implemented. To ensure a more efficient flow in logistics, investments were made to allow us to make more effective use of the available warehouse space.

With the support of a specialized external consultancy firm a detailed study was completed of our largest logistics center in Zwijndrecht, the Netherlands, to analyze the logistics organization and flows, and to undertake further efficiency measures in this area. The results of this study provide starting points for making further improvements in our performance and speed-to-market in 2017.

As a distribution company, we also explore how we can organize our transportation more flexibly and efficiently, for example by providing a wider range of transportation options and by combining transports within the Van Leeuwen Pipe and Tube Group. At Wauters in Belgium we have outsourced our transportation to an external logistics service provider. An entirely new truck fleet will provide greater flexibility in line with contemporary transportation demands.

Quality, safety and sustainability

Globally we continuously focus on the improvement of our work processes, in which quality, safe and healthy working conditions, and sustainability are a priority. We set high quality standards for ourselves that are translated into objectives each year. We regularly monitor progress through means of Key Performance Indicators (KPIs) and internal audits.

In December 2015, Van Leeuwen was the first company in continental Europe to be certified for the new ISO 9001:2015 standard by Lloyd's Register. As a leading and innovative distributor and specialist we are committed to lead the way in compliance with this new quality management standard. Our key branches are part of the Group Certificate.

In 2016, we continued our efforts in improving working conditions throughout the world. Our health and safety system is based on the Occupational Health and Safety Assessment Series standard (OHSAS 18001). Van Leeuwen pursues an active safety policy that is producing good results. The frequency index for accidents with absence (IF rate) has dropped to its lowest level since this frequency was initially tracked some seven years ago. For 2017, with an eye on continuous improvement, the objective is more stringent. A new internal awareness campaign will establish clear rules that apply to all Van Leeuwen branches and to all employees, and that will be discussed together in toolbox meetings.





Outlook

We are not expecting any major changes in the current low oil prices and are therefore not foreseeing an immediate or significant recovery of the oil and gas market. Investment programs in the energy segment are expected to remain at a relatively low level. However, there is slight optimism concerning the economic conditions in Europe and it is our expectation that activity within the various European industry segments will increase. Furthermore, the upward trend in the price of materials will continue in the first half of 2017.

Market volumes in the industry, as well as the energy segment, continue to be at a low level in comparison to previous years. However, there is sufficient potential for Van Leeuwen to further strengthen its market position at the expense of the competition. Our global presence with strategic locations and access to important markets play a determining role in this.

Even more so than in previous years, we will invest in our employees and attract new employees in order to provide our customers worldwide with optimal services. Product and skill-based training, the international exchange of employees and an international trainee program also form part of this.

In 2017, Van Leeuwen will continue to invest in improving synergy within the Group, in more efficiency and in added value for its customers. Significant investment will be made in the implementation of an improved ERP platform. An innovative approach will be the key to permanent success over the coming years.

We are positive about the coming year and expect our profitability to improve, in part due to the previously implemented cost reduction measures. Our global market share and strong financial position will enable us to optimally deploy our services and global stocks in the coming year. Based on our strong network and talented and experienced staff, we will further strengthen our market position and continue to optimally serve our loyal customer base.

Zwijndrecht, the Netherlands, 23 March 2017

Management Board

P.L. Rietberg (Chairman)

J.M. Sassen

Distribution Expertise



‘With a single global Van Leeuwen platform,
our customers can **count on the same
high service levels everywhere.**’

Eric Veraart,
Corporate Supply Chain Manager & QSE



Results 2016

Taken from the financial statements of the Van Leeuwen Pipe and Tube Group

Consolidated profit and loss account

(amounts x 1,000 euro)

	2016	2015
Net sales	548,904	623,346
Cost of sales	442,930	507,931
Gross margin on sales	105,974	115,415
Personnel expenses	67,236	72,035
Depreciation	4,875	5,180
Other expenses	32,312	33,672
Total expenses	104,423	110,887
Operating result	1,551	4,528
Interest income	29	140
Interest charges	(1,534)	(2,274)
Net financial income and expenses	(1,505)	(2,134)
Result from ordinary activities before tax	46	2,394
Tax on result from ordinary activities	604	66
Result after taxes	650	2,460
Gain on disposal of financial fixed assets	-	1,508
Net result	650	3,968

- Stable sales volume, in difficult market conditions.
- Improved gross margin, despite sharp decrease in prices.
- Decrease of total costs by more than € 6 million, including one-off costs of more than € 5 million.

Consolidated balance sheet

(before appropriation of profit, amounts x 1,000 euro)

Assets	31 December 2016	31 December 2015
Fixed assets		
Intangible fixed assets	4,055	4,416
Tangible fixed assets		
Land and buildings	23,628	23,884
Plant and machinery	5,211	6,048
Other fixed assets	3,322	3,522
Total fixed assets	32,161	33,454
Financial fixed assets		
Participating interests	1,007	1,035
Total fixed assets	37,223	38,905
Current assets		
Inventories	139,900	151,837
Receivables		
Trade accounts receivable	114,664	126,216
Taxes	10,876	12,193
Other receivables	4,005	3,783
Prepayments and accrued income	5,427	5,505
Total receivables	134,972	147,697
Cash	18,459	14,029
Total current assets	293,331	313,563
Total assets	330,554	352,468

Liabilities	31 December 2016	31 December 2015
Group equity	161,622	162,258
Provisions		
Pensions	10,019	9,023
Taxes	5,023	6,985
Other	11,904	12,008
Total provisions	26,946	28,016
Long term liabilities		
Debts to credit institutions	-	223
Current liabilities		
Debts to credit institutions	40,372	62,479
Trade accounts payable and trade credits	74,958	73,073
Taxes and social security	10,431	10,651
Other liabilities	3,106	3,931
Accrued liabilities	13,119	11,837
Total Current Liabilities	141,986	161,971
Total group equity and liabilities	330,554	352,468

- Significantly improved liquidity and net debt position.
- Increase of the company's solvency.
- Lower invested capital through active working capital management.

Milestones

18 March 2016

Van Leeuwen France was awarded a **large project in North Africa**. Van Leeuwen supplies materials for the interconnecting pipelines between oil and gas fields in the Algerian desert.



16 April 2016

Van Leeuwen teams participate in various sports events, for instance the **Amstel Gold Race** in the Province of Limburg, the Netherlands.



30 April 2016

Van Leeuwen Australia's storage capacity is further expanded by the acquisition of a **new 4,500 m² yard** in Sydney.



29 March 2016

Expansion of the **Vyškov warehouse in the Czech Republic**. After earlier investments in the previous year, in 2016 the cutting capacity is expanded.



13 May 2016

The **Ouwehands Zoo** in the Netherlands has started construction work on 'Pandasia', an accommodation for giant pandas. Van Leeuwen Zwijndrecht, the Netherlands, supplies S355 J2H quality welded pipes for this project.



26 May 2016

Combulex presents Strefa Gipsu with the second model of the **Centennial Collection**. Each year, up to Van Leeuwen's hundredth anniversary, the top 150 customers will receive this exclusive gift.



15 June 2016

During the entire year, Van Leeuwen Zwijndrecht supplies products for the 'RAHC' (**Rotterdam Advanced Hydro Cracker**) project under the global framework contract with ExxonMobil.

22 June 2016

End of the first phase of the **LeeuwOne Project**. In this project, Van Leeuwen teams work on more efficiently organizing international distribution, supported by an optimal IT organization.

21 October 2016

Van Leeuwen Thailand celebrates its 25th anniversary with its entire staff.



7-10 November 2016

Van Leeuwen Gulf is present at the **ADIPEC Exhibition** (Abu Dhabi International Petroleum Exhibition and Conference).



13 July 2016

Van Leeuwen Zwijndrecht, the Netherlands, supplies materials for the **Jazan Project in Saudi Arabia**, the construction of the largest industrial gas complex in the world.



15-17 November 2016

The Van Leeuwen international management team discusses market developments and strategy during the **annual management days**.

3-7 October 2016

Van Leeuwen presents itself at the **International Engineering Trade Fair in Brno**, Czech Republic. This is a leading trade fair that each year attracts more than 1,500 exhibitors and 75,000 visitors from some sixty countries.



Worldwide Stocks

‘We have the knowledge and experience required to make sure the right materials are supplied at the right location, in the right quantity and at the right price.’

Menno Groeneveld,
European Assortment Manager, Van Leeuwen Stainless, Beesd, the Netherlands

US 2x2.5t





More than tubes

International Network

Van Leeuwen serves its customers worldwide on the basis of an international network of about forty branches in Europe, the Middle East, Asia, Australia, and America.

Many branches are stock-keeping. We continuously invest in our distribution network by opening new offices, building new warehouses and expanding existing ones.

Riri van Namen-Sutyoko,
Project Manager, Van Leeuwen Zwijndrecht, the Netherlands

Riri van Namen-Sutyoko devotes her time at Van Leeuwen to preparing proposals and procuring materials for large international Energy projects for engineering firms such as Amec Foster Wheeler, Jacobs and Bechtel. Recent projects include the Shah Deniz Project in Azerbaijan, the South Caucasus Pipeline Expansion, and the Khazzan Gas Project in Oman. All three are gas extraction projects under the BP global framework contract. She also worked several years for Van Leeuwen in Houston, USA.

‘From our international network of quality key suppliers, we provide bulk material to the Capex projects of our international customers. We do this at the right combination of price and quality, tailored to the needs of the customer. The materials are often transported over long distances to their destination. Our advanced tools enable us to deliver the materials we purchased worldwide, at the right time and the right place, with all relevant documentation. Knowledge and experience about the market and the specific requirements of our customers and end-customers are continuously exchanged between

Van Leeuwen’s branches throughout the world. No matter where in the world Van Leeuwen is engaged, an international EPC can depend on the same expertise, service and price levels. For large EPCs this provides security and confidence.

Aside from major construction projects, the MRO contracts in the Energy segment are an important market for Van Leeuwen. We deliver the required products for daily maintenance and turnarounds at (petro)chemical installations from stock. In recent years I was stationed in Houston in the United States as Procurement Manager for the global ExxonMobil contract. There I focused on creating a network of local suppliers for the supply of products destined for MRO projects at ExxonMobil sites. A local network is essential to achieve 24-hour service and respond to urgent orders and the demand for specific products.

At Van Leeuwen we realize that developing quality relationships of trust with local suppliers is not something you do by email. Personal contact is and remains important. By combining our global network with committed local partners close to the customer, we realize the best of both worlds for our customers.’

‘Van Leeuwen is able to respond to any demand and has a solution for any problem.’

Manny Zammit,
Managing Director,
Van Leeuwen Australia



‘We are staying a step ahead of the competition due to our international network, worldwide stock management, and logistics services.’

Ruud Langeveld,
General Manager,
Van Leeuwen Malaysia



‘When I joined Van Leeuwen ten years ago it was a ‘pipe and tube dealer’ that knew its business. Nowadays it is no longer possible to group all of our services under this single header. We do much more than just dealing in pipes and tubes. Our international network of stock-keeping branches, suppliers and partners has grown tremendously. We now guarantee fast and complete deliveries of effectively everything the customer asks for, and that includes the products we do not stock ourselves.’

There not only is a continuously upward trend in the quality of our service, our specialized knowledge also continues to grow. Customers are assured of a quality that meets all specific product specifications. We continuously monitor this through means of audits of new and existing suppliers. Our customers regularly involve us in the preliminary phase of a proposal in order to contribute ideas about specialized products, applications and quality criteria. Often we are able to recommend good, cost-saving alternatives to our customers. Today, Van Leeuwen is able to respond to any demand and has a solution for any problem, and that pays off. In the first quarter of 2017, Van Leeuwen Australia was engaged in a record number of distribution activities, in spite of the decline in large projects in the oil and gas segment. Last year, we acquired about twenty new customers, primarily in the construction and mechanical engineering sectors. They opt for Van Leeuwen Australia, because we maintain the largest stocks in the region. But also because they know that aside from our own stocks, we can actually supply everything they need thanks to our international network.’

‘Five years ago I started working for Van Leeuwen Indonesia as General Manager. For the past two years I have occupied that position in Malaysia. The importance of the pay-off ‘more than tubes’ was perfectly clear to me from the very beginning. Due to the solid international network, the excellent worldwide stock management, and the logistics and other supplementary services, Van Leeuwen is staying a step ahead of the competition. And this is bearing fruit. In 2014, for example, Van Leeuwen opened a new warehousing site in Malaysia. In part because of this I was recently able to close a deal with a new customer, Kanon Loading Equipment, originally a Dutch company. “Up until the time you contacted us, we did not know that you were also located in Malaysia,” they told us. They liked the fact that we were located there and found it very efficient. They were already aware of our reputation as a reliable and solution-oriented partner. And so the deal went through.’

Furthermore, an added value for customers is the growing cooperation among the various Van Leeuwen locations in Southeast Asia. We increasingly share our knowledge. Recently I was engaged by one of our colleagues in Thailand for a Thai customer with a project in Malaysia. They had already placed an order with Van Leeuwen Thailand, but ran into problems importing steel into Malaysia due to changed regulations. So I proposed the customer to organize all import and logistics in Malaysia. This way we kept the customer, and the customer in turn did not have to look for a new supplier. The customer was happy and so were we.’



More than tubes

Distribution Expertise

Optimal logistics and distribution form the backbone of our service. Van Leeuwen has the in-house expertise required to ensure that materials arrive at the right place at the right time. We provide an efficient and effective flow of goods and all essential related matters, such as documentation, testing and inspection, and just-in-time delivery.

Eric Veraart,
Corporate Supply Chain Manager & QSE

Since the beginning of 2015, Corporate Supply Chain Manager & QSE Eric Veraart has been conducting a critical review of all operational, logistics and IT processes at Van Leeuwen. 'My focus is not only on what we accomplish, but especially on how we do that,' says Veraart. 'That provides new insights that form the basis for a redesign and standardization of our internal processes. Our ambition is an organization that best fits the diversity of our customers and the changes in market demand.'

'Our pipes and components find their way to a wide variety of customers, ranging from new construction projects in the Energy segment, and MRO contracts with local and global organizations to a variety of customers in the Industry market segment,' says Veraart. 'By standardizing our processes, we ensure that our internal processes reinforce one another as much as possible. By combining the strengths of the various branches, we are able to even better and faster meet customer demand. Our MRO customers require fast delivery. Van Leeuwen therefore provides flexible processes and an effective transportation network. Because we are equipped to carry out complex projects, we are also capable of providing added value services, such as performing additional treatments, storing customer-specific stocks and providing smart logistics solutions.'

In 2016, we decided to continue to invest in plant and machinery. Our cutting capacity in Europe is being extended considerably, and by increasing efficiency relating to picking and logistics, we ensure a better time-to-market.

The redesign is taking place as part of the LeeuwOne Project: Leeuwen, Excellence, Efficiency, Uniformized, Way of Working. It is supported by a single IT platform that will first be rolled out in Europe. By working with a single database, a single system and a single multi-location stock, we digitally open up our physical stock, spread across branches, to all sales people, and thus our customers. In the near future, at the push of a button, our sales staff will be able to see which products are available in which warehouses, as well as the status of a delivery. Sales transactions will take place faster and simpler, reducing the risk of mistakes.

The optimal availability and accessibility of our product range must obviously be supported by a smooth operation. Veraart: 'To ensure reliable time-to-market delivery, we are improving our efficiency in the area of treatments, picking and logistics. Process efficiency and quality go hand in hand. A good example of this is the introduction of a supplier portal: suppliers in real-time, via the internet, can reserve their own unloading timeslot in our warehouses. The supplier itself can now determine the time of delivery and the goods are unloaded at the agreed upon time. We have become more flexible and reliable, while at the same time less coordination is required and waiting times have virtually disappeared.'

The process improvements and investments open up the path to modern services. Our customers want to have access to real-time information in the future and be able to conduct a lot of their business electronically. It is our ambition that customers, no matter where in the world, can count on the same high level of service: flexible, reliable and contemporary.'

‘Van Leeuwen opts for advanced IT that makes it possible to develop contemporary services.’

Jochen van Rooij,
IT SAP Functional Application
Manager Logistics



‘We enable our customers to respond fast and efficiently to their own customer orders on the basis of our just-in-time delivery.’

David Gregory,
Operations Manager,
United Kingdom



‘Since 2016, Van Leeuwen has been working on a complete redesign of its IT system. This redesign is aimed at optimally synchronizing customer requirements and internal processes. Because of this ambition, a significant investment was made in SAP S/4 HANA (High Performance ANalytic Appliance), an advanced platform that provides our operations with real-time access via a single database to information about stocks, transactions, deliveries and reports. Through means of this platform we can respond fast and flexibly to market developments, increase delivery reliability and shorten delivery times.


The combination of the newest IT technology and the redesign of processes, ensures that our processes are in line with future developments. All kinds of new services are coming within reach. For example, booking orders via a webshop and the online tracking & tracing of deliveries. Another big advantage is that by reporting from a single system, we can easily compare the performance of the branches, for example in terms of reliability and cost reduction. With these investments in advanced IT, Van Leeuwen can move in any direction when it comes to developing contemporary services.’

‘Van Leeuwen does not just supply pipes. We like to be a crucial link in the customer’s production planning process. We consider it an honor to enable our customers to respond fast and efficiently to their own customer orders on the basis of our just-in-time delivery. For example, Van Leeuwen United Kingdom supplies chromium-plated pipes to a large producer of hydraulic cylinders. We purchase the pipes with the margin on the outside diameter for polishing and chroming specified by the customer.

On the basis of the customer’s production schedules, we cut the various diameters precisely to the required lengths in our warehouse in Brierley Hill. After that, we cooperate with a treatment specialist for further treatment, chroming, polishing, and packaging in special protective packaging materials. We then collect the materials and sort them according to size and length in a dedicated storage area in our warehouse, so that we can quickly pick the requested products for each order placed by the customer.

This means that the customer can order exactly the required quantity of ready-made products from our stock, without the need for maintaining large stocks itself. Furthermore, Van Leeuwen guarantees quality and traceability. Every delivered batch is given a unique identification number in our SAP S/4 HANA system and is traceable to the originally purchased pipes and the corresponding test certificate.’

Customized Services

A middle-aged man with short, light-colored hair and a beard, wearing a grey blazer over a dark blue shirt, is smiling and looking towards the camera. He is standing in an industrial setting with blue machinery and a wooden structure in the background.

‘Our customers want ready-made solutions, so that they can concentrate on their core business. This is precisely what a partnership with Van Leeuwen offers them.’

Nicolas Vancaeyseele,
Sales Manager Industry, Van Leeuwen France





More than tubes

Worldwide Stocks

Our storage capacity comprises 25 warehouses throughout the world, with a total available storage area of 450,000 m² and 150,000 different items in our stock portfolio. Thanks to the excellent cooperation between the various stock locations we can satisfy virtually every demand. Each day, many tons of steel pipes and other materials find their way to customers around the globe. Our strengths include stock management and stock optimization for customers, and customer and project-dedicated stocks.

Menno Groeneveld,
European Assortment Manager,
Van Leeuwen Stainless, Beesd, the Netherlands

Menno Groeneveld has worked for Van Leeuwen Stainless, the 'stainless steel specialist' within the Van Leeuwen Pipe and Tube Group, since 2007. He has developed a special antenna for the erratic stainless steel market. 'In comparison to carbon steel pipes, our products are slow movers; the demand is relatively low and there are rapid price fluctuations. Van Leeuwen Stainless has the knowledge and experience required to make sure the right materials are ready for the customer at the right location, in the right quantity and at the right price.'

'Nowadays customers want to receive their deliveries as fast and complete as possible, at the lowest possible costs,' says Groeneveld. 'Many of our customers have in fact stopped maintaining stocks of their own and expect us, as partner, to maintain sufficient stocks to be able to supply their needs. This trend is observed in all segments, in the mechanical engineering sector, the petrochemical industry, and in the oil and gas segment.'

For us it is therefore key to forecast the supply and sales volumes as accurately as possible. We determine stock levels on the basis of

various parameters, such as customer demand, transportation times and the level of service the delivery is expected to meet. To determine the items to include in our product range, we conduct market research to identify the demand side, as well as the supply side. In principle, we assess customer-dedicated stocks or general stocks the same way. After all, demand always starts with one customer. For example, last year we received a demand for a specific flange product range from a customer in the oil and gas segment. Our market research showed that there were another ten customers or so with an interest in having these flanges delivered to them. As a consequence we were able to offer this customer group favorable pricing and purchase guarantees.

The erratic market conditions are putting the predictability of both the supply and sales volume of our items severely under pressure. This can sometimes make it difficult to continuously offer our customers the right service and availability of materials. Fortunately our team excels in this.

Van Leeuwen is working hard on the one-stock principle: making the different stocks in our European branches available to customers through means of a single database and a single IT system. Stainless steel products generally involve smaller batches and relatively low transportation costs. In the future a webshop and an order tracking system could therefore be of major added value to our customers.'

‘Van Leeuwen flawlessly anticipates fluctuations in market demand and continuously adjusts the product portfolio and stock levels.’

Elodie Marion,
Purchase Manager,
Van Leeuwen France



‘We stay in constant contact with the mills, to acquire a good mutual understanding of market trends and price fluctuations.’

Ivan Poh,
Assistant Purchasing Manager,
Singapore



‘The more you know about a customer, the better able you are to anticipate its demands and needs. This is why we combine a customer-oriented sales strategy with smart stock management. We are able to continuously adjust our product portfolio to the needs of our customers: at any given moment we have the right product at the right stock level.

In addition, we apply our knowledge about the quality, capacity and the operating radius of the mills in our network to provide advice to the sales teams of our customers. Advice that ultimately ends up with the end-customer. Due to the many years of experience within Van Leeuwen we have a perfect sense of the global market and we flawlessly anticipate fluctuations in demand and prices. As a result, we are able to offer our products at a good price, but even more important we can quickly respond to changes in demand.

The combination of global stocks with the specialized knowledge of our European network, ensures that we are able to respond to any request.’

‘A recent project that I am working on is the Block-A Gas Project, the construction of a natural gas processing plant by the energy firm MedcoEnergi in the Indonesian province Atjeh. Under contract to JGC Indonesia, Van Leeuwen supplies the materials for this project. The plant is expected to go into production in the first quarter of 2018. We supply from global Van Leeuwen stocks, as well as directly from the steel mills in the region. Our aim is to supply the materials at the right time, at the right price and with the right specifications. In addition to business contacts, I also invest in personal contact with the customer’s procurement officer. Often this provides me with new insight into the customer’s specific needs and how Van Leeuwen, together with its suppliers, can respond to this. For example, for this project we arranged for the mills to supply precisely the right numbers in each package, thus saving the customer significant repacking and transportation costs.

By listening attentively to customer needs and providing relevant answers, we continuously improve our service delivery. We also stay in constant contact with the mills, to acquire a good mutual understanding of market trends and price fluctuations. This provides us with the insight we need to prepare us for upcoming orders and to prevent a scarcity from occurring in our stocks that could disrupt our daily distribution.’



More than tubes

Customized Services

Van Leeuwen adds value through means of various services, including treatments such as the cutting and bending of materials, as well as coating and chemical cleaning. Such customizations enable customers to immediately incorporate the products into their production processes. Van Leeuwen also takes care of the customer by offering services such as storage and distribution, technical advice, inspections and material testing.

Nicolas Vancaeyseele,
Sales Manager Industry,
Van Leeuwen France

‘Whereas in the past we sold a product, today we come up with a solution.’ This is how Nicolas Vancaeyseele, Sales Manager Industry at Van Leeuwen France (Lyon) sums up Van Leeuwen’s added value for the customer. From laser or plasma cutting to bending work, special packaging or just-in-time delivery within 24 or 48 hours: wherever possible Van Leeuwen makes every effort to as much as possible unburden the customer.

‘Our services go beyond the simple distribution of pipes. We customize components depending on the customer’s request,’ Nicolas Vancaeyseele explains. ‘With its specialized product and service offering, something that a mill or general supplier cannot provide, Van Leeuwen distinguishes itself from the competition. That saves the customer time and money!’

The customer manufactures a component and not only requires just a pipe for this purpose. The customer wants ready-made solutions, so that it can concentrate on its core business. But the customer does not always have the right machines and facilities, and to acquire these facilities represents a huge investment. This is where Van Leeuwen comes into the picture. Our activities vary from the most basic services, such as cutting, up to the most complex treatments, such as mechanical welding.

In our market you will see that many customers start off by assembling components that they purchased left, right and centre themselves. But these customers too expect Van Leeuwen to provide custom solutions. To be able to offer these solutions, Van Leeuwen has entered into a partnership with a former customer, Société Revol Conception sur Acier (SRCA). Thanks to this partnership that dates back to 2006, it is possible to produce highly specific components in small batches. We have also stationed Van Leeuwen France employees at the SRCA site in the French village of Saint-Clair to be able to respond even faster and more effectively to customer needs.

This formula is a big success. An example is Sahgev, a French specialist in the design and manufacture of hydraulic jacks, which is currently experiencing an increase in its operations. Instead of purchasing pipes from us and letting a subcontractor finish them, Sahgev has entrusted us with the complete operation. This way the company is assured that it will receive the pipes correctly cut according to specifications, ready for assembly. In addition, there are regular customers, such as Manitowoc, a leading European manufacturer of telescoping and tower cranes, for whom we manufacture various components that require laser cutting or bending treatments.

All of these treatments add a different dimension to the relationship with the customer. We move from being a supplier to being a partner. A unique relationship of trust is created between Van Leeuwen and the customer and that gives us an edge over competing suppliers.’

‘Due to our knowledge and inventiveness we can also supply highly specialized products.’

Milan Malek,
Commercial Manager,
Van Leeuwen Czech Republic



‘We analyze the customer’s processes and together arrive at the best and cheapest possible solution.’

Steve Vandermeulen,
Commercial Manager,
Van Leeuwen Belgium



‘Our customized services vary from treatments, such as sandblasting, laser cutting and bending pipes up to and including labeling, barcoding and special packaging. We make every effort to be of service to our customers. An example is a customer who asked for a special hollow section made of special high strength steel with a thermally galvanized surface, for one of its customers in the automotive sector. However, the request was for a trial series and there was no guarantee that there would be any follow-up orders. Not a single mill was able to meet this request, because they did not have the required raw materials. We started searching for a solution. We found suitable steel plate coils, and asked a producer to expand its treatment facilities to provide tooling to accommodate special dimensions and tolerances. We supplied this raw material to a mill capable of rolling the special strength steel into a hollow section with the right radius, in accordance with the drawing. Next, at a different location, the pipes were laser cut to size within an extremely precise tolerance. After this the product was returned to Van Leeuwen and after inspection was included in our product portfolio as a semi-finished product. The product, which among others is used for the new Skoda Kodiaq, can now be purchased on a unit basis.

Together with the mills, we spent a year developing this specific product for the customer. This would have been impossible without our extensive knowledge of raw materials, surface treatments and pricing. The process required energy and persistence from our team and our partners. The result gave us a great deal of satisfaction.’

‘When you offer customized services, you put yourself in your customer’s shoes and together you look for solutions,’ says Commercial Manager Steve Vandermeulen. ‘This is happening increasingly more often at Van Leeuwen. Generally, the customer contacts us, and together we produce an excellent piece of co-engineering. For example, together with Case New Holland we searched for an environmentally friendly alternative to pipes treated with Chromium 6. These pipes are used in various applications, including in the brake lines of agricultural vehicles. Together we found an alternative that is less harmful to the environment and just a fraction more expensive.

Often our customers have configured their internal production processes efficiently, but spend a lot of time on special pipe treatments. We like to take on these treatments in such instances. One time we may drill holes at the right place in a pipe, and another time adjust the radius of an angle so that the customer only needs to perform minimal welding work, or we conduct Type 3.2 Certifications. We contribute ideas and visit customers to analyze their processes. This way we come to understand each other better and we work together to arrive at the best and cheapest possible solution. This is how we make the difference at Van Leeuwen.’

Global Sourcing



‘To select exactly the right producer from all steel producers, **requires experience and insight** into large projects.’

(L) **David Sun**, Chief Procurement
and (R) **Dennis Yap**, General Manager, Van Leeuwen China





More than tubes

Global Sourcing

Van Leeuwen has a solid network of suppliers it can call upon for sourcing and procurement. Every year we audit a selection of new and existing suppliers for the purpose of keeping our international Approved Manufacturers List (AML) current and maintaining the quality of our products and services at a high level.

Dennis Yap,
General Manager, Van Leeuwen China

David Sun,
Chief Procurement, Van Leeuwen China

Since its incorporation in 2002, Van Leeuwen China has evolved into a key procurement hub for the entire Group. David Sun, Chief Procurement, Van Leeuwen China in Shanghai: 'We look after the procurement of pipes, fittings and flanges from Chinese manufacturers for our colleague companies throughout the world.'

'For our function as procurement hub it is important to develop a sizeable pool of producers that are commercially interesting and that meet our quality criteria,' Sun explains. 'To qualify, potential suppliers go through an extensive selection process. For example, I visit producers myself and assess them in terms of certifications, working conditions and quality. In addition, we ask external auditors to carry out inspections.' General Manager Dennis Yap adds: 'China is the largest steel producer in the world. To select exactly the right producer from all of these steel producers, requires experience and insight into the projects carried out by our colleagues. The better we are able to do this, the more projects our colleagues are able to acquire.'

According to David, Van Leeuwen China leaves no stone unturned in its search for opportunities that provide the customer with benefit. 'An example is the Tobolsk Project, the construction of an ethylene

plant in Tobolsk by Russia's largest gas processing and petrochemical company SIBUR. Our customer, Linde, asked us for a minimum of three months warehousing for this project, because it is impossible to transport materials to this project site during the winter months. The Chinese producers were unable to accommodate the requested warehousing, while we have a suitable warehouse in Shanghai. This gave us an advantage in comparison to the competition and this is how we won the contract for 3,000 tons of carbon steel seamless pipes and 2,000 tons of stainless steel seamless pipes.'

In 2016, BP's West Nile Delta project was an important project for Van Leeuwen China. David: 'We supplied pipes, as well as fittings there on the basis of a call-off order. We are currently busily working on new projects, for example in Kuwait and Russia. Thanks to our international network of companies, we are able to supply our customers worldwide. For example, we are working for European companies that are building new facilities in Asia and the Middle East. The associated procurement requests come from our colleague Van Leeuwen companies in Europe. Every day we do our best to make sure they are satisfied and to deliver in accordance with the desired specifications and standards.'

Both David and Dennis expect a modest growth for the coming year. 'Oil prices are rising again, although they are still at a low level. This is why in 2017 we will once again work hard to offer our customers added value, among other things by strengthening the partnerships with our key suppliers.'

‘Our global sourcing is one of the driving forces behind Van Leeuwen’s growth.’

Winalyn Litilit Adams,
Procurement Manager,
Dubai



‘With our knowledge of global, specific regulations we contribute to the success of our customers.’

Frank Groeneveld,
QA Manager and Lead Auditor,
Van Leeuwen Precision,
Deventer, the Netherlands



‘Our global procurement enables us to compete for large projects, deliver better quality, deliver faster and offer lower prices. It helps us in determining the procurement strategy when the issues at stake are quality, product specifications and project turnaround times. Global sourcing is one of the driving forces behind Van Leeuwen’s growth. This enables us to offer our customers a great deal: for instance, lower prices, fast on-site deliveries, and availability of the required quality and specifications, anywhere in the world.

From Dubai, together with a colleague, I look after the procurement for all countries within the Arab region. In this respect it is important that we have local branches. Apart from Dubai we also have a presence in Abu Dhabi, Qatar, Saudi Arabia and Oman. Otherwise you cannot compete for local projects. Subsequently it is up to me to close the best deal for our customers.

With global procurement as our strength, Van Leeuwen gives substance to the slogan ‘more than tubes’, because it enables us to expand our procurement process. It provides us with a broader choice of suppliers and that is a competitive advantage. Just like our knowledge sharing; each month all procurement managers worldwide consult with each other in a large telephone conference. Precisely because we share our knowledge we offer more service to our customers in an increasingly further globalizing economy.’

‘Global procurement is not possible without quality assurance. The standards in this area change over time throughout the world. Governments are continuously raising the bar, and industry too demands adherence to increasingly stricter quality criteria. Van Leeuwen distinguishes itself by knowing all relevant standards in this area and by keeping abreast of the changes to these standards. In this respect we keep a careful eye on what specifically applies to our customer. Some customers explicitly ask for certain certificates. Examples that come to mind are compliance with the REACH regulations in Europe, the corporate governance rules of the Dodd-Frank Act (USA), or the ISO 9001:2015.

For me the challenge at all times is to stay one step ahead of our customers in this knowledge area. Van Leeuwen continuously wants to be of the best possible service to our customers and identifying specific regulations is part of this. This enables us to provide added value each time all over again. Customers expect this from us. It is therefore important to have everything in order, internally as well. We are working increasingly more efficiently and we have improved our quality management system. With our knowledge of global, specific regulations we contribute to the success of our customers and maintain our leadership role.’



More than tubes

Project Management

For large projects, Van Leeuwen demonstrates its added value on the basis of its project management skills, whereby we use consulting, knowledge and expertise to ensure that the right products are delivered on time and with the right treatments. If necessary, we will set up dedicated project stocks on-site. Various branches increasingly often work together on large projects throughout the world.

René Viskil,
Project Manager Energy,
Van Leeuwen Zwijndrecht, the Netherlands

'As project manager, I am involved in a project from a to z and I keep myself busy with all of its aspects,' René Viskil, Project Manager at Van Leeuwen Zwijndrecht, tells us. 'This is why I like doing my work as much as I do. It gives me a great deal of satisfaction when we can offer a package of products and services to the customer that is as complete and fitting as possible. In addition to our reliability on all fronts, this is where Van Leeuwen's strength lies.'

'The phrase, "Unfortunately we do not have that or we are unable to do this" does not really occur at Van Leeuwen. Our answer is always the same: we will see how we can make the necessary arrangements. When a customer requires a special product that we do not have in stock, we make the necessary arrangements via our network and make sure that we can supply it. But our supplementary service has no limits either. For example, our customer Air Products, an international company in industrial gases and chemicals, engaged us for the Jazan Project in Saudi Arabia. In Jazan, the state oil company, Saudi Aramco, is constructing a refinery, a maritime terminal and an electrical power plant. Van Leeuwen already was a well-known party to Air Products. Our local branches in the Middle East, experience and a network of mills were decisive in acquiring this project.'

Furthermore, we had a solution for the logistics challenge: the transport by truck from the United Arab Emirates right through the desert to Jazan, including all customs formalities. The organization of a logistics road transport on this scale had never been attempted before in this region. With the efforts of our colleagues in Dubai, a reliable mill and carrier we succeeded in facilitating the entire process from production to on-site delivery. A feat for which we received an 'excellent performance' rating. In the meantime, follow-up orders have been booked.

Van Leeuwen does not trade in a unique product, but manages to create customer loyalty through means of its unique service. We are always up for the challenge and find a fitting solution to any problem. In addition, we develop long-term relationships of trust with customers and realize the value of this. These relations and contacts with customers are used in support of new requests. This enables us to share and apply our experiences to new projects. For the customer it does not matter where he enters into business with Van Leeuwen; the knowledge about his business is present everywhere. The result is a fitting proposal in which we advise the customer how things can be done more efficiently, better and cheaper.'

‘Our strength lies in our ability to anticipate, our flexibility and in our refusal to shrink from any challenge.’

Margaux Nouzille,
Manager Backoffice
and Project Manager,
Van Leeuwen France



‘By means of our project management system, we can provide the customer with a comprehensive overview of the project at any time.’

Henriett Madacsi,
Project Manager,
Van Leeuwen Zwijndrecht,
the Netherlands



‘To succeed in project management you must anticipate and you must be flexible. The customer does not have to adapt to us; we adapt to the customer. Since 2010, we have been supplying custom-made pipes, fittings and components to General Electric and since 2012, we have been doing so under a framework contract. Three years ago we succeeded in moving from being supplier number three to becoming supplier number one, by optimally aligning our services to General Electric’s complex needs.

For example, in the past the project management services were provided from our branch in Le Havre, but General Electric asked us to relocate these services to Meyzieu, close to our logistics department and close to the materials themselves. After receiving training from our project team in Le Havre, Florence Gonin in our logistics department in Meyzieu took over the project implementation role. As a result we are able to serve this customer even more efficiently, and communication runs even more smoothly now. Not only our tight, global network makes Van Leeuwen a strong partner for international projects, but also our reputation that we do not shrink from any challenge. An example is the construction of the fifth LNG storage tank and the associated process installations at the LNG terminal of Fluxys LNG in Zeebrugge, Belgium. Fluxys called on the Spanish engineering firm Duro Felguera for this purpose. The implementation of the project has been entrusted to Van Leeuwen France. This means that the work has to be managed in three countries at the same time. Van Leeuwen knows how to successfully manage complex projects like this.’

‘In the ten years that I have been working for Van Leeuwen, we have grown into a company that, for all projects, small to large, and throughout the world, can offer a comprehensive package. We ensure the same required quality throughout the world in this respect. An example is the RAHC (Rotterdam Advanced Hydro Cracker) project that we have been supplying for the engineering firm Fluor, with ExxonMobil as the end-customer. In the meantime, our project team has prepared more than five thousand order lines to make sure that the materials are delivered at the right time at the right location in accordance with the project specifications established in the Global Agreement with ExxonMobil.

The pipes and components for this project are stored at a dedicated location in our warehouse and are labeled with a color code for each destination, so that the inspection process and loading can proceed fast and efficiently. Due to our close contacts with the suppliers and the use of different tools, such as a detailed project database, we can provide the customer with a comprehensive overview of the project at any time. In addition, we use our stock of semi-finished goods that we treat in our machine shop for this project. Finally, it is reassuring for the customer to know that we are ready 24/7 and work with the customer to contribute ideas in case of changes in the order or destinations, and urgent orders.’

Project Management



‘Van Leeuwen does not trade in a unique product, but we manage to create customer loyalty **with our unique service.**’

René Viskil,
Project Manager Energy, Van Leeuwen Zwijndrecht, the Netherlands



Van Leeuwen in 2016

22
Countries

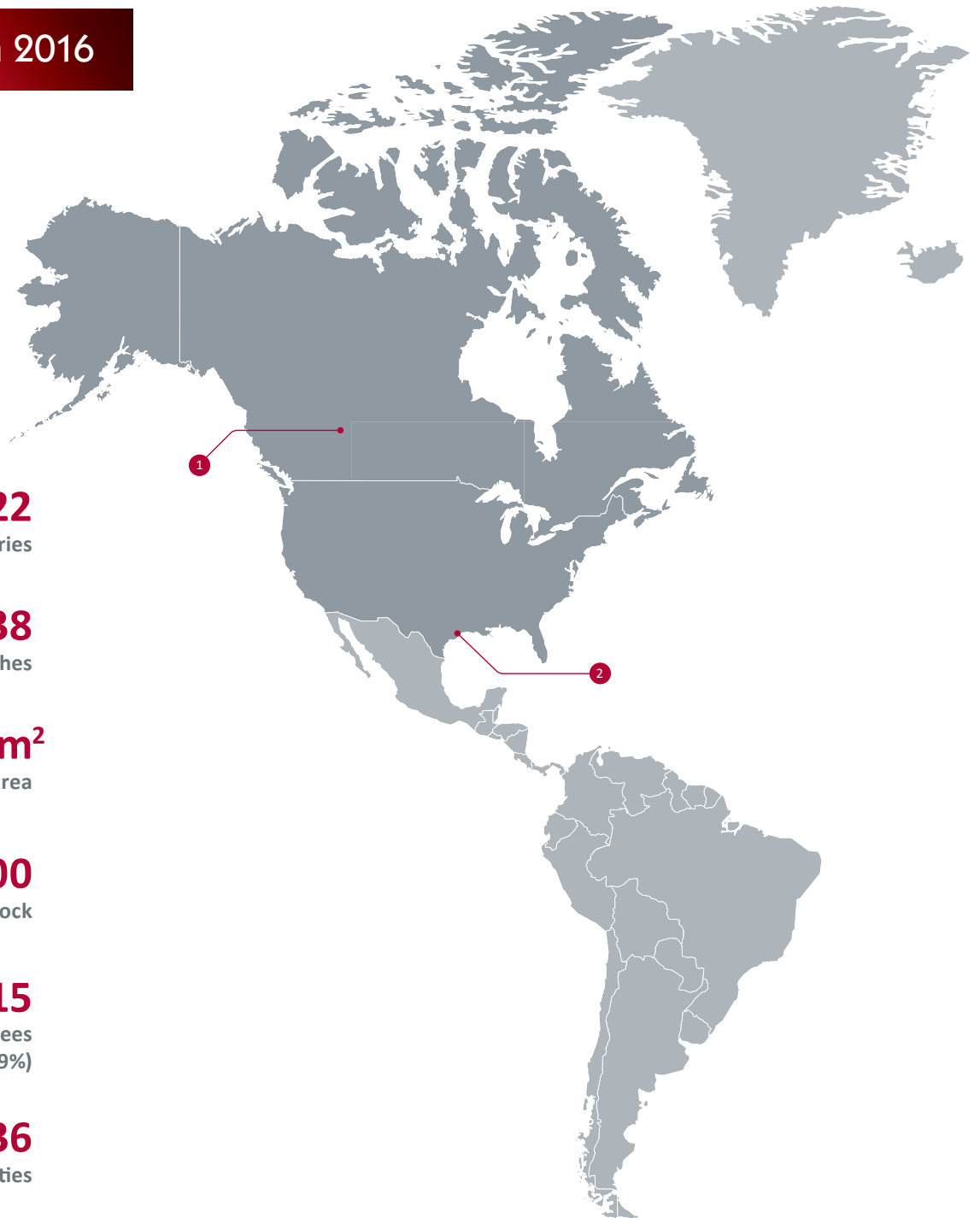
38
Branches

450,000 m²
Available storage area

150,000
Different items in stock

1,115
Employees
(M 71%, F 29%)

36
Nationalities



North America

Canada

1 Edmonton

United States

2 Houston

Europe

The Netherlands

3 Zwijndrecht

4 Deventer

5 Beesd

6 Vianen

Belgium

7 Vilvoorde

8 Brussels

France

9 Paris

10 Le Havre

11 Meyzieu

United Kingdom

12 Brierley Hill

13 Bury

14 Middlesbrough

15 Sheffield

Ireland

16 Tullow

Poland

17 Sosnowiec

Czech Republic

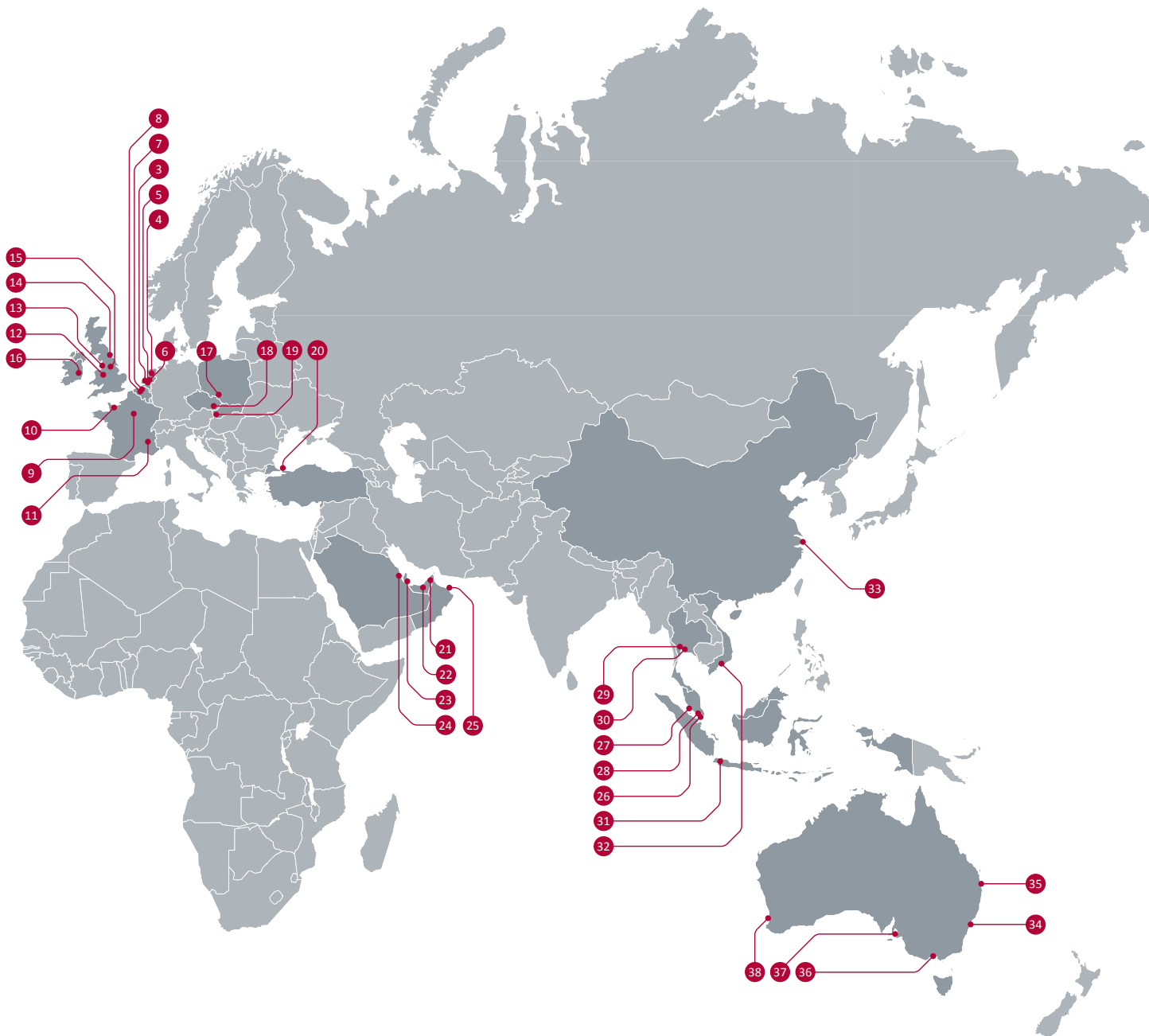
18 Vyškov

Slovakia

19 Trnava

Turkey

20 Istanbul



Middle East

United Arab Emirates
 21 Dubai
 22 Abu Dhabi

Qatar
 23 Doha

Saudi Arabia
 24 Al-Khobar

Oman
 25 Muscat

Asia/Australia

Singapore
 26 Singapore

Malaysia
 27 Kuala Lumpur
 28 Kulai

Thailand
 29 Bangkok
 30 Chonburi

Indonesia
 31 Jakarta

Vietnam
 32 Ho Chi Minh

China
 33 Shanghai

Australia
 34 Sydney
 35 Brisbane
 36 Melbourne
 37 Adelaide
 38 Perth

International network

Head office

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Fax: +32 2 5221972
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Branch: Kulai

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General Manager: D. Yap

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Managing Director: V. Klein

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E-mail: usa@vanleeuwen.com

Personal particulars

Supervisory Board

R. Willems, Chairman

Nationality	: Dutch
Year of birth	: 1945
Previous important positions held	: President Shell Philippines Executive Vice President Shell Chemicals President Shell Nederland B.V. Member Nationaal Comité 200 jaar Koninkrijk
Other supervisory board positions	: Chairman of the Supervisory Board Essent Member Supervisory Board Caldic Chemie Chairman Supervisory Board NLII (Netherlands Investment Institution)
Other positions	: Member Advisory Board Boerhave Museum Chairman STT (Netherlands Study Centre for Technology Trends) Member Advisory Board Responsible Investment PGGM
Appointed	: 01-09-2007

J.C. Breen

Nationality	: Dutch
Year of birth	: 1947
Previous important positions held	: President and CEO Van Leeuwen Pipe and Tube Group B.V. Managing Director Asia Pacific Consumer Electronics Division N.V. Philips
Other supervisory board positions	: Chairman of the Supervisory Board Koninklijke Ahrend N.V. Member Supervisory Board Teijin Aramid B.V. Chairman Supervisory Board Koninklijke Smilde B.V.
Appointed	: 01-09 2007

R.R. Hendriks

Chairman Audit Committee

Nationality	: Dutch
Year of birth	: 1955
Current position	: CFO G-Star Raw C.V.
Previous important positions held	: CFO Fluvia Holding B.V. CEO Aon EMEA (Europe, Middle East and Africa) Vice Chairman Royal VOPAK N.V. Member Management Board and CFO CSM N.V.
Other supervisory board positions	: Chairman of the Supervisory Board of Icepay N.V. Member Supervisory Board Dekker Transport & Tankopslag
Other positions	: Chairman Advisory Board Riverside Holding B.V. Chairman Advisory Board Den Hartogh Logistics Chairman Advisory Board Marcura Equities FZE, Dubai Member Investment Committee of Karmijn Kapitaal, Amsterdam
Appointed	: 01-01-2006



R. Kretzers

Nationality : Dutch
 Year of birth : 1956
 Previous important positions held : EVP Projects Royal Dutch Shell Group
 Member Management Board Shell Nederland B.V.
 Appointed : 15-04-2015

From left to right:
 R. Kretzers,
 J.G. van Oord,
 J.C. Breen,
 C.C.Th. Rietberg,
 R.R. Hendriks,
 R. Willems.

J.G. van Oord

Member Audit Committee

Nationality : Dutch
 Year of birth : 1946
 Previous important positions held : Chairman of the Board of Management Van Oord N.V.
 Other supervisory board positions : Member Supervisory Board Van Oord N.V.
 Chairman Governing Board MerweOord B.V.
 Member Advice Committee Water
 Other positions : Chairman 'Stichting Red een Kind', Zwolle, the Netherlands
 Appointed : 01-01-2009

C.C.Th. Rietberg

Nationality : Dutch
 Year of birth : 1965
 Current position : Medical Specialist
 Appointed : 15-04-2015

Management Board and Executive Committee

P.L. Rietberg, Chairman of the Management Board

Nationality : Dutch
 Year of birth : 1964
 Previous important positions held: Member Board of Executive Directors Van Leeuwen Pipe and Tube Group B.V.
 Managing Director P. van Leeuwen Jr's Buizenhandel B.V.
 Date of commencement : 01-09-1989
 Appointed to current position : 01-09-2007
 Specific areas of responsibility : Strategy, long-term policy, growth and acquisitions; Corporate Communications

J.M. Sassen, Member of the Management Board and CEO

Nationality : Dutch
 Year of birth : 1966
 Previous important positions held: Division Director Precision
 Managing Director Van Leeuwen Precisie B.V.
 Regional Managing Director Van Leeuwen Pipe and Tube (Singapore) Pte Ltd
 Date of commencement : 02-03-1992
 Appointed to current position : 01-09-2007
 Specific areas of responsibility : Operating companies in Europe, Asia and Australia; Operations

S.E. Dijkers, Member of the Executive Committee and CFO

Nationality : Dutch
 Year of birth : 1970
 Previous important positions held: CFO Transmark Holdings N.V.
 CFO & Senior Vice President ContourGlobal
 CFO AES Cartagena
 Date of commencement : 01-09-2016
 Specific areas of responsibility : Finance and ICT

M.A.L.W.J. van Engelen, Member of the Executive Committee

Nationality : Dutch
Year of birth : 1958
Previous important positions held : Managing Director P. van Leeuwen Jr's Buizenhandel B.V.
Manager Human Resources Van Leeuwen Pipe and Tube Group
Date of commencement : 01-01-1998
Appointed to current position : 01-09-2007
Specific areas of responsibility : Operating companies in the Netherlands and Central Europe;
Quality, Safety and Sustainability; Human Resources

J.F. Weerstra, Member of the Executive Committee

Nationality : Dutch
Year of birth : 1970
Previous important positions held : Division Director Energy
Regional Managing Director Van Leeuwen Pipe and Tube (Singapore) Pte Ltd
Date of commencement : 01-01-1999
Appointed to current position : 01-01-2015
Specific areas of responsibility : Operating companies in the United Kingdom, Middle East, and North America;
Global Energy and Procurement



From left to right:
Stefan Dijkers,
Joop Sassen,
Peter Rietberg,
Maureen van Engelen,
Hans Weerstra.

Management

Management Board



Peter Rietberg
Chairman of the
Management Board



Joop Sassen
Member of the
Management Board
and CEO; Chairman
Executive Committee

Executive Committee



Stefan Dijkers
Member of the
Executive Committee;
Chief Financial Officer



Maureen van Engelen
Member of the
Executive Committee
and Managing Director
Van Leeuwen Zwijndrecht



Hans Weerstra
Member of the
Executive Committee



André Dekker
Global Contract Director



Olivier Rosset
Commercial Director
Energy



Henk-Robert ten Cate
Managing Director
Van Leeuwen Stainless
and Combulex



Steven Ruijters
Commercial Director
Van Leeuwen
Zwijndrecht



Johan Meijer
Commercial Director
Van Leeuwen Precisie



Johan de Ruijter
Managing Director
Teuling Staal



Pieter Smaege
Managing Director
Van Leeuwen Buizen
Belgium



Johan Elegheert
Managing Director
Jean Wauters
Belgium



Jérôme Tinel
Managing Director
Van Leeuwen Tubes
France



Kris Bowling
Managing Director
Van Leeuwen
United Kingdom



Hans Zondervan
General Manager
Van Leeuwen Pipe and Tube
Czech Republic, Slovakia
and Poland



Hadi Nassar
Regional General Manager
Van Leeuwen Pipe and Tube
Gulf



Arno Rüf
General Manager
Van Leeuwen Pipe and Tube
Dubai



Mohammad Zaheer
General Manager
Van Leeuwen Pipe and Tube
Saudi Arabia



Jos van de Werff
Regional Managing Director
Van Leeuwen Pipe and Tube
Asia



Ruud Langeveld
General Manager
Van Leeuwen Pipe and Tube
Malaysia



Thijs van Dulm
General Manager
Van Leeuwen Pipe and Tube
Thailand



Pieter Buijs
General Manager
Van Leeuwen Pipe and Tube
Indonesia



Dennis Yap
General Manager
Van Leeuwen Pipe and Tube
China



Moy Houg Jun
Chief Representative,
Van Leeuwen Pipe and Tube
Vietnam



Emmanuel Zammit
Managing Director
Van Leeuwen Pipe and Tube
Australia



Vern Klein
Managing Director
Van Leeuwen Pipe and Tube
Canada



Eline van Haeren
General Counsel



John van Schaijk
Manager Corporate IT



Lysette Haagsma
Manager Business
Applications



Eric Veraart
Corporate Supply Chain
Manager & QSE



Bas van Gelder
Quality, Safety
& Environment



Ingrid den Hartog
Manager Corporate
Communications



Maus Jaarsma
Group Financial
Controller



Koen van Eijnsbergen
Manager Finance
& Administration

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Global Sourcing

Project Management