

VAN LEEUWEN



Annual Book **2021**



The Van Leeuwen Pipe and Tube Group **More than tubes.**

The **Van Leeuwen Pipe and Tube Group** is an international distribution company specializing in steel pipes, and pipe and tube applications. The family-owned company, with its head office in Zwijndrecht, the Netherlands, was founded in 1924 and is active in virtually all industrial sectors.

On the cover, from left to right, three Van Leeuwen Zwijndrecht colleagues:
Stefan Ooms, Logistics employee; Nour-Iddine el Hajjouti, Logistics employee;
Susanne Rönick, Business Unit Manager



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“Customers choose us because our people connect with them, as committed people with a passion for tubes.”



Since its foundation in 1924, Van Leeuwen has always been a people's business. Customers do not choose us merely on the basis of our products and services: they choose us because our people connect with them, as committed people with a passion for tubes. We have a in-depth knowledge and understanding of the significance of our products in the business operations of our customers. We want our customers to excel and to be successful in their business.

Our people apply their entrepreneurship and problem-solving capabilities in their day-to-day work. They make the difference by making use of their expertise and flexibility.

They never say no and always go the extra mile: no matter what may be needed, anywhere in the world and whatever the challenges presented by prevailing market conditions. They assume responsibility for our customers, locally and across borders.

Van Leeuwen people are local entrepreneurs who are proud to form part of a larger whole: the Van Leeuwen family. That makes us the most reliable partner our customers could wish for. As a result, we have a history going back almost one hundred years in time and a future to look forward to with confidence.

Our 2,400 people work in many different countries with a diversity of cultures. We have people from different generations with various talents and skills working in many different jobs, projects, processes and workplaces. It is our pleasure to present a number of our colleagues in this Annual Book. Because, in summary: our people make us 'more than tubes'.

Enjoy reading their stories in this Annual Book 2021.

Peter Rietberg

Chairman of the Management Board

Key figures 2021

(amounts in 1,000 Euro)

	21	20	19	18	17	16
Net revenues	1,430,560	1,177,825	787,669	629,527	612,959	548,904
EBITDA (operating result before depreciation)	93,598	26,797	21,782	18,050	17,530	6,426
EBIT (operating result)	78,873	14,987	17,003	13,548	12,384	1,551
Net result	64,124	9,444	10,064	9,709	6,269	650
Group equity	331,230	252,874	252,078	170,976	163,383	161,622
Group equity as % of total liabilities	40.7	36.8	30.8	43.9	48.6	48.9
Net result as % of average Group equity	22.0	3.7	4.8	5.8	3.9	0.4
Cash flow (net result plus depreciation)	78,849	21,254	14,843	14,211	11,415	5,525
Number of employees at year-end	2,429	2,419	2,619	1,126	1,086	1,115
Breakdown of revenues (%)						
The Netherlands	11.9	12.0	19.6	23.0	21.6	23.3
Rest of Europe	68.8	63.6	37.4	43.1	34.8	36.2
Outside Europe	19.3	24.4	43.0	34.0	43.6	40.5



‘People are the capital of our company.
The interest and commitment are
reflected by colleagues throughout
the company.’

Timo Sostmeier

Van Leeuwen Germany



Company profile

Van Leeuwen. More than tubes.

In almost a hundred years, the family-owned company Van Leeuwen has grown into the world's number one in steel tubes. But we haven't become number one with pipe and tubes alone. Our tubes are not only an end product. They are also the start of our customers' ambition and drive to grow, create and develop sustainably.

At Van Leeuwen, we want to be an essential part of that ambition. By thinking ahead, by standing next to our customers anytime and everywhere and by never saying no. This makes Van Leeuwen the ideal partner for innovative entrepreneurship.

Today, we have local offices as well as local stock of steel tubes and pipe and tube products in 33 countries. From a worldwide network we offer our specialist knowledge of tube applications, tube processing, sourcing, stock planning, project management, logistics and distribution. Supplying all the parts you need to be successful. Any time, any place and any way you require.

But the strongest part that Van Leeuwen has to offer is not made of steel. It is our team of 2,400 proud employees who are locally committed to you worldwide. Connected with loyal suppliers to customers in various segments and markets. With their knowledge and expertise they ensure you of one thing: If Van Leeuwen can't get it done, nobody can.





Our history

Piet van Leeuwen started trading in steel pipes and iron in 1924 in Zwijndrecht, the Netherlands. Thanks to his entrepreneurial pioneering, he expanded his company into a highly successful organization. Almost one hundred years later, Van Leeuwen has grown into a globally operating trading company. The first foreign branch was founded in 1947 in Vilvoorde, Belgium, after which the European network was expanded. In the 1970s and 1980s, global expansion followed with branches in North America, Asia and Australia. In the present century, organic growth and strategic acquisitions have led to new branches and expansions in the Middle East, China and Central Europe. The 2019 acquisition of Benteler Distribution, a division of Benteler International AG, provided Van Leeuwen with access to important new markets in Europe.

Van Leeuwen today

Through our global network, we provide our extensive portfolio of steel pipes, pipe and tube products and specialized services to customers in numerous markets. Ranging from mechanical engineering to pipelines, from civil engineering and construction to the automotive industry, and from the process and energy segment to the hydraulic sector. Our local specialists have extensive knowledge of products and customer applications. This, together with our elaborate international network of suppliers, makes us a strong partner.

Our customers can count on exceptionally large inventories of stocks and an elaborate product portfolio of pipes and tubes. We supply all conceivable steel pipes, hollow sections, fittings, flanges and bar steel of any desired quality and standard, in carbon steel as well as stainless and alloyed steel. Our custom material treatments among others include: single or multi-step treatments, such as sawing, cutting, deburring, punching, bending, roughing or deforming; protecting the interior or exterior of pipes and tubes with various coatings, zinc, cement or chrome. We provide inspections and material testing, custom packaging, markings, documentation, customer-dedicated storage and express deliveries. In addition, we specialize in project management: our teams, specifically composed for each project, manage the distribution chain for projects worldwide. We devote constant attention to all requirements relating to quality, safety and sustainability.

As a family business we are proud of our almost one hundred years of existence. Our long history is one of the strongest building blocks of our company. We have developed our pipes and tubes specialism and our extensive network over many years. On the basis of this global network, our more than 2,400 committed and driven employees devote their efforts to the customer, inspired by the pipe and tube profession and everything related to this: the pipe and tube products, services, processing, and the pipes and tubes that find their way into such a wide range of applications. This inspiration gives Van Leeuwen its strength and ensures we are top of mind for many customers.

Markets

Van Leeuwen supplies its products and services to a highly diverse range of markets and customers. Our local specialists have extensive knowledge of products and customer applications, and this, together with our elaborate international network of suppliers, make us a strong partner. We cooperate internationally to help customers advance locally and to ensure they can do their work better and faster. By cooperating intensively with our customers, we know what they need and provide them with the best solutions with the greatest added value.



Mechanical Engineering

Our products are incorporated into various machines, such as **cranes, agricultural and excavating machinery, transportation equipment, and lifting and hoisting equipment**. Our customers in the mechanical engineering sector rely on our elaborate, high quality product portfolio, which includes seamless heavy wall pipes, machine engineering steel, welded pipes, hollow sections, bar steel, fittings and flanges. We also provide custom treatment services, such as cutting, coating and laser cutting. We perform testing, organize inspections, and offer a wide range of logistics services, such as packaging and customer-dedicated stocks. This enables customers to very quickly integrate the pipe and tube products into their processes.



Civil Engineering & Construction

The civil engineering and steel construction market is highly diverse and includes customers involved in various sectors, such as the construction of **ships, bridges, road sign gantries, station roofs and shopping centers, sports stadiums, greenhouses, balconies and furniture**. Here too our product portfolio is highly suitable and diverse and includes welded and seamless round pipes, hot and cold-formed hollow sections, and welded pipes with associated fittings and flanges for technical applications (water, gas, steam). We supplement this with custom services such as straight and diagonal cutting, shot-blasting and red-leading, galvanizing and swaging. Our digital services, such as our webshops, further contribute to optimizing the services we provide to our customers. Our PreFiS press fitting system is a perfect solution for sprinkler systems. With our extensive stocks, held at strategic locations throughout the world, our products are virtually always available with short delivery times.



Automotive

Customers in the automotive segment produce or supply to producers of **cars, trucks, buses and motorcycles**. This segment is characterized by its high quality criteria and optimal management of the distribution chain. We supply products such as hollow sections, and welded and seamless pipes that generally are custom made using various specific treatments. To perfectly model the pipes, we regularly perform various treatments consecutively, one directly after the other. This is known as multi-step processing. For example, we can cut the pipes and then bevel the ends, or we can deform the pipes and then drill holes. We also offer additional services in this segment, such as technical advice, quality control, and co-engineering.

‘By cooperating intensively with our customers, we know what they need and provide them with the best solutions with the greatest added value.’

Hydraulics

Pipes, bar steel and components are generally used for the production of **hydraulic cylinders**. These cylinders are incorporated into various, often complex machines, implements and systems. We also supply producers of hydraulic cylinders with various products, such as hydraulic pipes, cylinder pipes and bar steel in various versions and qualities, such as welded and seamless, cold-drawn and hot-rolled, hard chrome-plated and stainless. The treatments we can provide include honing, drilling and chroming.



Process & Power


Customers in the Process segment focus on processing natural raw materials, such as oil, gas and wood into semi-finished and end-products. Our products are applied in industries, such as the **petrochemical, chemical, food, pharmaceutical and paper industries, and in water treatment and waste processing plants**. The Power segment focuses on **power generation** such as thermal and renewable energy. Our product range is varied and includes seamless and welded pipes and tubes, fittings, flanges and elbows. Van Leeuwen provides its customers with full-service solutions that include project management, global procurement, project-dedicated storage facilities, shipping and 24/7 deliveries.



Pipelines

Pipelines are installed for the **transport of liquids and gases across long distances**. This segment is characterized by the high volumes of pipes and bends, high quality criteria and intensive inspections. The treatments we frequently apply to pipeline-related products include interior and exterior polypropylene or epoxy coatings, for example. The ability to efficiently organize logistics solutions, such as temporary storage facilities and large-scale transport, is also of importance in this segment. Van Leeuwen has the in-house expertise needed to meet all of the requirements of customers in this segment.



A close-up, artistic photograph of a bicycle frame, showing the intricate metal tubing and joints. The lighting is soft, highlighting the metallic textures. A semi-transparent blue rectangular box is overlaid on the lower portion of the image, containing white text.

'I consider the international aspect of my job to be a major plus. I work closely together with colleagues throughout Europe and am given the opportunity of working at different locations in Europe.'

Emelia Hjortenholt

Van Leeuwen Buizen Group Head Office, Zwijndrecht, the Netherlands





The Van Leeuwen Pipe and Tube Group ended 2021 with record sales and net profit figures. After 2020, which was characterized by the integration of a major acquisition, as well as the impact of the corona pandemic, economic conditions at the beginning of 2021 were more favorable than expected. The economy recovered, resulting in an increase in market demand. Major material shortages and a disrupted supply chain resulted in unprecedented price increases worldwide.

With its strong international stock position and sourcing knowledge, Van Leeuwen managed to effectively respond to developments. With a great deal of effort, resourcefulness and the use of its international network, Van Leeuwen was able to provide its customers with the materials they needed. The company benefited from the extra strength it gained through the acquisition of Benteler Distribution at the end of 2019.

The total revenues of the Van Leeuwen Pipe and Tube Group amounted to € 1,431 million in 2021 (2020: € 1,178 million). The operating result amounted to € 79 million (2020: € 15 million) and the net result was € 64 million (2020: € 9.4 million). Solvency has improved significantly to 40.7% (2020: 36.8%).

Worldwide market conditions and trends

Price levels and stocks

At the beginning of 2021, the market was unexpectedly confronted with unprecedented price increases. Nothing in 2020 had pointed to this development. At the end of 2020, the global economy continued to be considerably negatively affected by the corona pandemic without any clear signs of economic recovery. The business community throughout the world had adopted a wait-and-see attitude and investments were on hold. Van Leeuwen too took account of these market conditions and the associated conservative forecasts. After the 2020 lockdowns the market, however, experienced an unexpectedly rapid recovery. The economy restarted in shocks of such magnitude that it created shortages of materials and major disruptions in the supply chains worldwide. Iron ore prices increased rapidly, resulting in sharp increases in the price of coils, a pre-material for welded pipes. Prices charged by our suppliers, as well as delivery times increased very rapidly.

By the end of January 2021, the market situation was unlike anything we had seen for the past fifteen years. Many parties were diligently looking for materials and allocations from suppliers; prices and delivery times shot through the roof. This development not only occurred in the steel industry, it affected raw materials in general. In the second quarter it became clear that this increase in prices and delivery times was going to persist throughout 2021. This was partly due to the Chinese government's decision to introduce an export tax on steel and due to various safeguard measures implemented by the European Union.

After the summer of 2021, shortages became smaller and the prices of raw materials, such as iron ore, began to decline. This resulted in a limited price decrease for welded pipes. However, the very rapidly rising energy prices once again put strong upward pressure on prices, in particular for seamless pipes. At year-end 2021, this situation remained virtually unchanged. Although the supply chain stabilized somewhat, prices remain high and there is no immediate expectation of a strong decline. At year-end 2021, our average selling prices were over 30% higher than the 2020 forecast.

From the start of 2021, mounting delivery times and the limited availability of materials from our suppliers presented us with major challenges and issues. In 2020, we had consciously aligned our stock levels with the expected limited demand. With the unexpected favorable development of market demand at the beginning of 2021, it was important to bring stocks back up to higher levels. However, this proved to be virtually impossible due to the limited capacity of our suppliers as a result of material shortages and significantly increasing delivery times.

With major effort we managed to keep the replenishment of our stocks in line with sales. Our globally well-developed sourcing network and our excellent long-term relationships with permanent and reliable suppliers were decisive in this respect. This enabled Van Leeuwen to respond as effectively as possible to the constantly changing conditions. We not only managed to effectively supplement and balance our stock portfolio, we were consequently also able to supply our large group of permanent customers with the right materials on time, thus enabling them to continue production.

This was not a simple task, but a complex puzzle for our international group of procurement and stock managers. We succeeded in accomplishing this thanks to their efforts and with the support of our suppliers. Our company, which doubled in size in 2020 and thereby also doubled the size of its network, was able to operate even more decisively. As a result of the acquisition of Benteler Distribution at the end of 2019 we now have a larger network with more stock-keeping locations supported by well-developed systems and business processes. This has improved our global footprint, and we now have more in-house knowledge and expertise. By the beginning of the fourth quarter, we had brought our worldwide stocks back up to appropriate levels.

Market demand and market conditions

Market demand, particularly in the industry segment, was good throughout 2021. Following the lockdowns in 2020, demand had already noticeably recovered by the end of 2020. This situation was carried forward into the beginning of 2021 and evolved much more favorably than originally thought, exceeding targets by about 10%. This improvement brought things back to pre-2020 levels. This was clearly visible in the automotive segment, but especially also in the mechanical engineering, civil engineering and construction markets throughout Europe. Order intake clearly grew. The order book grew considerably, particularly in our branches in Northern Europe, Central Europe and Switzerland. This resulted in bottlenecks in terms of the availability and supply of pipes and tubes.

As a result of global supply chain disruptions, material shortages and the associated mounting delivery times, supplying our customers with materials on time often turned into a complex undertaking. This was especially true for our customers with fixed purchasing contracts and delivery schedules and this required major effort on the part of everyone involved. We were able to continue to provide customers with the needed materials from our strong stock positions. Market demand continued to be equally strong



throughout all of 2021. Customers in the automotive segment in particular were confronted with stagnating production due to the shortage of microchips and semiconductors, as a result of which delivery programs were regularly suspended. Towards the end of 2021, a number of our customer groups was once again faced with a decrease in production as a result of new corona lockdowns and a shortage of employees. This caused volumes to decline somewhat.

Prices continued to increase throughout the year, initially for welded pipes, but later in the year for seamless pipes as well. Stainless steel and alloyed steel prices also continued to increase. Van Leeuwen was forced to pass on these price increases to the market, especially because the scarcity of materials was rapidly increasing and stocks had to be replenished at significantly higher prices, assuming materials were available at all. Particularly due to the rapid price increases at the very beginning of the year, absorbing these prices was difficult for many of our customers. It was an issue that demanded the necessary resourcefulness and solution-oriented actions from our commercial teams throughout the world. Our people created solutions and based on their excellent relationship with our customers managed to make suitable arrangements in virtually all instances.

Throughout all of 2021, the situation in our energy markets was considerably less favorable for deliveries from stock as well as for projects. Developments in this market have been stagnating for several years. The energy transition is causing changes and uncertainties about the future. As a result, large projects involving fossil fuels in particular have disappeared, in the upstream, as well as downstream segments. A key development is the production of blue and green hydrogen, as well as synthetic fuels. A number of our customers is working on initial projects in this area. In close cooperation with these customers, we are monitoring developments and are responding to the adjusted material specifications.

A significant volume was nevertheless realized in the energy segment throughout the year involving the delivery of materials for projects acquired in previous years. We acquired a number of

medium-sized projects over the course of the year. Our branches in the Gulf region were confronted with a very weak market. However, towards the end of the year, demand in the energy market in Asia and North America improved and we were able to further fill our order book.

Our branch in Australia performed very well, despite the tremendous difficulties experienced by our teams in replenishing stocks. The availability of transportation from Asia to Australia was extremely limited and problematic in terms of getting and keeping stock levels up to par. The consequences of the corona lockdowns were extremely drastic through almost the entire year, whereby our people, as well as customers worked from home and traveling was impossible. In spite of all this, the team managed to achieve a record result.

Corona pandemic

In 2021, we continued to be confronted with the corona pandemic in many respects. While the consequences were less drastic than they were in the previous year, many aspects were nevertheless present. Naturally, our attention first and foremost focused on the health and safety of our employees. Aside from this, we devoted effort to ensuring that business operations could proceed as effectively as possible. As a result of increased absence due to illness and quarantine measures, we were regularly confronted with occupancy problems in our warehouses and production facilities. This caused our delivery reliability regularly to be under pressure. By making the necessary effort and incurring additional costs, we were able to minimize the impact on our customers.

In contrast to 2020, the lockdowns virtually had no impact on market demand. In fact, demand was stronger than it was in previous years, which made keeping personnel levels up to par even more urgent. Up until the summer holidays, we had employees work from home either fulltime or part-time in almost all countries and travel, domestically or internationally, was either impossible or severely restricted. Not an ideal situation for a company that is highly dependent on human

contact. Despite the tremendously improved digital contact facilities, looking for solutions, improving processes and coming up with innovations works best when people can work together as a team and can inspire each other. The restricted travel possibilities also had a hindering effect. Visiting customers and suppliers was not possible, nor were they able to come visit us. Establishing mutual contact between various country teams and management visits also became more difficult. Following the summer, travel restrictions were lifted to some degree and mutual visits resulted in much positive energy and new ideas. Unfortunately, lockdowns and restrictions were once again imposed starting in November. Regrettably, we were unable to hold our November annual international management meeting for the second year in a row.





Financial results

The consolidated net revenues of the Van Leeuwen Pipe and Tube Group amounted to € 1,431 million, an increase of 21% compared to the previous year (2020: € 1,178 million). This growth is partly due to an increase in the delivered tonnage, which grew by 5% to 699,000 metric tons (2020: 666,000 metric tons). On the other hand, this is due to an increase of 16% in the average sales price to € 2,047 per metric ton. The Industry segment contributed 73% to total sales (2020: 69%), while the Energy segment contributed 27% (2020: 31%).

The operating result improved considerably, amounting to € 78.9 million (2020: € 15 million). Three key factors underly this improvement: first, the substantial growth in volume; second, improved trading margins and finally a shift in product mix, as well as between market segments.

Total operating costs also increased and amounted to € 1,352 million (2020: € 1,163 million). The key reasons for this are the increased costs of finished product combined with higher volumes, and the costs of absence due to illness, primarily caused by the corona pandemic. Increased machine and energy costs also played a role. Finally, depreciation charges increased due to the investments made in recent years in warehouses and machines to strengthen our logistics network and treatment facilities.

The financial income and expenses decreased by € 0.9 million (29%), primarily due to an improved liquid asset and bank debt structure. The tax expense amounted to € 14.3 million, which resulted in an effective tax rate of 18.6%. This represents a decrease in comparison to 2021 due to the higher valuation of carry forward losses.

The result from participating interests amounted to € 1.7 million (2020: € 1.0 million) and relates to our 50% participating interest in Polarputki, a leading pipe and tube distributor in Finland.

The strong operating result and the lower financial expenses resulted in a net result of € 64.1 million in 2021 (2020: € 9.4 million).

The higher prices and increased volumes had a substantial effect on operating working capital. The operating working capital amounted to € 359 million at year-end 2021 (2020: € 262 million). The inventory increased by € 109 million to € 346 million (2020: € 237 million) and trade accounts receivable increased by € 56 million, partially offset by an increase in trade accounts payable of € 69 million.

The net cash position was € 8 million (2020: € 22 million). Group equity amounted to € 331 million (2020: € 253 million). Solvency increased to 40.7% (2020: 36.8%).

The Van Leeuwen Pipe and Tube Group's cash position and bank facilities are sufficient to meet financing requirements.

Debts to credit institutions amounted to € 20 million (2020: € 59 million) and decreased due to repayments.

In 2021 there was another release of negative goodwill with a net effect of € 10.0 million. This negative goodwill was created in 2019 due to the acquisition of Benteler Distribution. Of this amount € 7.3 million is related to the costs of integration and € 2.7 million to the amortization of negative goodwill.

Developments within the organization

Investments in operations

Optimal logistics and operations are essential for us to be able to realize our promises to our customers. Our logistics activities can be grouped into three main functions. Distribution from stock is one of these main functions. Here we make a distinction between sales from freely available stocks and sales from dedicated customer stocks. An optimized network of stock-keeping locations with a broad product portfolio and the mutual exchange of stocks gives us a powerful position in the market.

A second function is the custom treatment of pipes and pipe and tube products: ranging from cutting, shot-blasting and red-leading to bending, drilling and deforming pipes and tubes using a robot-supported multi-step treatment process. In Europe we have over 360 machines, including more than 230 saws, that enable us to provide virtually any custom treatment.

The third function concerns projects. Products then go directly from the mill to the construction site. However, often they are also shipped from our project stocks in our warehouses, where the order streams are consolidated, and where products are regularly subjected to minor treatments.

In 2021, we invested in multiple branches in order to further improve service from stock to our customers and to further optimize production and processing. Many of these investments are related to the integration of logistics and operations following the acquisition made at the end of 2019. Under the banner OneHalmstad, our Heléns branch in Sweden devoted its efforts to consolidating all activities at a single location. A 5,000 m² warehouse was constructed in Halmstad where all storage and production activities can be brought together.

A great deal of effort has been put into this large project and the associated moves. Once completed over the course of 2022, all logistics activities will take place from a single warehouse. Following on to this project, work on building a new regional head office for Northern Europe will be started.

In the fourth quarter of 2021, we started working on expanding the warehouse in Vyškov in the Czech Republic. This 5,000 m² expansion will include a honeycomb system that will provide for a faster and more efficient logistics process. As a result, the storage and stock-keeping locations in Central Europe will also be more efficiently aligned, which will make further sales growth possible. In addition, we could close the warehouse in Vienna, Austria due to the centralization of stocks in branches in Germany and Central Europe.

A study will be conducted into the further optimization and coordination of our stock-keeping locations in the Benelux and Germany. This will include a review of the capacity of the central warehouse in Duisburg and we will be investing in an advanced monorail system in the central warehouse in Zwijndrecht, the Netherlands. The hypermodern warehouse of our Swiss company Kindlimann in Tobel-Tägerschen as opened in 2020, in many respects is a guideline and example for these projects.

IT developments

A state-of-the-art ERP system is essential for integrally managing our business processes. In 2021, under the 1Leeuwen project banner, we began redesigning our ERP system on the basis of our existing SAP systems. The objective of this project is to create a single integrated system for managing all of our business processes within the SAP S/4 HANA environment. Some of our companies already make use of S/4 HANA, while others are still using SAP ECC. A team of specialized Business Architects and SAP Consultants is working on further implementing this system to optimally manage our supply chain, and commercial and financial organization. In 2022, the branches in the United Kingdom will be switched over to the new S/4 HANA system, after which the system will be further rolled out over the coming years.

At Van Leeuwen we make use of multiple platforms that enable us to communicate with all parties in the supply chain through means of automated messaging. This enables us to receive customer orders, send out confirmations, supply delivery information in real time, as well as make certificates and invoices available. In 2021, additional investments were made in EDI connections with our customers, suppliers and carriers.





Our aim is to increasingly further implement digital integration with our permanent partners. In a number of branches, work was successfully started on automatically converting e-mails received from our customers into orders in the SAP system (using OCR, optical character recognition). The use of these digital connections means less paperwork, a reduced chance of errors and faster data processing times.

In December 2019, a large-scale IT project was initiated with the objective of shutting down, replacing or migrating the systems from the acquired Benteler Distribution company with or to Van Leeuwen's hardware and software environment, connecting branches to our network and replacing telephone exchanges. This IT project was successfully completed in mid-2021. Over a period of eighteen months a total of more than 80 centralized systems, 1,300 workstations and 50 branches were converted, a large project that did not cause any disruptions to business operations.

Cybersecurity has our constant attention. In 2021, we further upgraded our cybersecurity. Furthermore, a large number of security protocols was tested and improved, and we regularly train and inform our employees about cybersecure behavior.

Quality, safety and sustainability

Our customers are confronted with increasingly stricter requirements relating to quality, safety and sustainability. These are areas to which Van Leeuwen devotes constant attention as well. Every year we set high quality standards for ourselves that are translated into objectives. We regularly monitor progress on the basis of Key Performance Indicators (KPIs) and internal audits. Our Approved Manufacturers List (AML) only contains suppliers that are approved by Van Leeuwen following a strict selection process.

Quality awareness has a long history at Van Leeuwen. We have been working in accordance with ISO standards for tens of years. The ISO 9001 standard and the associated certificate form the basis of our quality policy. In 2021, we started integrating the quality system used by Van Leeuwen branches with the quality system used by the branches of the former Benteler Distribution

company. Both quality systems will be merged into a single ISO 9001-compliant system in the first quarter of 2022. With regard to sustainability and an energy-conscious approach to work, we adhere to the international OECD guidelines and act in accordance with the ISO 14001:2015 standard. Branches focused on the automotive sector are IATF 16949 certified.

We pursue an active ISO 45001:2018-compliant safety policy. We devote constant attention to the health and safety of all of our employees. A series of group procedures supports the Group's safety system. Safety campaigns were conducted in 2021, to reinforce the safety focus and to further improve safety awareness. The number of accidents resulting in absence from work decreased by 17%. While this is a positive development, we continue to aim for a further decrease.

Van Leeuwen assumes responsibility for carrying out its business operations and growth plans in sustainable ways with respect for the environment. This policy is set out in the Van Leeuwen Code of Conduct, as well as in internal policy documents pertaining to Health, Safety and the Environment. The concern for our climate, the environment and society is self-evident for Van Leeuwen. Continuity is a guideline for us as a family business. We feel responsible for the next generation, within as well as beyond the company. This past year, we started working on formulating our sustainability objectives. In 2022, we will work these out in further detail and make them measurable, with due consideration to the entire value chain from mill to customer. These objectives in part concern energy consumption and renewable energy, and safety, diversity and inclusion at the workplace.

Together with a number of prominent suppliers we are investigating the possibilities of keeping pipes in stock that are produced with a reduced CO₂ footprint. A key aspect in this regard is to jointly explore with our customers where these 'green pipes' can be applied and how the extra costs will be distributed within the chain.

As a leading distribution company, in the future we also aim to devote greater attention to making distribution greener. Transportation by rail or water instead of by road, stocks kept closer to the customer, and, for example, one-time delivery

using fuller trucks instead of frequent deliveries with trucks that are only half full. At the end of 2021, our company in the Netherlands initiated a pilot to supply our customers via a bio-diesel fueled truck. We expect to further roll out this program in the future.

The SwinSolar project was also initiated at the end of 2021. A solar photovoltaic installation will be installed on the roof of our warehouse in Zwijndrecht, the Netherlands. This installation is expected to be put into operation over the course of 2022. The installation will have a 5 megawatt peak capacity, which provides for all of our own electricity needs throughout the Netherlands and in addition, enables us to return sufficient power to the grid to meet the electricity needs of over 1,300 households. A number of smaller solar initiatives has also been started up elsewhere in Europe.

Organization and people

To achieve our strategic goals and to continue to be a leading, trendsetting specialist in steel pipes and tubes, we rely on a large team of skilled and motivated professionals. We currently are and will continue using our People Strategy over the coming years to work on having sufficient numbers of well-trained employees, the strategy of our company, standardizing our work processes and creating pride and job satisfaction for our people. We aim to be an attractive employer, now and in the future.

Our presence in 33 countries, with 75 branches and 58 different nationalities, illustrates our international scope. The Van Leeuwen Pipe and Tube Group's total workforce currently consists of 2,429 employees (2020: 2,419). Women comprise 30% of the total workforce, men comprise 70%.

Our people play an essential role in providing service to our customers. Many of our employees have acquired a wealth of experience and knowledge, often through long-term employment. Transferring this knowledge to new colleagues and combining existing knowledge with new experience are important processes. During the post-acquisition integration we noted that combining knowledge from two organizations often leads to very powerful new organization structures.

In support of all of this and to build a strong HR organization structure for the future, we implemented the Workday program in virtually the entire organization in 2021. This enables us to provide our employees with even better HR support and to work on further strengthening our organization through means of education, training and performance management. Our global organization offers many opportunities for talented employees to develop themselves. We continue to develop this talent through, for example, a monthly 'CEO corner talk' and through international exchanges.

In 2021, our employees were once again regularly required to work from home as a result of the corona measures.





We consider contact with colleagues and the exchange of knowledge and experience essential. We therefore look forward to a more relaxed situation with fewer restrictions in the near future.

On the other hand, we believe that working from home on a limited scale can contribute to enriching the work-life balance. We are working on a pilot to determine the optimal situation in this respect.

As employer, Van Leeuwen offers its people equal opportunities. The Management Board and the Executive Board actively promote balanced gender and cultural diversity within the various operating companies.

Compliance

Conducting business fairly and transparently is a high priority for Van Leeuwen. Laws and regulations, such as competition, corruption and privacy legislation, international sanctions, and import and other constraining measures: all applicable regulations are closely monitored, evaluated and applied within the organization. Internal procedures, training and auditing are key areas for attention in this respect. To ensure we comply with the increasingly more complicated regulations, we appointed a Head of Compliance at the beginning of 2022. This person will be supported by a network of compliance officers in the various countries in which we operate.

In 2022, we will devote specific attention to the speak up policy, whereby we offer our employees and stakeholders the opportunity of reporting concerns and possible wrongdoings in a safe environment without becoming a victim of reprisals, in accordance with the EU guideline concerning whistleblowers. We are taking various measures to further limit the risk of bribery and conflict of interest, and organize training sessions to promote awareness among our employees.

Our Code of Conduct clearly sets out our principles relating to the attitude and behavior of our employees. This information is provided to each employee on joining the company. Last year, no code of conduct incidents were received by the Code of Conduct Compliance Committee.

Strategic developments

In 2020, we developed our new strategic agenda, 'Van Leeuwen 4.0'. As the number one pipe and tube specialist in the world it is our aim to focus on creating better value for our customers. On the basis of our broad offer of pipes and pipe and tube products from our global network, but especially through means of the knowledge of our professionals, we fulfil our promise of offering 'more than tubes'. We are constantly looking for solutions that address customer issues: in the area of logistics planning, stock management and processing, as well as innovative concepts that enable our customers to optimally and efficiently produce their products.

Our strong European distribution organization and our global footprint are great strengths. To ensure the optimal operation of this international distribution network, it is important for us to constantly improve our business processes. Our ERP systems are supportive in this respect. We are increasingly focusing on using digital means to integrate our processes with those of our customers and suppliers. We also invest in advanced processing machines and in robotizing the production process.

Knowledge is decisive in all of this. Our people always are the determining factor in the growth and success of our company. Changes in the market, new systems and other business processes also demand other skills and knowledge of our employees. This is why we continue to invest in further developing our people and in developing their talents. We do this through training and education, recruiting, and by attracting and retaining our employees.

In 2021, a group of 250 managers took steps in implementing the 'Van Leeuwen 4.0' strategic agenda. A considerable number of projects and initiatives focused on creating additional value for customers and the integration of business processes has been initiated.

Outlook

In 2021, under exceptional market conditions, result as well as sales records were broken and new milestones were reached. At the beginning of 2022, the outlook is once again favorable, but a number of factors remains uncertain. The corona pandemic for the most part appears to be past; however, in the first quarter we continue to be confronted with loss of productivity as a result of high levels of absence due to illness because of corona infections.

The invasion of Ukraine by Russia is a very severe event. It is still unclear how this will affect the economy and our markets. Our attention is first and foremost focused on our employees in our Ukrainian branch in Lviv and on their families. We have temporarily halted our operations there so that our people can provide for their personal safety and that of their families.

It is expected that the financial consequences for our company will be relatively limited, given the small scope of our activities there. Naturally, the trade sanctions imposed on Russia and Belarus also impact our sales, as well as procurement activities. In particular, it is not clear what the impact will be over the long term on the availability of materials, market demand, inflation and economic development. Most importantly, a speedy end to the war is our biggest wish for humanitarian reasons. This would also bring greater clarity about and stability in the future. These unexpected developments in the

first quarter of 2022, with a high lack of clarity about its due course, make it difficult to provide a good prognosis for the remainder of the year.

As a family business with a history dating back almost one hundred years, we know very well how to deal with uncertain and changing market conditions to ensure the continuity of our company. For almost one hundred years we have been guided by our inspiration for pipes and tubes. Everything in our business operations is focused on delivering our pipe and tube products to our customers – according to specifications, on time and in the right quantities with expert advice – such that they can be immediately incorporated into their production processes. Customers can count on a reliable partner. We especially rely on our global teams, people who are committed and who dedicate all of their efforts to giving our customers top priority on a daily basis.

Zwijndrecht, the Netherlands, 6 April 2022

Management Board

P.L. Rietberg (Chairman)

J.M. Sassen







'Once they have joined the company, employees are not likely to leave. Understandable, because here they are given every opportunity to grow.'

Boris Guedel

Van Leeuwen France

Results 2021

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

Consolidated profit and loss account

(amounts x 1,000 Euro)

	2021	2020
Net revenues	1,430,560	1,177,825
Cost of finished goods	-1,120,625	-946,425
Wages and salaries	-132,691	-119,170
Social security charges	-26,703	-24,584
Depreciation and amortization	-14,725	-11,810
Other operating expenses	-56,943	-60,849
Total of operating expenses	-1,351,687	-1,162,838
Operating result	78,873	14,987
Interest income	79	132
Interest charges	-2,310	-3,293
Net financial income and expenses	-2,231	-3,161
Total of result before tax	76,642	11,826
Income tax expense	-14,270	-3,399
Share in result from participating interests	1,752	1,017
Net result after taxes	64,124	9,444

- Consolidated net sales increased due to an increase in the delivered tonnage combined with an increase in the average sales price per metric ton.
- The cost of sales is in line with the increase in sales, with the growth in tonnage and higher prices as underlying factors as well.
- Personnel expenses primarily increased due to the additional deployment of personnel to compensate for absence caused by the coronavirus.

Consolidated balance sheet

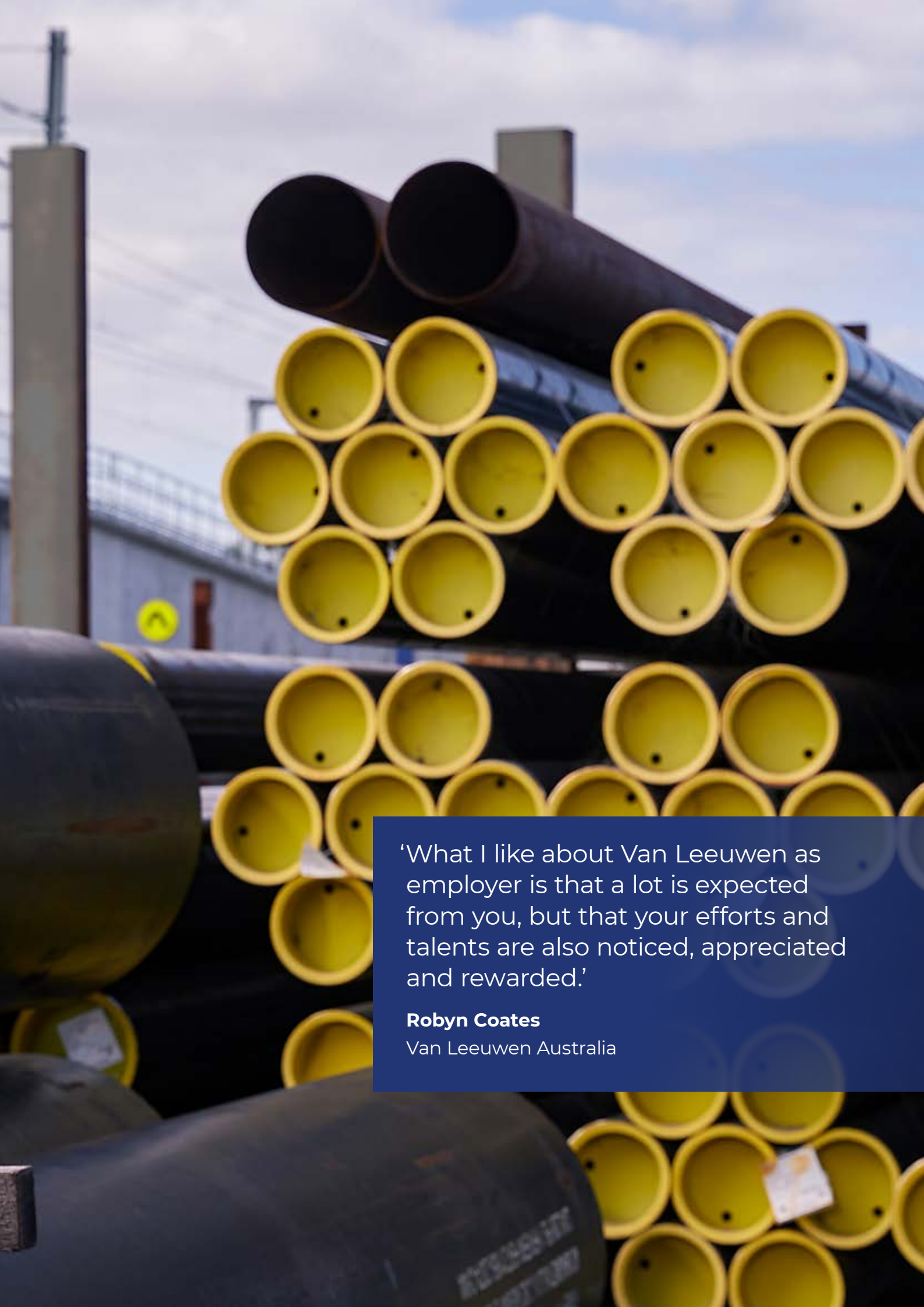
(before appropriation of profit, amounts x 1,000 Euro)

Assets	31-12-2021	31-12-2020
Fixed assets		
Tangible fixed assets	7,173	6,817
Tangible fixed assets		
Land and buildings	99,613	100,572
Plant and machinery	35,687	35,090
Other fixed assets	18,973	18,042
	154,273	153,704
Financial fixed assets	20,113	18,154
Total fixed assets	181,559	178,675
Current assets		
Inventories	345,776	236,584
Receivables		
Trade accounts receivable	212,243	156,583
Tax receivable	7,811	7,090
Other receivables	10,626	7,324
Prepayments and accrued income	13,413	9,575
Total receivables	244,093	180,572
Cash	41,528	91,983
Total current assets	631,397	509,139
Total current assets	812,956	687,814

Liabilities	31-12-2021	31-12-2020
Equity	267,106	243,430
Net result financial year	64,124	9,444
Group equity	331,230	252,874
Provisions		
Pensions	63,667	71,174
Deferred taxes	13,967	10,963
Other provisions	24,223	18,396
Total provisions	101,857	100,533
Negative goodwill	55,856	66,803
Other long term liabilities	14,521	14,194
Long term liability	70,377	80,997
Current liabilities		
Debts to credit institutions	19,591	59,444
Trade accounts payable and trade credits	199,327	130,824
Taxes and social security	31,792	27,712
Accrued liabilities	39,744	22,517
Other liabilities	19,038	12,913
Total current liabilities	309,492	253,410
Total Group Equity and Liabilities	812,956	687,814

- The operating working capital is € 359 million and as such is € 97 million higher than in 2020 due to an increase in stocks and trade accounts receivable, partly offset by the fact that debts to suppliers have also increased.
- The debt to credit institutions was reduced by € 40 million, primarily by optimizing worldwide cash positions.
- Solvency significantly improved from 36.8% in 2020 to 40.7% in 2021.





‘What I like about Van Leeuwen as employer is that a lot is expected from you, but that your efforts and talents are also noticed, appreciated and rewarded.’

Robyn Coates

Van Leeuwen Australia

Milestones 2021

20 January

Van Leeuwen extends the global contract with **ExxonMobil**.



26 January

After 18 months of construction, our company **Kindlimann AG** in Switzerland **moves** into its state-of-the-art location in Tobel-Tägerschen.

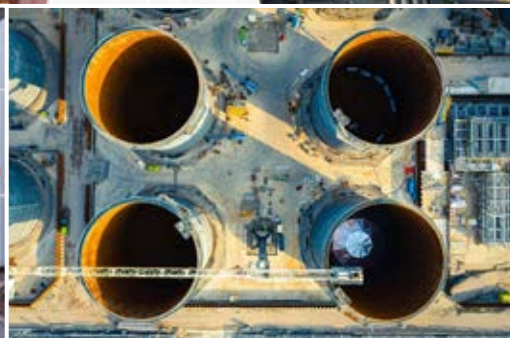
February

Van Leeuwen Canada wins a contract for 3,400 MT of pipes for an oil pipeline project. A decisive factor was the possibility of storing stocks on Van Leeuwen's premises. The pipes arrive at Van Leeuwen Canada for storage in September and will be delivered to the customer in the first half of 2022.



23 February

Two celebrations in Singapore in the last week of February. First of all **Van Leeuwen Singapore's 42nd anniversary**. Followed by the traditional lion dance to celebrate the Chinese New Year.



March

Van Leeuwen Zwijndrecht supplies over **80 km of pipelines** for the construction of the **Hes Hartel Tank Terminal**. Construction of this tank terminal in Rotterdam began in 2018. This project is completed in 2021.

29 April

Heléns Denmark puts its new saw into operation.



15 June

Van Leeuwen Germany completes the rebranding project. The logo and the red of Van Leeuwen are visible in various places, such as on trucks and on the building in Duisburg.



7 May

Van Leeuwen Zwijndrecht delivers hydrogen pipelines in Rotterdam for the expansion of the existing underground hydrogen pipeline network.



23 June

Van Leeuwen sponsors the Lion Foundation with the adoption of the lions Ayla and Aslan.

July

The **IT disentanglement program** is completed.

Following the acquisition of Benteler Distribution at the end of 2019, a project was initiated to disentangle the IT infrastructure, IT systems and telephony of the acquired company from its parent company Benteler.



13 July

Van Leeuwen Thailand celebrates its **30th anniversary**. Instead of a large celebration, a donation is made to a Thai charity that provides assistance to people hit by the corona pandemic. The company moves into a new office in August.



6 September

The **corona pandemic** once again plays a role in 2021. Fortunately travel and visits to sister companies are once again possible in the second half of the year. Colleagues of our **Belgian company Wauters**, for instance, visit their colleagues in **Sweden (Heléns)** and **Germany**.



23 August

The **Van Leeuwen Production Slovakia Quality Engineering** team uses advanced quality procedures to reduce the number of quality alerts from 144 in 2018 to just 19 in 2021.



13 September

Van Leeuwen Houston delivers a large order in Port Arthur, Texas for the **replacement of a pipeline** for a refinery.

30 September

First **Management Team Germany and Austria** meeting after eighteen months of MS Teams meetings.



4 October

Van Leeuwen Zwijndrecht acquires an order for 10 kilometers of pipes for a **water pipeline project** in the Netherlands.



1 October

Work continues on **OneHalmstad** in 2021. With this project our Swedish company **Heléns** is consolidating its warehouse, production and head office at a **single location in Olofsdalsvägen** in Halmstad. The roof is replaced and insulated.



14 October

Our branch **Wauters in Brussels** puts the new **HPSaw310 high-speed saw** – one of the fastest saws on the market – into operation. This saw now forms part of the twelve saws currently in operation in this branch.

22 October

Celebration of the official opening of the new office in the heart of Paris.



8 November

Together with transport company **Lensveld**, we are taking steps towards making our distribution operations CO₂-neutral. We initiate a joint pilot using a **Bio-LNG truck** supplied by Volvo.



7 November

Van Leeuwen teams once again participate in various sporting events throughout the world this year. For example, **Van Leeuwen France** for the second time participates in the **Ekiden Paris**, a running competition that starts and ends at the Eiffel Tower.



10 November

In **Houston, Texas** the **last truck** is loaded with **coated pipes** for a large pipeline project. Van Leeuwen supplied a total of almost 100,000 metric tons of pipes or more than 5,000 truck loads for this project.

23 November

The **SwinSolar** project starts up at the end of 2021. A **solar photovoltaic installation** will be installed on the roof of our warehouse in Zwijndrecht. The installation will provide for all of our electricity needs in the Netherlands in the near future. In addition, we will return enough electricity to the grid for over 1,300 households.



2021

This year **Van Leeuwen Slovakia** once again supplies various products to projects carried out by customers in the **Automotive segment** with whom we have long-term contracts.



1 December

The last project load of Van Leeuwen **pipes** for a **large gas project in Algeria** is shipped to that country from the Port of Tianjin in China.



15 December

Kindlimann AG celebrates its **75th anniversary**. Hans Kindlimann established the company on this same day in 1946 in Biel, Switzerland.

Centennial Collection

In 2014, during our ninetieth anniversary, we introduced the Centennial Collection. Each year, our most loyal customers qualify for an exclusive promotional gift. We initiated this collection in the year of our ninetieth anniversary and will continue to build up this collection until our centennial anniversary in 2024.

Dutch artist Floris Hovers was commissioned by Van Leeuwen to design this collection. Each year, a model version of a car is designed as a gift for our top 250 customers. We are distributing the eighth model among our most faithful customers this year.

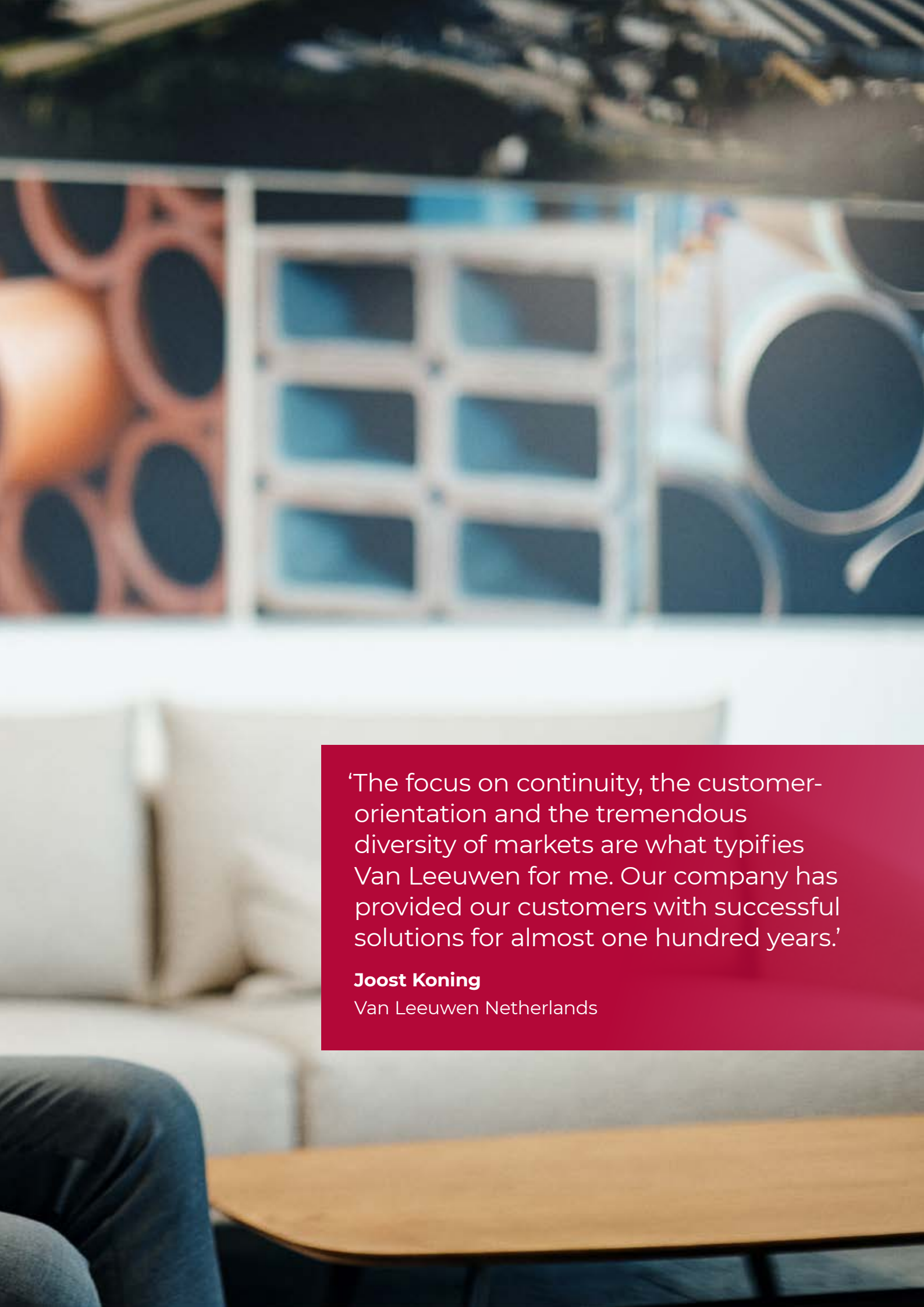


Our people

Our 2,429 people work in many different countries with a diversity of cultures. We have people from different generations with various talents and skills working in many different jobs, projects, processes and workplaces.

It is our pleasure to present a number of our colleagues in this Annual Book. Because, putting it concisely: our people make us 'more than tubes'.





‘The focus on continuity, the customer-orientation and the tremendous diversity of markets are what typifies Van Leeuwen for me. Our company has provided our customers with successful solutions for almost one hundred years.’

Joost Koning

Van Leeuwen Netherlands



‘People are the capital of our company. The interest and commitment are reflected by colleagues throughout the company.’

Name	Timo Sostmeier
Location	Van Leeuwen Germany
Position	Regional Sales Manager
At Van Leeuwen since	2020
Age	35

‘I thoroughly enjoy working in sales. My contacts with existing and new customers give me a great deal of satisfaction. In addition, in my leadership role I find it inspiring to get the most out of my team members. Sparring together to find the best solutions for our customers and then implementing them together. In my job I am able to perfectly combine these passions,’ says Timo Sostmeier, Regional Sales Manager at Van Leeuwen Germany.

‘I am responsible for a team of 25 colleagues who partly work in Frankfurt and partly in Mannheim,’ says Timo. ‘Together with the team I work on developing the best solutions for our customers each day. During the corona pandemic I learned to manage my team members remotely and in 2021 we still had to work from home of course. With the aid of software solutions, such as Microsoft Teams and Planner, we were able to quickly master working remotely together. The team adopted an extremely flexible attitude and I am proud of that.’

Global Key Account Team

One of the projects in 2021 that has given Timo a lot of satisfaction is the composition of the new Global Key Account Team in which he played a leading role. ‘With this team we are able to provide full-service solutions to our internationally operating customers,’ he says. ‘We appoint a single Account Manager for these companies at Van Leeuwen Germany, so that the customer does not need to interact with multiple Van Leeuwen Account Managers.’

For example, for a customer in the agricultural industry the Global Key Account Team gathers all of the pipe and tube products at a single location, so that they can be delivered as a single package. I am the point of contact for this customer.’

The Regional Sales Manager is pleased with all the opportunities he is afforded at Van Leeuwen to develop himself on a personal and business level. ‘I started off as a trainee and this allowed me to become familiar with various facets of the company’s business. I was also able to take various courses that enabled me to further improve my leadership skills,’ he says.

Focus on customers and people

In his opinion, Van Leeuwen distinguishes itself from other companies due to its major focus on customers; they are number one. In addition, a great deal of attention is focused on employees, on their development and wellbeing. To illustrate his point, Timo tells us about his meeting with the members of the Management Board in September 2021. ‘They were very interested in the day-to-day affairs of Van Leeuwen Germany and the topics that are of importance to our customers. I was also impressed by their detailed knowledge of the market and the challenges we are confronted with in the present times. The interest and commitment are reflected by colleagues throughout the company.’

As manager, Timo also devotes a lot of attention to people. ‘I consider this important, because people are the capital of our company.’

'I consider the international aspect of my job to be a major plus. I work closely together with colleagues throughout Europe and am given the opportunity of working at different locations in Europe.'



<i>Name</i>	Emelia Hjortenholt
<i>Location</i>	Van Leeuwen Pipe and Tube Group Head Office, Zwijndrecht, the Netherlands
<i>Position</i>	Project Manager Commercial Excellence
<i>At Van Leeuwen since</i>	2014
<i>Age</i>	34

The development of a new pricing strategy, a better digital connection with customers and the rollout of SAP S/4 HANA. Project Manager Commercial Excellence Emelia Hjortenholt is involved in different innovation projects at Van Leeuwen. 'I enjoy contributing ideas about how we can continue to make progress to even better serve our customers.'

'I form part of the Van Leeuwen Pipe and Tube Group's Commercial Excellence team and find working together with my colleagues to investigate how we can improve business processes very inspiring. This is how, as a company, you can continue to be successful and continue to add value for your customers,' says Emelia Hjortenholt, Project Manager Commercial Excellence. 'Setting goals together and then pursuing these goals. This gives me lots of energy. So Van Leeuwen is the perfect place for me. I am given every opportunity to do what I am good at and to get the most out of my talents.'

Pricing is key


Emelia has been with Van Leeuwen for about eight years. Heléns, Sweden is her home office, but she currently works at the head office in Zwijndrecht, the Netherlands on various international assignments, including the development of a new, improved pricing strategy. Emelia: 'We are working on the development of a new methodology, including a digital solution, that colleagues throughout Europe will be using in the near future. A methodology that provides more structure and offers more options to better anticipate market developments. Pricing is key in our business.'

At Van Leeuwen everything revolves around excellence in entrepreneurship, notes Emelia. 'In my view this, above all, is what typifies the company. What can we do to even better serve our customers, what are their needs and how do we help them advance even better? These are questions that we constantly give thought to and respond to. When you come up with a good idea and put forward a solid, well-supported plan, you are given the room you need to try it out. This way you continue to grow professionally and you also help the company move forward.'

Drive and commitment

'I consider the international aspect of my job to be a major plus. I work closely together with colleagues from every Van Leeuwen branch in Europe and am given the opportunity of working at different locations in Europe, thus enabling me to expand my contacts and network. This year I am working on a six-month project at the Van Leeuwen Pipe and Tube Group's head office in Zwijndrecht, the Netherlands. By intensively working together we also learn a great deal from each other. Working and living in another country is enriching, professionally as well as personally. Of course, at times we also intensely debate our ideas. But such debates primarily arise from everyone's drive and commitment. Time and again it strikes me that at Van Leeuwen we all want to do everything to the best of our ability. Because of this openness we also help each other move forward and come up with the best solutions together.'



The background of the image shows several large stacks of steel pipes. The pipes are arranged in neat rows, and many of the pipe ends are capped with bright blue or red plastic caps. The lighting is bright, highlighting the metallic texture of the pipes and the vibrant colors of the caps. The overall scene suggests a well-organized industrial or construction site.

'I considered it a challenge to start 'small' and to help the company grow. It gave me the opportunity of learning all of the business aspects in depth.

Fenti Kertasari

Van Leeuwen Distribution Indonesia



‘Once they have joined the company, employees are not likely to leave. Understandable, because here they are given every opportunity to grow.’

Name	Boris Guedel
Location	Van Leeuwen France
Position	Technical & Supply Chain Manager
At Van Leeuwen since	2021
Age	31

Boris Guedel started as Technical & Supply Chain Manager at Van Leeuwen France in Lyon in September 2021. Although he has only been working at Van Leeuwen for a short period of time, he is very impressed by the company’s entrepreneurial spirit. ‘Moreover, the lines are short, which makes it possible for us to quickly convert good ideas into concrete actions for our customers.’

Boris Guedel is 31 years old, but already has an interesting international career behind him. For example, he worked in the Middle East as Deputy Maintenance Manager for a company that is using desalination plants to convert sea saltwater into fresh water. In addition, he was employed by a globally operating manufacturer of copper conductors for electrical equipment as Continuous Improvement Manager and Supply Chain Manager. This international experience serves him well in his job as Technical & Supply Chain Manager at Van Leeuwen. His home base is in Lyon, France, where Van Leeuwen serves a wide range of customers on the French market from its more than 23,000 m² distribution center.

Successes

‘The customers of Van Leeuwen France operate in many different segments and their demands vary greatly,’ says Boris. ‘But because of our intensive cooperation with suppliers who are able to manufacture the pipes and tubes precisely in accordance with the customer’s specifications, we time and again perfectly succeed in meeting these demands.’

Boris is clear about his most important task as Technical & Supply Chain Manager: to ensure that his team of more than 35 dedicated and driven employees works together as a single team in order to provide customers with the best possible service. ‘I have been working here for six months now and have already achieved a couple of successes together with the team. We have improved project management by introducing new working routines with more precise objectives and deadlines. This way we work even better together, we have improved product delivery times and optimized the supply chain. Everyone likes to lend a helping hand to serve our customers effectively.’

The customer always takes center stage

In his view, the committed and passionate employees to a large extent determine the company’s success. ‘In France too there are colleagues who have been with the company for several decades. Once they have joined the company, employees are not likely to leave. Understandable, because here they are given every opportunity to grow on a personal as well as business level. For example, through additional training and advancing in their career within the company.’

Boris also notes that at Van Leeuwen the customer always takes center stage. The companies within the group work closely together to serve the customer as effectively as possible. ‘For example, recently we solved a problem in France for a customer of our branch in Sweden. The pipes were transported to France and in a very short period of time we cut the tubes to size and carried out the quality inspection. We then shipped the pipes directly to the customer.’

‘What I like about Van Leeuwen as employer is that a lot is expected from you, but that your efforts and talents are also noticed, appreciated and rewarded.’



<i>Name</i>	Robyn Coates
<i>Location</i>	Van Leeuwen Australia
<i>Position</i>	Sales Manager Victoria/Tasmania
<i>At Van Leeuwen since</i>	2018
<i>Age</i>	45

Robyn Coates, Sales Manager at Van Leeuwen Australia, has 25 years of experience in the pipe and tube industry. Over the years she has developed lasting relationships in the market and devoted efforts to acquiring broad and in-depth product knowledge. ‘At Van Leeuwen we are able to meet virtually any demand.’

When she was nineteen, Robyn started working as a salesperson for a large flange manufacturer. After this she worked for various global distribution companies in the pipe and tube industry. In 2018, with 20 years of experience under her belt, she joined Van Leeuwen as Sales Manager. She was hired at the Melbourne branch for Van Leeuwen’s global framework contract with ExxonMobil. She manages a sales team of two sales employees and one Account Manager in the states of Victoria and Tasmania.


Solid partnerships

‘For us as sales team, it is especially important to always know exactly what materials are available where and when, and of course also what you have on hand yourself,’ says Robyn. ‘Only on the basis of this knowledge are you able to share your ideas with the customer, give them proper advice and provide them with the best materials on time. Due to our solid partnerships with our customers and suppliers, we are able to meet virtually any demand. When customers need products, but are unable to find them anywhere, they know that they can always count on us. This is exactly why they always come back to us.’

You do not just become a sales specialist overnight. ‘Over the years I have learned a great deal from experienced colleagues about products and how the market works,’ says Robyn. ‘I took various product-related courses and I especially learned a great deal on the job’. But no matter how much experience you have, at Van Leeuwen you always continue learning. You are given ample room to continue to grow and try new things. For example, a while ago I suggested to management that we should do more business directly with refineries and gas companies. I expected to be able to generate cost savings this way. “Go ahead,” they said. This is exactly what typifies the company, this hands-on mentality. I very much like that.’

Appreciation

Van Leeuwen Australia serves many customers in the Process & Power segment. ‘For example, I have managed to acquire many loyal contacts in the refinery and gas market,’ says Robyn. ‘That produces great results. For example, in 2021 we succeeded in signing a large contract with Puma Energy Australia, through a project manager at Puma Energy with whom I have had an excellent relationship for years. Van Leeuwen Australia established a project team for this contract. This shows you that you must invest in your customers, and we amply do this at Van Leeuwen.’



'Van Leeuwen is not afraid to stick out its neck and to make large-scale investments when it sees an opportunity. Consolidating the warehouse, production and head office at a single location is an example of this.'

Johan Pettersson

Heléns, Sweden





Name	Joost Koning
Location	Van Leeuwen Netherlands
Position	Manager Marketing and Business Development
At Van Leeuwen since	2020
Age	30

‘The focus on continuity, the customer-orientation and the tremendous diversity of markets are what typifies Van Leeuwen for me. Our company has provided our customers with successful solutions for almost one hundred years.’

‘I am proud to be working at Van Leeuwen,’ says Joost Koning, Manager Marketing and Business Development at Van Leeuwen Netherlands. ‘I am focused on marketing, business development and managing improvement projects. It is a varied position in which I am able to effectively deploy my strategic and conceptual skills to create the maximum possible added value for our customers.’

Joost Koning has worked at Van Leeuwen since 2020. He provides the Dutch sales teams with information about developments on the international steel market and customer analyses, among other things, so that the teams can make the best business decisions. In addition, in consultation with colleagues, he translates the Van Leeuwen strategy into concrete initiatives and improvement projects.

Digitalization

Digitalization also is a high priority for him, and his most important goal in this respect is to achieve efficiency and convenience for customers. For example, in 2021 multiple new Electronic Data Interchange (EDI) connections were established with various customers. ‘The digital exchange of data with our customers and suppliers helps us improve our service delivery,’ says Joost. ‘It also saves our customers time and money, reduces the risk of errors and increases chain reliability.’ In addition, internal processes are being digitalized in order to realize efficiency gains and increase quality. An example of this is the registration of material certificates, which will be reconfigured this year using intelligent software.

Market Innovation Circles

Joost Koning and his colleagues are constantly giving thought to how they can make even better use of all the knowledge available within Van Leeuwen in order to even better serve customers. Market Innovation Circles were created last year for this reason. Each Market Innovation Circle consists of a team of commercial market experts from different European branches in our company. Joost: ‘I lead a team of eight European colleagues that focuses on the Civil Engineering & Construction market segment. The steel and shipbuilding segments, among others, form part of this.’

The fact that colleagues from different countries share their knowledge in the Market Innovation Circle, means that even more customers can benefit from our experience in this segment. For example, knowledge about pipe and tube applications in the shipbuilding sector in the Netherlands is being shared, which enables European colleagues to even better serve their customers.

Family business

‘The focus on continuity, the customer-orientation and the tremendous diversity of markets are what typifies Van Leeuwen for me. In addition, Van Leeuwen continues to be a real family business that for almost one hundred years has proven itself to be capable of providing successful solutions and creating added value for its customers,’ says Joost.

'I considered it a challenge to start 'small' and to help the company grow. It gave me the opportunity of learning all of the business aspects in depth.'



<i>Name</i>	Fenti Kertasari
<i>Location</i>	Van Leeuwen Distribution Indonesia
<i>Position</i>	Managing Director
<i>At Van Leeuwen since</i>	2001
<i>Age</i>	49

Fenti Kertasari started off as a salesperson at Van Leeuwen Distribution Indonesia in 2001. She rose to become the company's Managing Director. She is above all proud of her team. 'Our colleagues make the greatest possible effort to provide customers with the best quality pipes and tubes, and service. This is crucial in our business where being a reliable partner determines your success.'

'In 2001, when I started as salesperson at Benteler Distribution Indonesia we were four employees,' says Fenti. 'As a small team we tried to gain a foothold in this region. We primarily focused our efforts on the Process & Power segment, because this is where the best opportunities were. We now serve a large number of customers. We focus on the distribution of pipes and tubes to customers such as the palm oil industry, sugar plants, power plants and refineries.'

Starting small

'I considered it a challenge to start 'small' and to help the company grow. It gave me the opportunity of learning all of the business aspects in depth. Over the years I more or less carried out all of the possible tasks within the company,' says the Managing Director. 'Ranging from sales to procurement, and from order processing to organizing logistics. You learn a lot very quickly in actual practice. It is exactly because I now know what every function entails and what you are likely to be confronted with as employee that I am able to effectively manage the team and the business processes. I am currently managing thirteen employees.'

New business

'As manager you of course always look to see how things can be improved. For example, I am working on a plan to acquire new business. The markets in which we are operating are becoming increasingly more challenging. We are affected by rising oil and gas prices, for example, but we are also confronted with changing import requirements. This is why we are expanding our outlook and investigating how we can generate new business in other segments. The fact that we form part of a large international company is a big help in this regard. Our collective strength is that together we have access to many high-quality stocks, a global network of warehouses, extensive supply chain and project expertise, and a strong network of suppliers and logistics partners. At Van Leeuwen we help and learn from each other.'

Drive and commitment

Fenti can also count on the maximum drive and commitment of Van Leeuwen Distribution Indonesia's employees. 'We have a highly committed and driven team. They are the pivot of our company. Colleagues possess the right professional knowledge and excellent communication skills and are committed to the company. I could not ask for a better team. For example, during the corona pandemic we still managed to book a number of great new orders for projects at power plants and sugar plants. We succeeded in doing this by going all out. We not only make promises to our customers, we also deliver on our promises. Customers will only come back to you if you are a reliable partner.'



'I was able to optimally develop myself through work experience and training at Van Leeuwen. For example, I completed various technical training courses to become familiar with all product groups.'

Mark Reinhart

Van Leeuwen Canada





Name	Johan Pettersson
Location	Heléns Rör AB, Sweden
Position	Head Operations & SHEQ, SHEQ Manager Northern Europe region
At Van Leeuwen since	2017
Age	49

‘Van Leeuwen is not afraid to stick out its neck and to make large-scale investments when it sees an opportunity. Consolidating the warehouse, production and head office at a single location is an example of this.’

For Johan Pettersson, Head Operations & SHEQ at Heléns Rör AB in Sweden, 2021 was marked by the OneHalmstad project. He is working together with his colleagues on consolidating the warehouse, production and head office at a single location in Olofsdalsvägen in Halmstad. This will make it possible for the Van Leeuwen business to continue to grow in Sweden.

At the present time, Van Leeuwen’s company Heléns Rör AB in Sweden is still working from various locations throughout the Halmstad region. Its head office, which dates from 1968 and is located in Västergårdsvägen, is separated from the nearby warehouse and production facility. In addition, there is a third branch with a warehouse and production facility in Knäred, 40 km outside Halmstad.

‘Heléns is going to make considerable investments over the coming years, for example in more efficient machines and in a high-flow production line for precision materials. Consolidating the business units enables us to do this more effectively and allows us to work towards making our services even more efficient,’ says Johan. ‘With this centralization we bring all of the knowledge and experience of our colleagues together under one roof. This way we can work even more effectively on smart solutions for our customers.’

Great future

Johan has 25 years of experience in the pipe and tube industry and joined Heléns in 2017. He lauds the company’s entrepreneurial spirit. ‘Van Leeuwen is not afraid to stick out its neck and to make large-scale investments when it sees an opportunity,’ he says. ‘OneHalmstad of course is an example of this. It shows that Van Leeuwen believes in a great future

for Heléns and that creates a lot of positive energy within our company.’ In the near future, the company premises in Olofsdalsvägen will cover a total area of 60,000 m².

‘In 2021, we completed the expansion of the central warehouse by 5,000 m²,’ says Johan. ‘In addition, we relocated nine cutting lines and installed three new ones in the hall. This was one of the biggest challenges, because it required the roof to be temporarily removed. This required very close cooperation with our colleagues in the warehouse, production, technical services and production planning.’

Business continued as usual while construction was underway and of course, we also had to deal with all of the corona-related restrictions. This meant working without letup for all teams, but I am proud to see how far we have managed to come together. In 2022 we will continue with the construction of the new head office, among other things. We expect to be able to fully occupy the expanded company premises in January 2023.’

Listening

For a company such as Van Leeuwen, strong teams are indispensable, Johan emphasizes. ‘OneHalmstad once again proves this. An operation of this magnitude can only succeed when all employees feel committed and are prepared to put their shoulders to the wheel together. You can only expect colleagues to have this drive when you involve them in important decisions. As manager I try to do this to the best of my ability. For example, we took the advice of our production colleagues concerning the relocation of the cutting lines to heart. They are the experts in this area. It is important that you listen to your people.’

‘I was able to optimally develop myself through work experience and training at Van Leeuwen. For example, I completed various technical training courses to become familiar with all product groups.’



<i>Name</i>	Mark Reinhart
<i>Location</i>	Van Leeuwen Canada
<i>Position</i>	Inside Sales Manager
<i>At Van Leeuwen since</i>	2013
<i>Age</i>	33

Mark Reinhart was appointed Inside Sales Manager at Van Leeuwen Canada at the end of 2021. ‘Serving customers with our elaborate product portfolio and developing durable relationships with them is something I do with pleasure every day,’ he says. ‘I now lead a team of eight professionals, but I also regularly pick up the phone myself to maintain good contact with our key accounts.’

Mark Reinhart completed his Business Management studies at the University of Alberta in 2012. A year later he joined Van Leeuwen Canada as Inside Sales Representative. ‘It was a good choice, because over the years I was able to develop myself through work experience and training at Van Leeuwen,’ says Mark. ‘For example, I completed various technical training courses to become familiar with all product groups. This now enables me to effectively advise customers.’ In addition, he completed several courses to finetune his digital skills and to work more efficiently, ranging from a simple Excel course to intensive sales training courses.

A strategy for every customer

Mark’s elaborate technical knowledge, enthusiasm and zest for work attracted management’s attention. In the fall of 2021 he was appointed Inside Sales Manager. ‘I now lead an Inside Sales Team of eight employees and ensure we have a strategy for every customer. But I also regularly pick up the phone myself to maintain good contact with our key accounts. I am very hands-on in this role. Whether it’s about pricing, deliveries or specific requests, I always aim to offer our customers the best options.’

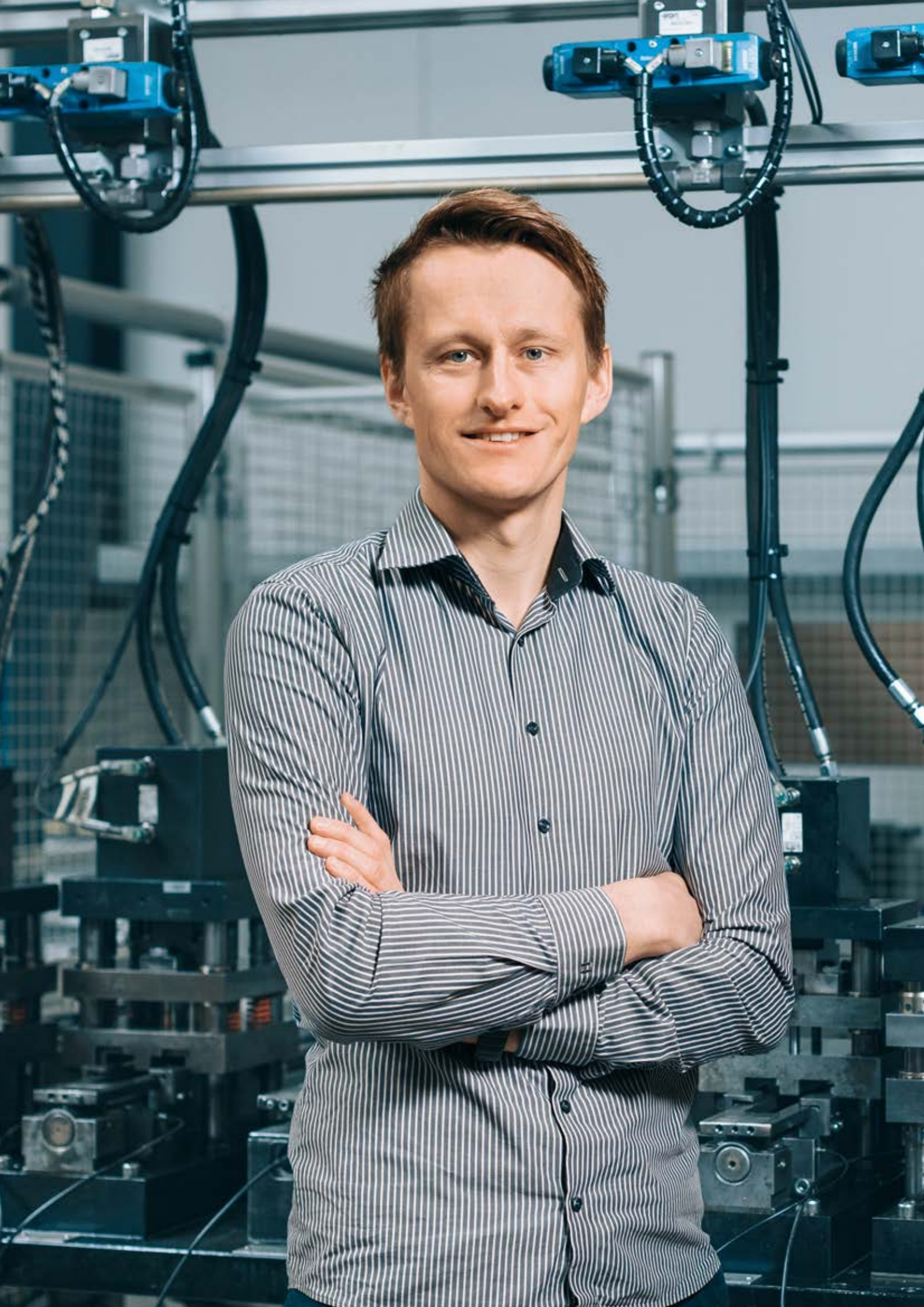
Mark gives an example of a recent project he is proud of. ‘One of our customers had an urgent need for replacing a pipeline below a railway emplacement in Winnipeg. It was of crucial importance for us to supply the right material on schedule since railway traffic had to be halted to carry out the replacement. We managed to deliver on time, while also testing the pipe and the coating.’

Pipeline for Toronto’s downtown

‘For a similar project we recently also delivered a new pipeline for Toronto’s downtown that runs below the light rail transport line in the inner city,’ says Mark. ‘The materials were not available on the Canadian market on short notice, but we succeeded in finding them in the United States within the required timeframe. At the customer’s request, we carried out multiple material tests and supplied the pipes to the coating company. After this we shipped the coated and tested pipes from Alberta to Toronto on time. This in turn enabled the customer to complete its contract on schedule.’

‘The market is currently highly volatile and we are confronted with a scarcity of materials,’ says Mark, ‘but fortunately, the Van Leeuwen teams are strong in procurement and in keeping stocks up to par.’

Mark is happy with all of the opportunities he has at Van Leeuwen. ‘People really are considered to be key to the company here,’ he says. ‘Top management is also very approachable. Employees are heard and involved in important decisions.’





'You are given every opportunity to develop yourself. For example, in 2020 I was asked to lead the global Market Innovation Circle for the Automotive segment.'

Michael Moczorodynski

Kindlimann AG, Switzerland



Name	Michael Moczorodyski
Location	Kindlimann AG, Switzerland
Position	Head of Sales and Purchasing
At Van Leeuwen since	2013
Age	37

'You are given every opportunity to develop yourself. For example, in 2020 I was asked to lead the global Market Innovation Circle for the Automotive segment.'

The Automotive segment distinguishes itself from other markets through its long-term and intensive customer relationships. 'The cooperation with our customers often begins years before a new vehicle model shows up on the market,' says Michael Moczorodyski, Head of Sales and Purchasing at Kindlimann AG in Switzerland, a Van Leeuwen company.

Every single one of Kindlimann's Automotive customers has its own very specific set of product requirements. To be able to serve them as effectively as possible, we decided to keep our sales and purchasing functions combined. 'We work intensively with our customers on joint projects over the long term,' Michael explains. 'To be able to effectively combine supply and demand it is essential for employees to be precisely aware of the customer's needs and at the same time to have proper insight into the capabilities of our different suppliers and what they can manufacture at our request. This is why employees here are involved in sales as well as purchasing.'

Advanced production department

Michael is responsible for coordinating projects with customers in the Automotive segment. 'Initial communications are generally established at least three to four years before a new vehicle rolls off the assembly line,' he says. 'Customers first forward the specifications for the parts, so that we can assess the feasibility and offer them a price. Before a vehicle goes into production, the manufacturer usually goes through multiple trial runs, using a number of prototypes and pre-series parts to validate the design and ensure that the parts fulfil the dedicated function.' Kindlimann's highly advanced production department in the Swiss village of Täggerschen has more than 60 processing machines to supply customers with custom-made solutions.

The machines range from high efficiency cutting centers to dedicated automated stamping and forming processing lines to laser welding cells. There is also space for further growth and further automation of existing processes, for instance by using robots. Michael: 'My technical background and engineering education help in what we do, which is selling the optimal technical solution to our customers.'

Challenging year

Kindlimann has gone through a challenging year. Companies in the Automotive segment recovered faster from the impact of the corona pandemic than expected, which resulted in record volumes at the beginning of the year. 'This has forced us to quickly change gears with all of our suppliers to be able to deliver the required parts on time. In the end, we managed to meet all of our customers' demands. In addition, Kindlimann is in advanced discussions with two large new customers,' says Michael. He maintains close contact with Van Leeuwen's head office in Zwijndrecht, the Netherlands. 'We are given a lot of freedom to follow our own path. In my position I have contact with all levels within the organization, with customers, suppliers and managing directors, as well as with colleague managers and colleagues responsible for operations. That makes the work especially attractive.'

'You are also given every opportunity to develop yourself. For example, in 2021 I was asked to lead the global Market Innovation Circle for the Automotive segment. A team of commercial market experts from different Van Leeuwen European branches works together in this Market Innovation Circle. We combine our knowledge and experience, and use our international footprint to provide customers with optimal solutions, as Automotive customers are all global players not confined to a local market.'

‘We are capable of quickly changing gears, internally as well as with customers and suppliers, and everyone thinks in terms of solutions and making progress. That gives our teams the energy they need to go for it.’



<i>Name</i>	Miroslav Týr
<i>Location</i>	Van Leeuwen Czech Republic
<i>Position</i>	Production Manager
<i>At Van Leeuwen since</i>	2021
<i>Age</i>	38

Miroslav Týr is Production Manager at Van Leeuwen Czech Republic. He has become a specialist in the Automotive segment. ‘Customer demands in this segment are high. However, because of our in-depth knowledge of products, quality requirements and the market, we always succeed in meeting expectations.’ Van Leeuwen Czech Republic invested in two new laser machines for the largest order it acquired in 2021.

In 2008, after completing his electrical engineering studies, Miroslav started his electrical engineering career. Five years later he moved over to the Automotive segment. ‘Product innovation in this segment is proceeding at a rapid pace and I find that appealing,’ says the Production Manager. ‘For me it is extremely exciting to be so closely involved in technological innovations. The engineering possibilities are unprecedented, particularly in this sector.’

Knowledge sharing

Miroslav successively worked for a French and German firm in the Automotive segment and in various capacities. For example, he was Process Engineer and Lean Manager. ‘In these positions I acquired broad and in-depth knowledge of products and production processes. This experience is now serving me very well in my current job at Van Leeuwen. Whenever possible, I share my knowledge with colleagues. In addition, as Production Manager, I am responsible for the long-term production plans, as well as resource and budget allocations. Moreover, I work on daily operating challenges and manage the production team, including colleagues from maintenance and the engineers.’

‘The number of customers in the Automotive segment at Van Leeuwen Czech Republic has grown in recent years,’ says Miroslav. ‘Two years ago, just over half of our customers came from this segment. Today this is more than seventy-five percent. And we expect this growth to continue.’

Biggest challenge ever

At the beginning of 2022, the team in the Czech Republic faced its biggest challenge ever. ‘In 2021, we acquired a very sizable and long-term contract from Benteler,’ says Miroslav. ‘For this project we produce tubes for the dashboard (crossbeam) of cars with the same technical platform (such as Kodiaq, Tiguan and Ateca). This involves over two million tubes annually. We invested in two ultramodern laser machines for treating these tubes.’

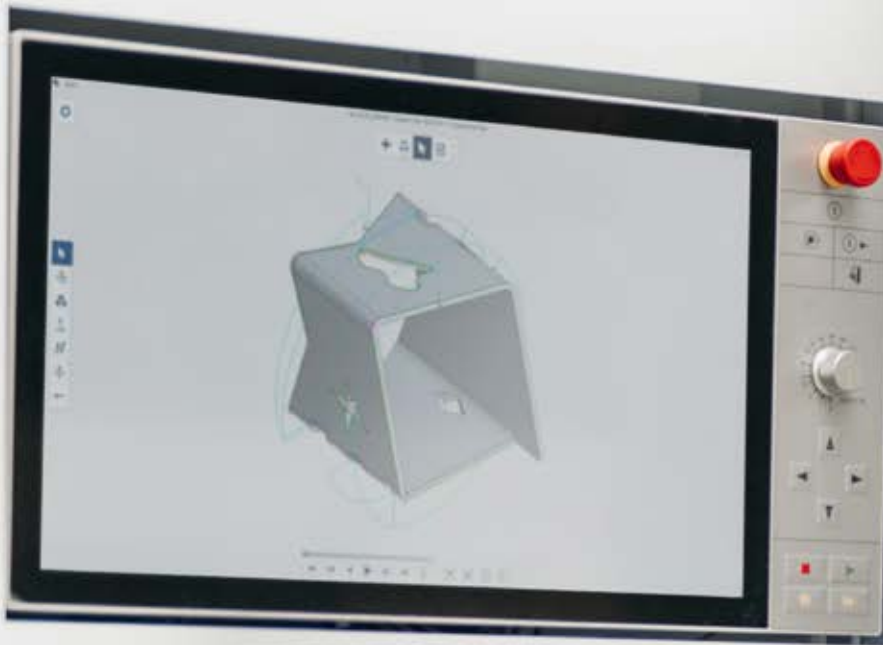
‘The project’s challenge primarily lies in the planning. On average we have 12 to 24 months from a project’s start-up to delivery to the customer, but for this project we have only six months from start-up to making the first year’s deliveries. This demands a very strong logistics capability and a strong team. Fortunately, we have both.’

‘Van Leeuwen is a transparent company, that does not constrain us with absurdly stringent rules,’ says Miroslav. ‘In the above-referenced project this works to our advantage. We are capable of quickly changing gears, internally as well as with customers and suppliers. And everyone thinks in terms of solutions and making progress. That gives our teams the energy they need to go for it.’

TRUMPF



TruLaser Tu



'We are capable of quickly changing gears, internally as well as with customers and suppliers, and everyone thinks in terms of solutions and making progress. That gives our teams the energy they need to go for it.'

Miroslav Týr

Van Leeuwen Czech Republic



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'The well-known decisive Dutch business mentality is present throughout the entire company. This cheerful spirit brings out the best in everyone.'

Name **Fabrizio Marturano**

Location **Van Leeuwen Italy**

Position **Commercial Director**

At Van Leeuwen since **2013**

Age **35**

In 2013, Fabrizio Marturano joined Van Leeuwen Italy as a trainee. A year later he was asked to set up a new business unit for the Automotive segment. Today, this is the largest segment served by Van Leeuwen Italy and Fabrizio was promoted to Commercial Director in 2021.

'Immediately after I completed my economics studies I was able to join Van Leeuwen Italy as a trainee,' says Fabrizio. 'In 2014, I was asked to investigate how we could start serving customers in the Automotive segment. It meant starting from zero. I put together a team of three colleagues and together we managed to quickly acquire knowledge about customers in the Automotive segment, their needs and the market trends. On the basis of this knowledge we succeeded in attracting new customers. Naturally, our close relationships with suppliers were, and still are, helpful in this respect. If a specific product is not available, we can always have it developed at the request of the customer. This segment virtually always requires custom work.'

New South-Eastern Europe region

One of the new initiatives developed in 2021 by Van Leeuwen Italy together with the branches in Romania and Turkey was the formation of the new South-Eastern Europe region.

'The management of these three branches is working together as a team to optimize the services provided to our customers

in this region and to increase market share, particularly in the Mechanical Engineering, Automotive, Hydraulics and Process & Power segments,' says Fabrizio.

'Due to the corona pandemic, 2021, just like 2020, was a challenging year. We were confronted with a scarcity of materials and rising prices,' says Fabrizio. 'Just when the market began to stabilize somewhat at the beginning of 2022, the war in Ukraine broke out, causing the deck to be reshuffled once again. Now there is again uncertainty about what the medium-term future will be like for our business. We hope for the best, especially for the people in Ukraine.'

'Just do it'

Fabrizio is fully confident about the long-term future. 'Financially, we continue to be in a very good position, but even more importantly, the people working at Van Leeuwen are people who see opportunities, and they are given the room they need to seize these opportunities. Time is not wasted on endless meetings; instead, we always look to see how we can improve things in efficient ways. We then prepare a plan and after that we just do it. This well-known decisive Dutch business mentality is present throughout the entire company. I enjoy working this way. This cheerful spirit brings out the best in everyone. I am convinced of that.'

‘We are active in a wide range of markets throughout the world. Talented and driven people work here that like to go the extra mile for our customers.’



<i>Name</i>	Felipe Augusto
<i>Location</i>	Van Leeuwen United Kingdom
<i>Position</i>	Sales Business Manager
<i>At Van Leeuwen since</i>	2019
<i>Age</i>	33

Felipe Augusto has been employed as Sales Business Manager at Van Leeuwen United Kingdom since 2019. His team has significantly expanded over the past three years. ‘I appreciate the confidence I am given to be allowed to lead this great team.’

As Sales Business Manager, Felipe Augusto forms part of the Van Leeuwen United Kingdom management team. In addition, he provides the day-to-day management for a sales team that operates from three locations: Sheffield, Brierley Hill and Basingstoke. ‘Together we are responsible for serving a group of small and medium-sized customers, primarily companies in the Mechanical Engineering segment,’ says Felipe. Felipe has a degree in engineering. Before joining Van Leeuwen in 2019, he worked for various other companies, including a construction company and an industrial company. This provided him with an excellent foundation for his current position at Van Leeuwen. He further finetuned his skills with a master’s degree in Innovation Management & Entrepreneurship.

Implementation of webshop

Felipe: ‘My specialty is finding the best technical solutions for our customers. This is why I am perfectly at home in my present position. I also like to identify niche markets in which we can play

a role with our products over the long term.’ Felipe is proud of the implementation of a webshop for customers in the United Kingdom in 2021. ‘In 2019, I visited Van Leeuwen’s Swedish company Heléns for this purpose to learn from the experience gained by our colleagues there. They had previously launched a similar webshop. Next, together with my own sales team, I developed a plan to set up a webshop in the United Kingdom. The webshop has since become operational. This enables us to offer our customers an online price list that is always current. In addition, customers with price or discount agreements can make online calculations and place orders online. We aim to improve the customer experience with this new webshop.’

Investing in the future

Van Leeuwen is a great company to work for, according to Felipe. ‘We are active in a wide range of markets throughout the world. Talented and driven people work here that like to go the extra mile for our customers.’ In addition, Felipe finds it interesting to form part of an organization that through an acquisition (of Benteler Distribution in 2019) has become twice as large and fully invests in the future. Felipe wants to continue to develop his skills to be able to serve Van Leeuwen to the best of his ability in the future. ‘Who knows, perhaps I will be able to advance to take on a global role. In any event that is my dream and my ambition.’



Human Resources



Our people form the most important part of our company. Their knowledge, experience, ambition and drive are determining factors in Van Leeuwen's success. We therefore give our people all the room and opportunities they need to continue learning and growing. This is why, with our People Strategy, we will continue to invest in our employees in the coming years as well. This way our people will continue to feel challenged and to derive satisfaction from their work. And they may continue to say with pride: 'I work at Van Leeuwen'.

Our 2,429 employees represent 58 different nationalities while working in 75 branches in 33 countries. Women comprise 30% of the total workforce, men comprise 70%.

Van Leeuwen has a strong position in the market and an engaging ambition for the coming years. We can only achieve this when our people thrive. We do this by ensuring an open working culture with excellent colleagues and leaders. We create an environment in which the role and contribution of our people is clear, we share information and consider the input and opinion of our employees important. In addition, we encourage our people to constantly develop themselves further. We take our people seriously, consider it important to sketch out a clear future and seek an effective dialogue with respect, attention and support.

A culture in which our people are seen and appreciated and in which they do their work with motivation, pride and satisfaction is a key spearhead of our People Strategy. We fully invest in our people. We consider this important. This is why we have an ambitious HR agenda for the coming years in which employee development is a key theme. We will be rolling out a new leadership program. We are offering our employees a new portfolio of e-learning courses. In addition, in 2022 we will initiate a new trainee program throughout the world designed to attract and develop new young talent within our company. This will enable colleagues to continue to develop themselves optimally and to even further improve themselves, each other and the company.

Performance management cycle

In 2021 we developed various initiatives to enable us to remain a successful company and an attractive employer, for young

talent and experienced colleagues alike. We laid down a solid foundation for a new performance management cycle in 2021. With this cycle, we aim to help our people develop themselves further and prepare our company for the future. By creating an open and motivating dialogue between leaders and employees, our leaders will be able to manage Van Leeuwen even better and our people will be able to perform to the best of their ability. We will start to implement the performance management cycle in 2022.

Workday – a state-of-the-art HR digitalization system – is an important part of our People Strategy. Workday facilitates all of the above-mentioned new ways of working. In 2021, additional colleagues in even more countries were connected to the system. Workday is now operational in 19 countries and 1,900 employees have access. We aim to connect the other branches and complete the rollout in 2022.

Flexible and solution-oriented

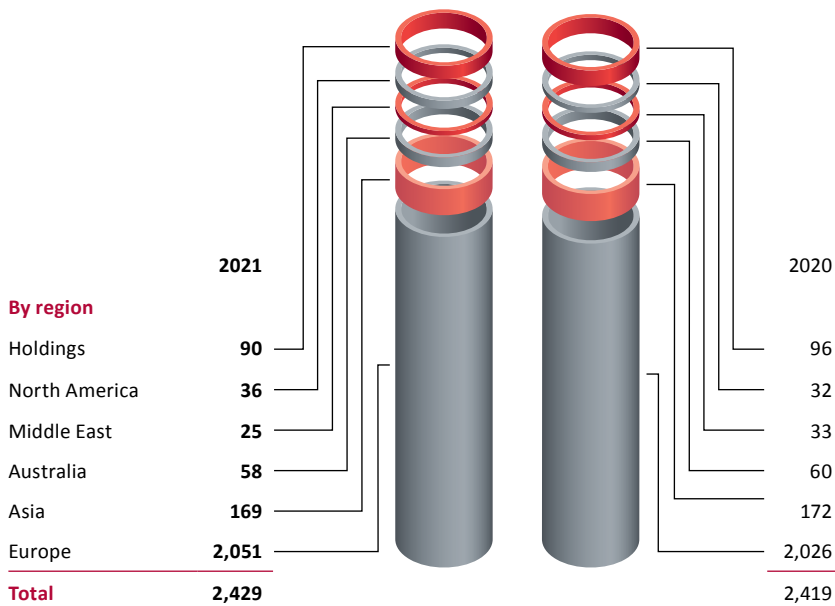
In 2021, for the second year in a row, the corona-related safety measures put high demands on our people's flexibility and ability to adapt. They once again tackled all challenges extremely effectively and have shown that they are extraordinarily solution-oriented and flexible. In a very short period of time our people managed to respond to the new market conditions exceedingly well. This has to a great extent contributed to the excellent operating results in 2021.

Van Leeuwen competencies

In 2021, we defined the new Van Leeuwen competencies we need to continue to be the number one pipe and tube specialist. In the future these competencies will be the key focus of all of our HR processes for attracting new people, performance management, development and leadership, and for our Van Leeuwen culture. In addition, Van Leeuwen will increase its focus on the diversity & inclusion and gender equality themes over the coming years.



Number of employees at Van Leeuwen



Leadership program

In 2022, we will initiate a new leadership program linked to our strategy. Together with our managers we investigated what our organization needs for the future. We aim to retain our existing strengths in this respect, such as customer-orientation, innovative entrepreneurship and a ‘can do’ mentality. In addition, we are working on further developing competencies such as strategic thinking, digital skills and operating successfully in an increasingly more complex global market.

New HR community

In 2021, we also developed a new professional HR community within Van Leeuwen. We strengthened our Global HR team with new regional HR leaders, a new Talent & Development Manager and a Corporate HR Manager for the head office. Our new Recruitment Manager is working on repositioning Van Leeuwen on the job market and is helping us further develop our role as good employer. In 2022, we will initiate our new recruitment processes and launch our new global Van Leeuwen recruitment website.

Distribution



At Van Leeuwen we work on providing our customers with the best possible service every day. To do this we continuously invest in improving our operational, logistics and IT processes, and in the fit-up of our warehouses. This way we increase our delivery reliability and it also enables us to meet the high demands placed on us by our customers.

To create an efficient supply chain we constantly align the networks and stocks of our branches with each other as seamlessly as possible. This way we succeed again and again in delivering the right materials in the right quantities to the customer on time. In 2021, high delivery reliability was once again essential and our employees always maintained a clear focus in this respect.

Optimizing our activities

To further strengthen our position, we continuously focus on improving the productivity and effectiveness of our processes. Standardizing and simplifying our processes are leading principles in this respect. To attain even better results, we sometimes opt to relocate or integrate certain activities. This also increases efficiency and reduces costs, as well as our footprint. One of our largest investments in 2021 is the expansion of Heléns Rör AB, Van Leeuwen's company in Sweden. Under the header OneHalmstad, Heléns is consolidating its warehouse, production and head office at a single location in Olofsdalsvägen in Halmstad. In the future the company's total surface area will be 60,000 m². Construction

work started in November 2020 and we expect to be able to fully occupy the new company premises in January 2023. Over the coming years the consolidation will provide an opportunity for making considerable investments in more efficient machines and in a high-flow production line for precision materials. Bringing our colleagues and their knowledge and expertise together under a single roof enables us to work even more effectively on smart solutions for our customers.

New stock-keeping locations

We renovate our stock-keeping locations or build new ones if this enables us to increase our returns and do even more for our customers. For example, in 2021 we developed a design for renovating our warehouse in Zwijndrecht, the Netherlands using the latest state-of-the-art logistics solutions. We will sign contracts with the selected contractors in the first half of 2022 so that we can expeditiously start working on renovating the warehouse. Over the coming years we will continue to invest in our international logistics network in order to even further improve our safety, reliability, service and efficiency.

Plant and machinery

With our investments in plant and machinery we are constantly expanding our value added services. To be able to continue to effectively respond to changing market demand, we maintain a comprehensive overview of the treatments we can perform at each location, and where it is necessary to replace machines, relocate them to another location or to purchase new types of machines. In 2021, with a view to market demand trends, continuity, efficiency and capacity, Van Leeuwen decided to purchase various new saws and treatment machines for locations in various countries including the United Kingdom, Sweden, Belgium, the Netherlands, Slovakia, Germany, Switzerland and Denmark. This machinery will be installed in the first half of 2022. This way we ensure that the performance of our processing facilities is always up to par.

In Europe alone we have over 360 machines, including over 230 saws, that enable us to provide virtually any custom treatments. Our investment policy is driven by market demand, business continuity, efficiency and the latest technological developments.





ISO standards

Van Leeuwen's quality policy has been ISO standards-based for many decades. The ISO 9001 standards are embedded in the procedures, processes and culture of our organization. For example, 68 locations possess an ISO 9001 certificate. We guarantee the level of quality of the materials we purchase by working together with a select number of suppliers. Before we admit these suppliers to our Approved Manufacturers List (AML), we thoroughly validate their processes and quality. Specific standards are applied within the Automotive industry which we also apply within our branches that supply materials to this customer group. These branches are consequently IATF certified. In 2021, we took a first step towards integrating the quality system used by the Van Leeuwen branches with the quality system used by the branches of the former Benteler Distribution company that we acquired in 2019. Both quality systems will be merged into a single ISO 9001 standards compliant system in the first quarter of 2022.

Quality, Environment and Safety

The welfare of employees and the sustainable development of the living and working environment are a high priority for us. Safety is a priority in our processes and our safety culture is based on our global standards and procedures that are linked to the "Van Leeuwen Life Saving Rules". The rules and procedures are directly related to ISO 45001. In 2021, we initiated a new safety campaign and the number of accidents resulting in absence from work decreased by 17%. While this is a positive development, we continue to aim for a further decrease.

Having certified quality, environment and safety management systems is a condition in our supplier selection process. In 2021, we appointed a Sustainability Manager. This new colleague provides the stimulus needed to make our business processes more sustainable and ensures that we continue to make progress in this area. For example, we aim to load our transport vehicles as efficiently as possible in order to reduce the kilometers driven and therefore CO₂ emissions as well. In addition, in 2021 we initiated a trial with LNG-fueled trucks.

Further EDI developments

At Van Leeuwen we make use of a platform that enables us to communicate with all parties in the supply chain through means of EDI. This enables us to receive customer orders, send out confirmations, supply delivery information in real time, as well as make certificates and invoices available. We also communicate with suppliers and carriers through EDI. That provides us with rapid insight into product availability and delivery times. In 2021, we connected additional customers to EDI and new EDI connections were also established with suppliers.

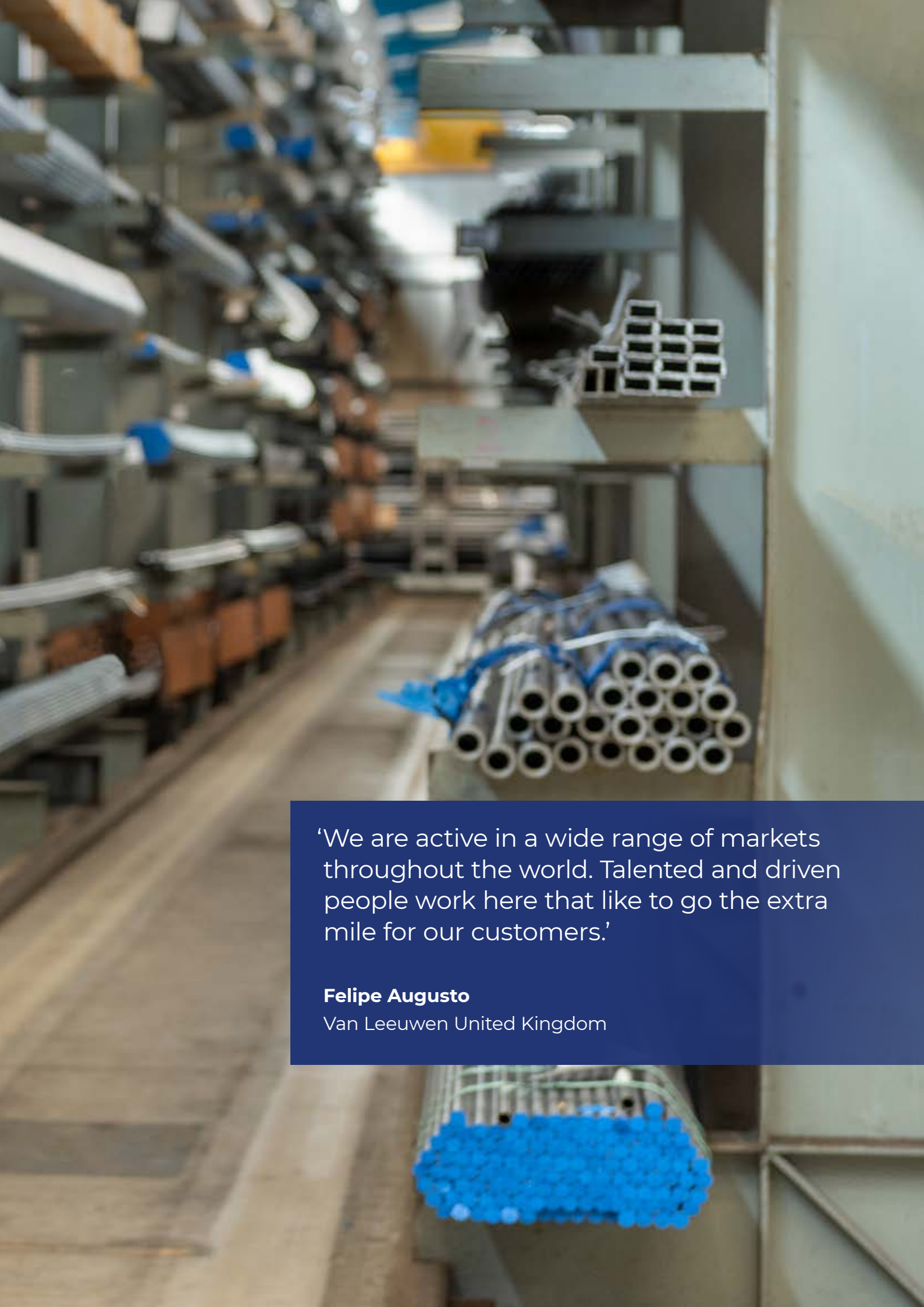
Transport

To create an efficient and smoothly running transport network we often work together with permanent carriers that always supply reliable services. By constantly analyzing the logistics flows, we constantly aim for affordable solutions with excellent delivery frequencies and the right speed. By segmenting flows and applying different logistics concepts, we are able to supply custom services.

Projects

Van Leeuwen has experienced international project teams that have all the necessary knowledge and experience to be able to optimally support customers throughout the entire delivery process. Ranging from the information and proposals phase through to the packaging and shipping of the pipes and pipe and tube applications. Our own project teams, as well as those of the customer, can monitor a project's progress in real-time using our in-house projects database. This way customers know exactly which materials are underway and to what location. This tool can be used internationally.





'We are active in a wide range of markets throughout the world. Talented and driven people work here that like to go the extra mile for our customers.'

Felipe Augusto

Van Leeuwen United Kingdom



Van Leeuwen in 2021



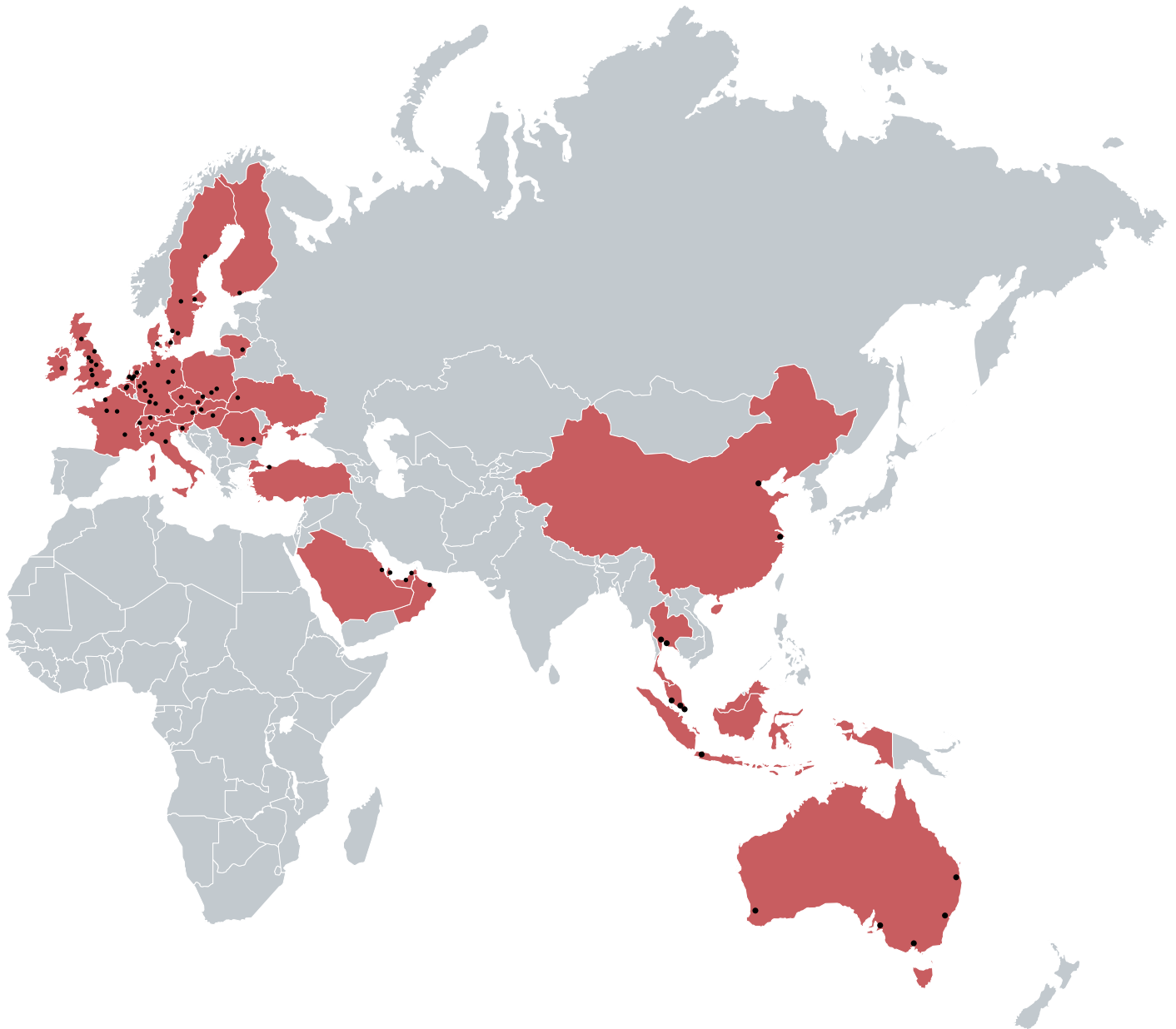
Countries	33
Offices and warehouses	75
Available storage area	760,000 m²
Different items in stock	200,000
Employees	2,429
Nationalities	58

North America

Canada
United States

Contact details

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- Saudi Arabia
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Asia/Australia

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- Indonesia
- China
- Australia

Personal particulars

Supervisory Board

J.H.R. Kretzers, Chairman

Nationality	: Dutch
Year of birth	: 1956
Previous positions	: Executive Vice President Projects Royal Dutch Shell Group Member Management Board Shell Nederland B.V.
Other supervisory positions	: Member Supervisory Board Van Oord N.V.
Appointed	: 15-04-2015

T.J.G. Collet d'Escury

Nationality	: Dutch
Year of birth	: 1966
Current position	: Managing Partner Roland Berger Amsterdam
Previous positions	: Deputy CEO & Member Global Executive Committee Roland Berger
Other supervisory positions	: Member Supervisory Board Investment Fund for Health in Africa (IFHA BV) Chairman Supervisory Council of Delft University of Technology
Other positions	: Member of the Board of Roosevelt Foundation
Appointed	: 01-05-2019

K.P. den Hartogh

Nationality	: Dutch
Year of birth	: 1965
Current position	: Group Managing Director Royal Den Hartogh Logistics
Previous positions	: Board member ECTA (European Chemical Transport Association) Board member TLN (Transport Logistiek Nederland - trade association)
Appointed	: 01-05-2019

R.J. Lamé

Chairman Audit Committee

Nationality	: Dutch
Year of birth	: 1956
Previous positions	: Member Management Board Joh. Mourik & Co Holding B.V. Director Gemco Industries B.V.
Other supervisory positions	: Chairman Supervisory Board Wessem Holding B.V. Member Supervisory Board Maatzorg Brabant B.V.
Appointed	: 14-06-2017



*From left to right:
R.J. Lamé,
T.J.G. Collot d'Escury,
C.C.Th. Rietberg,
J.H.R. Kretzers,
K.P. den Hartogh
A.F. van der Touw*

C.C.Th. Rietberg

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

A.F. van der Touw

Nationality	: Dutch
Year of birth	: 1955
Previous positions	: Chairman of the Board Siemens Nederland N.V. Member Supervisory Board Deloitte Nederland
Other supervisory positions	: Chairman Supervisory Board TenneT Holding B.V. Chairman Supervisory Council Leiden University Chairman Supervisory Council Nederlandse Bachvereniging
Appointed	: 01-06-2021

Management Board and Executive Board

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; Legal; Corporate Communications

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

Nationality	: Dutch
Year of birth	: 1966
Previous important positions held	: Managing Director Van Leeuwen Precisie B.V. Regional Managing Director Van Leeuwen Pipe and Tube (Singapore) Pte Ltd
Other position	: Member Supervisory Board Hittech Group B.V.
Date of commencement	: 02-03-1992
Appointed to current position	: 01-09-2007
Specific areas of responsibility	: The Netherlands, Germany, Nordics, Switzerland and Australia; Commercial Excellence

V.M. Geerts, Member of the Executive Board and CFO

Nationality	: Dutch
Year of birth	: 1972
Previous important positions held	: CFO Bunge Loders Croklaan CFO IOI Loders Croklaan
Date of commencement	: 01-05-2021
Appointed to current position	: 01-05-2021
Specific areas of responsibility	: Finance, IT and Compliance

J.F. Weerstra, Member of the Executive Board

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	: Belgium, France, Asia, Middle East and North America; Global Project Organization and Procurement

T.O. Beer, Member of the Executive Board

Nationality	: German
Year of birth	: 1967
Previous important positions held	: CFO Benteler Distribution International GmbH Financial Director Bosch Lawn and Garden Ltd
Date of commencement	: 01-12-2019
Appointed to current position	: 01-12-2019
Specific areas of responsibility	: United Kingdom, Central and South-Eastern Europe; Supply Chain, Operations, Production and QSEH

C. van Nieuwkerk, Member of the Executive Board

Nationality	: Dutch
Year of birth	: 1966
Previous important positions held	: Regional People & Culture Director Europe ISS Facility Services People & Culture Director Netherlands ISS Facility Services
Other position	: Member Supervisory Board Royal Swinkels Family Brewers
Date of commencement	: 01-11-2020
Appointed to current position	: 01-11-2020
Specific areas of responsibility	: Corporate HR and Organization; Sustainability



From left to right: Joop Sassen, Hans Weerstra, Vincent Geerts, Peter Rietberg, Caroline van Nieuwkerk, Torsten Beer.

Management



Peter Rietberg
Chairman of the
Management Board



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



Vincent Geerts
Member of the
Executive Board
and CFO



Hans Weerstra
Member of the
Executive Board



Torsten Beer
Member of the
Executive Board



Caroline van Nieuwkerk
Member of the
Executive Board



Steven Ruijters
Managing Director
Van Leeuwen branches
the Netherlands



Johan Meijer
Commercial Director
Van Leeuwen Precisie



Frits Veraa
Commercial Director
Van Leeuwen Stainless



Thijs van Dulm
Commercial Director
Stainless Europe



Andreas Schmidt
Managing Director
Van Leeuwen Germany
& Austria



Thorsten Müller
Managing Director
Van Leeuwen Germany
& Austria



Jörg Hassler
Commercial Director
Van Leeuwen Germany
& Austria



Meikel Pitsch
Commercial Director
Van Leeuwen Germany
Process & Power



Pieter Smaege
Regional Managing
Director Belgium &
France



Steve Vandermeulen
Commercial Director
Belgium



Nadia Chhiti
Commercial Director
Wauters Belgium



Nicolas Vancaeyseele
Commercial Manager
Van Leeuwen France



Cédric Jacopucci
Commercial Director
Normydra France



Bob Heath
Managing Director
Van Leeuwen
United Kingdom



Kris Bowling
Managing Director
Van Leeuwen
United Kingdom



Eva Täljegård
Regional Managing
Director Heléns Sweden



Stig Rex
Managing Director
Heléns Denmark



Vytautas Kausas
Managing Director
Van Leeuwen Lithuania



Pirmin Helbling
Managing Director
Kindlimann Switzerland



Roger Gähler
Managing Director
Kindlimann Switzerland



Karin Rose
Regional Managing
Director Van Leeuwen
Central Europe



Hans Zondervan
Managing Director
Van Leeuwen
Czech Republic



Lajos Siebel
Managing Director
Van Leeuwen Hungary



Miroslaw Aszyk
Managing Director
Van Leeuwen Poland



Andriy Markov
Managing Director
Van Leeuwen Ukraine



Marius Metz
Director Van Leeuwen
Slovakia



Emil Sirovina
Managing Director
Van Leeuwen Slovenia



Ruggero Nestri
Regional Managing
Director South-Eastern
Europe



Irina Beltermann
Managing Director
Van Leeuwen Romania



Gazi Dilekci
Commercial Director
Van Leeuwen Turkey



Fulya Atan
Finance Director
Van Leeuwen Turkey



Ruud Langeveld
Regional Managing
Director Van Leeuwen
Asia



David Abernethy
Regional Commercial
Manager Asia



Pieter Buijs
General Manager
Van Leeuwen Malaysia



Michael van Etten
General Manager
Van Leeuwen Thailand



Weeraphong Nirasrop
Managing Director
Van Leeuwen
Distribution Thailand



Fenti Kertasari
Managing Director
Van Leeuwen
Distribution Indonesia



Dennis Yap
General Manager
Van Leeuwen China



Hadi Nassar
Regional General
Manager Van Leeuwen
Gulf



Emmanuel Zammit
Managing Director
Van Leeuwen Australia



Graham Watts
General Manager
Van Leeuwen Canada



George Kubove
General Manager
Van Leeuwen USA



Ted Klaver
Managing Director
Global Project
Organization



Martijn van Eck
European Procurement
Manager



Ivan Luc
European Procurement
Manager



André Dekker
Global Contract
Director



Matthijs Erwich
Corporate Director IT



Christian Meier
Global Program
Director S/4 HANA



Ulrika Rydén
Corporate Sustainability
Manager



Eric Veraart
Corporate Director
Supply Chain & QSE



Dominik Esser
Manager Production
Equipment



Dennis Wittmann
Manager SHEQ



Robert van der Borden
Group Director Finance
& Reporting



Eline van Haeren
General Counsel



Andre Bouwer
Head of Compliance



Ingrid den Hartog
Manager Corporate
Communications



Fred Nauta
Corporate Manager HR

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Van Leeuwen Pipe and Tube Group

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