

CME 2026 ISLAND OF IRELAND

ISLAND OF IRELAND DISTRIBUTION LEADERSHIP



PATRICK ATKINSON

CHIEF EXECUTIVE OFFICER
ISLAND OF IRELAND DISTRIBUTION

JOINING YEAR

Joined Chadwicks Group in 2015 and appointed CEO in 2017

EXPERIENCE OVERVIEW

30+ years in the building materials industry

AT A GLANCE

Island of Ireland represents our home market generating €1.25bn of revenue

MARKET ENTRY 1902	FY25 REVENUE €1.25BN
% GROUP FY25 REVENUE 42.5%	FY25 EBITDA €173.4M 13.9% margin
LOCATIONS 120+	FY25 EBITA €129.4M 10.3% margin
HEADCOUNT 3,600+	



TRADE FOCUS

Established 1902¹



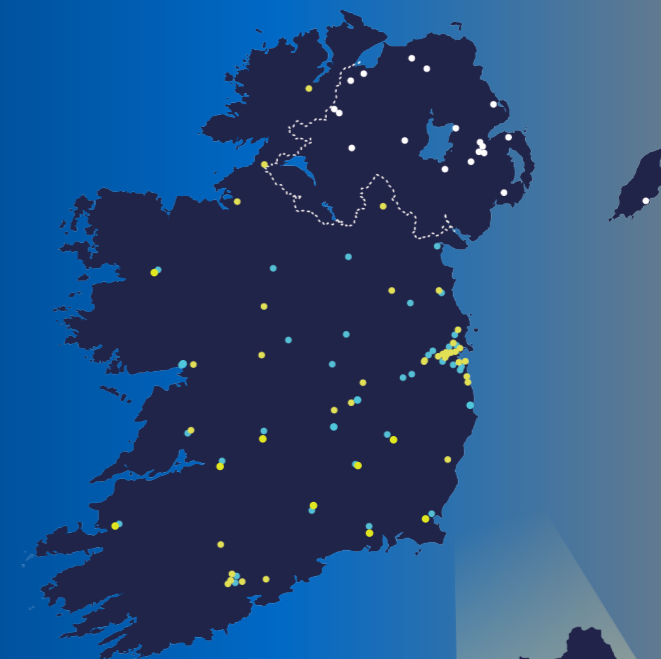
TRADE FOCUS

Acquired 1990



CONSUMER FOCUS

Established 1987



- CHADWICKS GROUP
- MACBLAIR
- WOODIE'S





MACROECONOMIC OVERVIEW

Ireland experienced strong modified GNI* growth from 2022-25, and house completions are expected to grow at 9.0% p.a. through to 2028F

Key: Actual Forecast CAGR

CHART 1: MODIFIED GNI* (€BN in 2022 prices, 2024-27F)

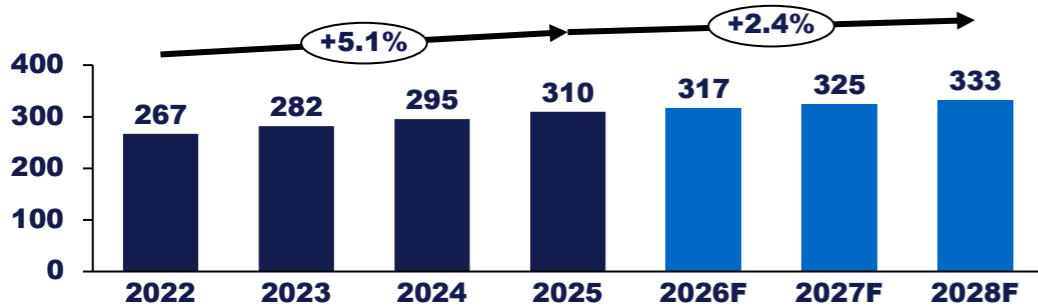
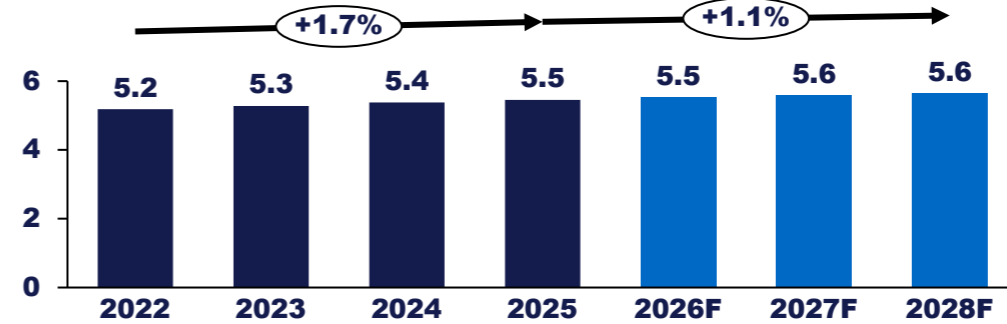


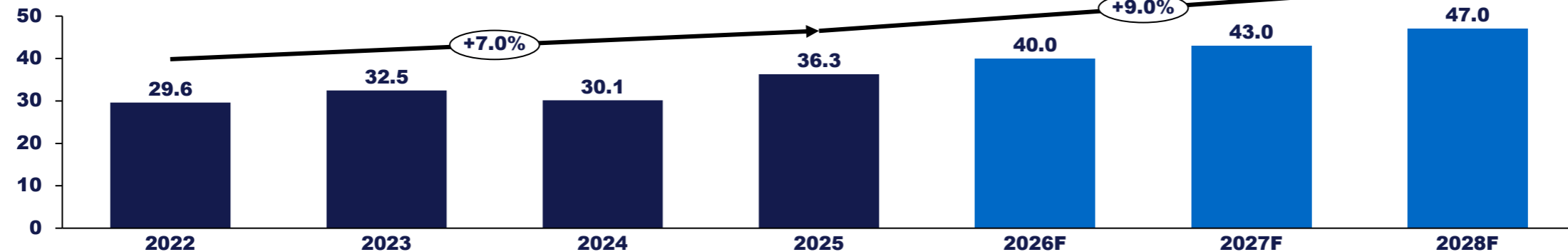
CHART 2: POPULATION (M, 2022-28F)



POPULATION CHANGE FORECAST (% , 2025-35)

10.2%

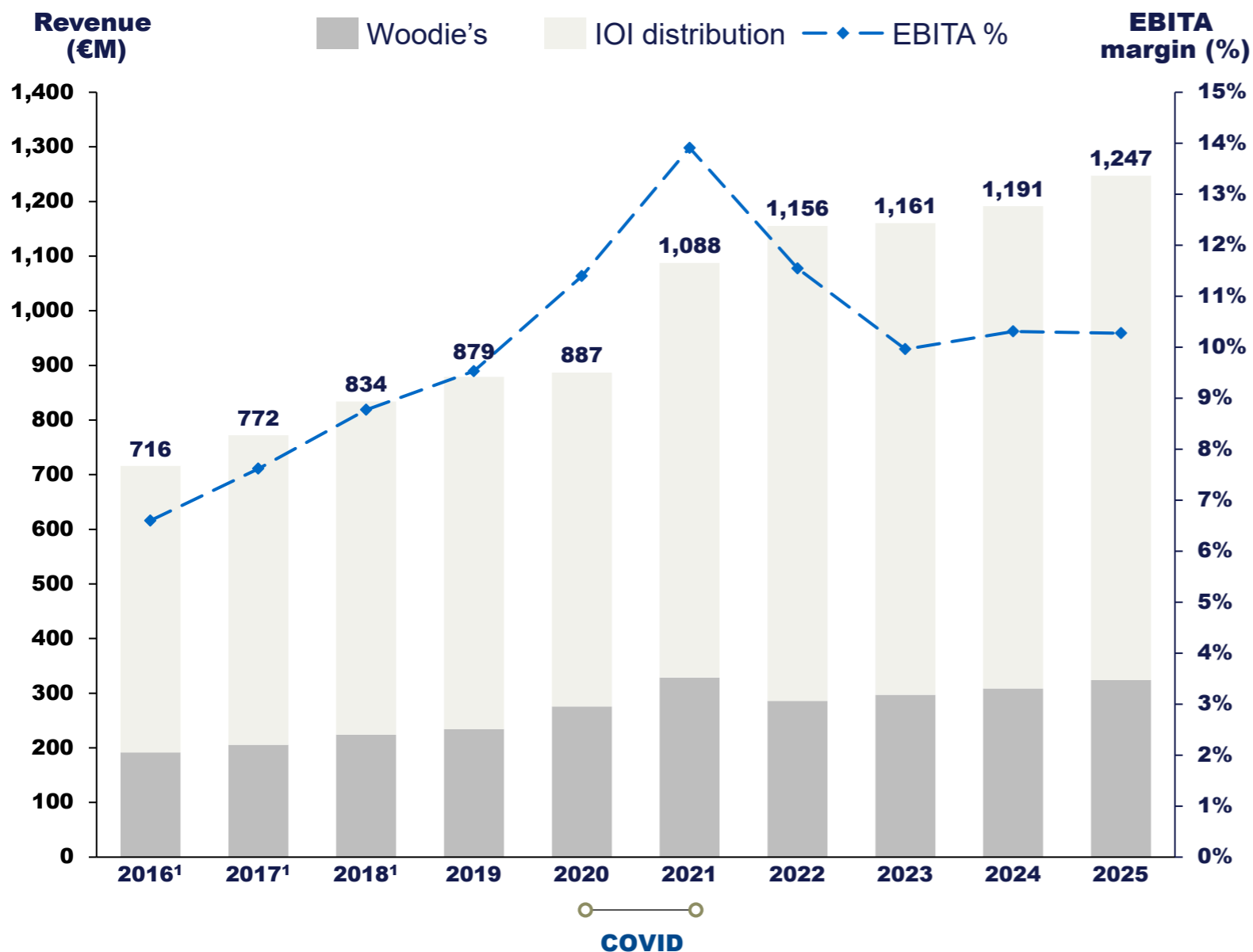
CHART 3: HOUSING COMPLETIONS ('000, 2022-28F)¹



% HOUSING STOCK BUILT BEFORE 2000

78%

HISTORICAL FINANCIALS



**Strong recovery
since GFC**

**Margin peak at
~14% in COVID**

**Sustainable
margin of ~10%**

CURRENT TRADE FOCUSED OPERATIONS

ANNUAL SALES (FY2025)

€923M

85% CHADWICKS GROUP
15% MACBLAIR

HEADCOUNT

2,000+

NUMBER OF BRANCHES

88

NUMBER SKUS SOLD

200K+



COMPREHENSIVE PRODUCT OFFERING TO THE TRADE



HOW WE WIN

What underpins our position as the leading Island of Ireland distributor of building materials

-  **Leveraging buying scale & Island of Ireland synergies**
-  **Offer most comprehensive product range**
-  **Engaged & highly knowledgeable colleagues**
-  **Optimise processes to drive down costs**
-  **Flexibility in formats (small, pop-up, omnichannel etc.)**
-  **Nationwide branch network with opportunity to grow further**

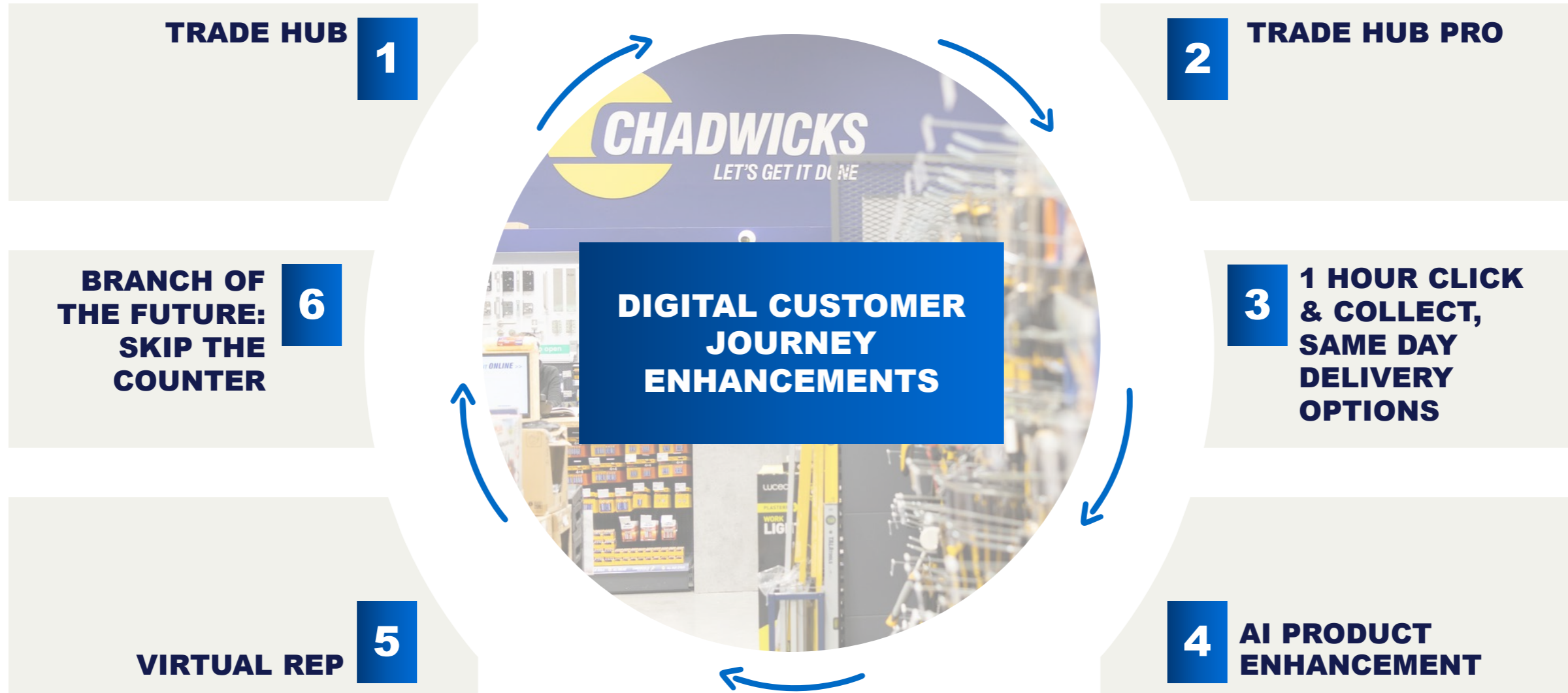


STRATEGY & EXECUTION

Performance is driven by growth, disciplined mix management, and productivity focus

KEY LEVERS	GROWTH	CATEGORY MIX & MARGIN LEVERS	COST AND PRODUCTIVITY
FOCUS	<p>CUSTOMER GROWTH</p> <p>Driving growth across volume, mix, formats and cross-border brand expansion</p> <p>Key initiatives include:</p> <ol style="list-style-type: none"> 1) Digital 2) Category management 3) Common platforms 4) Branch and support office of the future 	<p>RETURNS-LED GROWTH</p> <p>Pricing excellence</p> <p>Product / customer mix</p> <p>Customer / rebate tiering</p> <p>Market intelligence</p>	<p>OPERATIONAL EXCELLENCE</p> <p>COGS, Procurement</p> <p>Transport efficiencies</p> <p>Fixed cost leverage</p> <p>Removing paper-based systems</p>

CHADWICKS' DIGITAL JOURNEY

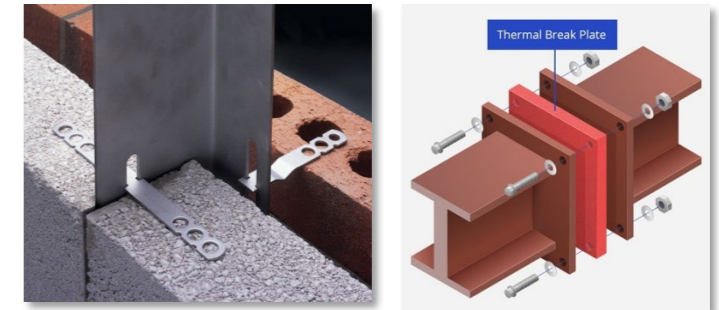
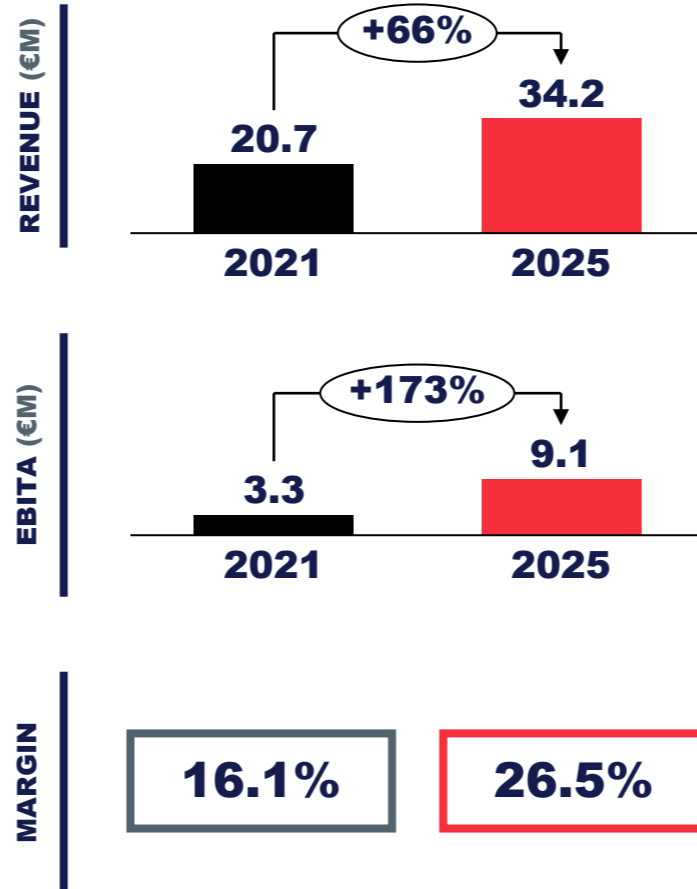


STRATEGY TO VALUE CREATION: CASE STUDY

EVIDENCE OF UNLOCKING SYNERGIES



- Acquired Sitetech in 2022, a specialist early-stage concrete and masonry accessory business
- Higher-margin product offering, mainly non-core building material products
- Customer base is large contractors, allowing early-stage entry on site
- Sitetech has become the supplier of core concrete and masonry accessories to Chadwicks Group
- Growth in sales and margin driven by shift to residential and masonry



LOOKING FORWARD

We will continue to grow our trade-focused businesses, with strategic investments broadening and deepening our offering

EXCEPTIONAL PLATFORM TO SERVE TRADE CUSTOMERS

Current operating margin is sustainable



**White space for new
branches and M&A**



**Favourable macroeconomic
tailwinds**



**Digital
transformation**

**The IOI distribution business will continue to grow organically and through strategic acquisitions,
whilst further digitalising operations**

WOODIE'S LEADERSHIP



DAMIEN DWYER

CHIEF EXECUTIVE OFFICER
WOODIE'S

JOINING YEAR

Joined Woodie's in 2013 as
Commercial Director, appointed
CEO in 2022

EXPERIENCE OVERVIEW

15+ years in retail



PIPPA CASEY

DIGITAL AND MARKETING DIRECTOR
WOODIE'S

JOINING YEAR

Joined Woodie's in June 2024

EXPERIENCE OVERVIEW

10+ years delivering
e-commerce sales growth

CURRENT OPERATIONS

Woodie's is Ireland's leading omnichannel DIY, Home & Garden retailer

Annual sales (FY25)

€324M

Number of products sold

>30k

Number of employees

1,500

Selling space

1.4M ft²

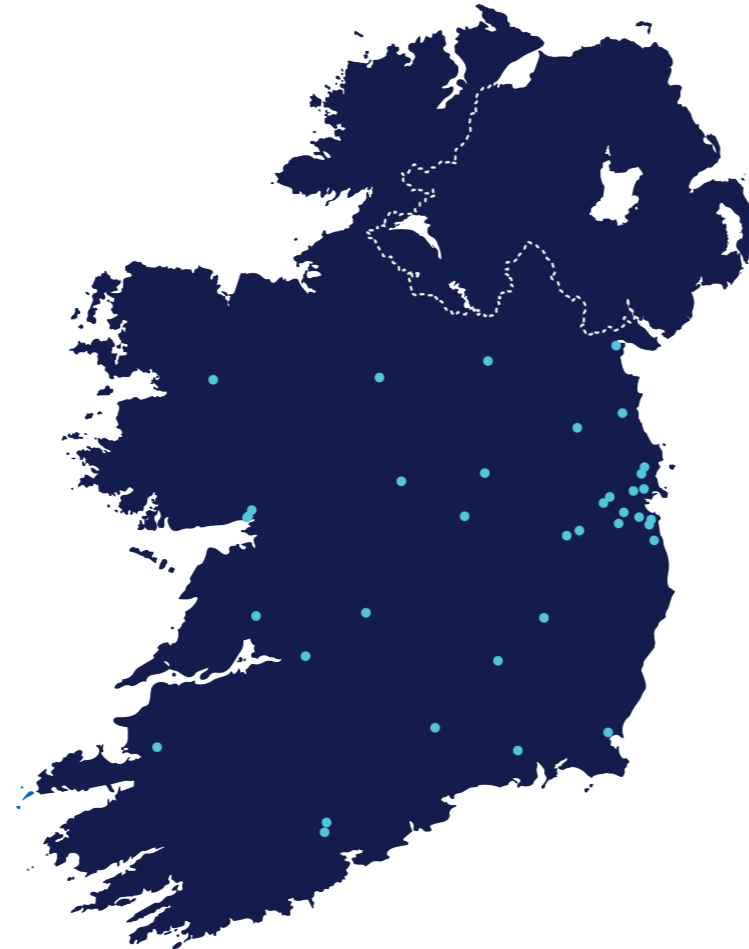
Stores

36

National brand awareness

97%

STORE FOOTPRINT

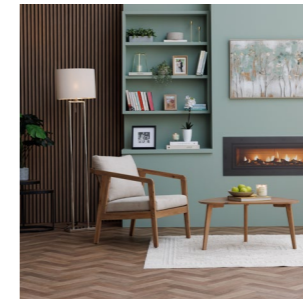


HOME IMPROVEMENT OFFERING

DIY



HOME



GARDEN



HOW WE WIN

Winning formula

-  **Known and loved Irish brand**
-  **Nationwide coverage and e-commerce platform**
-  **Large-format anchor presence in prime retail parks**
-  **Range authority and innovation**
-  **High customer footfall (17.4M p.a.)**
-  **Well-developed sourcing model**
-  **Highly trained and engaged colleagues**
-  **Strong employer brand – ranked fourth in the Irish market**

Competitive advantages

BRAND STRENGTH



DIGITAL STRENGTH



SUPPLY CHAIN



STORES AND FORMAT



RANGE AUTHORITY AND INNOVATION



EMPLOYER VALUE



STRATEGY AND EXECUTION

KEY LEVERS	MARKET-LEADING CORE & ORGANIC GROWTH	OMNICHANNEL GROWTH ENGINE	VALUE AND MARGIN DISCIPLINE	SCALABLE PLATFORMS & PRODUCTIVITY	CAPITAL ALLOCATION & EXECUTION STRENGTH
FOCUS	Strong market positions	Customer-led incremental growth	Returns-led growth	Operational excellence	Disciplined capital deployment
	<p>Maintain #1 position in market</p> <p>New store openings</p> <p>Continue range and product development</p>	<p>New incremental revenue channels</p> <p>CRM and loyalty</p> <p>Driving market penetration</p>	<p>Gross margin focus – own brand and exclusive products</p> <p>Better buying with efficient supply chain</p> <p>Focus on delivering customer value</p>	<p>Investment in ERP, supply chain planning and digital platforms</p> <p>Strong operating model</p> <p>Modern well invested store estate</p>	<p>Strong investment plan</p> <p>Clear returns</p> <p>Scalability</p>

DIGITAL INVESTMENT DRIVES VALUE...

UNLOCKING INCREMENTAL VALUE THROUGH OMNICHANNEL SHOPPING

Why

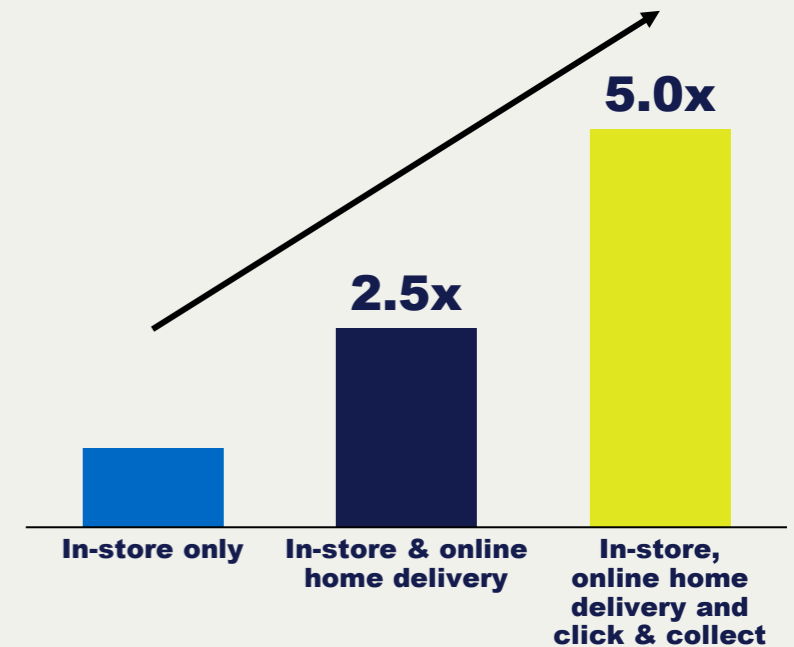
1. Omnichannel customers spend more
2. Woodies.ie is our digital front door (~60% of customers research online before store visits)
3. Driving incremental growth through e-commerce revenue

How we did it

1. Established a scalable technology stack
2. Launched new revenue streams

IMPACT: +44% INCREASE IN DIGITAL REVENUE CHANNELS OVER 24 MONTHS

CUSTOMER SPEND BY FULFILLMENT CHANNEL



...BUT THE DIGITAL INVESTMENT IS NOT DONE YET

OUR STRATEGIC GROWTH DRIVERS

DROPSHIP & MARKETPLACE

CRM & LOYALTY

RETAIL MEDIA

E-COMMERCE PENETRATION

DRIVING OUR NEXT PHASE OF GROWTH THROUGH INNOVATION

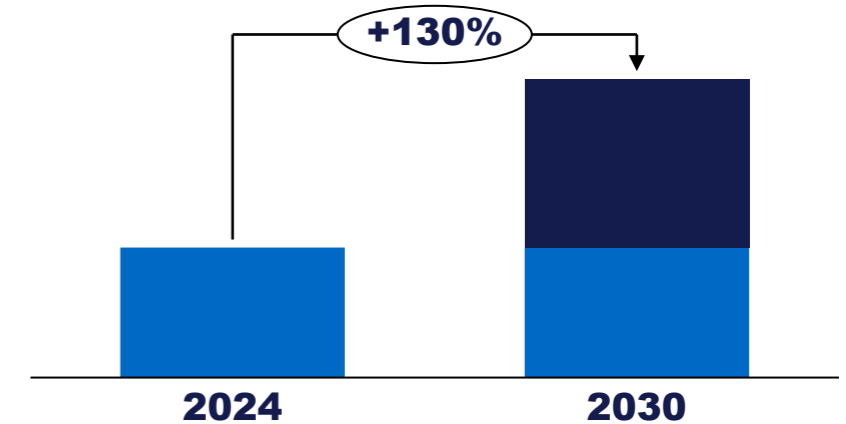
Expand online extended ranges to drive differentiated product

CRM and loyalty capability to drive engagement and lifetime value

Leveraging our scale by turning our stores, website & digital estate into high-value advertising space for brands

Supported by technology investment, transitioning from mobile friendly website to Woodie's App

DIGITAL REVENUE EXPECTED TO 3X ITS SHARE OF BUSINESS BY 2030



Digital sales expected to more than double, underpinned by scalable infrastructure and innovation

LOOKING FORWARD

Strengthen market leadership position through organic growth, white space opportunities and digital investment to continuously enhance the customer proposition

#1 DIY, HOME AND GARDEN RETAILER IN IRELAND

Key takeaways



**MARKET OPPORTUNITY
REMAINS ATTRACTIVE**



**SCALABLE
MODEL**



**DISCIPLINED
GROWTH**

Established market leader with significant growth headroom