BREEDON

MAKING A MATERIAL DIFFERENCE

Breedon Group plc Annual Results 2023

6 March 2024

Forward looking statement

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Agenda

Group highlights	Financial review	Operational review	Acquisition of BMC	Summary and Outlook	Q&A
Rob Wood, Chief Executive Officer	James Brotherton, Chief Financial Officer	Rob Wood	Rob Wood James Brotherton	Rob Wood	

Record revenue and Underlying EBIT

Full year results ahead of upgraded expectations

Highlights

Resilient end-markets

Long-term structural growth drivers remain in place providing supportive backdrop to mitigate short-term headwinds

Managing factors within our control

Disciplined focus on carefully managing pricing, commercial and operational excellence

Investing for growth

Three earnings enhancing acquisitions delivered and record level of organic investment

Vertically-integrated model and sustainable growth strategy delivered again

Sustainable asset-backed growth model

Sustainability framework delivers tangible progress

Highlights

Sustain

Tangible progress; safety outcomes improved, targets submitted to SBTi, CDP rating awarded, carbon emissions reduced, Peak Cluster launched

Optimise

Excellence programmes launched; site optimisation and targeted investment to maximise efficiency, EPOD unlocking cash flow and sustainability benefits

Expand

Delivering balanced growth; mineral asset base and capital investment sustained, three earnings enhancing transactions completed, third platform commenced

Breedon is resilient and agile; well-positioned for market recovery and growth

Financial review

2023 Financial Highlights

Record underlying EBIT and increased dividend payout

Revenue

£1,488m

2022: £1,396m

+7%
Revenue growth

Underlying EBIT

£156.2m

2022: £155.0m

10.5%
Margin
2022: 11.1%

ROIC

9.9%

2022: 10.8%

20%
Effective Tax Rate
2022: 16%

Free Cash Flow

£94.8m

2022: £68.7m

39%
Conversion from EBITDA
2022: 29%

Net Debt

£169.9m

2022: £197.7m

0.5x
Covenant Leverage
2022: 0.7x

Dividend
per share

13.5p

2022: 10.5p

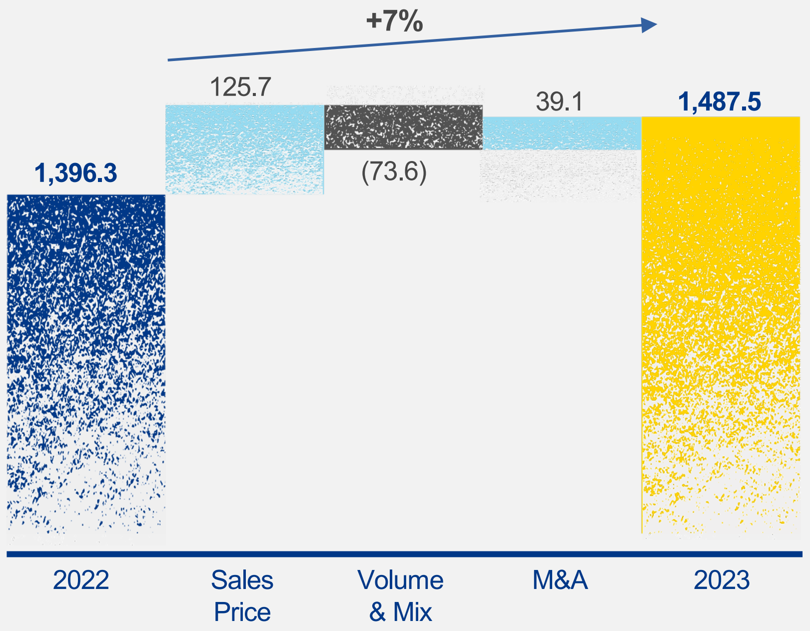
40%
Payout ratio

Notes: **Underlying** results are stated before acquisition-related expenses, property gains and losses, amortisation of acquisition intangibles, AIM to Main Market costs and related tax items. **ROIC** is Post-tax return on average invested capital, calculated as underlying earnings before interest, divided by average invested capital. **Covenant Leverage** is as defined by the Group's banking facilities. This excludes the impact of IFRS 16 and includes the proforma impact of M&A.

Revenue and EBIT bridges

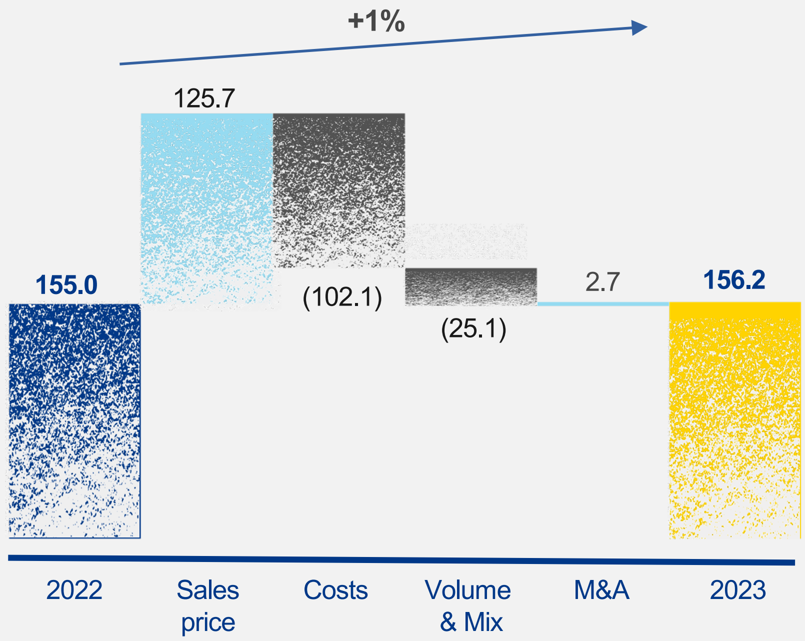
Price tailwinds and M&A offset lower volumes

REVENUE BRIDGE
£ million



+9% | -5% | +3%

EBIT BRIDGE
£ million



EBIT Margin 11.1% | -60 bps | 10.5%

Divisional contribution

All divisions contributed to 2023 performance

Revenue

	Great Britain	Ireland	Cement	Group
	£1,033.8m	£235.5m	£331.2m	£1,487.5m
2023	1,033.8	235.5	331.2	1,487.5
2022	972.4	226.2	300.7	1,396.3
2021	845.2	225.4	245.6	1,232.5
2020	602.8	189.3	197.2	928.7

Underlying EBIT

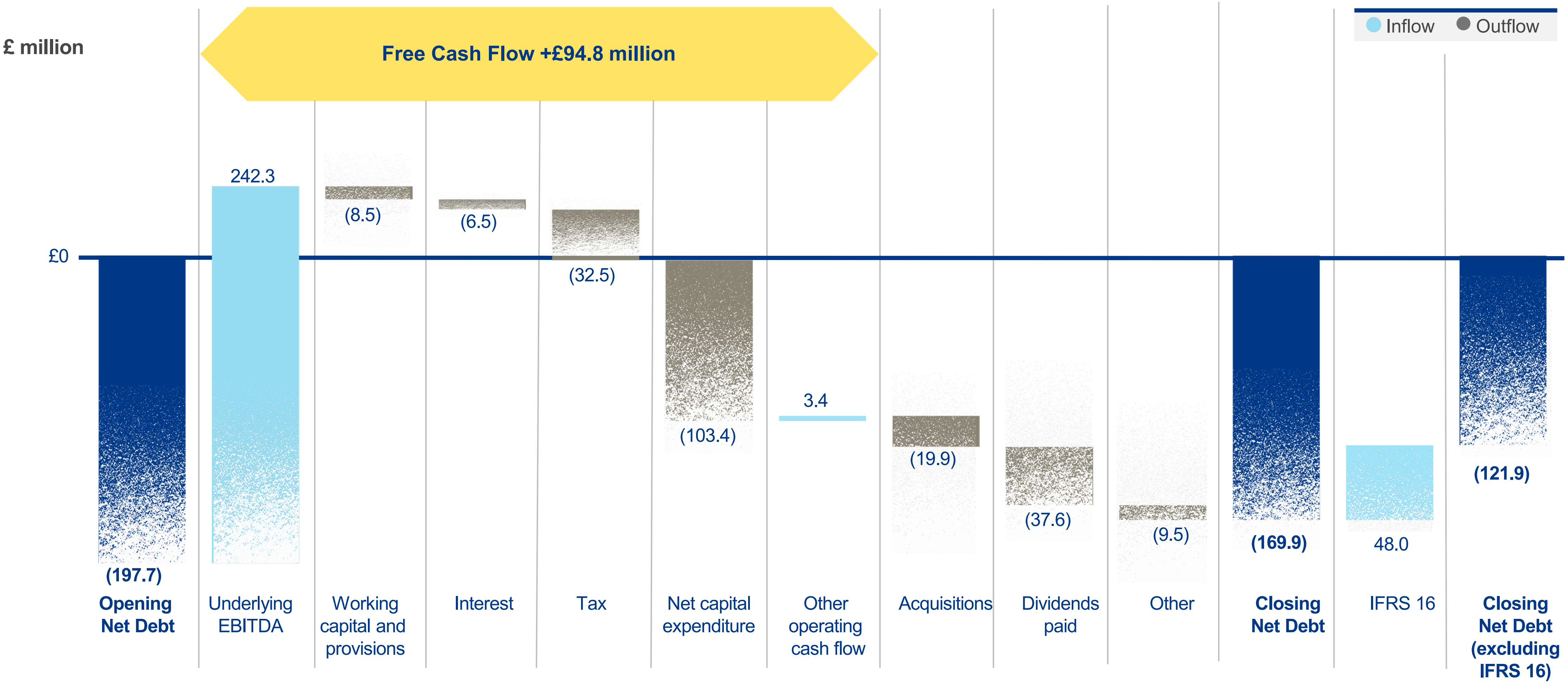
	Great Britain	Ireland	Cement	Group
	£86.4m	£29.0m	£55.2m	£156.2m
2023	86.4	29.0	55.2	156.2
2022	86.4	28.3	52.1	155.0
2021	74.3	28.2	41.6	133.6
2020	33.5	20.5	31.7	76.5

	Great Britain	Ireland	Cement	Group
Margin	8.4%	12.3%	16.7%	10.5%
	-50 bps vs 2022	-20 bps vs 2022	-60 bps vs 2022	-60 bps vs 2022

Note: Divisional revenue and EBIT excludes eliminations, head office costs and JV/Associates. Certain cement related activities which were included in GB in 2020 were transferred to our Cement segment in 2021.

2023 Net debt and cash flow

Further deleveraging alongside continued investment



Delivering our strategy

Further progress towards our strategic goals

	Growth	Profitability	Cash flow	Financial discipline	Returns	Dividend
Targets	Outperform our markets	EBIT margin 12% - 15%	FCF conversion >50%	Covenant Leverage 1x – 2x	ROIC >10%	Payout ratio 40%
Outcomes						

Note: **FCF conversion:** Free Cash Flow relative to Underlying EBITDA. **Covenant Leverage** as defined by the Group's banking facilities - excludes the impact of IFRS 16 and includes the impact of M&A. **ROIC:** Post-tax return on average invested capital, calculated as underlying earnings before interest, divided by average invested capital. **Payout ratio** calculated with reference to Adjusted Underlying EPS.

Operational review

UK market; finding a floor

Construction activity to stabilise from lower levels

UK GDP; weak but resilient

- UK GDP +0.1% in 2023
- In technical recession in the second half

UK construction market softened in 2023

- Construction output estimated 6.4% reduction in 2023
- Infrastructure and industrial remain above pre-covid levels

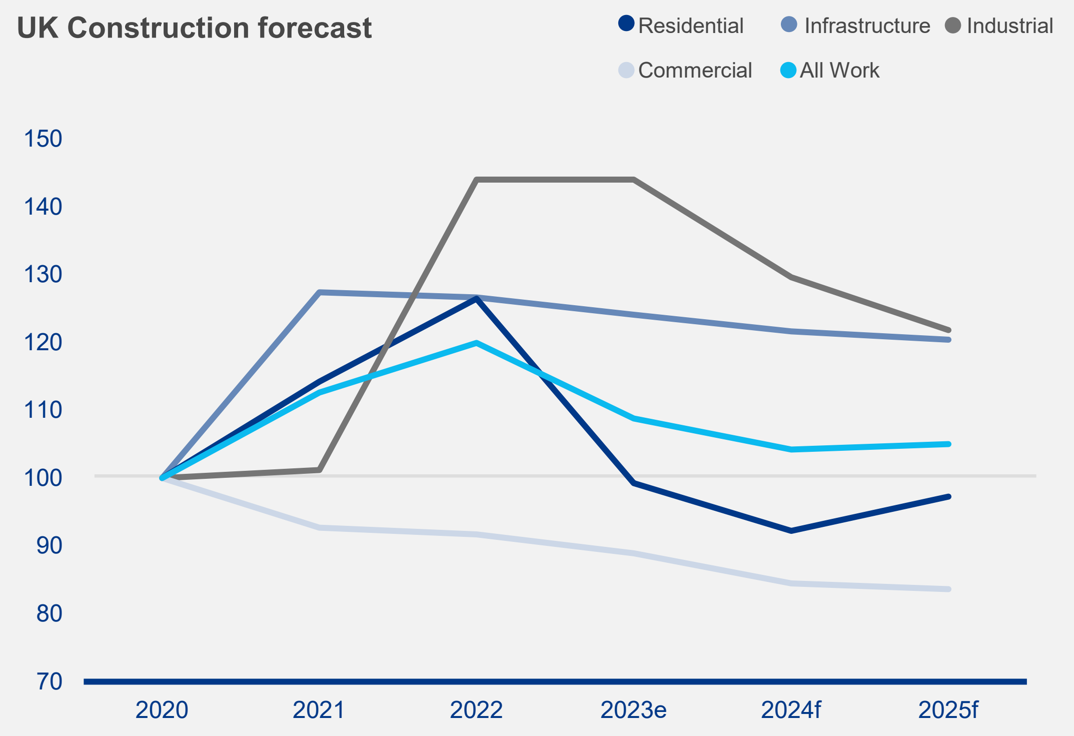
Mineral products volumes declined

- Volumes moderated for a second consecutive year

Construction PMI; expectations improving

- December 2023 Construction PMI 46.8; off 2023 trough
- Business activity expectations improved

Source: ONS, CPA, MPA and S&P Global.



Source: CPA.

RoI market; soft landing

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Construction activity normalising

Modified Domestic Demand stablising

- Estimated MDD growth 2.2%
- Growth forecast to reaccelerate

Construction output supported by housing

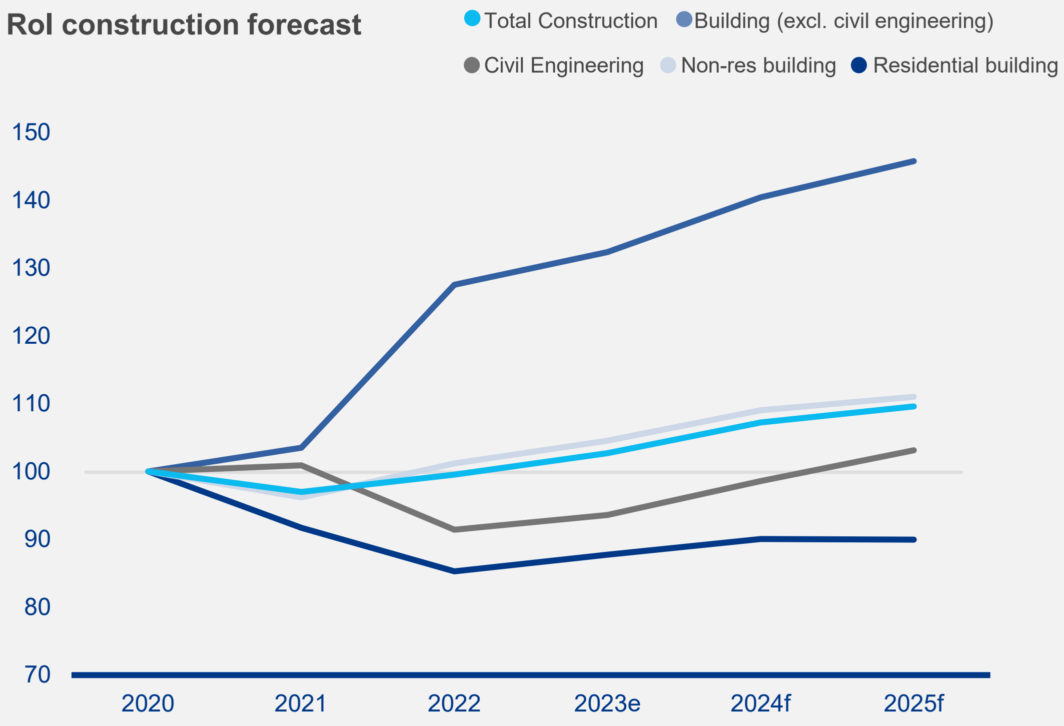
- Construction output estimated to have grown at 3.2%
- Residential and civils providing support

Construction PMI in negative territory

- December Construction PMI 45.1 but confidence improving
- Relative outperformance of residential reflects strong new homes market

Source: CSO, Euroconstruct and BNPPRE.

RoI construction forecast



Source: Euroconstruct.

Great Britain

Solid performance in softening markets

Solid performance

- Successfully navigated challenging market conditions to grow revenue and maintain earnings

Volumes moderated, pricing remained robust

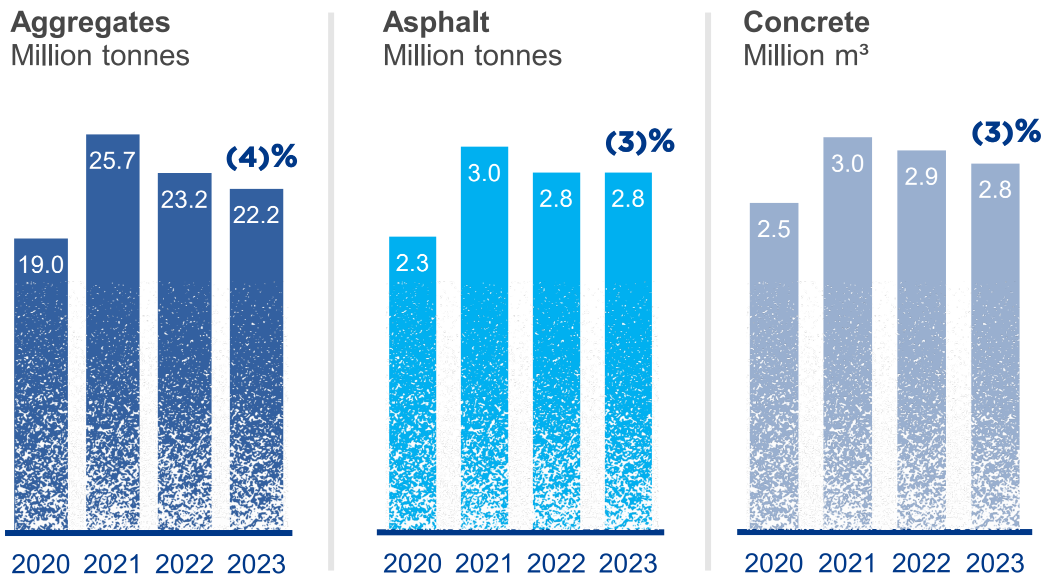
- Volumes reflect softening market and budget constraints
- Pricing supported by structural demand and supply dynamics, ensuring full cost recovery

Culture of continual improvement

- Reinvigorated self-help measures with tailored operational and commercial excellence programmes
- Improving efficiency through close monitoring and targeted investment

Growing our capability, extending our footprint

- Downstream bolt-on acquisitions with strong sustainability credentials increase pull through of materials



Note: Great Britain 2023 product volumes. Growth rates based on non-rounded volume data.

Ireland

Robust performance in mixed markets

Delivered high-quality service to loyal customers

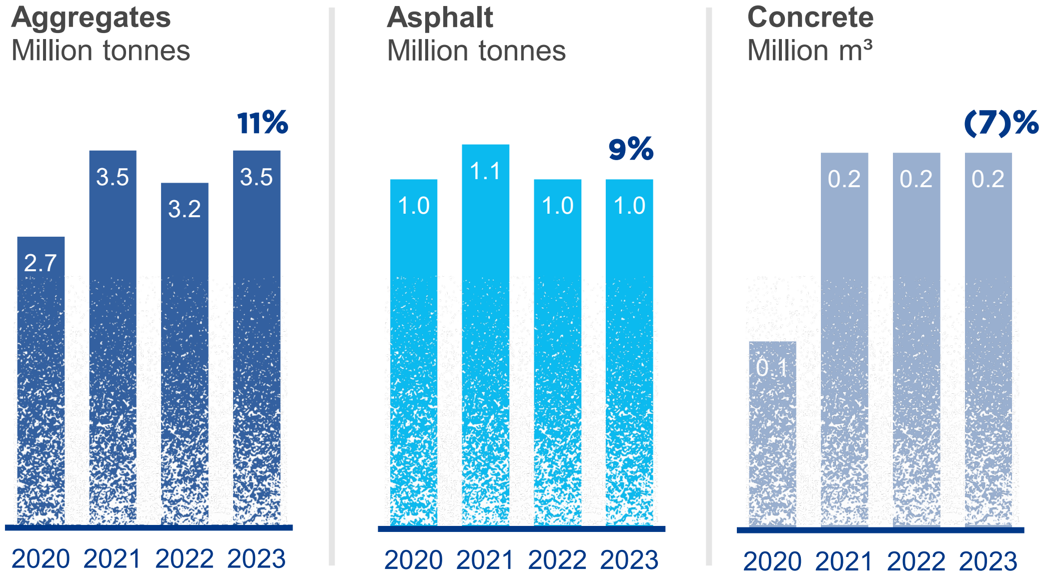
- Market conditions varied by region
- Absence of governing Assembly limited tenders coming to market
- Activity and tendering remained resilient in RoI where we secured high-quality new work

Mineral reserves enhanced

- The earnings enhancing acquisition of Robinsons contributed meaningfully to our asset base
- We added nearly 50m tonnes in 2023 with a pipeline of nearly 40m tonnes at various stages of planning
- Mineral reserves and resources increased by 93m tonnes to 153m tonnes since Lagan acquired in 2018

Breedon Ireland positioned for sustainable growth

- Excellence programme implemented to drive leadership in every market we serve
- Exploring ways to enhance sustainability credentials, meeting growing customer requirements



Note: Ireland 2023 product volumes. Growth rates based on non-rounded volume data.

Cement

Prominent operator, well positioned

Resilient growth

- Revenue +10%; strong pricing offset reduced volumes
- Volumes impacted by GB housebuilding

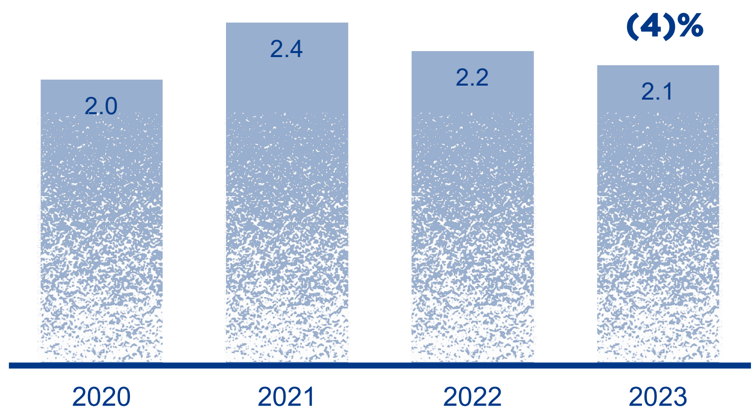
Exceptional reliability

- Rigorous plant maintenance completed on time and to budget
- Hope kiln reliability maintained above 96% for 5th consecutive year, retaining Plant Mastery status

Sustainability enhancing projects

- Alternative fuel utilisation nearing 50%; Kinnegad achieved 79%, exceeding 90% at times
- Reduced clinker content cement c.25% of sales, an increase of over 50% from prior year
- Successful graphene field trials; up to 10% cement compressive strength increase and route to further carbon emissions reduction demonstrated
- Peak Cluster carbon capture and storage project launched at Hope providing clear path to reduce our carbon footprint

Cement
Million tonnes



Note: Cement 2023 product volume. Growth rates based on non-rounded volume data.

$300m Acquisition of BMC Enterprises inc.

Earnings enhancing US entry

Strategic highlights

- Leading US regional ready-mixed concrete, aggregates and building products business
- Headquartered in St Louis, Missouri
- Strong track record of organic and transaction-led growth
- Well-regarded management team, remaining with the business
- Culturally aligned to Breedon, sharing our values
- Well-positioned to benefit from construction growth in the US Mid-West

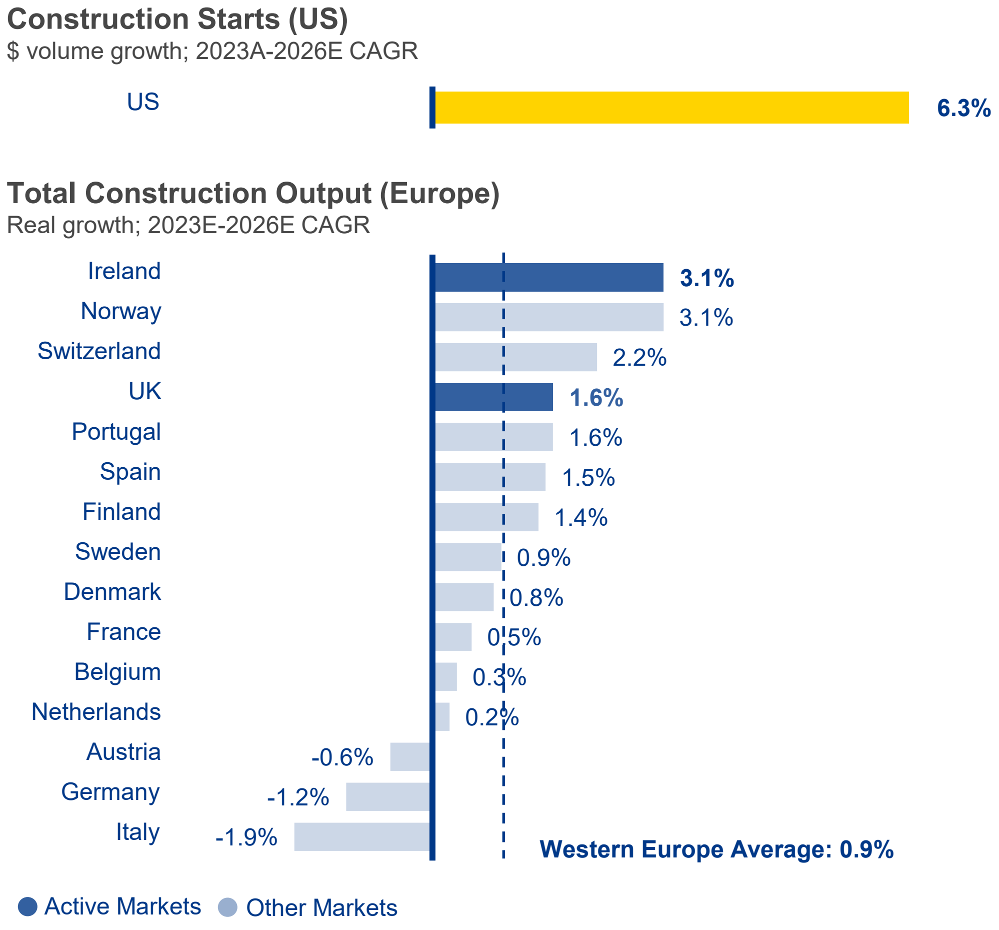
Evaluating a third platform

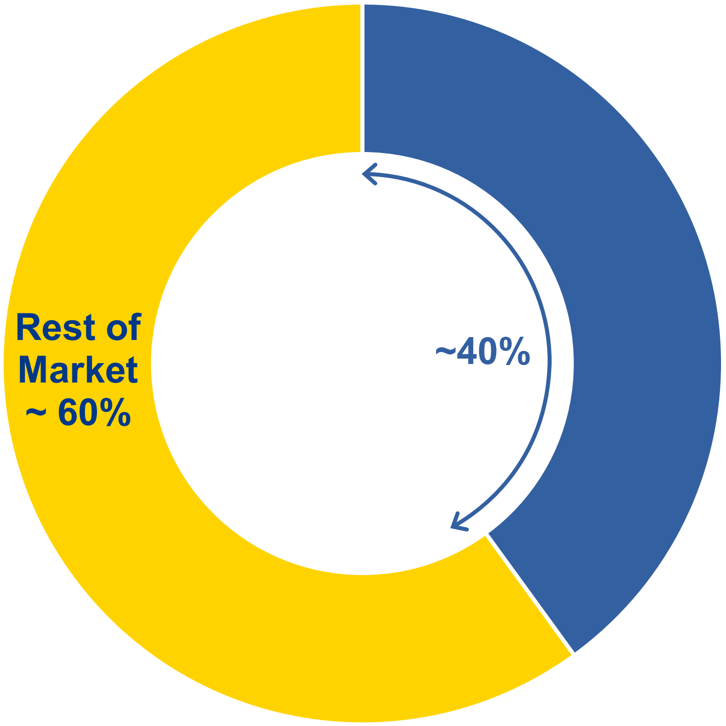
What we said

- Market with long-term growth prospects
- A robust legal system
- A reliable planning regime
- A benign local culture
- With minimal political risk

The US opportunity

High relative growth and highly fragmented





US market remains highly fragmented

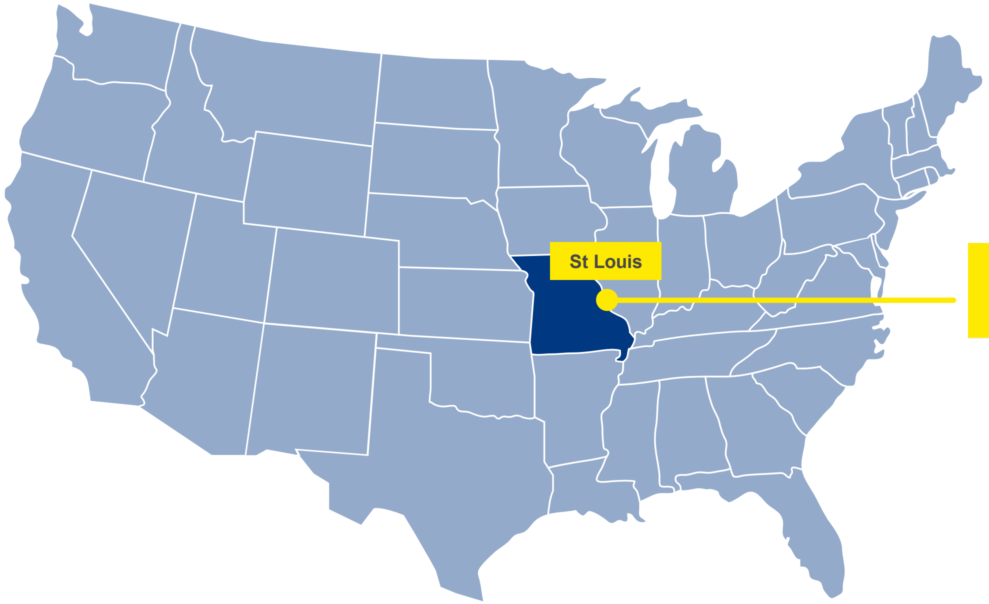
Top 10 comprising global and domestic majors have c.40% market share

Over 5,000 companies managing close to 11,000 operations

Source: Moelis

BMC at a glance

The beachhead for our US platform



BMC ENTERPRISES, INC.

Ready-mixed concrete

2023 m^3: c.740k

Number of Plants: 44

Aggregates

2023 tonnes: c.2.8m

Number of Locations: 12

> 400m tonnes reserves and resources

Building products

Number of Plants: 9

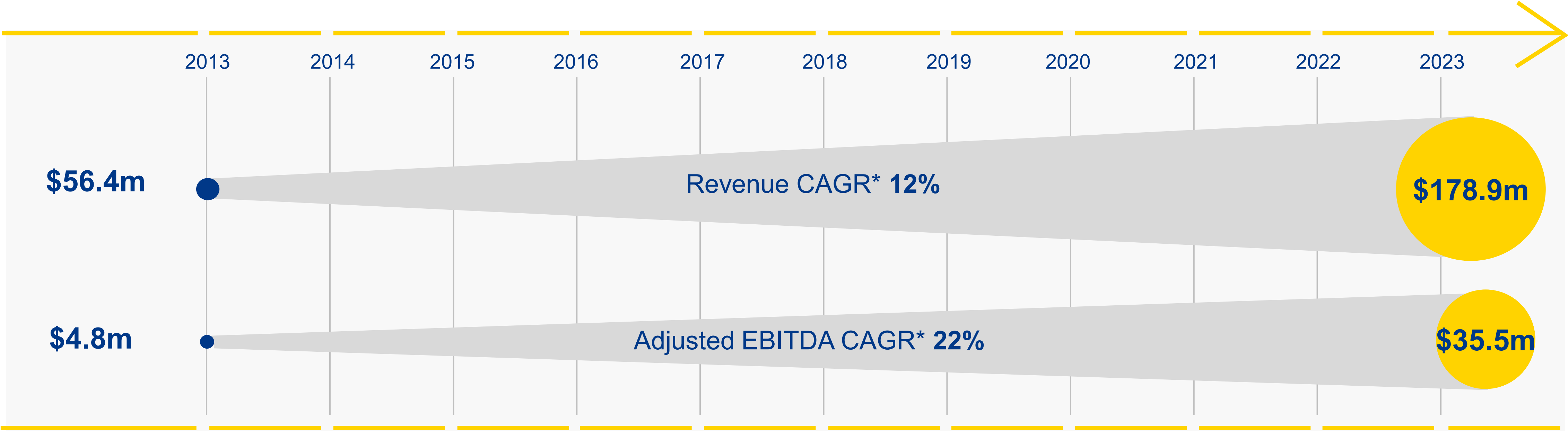
Sales mix

- 50% Residential
- 25% Non-residential
- 25% Non-building

- 76% Ready-mixed concrete
- 12% Aggregates
- 12% Building products

Strong growth track record

A familiar profile



Note: Strafe financials are unaudited and have been prepared under US GAAP.
* CAGR: Compound Annual Growth Rate 2013-2023

The BMC team

Experienced Management who have grown the business

Andy Arnold

CEO Designate

29 years of concrete and aggregates experience

Previously with Holcim

Joined BMC in 2006

John Crumrine

CFO

Experienced CFO

Previously with Sensient Technologies

Joined BMC in 2013

Mark Jacobs

GC and CHRO

Qualified Lawyer and experienced CHRO

Previously with Schenck Markets

Joined BMC in 2022

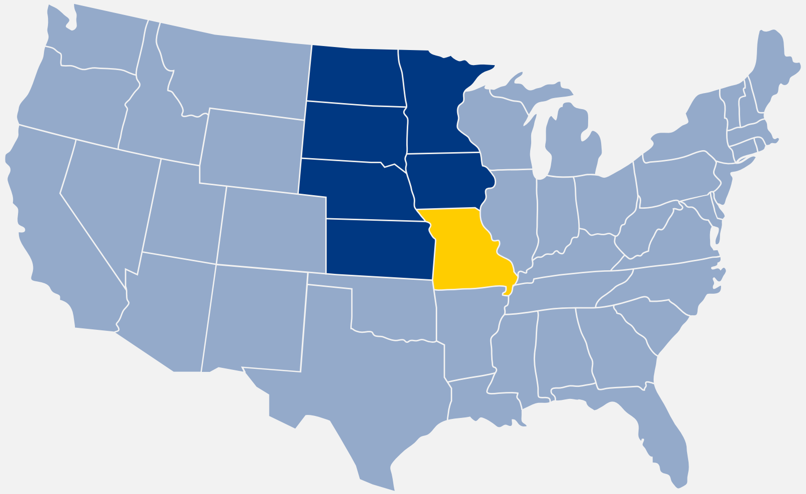
Supported by Nathan McKean as advisory board member

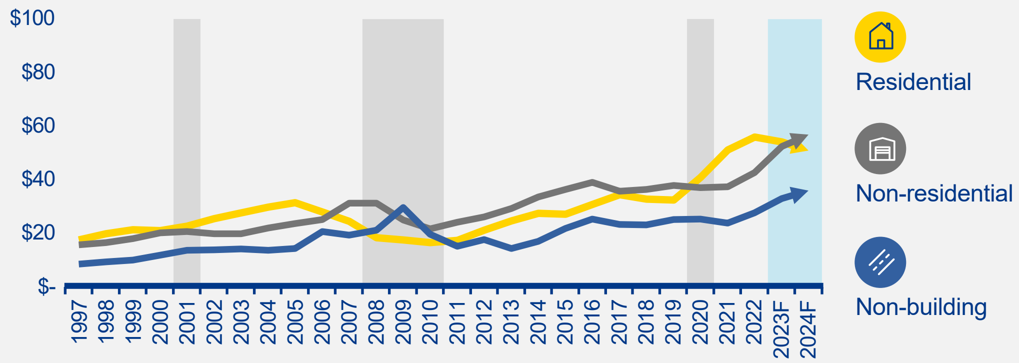
North-West Central construction market

Regional growth outpacing the broad US growth rate

The North-West Central region

Regional growth outpacing National rate





Residential

Structural supply-demand disconnect

- Over a decade of structural under-investment
- Growing population and generational demand of prime homebuying demographic
- Missouri population growth of 5% outpaces Single-Family permit issuance of 2.9% over the last 15 years

Non-residential

CHIPS and Science Act

- Designed to incentivise domestic high-tech research and bring semiconductor manufacturing back to the US
- **$53bn** apportioned for US semiconductor manufacturing and R&D
- North-West Central manufacturing Construction Put-in-Place forecast to grow by 22% to **$16bn** in 2024

Non-building

Federal and State funding programmes

- **IIJA** provides for **c.$6.5bn** in MO over five years to 2026, 26% more on average than the previous five years
- **MoDOT** Highway and Bridge Construction Funding **c.$12.5bn** over five years to 2028, funded by **state fuel tax**

Source: FMI Capital Advisers

Acquisition of BMC

Meeting Breedon's transaction returns criteria

Transaction Highlights

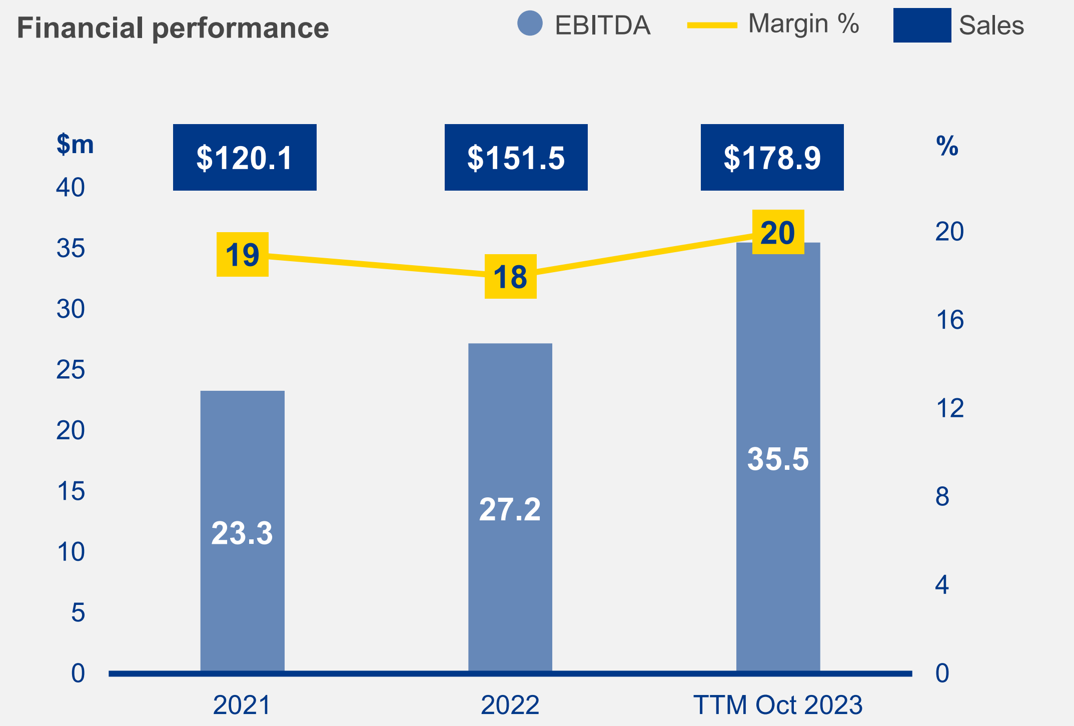
- Enterprise Value - $300m
- Cash Consideration - $285m
- Share Consideration - $15m (held for at least 1 year)
- Customary adjustments and retentions

Key metrics

- Valuation c.8.5x TTM Oct 23 EBITDA
- Earnings enhancing in first full year
- Pro-forma leverage of 1.4x

Timetable

- Announcement – March 6 2024
- Completion – by March 7 2024



Acquisition of BMC

2024 Technical Guidance

BMC Guidance

• Consolidated for 10 months of 2024	
• Transaction costs	c.$15m (non-underlying)
• Integration costs	$2 - 5m (non-underlying)
• Opex investment	c.$2m p.a.
• Shares issued	3.2m
• US tax rate	25%

Group Guidance

• Capital Expenditure	£130m - £140m
• Working Capital	£20m - £30m
• Interest Charge	£25m - £30m
• Group tax rate	c.23%
• Dividend cash cost	c.£45m

Summary and Outlook

Enter 2024 in a strong position

Well-established model and growth strategy

Outlook and Summary

Welcome political clarity
Reinstatement of governing Assembly in Northern Ireland

Economic contributor
Construction drives growth, benefits from cross-party support

Finely balanced outlook
Macroeconomic landscape uncertain near-term

Well-positioned to respond
Deliberate pricing and forward hedging strategies

Supportive end-markets
Infrastructure and housebuilding; confident in medium-term outlook

Return to growth forecast
Construction output growth expected. Breedon growth model well-populated

The Breedon sustainable growth model now across three platforms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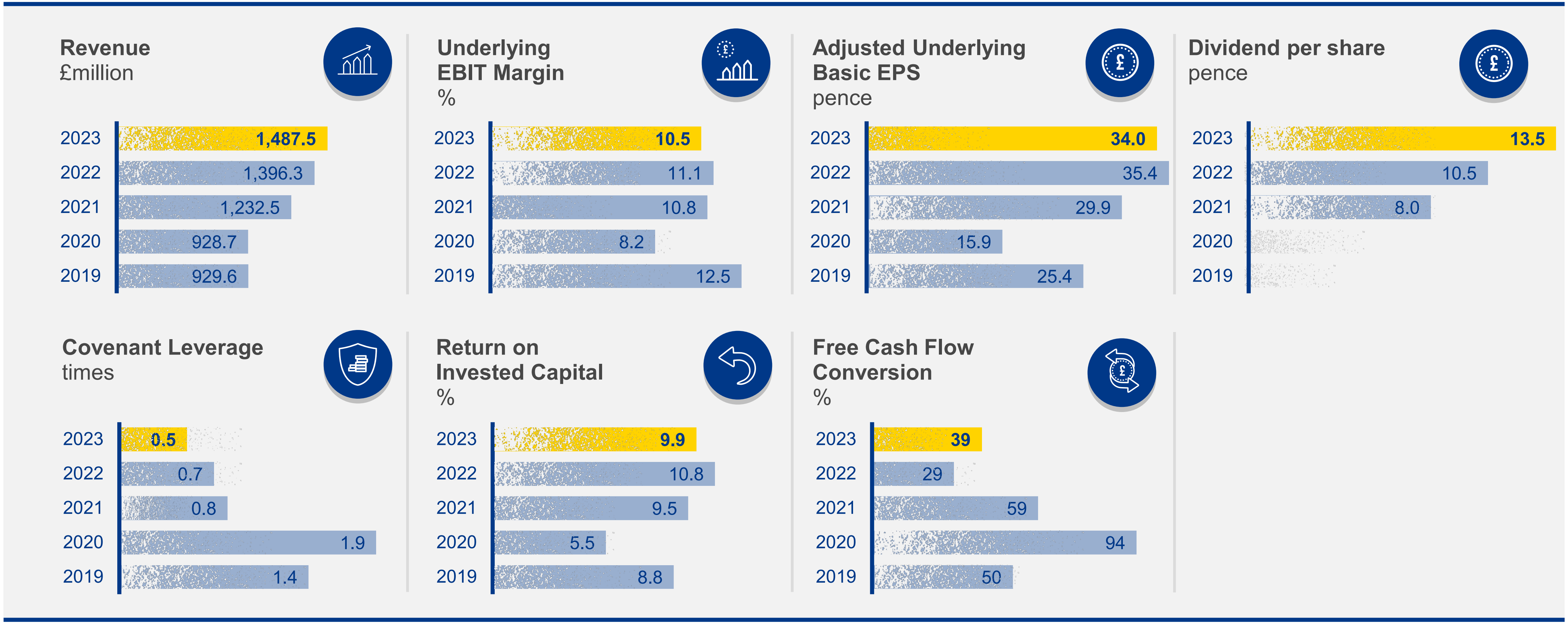
MAKING A MATERIAL DIFFERENCE
Q&A
Breedon Annual Results 2023

Appendix

Breedon Annual Results 2023

Our track record

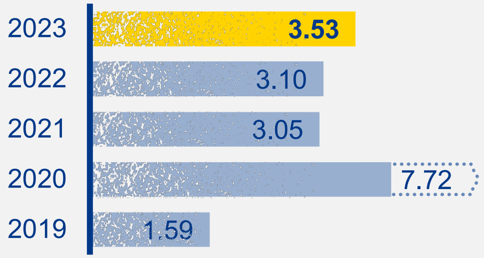
Financial KPIs



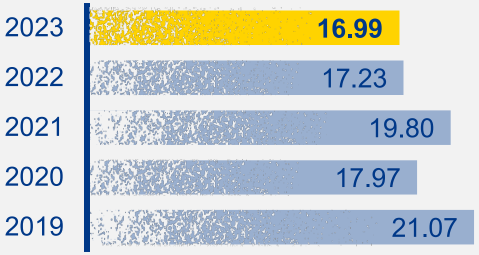
Our track record

Non-financial KPIs

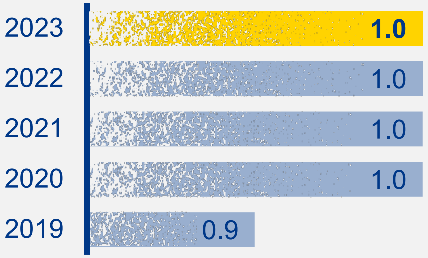
Combined LTIFR
per million hours worked



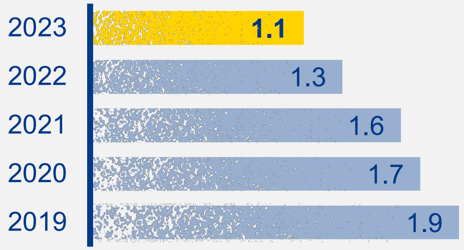
Combined TIFR
per million hours worked



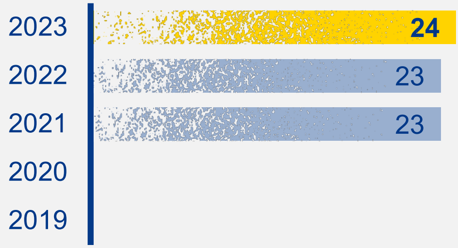
Reserves and resources
billion tonnes



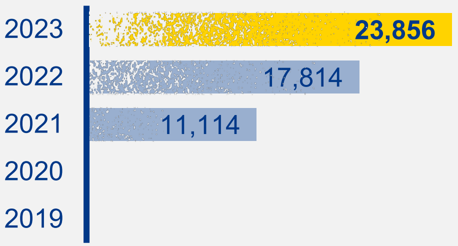
Emissions intensity – Revenue
$kgCO_2e$ per £ revenue



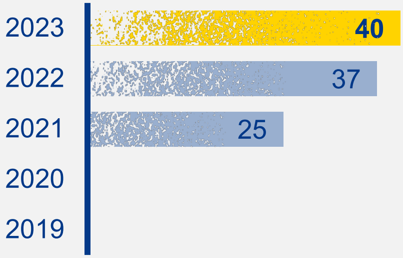
Emissions intensity – Cementitious
% reduction per tonne from 2005 baseline



People positively impacted
number of people per year



Sustainable product sales
% total concrete and asphalt revenue



Balanced financial framework delivering

Benefitting from strategic execution and operational focus

Return on capital broadly in-line with medium-term target

ROIC 9.9%

Proactive investment

ORGANIC
- Replenished reserves and resources
- Productivity enhancing plant and machinery

M&A
- Three bolt-on acquisitions in GB
- Third platform development

Meeting strategic objectives

- Record Underlying EBIT
- Improved Free Cash Flow
- Strong balance sheet

Excess capital distributed

- Dividend payout increased to committed target
- Covenant Leverage 0.5x

2023 Income Statement

£ million	2023	2022
Revenue	1,487.5	1,396.3
Underlying EBITDA	**242.3**	235.0
Depletion & depreciation	(88.7)	(83.5)
Share of associate and joint ventures	2.6	3.5
Underlying EBIT	**156.2**	155.0
Net Interest	(11.3)	(12.2)
Non-underlying items	(10.5)	(7.0)
Profit before tax	**134.4**	135.8
Tax at effective rate	(28.1)	(22.1)
Change in deferred tax rate	(0.7)	(1.1)
Taxation	**(28.8)**	(23.2)
Profit for the period	**105.6**	112.6
Underlying Basic EPS	**33.8p**	35.1p
Adjusted Underlying Basic EPS	**34.0p**	35.4p

2023 Balance Sheet

£ million	2023	2022
Property, plant and equipment	817.2	787.9
Right-of-use assets	45.1	47.1
Intangible assets	520.2	518.2
Investment in associate and joint ventures	14.5	13.7
Inventories	120.1	94.8
Trade and other receivables	228.8	222.4
Total assets (excluding cash)	**1,745.9**	1,684.1
Trade and other payables	(278.6)	(263.8)
Provisions	(94.6)	(86.0)
Current tax payable	(0.1)	(3.8)
Deferred tax liabilities	(92.0)	(89.0)
Total liabilities (excluding interest-bearing loans and borrowings)	**(465.3)**	(442.6)

Net Debt	**(169.9)**	(197.7)
Net Debt excluding IFRS 16	**(121.9)**	(148.4)
Net assets	**1,110.7**	1,043.8

2023 Free Cash Flow

£ million	2023	2022
Underlying EBITDA	242.3	235.0
Working capital and provisions	(8.5)	(33.3)
Net interest paid	(6.5)	(9.0)
Income taxes paid	(32.5)	(25.8)
Net capex	(103.4)	(102.0)
Other	3.4	3.8
Free cash flow	**94.8**	68.7
Acquisition of businesses	(19.9)	(15.1)
Dividends paid	(37.6)	(30.5)
Other	(9.5)	(8.3)
Decrease in Net Debt	**27.8**	14.8

Impact of 5:1 share consolidation

Restated	2019	2020	2021	2022	2023
Adjusted Underlying Basic EPS	25.4p	15.9p	29.9p	35.4p	34.0p
Underlying Basic EPS	25.4p	14.1p	24.8p	35.1p	33.8p
Statutory Basic EPS	23.2p	10.0p	23.2p	33.2p	31.1p
Underlying Diluted EPS	25.3p	14.1p	24.7p	35.0p	33.7p
Statutory Diluted EPS	23.1p	9.9p	23.1p	33.2p	31.0p
Dividends per share	-	-	8.0p	10.5p	13.5p

Original figures	2019	2020	2021	2022	
Adjusted Underlying Basic EPS	5.1p	3.2p	6.0p	7.1p	
Underlying Basic EPS	5.1p	2.8p	5.0p	7.0p	
Statutory Basic EPS	4.6p	2.0p	4.7p	6.7p	
Underlying Diluted EPS	5.1p	2.8p	4.9p	7.0p	
Statutory Diluted EPS	4.6p	2.0p	4.6p	6.6p	
Dividends per share	-	-	1.6p	2.1p	

Disciplined cost management

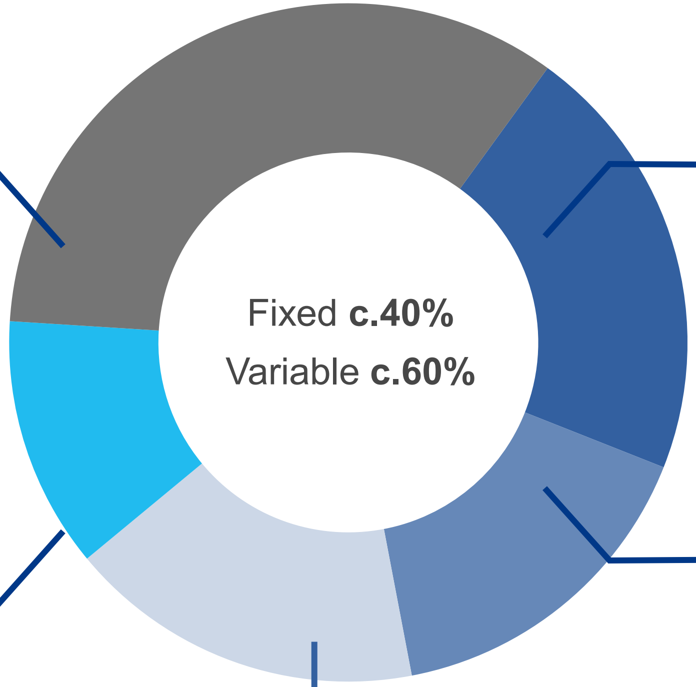
Flexible cost base supported by forward hedging programme

34% - materials & other direct costs

- Includes imported cement, bitumen, subcontractor and direct mineral costs
- Cost inflation moderated during 2023; successfully passed on through pricing

12% - energy, fuels and carbon

- Energy and carbon costs principally due to cement manufacture
- Hedging strategy provides cost certainty and manages risk
- Fuel costs moderated in 2023; however hedges were more closely aligned to market rates than 2022 resulting in £25m additional cost.
- Other fuels purchased at spot and passed on



21% - Other

- Depreciation
- Repairs & maintenance
- Administrative expenses

16% - Workforce

- Highly engaged workforce of 3,900 people
- 80% employee engagement
- 70 new graduates and apprentices
- Higher wage rise in 2023 than in prior years; supporting colleagues with cost of living pressures

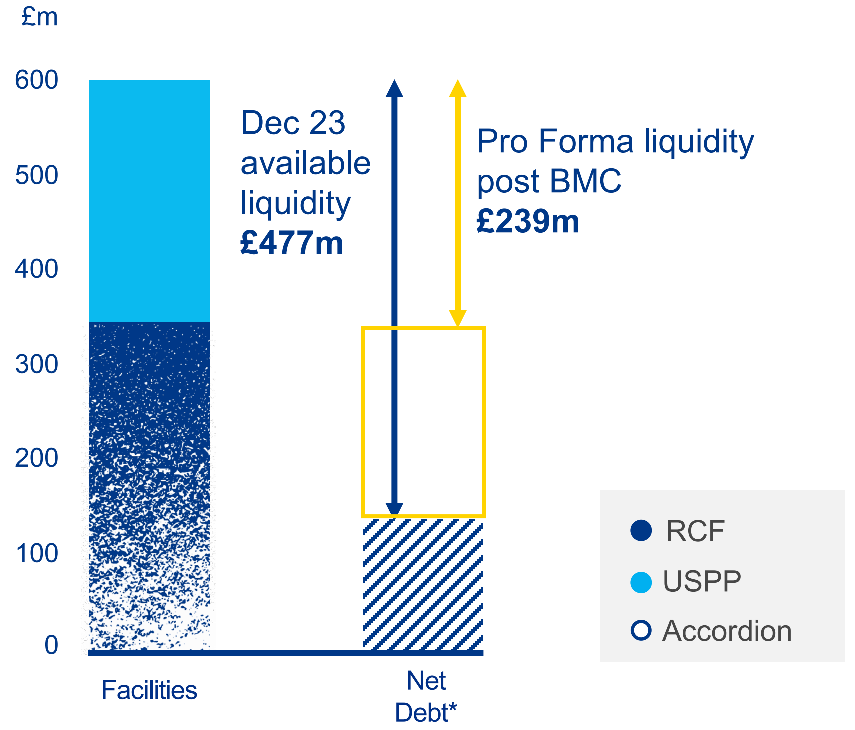
17% - distribution

- Flexible mix of directly employed and outsourced hauliers
- Costs passed on at point of sale

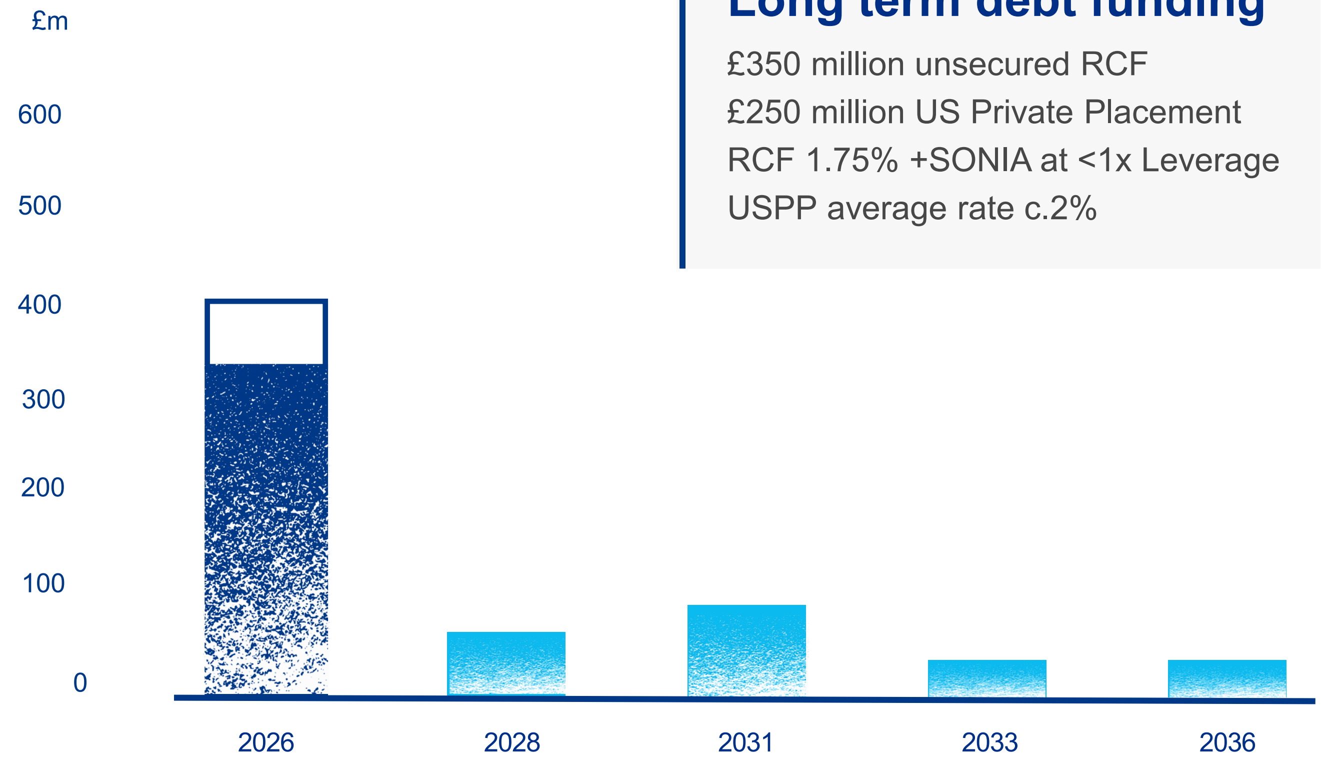
Financing Breedon's Future

Diversified sources of finance at low interest rates

Debt finance positioned to support future growth



Debt Maturity profile



Long term debt funding

£350 million unsecured RCF

£250 million US Private Placement

RCF 1.75% +SONIA at <1x Leverage

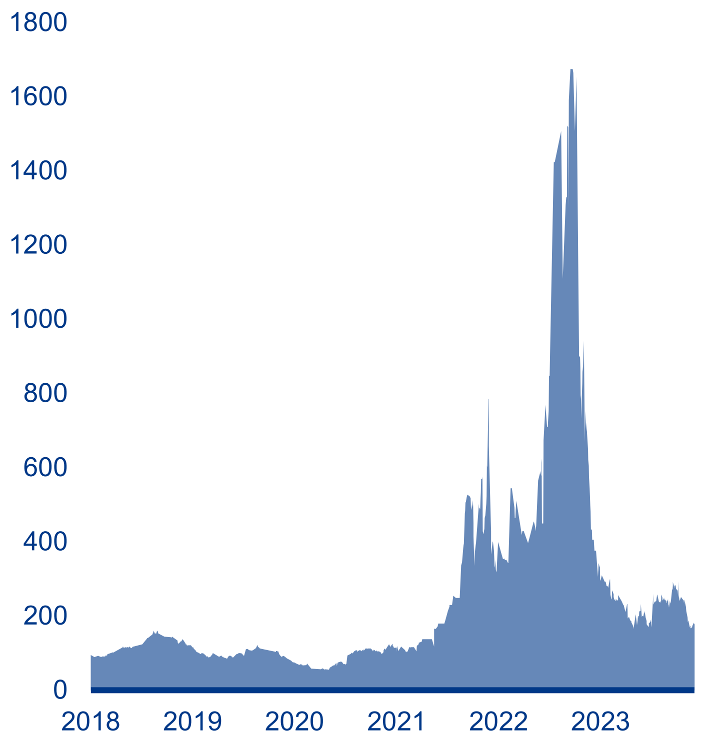
USPP average rate c.2%

* Net debt as at 31 December 2023. Excludes IFRS 16 lease liabilities.

Moderating input cost inflation

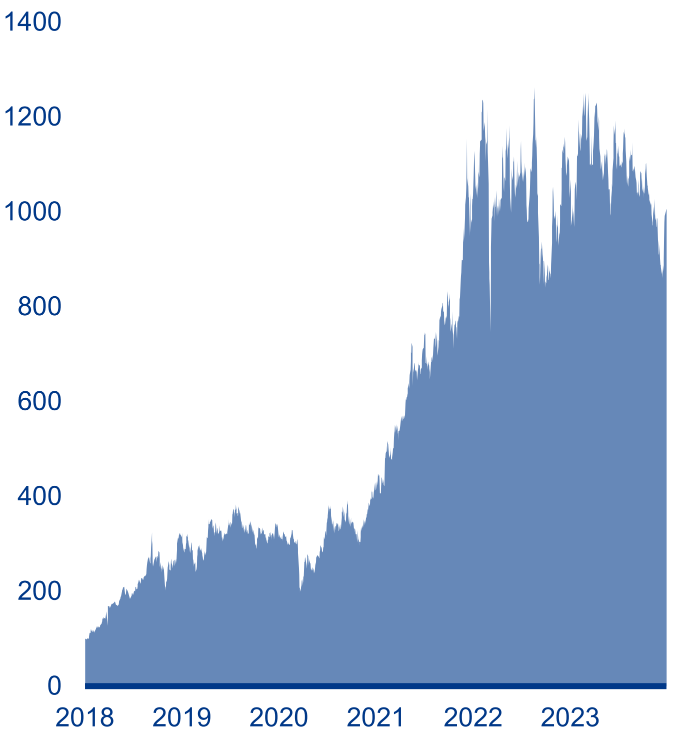
Managed through layered hedging approach and dynamic pricing

UK Electricity



Bitumen

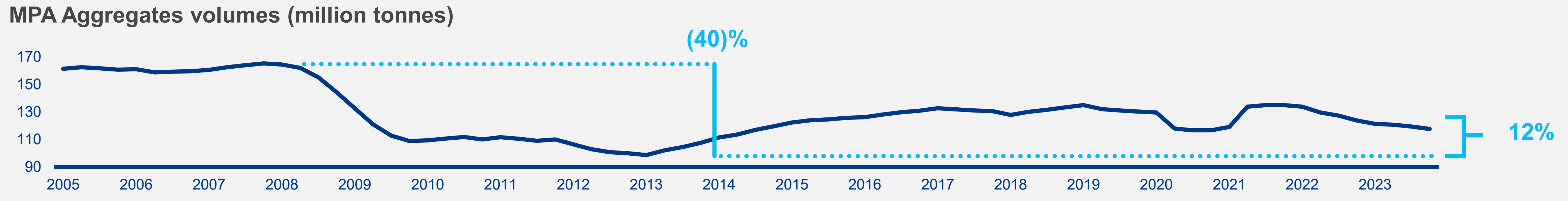
Carbon

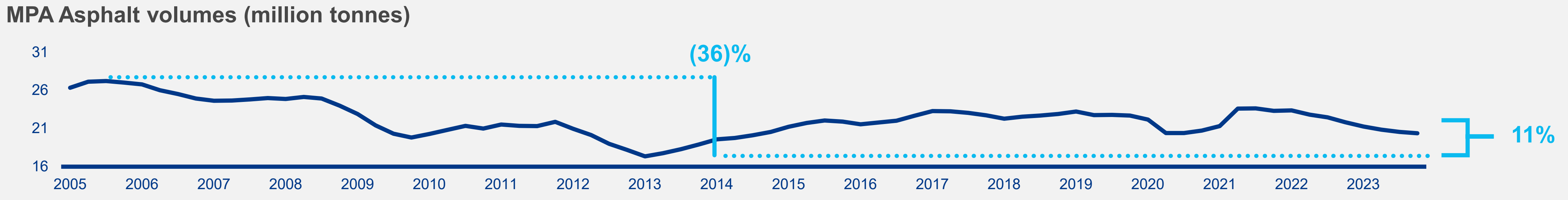


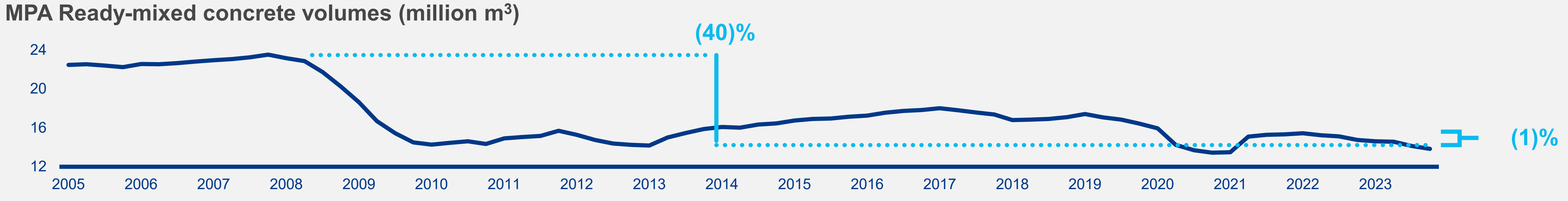
Source: Bloomberg.

Note: Charts based on 3 month forward electricity price, spot bitumen price and current year EU ETS carbon price, all rebased to 100 at January 2018.

MPA volumes







Note: Percentages show the % fall from peak to trough and the % recovery of the peak to trough fall to date.

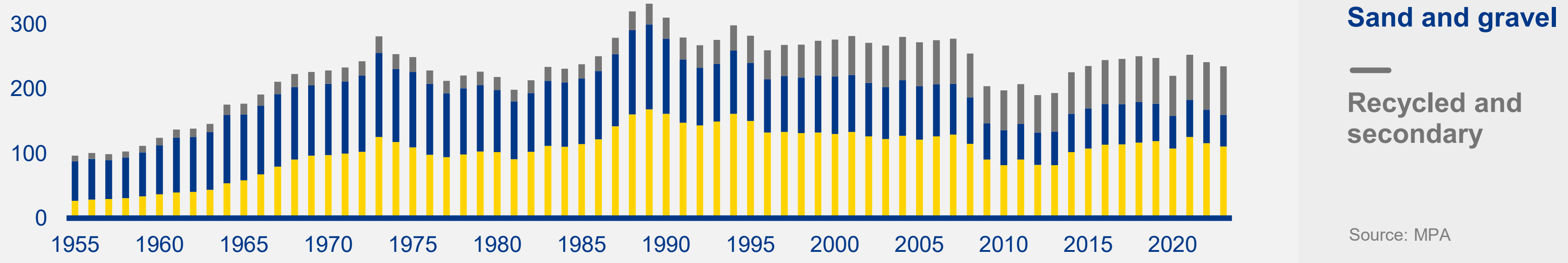
Source: MPA member volumes. Product volumes reflect total market volumes for primary aggregates and MPA member volumes for asphalt and ready-mixed concrete.

Aggregates pricing outpaces inflation

Asset base and local model provide a natural inflation hedge

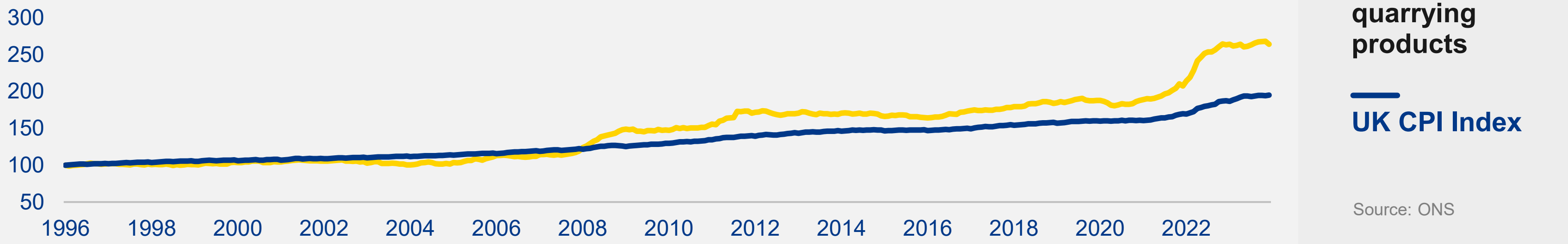
Breedon reserves and resources
1bn tonnes

Aggregates markets by source of supply in Great Britain, 1955-2023
million tonnes



Source: MPA

Aggregates prices outpace inflation over time
indexed to 100 in 1996



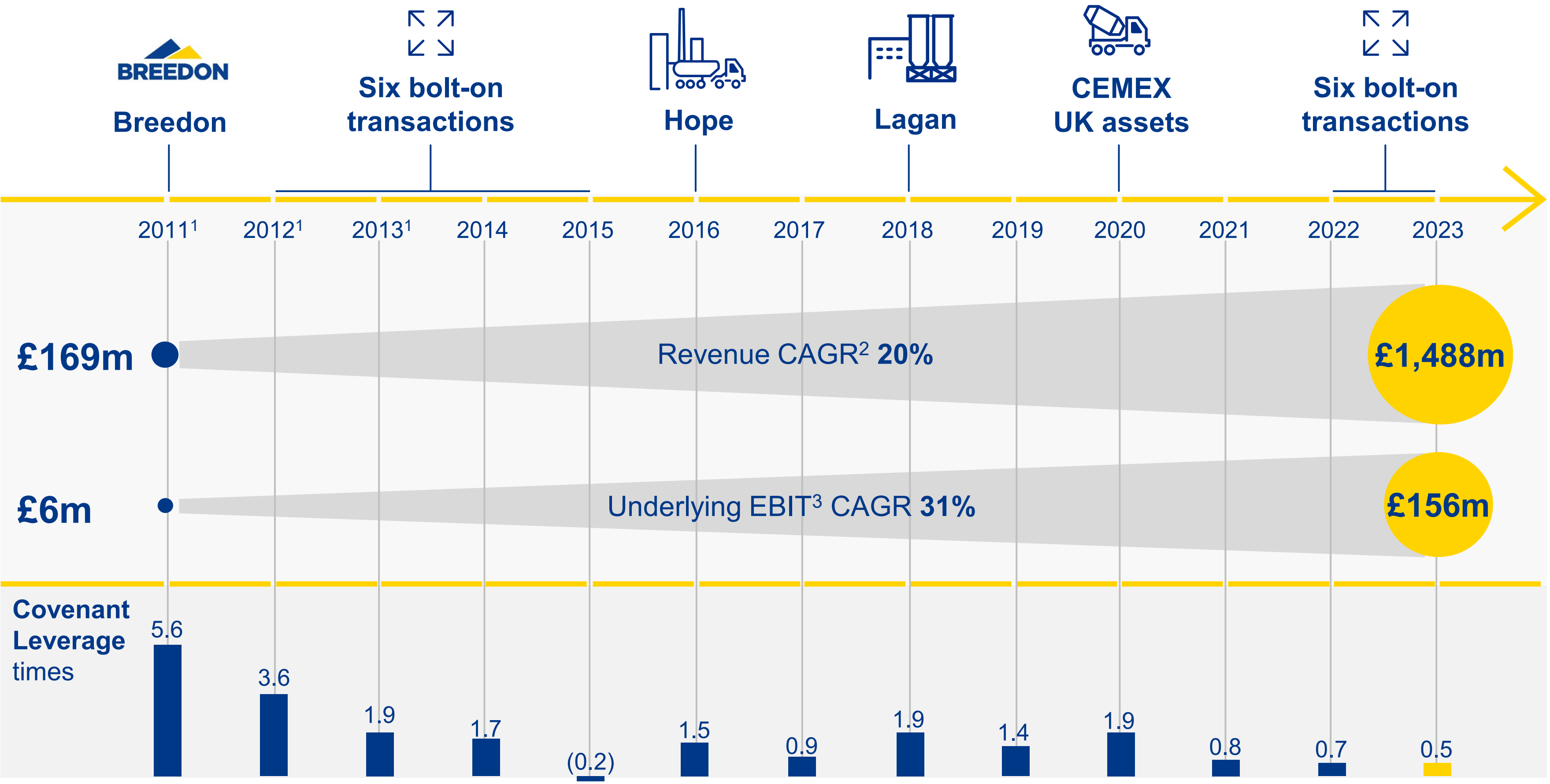
Source: ONS

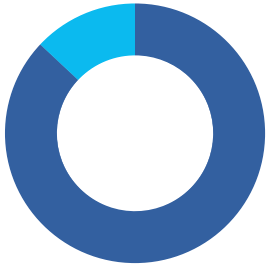
Market consensus

Company compiled - February 2024

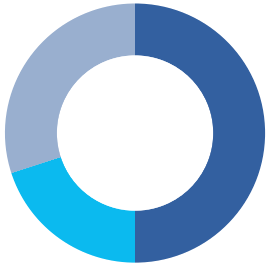
	2023		2024	
	Average	Range	Average	Range
Revenue	£1,489m	£1,470m - £1,501m	£1,513m	£1,460m - £1,553m
Underlying EBIT	£152m	£145m - £156m	£157m	£151m - £163m
Underlying basic earnings per share	32.2p	31.3p - 33.1p	32.7p	31.3p – 34.0p
Net debt	£176m	£154m - £187m	£119m	£71m - £142m
Dividend per share	11.8p	10.5p – 13.2p	12.5p	11.0p - 13.5p

Track record of sustainable growth





UK 87% RoI 13%



Infrastructure c.50%

Housing c.20%

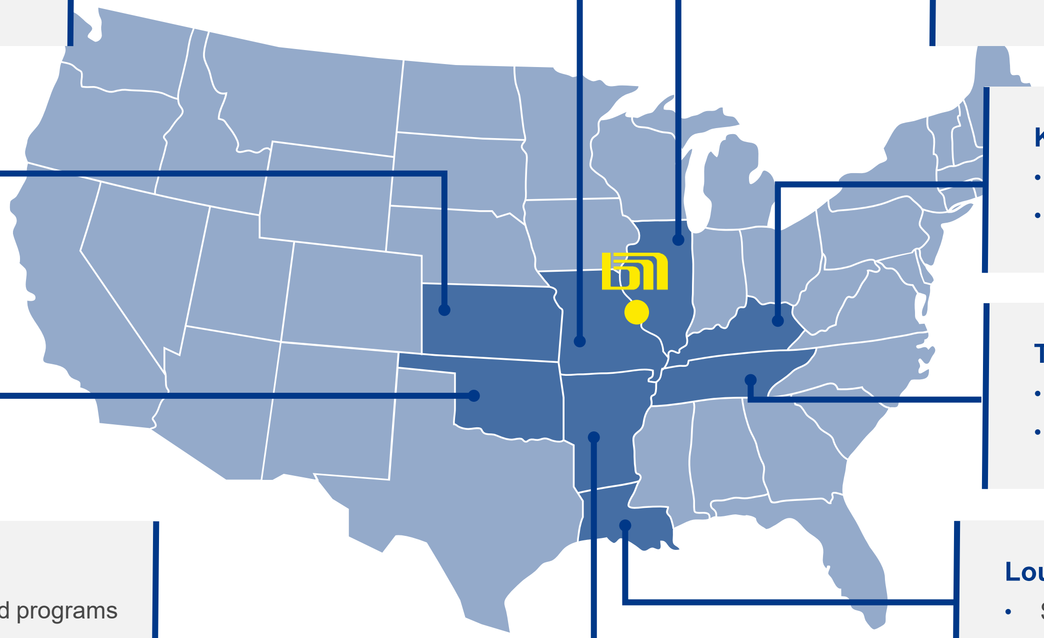
Industrial, Commercial and Other c.30%

1. Covenant Leverage has been calculated on a consistent basis for all periods, following the principles set out in the Group's current debt facility agreements.
2. CAGR Compound Annual Growth Rate.
3. EBIT refers to earnings before interest and tax and equates to profit from operations.

Midwest infrastructure needs

Substantial increase in Federal infrastructure spending

Regional Infrastructure Investment and Jobs Act funding



Missouri
- **$6.5B** for federal-aid highway apportioned programs
- **$484M** for bridge replacement and repairs

Kansas
- **$2.6B** for federal-aid highway apportioned programs
- **$225M** for bridge replacement and repairs

Oklahoma
- **$4.3B** for federal-aid highway apportioned programs
- **$266M** for bridge replacement and repairs

Arkansas
- **$3.6B** for federal-aid highway apportioned programs
- **$278M** for bridge replacement and repairs

Illinois
- **$ 9.8B** for federal-aid highway apportioned programs
- **$1.4B** for bridge replacement and repairs

Kentucky
- **$4.6B** for federal-aid highway apportioned programs
- **$438M** for bridge replacement and repairs

Tennessee
- **$5.8B** for federal-aid highway apportioned programs
- **$302M** for bridge replacement and repairs

Louisiana
- $4.8B for federal-aid highway apportioned programs
- $1.01B for bridge replacement and repairs

Infrastructure spending growth aligns with future expansion potential

Track record of value-added transactions

Leading regional business

BREEDON

Key Business Events
Key Company Acquisitions

1925 — **F.E. Breckenridge Material Company Founded**

1961 — **Breckenridge completes first acquisition of Worthington Materials**

2003 — BMC ENTERPRISES, INC. — **Breckenridge reorganises, creating BMC Enterprises, Inc. as the parent corporation**

2013 — Base Rock • Minerals • — Acquires Base Rock Minerals

2014 — **BMC Stone, LLC created**

2014 — BMC STONE, LLC — Acquires Oldcastle Materials APAC Eastern Missouri.

2016 — BMC SAND, LLC — Acquires Lincoln County Sand & Gravel

2017 — Base Rock • Minerals • — Acquires Strack Stone Company

2018 — Mark Twain Ready Mix — Acquires Mark Twain Ready Mix

2018 — **RMC, LLC develops a greenfield ready mix operation in Base Rock's Fruitland, MO quarry**

2019 — RMC — Acquires Duncan Ready Mix and Sand & Gravel

2020 — RMC — Acquires Payne Ready Mix

2021 — MC Materials, LLC — Acquires Stewart Morrison Redi-Mix and River Rock Ready Mix

2021 — RMC — Acquires Spencer Ready Mix

2021 — Stewart Concrete Products — Acquires Stewart Concrete Products

2021 — S & S Ready Mix Quality Concrete — BMC Enterprises, Inc. acquires S&S Quarries.

2021 — **BMC expands into building products**

2023 — RBM Raineri Building Materials — Acquires Raineri Building Materials

2023 — Eastern Missouri Concrete — Acquires Blue Grass Ready Mix

2023 — BMC ENTERPRISES, INC. — Acquires Eureka Materials

We are making a material difference

BREEDON

Our Purpose
To make a material difference to the lives of our colleagues customers and communities

Our Vision
To be a leading vertically-integrated international construction materials group

Our Values
To adopt clear authentic behaviours to ensure long-term success

Our Strategy
To create sustainable value for all stakeholders over the long-term

- SUSTAIN
- OPTIMISE
- EXPAND