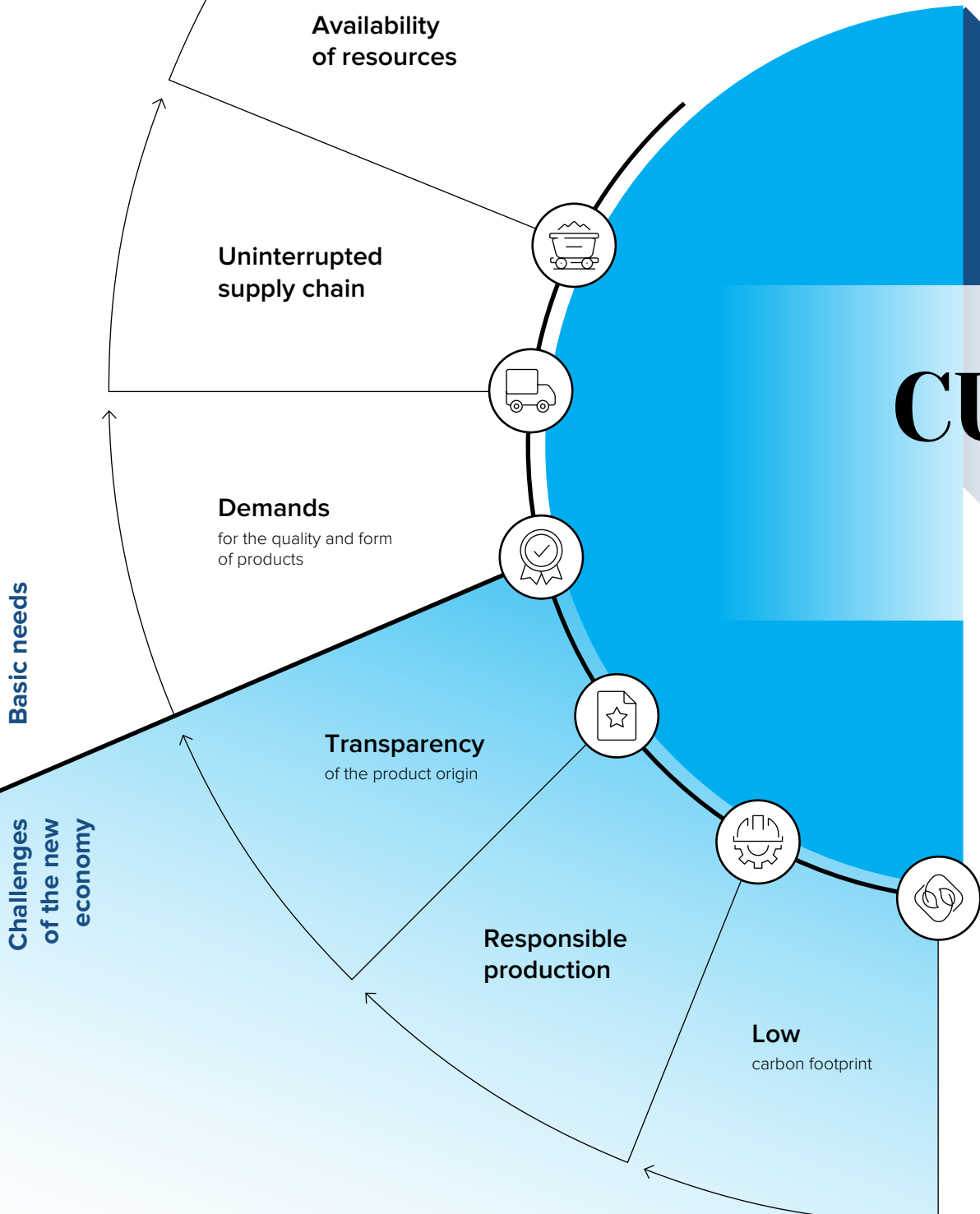


CUSTOMER FOCUS

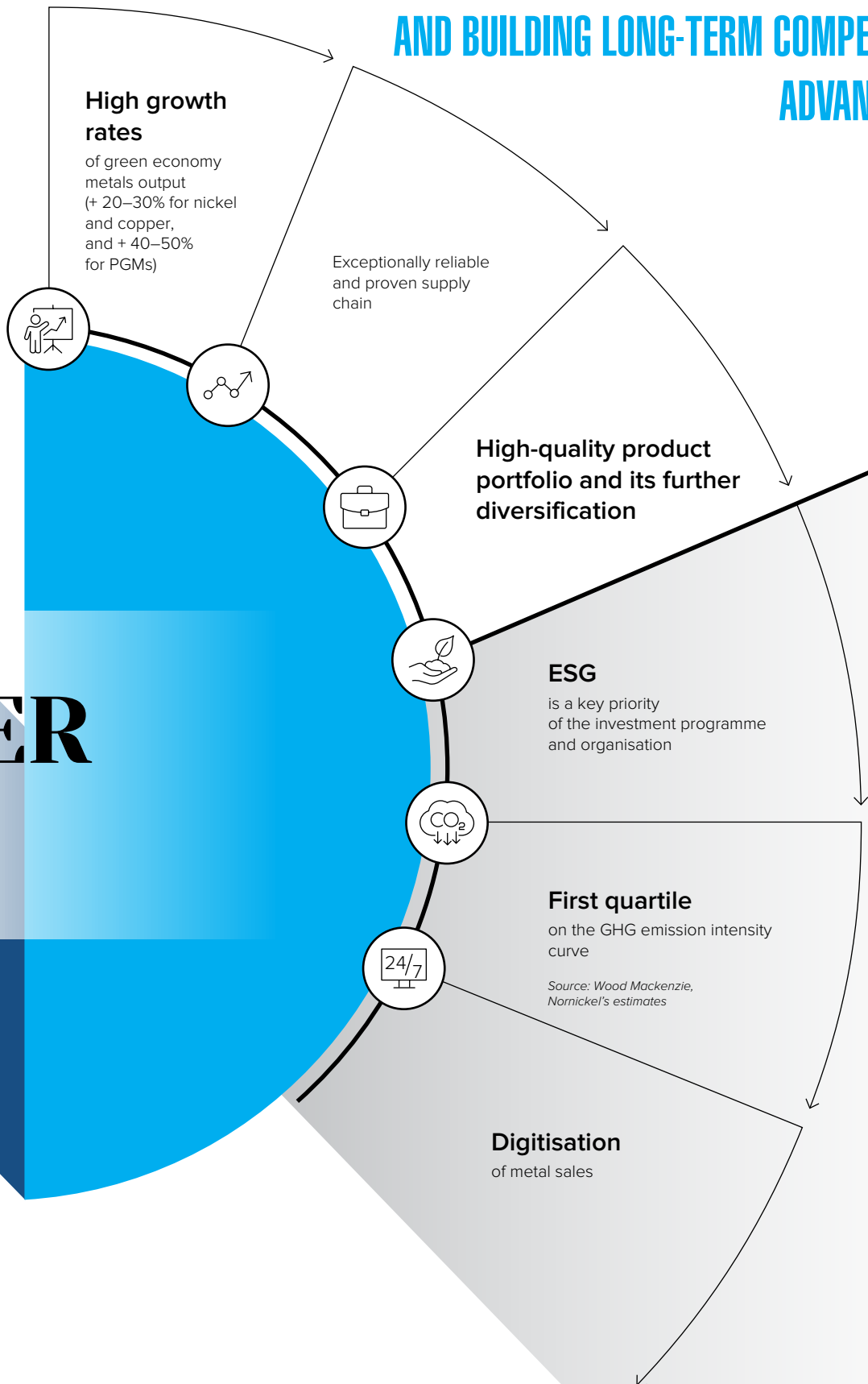
THE COMMODITY
BUSINESS
OF THE FUTURE



CREATING VALUE FOR CUSTOMERS AND BUILDING LONG-TERM COMPETITIVE ADVANTAGES

2

CUSTOMER NEEDS



Meeting basic needs

Aspiration to maintain leadership in the future

