

# Sibelco online shop

SAP Connect for CX



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Lead Business Applications Commercial  
**Sibelco**



# Agenda

1 Group Overview

2 The Digital Journey

3 Reflection

4 Q & A





# Group Overview 2026

# Sibelco Overview

32

Countries\*



5%

of total electricity generated by Sibelco's and partners renewables



39

Clusters\*\*



0.23

Carbon intensity emissions, scope 1 & 2 kg CO<sub>2</sub>/Euro ex-works revenue\*\*\*



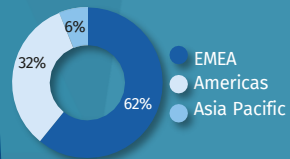
4,907

Employees



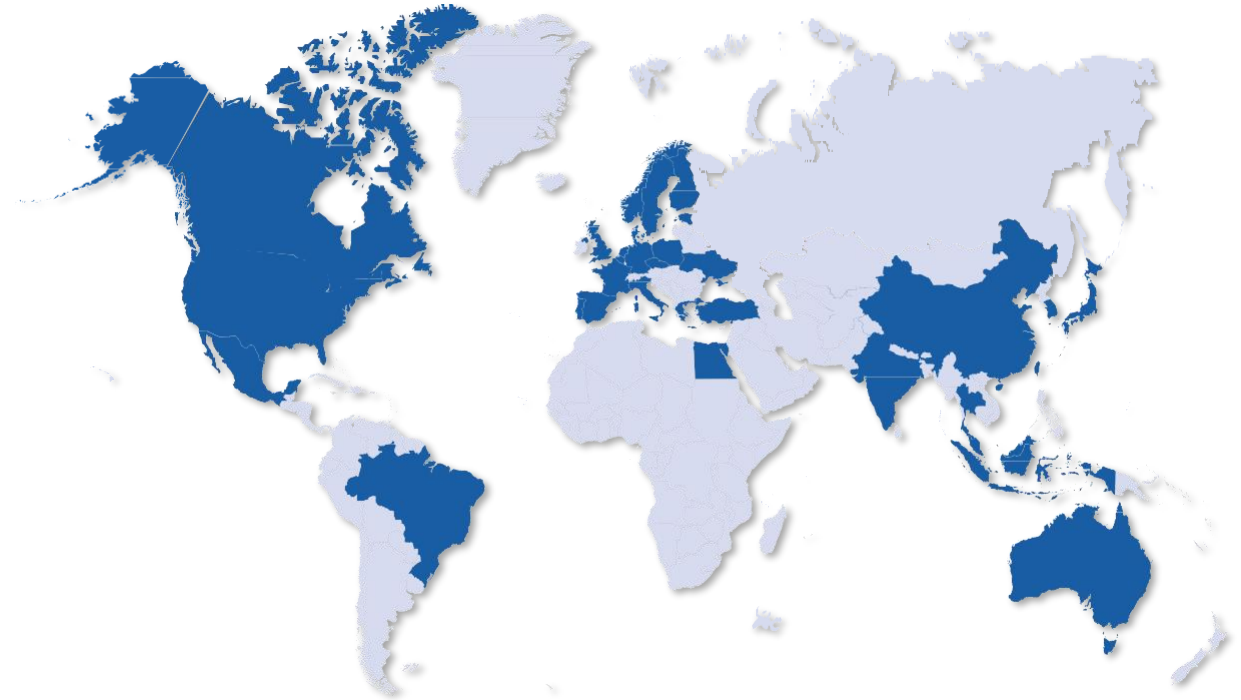
2.95

Recordable Incident Rate



Revenue by Origin

## Non-Financial Key Figures at end Dec 2025



## Financial Key Figures 2025

Revenue in € million

2025	€ 2,237
2024	€ 2,225
2023	€ 2,104

EBITDA in € million

2025	€ 455
2024	€ 471
2023	€ 414

Adjusted FOCF in € million

2025	€ 85
2024	€ 239
2023	€ 169

Adjusted ROCE in %

2025	11.0%
2024	15.1%
2023	12.5%

\* Countries with mining or industrial operations

\*\* A cluster is a group of Sibelco sites operating together as a single, decentralised mini enterprise, working within a global framework. Cluster teams are empowered to think and act like entrepreneurial owners

\*\*\* Baseline recalculated in line with GHG protocol. More on the CO<sub>2</sub> Strategy in [our Climate & Energy Report](#)

Adjusted FOCF: excludes the impact of customer prepayments Adjusted ROCE: Recurring EBIT/Avg Capital Employed

# Our Purpose

Everything we do is guided by our purpose:

## Material Solutions Advancing Life

We create materials that power progress. Our products help to build homes, cities and vehicles; to support the supply of renewable energy, food and clean water; to create technologies such as smartphone display screens, printed circuit boards and semiconductors.

**We do this within a robust sustainability framework, always balancing economic performance with environmental stewardship and social responsibility.**



# Key Mineral Profiles



## Industrial Silica

Silica ( $\text{SiO}_2$ ) is a compound of silicon and oxygen, the two most abundant elements in the Earth's crust. Materials with a silica content of 98% or more are essential for industrial manufacturing, as their high purity ensures reliable performance and functionality.



## High Purity Quartz

High purity quartz sands are used to produce fused quartz, a material with unique optical, mechanical and thermal properties, which make it indispensable in the manufacture of a wide range of high-tech products.



## Recycled Glass

Recycled glass helps container glass manufacturers lower their energy costs, reduce  $\text{CO}_2$  emissions, conserve virgin raw materials, and prevent waste glass from entering landfills.



## Other Silicate Materials

Feldspathic minerals are valued across a range of industrial applications for their high alumina and alkali content.

Sibelco olivine is a high-purity magnesium-iron silicate mineral.

Ball clays are fine-grained, highly plastic sedimentary clays, whilst Kaolin is composed of the aluminosilicate mineral kaolinite.

# Markets



## Construction

- Sanitaryware
- Wall & floor tiles
- Engineered stone
- Construction materials



## Glass & Electronics

- Float glass
- Container glass
- Solar PV
- Display glass
- Semiconductors
- Printed circuit boards



## Industrial & Consumer

- Paints
- Polymers
- Flame retardants
- Water filtration
- Tableware
- Personal care
- Sports & leisure



## Metallurgy

- Steel
- Foundry
- Refractory



## Recycling

- Recycled glass for re-melt
  - Container glass
  - Float glass
  - Glass wool
  - Glass beads
- Calibrated recycled glass
  - Filtration
  - Abrasives
  - Fillers
  - Ceramics

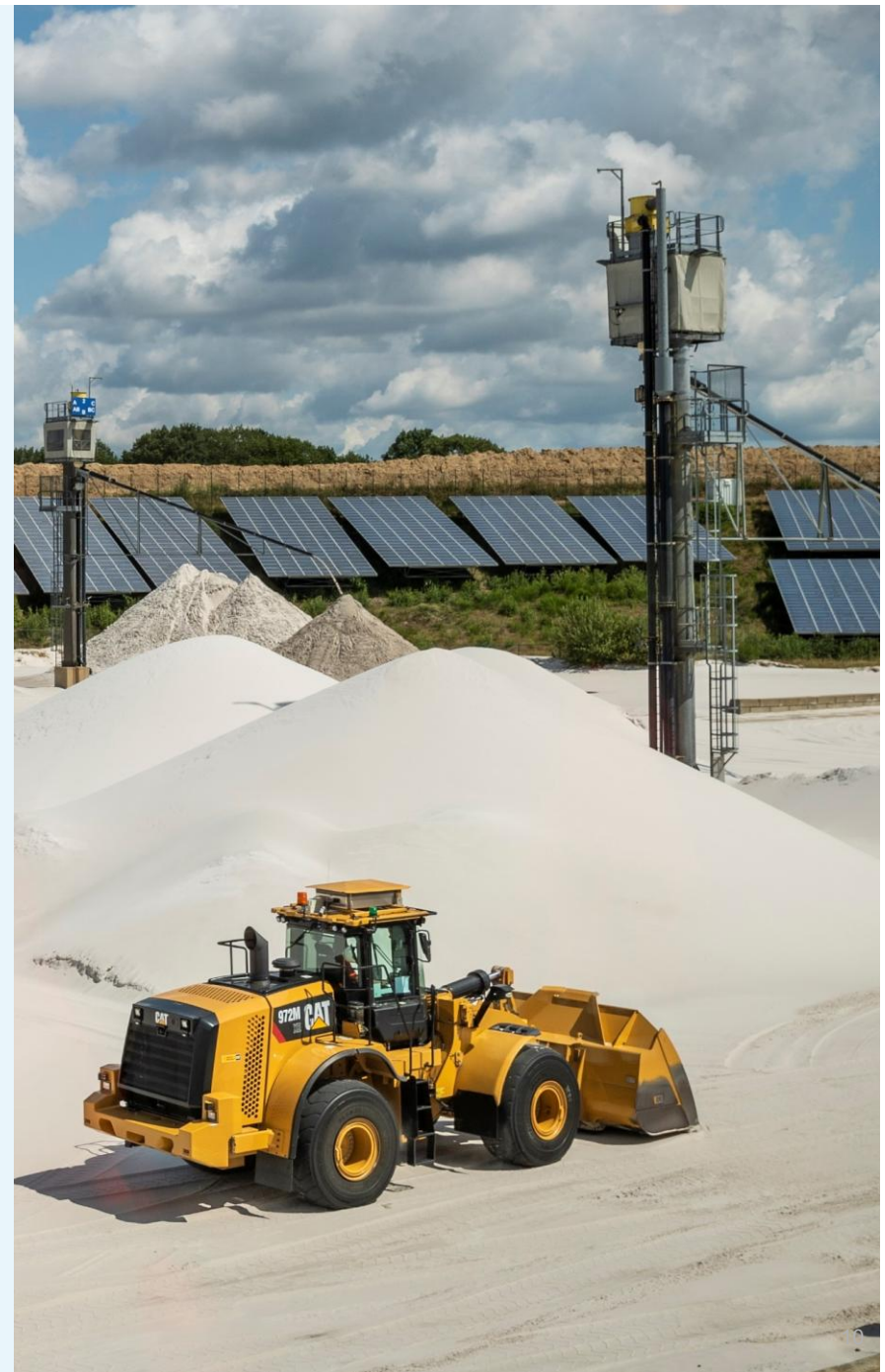
Sibelco  
COBANASIL®  
sand



Sibelco EQUESIL™ sand

**From a quarry to the  
Olympic podium**

# The Digital Journey



# Digital Journey



Discovery

Strategy

Foundation

Expansion

Scale

2020

2021

2022

2023

2024/25

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Accelerate  
eCommerce Trial  
PO Digitization

# Journey – Accelerate Project



Objective is to explore digital opportunities by:

1. Introduction of a **digital sales channel** to drive top-line growth
  - Increase online presence through ecommerce website > Quantify digital demand & Sibelco's opportunity
  - Design & run digital campaign to create new leads > Identify scale-up opportunities.
2. Shifting to **100% touchless Order-To-Cash (OTC) process** for higher customer centricity and productivity gain
  - Introduce frictionless ecommerce platform
  - Introduce OCR software for automated order taking based on incoming purchase orders

# From 100% manual order entry to...



TODAY

## Phone calls

**9%**

on average, varies 0-25% per country

1%

## Free-text e-mails

**21%**

8%

21%

10%

## PO over e-mail

**70%**

on average, includes free-text e-mails & e-mails with PO

58%

## Other channels

**0%**

2%

TOMORROW

## Phone calls

**1%**

Exceptional orders

## eCommerce

**39%**

Ordering pattern:

- Rare ordering (1-5/year)
- Small customers

## Touchless PO over e-mail

**58%**

Ordering pattern:

- Frequent ordering

## Other electronic

**2%**

Large key accounts (enabled by EDI, xCML tech)

(\* ) Strategic direction, actual shift will take few years

# E-commerce trial (POC) for 1 business line



4 months



Non-integrated

Basic non-integrated  
webshop

Low technical effort



2 goals

Test whether we could  
convince customers  
to order online

Learn from the  
experience, identify  
pitfalls, identify  
customer needs,  
change management  
efforts etc, in order to  
further scale and roll-  
out

63%

Customer  
adoption

Success threshold:  
eCommerce adoption  
among pilot group is  
~60%.

Outcome: 63% of  
customer adoption  
(representing 72% of  
orders)

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Journey Mapping  
Capability Mapping  
CX Vision

# Customer Experience Journey mapping



## Persona #1: Olivier



Olivier, 45

### Who is he?

- Production manager of medium-sized, regional glass company.
- He has been in his role for 10 years.
- He likes to communicate via phone (call / text) for fastest problem solving.

### How he finds us

- Sibelco is a long-time supplier, informs purchasing to make order request

### Pain Points

1. Specific and consistent quality
2. Availability as operation has 24/7 production
3. Problems to be resolved quickly

### What he wants to know

- Technical specification
- Availability / Delivery
- Contact to solve problem

### What he doesn't want

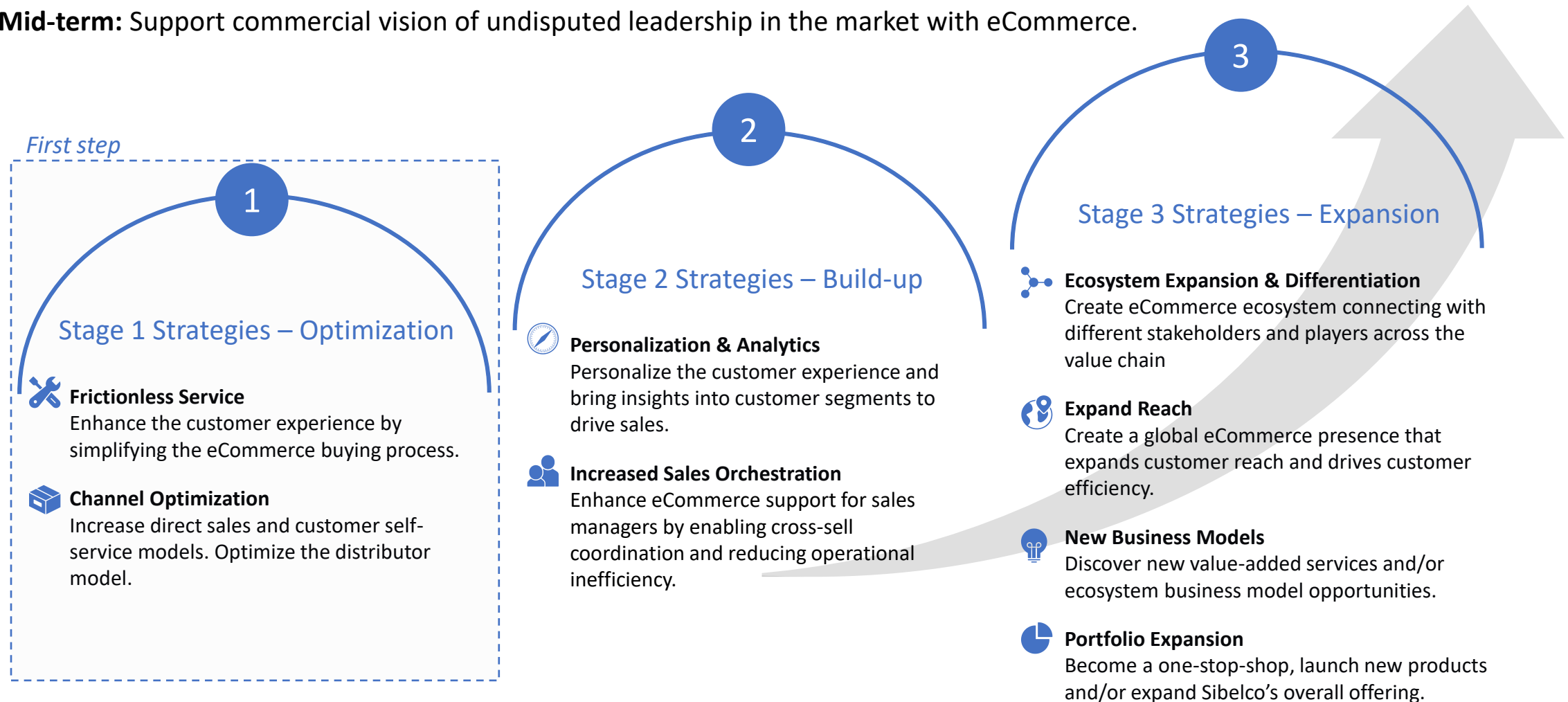
- Variability
- Negative impact to production

### Why he buys from us?

- Availability
- Product Quality/ Technical Support
- Lowest price for right specification
- Customer Service

**Short-term:** Focus is touchless, Order to Cash pilot, focusing on D-E customers or customers currently served by Distributor. To deliver an Amazon-like “ease of use” experience with visibility to portfolio, shipping status, easy payment, etc.

**Mid-term:** Support commercial vision of undisputed leadership in the market with eCommerce.



# Prioritization of eCommerce capabilities



		<u>IMPORTANCE</u>		
		Non-negotiable	Preferred	Nice to have
<b>SEQUENCE</b>	<b>Foundational</b> (all are non-negotiable)	<ul style="list-style-type: none"> <li>Order confirmation &amp; summary</li> <li>Order status/history</li> </ul>		
	<b>Stage 1</b> <ul style="list-style-type: none"> <li>Frictionless service</li> <li>Channel optimization</li> </ul>	<ul style="list-style-type: none"> <li>Shipment tracking</li> <li>Local language</li> <li>Local currency</li> <li>Mobile commerce</li> </ul>	<ul style="list-style-type: none"> <li>Multiple ship-to's</li> <li>Auto-replenish / scheduling</li> </ul>	<ul style="list-style-type: none"> <li>Contract management</li> </ul>
	<b>Stage 2</b> <ul style="list-style-type: none"> <li>Personalization &amp; analytics</li> <li>Increased Sales Orchestration</li> </ul>	<ul style="list-style-type: none"> <li>Product promotions</li> <li>Recommendations</li> </ul>	<ul style="list-style-type: none"> <li>Personalized promotions</li> <li>Featured products</li> </ul>	<ul style="list-style-type: none"> <li>Cross-sell / Up-sell</li> <li>Content personalization</li> </ul>
	<b>Stage 3</b> <ul style="list-style-type: none"> <li>Ecosystem Expansion Expand Reach</li> <li>New Business Models</li> <li>Portfolio Expansion</li> </ul>	<ul style="list-style-type: none"> <li>Marketplace / 3rd party</li> </ul>	<ul style="list-style-type: none"> <li>Partner catalog</li> </ul>	<ul style="list-style-type: none"> <li>Ratings &amp; Reviews</li> <li>Flash Sales</li> </ul>

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Capability Mapping  
CX Vision

SAP Commerce Selection  
MVP Launch  
Spain Go-live



40%

## 1. Business Fit

### User Experience

How easy is the tool to use; intuitiveness, performance, ease of navigation

### Functional Fit

How well the application meets the business requirements; consider how much is provided out-of-the-box and how much customisation is required

### Integrated Experience

How seamless the experience of the tool is when integrated with other applications; is data consistent and do users need to switch between applications



30%

## 2. Technology & Architecture Fit

### Ease of Integration

How easily can the application be integrated into the architecture landscape

### Time to Market

How quickly the tool can be configured and setup, ready to use

### Platform Upgrades

How platform upgrade is supported and what the long-term vision is



0%<sup>1</sup>

## 3. Track Record

### Client References

Experiences based on use of application by other clients

### Analyst Recognition

Review of the application by top research analysts

### Expertise

Expertise required and available by the vendor to support implementation



30%

## 4. Cost

### License Cost

Cost to purchase licenses based on the application's cost model

### Implementation Cost

Cost to implement the application

### Maintenance Cost

Ongoing costs to maintain and support the application post implementation

# MVP development



May 2022

Project **kick-off**  
with Flexso & Elision



Nov 2022

**MVP go live** in 1 site in Spain  
Basic order management  
Price calculation  
Order simulation & credit check  
Only existing pre-onboarded customers  
Only payment on account

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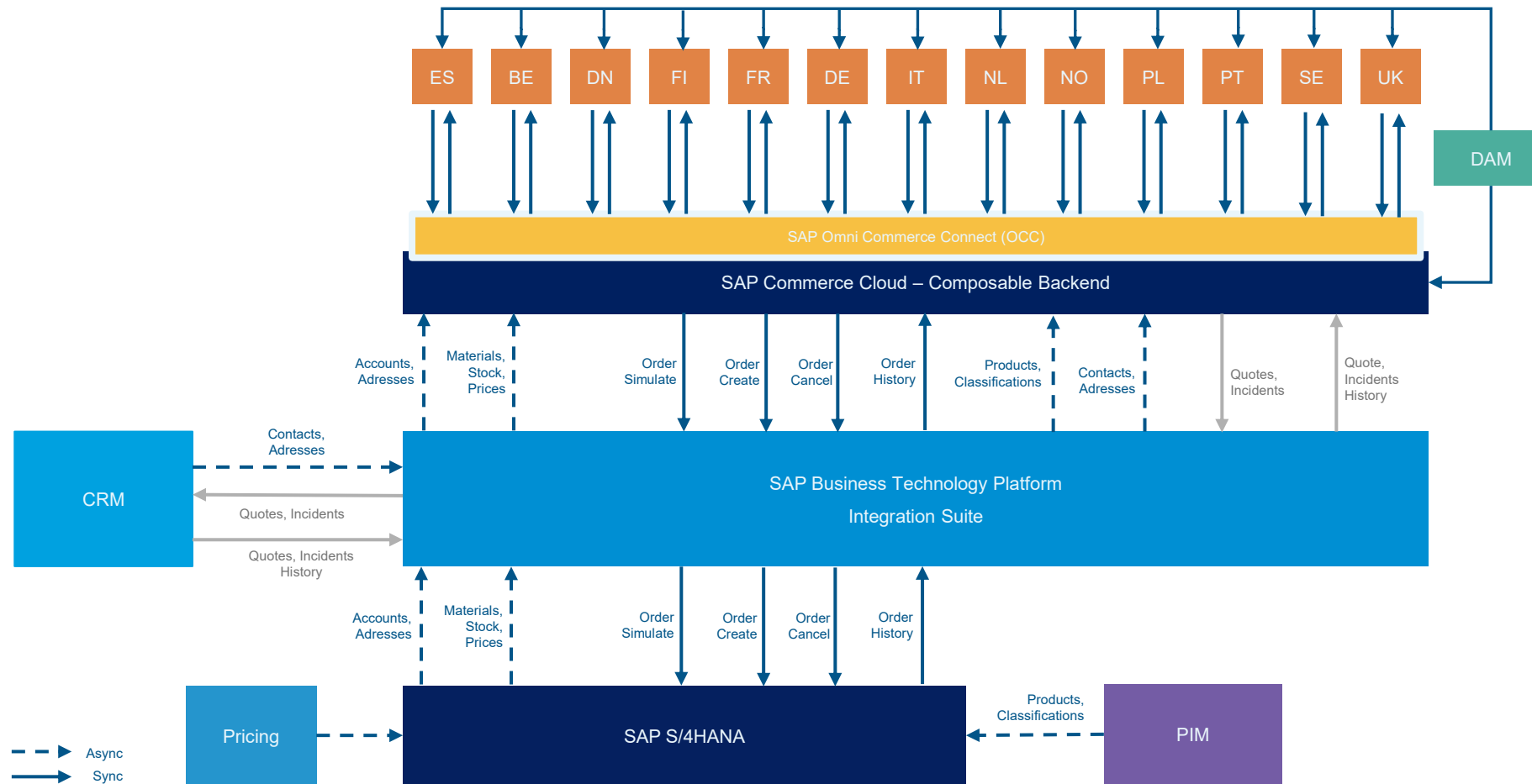
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Iberian roll out  
Online Payments  
S/4 Integration  
Order History

# Architecture overview



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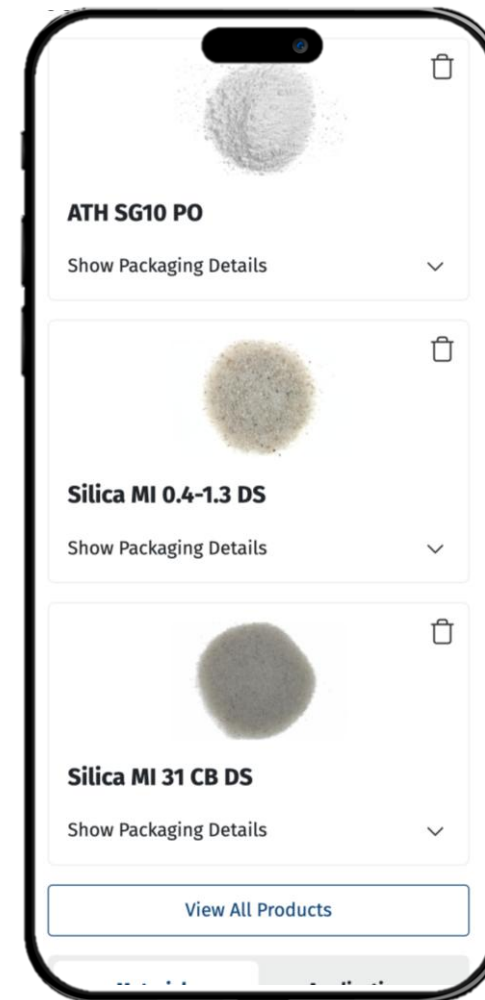
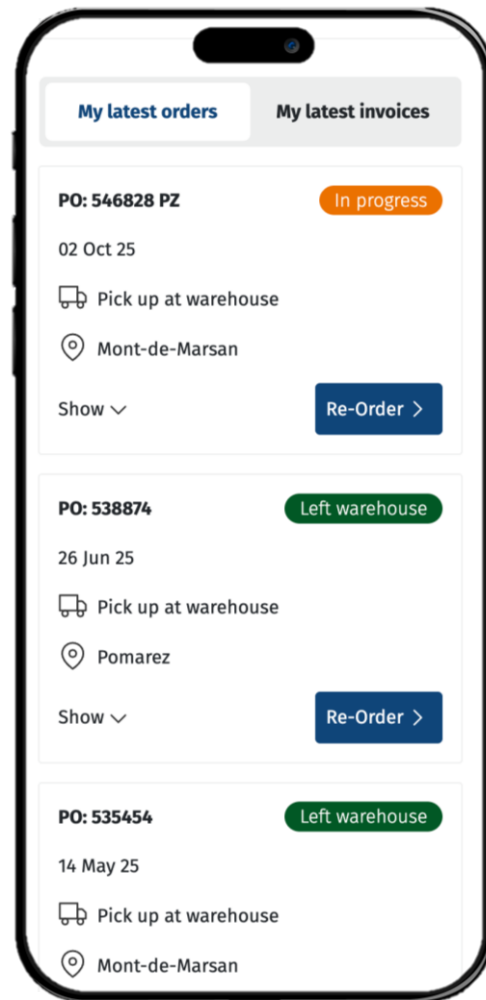
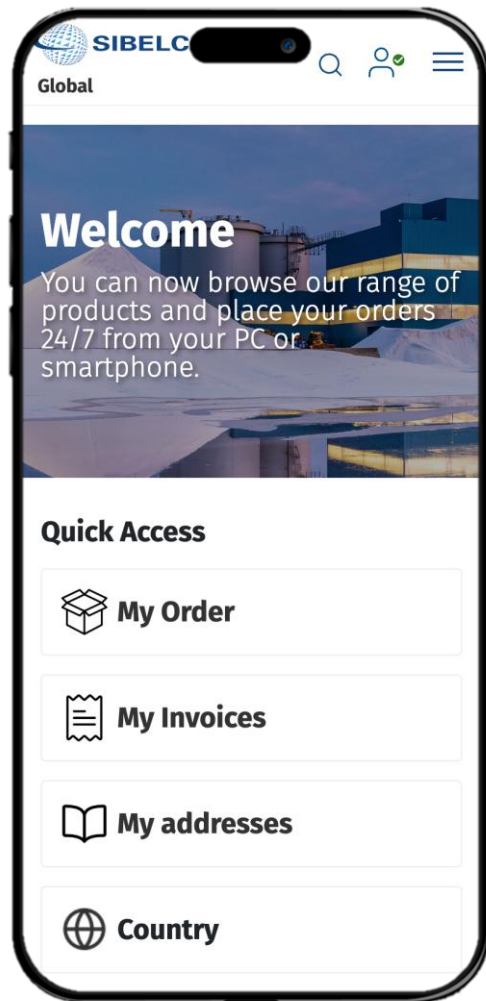
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SAP Commerce  
Selection  
MVP Launch  
Spain Go-live

Iberian roll out  
Online Payments  
S/4 Integration  
Order History

EU Rollout  
Registration Flow  
Mobile Redesign  
Address Book  
Wishlist





...



# Welcome

You can now browse our range of products and place your orders 24/7 from your PC or

## Quick Access

 <b>My Order</b> View and manage your past and current orders	 <b>My Invoices</b> View your invoices	 <b>My addresses</b> Manage your addresses or add a new one	 <b>Country</b> Explore products available in different countries
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### My latest orders My latest invoices

<b>PO: 546828 PZ</b> <span>In progress</span> 02 Oct 25 🚚 Pick up at warehouse 📍 Mont-de-Marsan Show ▾ <a href="#">Re-Order &gt;</a>	<b>PO: 538874</b> <span>Left warehouse</span> 26 Jun 25 🚚 Pick up at warehouse 📍 Pomarez Show ▾ <a href="#">Re-Order &gt;</a>	<b>PO: 535454</b> 14 May 25 🚚 Pick up at warehouse 📍 Mont-de-Marsan Show ▾ <a href="#">Re-Order &gt;</a>
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## 546828 PZ



### Order overview

Delivery method	Pick up at warehouse
Order status	<span>In progress</span>
Delivery / pick-up address	Route De St Sever Mont-de-Marsan 40001
Total	€1,483.20
Total quantity:	4.8 To.

### Products



#### Silica BB 2.0-4.0 GR

Ref: Silica BB 2.0-4.0 GR  
25:PL:H4:NB:1200

4 pallets of 1.2 t

[Re-Order](#)

[Go To Full Order Details](#)

\* prices of the items in your cart might have changed since your last order.

### Material

- Aggregate
- Bentonite
- Calcium carbonate
- Carbon
- Clay
- Cristobalite

[Show more...](#) ▾

### Material - condition

- Crushed
- Dewatered
- Dry
- Gravel
- Noodled
- Powdered

[Show more...](#) ▾

### Sibelco entity

- All Sibelco entities
- Belgium

## Agriculture

Images shown are for illustration purposes only and may not be an exact representation of our products.

Relevance ▾



### Silica GRH615 Gravel

An undried quartz gravel with a 6-15 mm particle size distribution (effective size 5.63 mm, uniformity...

[More](#) ▾

[Big bag](#)

From **122,75 €**

[See Details](#)



### Silica C0-2 Wet

An undried quartz sand with a 0-2 mm particle size distribution, ideal for sports surfaces, agriculture an...

[More](#) ▾

[Bulk](#)

[Big bag](#)

From **11,15 €**

[See Details](#)



### Silica GRH26 Gravel

An undried quartz gravel with a 2-6 mm particle size distribution (effective size 3.45 mm, uniformity...

[More](#) ▾

[Big bag](#)

[Small bag](#)

From **122,75 €**

[See Details](#)

# Checkout

Need help? [Click here.](#)

Shipping Address **Delivery** Payment Method Review Order

Single order **Multiple orders**

### Schedule multiple orders

Plan orders up to 2 months in advance with various quantities.

### Cart

#### Silica Q8

Ref.: Silica Q8 PO 25:PA:S4:H:1000

Truck type: Trailer truck

	<input type="text" value="14/10/2025"/>		<input type="text" value="5"/>		pallets of 1 t on 1 trucks	
	<input type="text" value="14/11/2025"/>		<input type="text" value="10"/>		pallets of 1 t on 1 trucks	

 [Add another date](#)

### Order Summary

Subtotal	€4,957.71
Delivery cost	€0.00
Energy surcharge:	€0.00
Fuel surcharge	€0.00
Additional tax	€0.00
Taxes	€0.00

**Total: \*** €4,957.71

**Total quantity: 24 metric tonne(s)**

\* Transportation costs and surcharges will be calculated during the checkout.

[Go To Payment Details](#)

# Reflection



# Reflection of the project



- What went well:
  - Clear long-term ecommerce vision
  - Strong partner expertise: Flexso & Elision
  - High cross-functional engagement & commitment: Sibelco business & IT Commercial, Supply Chain, Finance teams
  - eCommerce solution is internally accepted & trusted
  - Overall customer feedback is positive
- What was challenging:
  - Adding new functionality + doing roll-outs at the same time → Speed vs Stability
  - B2B vs B2C: e.g. Customer Registration
  - Multi system landscape: e.g. pricing complexity
  - Master Data readiness for roll-outs

# Results today



13 countries



28k order

- 2024: 5k
- 2025: 20k
- 2026: 28k



Small & large

Not only small customers, but also 200+ large

- Where to go with the platform
  - Touchless OTC
    - Order changes
  - Growth:
    - Quotations
    - Product search
    - Marketing campaigns
    - Abandoned carts
    - Customers that registered but have never ordered
    - Analysis of ordering patterns

# Q&A