

SGS Virtual
Investor Days
2021



Natural Resources

Developing sustainable solutions

May 27, 2021

Natural Resources

Vision and 2023 ambition

- **Vision:** leveraging the **expertise** of the Natural Resources group to service the client life-cycles of Mining, Agriculture and Energy in a fully sustainable manner to **deliver value beyond compliance**
- **How:** enhance our global market leadership by **fostering business competitiveness and operational efficiencies**
 - **Sustainability Solutions**
 - Portfolio development to incorporate decarbonization/carbon emission tracking solutions in commodities industries
 - **Service Differentiation**
 - Adopting digitized and innovative solutions to increase speed-to-market data and operational efficiencies
 - **Portfolio Expansion**
 - Complementing testing with process consulting and technical advisory services in a suite of integrated solutions



Natural Resources

SBU market position, return and capital allocation strategy

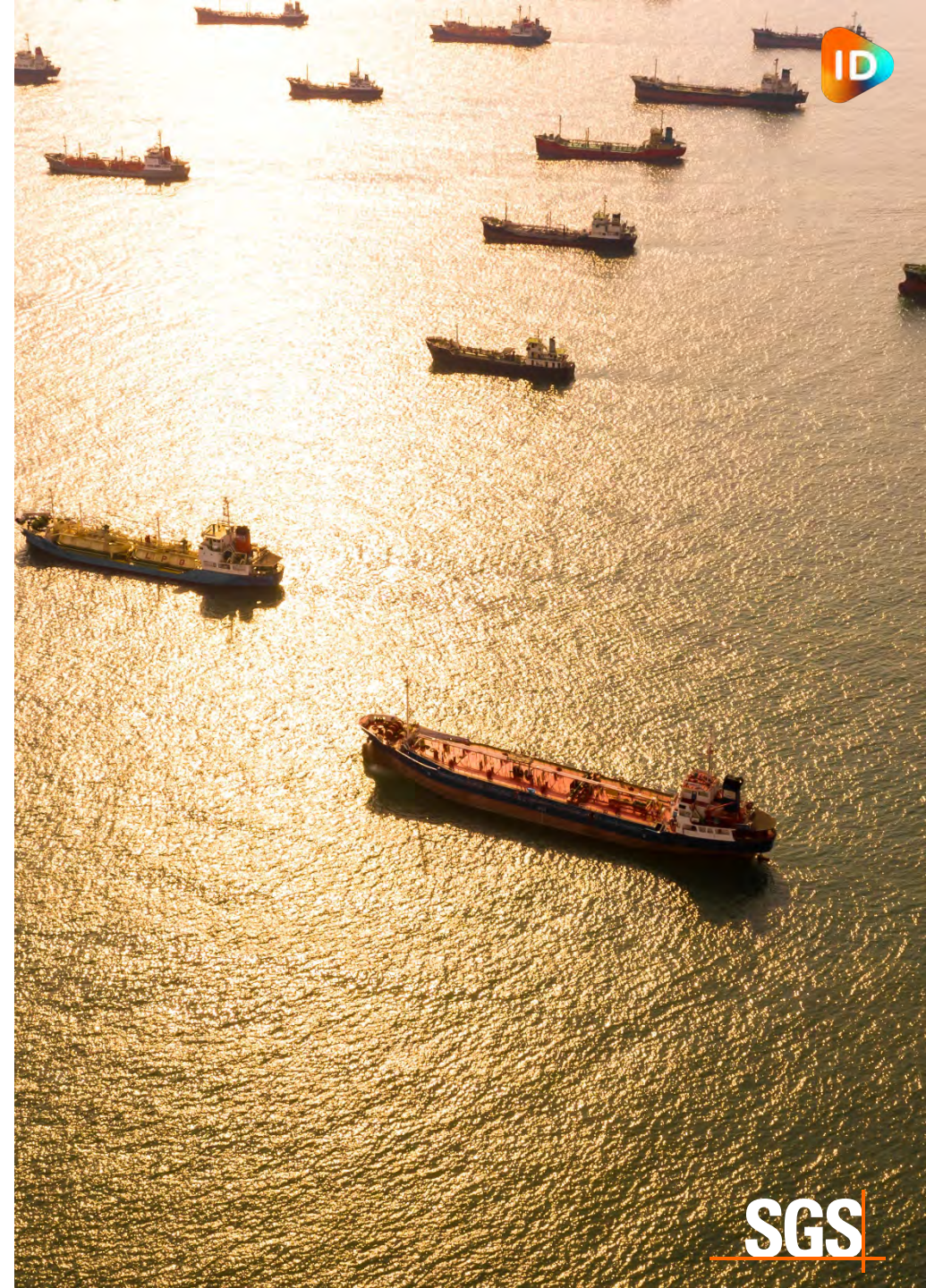
	ORGANIC GROWTH PROFILE	RELATIVE MARKET SHARE	CAPEX INTENSITY	NWC INTENSITY
Trade and Inspection	LOWER	LEADER	LOWER	AVERAGE
Lab Testing – NR	MID-SINGLE	LEADER	AVERAGE	AVERAGE
Metallurgy and Consulting	MID-SINGLE	EQUAL	AVERAGE	AVERAGE
Natural Resources	LOWER	LEADER	LOWER	AVERAGE

Natural Resources

Consolidation

Consolidating Natural Resources:

- While operating across three different industries, there are elements of commonality which we will, as a **consolidated services group**, seek to further leverage within the portfolio
- Allowing for an **integrated strategic path** on elements of digitization, new generation fuels and sustainability solutions
- **Replicating** our successful digital competence across the trade supply chain for all three industries
- **Optimizing** service execution to create increase capacity and capability



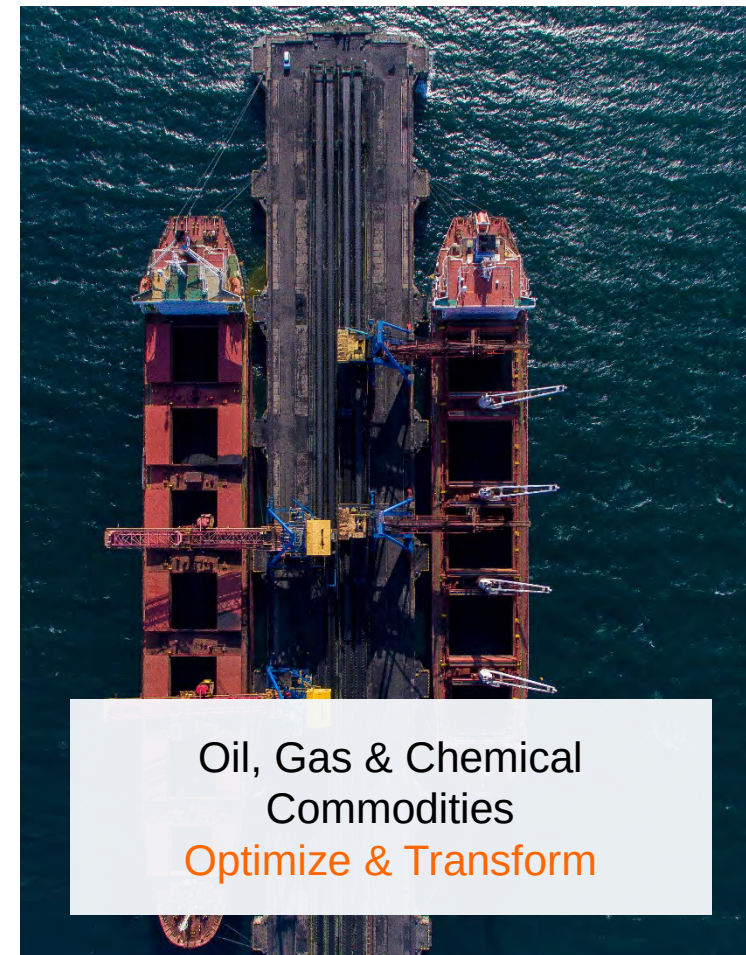
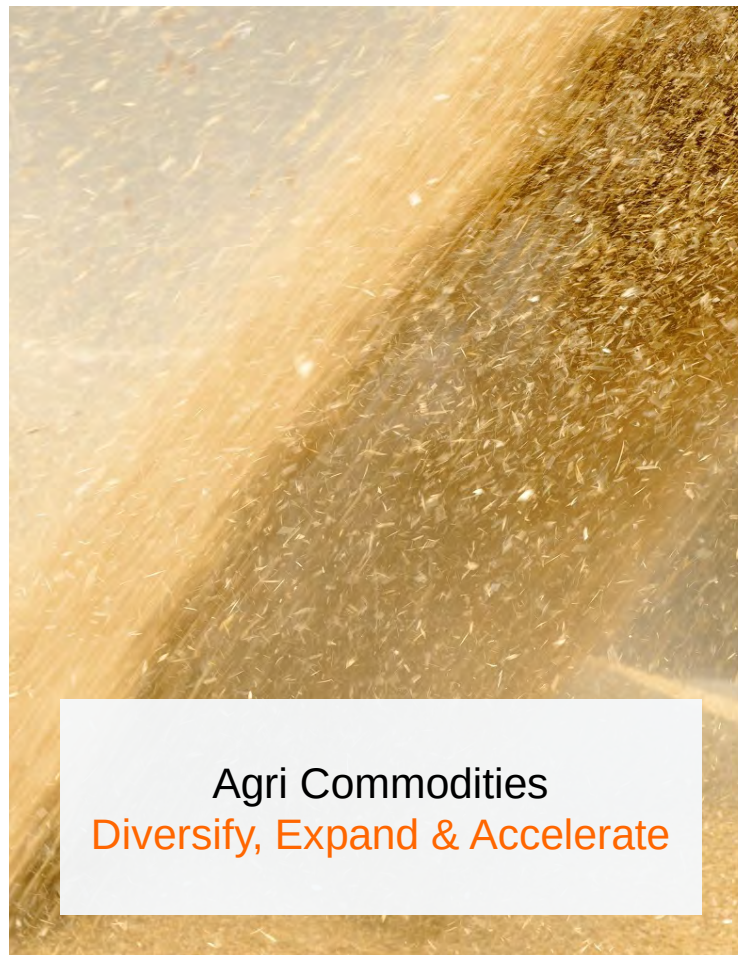
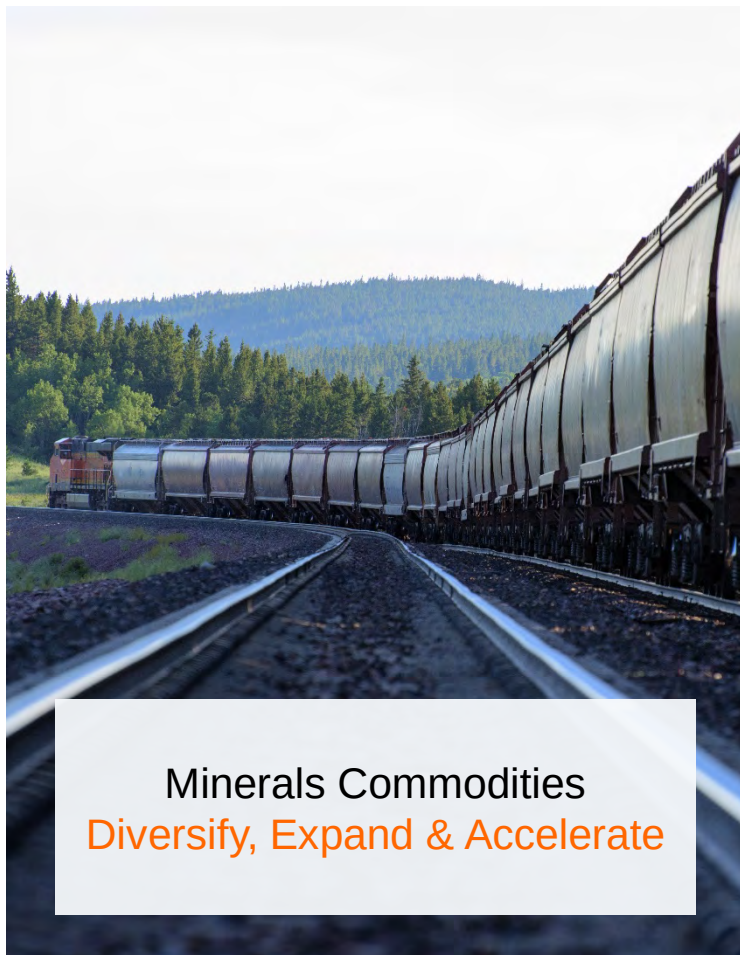
Natural Resources

Megatrends reshaping the commodity markets



Traditional Services

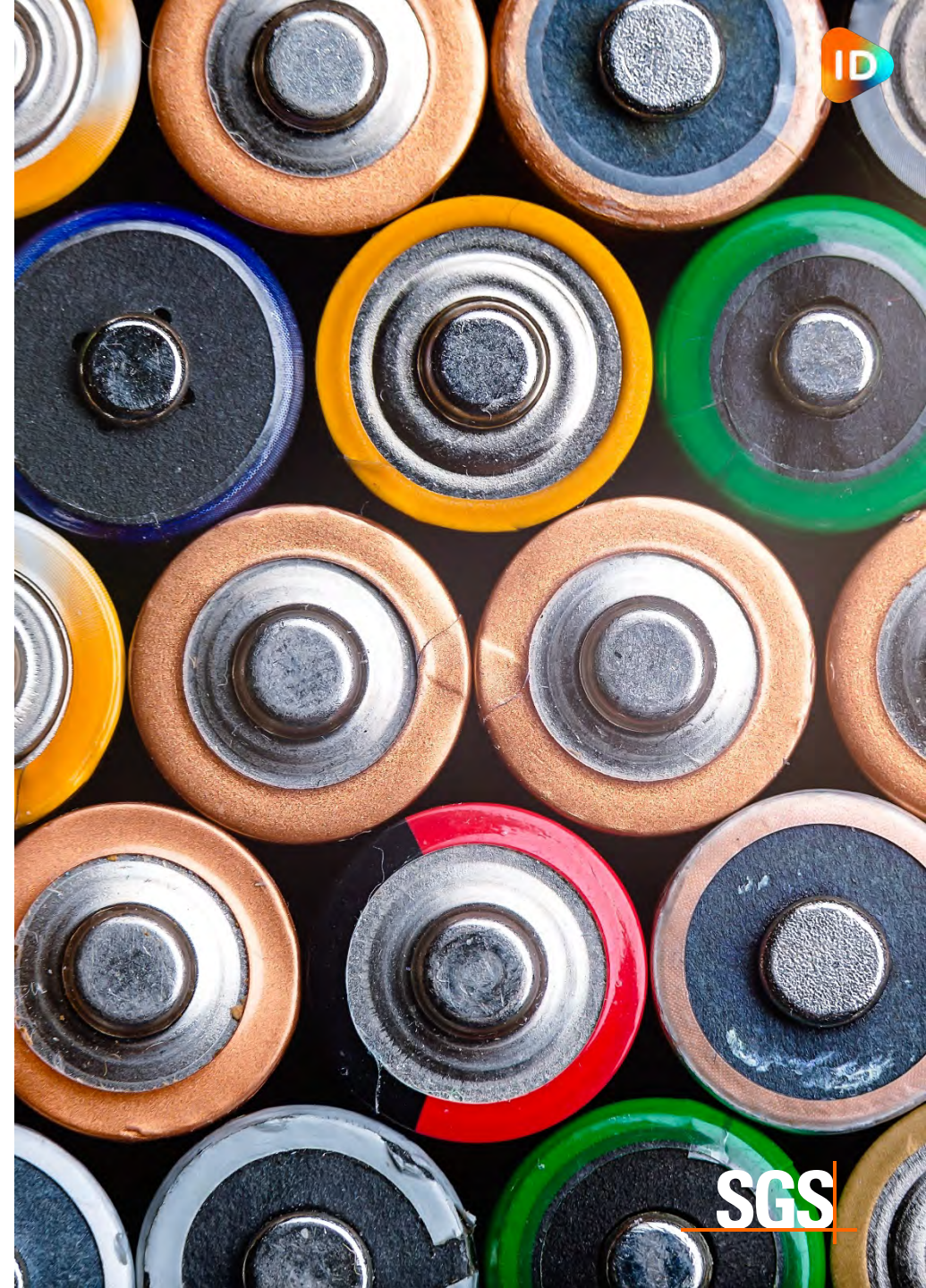
2023 direction & priorities



Sustainable Solutions Partner

Leveraging our services portfolio

- Our existing portfolio has strong suite of operational sustainability related solutions:
 - Battery metals recycling methodology
 - Low sulfur fuel analysis
 - White certificates services – certifying energy-saving initiatives
 - Biofuels, biomass solutions to mining, agriculture and energy
- Next steps...
 - Measure and access data
 - Solutions to reduce footprint
- Potential market ~CHF 100-150M by 2023/2025



The Digital Path

Service differentiation through digital

Our digital solutions are used directly or via technology partners to enhance our value proposition and increase operational efficiency.

- Successful operating solutions:
 - **SGS Inspire**: objective data-based source of information for commodities
 - **Smart Warehouse**: SGS developed IoT solutions for monitoring commodities
 - **XploreIQ**: machine learning algorithms providing insightful knowledge of minerals deposit
 - **IGS (Integrated Geomet Simulation)**: market leading block modeling solutions



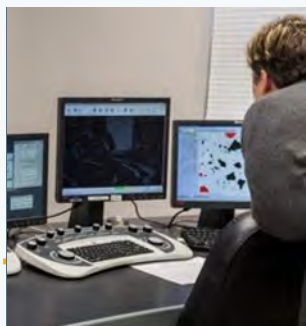
Process Consulting

Portfolio expansion

Pre-production



Site
exploration



Production
forecasting



Pre-production
planning

Production



Production
monitoring

Post-production



Plant
optimization

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Questions?