



AFRICA @ SGS: EPPURE SI MUOVE...

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INVESTORS DAYS, 29-30 OCTOBER 2015

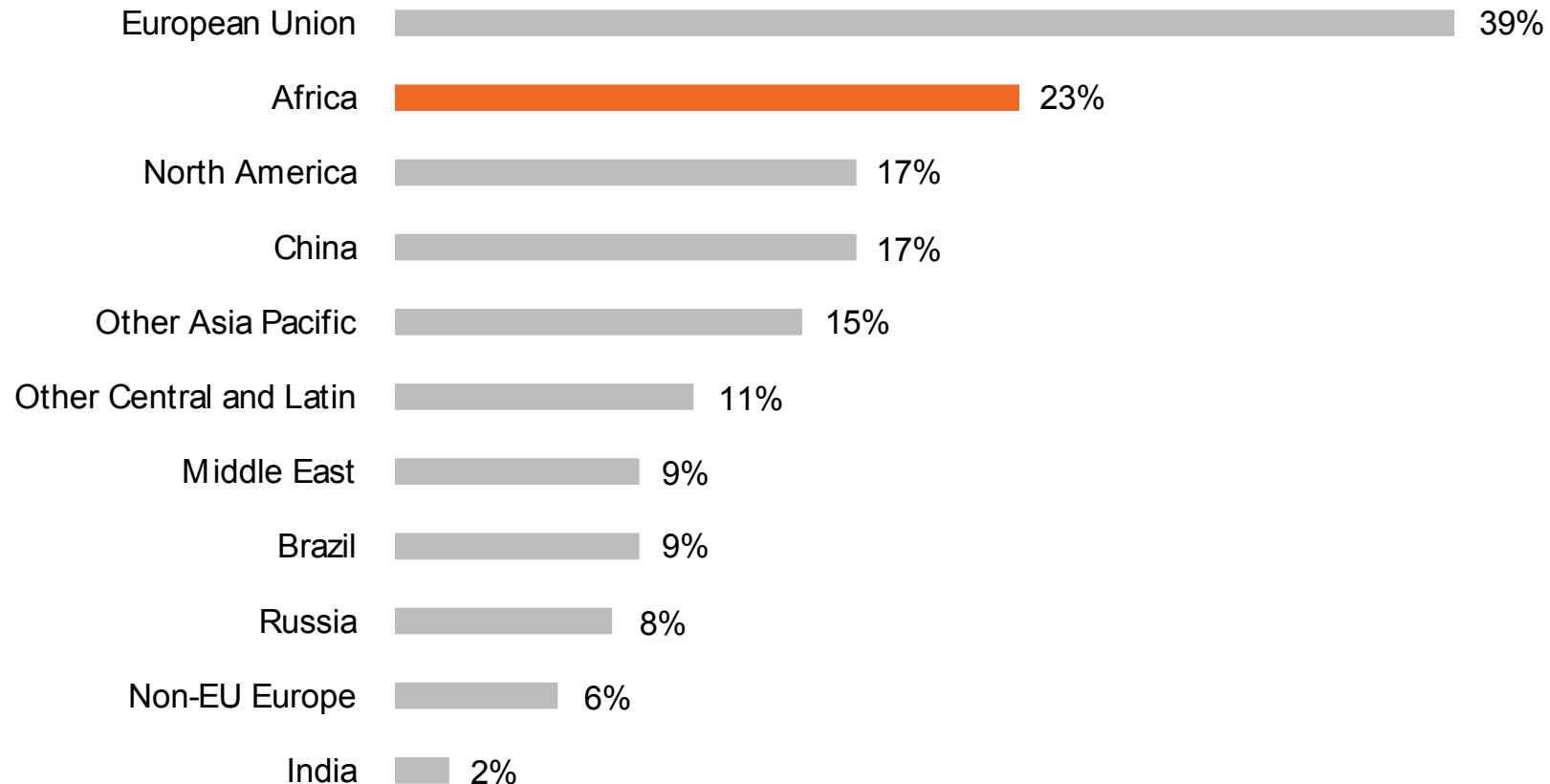
WHEN YOU NEED TO BE SURE

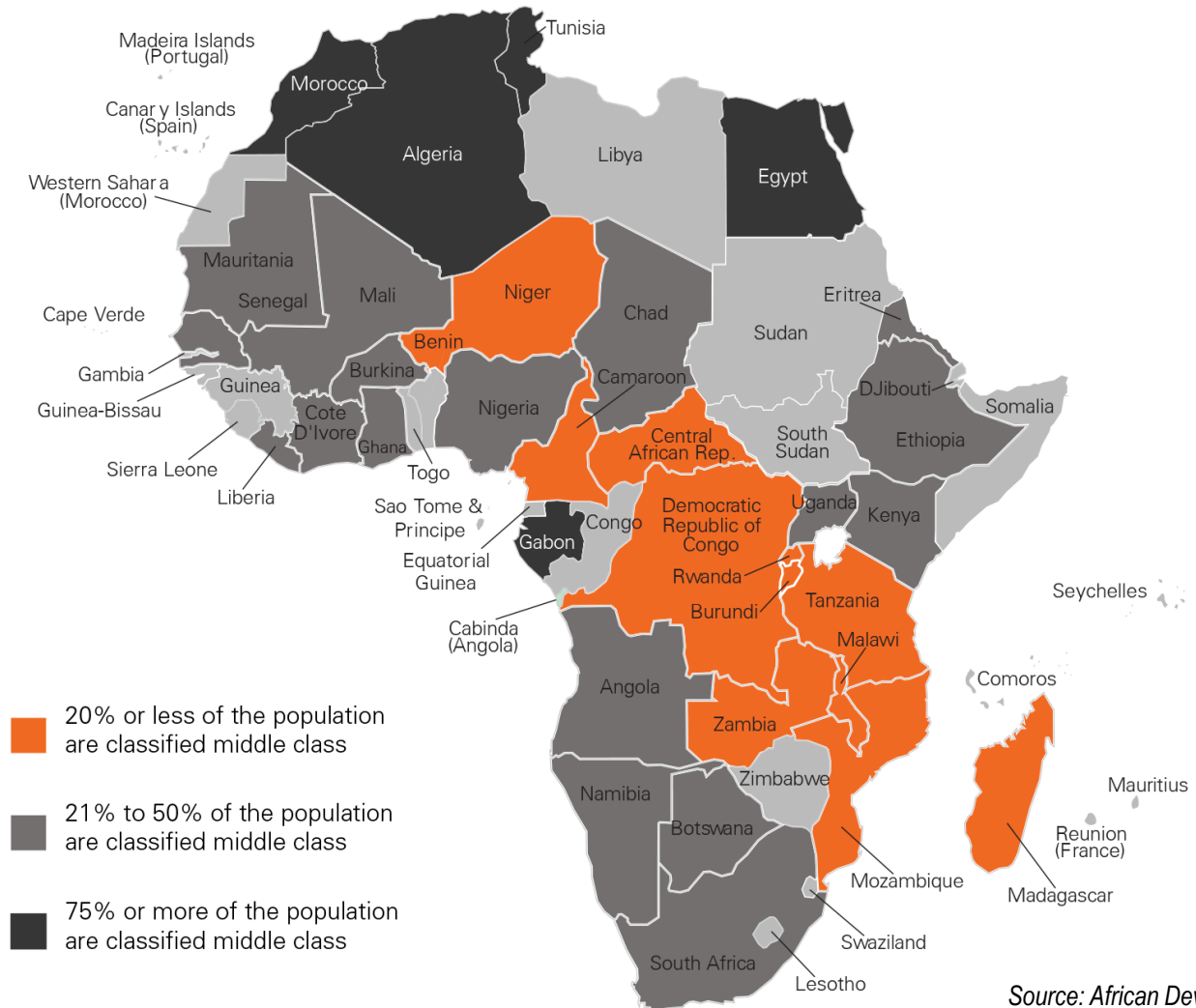


- Significant decline in commodity prices impacts:
 - Investment
 - State revenue and expenditure
 - Export and import
 - Deficit and currency
- Policy shifts on royalties and local content
- Power shortages and economic slowdown
- Unrest and terrorism

- **So, SGS must be suffering too – right?**

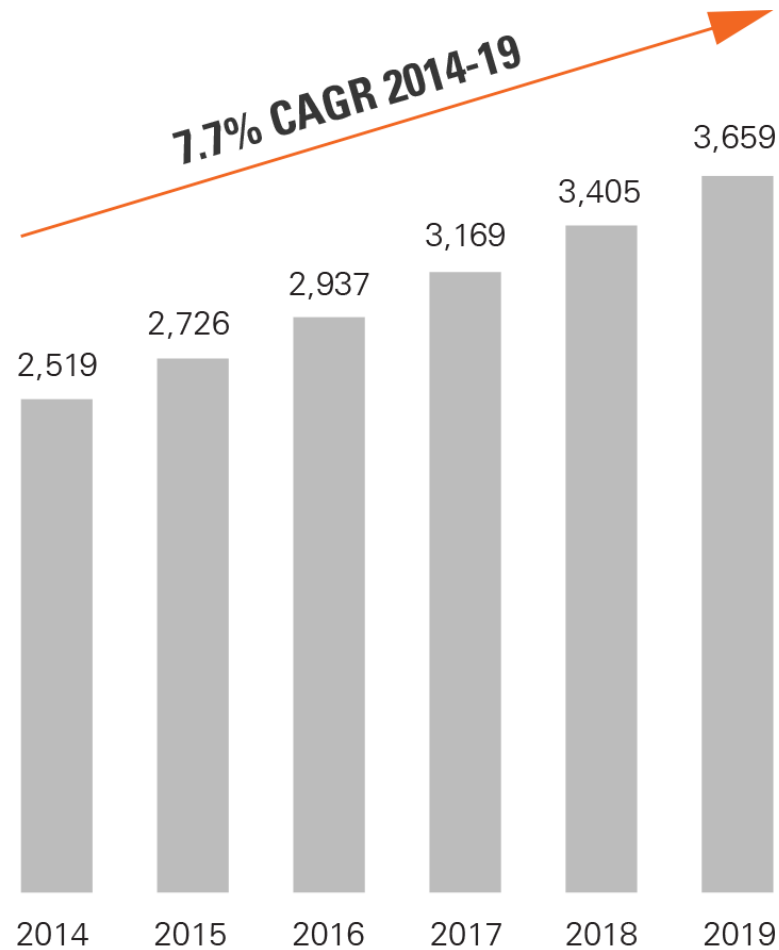
- African investors have tripled their investment
 - Agriculture and food
 - Service industries
- Industrial development
- Reduced dominance of extractive industries:
 - 24% of FDI in 2004
 - Only 5% in 2013
- Retail development, e.g. Carrefour
- E-commerce: 40% growth
- Telecoms: 600 million mobile subscribers
- More new cars imported than used ones in key countries

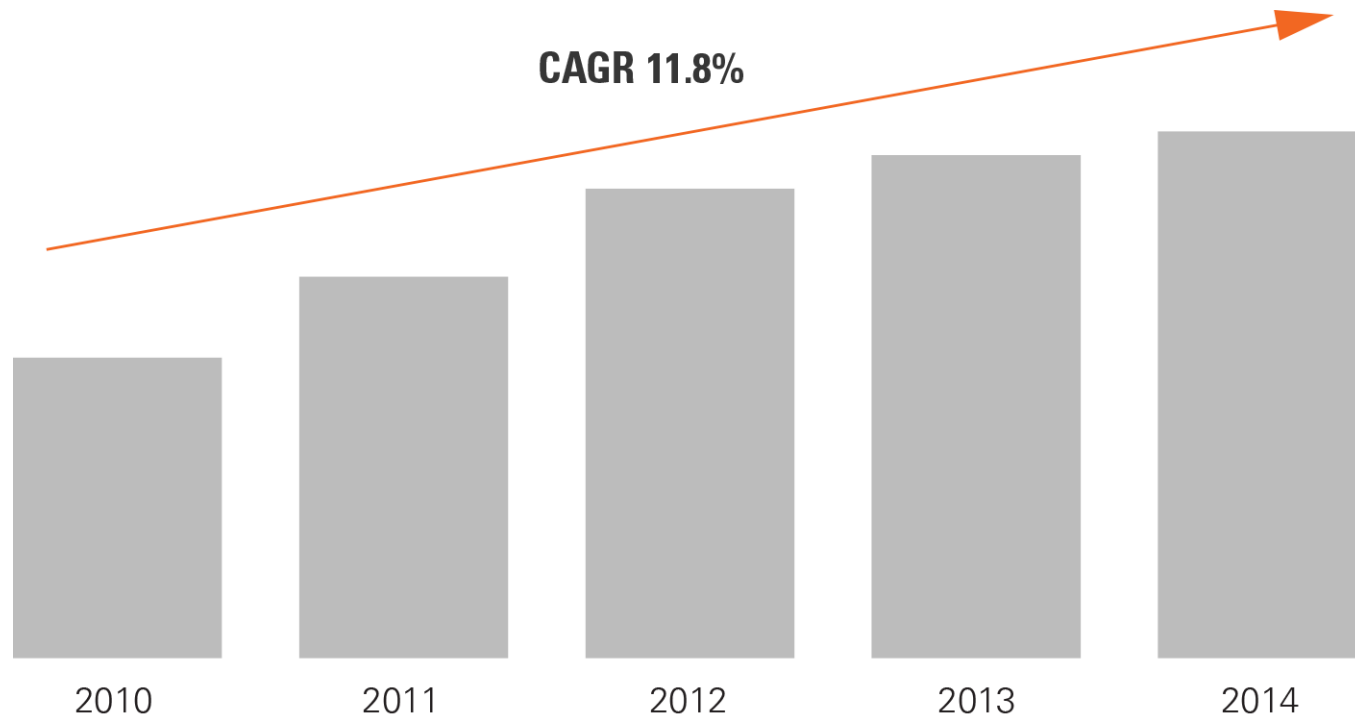




Source: African Development Bank, Deloitte analysis

ECONOMIC GROWTH (USD BILLION)





- Two new fuel marking projects
- New contracts and labs for oil condition monitoring
- 4 new MIN on-site laboratories, including major coal lab in South Africa
- AUTO win in Uganda
- Geographical expansion for IND: Congo, Ivory Coast, Madagascar, Réunion
- Several new contracts to monitor quality at gas stations
- Expansion of DEI activities
- Acquisitions

■ Award of the **innovation prize** 2015:

- Major oil company in Africa
- Tracking and quality program in Ghana
- From tank to gas station:
 - Quality
 - Fraud detection
 - Image protection
- Paving the way for further growth

■ **Drone** for the road:

- MCC USA funding road rehabilitation in Senegal
- Supervision and database by SGS
- High quality images
- Drone from South Africa
- MCC D.C. screen



- Africa is suffering
- Africa is still growing
- Room for innovation and new ideas
- The desire and the need for growth
- Strong potential across businesses





SGS