

ISO 45001 certification, China

# SGS IN ASIA PACIFIC

## Capital Markets Event

19 – 20 November 2024

Garima Batla  
Steven Du  
Olivier Xing

SGS IN ASIA PACIFIC

# Presenters



**Garima Batla**

Business Development,  
Energy Transition



**Steven Du**

Head of Asia Pacific  
Executive Committee

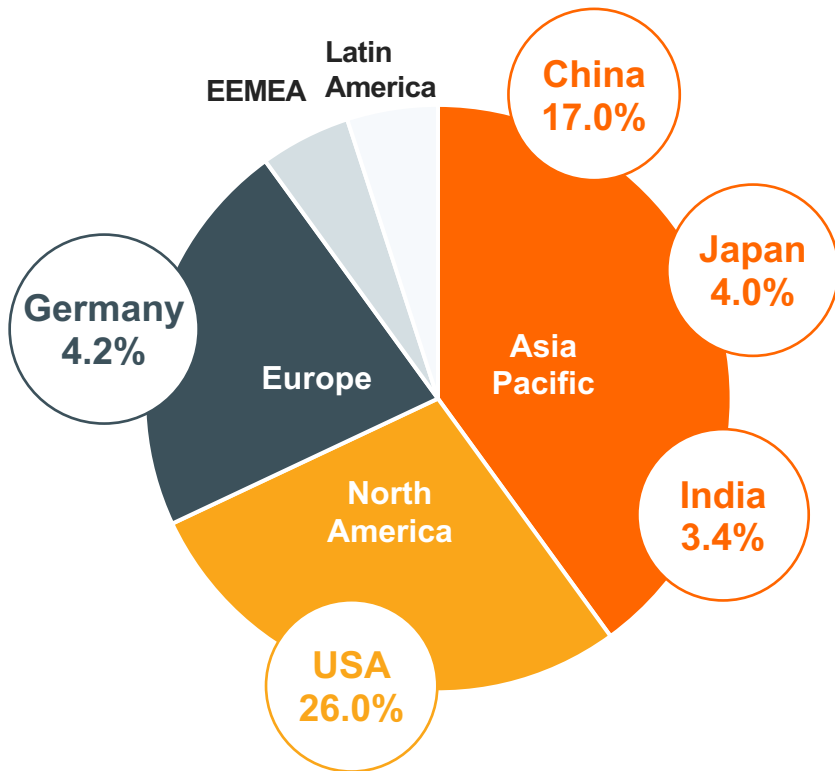


**Olivier Xing**

Regional Industrial Manager

# Asia Pacific represents 33% of addressable TIC market

2023 Global GDP, in %



Source: IMF, World Bank



50% of world population



40% of global GDP



50% of world exports

~33%

of global addressable TIC market in Asia Pacific

# Growing middle-class drives strong demand for quality of life



**1 billion**  
people

to join Asia Pacific  
middle class by 2030



By 2030, Asia represent **2/3**  
of the global middle class population

India  
**380**  
million people

China  
**350**  
million people

Rest  
of the World  
**130**  
million people

Rest  
of Asia  
**210**  
million people

- › People's aspirations for an improved quality of life drive incremental demand for TIC services
- › Local brands:
  - Need support from TIC companies to go international
- › Global brands:
  - Need support from TIC companies to go domestic

# Strong leadership position and opportunities to expand

SGS is N°1  
in Asia  
Pacific

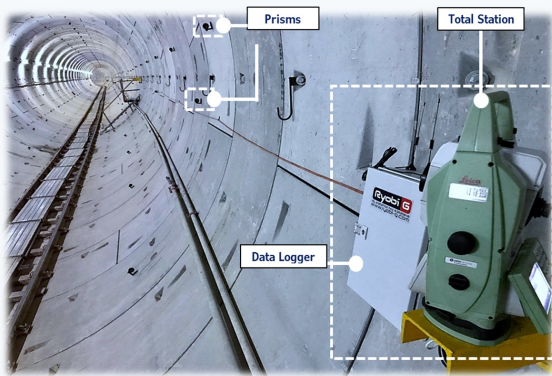
		Natural Resources N° 1	Connectivity & Products N° 1	Business Assurance N° 1	Food N° 1	Industries & Environment N° 2
		✓	✓	✓	✓	✓
	<b>China</b> N° 1	N° 1	N° 1	N° 2*	N° 2	N° 2
	<b>Taiwan</b> N° 1	N° 1	N° 1	N° 1	N° 1	N° 1
	<b>Korea</b> N° 1	N° 1	N° 1	N° 1	N° 1	N° 1
	<b>Hong Kong</b> N° 1	N° 1	N° 2	N° 2*	N° 1	N° 1
	<b>India</b> N° 1	N° 1	N° 2	N° 3	N° 1	Challenger
	<b>Vietnam</b> N° 1	N° 1	N° 2	N° 1	N° 1	Challenger

\* Market leaders are state-owned companies



# Urbanization and transportation infrastructure

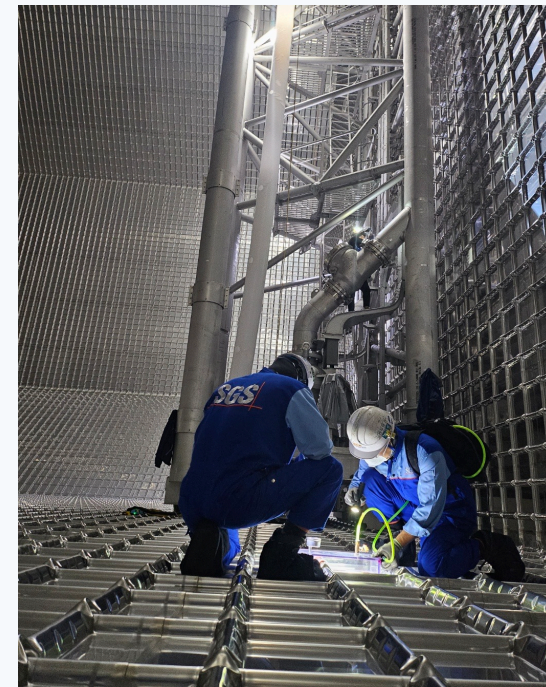
- › Over USD 1.7 trillion/ year expected to be invested into Asian infrastructure until 2030
- › SGS has strong credentials in urban transportation, airport and maritime transportation, gas & water utilities
- › Some key service offerings:
  - › IoT instrumentation & monitoring
  - › Construction materials testing
  - › LNG vessel leakage testing
  - › Town gas pipeline integrity



Tunnel IoT monitoring - Singapore



Airport construction project - Hong Kong



LNG vessel leakage testing - Korea

# Lifetime Asset Management in Building & Facilities

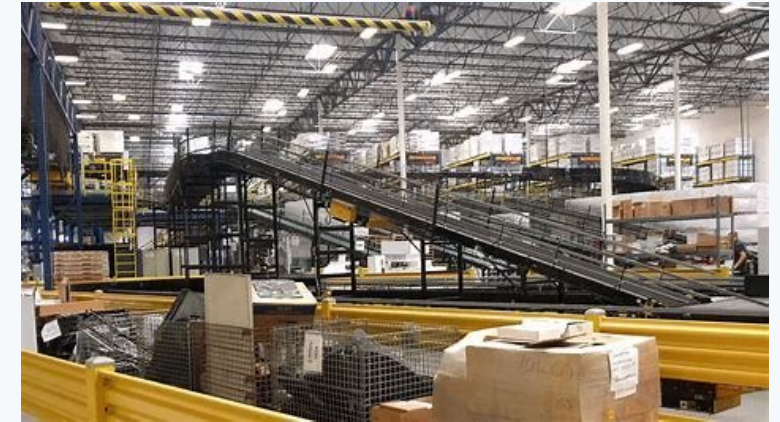
- › Asset Management covers Capex & Opex phases to optimise lifetime ownership costs
- › Industrial facilities, Logistic centre & warehouse, Commercial real estate, Public building
- › Some selected service offerings:
  - › Project Management & Quality assurance
  - › Building Information Modelling (BIM)
  - › Energy saving & Green building
  - › Health & Safety – Environment condition monitoring, machinery safety, fire safety



Maruti-Suzuki Car Mega Plant - India



BIM Digital Modelling – Taiwan



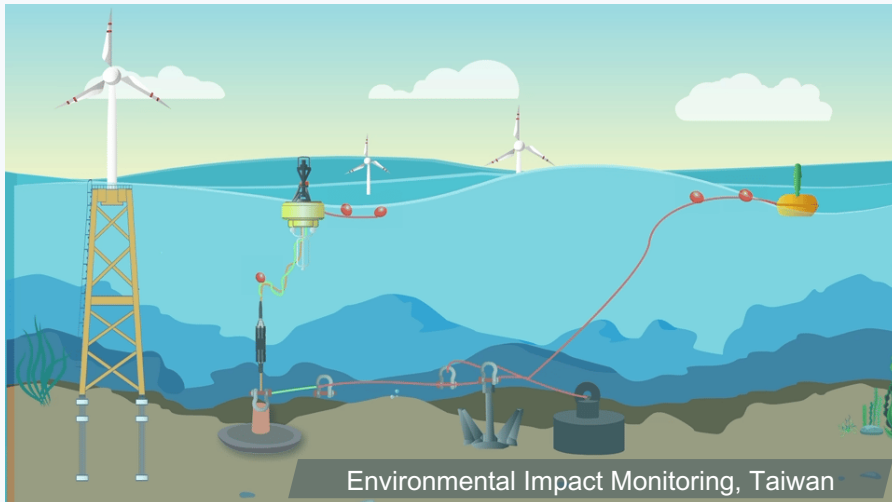
Logistics center safety audit - China



# Energy transition and sustainability



Hydrogen Project, New Zealand



Environmental Impact Monitoring, Taiwan

- › Energy transition is a key driver of the global sustainability trend
- › SGS is ideally positioned to grow in this market, thanks to its global network and unique sustainability offering – IMPACT NOW
- › Some key service offerings:
  - › Safety, energy performance and storage
  - › Quality Assurance/Quality Control supply chain services
  - › Onshore and offshore environmental monitoring
  - › Operational Technology security
  - › Product, module and integrated system certification



# Supply chain migration and industrial structure upgrading



Full Vehicle Antenna Testing, China

- › Asia Pacific remains the biggest manufacturing platform worldwide
- › SGS's global coverage keeps clients within its network, regardless of where they move
- › Strong growth in India, Vietnam and Indonesia driven by supply chain migration
- › Industrial upgrading driven by Asia's transition from high-speed growth to high-quality development
- › Expertise in elevating clients up the value chain

# Key takeaways



**The TIC market in Asia Pacific is large and attractive, supported by growing middle-class and rising regulatory standards**

**SGS is the global TIC leader in Asia Pacific and has significant expansion opportunities**

**Focused strategy to grow in industry, infrastructure, sustainability and digital**





**When you need to be sure**