



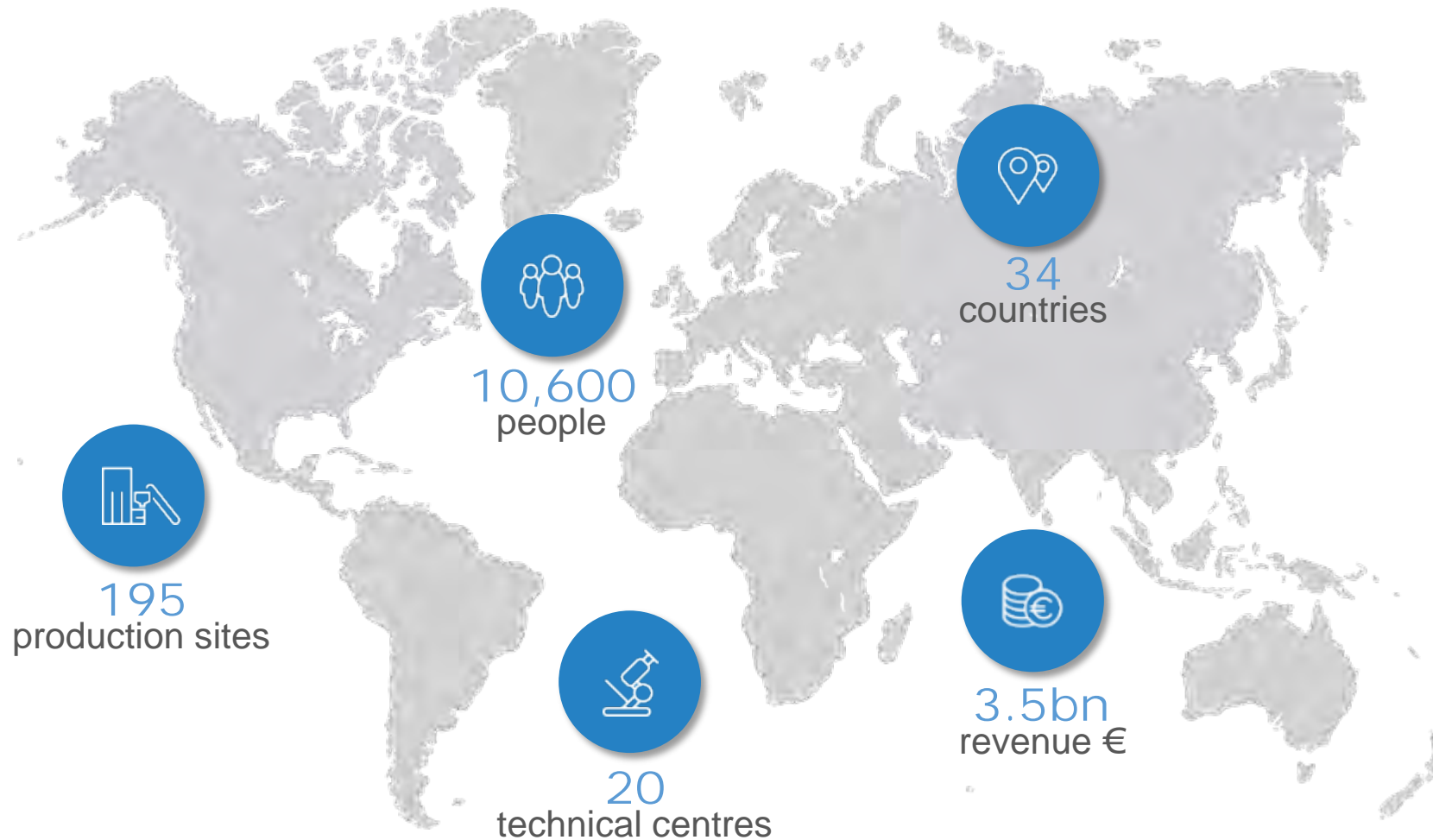
GROUP OVERVIEW

Material solutions advancing life



AT A GLANCE

Founded back in 1872 and still privately-owned, we've grown into a truly multinational material solutions business



MAIN MATERIALS

- Silica
- High purity quartz
- Specialty minerals
- Clays
- Feldspar
- Nepheline syenite
- Olivine
- Cristobalite
- Recycled materials
- Dolomite

OUR PURPOSE



MATERIAL SOLUTIONS ADVANCING LIFE

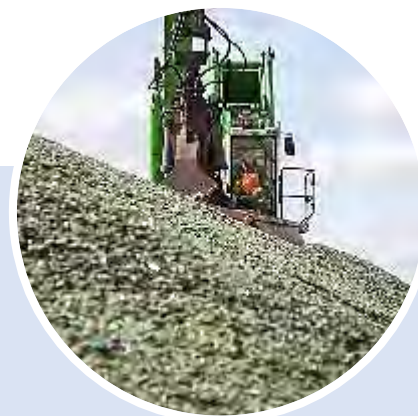
Combining materials, technology and know-how, we create solutions for society's changing needs.



From materials supporting rapid **urbanisation** and society's **need for energy**



to specialist minerals that enable new **digital technologies**



from game changing **glass recycling** technologies helping to combat **climate change**



to minerals helping to provide **food** and **clean water** for a **growing population**

OUR VISION

Our Vision

'To be the best global material solutions company: market-driven, operationally excellent, with a compelling culture'



BEST

Starting with safety and extending into all disciplines, we want to be the best in everything we do.



GLOBAL

We look beyond geographic and functional boundaries to build value as one Sibelco.



MATERIAL SOLUTIONS

Through technology & innovation, we're constantly exploring new opportunities for today and tomorrow.



MARKET DRIVEN

Our strategy and structure are guided by a clear global perspective on our markets and customer needs.



OPERATIONALLY EXCELLENT

We're building consistent standards of excellence across our operations worldwide.



COMPELLING CULTURE

People are the driving force behind our success and our culture is integral to our strategy.

OUR MARKETS

We serve a broad spread of markets via 4 Global Business Units, organised into 14 specialist Business Lines



BUILD ENVIRONMENT

(2018 Revenue: €888m)

- SANITARYWARE & STRUCTURAL CERAMICS
- TILES, ENGOBES & ENGINEERED STONE
- METALLURGY
- OPTIMIZED MATERIALS



COATINGS, POLYMERS & CHEMICAL SOLUTIONS

(2018 Revenue: €244m)

- COATINGS
- POLYMERS
- CHEMICALS



GLASS SOLUTIONS

(2018 Revenue: €463m)

- FLOAT GLASS
- CONTAINER GLASS
- DISPLAY GLASS
- HIGH PURITY GLASS
- FIBER & SPECIALTY GLASS



WATER & ENVIRONMENTAL SOLUTIONS

(2018 Revenue: €109m)

- FILTRATION & REACTANTS
- RECYCLING

SETTING NEW STANDARDS IN SANITARYWARE

BUILD ENVIRONMENT

As the rate of urbanisation quickens, annual sanitaryware production is growing fast, demanding high quality materials to help manufacturers improve both product quality and production yields.

The new SanBlend® V Range of semi-refined plastic clays gives sanitaryware manufacturers additional options through which to improve quality whilst saving costs and reducing carbon emissions through lower energy consumption.



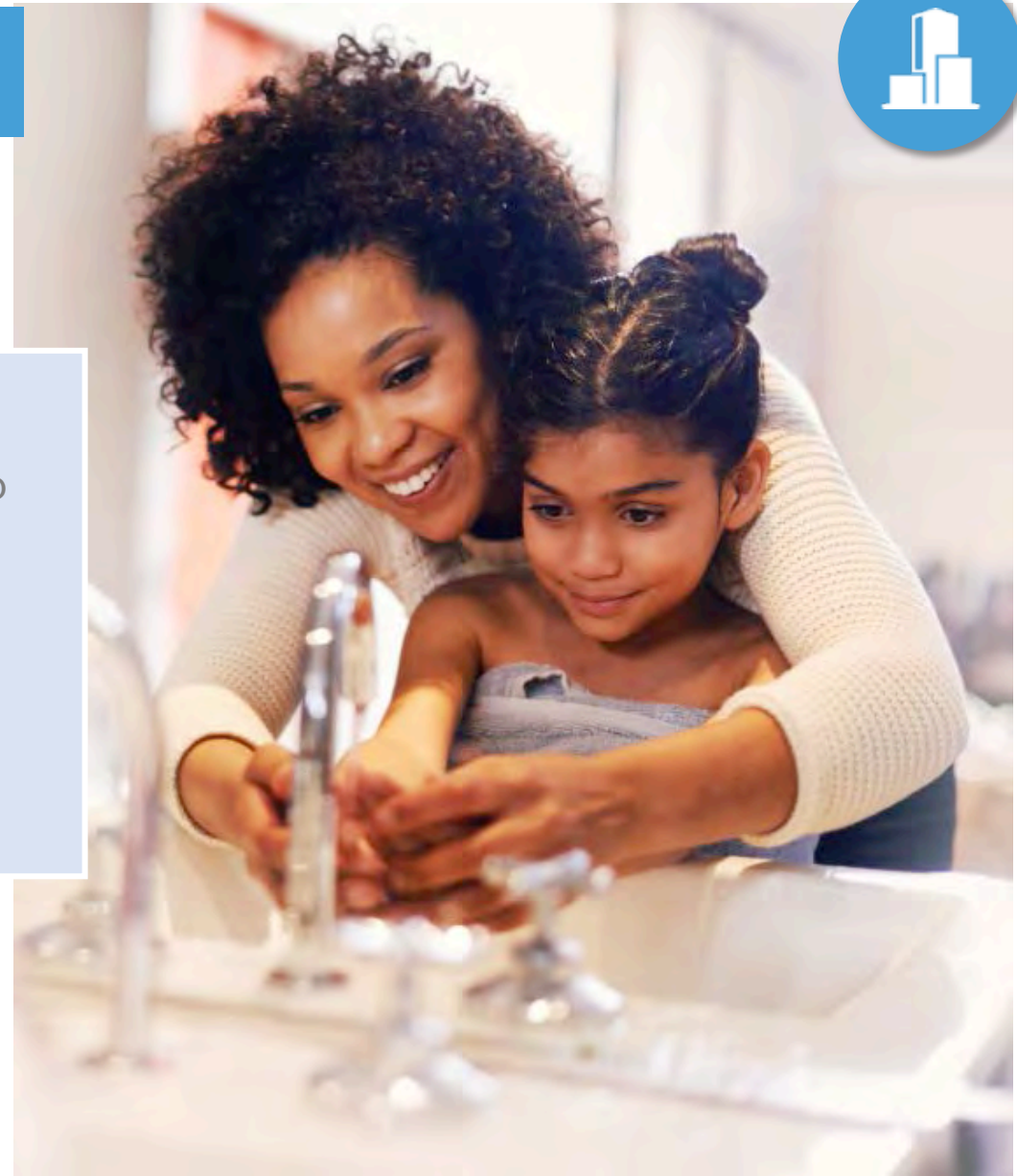
GLOBAL SANITARYWARE PRODUCTION IS FORECAST TO REACH **579 MILLION** PIECES IN 2020, DEMANDING OVER **9 MILLION TONNES** OF MINERALS



PLASTIC CLAY TYPICALLY ACCOUNTS FOR UP TO **25%** OF THE BODY OF A PIECE OF SANITARYWARE



ACCORDING TO THE WORLD HEALTH ORGANISATION, AROUND **2.3 BILLION PEOPLE** STILL LIVE WITHOUT ACCESS TO BASIC SANITATION FACILITIES



PURE ENERGY

GLASS SOLUTIONS

Sibelco's IOTA[®] high purity quartz is playing a key role in solar power, the world's fastest-growing source of new energy.

Within a solar PV unit, IOTA[®] HPQ is used in the production of silicon wafers, which serve as the basis for the solar cell. IOTA[®] is used in approximately 35% of all solar panels produced worldwide.



IN JUST **ONE HOUR** THE SUN DELIVERS ENOUGH ENERGY TO EARTH TO PROVIDE POWER FOR THE GLOBAL POPULATION FOR A **WHOLE YEAR**



IN 2018 PRODUCTION FROM SOLAR INSTALLATIONS WAS APPROXIMATELY **100 GW**, EQUIVALENT TO **100 NUCLEAR REACTORS**



EXPERTS PREDICT THAT RENEWABLES WILL ACCOUNT FOR **30%** OF ELECTRICITY GENERATION **Globally** BY 2022



LIFESAVING MATERIALS

COATINGS, POLYMERS & CHEMICAL SOLUTIONS

Our Portaflame™ and Securoc™ range of flame retardants slow down the rate at which fire burns and reduce smoke toxicity, dramatically increasing the chances of escape from a burning building.

All of our flame retardant solutions are halogen-free, addressing growing health and environmental concerns associated with halogenated flame retardants.



APPROXIMATELY **80%**
OF ALL DEATHS FROM
FIRE OCCUR IN THE
HOME



SMOKE AND **TOXIC
GASES** ARE A BIGGER
KILLER THAN FLAMES



A HOUSE FIRE CAN
BECOME LIFE-
THREATENING IN JUST
2 MINUTES



QUENCHING THE WORLD'S THIRST FOR WATER

WATER & ENVIRONMENTAL SOLUTIONS

As more countries turn to desalination to meet growing demand for potable water, our specialist sands are helping treatment plants to work at optimum efficiency.

Our water filtration portfolio is made up of materials selected against a strict set of criteria including grain size, sphericity, hardness and silica content, all of which have a big impact on filtration effectiveness.



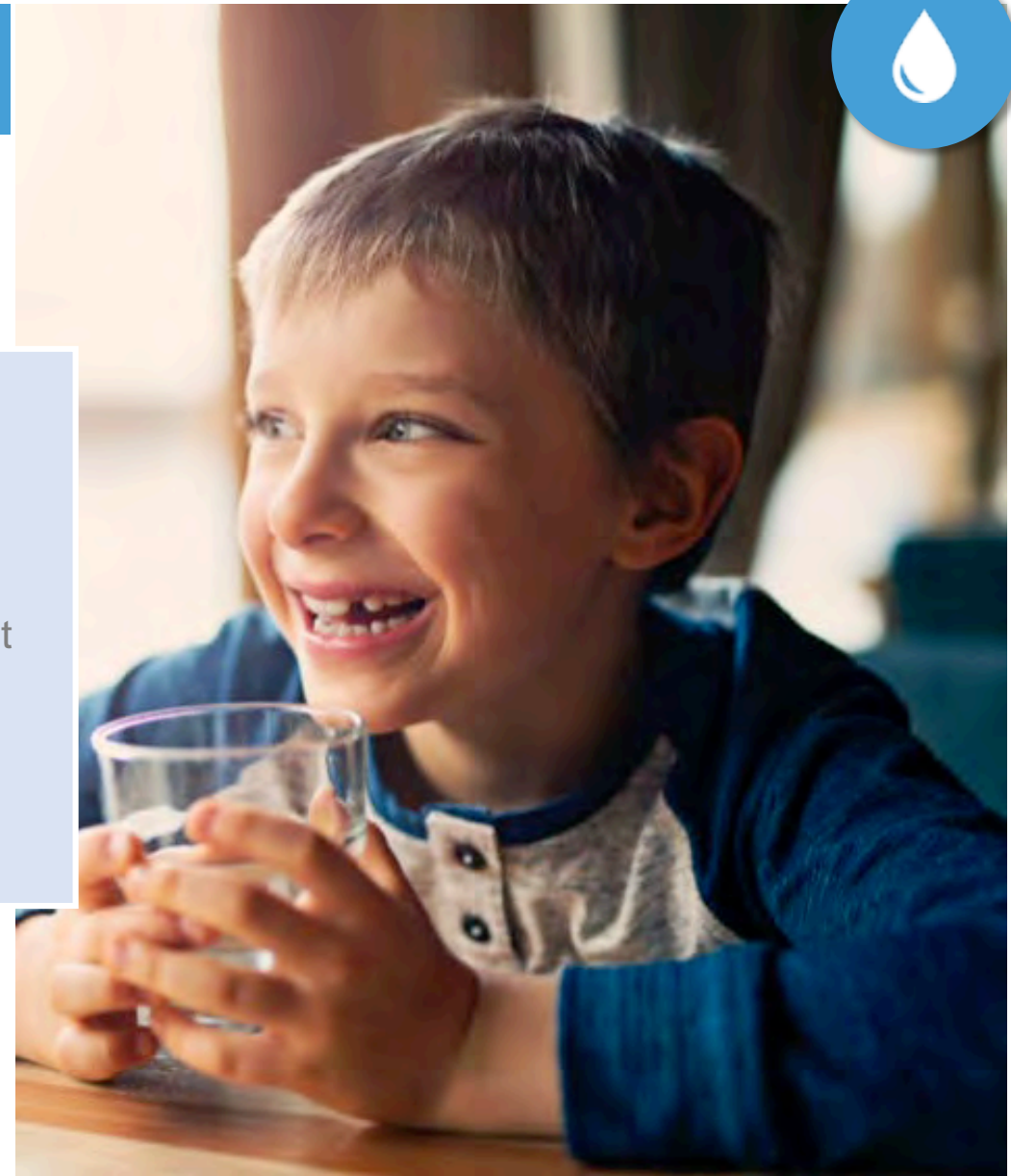
ONLY **2.5%** OF THE WORLD'S WATER RESOURCES ARE FRESH



AGRICULTURE ACCOUNTS FOR **70%** OF GLOBAL WATER USE



50% OF THE WORLD'S POPULATION WILL LIVE IN WATER SCARCE AREAS BY **2050**



COVIA



FORMED THROUGH THE MERGER OF UNIMIN AND FAIRMOUNT SANTROL IN JUNE 2018, COVIA IS A NEW LEADER IN MATERIAL SOLUTIONS FOR THE ENERGY AND INDUSTRIAL MARKETS

- 50 million tons of active production capacity
- 50 processing & coating plants and 90 terminals across North America
- 3,000 people
- a broad portfolio of advanced material solutions
- longstanding base of blue-chip customers



TECHNOLOGY & INNOVATION

Our approach to T&I is based around 3 innovation domains



PROCESS INNOVATION

Securing and improving Sibelco's traditional minerals business through the most efficient and effective exploration, processing and plant technologies.



MATERIAL INNOVATION

Extending our traditional minerals business in line with our Vision to become a leading material solutions provider.



BUSINESS INNOVATION

Creating new business models utilising both internal and external know-how.

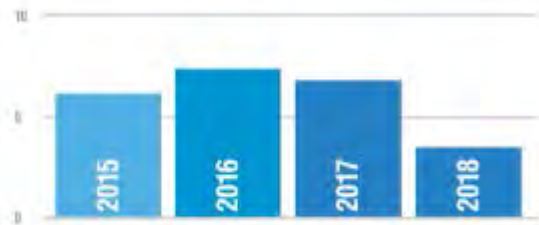


SAFETY & HEALTH



THE WELL-BEING OF OUR PEOPLE COMES BEFORE ANYTHING ELSE. SAFETY AND HEALTH ARE FIRMLY EMBEDDED IN OUR PURPOSE, VISION AND CULTURE.

Combined Incident Frequency Rate



Reportable Incident Rate



OUR PEOPLE



WE ARE PROUD OF OUR PEOPLE AND THEIR CONTRIBUTION TO SIBELCO'S SUCCESS AND WE WANT TO ENSURE THAT OUR GLOBAL TEAM IS DIVERSE AND INCLUSIVE

- our Global Diversity Program is initially focusing on gender equilibrium
- a range of new hiring practices challenge us to attract a wider, more diverse pool of candidates for every role
- new hires for our service functions between December 2017 and October 2018 were made up of 41% males and 59% females
- we recently won an award for Gender Equality at the LC Diversity & Inclusion Awards in Milan



SUSTAINABILITY



WE TAKE A LONG-TERM PERSPECTIVE, ENSURING THAT ECONOMIC PERFORMANCE IS BALANCED WITH ENVIRONMENTAL STEWARDSHIP AND SOCIAL RESPONSIBILITY.

Guided by the **Sibelco Code of Sustainable Conduct**, our approach focuses on five main areas:



LAND
MANAGEMENT



RESOURCE
MANAGEMENT



ENERGY
EFFICIENCY



WATER
MANAGEMENT



LOCAL
PARTNERSHIPS



ENERGY EFFICIENCY

EXAMPLE:



AT OUR PLANT IN DESSEL, 3 GIANT TURBINES GENERATE 21,000 MWH OF CLEAN ENERGY PER YEAR, SIGNIFICANTLY REDUCING THE CARBON FOOTPRINT OF OUR LOCAL OPERATIONS.

- a second project, incorporating seven turbines at our site in Lommel, Belgium, is in the final stages of permitting
- an innovative new floating solar park at Dessel which will generate over 4,500 MWH of green electricity each year is in development
- more renewable projects are underway at Sibelco sites worldwide



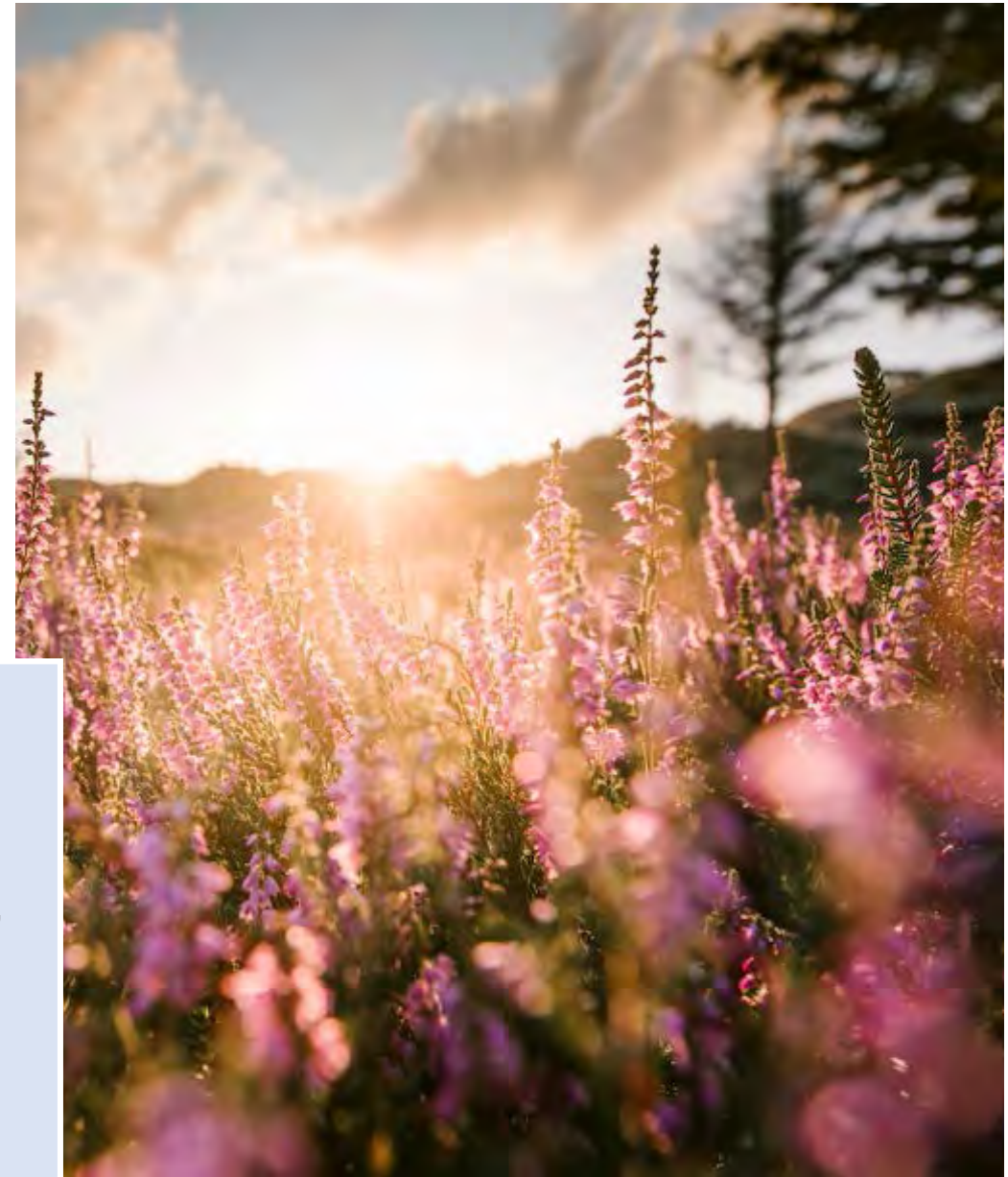
LAND MANAGEMENT

EXAMPLE:



OUR AWARD-WINNING HEATHLAND RESTORATION PROGRAM IS HELPING TO CONSERVE AN IMPORTANT PART OF EUROPE'S NATURAL AND CULTURAL LANDSCAPE.

- heathlands are under threat - it is estimated that around 85% of lowland heathland has been lost over the past 150 years
- as part of our 'whole of life approach' to quarry management, we are creating over 180 hectares of new heathland habitats across Belgium, UK, France and the Netherlands
- our Heathland Restoration Program won an award from the Industrial Minerals Association of Europe, collecting first prize in the Biodiversity & Ecosystem Services category



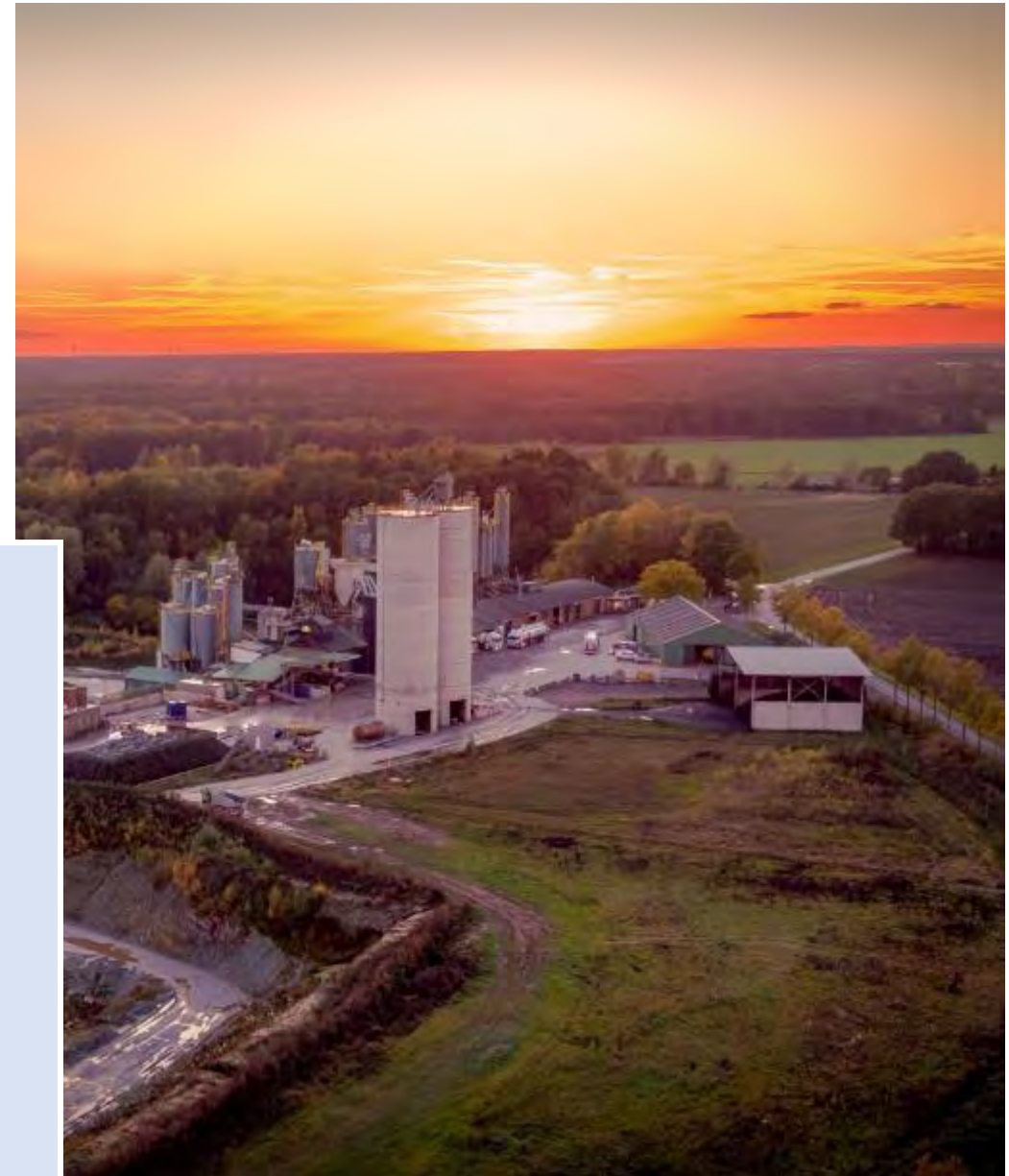
LOCAL PARTNERSHIPS

EXAMPLE:



WINTERSWIJK'S LOCAL STAKEHOLDER ENGAGEMENT PROGRAM LOOKS BEYOND TODAY

- like all Sibelco sites, Winterswijk (NL) operates within a framework that seeks to make a positive contribution to the environment and the local community
- rehabilitation of a former quarry zone has created a haven for a diverse range of wildlife including salamanders, eagle owls and butterflies
- to support local tourism, we regularly open the quarry as a spectacular setting for activities & events
- the site is famous for fossils and we have developed close ties with universities undertaking geological and palaeontology studies





THANK YOU

Material solutions advancing life

