SGS INVESTOR DAYS 23-24 SEPTEMBER 2010, ROUEN

MINING@SGS

Mike Belton – EVP Minerals Services

September 2010

WHEN YOU NEED TO BE SURE

SGS

A SUSTAINABLE BUSINESS



- Since 1878 SGS has shown itself to be a sustainable business based on its core values of:
  - TRUST
  - PROFESSIONAL EXCELLENCE
  - DELIVERING SOLUTIONS FOR OUR CLIENTS
- The Global Mining Industry now has to exhibit and work within sustainable business practices in all locations at which it wants to extract and process minerals
- A pre-requisite for mine approval is a sustainable mine plan including environmental impact studies and reclamation plans

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UNDERLYING DEMAND



- Projections for population growth, urbanisation and increases in disposable income in developing nations will drive an unprecedented period of demand for Industrial Metals and Energy Minerals
- To stay ahead of this demand curve, mining companies and government / private infrastructure investments, in both producing and consuming countries, are going to have to increase significantly
- This will all need to take place against a back-drop of greater concerns about the sustainable use of the world resources, global warming and a tightening of environmental standards and regulations
- Companies engaged in this development cycle are going to need trusted partners who can work with them to deliver solutions to the many varied problems they will have to address

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BROAD SPECTRUM OF SERVICES



- Environmental Impact Studies
- Pre-feasibility and Feasibility studies
- Project Finance and Project Monitoring
- Environmental Certification
- Acid Rock Drainage studies and planning
- Block Modelling and Production Forecasting
- Mine Reclamation Plans

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CROSS LINKED SERVICES



- Multiple SGS Business Lines working together to provide integrated solutions for the Mining Industry
  - Environmental / Industrial / SSC / Minerals Services
- Basic testing data:
  - Geology
  - Mineralogy
  - Chemical analysis
  - Physical test parameters
  - Metallurgical flowsheet design
  - *Can be linked together through value adding predictive models to reduce uncertainty and minimize project risk*

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BRAND AND NETWORK



- As the SGS Brand stands for technical expertise and independence, all the varied parties that have an interest in a mine project (investors, regulators, local communities etc..) view SGS as an impartial provider of high quality data.
- Our Global Network allows us to serve multinational clients at multiple service locations using standardized procedures, data sets and reporting formats
  - We think globally and act locally

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WHAT MAKES SGS THE PARTNER OF CHOICE IN THE MINING INDUSTRY



- The scope and range of our service offering which covers all possible technical, financial and environmental risks associated with the industry
- The fact that we have moved beyond being a testing company to being a trusted, intellectually diverse partner who interprets and models data using this value adding knowledge to design and implement solutions
- Our willingness to invest capital, human resources and expertise into life of mine / plant operations
- The fact that our clients know and appreciate that SGS has been a long term players in the mining industry through both boom and bust cycles

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MANAGEMENT AND TECHNICAL EXPERTISE



- Our senior management are seen by their peers in major and junior mining companies as being the experts in their field of knowledge
- We have technical expertise which covers the range of industrial metals and energy minerals
- Our people have experience in working in all the existing and developing mining regions of the world
- We have real world mine and plant experience and combine this with pilot plant and laboratory expertise
- We attract best in class talent base on the quality and scope of our testing infrastructure

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THE FUTURE IN BRIGHT



- Our intent is to remain as the clear market leader in the sector of technical services to the mining industry
- We will continue to develop and roll out across our network, new and innovative service offerings
- We will develop our service mix to ensure overall margin enhancement whilst integrating our traditional services to protect them from commodity pricing pressures
- The Mining Industry will find sustainable ways to deliver the raw materials needed to support global growth trends
- SGS will be partnered with all best in class entities who come together to deliver sustainable minerals extraction and processing

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2014 FOR THE COMPLETE PICTURE

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