OIL, GAS AND CHEMICALS: PAST, PRESENT AND FUTURE

Alim Saidov
EVP Oil, Gas & Chemicals

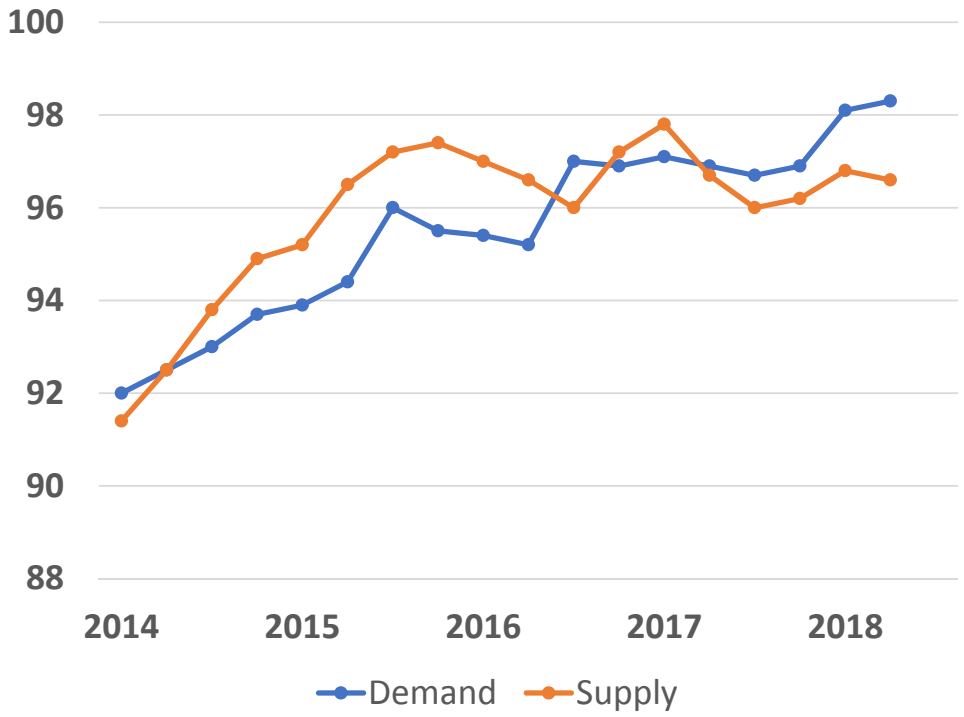
Investor Days 2018, Bordeaux



WHEN YOU NEED TO BE SURE

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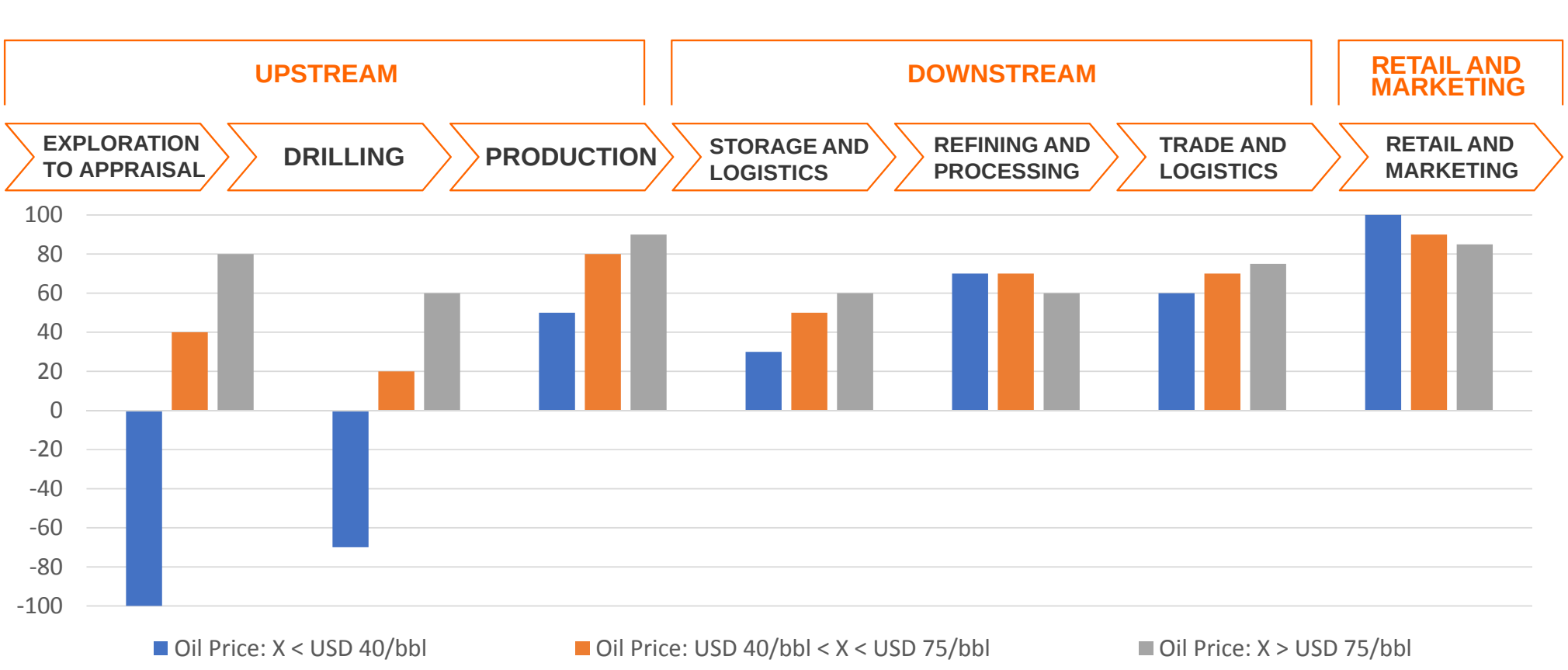
OIL AND GAS INDUSTRY
SUPPLY AND DEMAND



- **DEPRESSION - COMFORT - CONFIDENCE EVOLUTION**
  - The industry is still largely affected by political decisions driving oil price up and down with no economical justification
  - Positive momentum achieved in bringing the operating costs down to bare minimum

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OIL AND GAS INDUSTRY
MAJOR SEGMENT RESILIENCE TO OIL PRICE



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OIL, GAS AND CHEMICALS
ACROSS THE VALUE CHAIN

SGS INVESTOR DAYS BORDEAUX 8-9 NOVEMBER 2018

	UPSTREAM			DOWNSTREAM			RETAIL AND MARKETING
	EXPLORATION TO APPRAISAL	DRILLING	PRODUCTION	STORAGE AND LOGISTICS	REFINING AND PROCESSING	TRADE AND LOGISTICS	RETAIL AND MARKETING
SERVICES							
Subsurface Consultancy	✓	✓	✓				
Well Testing Services	✓		✓				
Cased Hole Services			✓				
Production Fluids Testing	✓		✓				
Metering and Measurement Consulting			✓	✓	✓	✓	✓
Tools	✓	✓	✓				
Wellhead Services			✓				
Rock Properties Testing	✓	✓					
Trade Related Services				✓	✓	✓	
Non-Inspection Related Testing		✓	✓	✓	✓		✓
Lab Outsourcing Solutions		✓	✓	✓	✓		✓
Plant and Terminal Operations				✓	✓	✓	✓
Metering and Instrumentation			✓	✓	✓	✓	✓
Oil Condition Monitoring	✓	✓				✓	✓
Sample Management Services	✓		✓			✓	✓
Fuel Integrity Services						✓	✓
Cargo Treatment Services					✓	✓	✓
Data Services	✓				✓	✓	✓

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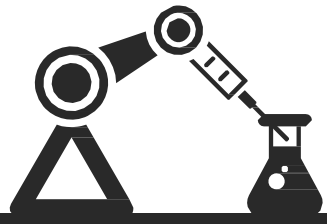
OIL, GAS AND CHEMICALS
UPSTREAM

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PRODUCTION

- WELL TESTING
- CASED HOLE / WELL INTEGRITY
- FLOW ASSURANCE / PRODUCTION FLUIDS TESTING
- METERING SYSTEMS DESIGN AND COMMISSIONING
- FISCAL AND ROUTINE HYDROCARBON ALLOCATION





OIL, GAS AND CHEMICALS
UPSTREAM

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EXPLORATION

- **GEOSCIENCE SERVICES**
- **GEOLOGICAL ANALYSIS**
- **PETROPHYSICAL SERVICES**
- **RESERVOIR ENGINEERING SERVICES**
- **RESERVOIR FLUIDS STUDIES – LAND BASED AND MOBILE**





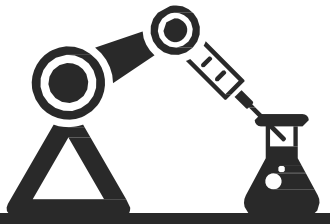
OIL, GAS AND CHEMICALS
UPSTREAM

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INNOVATION

- **GAS LIFT DIAGNOSTICS AND OPTIMISATION**
- **WELL INTEGRITY SOLUTIONS / MICROBIAL AND DNA TECNOLOGY**
- **WET GAS METERING SOLUTIONS**





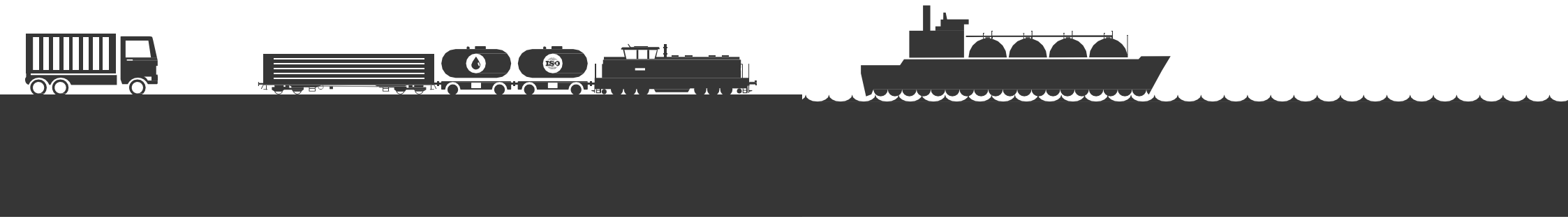
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OIL, GAS AND CHEMICALS
STORAGE AND LOGISTICS

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STORAGE AND LOGISTICS

- METERING AND MEASUREMENT CONSULTING
- NON-INSPECTION RELATED TESTING
- LAB OUTSOURCING SOLUTIONS
- PLANT AND TERMINAL OPERATIONS

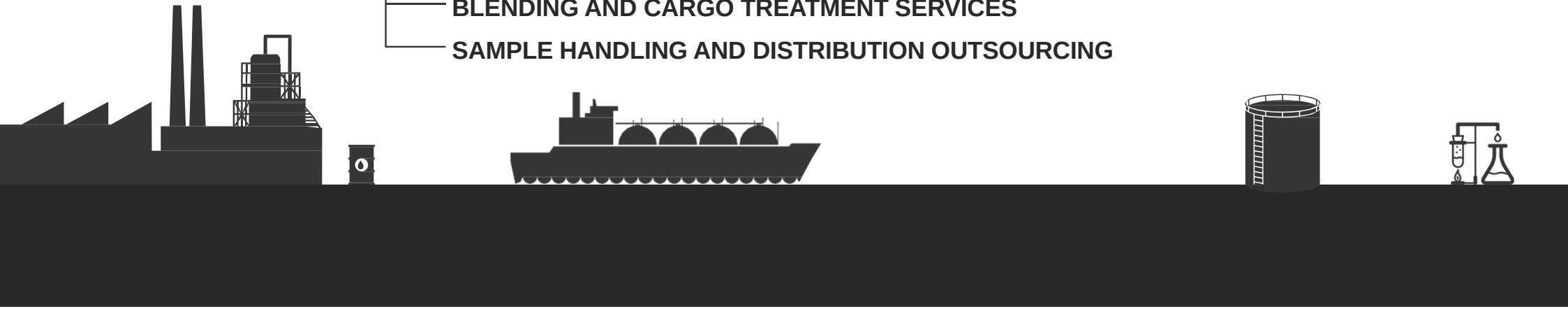


OIL, GAS AND CHEMICALS
DOWNSTREAM

SGS INVESTOR DAYS BORDEAUX 8-9 NOVEMBER 2018

REFINING AND PROCESSING

- **MEASUREMENT, SAMPLING AND TESTING**
- **LABORATORY DESIGN, COMMISSIONING AND OUTSOURCING**
- **OUTSOURCED PLANT AND TERMINAL OPERATIONS**
- **METERING AND CALIBRATION**
- **BLENDING AND CARGO TREATMENT SERVICES**
- **SAMPLE HANDLING AND DISTRIBUTION OUTSOURCING**



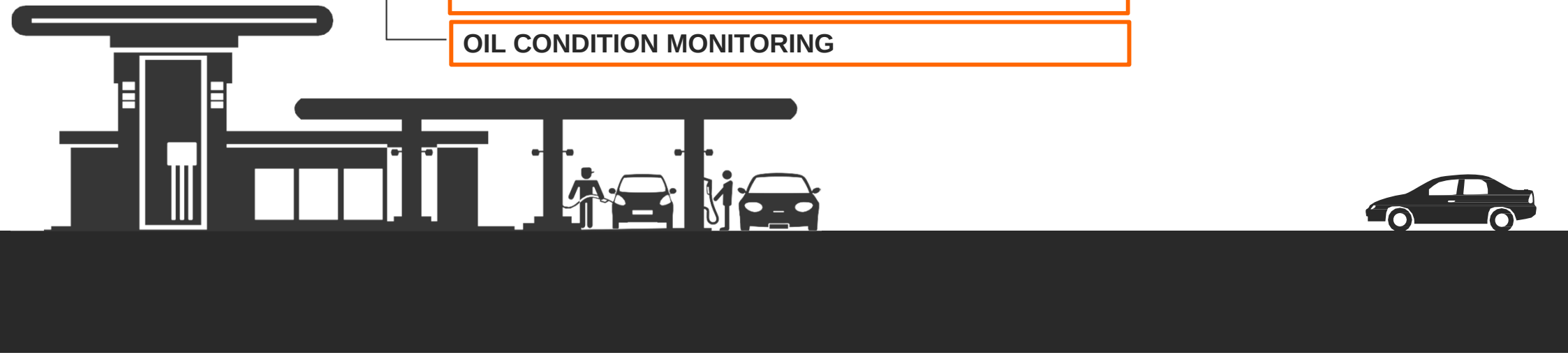
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OIL, GAS AND CHEMICALS
FUEL RETAIL SERVICES

SGS INVESTOR DAYS BORDEAUX 8-9 NOVEMBER 2018

DISTRIBUTION AND RETAIL

- **FUEL RETAIL SERVICES**
- **FUEL INTEGRITY PPROGRAMS**
- **WET STOCK MANAGEMENT**
- **DATA SERVICES**
- **OIL CONDITION MONITORING**



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WHEN YOU NEED TO BE SURE

