

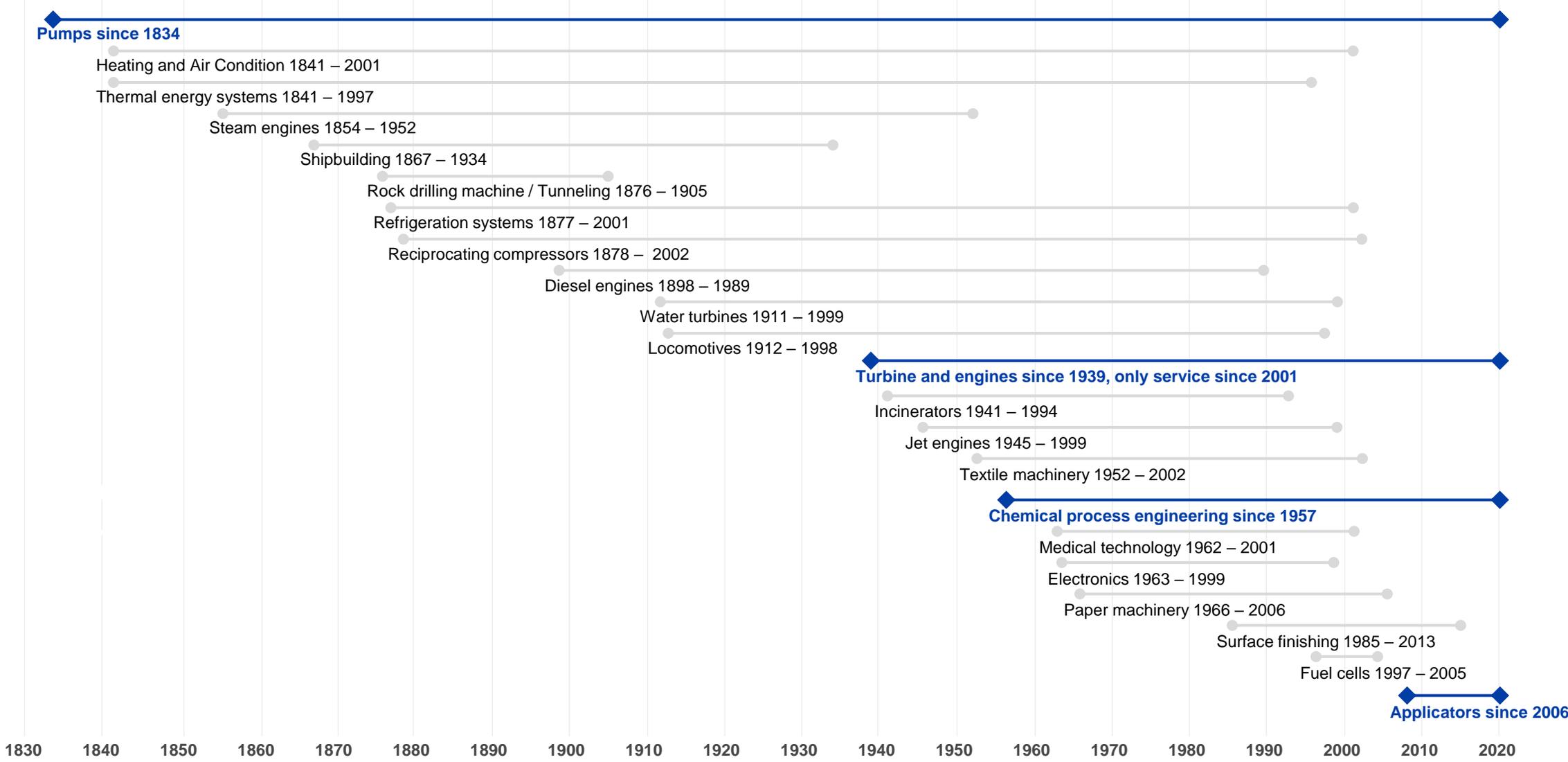
SULZER

Business portfolio evolution in the era of digital and sustainability

HAW Annual General Meeting – May 11, 2021

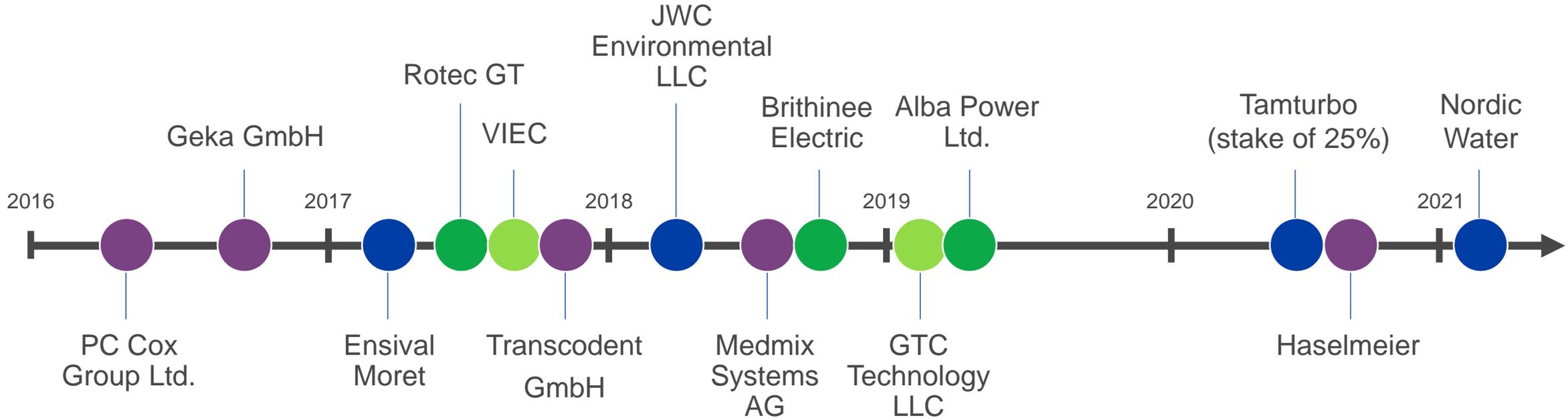


Technology incubator since 1834



Recent acquisitions

Strengthening our product portfolio in key areas



Sulzer today

Sulzer offers products, services and know-how for a wide range of **fluid engineering** applications in many different markets



38%



33%



18%



11%



18%

15%

Pumps Equipment

From standard pumps to highly engineered pumps, covering Water, Oil & Gas, Power, Mining, Pulp & Paper, etc.

Rotating Equipment Services

Parts, service and refurbishment for pumps, turbines, compressors, motors & drives, etc.

Chemtech

Separation technology and associated services for the chemical processing and refining industries

Applicator Systems

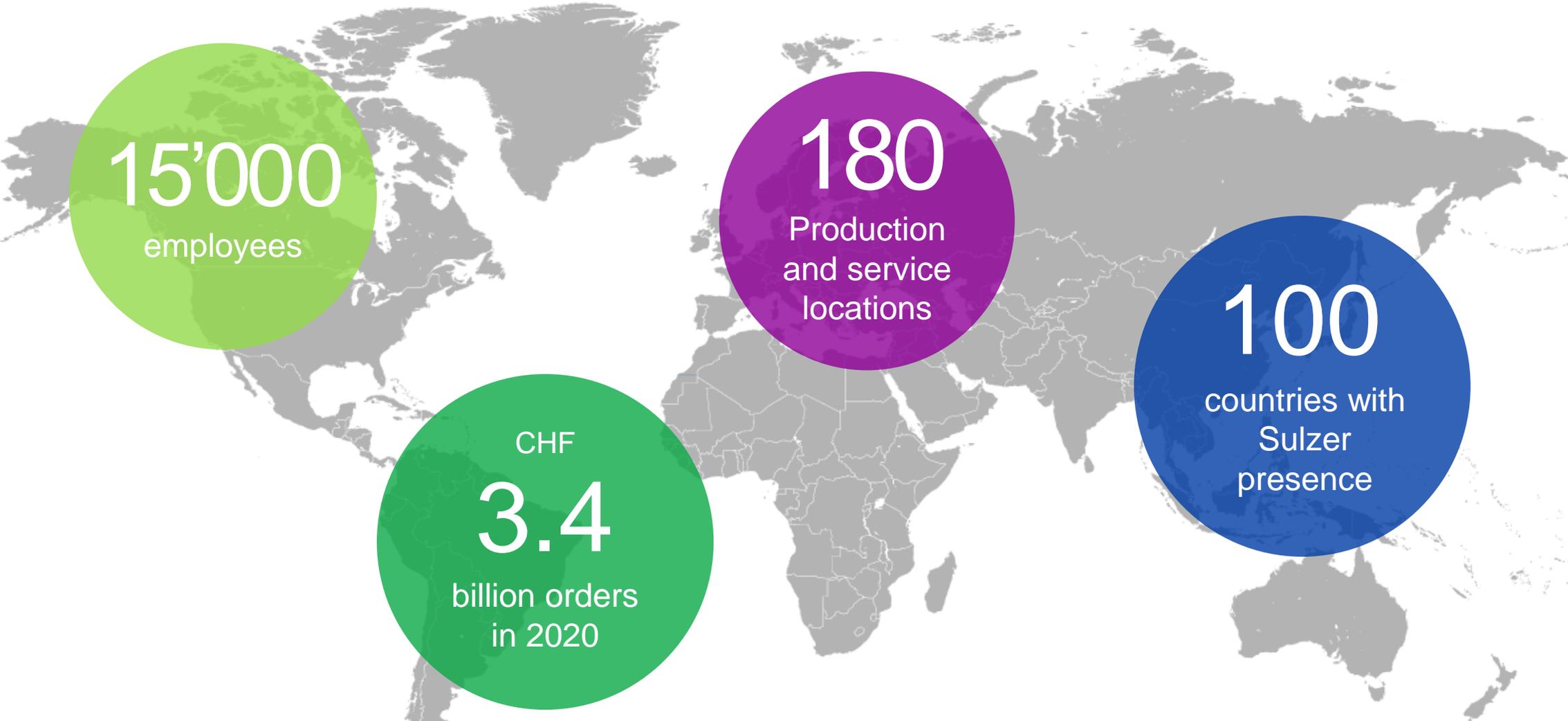
Specialized fluid applicators for dental, healthcare, beauty, construction, adhesives, etc.

X% of total order intake 2020 of CHF 3'414m

y% of total divisional opEBITA 2020 of CHF 307m

Global and agile

We combine reach with responsiveness



Our leadership team



Armand Sohet
Chief Human
Resources Officer



Daniel Bischofberger
Division President
Rotating Equipment
Services



Jill Lee
CFO



Greg Poux-Guillaume
CEO



Torsten Wintergerste
Division President
Chemtech



Frédéric Lalanne
Division President
Pumps Equipment



Girts Cimermans
Division President
Applicator Systems

Sustainability at Sulzer

A three-pillar approach

MSCI
ESG RATINGS



CCC B BB BBB A AA AAA

LAST UPDATE: February 12, 2021

SULZER

Minimize

our carbon footprint

We operate in a sustainable way

Enable

a low carbon society

We contribute to a circular economy

Engage

our employees and communities

We make life better for those around us

A photograph of a Sulzer HST turbocompressor. The machine is large, industrial, and painted in blue and grey. It has several pipes and valves attached to it. The background shows a clean, well-lit industrial environment.

Wastewater treatment

Most energy efficient wastewater treatment

Sulzer's compressors for aeration minimize environmental impact

An aerial photograph of a wastewater treatment plant's aeration tank. The tank is a large, rectangular concrete structure filled with water. Several long, narrow metal bridges or walkways cross the tank, supported by pillars. The water appears calm and blue.

Due to its innovative design, the small-footprint HST turbocompressor has no wearing parts nor lubricants, thus requiring **minimal maintenance.**

A photograph of a wastewater treatment plant's aeration tank, similar to the one in the previous block. It shows the concrete structure, metal walkways, and the water inside. The lighting is bright, and the overall scene is industrial.

The unique drive technology enables reliable operation and top efficiency at the lowest cost while **minimized energy consumption.**

Desalination

A photograph showing several large industrial pumps from Sulzer in a factory setting. The pumps are mounted on blue bases and have various components like motors and pipes. One pump has a prominent yellow circular cover.

Fighting water shortage and supplying freshwater

A close-up photograph of water splashing into a glass. The water is clear and blue, with many bubbles and droplets visible. The background is dark and out of focus.

In a world where roughly 2 billion people have no access to clean water fighting water shortage and supplying freshwater is crucial.

Seawater desalination is an important means of providing a sustainable supply of freshwater.

Sulzer's pumps for seawater desalination are market leaders in terms of efficiency.

Our equipment is used in installations around the globe supplying more than 3 million m³ of freshwater per day.

Freshwater

Water for the Sahara desert

Transporting millions of liters over hundreds of kilometers



A local government contacted Sulzer with the challenge of supplying water to a remote location in the Sahara desert.

What is the best way to transport 100 million liters per day over a distance of 740km?

Sulzer engineered 18 pumps to efficiently and cost-effectively transport water through a pipeline into the city. The pumps are especially easy to operate and maintain.

Sulzer is digital

BlueBox™, Sulzer's **advanced data analytics** platform for flow control, wins the 2018 Digital Economy Gold Award

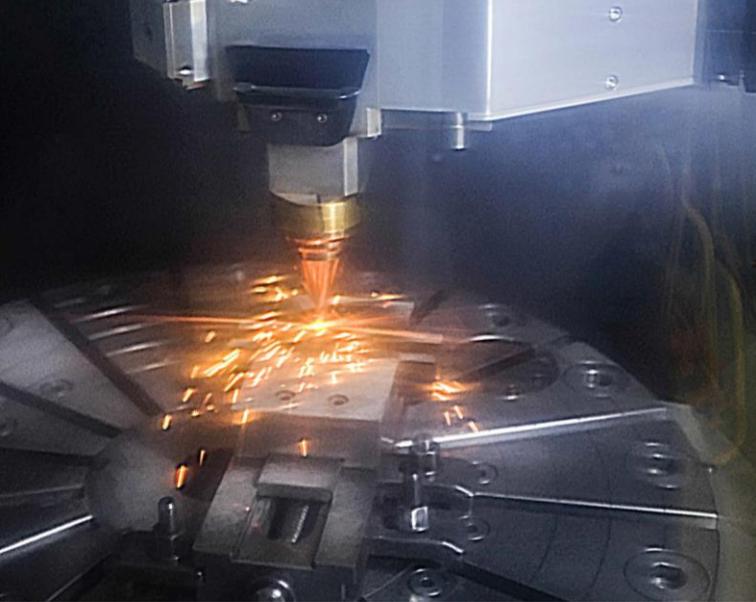


Sulzer designed BLUE BOX to be implemented with a **minimal impact** on a customer's site. It analyzes their existing data, utilizing machine learning. It **enables customers** to apply **proactive asset management** strategies, resulting in improved **equipment efficiency** and optimized **plant uptime**.

Sulzer is implementing BLUE BOX globally on critical **pump assets** across industries including; **Water, Oil & Gas, Power generation, and Mining**.

BLUE BOX is the foundation for **Sulzer's IoT and analytics strategy** across its extensive portfolio of products, services and operations.

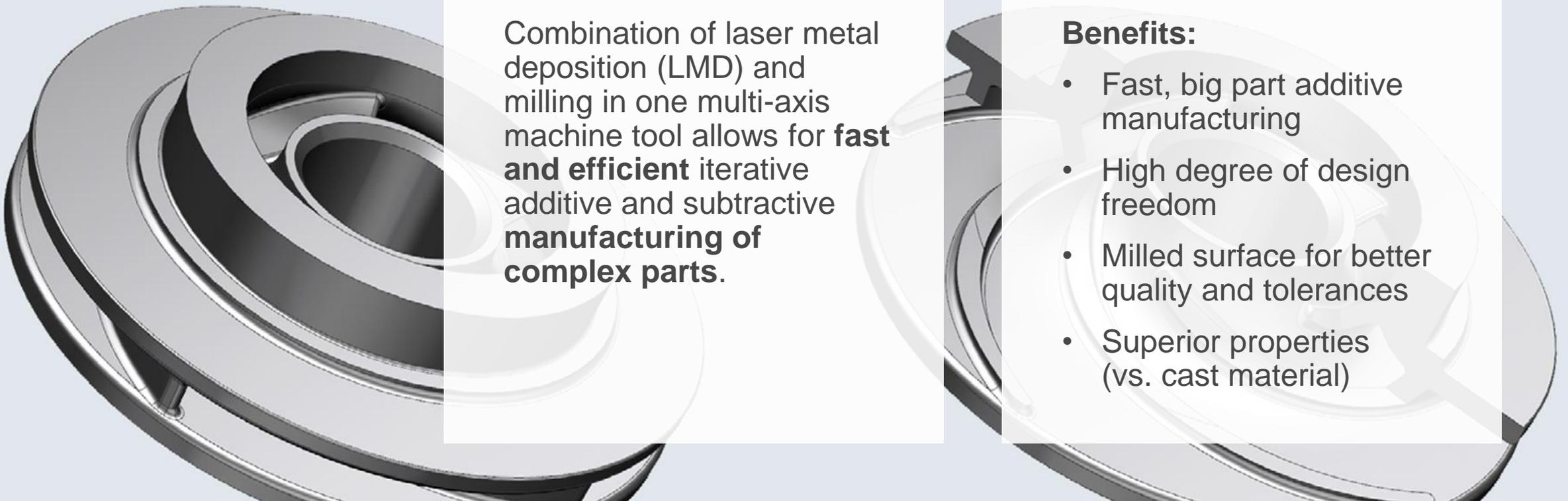
#sulzerdigital, #sulzerbluebox



Next generation parts

Hybrid manufacturing

Innovation for faster parts delivery



Combination of laser metal deposition (LMD) and milling in one multi-axis machine tool allows for **fast and efficient** iterative additive and subtractive **manufacturing of complex parts.**

Benefits:

- Fast, big part additive manufacturing
- High degree of design freedom
- Milled surface for better quality and tolerances
- Superior properties (vs. cast material)

A close-up photograph of a vibrant green leaf. On the surface of the leaf, there is a cluster of small, white, translucent granules, likely representing biopolymer particles. The background is a soft, out-of-focus green.

Biopolymers

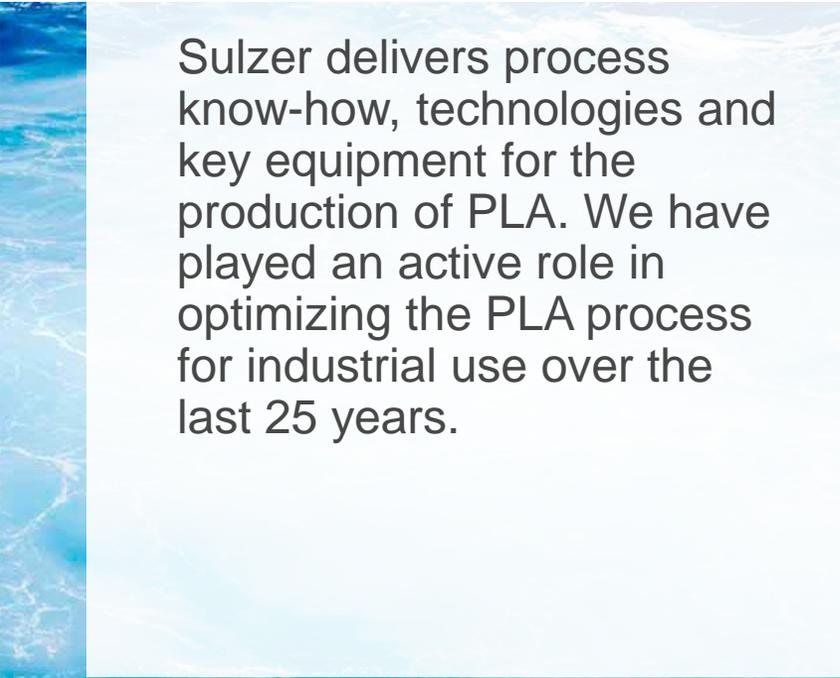
Leading technology for bio based plastics

Fostering a circular economy

A photograph of a vast blue ocean with white-capped waves, representing the environment where plastic waste often ends up.

Every year, millions of tons of plastic waste end up in the environment.

Polylactic acid (PLA) is a sustainable alternative to oil-based plastic: It can be used to produce plastics that are **biodegradable and 100% recyclable** to their original form.

A photograph of a vast blue ocean with white-capped waves, representing the environment where plastic waste often ends up.

Sulzer delivers process know-how, technologies and key equipment for the production of PLA. We have played an active role in optimizing the PLA process for industrial use over the last 25 years.

A photograph of a large industrial process plant, likely a recycling facility, with multiple levels of metal scaffolding and piping. The plant is illuminated by lights, and the sky is a clear blue.

Process plants

Recycling plastic waste into fuel

Sulzer supports Quantafuel's sustainable downstream plant

A large pile of plastic waste, including many clear plastic bottles and other containers, some with colorful caps. The waste is piled high and appears to be in a recycling facility.

Common plastics take a very long time to degrade or do not degrade at all.

Sulzer's **cutting-edge separation technologies** and manufacturing capabilities supported Quantafuel in its ambitious project to turn plastic waste into fuel.

A close-up view of a large pile of plastic waste, showing many clear plastic bottles and other containers, some with colorful caps. The waste is piled high and appears to be in a recycling facility.

Its facility can **recycle** 60 metric tons of previously unrecyclable plastics per day, generating 48 metric tons of hydrocarbon feed.

Waste to energy

Steelmanol – waste to energy

Turning steel industry's carbon emissions into biofuels



While the steel industry is one of the biggest sources of carbon emissions, the world's leading integrated steel and mining company **ArcelorMittal** is actively engaged in the **Steelmanol** project to turn its sites into smart carbon plants.

For this project, Sulzer designed a **first-of-its-kind solution** that simplifies the process and the equipment necessary, whilst creating closed loops that **can re-use key resources** and **dramatically reduce energy usage**.



Enabling the textile circular economy

Worn Again

Sulzer is investor and strategic technology partner in Worn Again



Fast retail has led to shorter life cycle for garments, with millions of tons of fabrics going to landfill and incineration. Today, **less than 1% is recycled** to new textiles.

Textiles are rather complex systems containing various types of fibers, dyes, fillers and additives, making them difficult to recycle.



Sulzer and H&M together control the UK-based company **Worn Again**. The teams are working on a unique textile recycling process to **convert textiles** at their end of use **back into virgin-like raw materials**.



Beauty

Beauty goes green

Sustainable mascara fibers for the beauty industry



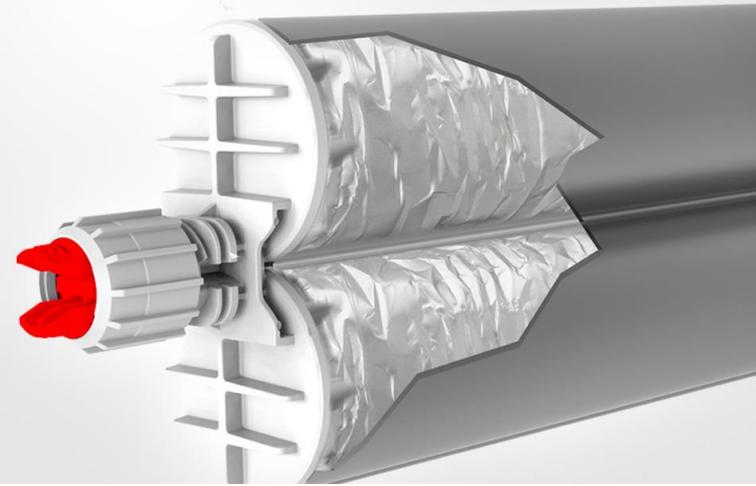
Beauty customers require sustainable solutions without compromising quality, functionality or aesthetics.

Sulzer's greenLINE fiber is a bio-based fiber made of 100% renewable raw material. It is ideal for mascara and eyebrow brushes and enables excellent lash definition and lengthening.

Adhesives

ecopaCC™ wins Packaging Europe Sustainability Award 2019

Collapsible primary packaging for adhesives and sealants



Sulzer has won the world's **most prestigious packaging innovation competition** in the "Resource efficiency" category with ecopaCC™, a collapsible primary packaging for adhesives and sealants.

The revolutionary design slashes costs, resources and waste, with significant savings potential across the value chain from transportation to disposal.

The collapsible cartridge reduces waste by 80%.



In a world constantly in motion, our lives depend on reliable fluid handling and separation. Sulzer harnesses the power of flow control and fluid application to make life safer, smarter and more sustainable.

Sulzer. Because life is fluid.