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20th October 2020

Powering Operations with Equipment Innovations

Markku Simula, President, Aggregates Business Area

Metso:Outotec

Metso Outotec in brief

Metso Outotec is a frontrunner in sustainable technologies, end-to-end solutions and services for the aggregates, minerals processing, metals refining and recycling industries globally.

By improving our customers' energy and water efficiency, increasing their productivity and reducing environmental risks with our process and product expertise, **we are the partner for positive change.**

4.2
billion euro sales*

50+
countries with presence

15,000+
employees, 80+ nationalities

150 years of expertise in mining and metal

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* Illustrative combined in 2019.

Metso Outotec key financials – illustrative 2019 combined

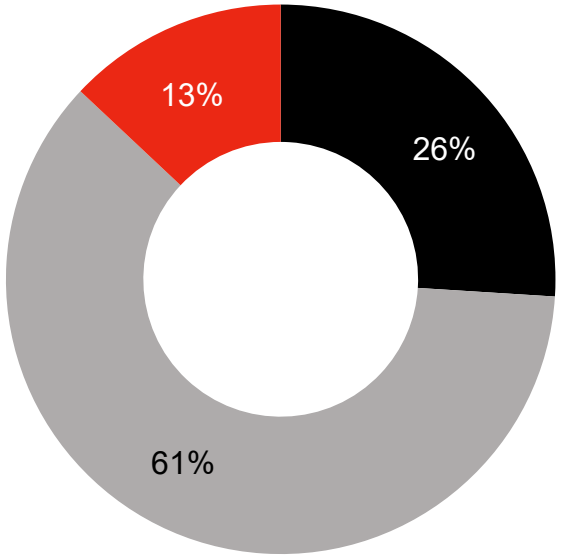
Sales
EUR million
4,186

Services
Share of sales
56%

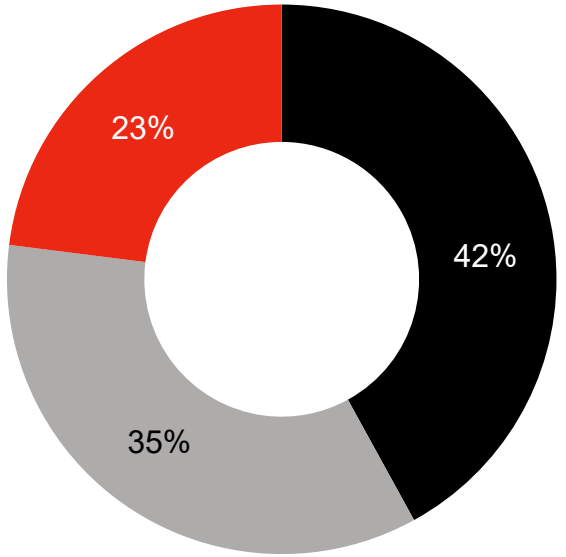
Adjusted EBITA[2]
EUR million / %
525 / 12.5%

1. Illustrative combined figures of Metso Minerals business carve-out and Outotec continuing operations' sales for 2019
2. Combined Metso Minerals business carve-out adjusted EBITA and Outotec continuing operations' adjusted EBITA for 2019

Sales by industry[1]



Sales by geography[1]



Metso Outotec is the global leader in aggregate crushing and screening solutions

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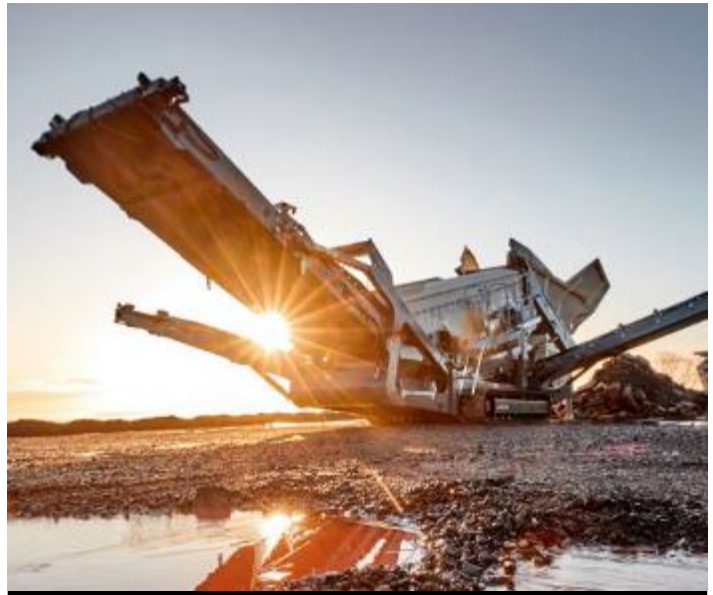

Customers

Large international companies as well as numerous smaller and local ones in aggregates industry

Offering

- Crushers, screens and feeders
- Mobile and portable machines and plants
- Stationary crushing and screening plant systems
- Spares, upgrades, and wear parts
- Professional services: Installation, inspections, plant audit, maintenance, shutdowns, optimization
- Life cycle services and performance solutions

Customer benefits

- Best cost, best availability, easy-to-buy, and easy-to-own solutions
- Range of brands and solutions that cover needs from essential to high-performance: Metso, McCloskey, Lippmann, Jonsson, Shaorui
- Environmentally friendly and low-noise, low-dust solutions for urban environments
- Timely and reliable expert service and parts near customers through our own and distributors' networks

Metso Outotec industry-leading service expertise and global network

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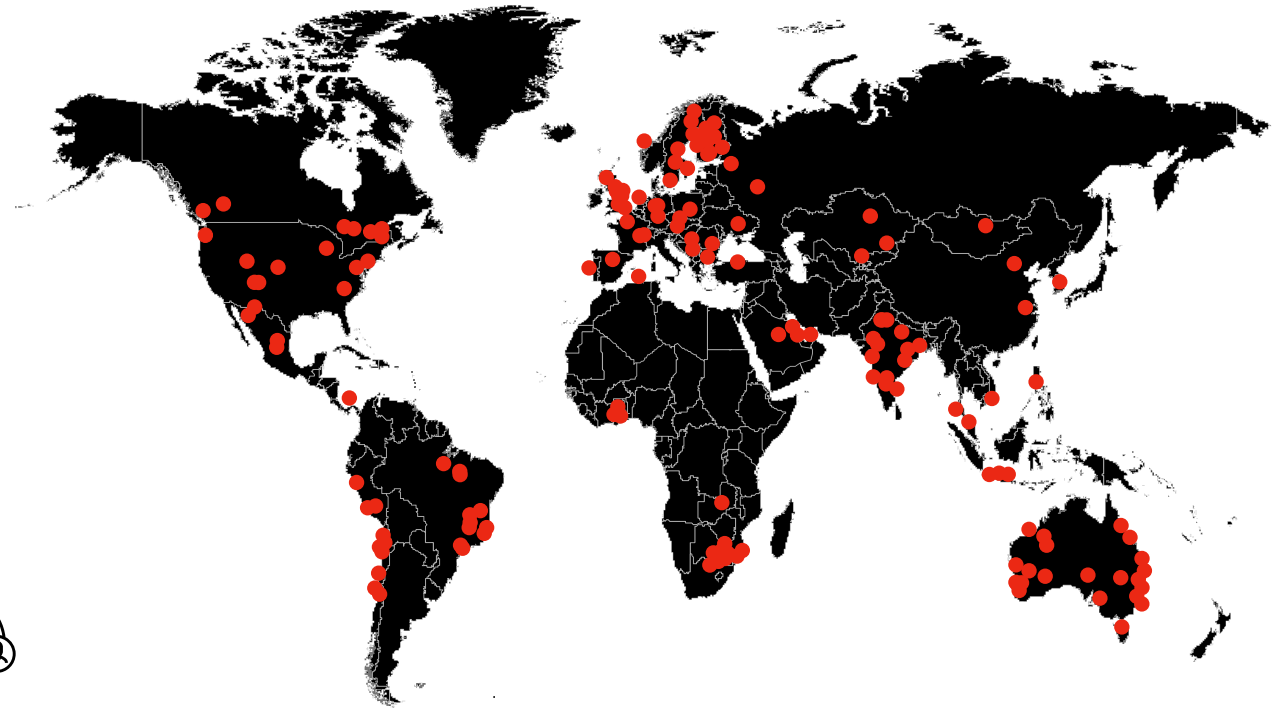
- Comprehensive service portfolio from spares and wears to advanced lifecycle services
- World-class team of experts
- Efficient service processes to enable our experts to get it right – fast
- Deep understanding of customer process, product design and technology



~5,000
Service experts

~140
Service locations

3
Performance Centers

200+
Distributors

Global megatrends

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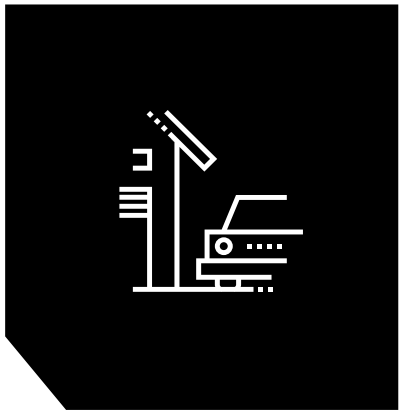


Urbanization

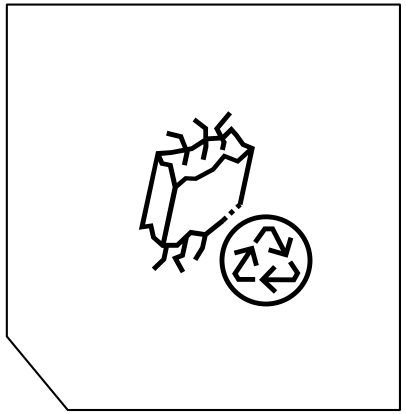
Brings requirements for more aggregates, minerals and metals to build modern societies.

Scarcity of natural resources

Sets the imperative for responsible processing of precious natural resources.

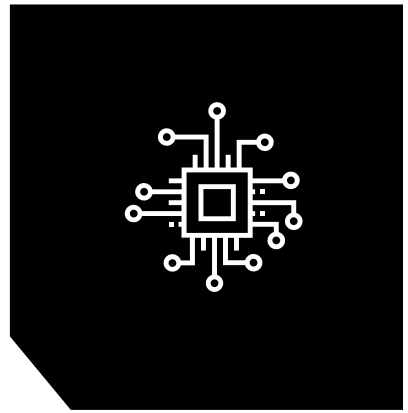
Climate change

Calls for energy and water efficiency and the decrease of emissions from our industries.



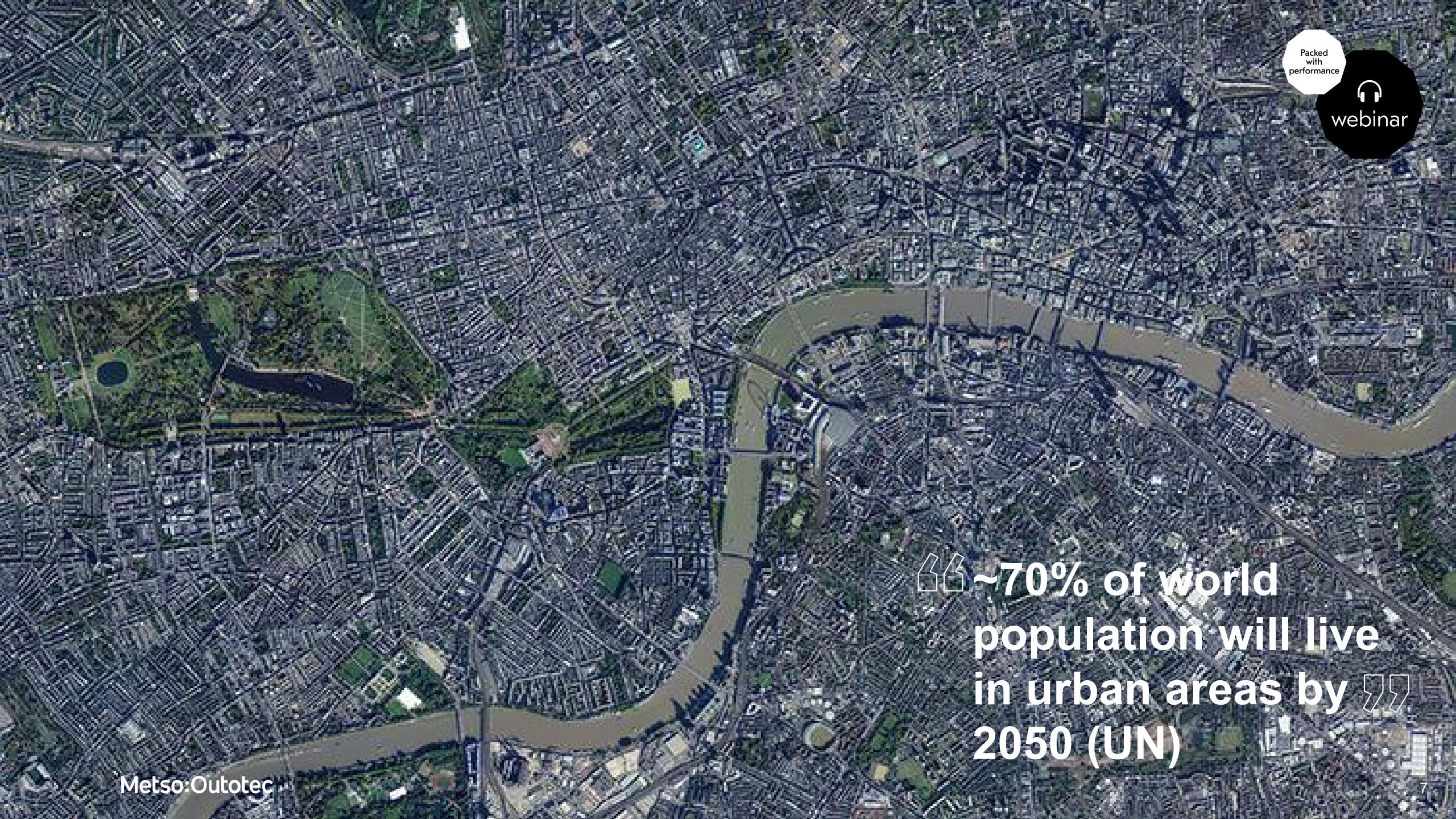
Circular economy

Drives recycling of aggregates, minerals, metals and waste.



Digitalization

Advances new business models and improves efficiency and safety.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“~70% of world population will live in urban areas by 2050 (UN)”
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90% of the increase in Asia and Africa

+416 million
urban people in India

+255 million
urban people in China

+189 million
urban people in Nigeria

Today's urbanization levels:
82% Northern America
81% Latin America and the Caribbean
74% Europe
68% Oceania
50% Asia
43% Africa

Especially mobile equipment is impacted by urbanization

Traditional aggregate production

Demolition and recycling

On-site crushing

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There are more needs for mobile equipment

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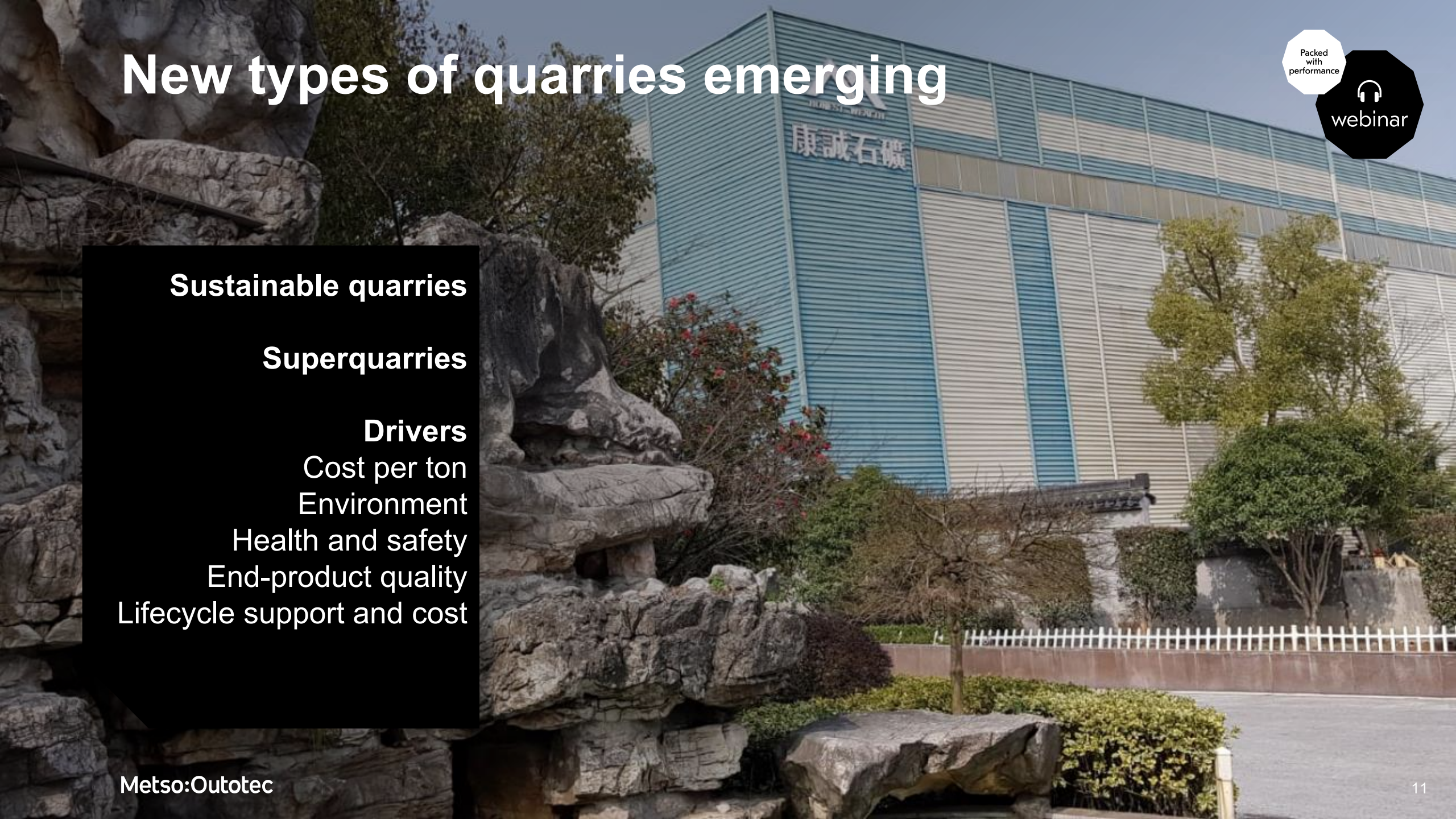
Equipment size, features and options

Customer applications, needs and business models

New types of quarries emerging



Sustainable quarries

Superquarries

Drivers
Cost per ton
Environment
Health and safety
End-product quality
Lifecycle support and cost

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Upgrading existing plants

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Replacements

Extensions

Re-locations

Drivers

Obsolete machines
Capacity needs
Environmental improvements
Changes in feed material or end-product
Automation
Reduce power consumption

Requirement

Minimal disturbance to existing operations

Special cases - Reconstruction

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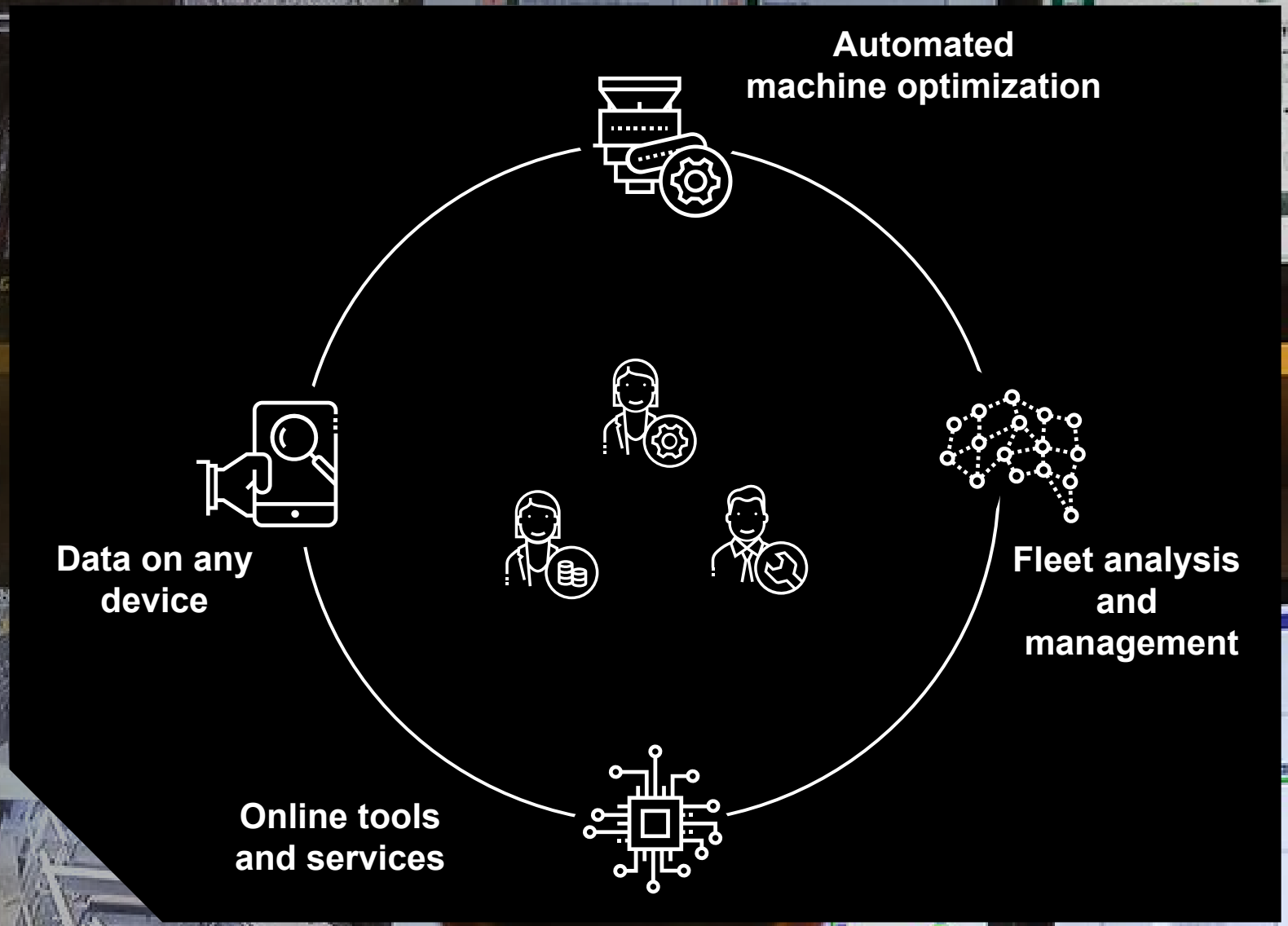
Digitalization in aggregates



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Online tools and services

Making buying easier

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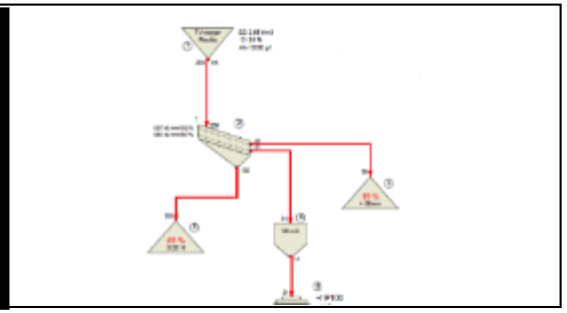
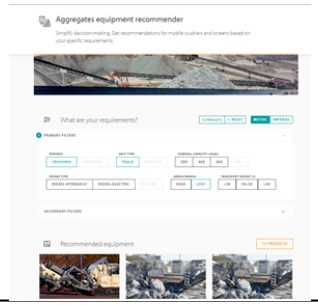
Bruno simulation tool
for process design



My PlantPlanner
for plant configuration

Equipment recommendation tool
for choosing mobile equipment



my.metso.com
for ordering equipment and parts

Virtual demonstrations
utilizing virtual and augmented reality

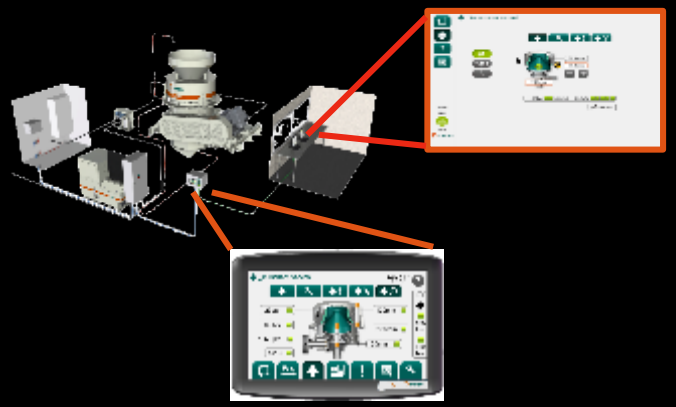
Virtual training
for employees and customers

Automated machine optimization

Assisted user experience

Increased performance, safety and cost-efficiency

Self-aware equipment



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Making operating easier

Fleet analysis and management

Updated fleet data and location

Actions with less delay

Avoiding unexpected breakdowns

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Making owning easier

Sustainability drivers

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CO_2

Energy efficiency

Dust and noise

Health & Safety

Developing fuel economy remains important

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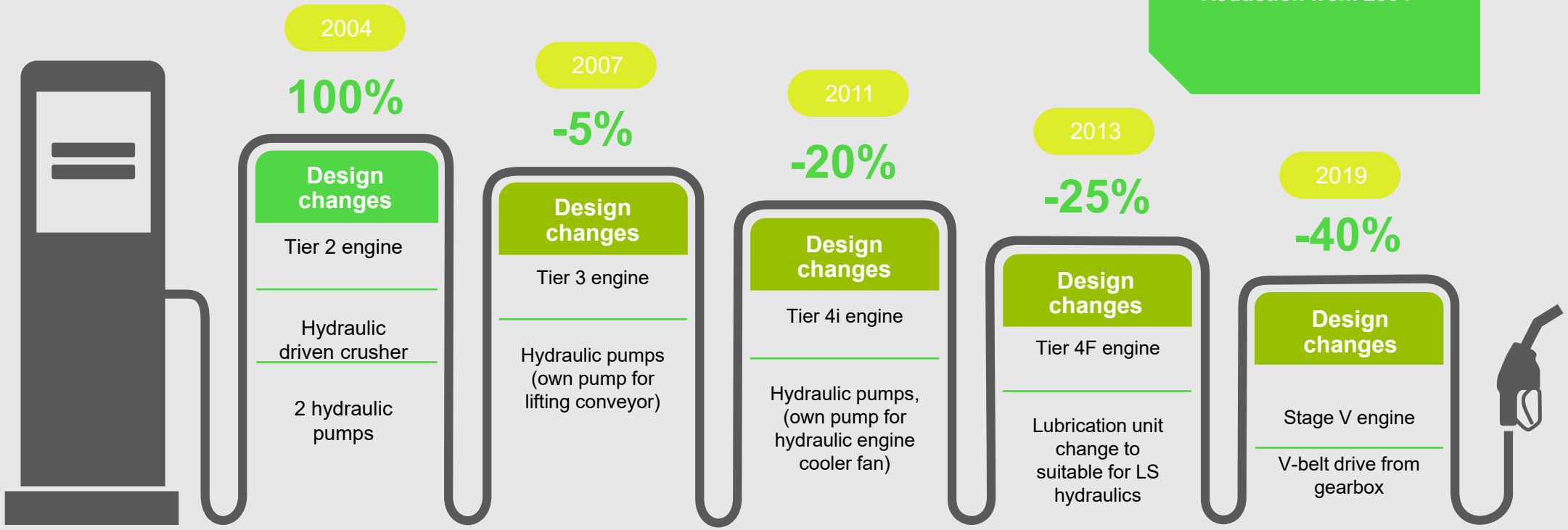
Fuel economy improvements 2004-2019 in Lokotrack LT200HP

~40%
Reduction from 2004



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Metso's test results from models: 2006 and 2019 at Ventoniemen Sora, Finland

Cutting noise emissions

Noise protection distance cut by half in typical hard rock application

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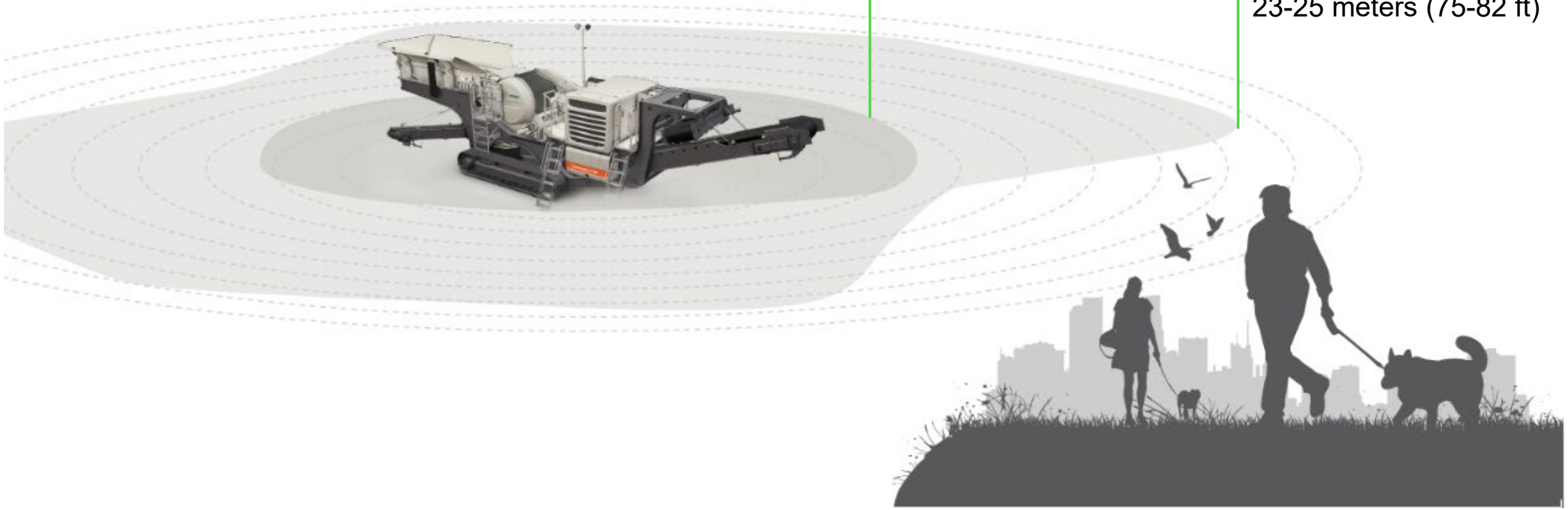
Noise protection distances 85 dB(A)

Lokotrack Urban
9-11 meters (30-36 ft)

Conventional crusher
23-25 meters (75-82 ft)



Uncompromised safety

Safe products and services

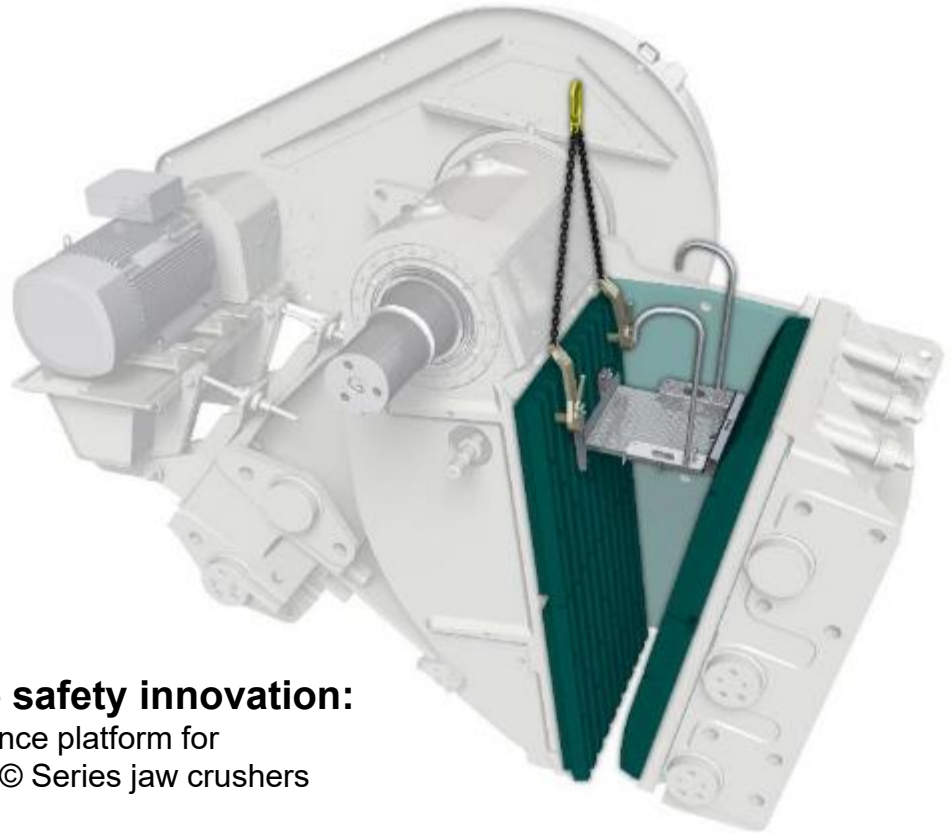
- Products designed for safety
- Safe and professional service teams

Safe and responsible supply chain

- Rigorous supplier screening
- Supplier code of conduct

Health and safety of people

- Safe and secure workplace
- Proactive attitude towards zero harm



Unique safety innovation:
Maintenance platform for
Nordberg© Series jaw crushers

Summary

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- Metso Outotec is the global leader in aggregates crushing and screening solutions including equipment, parts and support
- Global megatrends have a strong influence on how aggregates industry is developing
- We are committed to meet our customers needs in the changing world with continuous innovation
- Together with our customers and partners we form the strongest aggregate network in the industry

Partner for positive change

www.metso.com/aggregateswebinars

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