



New CAP Group headquarters in Milan, built with ECOPact

ACCELERATION OF GREEN PRODUCTS

CAPITAL MARKETS DAY 2021

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SIX MEGATRENDS DRIVING CONSTRUCTION

OUR MARKETS HAVE NEVER BEEN AS ATTRACTIVE

POPULATION GROWTH

from ~8 billion today to ~10 billion by 2050



URBANIZATION AND MEGACITIES

Approx. 2.5 billion more people are expected to live in cities by 2050



Higher demand for **SUSTAINABLE CONSTRUCTION SOLUTIONS** due to resource scarcity & climate change



Increased demand for **BETTER LIVING STANDARDS** and more efficient infrastructure



INNOVATION DRIVING BUILDING TECHNOLOGIES AND BUILDING EFFICIENCY accelerated by light and modular construction solutions



More **REPAIR & REFURBISHMENT** driving urban demand



SHAPING NORMS AND STANDARDS

ACCELERATING GREEN DEMAND



Driving **green demand** across the **value chain**,
anticipating our **customers needs**

AT THE FOREFRONT OF GREEN BUILDING SOLUTIONS

INNOVATING TO ACCELERATE GREEN GROWTH

Low Carbon



ECOPACT
The Green concrete



ECOPLANET
The Green cement



MAESTRO
Low carbon cement designed for high-quality masonry jobs



TERRAFLOW
Green cement for efficient backfilling

Circular Economy



SUSTENO
Cement with processed mixed rubble from demolition projects



AGGNEO
Recycled aggregates for circular building



GEOCYCLE PLANET
Socially-driven waste collection for plastic neutrality



ROOFING RECYCLING
Membranes & ISO boards used as Alternative Fuels

Build More with Less



DYNAMAX
The Ultimate Performance Concrete



DUCTAL
Ultra light weight & High Performance Concrete



3D PRINTING
Building more & faster with less



BASE VIAL
Cement for improved and stabilized soils

Buildings Efficiency



FIRESTONE
Building Products Roofing membranes and ISO boards for cool, green, solar roofs



AIRIUM
Insulating foam for energy efficiency



THERMEDIA
Concrete solution reducing heat loss



HYDROMEDIA
Permeable concrete

AT THE FOREFRONT OF GREEN BUILDING SOLUTIONS WITH ECOPACT

INDUSTRY'S LARGEST RANGE OF GREEN CONCRETE TO ADDRESS GREEN DEMAND

ECOPact

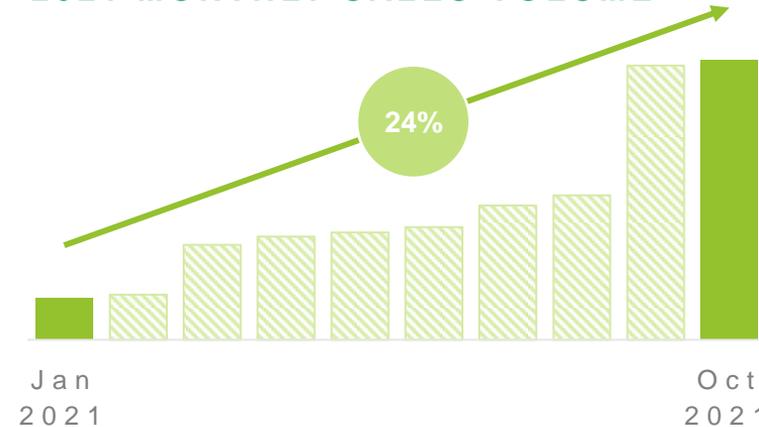


Launched in 24 Markets



- **Low carbon concrete** with **CO₂ reduction of 30% to 100%**
- **First** ever low carbon **branded concrete**
- High **performance, sustainable & circular** designed for all applications
- Low carbon properties include:
 - Upcycled **construction** and **demolition waste**
 - Low **CO₂ binders**
 - Supplementary **cementitious materials**
 - Innovative **mix design & optimization** technology

2021 MONTHLY SALES VOLUME



Target 2025

>25%

Ready Mix Net Sales

ECOPACT IN ACTION

GLOBAL MARKET PENETRATION

Delivering High Performance Low Carbon Concrete WASHINGTON, USA



CO₂ reduction of **46%**

- Residence hall, Georgetown University
- Achieved LEED Platinum certification
- Volumes supplied: 6'000 m³

Reducing the Footprint, Green Energy Infrastructure ARGENTINA



CO₂ reduction of **46%**

- Aña Cuá hydro-electric dam, key infrastructure project
- Volumes supplied: 250'000 m³

Helping developers deliver on their Net Zero Agenda WATFORD, UK



CO₂ reduction of **64%**

- The Eight Gardens project
- Volumes supplied: 4'000 m³

Winner of Best Green Building Material AUSTRALIA & NZ



- Sustainability Awards Australia
- Winner in the category green building materials



AT THE FOREFRONT OF GREEN BUILDING SOLUTIONS WITH ECOPLANET

LARGE RANGE OF APPLICATIONS FROM HOME BUILDING TO INFRASTRUCTURE

ECOPlanet

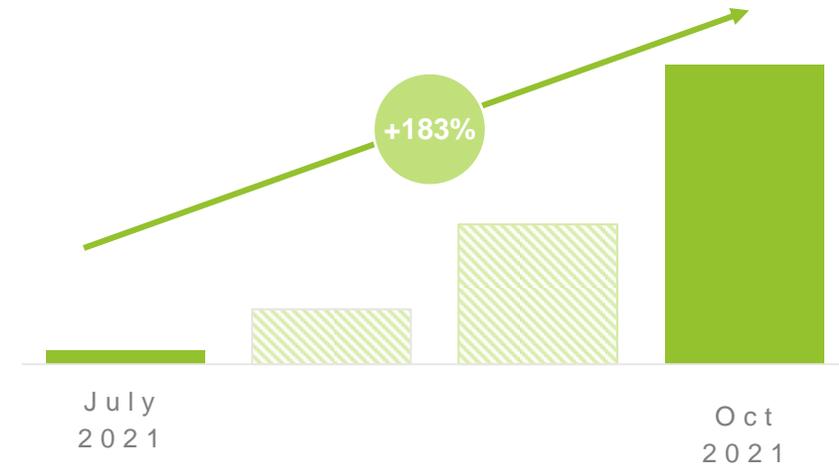


- **Low carbon cement with CO₂ reduction of 30% to 100%**
- **First global range** of green cement available at scale
- High **performance, sustainable & circular** for a broader range of applications from home building to complex infrastructure project
- CO₂ reduction through use of innovative **low-emission** and **recycled raw materials, process efficiency** and **alternative fuels**
- Includes the world's first cement with **20% recycled construction** and **demolition waste** **“SUSTENO”**

Launched in 12 Markets



2021 MONTHLY SALES VOLUME



ECOPLANET IN ACTION

GLOBAL SCALE UP IN PROGRESS

Amazon builds sustainable headquarter with ECOPlanet SEATTLE, USA



CO₂ reduction of **80%**

- Prestige headquarters building
- Office building project for Amazon's new headquarter facility



Renewable Energy Project built Sustainably SEVILLE, SPAIN



CO₂ reduction of **80%**

- Construction of 7 wind turbines for Loma de Los Pinos Eolic Park in south of Spain



Enabling compliance with new RE2020 Energy & CO₂ Regulation FRANCE



CO₂ reduction of **35%**

- Large multi-unit housing development using ECOPlanet with calcined clays
- New French RE2020 compliant

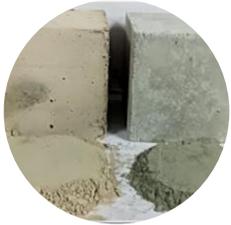


FULL INNOVATION PIPELINE

ACCELERATE GREEN BUILDING

Low Carbon

- New alternatives to traditional Cement additives
- New low CO₂ Concrete technologies



CALCINED CLAYS



NEW SOURCES OF MIC¹
Harvested Fly Ash



LOW CLINKER CEMENTS



MINERAL FILLER USE IN CONCRETE
GCC, Limestone

Circular Economy

- Enabling increased adoption of recycled materials use



CDW AS MIC¹
In cement



CDW² USED AS ARM³
replacing Limestone in Clinker Manufacturing



CDW² IN CONCRETE
Extending use of Recycled materials



Aggneo
New applications & feedstocks for recycled Aggregates

Build More with Less

- New offers to enable leaner design
- New systems and solutions to optimize material use



DYNAMax
The Ultimate Performance Concrete



INNOVATIVE PRE-CAST
Structural elements & carbon-fibre reinforcement



3D PRINTING
Building more & faster with less



ORIS

CALCINED CLAY GREEN MINERAL COMPONENT ACCELERATING GREEN CEMENT

Opportunity

Lower temperature of calcination;
Abundant worldwide



4 times less CO₂ intensive than clinker;
huge scaling opportunities

Holcim Advantage

Proprietary Holcim technologies
allow carbon neutral calcined clay
production

Kg CO₂/t
Net emissions



Pioneering low-CO₂ binders

Next Step

Industrial-scale installation in
development in France commissioned
in 2022, **5+** projects in the pipeline



Mass-market commercialization;
CEM IV - up to 48% lower CO₂ intensity

DRIVING THE CIRCULAR ECONOMY

SCALING UP CONSTRUCTION AND DEMOLITION WASTE AHEAD OF EU NORMS

Applications of Construction and Demolition Waste in Switzerland

Current **European norms & standards do not allow** large use of CDW¹

Swiss norms are supporting demand for ECOPlanet / Susteno

EU

European norms & standards are evolving



Construction and Demolition Waste Recycling, Switzerland

ECOPlanet
The Green Cement

SUSTENO

As part of the ECOPlanet range, Susteno is the **world's first** cement with **20% CDW¹ inside**

By 2023, use of construction and demolition waste as mineral component in cement will be accepted

READY TO GRASP OPPORTUNITY TO WIDELY COMMERCIALIZE CIRCULAR CEMENTS AT SCALE



HOLCIM