

SULZER – Pumps Equipment

April 2015



Content

Introduction to Pumps Equipment

Key Figures

Our Focused Industries

Our Business Areas

Our Manufacturing Facilities

Customer Service Center (CSS)

Sulzer Today

SULZER

Pumps Equipment

Pumps technology and solutions



Main markets served:

- Oil and gas
- Power
- Water

Rotating Equipment Services

Repair and maintenance services for rotating equipment



Main markets served:

- Oil and gas
- Power
- General industry

Chemtech

Separation, mixing and service solutions



Main markets served:

- Oil and gas
- Power
- General industry

Customer and people oriented, making sure that we act excellently

Pumps Equipment

Main markets

- Oil and gas (upstream, midstream and downstream)
- Water (production and transport, wastewater)
- Power

Main products

- Engineered pumps
- Configured pumps
- Associated services



Market Leader in Pump Technology and Solutions

SULZER

Products and services

- Pumping solutions, related equipment, and services

Market leadership

- Oil and gas (upstream, midstream, and downstream)
- Water (e.g. production and transport, wastewater, dewatering, pulp & paper, chemical process industry)
- Power (fossil, nuclear, renewables)

Customer benefits

- Extensive research and development in fluid dynamics, process-oriented products, and reliable services
- Global manufacturing and service network ensures high customer proximity
- High efficiency of units aids in reducing carbon presence and energy consumption
- Best production and test facilities in the world



Vision and Values

Vision:

Our customers recognize us for our leading technology and services, delivering innovative and sustainable solutions.

Values:



She sees innovation as a mindset.

We exceed the expectations of our customers with innovative and competitive solutions



He's looking for long-term success.

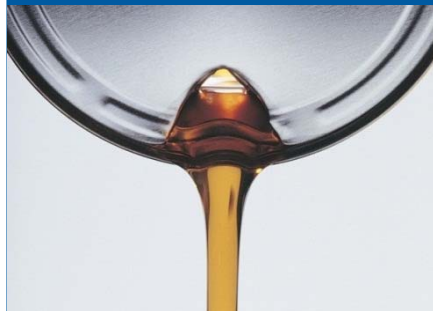
We perform on the basis of structured work processes and LEAN principles



She likes working with dedicated people.

We are committed to high standards and show respect for people

Focused Industries




Oil and gas



Power



Water



General industry

Business Areas

EMEA

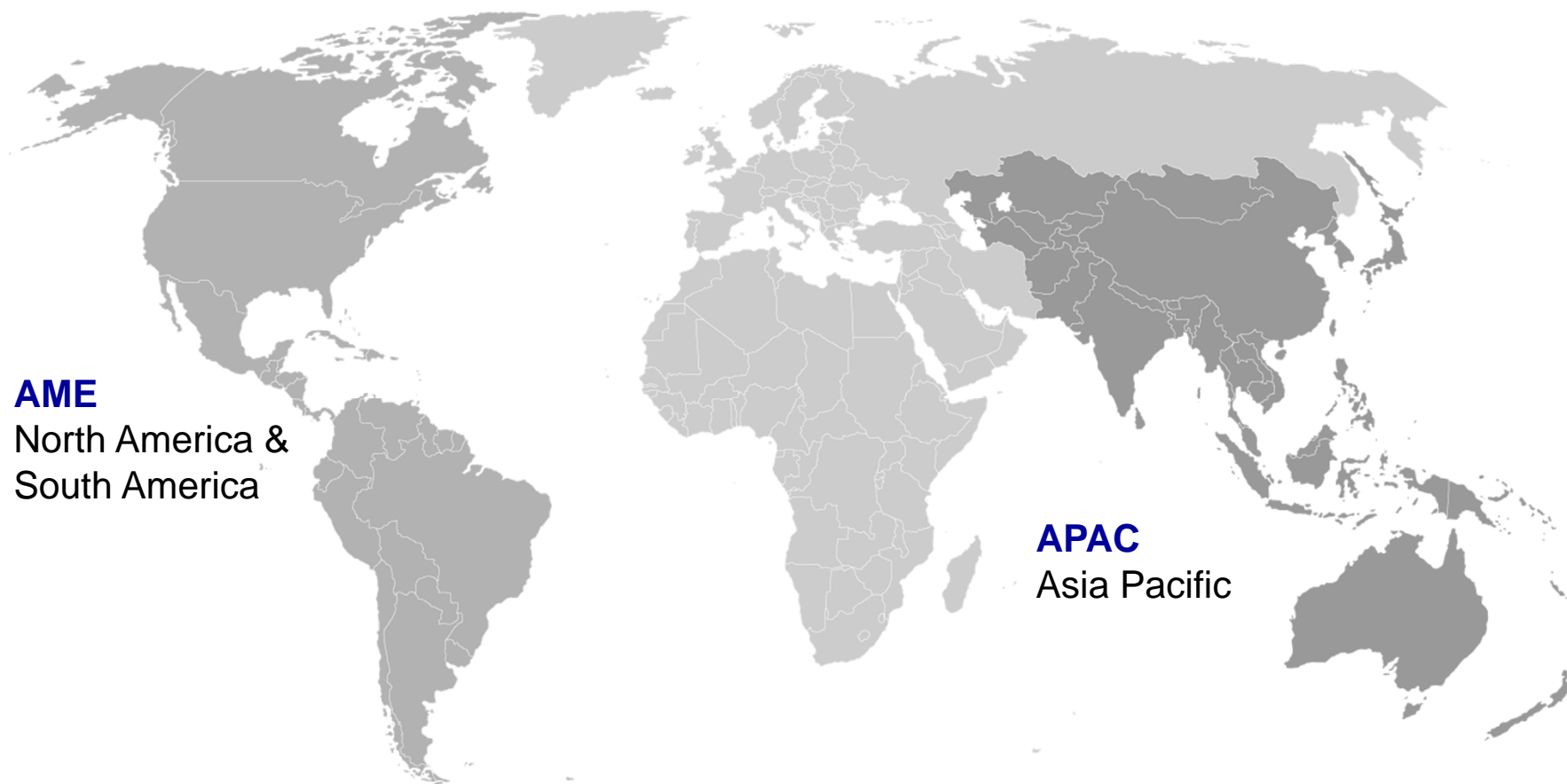
Europe, Middle-East & Africa

AME

North America &
South America

APAC

Asia Pacific



Top Quality Processes

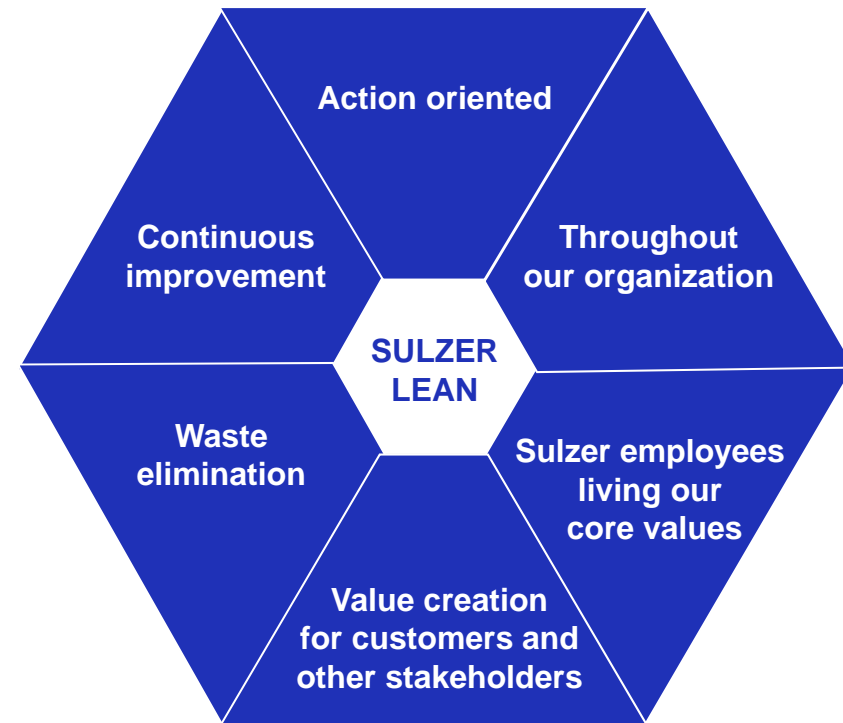
Continuously striving to improve processes

- “Do it right the first time”
- Customer satisfaction
- Employee satisfaction
- Quality awareness and leadership
- Continuous improvement programs
- Performance measurements
- Preventive and corrective actions
- ISO 9001/9002 certification



Sulzer LEAN Vision

- LEAN is an **action orientated** management philosophy
- Adopted **throughout** our organization
- Based on **Sulzer employees living our core values**
- With the objective of **creating value** for customers and other stakeholders
- **Eliminates all wastes**
- Is anchored in an organizational **desire and ability for continuous improvement**



For a Greener Tomorrow

- Noteworthy results achieved by Sulzer in issues such as quality development and environment efforts
- Manufacturing facilities in Finland were the first within the pump industry to be certified according to ISO 14001
- While others are only followers, Sulzer shows that the concern for the environment is part of our business philosophy and daily operation



Selected Alliance Partners – End users and Contractors

- To create high lifecycle value to customers and sub-suppliers, Sulzer maintains close relationships with key players in the selected markets
- Sulzer puts its engineering, process and application and know-how to work on developing, in close cooperation with the client, pumping solutions which improve profitability and competitiveness



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Key Figures and Review 2013

Adj.¹⁾ orders –1%
Adj.¹⁾ sales flat

ROSR²⁾: 8.7%

<i>In millions of CHF</i>	2013	2012
Order intake	2 031.3	2 094.3
Order backlog (Dec. 31)	1 235.0	1 309.1
Sales	2 051.3	2 097.5
EBIT before restructuring – EBITR ²⁾	178.6	199.3
<i>ROS before restructuring % - ROSR²⁾</i>	8.7%	9.5%
Restructuring expenses (<i>– charge/+ debit</i>)	–9.5	–8.1
EBIT	169.1	191.2
<i>ROS % (EBIT/sales)</i>	8.2%	9.1%
<i>ROCE % (EBIT/capital employed³⁾)</i>	12.1%	13.1%
Employees (Dec. 31)	8 496	8 573

Review 2013:

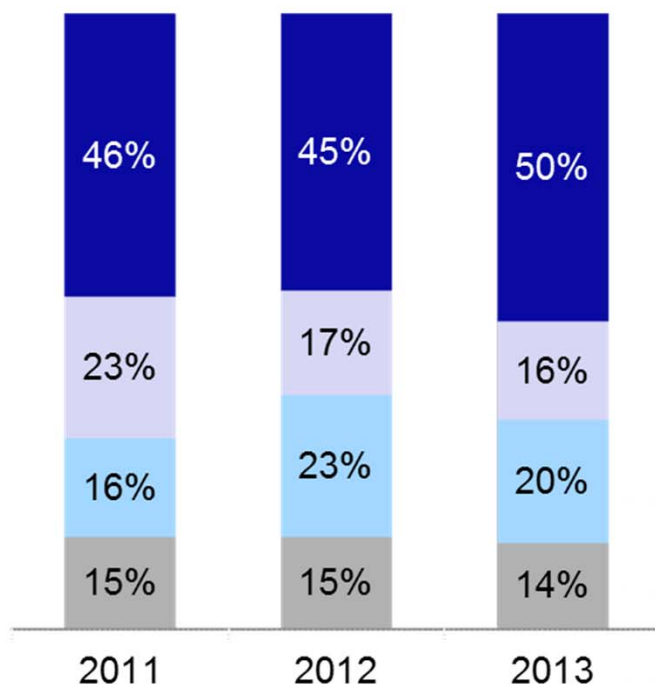
- Orders and sales slightly behind prior year
- Operating income mainly affected by capacity underutilization in water business; factory footprint adjusted
- H2 performance improved due to measures taken and some market recovery in parts of the water market



- 1) Adjusted for currency effects as well as acquisitions and divestitures
- 2) Adjusted for restructuring expenses
- 3) Capital employed: average operating assets including intangibles

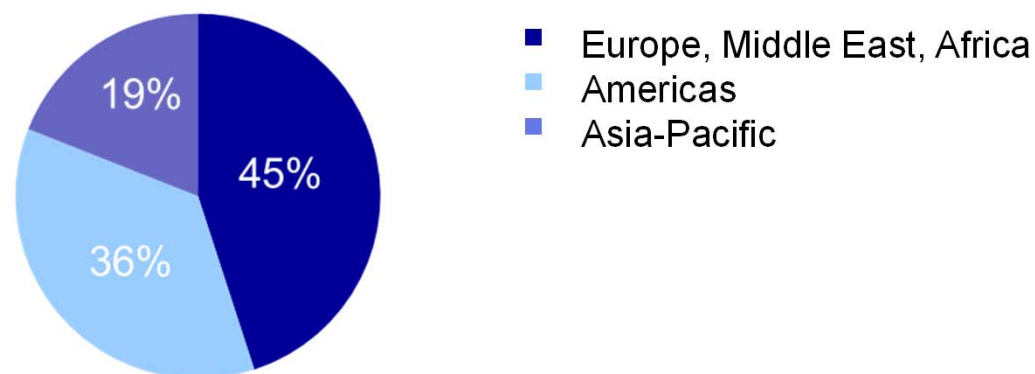
Breakdown by Market and Geography

Sales by market segment

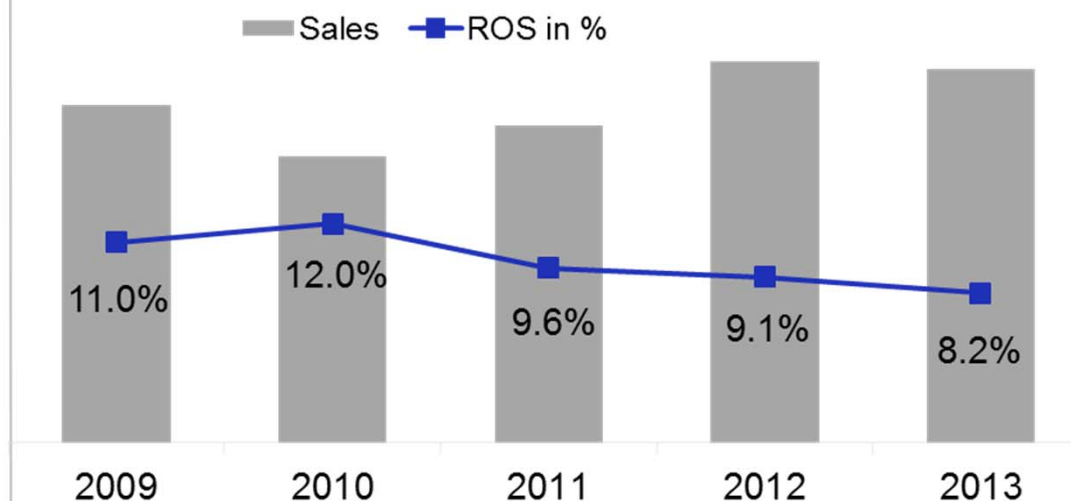


- Oil and gas
- Power
- Water
- General industry

Sales by region



Sales and ROS development (in millions of CHF)



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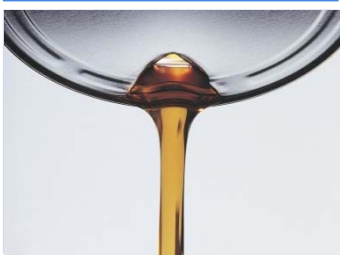



Our Focused Industries

Our Business Areas

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Customer Service Center (CSS)

Focused Industries

	Industries	Sub-industries
	Oil and gas	Carbon capture and storage, exploration and drilling, oil and gas production, pipelines, FPSO, Liquefied Natural Gas (LNG), subsea, oil sand, petrochemical, gas processing, refining, synfuels, chemicals, plastics and bioplastics, biofuels
	Power	Coal, gas, nuclear power generation, hydro, geothermal, solar, wind power, biomass/waste power, carbon capture and storage
	Water	Dewatering, domestic and commercial wastewater, industrial water and wastewater, irrigation and flood control, municipal wastewater, water transport and production
	General industry	Paper and board, pulp, pumping and mixing solutions, adhesives, agriculture, air separation, construction, facility management, fertilizers, food and beverage, forming, heavy machinery, machining, marine, metals, mining, printing, racing, rail, semiconductors, textile, tooling

Oil and Gas (Upstream, Midstream)

Sulzer's main fields of activity

- Carbon capture and storage
- Exploration and drilling
- Oil and gas production
- Pipelines
- Floating production storage offloading (FSPO)
- Liquefied natural gas (LNG)
- Subsea oil production
- Oil sand

Sulzer's products and solutions

- Injection pumps
- Sea water lift pumps
- Pipeline pumps
- Fire fighting pumps
- Process pumps
- Auxiliary pumps



Product Portfolio

Oil and Gas Industry (Upstream and Midstream)



Product type	Product name	Water injection	Pipeline	Booster	Sea water lift	Fire fighting	Auxiliaries
Barrel pumps	HPcp/HPcpV	■	■				
	GSG	■	■				
	CP	■	■				
Axially split pumps	SMD/SMN/SMH		■	■	■	■	■
	HPDM		■	■			
	MSD	■	■				
	HSB		■	■	■		
Vertical pumps	JF					■	
	VCR	■	■	■	■	■	■
	JTS/SJD/SJT/SJM/SJP	■	■	■	■	■	■
Single stage pumps	OHV/OHVL		■	■	■		■
	AhIstar/CPT/OHH/OHHL		■	■	■		■
	CD/BBS/BBT/BBTD		■	■			■
Multistage pumps	MPP	■	■	■			

Oil and Gas (Downstream)

Sulzer's main fields of activity

- Petrochemical
- Gas processing
- Refining
- Synfuels
- Chemicals
- Plastics and bioplastics
- Biofuels

Sulzer's products and solutions

- Process pumps
- Auxiliary pumps



Product Portfolio

Oil and Gas Industry (Downstream)



Product type	Product name	Synfuels	Refining	Gas processing	Petrochemicals	Nitrogenous fertilizers
Single stage pumps	OHH/OHHL	■	■	■	■	■
	OHV/OHVL	■	■	■	■	■
	Ahlstar/CPT	■	■	■	■	■
	BBS/CD	■	■	■	■	■
Two-stage pumps	BBT/BBT-D	■	■	■	■	■
Barrel pumps	GSG/CP	■	■	■	■	■
Axially split pumps	MSD/MSD2/HSB	■	■	■	■	■
	SDM/SM/SMH	■	■	■	■	■
Vertical pumps	SJD (API)/SJD (CEP)	■	■	■	■	■
	SJT/SJM/SJP	■	■	■	■	■

Power Generation

Sulzer's main fields of activity

- Coal, gas, nuclear power generation
- Hydro, geothermal, solar, wind power
- Fuel cells (coatings)
- Biomass/waste power
- Carbon capture and storage

Sulzer's products and solutions

- Feed water pumps
- Circulation pumps
- Cooling water pumps
- Condensate extraction pumps
- Production pumps
- Injection pumps
- CO₂ capture pumps
- Auxiliary pumps



Product Portfolio

Conventional Power Generation Industry



Product Technology	Product name	Boiler feed	Condensate extraction	Cooling water	Nuclear services	CSP services	Geothermal services	Auxiliaries
Barrel pumps	HPT	■						
	GSG	■			■			
	CP	■			■			■
Axially split pumps	SMN/SMNV			■				■
	ZPP/Z22			■				■
	SB	■		■			■	■
	MSD	■			■			■
Ring section pumps	MBN/MC/MD/ME	■						
Vertical pumps	SJD (CEP)		■				■	
	SJT/SJM/SJP/VCR		■	■	■		■	■
	SJT VCN					■		
	SJT Geo						■	
Two stage pumps	BBT/BBT-D	■						■
Single stage pumps	HPTd				■			
	BBS	■				■		■
	HZB	■			■	■		■
	CD	■			■	■		■
	OHH/ZE/ZF	■			■	■	■	■
	AHLSTAR/CPT							■
	GVG				■			

Water

Sulzer's main fields of activity

- Dewatering
- Domestic and commercial wastewater
- Industrial water and wastewater
- Irrigation and flood control
- Municipal wastewater
- Water transport and production

Sulzer's products and solutions

- Water transport and supply
- Irrigation and flood control
- Drainage, sewage, dewatering
- Deep mine dewatering
- Desalination
- Domestic and commercial wastewater
- Wastewater treatment



Product Portfolio

Water Industry



Product type	Product name	Production & transportation			Water usage	Wastewater		
		Municipal water	Desalination	Irrigation & flood control	Industrial water and wastewater	Domestic & commercial water and wastewater	Municipal wastewater	Dewatering
Axially split pumps	SMD/SMN	■	■	■	■		■	
	SZM/ZPP/Z22	■	■	■	■		■	
	HPDM	■			■			
	MSD/MSD-RO	■	■		■			
Ring section pumps	MBN-RO/MBN		■		■			
	HPL/HPH				■			■
Single stage pumps	ZE/ZF		■		■			
	AHLSTAR		■		■			
	CPT		■		■			
Vertical pumps	SJT	■	■	■	■			
	SJM	■	■	■	■			
	SJP	■		■				
	JTS	■		■	■			
	STR	■	■	■	■			
	DEEP WELL SUBMERSIBLE	■		■	■			

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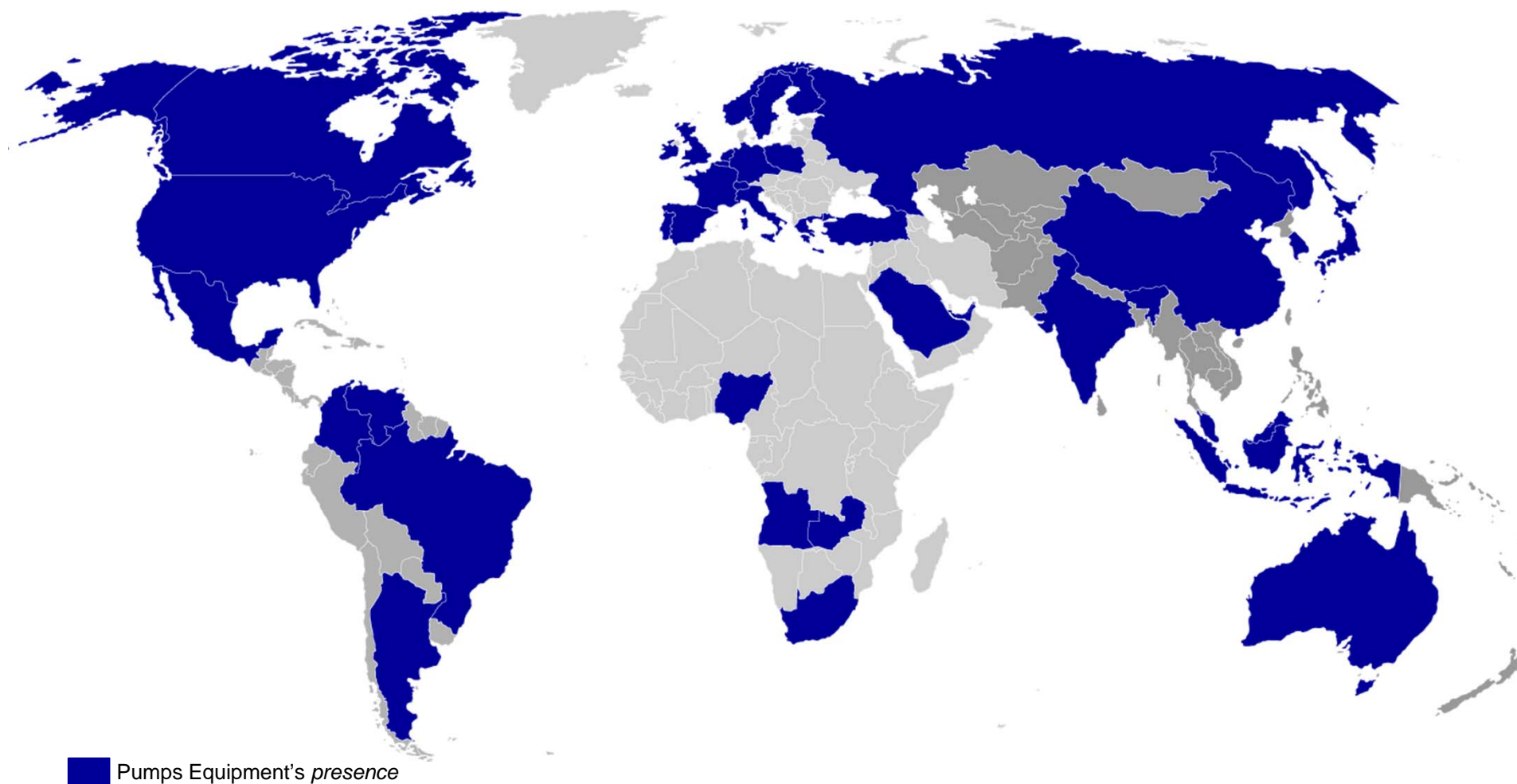
Our Focused Industries

Our Business Areas

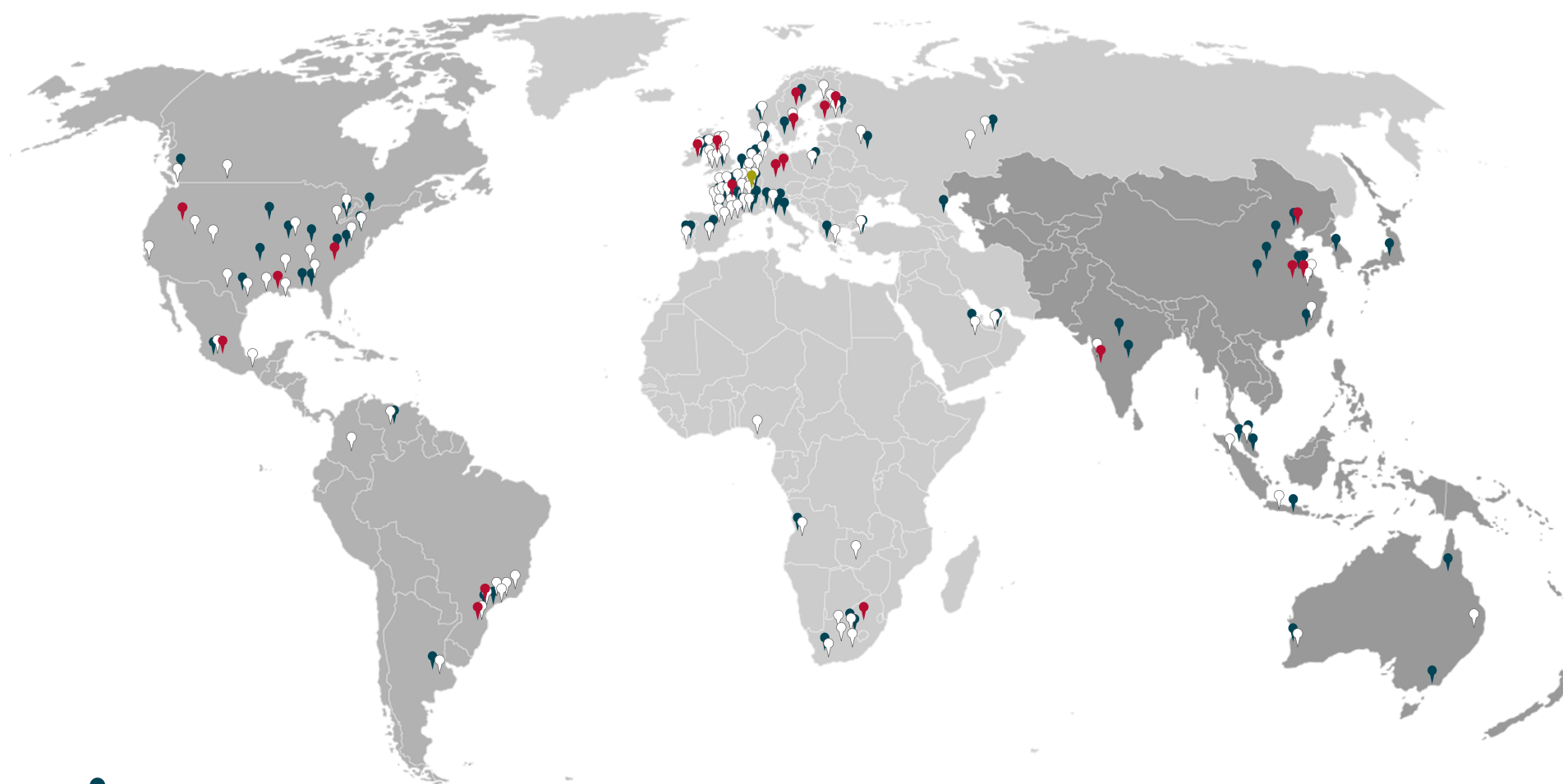
Our Manufacturing Facilities





Customer Service Center (CSS)

Pumps Equipment's Worldwide Presence



Network of Locations

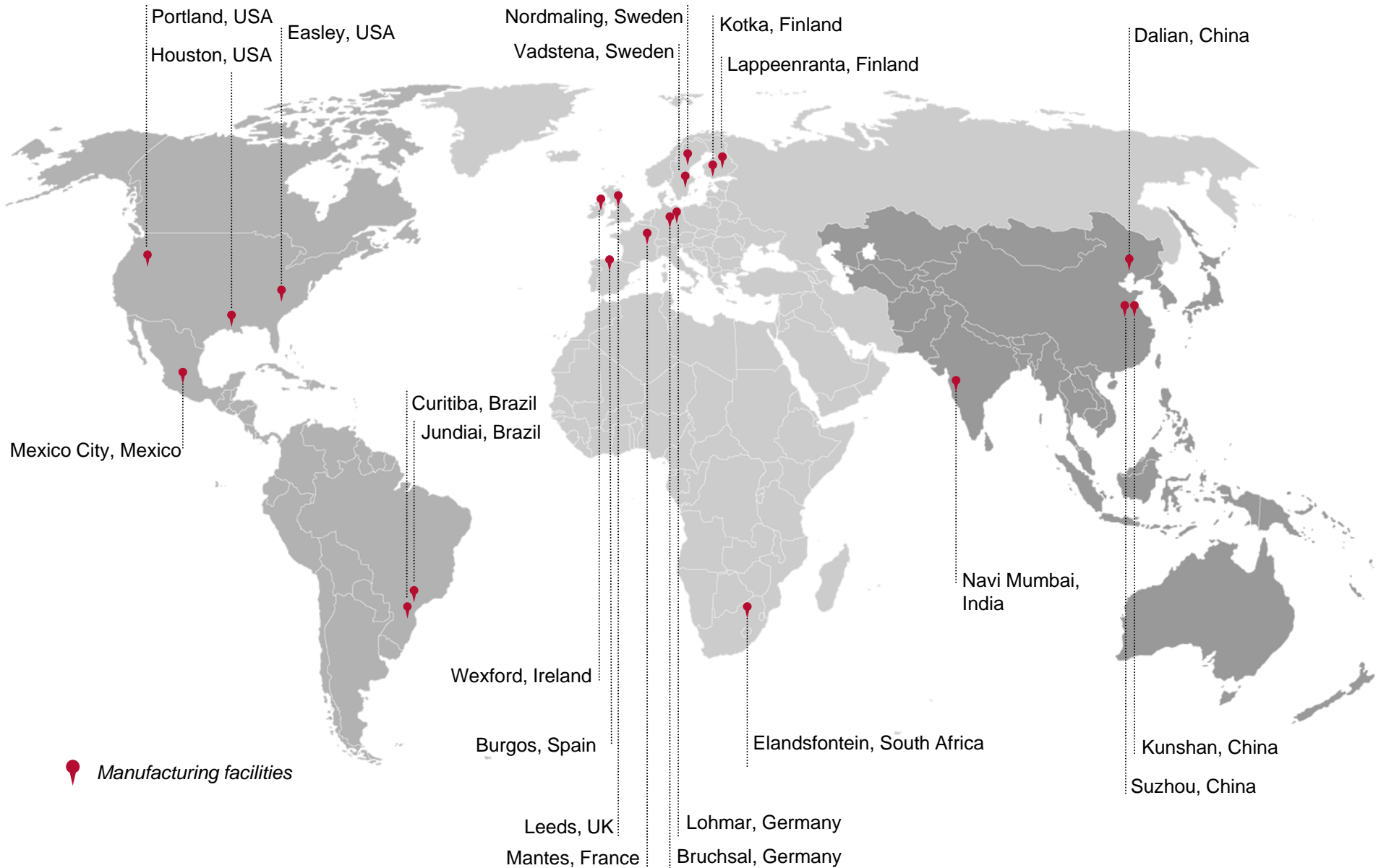


-  Sales offices
-  Customer support service center
-  Manufacturing facilities
-  Divisional headquarters

Network of Service Centers



Network of Manufacturing Facilities



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Manufacturing Facilities - EMEA

Europe

Leeds, United Kingdom	Engineered pumps for Oil & Gas, Hydrocarbon Processing and Power Generation industries
Wexford, Ireland	Products for Wastewater collection and processing
Mantes, France	Engineered pumps for Power Generation and Oil & Gas markets
Vadstena, Sweden	Process pumps, agitators and mixers for Pulp & Paper, Food, Biofuels Fertilizers and Wastewater markets
Nordmaling, Sweden	Pumps for the dewatering markets
Kotka, Finland	Process pumps, agitators and mixers for Pulp & Paper, Food, Biofuels, Metals and Fertilizers markets
Lappeenranta, Finland	Process pump for General Industry markets
Lohmar, Germany	Engineered pumps for Wastewater markets
Bruchsal, Germany	Engineered pumps for Hydrocarbon Processing, Power Generation and General Industry markets
Burgos, Spain	Engineered pump for Water markets

Africa

Elandsfontein, South Africa	Engineered and pre-engineered pumps for Power, Water & Wastewater and mining mostly to South Africa with increasing exports
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 *Manufacturing facilities*



Manufacturing Facilities - AME

North America

Portland, Oregon, USA

Engineered API pumps for HPI and Oil & Gas

Easley, South Carolina, USA

Industrial pumps for Pulp & Paper, Food, Biofuels, Metals and Fertilizers to USA and for exports

Houston, Texas, USA

Vertical pump requirements of the waste water, water treatment, industrial, marine, power, irrigation/agriculture and petrochemical markets

Mexico City, Mexico

Pumps for HPI and Oil & Gas Industry

South America

Jundiai, Brazil

Engineered and pre-engineered pumps for Oil & Gas, HPI and Water & Wastewater

Curitiba, Brazil

Submersible pumps for the wastewater market in South America, MSHA approved dewatering pumps for the USA market and also process pumps for the pulp and paper industry

 *Manufacturing facilities*



Manufacturing Facilities - APAC

China

Dalian, China

Pre-engineered and engineered pumps for HPI, Oil & Gas, Pulp and Paper, Food, Biofuels, Metals and Fertilizers, mainly domestic

Suzhou, China

Engineered pumps for Power Generation and Oil & Gas applications

Kunshan, China

Assembly plant with focus on wastewater applications

India

Navi Mumbai, India

Pre-engineered and standard pumps for HPI, Power and industrial markets, engineered pumps for Power applications



 *Manufacturing facilities*

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Customer Service Center (CSS)

Your Ideal Service Partner

Our expertise and commitment always deliver:

- Reliability
- Responsiveness
- Rapid turn-around
- Innovative solutions



A Full Range of Services



Diagnostic and consulting services

- Take informed decisions and maintain control of your process



Maintenance and support services

- Maintain your equipment to industry best practice



Technical and economic optimization

- Get the most from your assets





Diagnostic and Consulting Services Inspection

SULZER

Mechanical inspection

- Detailed report on the mechanical condition of equipment

Performance analysis

- Detailed report on the hydraulic performance of equipment

System analysis

- Recommendations to improve overall system performance





Diagnostic and Consulting Services Monitoring

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On site monitoring

- Regular measurement can identify problems before they fully develop

Remote monitoring

- Real time monitoring for maximum equipment availability





Diagnostic and Consulting Services Consulting

SULZER

Training schools

- Increase the technical and practical knowledge of your maintenance teams

Shut down planning

- Maximize the use of restricted shut-down windows





Maintenance and Support Services

On Site Service

SULZER

Commissioning

- Ensure equipment is running according to specification

On site repairs

- Bring equipment back into operation within a minimum timeframe

Troubleshooting

- Identify the root cause of problems and correct them





Maintenance and Support Services

Workshop Service

SULZER

Repairs and renewal

- Return your pumps to «as new» condition

Refurbishment

- Repairing parts can be more economical than replacing them

Contract maintenance

- Frame contracts simplify administration and support cost forward planning





Maintenance and Support Services

Spare Parts

SULZER

OEM parts

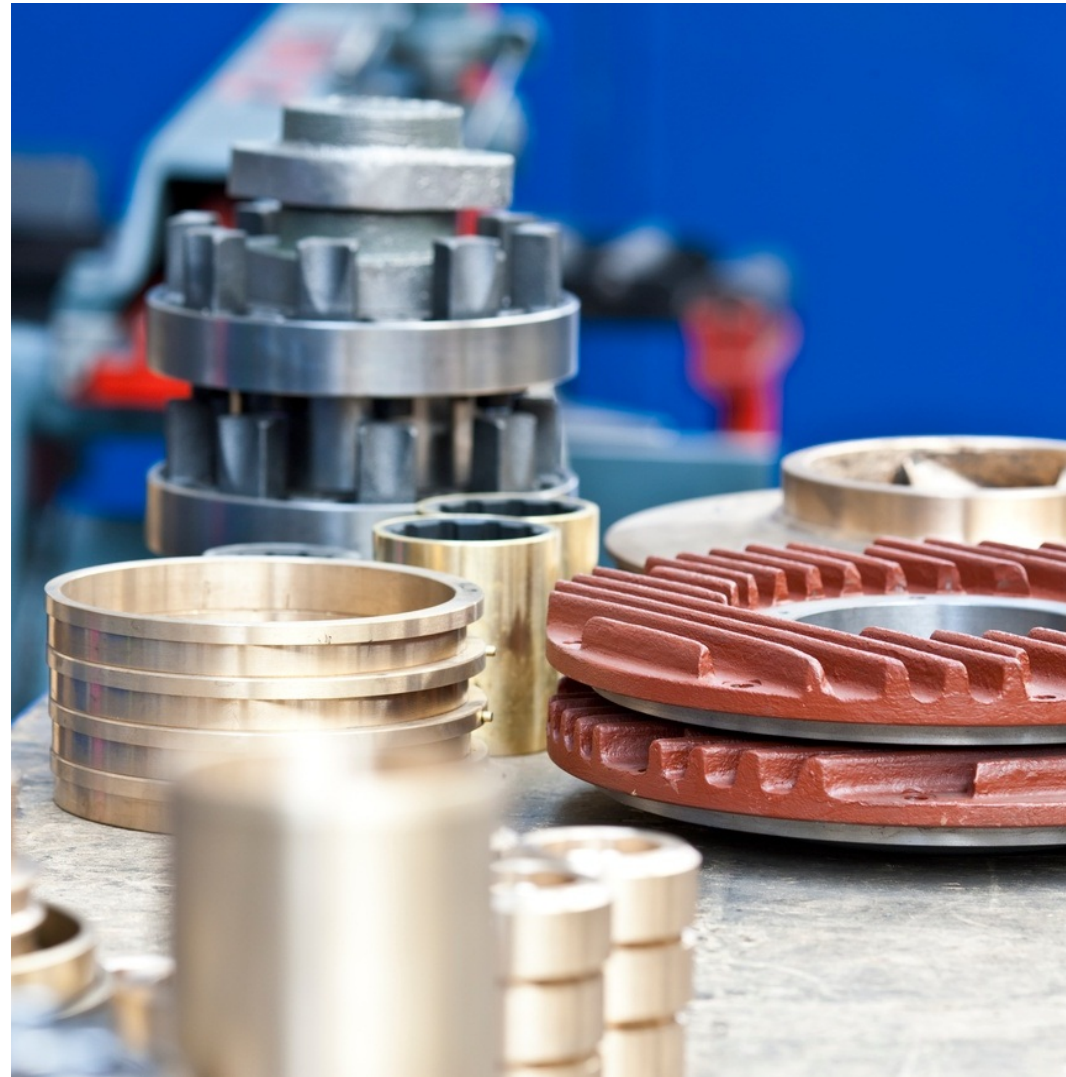
- Deliver optimum functionality and life

Inventory management

- Take inventory off your books and remove management burden

Re-engineering

- Parts may be manufactured when no longer available or difficult to source





Technical and Economic Optimization

Technical Improvement

SULZER

Mechanical upgrades

- Benefit from the latest designs and materials

Hydraulic upgrades

- Improve performance and efficiency

Retrofits

- Adapt your existing equipment for new duties





Technical and Economic Optimization

Reliability Increase

SULZER

Predictive maintenance

- Plan ahead rather than react to breakdowns

Bad actors program

- Fix 20% of equipment that causes 80% of the problems

Performance based contracts

- Only pay for the availability and performance delivered





Technical and Economic Optimization

Economic Optimization

SULZER

Life cycle management

- Optimize long-term operational costs

Asset management

- Delegate operation of your equipment to the industry experts

