

# SGS Group Presentation

## Vereniging voor Nutrienten Analyse

WHEN YOU NEED TO BE SURE

**SGS**

DELIVERING **TRUST** BETWEEN PEOPLE,  
ORGANISATIONS AND GOVERNMENTS



WHEN YOU NEED TO BE SURE

**SGS**



## A BRIEF HISTORY OF SGS

- Founded in Rouen in 1878, under the name of Goldstück, Hainzé & Co.
- First registration as Société Générale de Surveillance in Geneva in 1919
- Growth by agglomerations of various companies which until 2002 had great degree of autonomy
- Listed publicly in 1985
- Single share structure introduced in 2001
- Four significant shareholder groups
  - Famille A. Von Finck
  - IFIL investment
  - Allianz SE
  - FMR Corp

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## OUR VISION



- We aim to be the **most competitive and the most productive** service organisation in the world.
- Our core competencies in **inspection, verification, testing and certification** are being continuously improved to be **best-in-class**. They are at the heart of what we are.
- Our chosen markets will be solely determined by our ability to be the most competitive and to consistently deliver **unequalled service** to our customers **all over the world**.

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## OUR VALUES

We seek to be epitomised by our **Passion, Integrity, Entrepreneurship** and our **Innovative spirit**, as we continually **strive to fulfil our Vision**.

These values **guide us in all that we do** and are the bedrock upon which our organisation is built.



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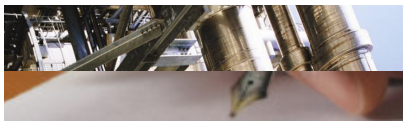
## DELIVERING **TRUSTED** TESTING, INSPECTION, VERIFICATION & CERTIFICATION

EXPERTISE  
ACROSS INDUSTRIES

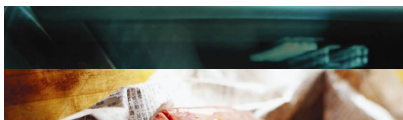
- Inspection
- Verification
- Testing
- Certification



ACTING ON PROCESSES,  
PRODUCTS, ASSETS



SERVING BUSINESSES,  
GOVERNMENTS & END USERS



TO DELIVER SUSTAINABLE  
RESULTS



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THE WORLD'S **LEADING** INSPECTION, VERIFICATION, TESTING AND CERTIFICATION COMPANY.

- More than 65'000 employees
  - Europe, Middle East & Africa: 29'400 employees
  - Americas: 12'100 employees
  - Asia/Pacific: 23'500 employees
- A network of over 1'000 offices & 628 laboratories



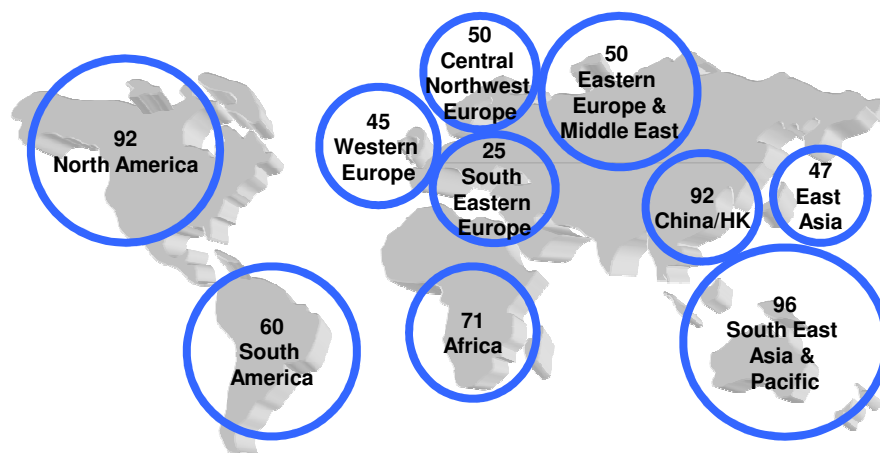
← FROM FIELD TO CONSUMER →

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SGS NETWORK – **ALL BUSINESSES**

- Worldwide, SGS currently operates **628** laboratories in **92** countries



\*NOTES: data from Global Laboratory Excellence System database, as of 03 AUGUST 2010

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## THE SGS BUSINESSES



**Environmental Services**



**Life Science Services**



**Automotive Services**



**Trade Assurance Services**



**Systems and Services Certification**



**Agricultural Services**



**Consumer Testing Services**



**Minerals Services**




**Industrial Services**




**Oil, Gas & Chemicals Services**

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## OIL, GAS & CHEMICALS SERVICES

“Business as usual is not enough.”



Serving the whole OGC industry, supply chain and stakeholders across the globe

**WE DELIVER:**

- Unbiased reliable facts and information under all circumstances (anywhere, any place, anytime)
- Tailored solutions and process that add value

**TO HELP:**

- Increase speed and quality of decision making
- Protect & secure business interest around the globe
- Increase flexibility to do business

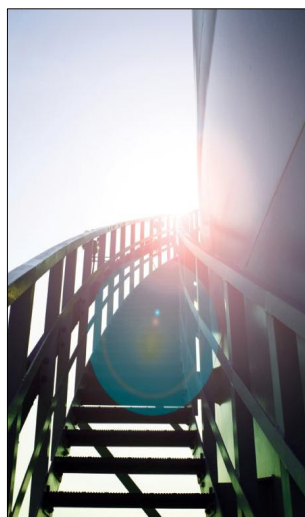
**WHY SGS:**

- Unequalled OGC laboratory network
- Supported with pragmatic experts, eager to assist

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## THE OGC INSPECTION, TESTING & RELATED SERVICES MARKET



### The Market is steadily increasing

- Organic growth around 10 % per year
- Follows global energy consumption, industry feedstock, trade volatility
- Is subject to seasonal-, trade flow- and geopolitical shifts, developments
- Renewed upstream focus

### ■ Estimated Market Share – Q&Q

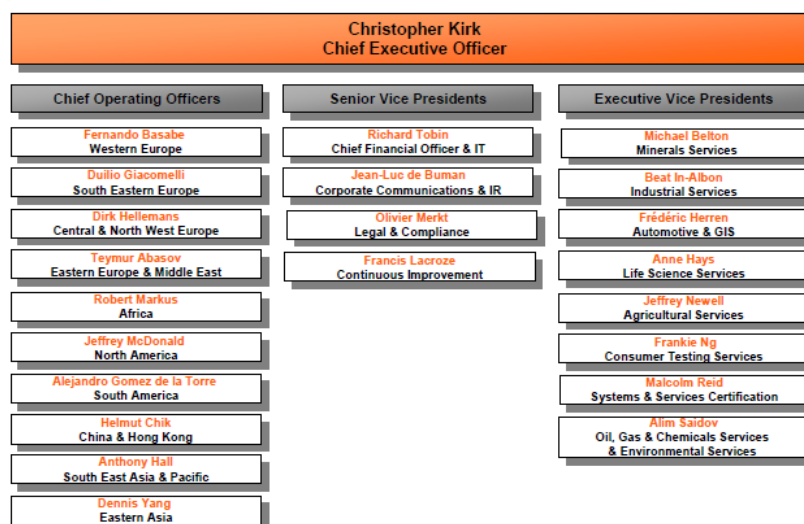
- SGS OGC 40% - CHF 1.0b
- ITS Caleb Brett 32% - CHF 0.8b
- Saybolt 10% - CHF 0.3b
- BV Inspectorate 13%
- Other 5%

### ■ SGS OGC – strengths in EU, Russia, Asia Pac, China, East Asia, & South America with over 12,000 FTE

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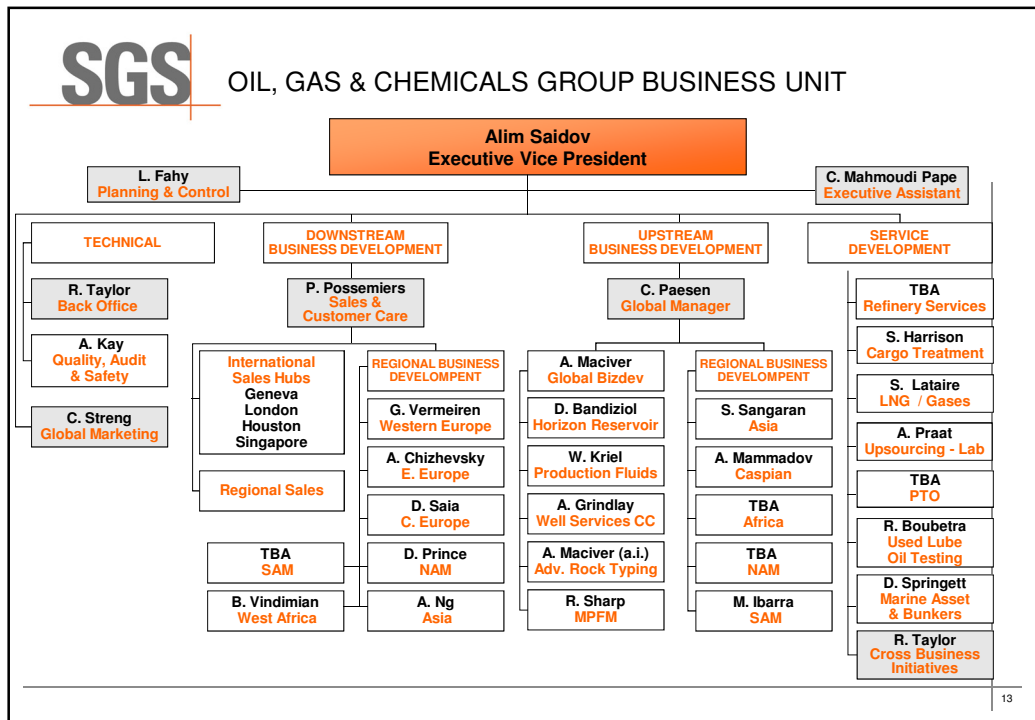


## THE OPERATIONC COUNCIL



January 2010

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**SGS**

**EXPLORATION**  
**PRODUCTION**  
**TRANSPORTATION**  
**OPTIMISATION**  
**DEDICATION**  
**VISION**

**SOLUTIONS FOR OIL, GAS & CHEMICALS**  
THAT GO **ON** AND **ON** AND **ON**...

Oil, Gas & Chemicals Services

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## THE OGC SERVICES IN MORE DETAIL



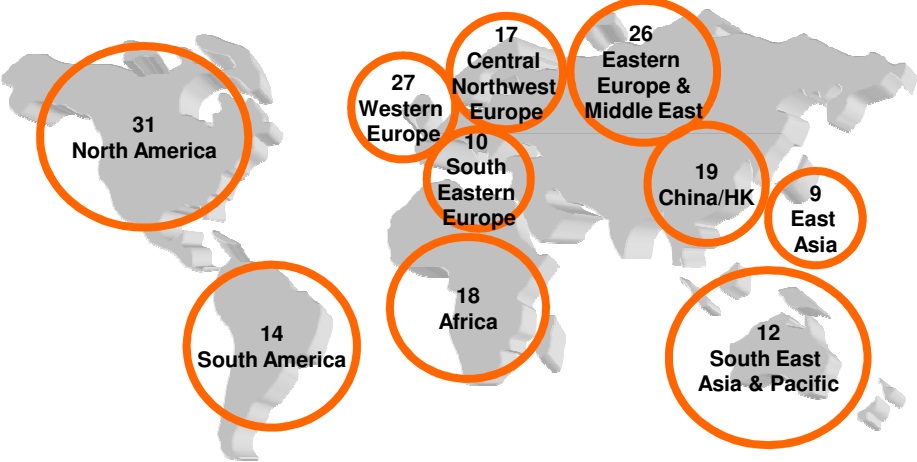
- **The main commodities we are involved with**
  - Crude OIL, PETROLEUM Products, CHEMICALS, GASES
- **Services for Supply, Trade & Distribution**
  - Field INSPECTION and Laboratory TESTING
  - Value added & Risk Management – Blending, Audits
  - Process Optimisation – global contracts, on-site labs
- **Contract Services for our Industry Clients**
  - PTO & related Logistic service
  - Laboratory Outsourcing
  - Financial related services – CMA
  - Reservoir Engineering & Production Accounting
- **Other Services**
  - Sample Management- SAMAN
  - Emergency Response Systems
  - Fuel Integrity Programs

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## OIL, GAS & CHEMICALS LABORATORY NETWORK

■ Currently operates **183** laboratories in **71** countries

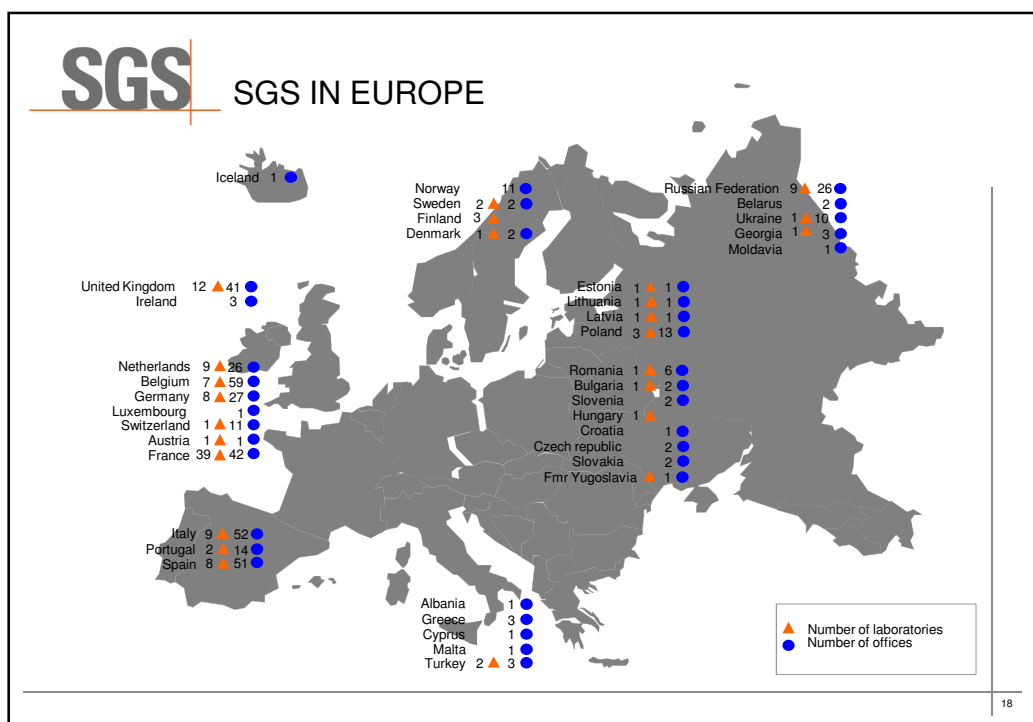
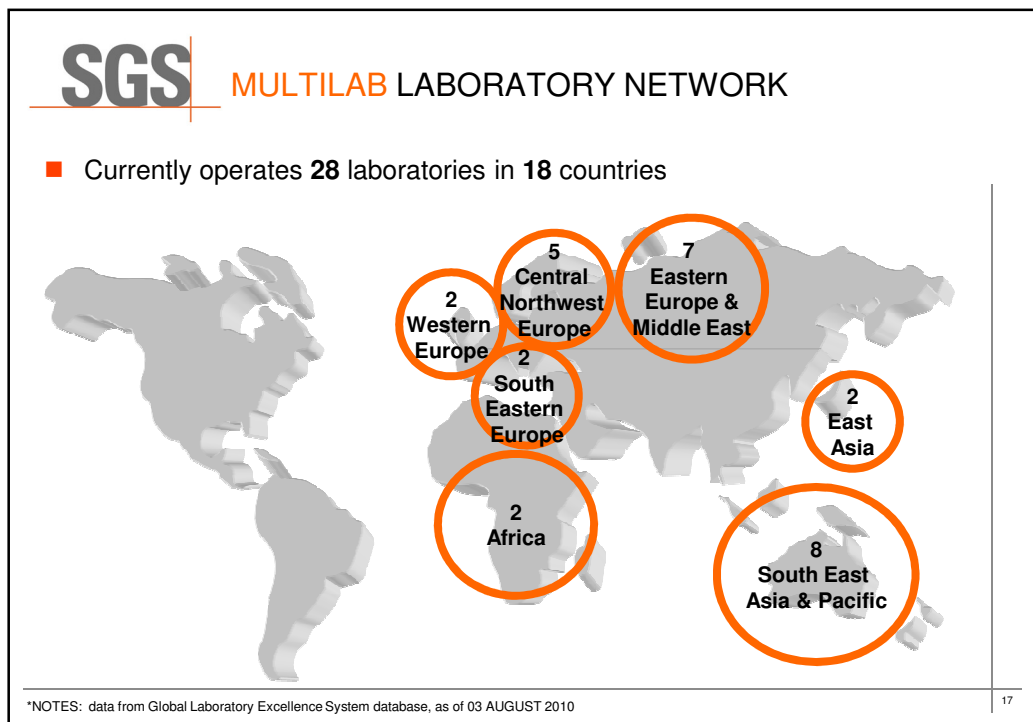


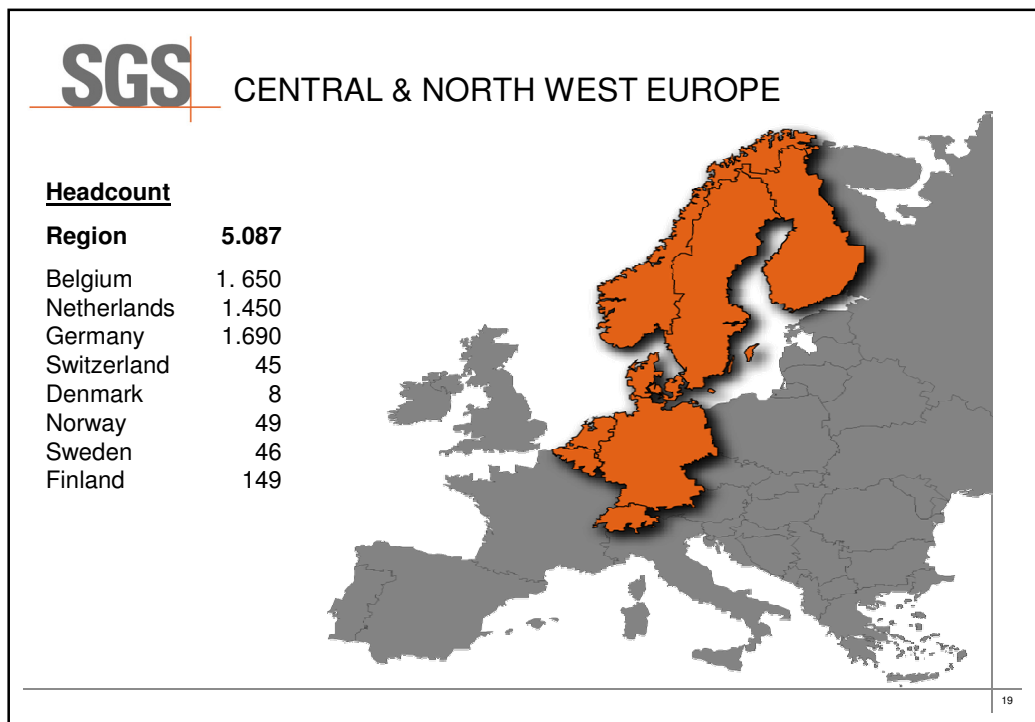
Region	Number of Laboratories
North America	31
South America	14
Western Europe	27
Central Northwest Europe	17
South Eastern Europe	10
Africa	18
Eastern Europe & Middle East	26
China/HK	19
East Asia	9
South East Asia & Pacific	12

\*NOTES: data from Global Laboratory Excellence System database, as of 03 AUGUST 2010


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**SGS** SGS – BENELUX




Integrity  
Passion  
Entrepreneurship  
Innovative spirit




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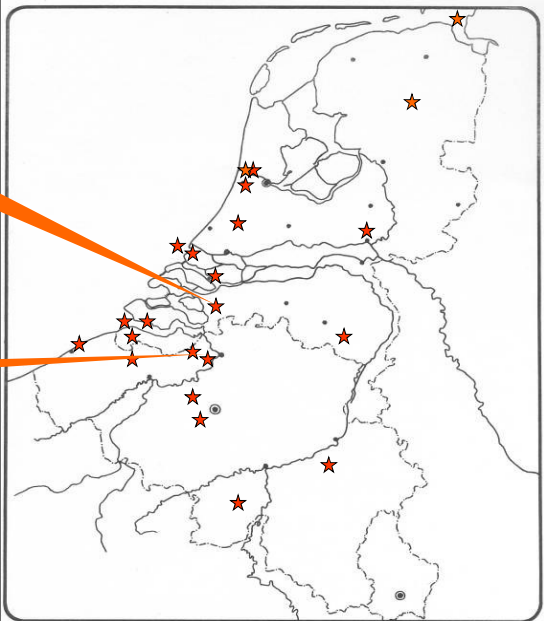
# SGS

HQ NL Spijkenisse



HQ BE Antwerpen





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# SGS

## INTEGRITY

- Act as an impartial intermediary to persons in question
- Our code of professional conduct

"Integrity is at the core of the business of the SGS Group, it is the common thread through all our activities".

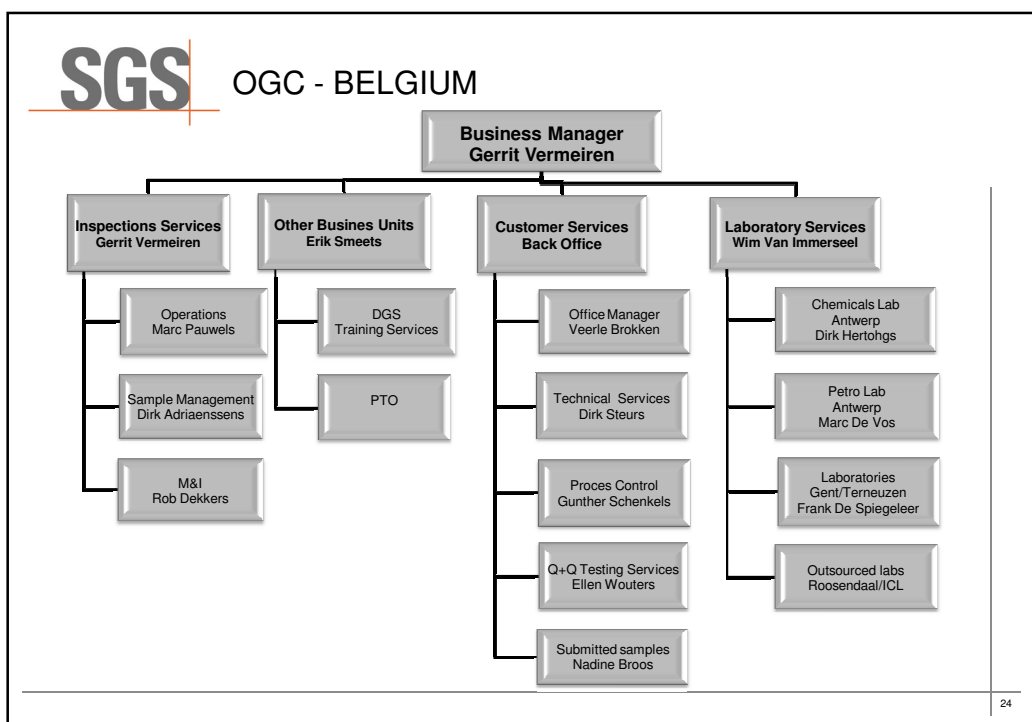
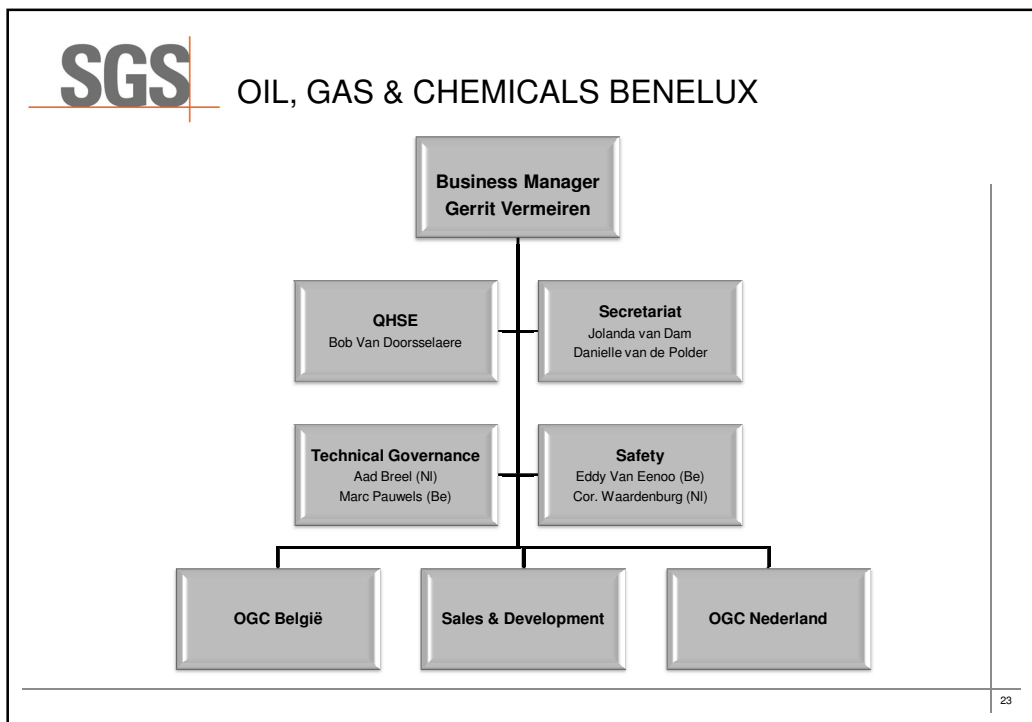


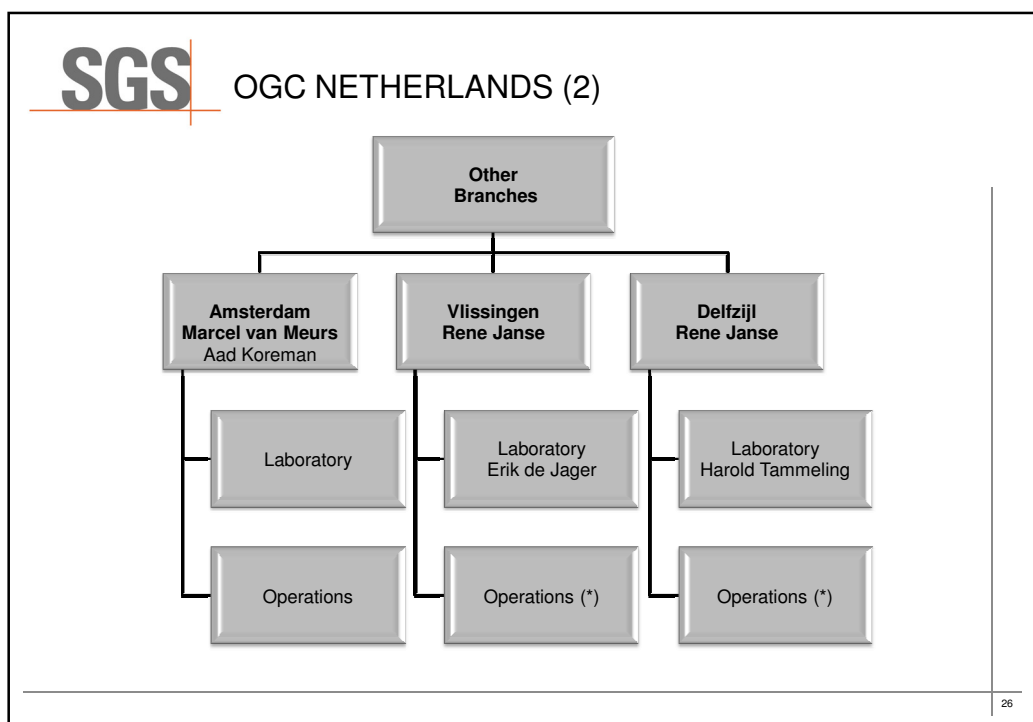
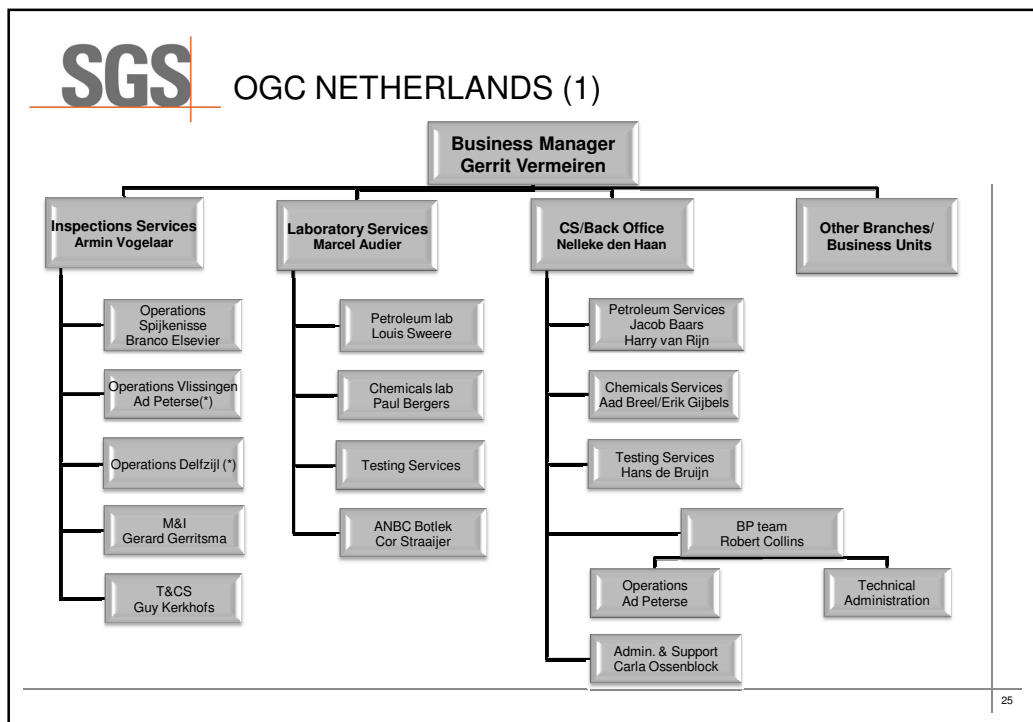


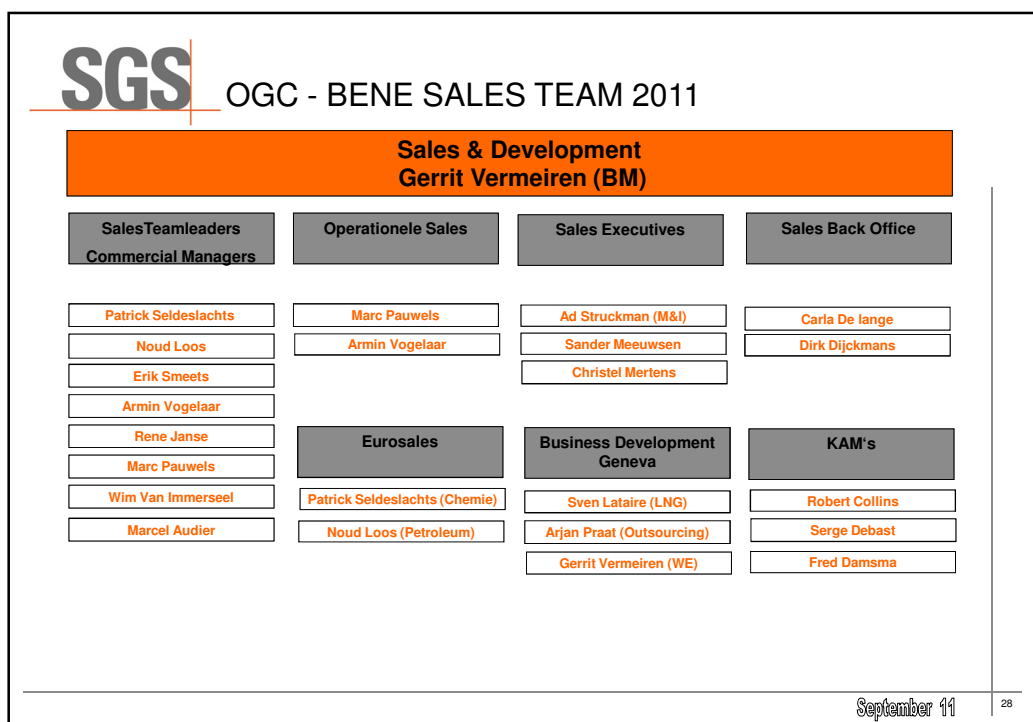
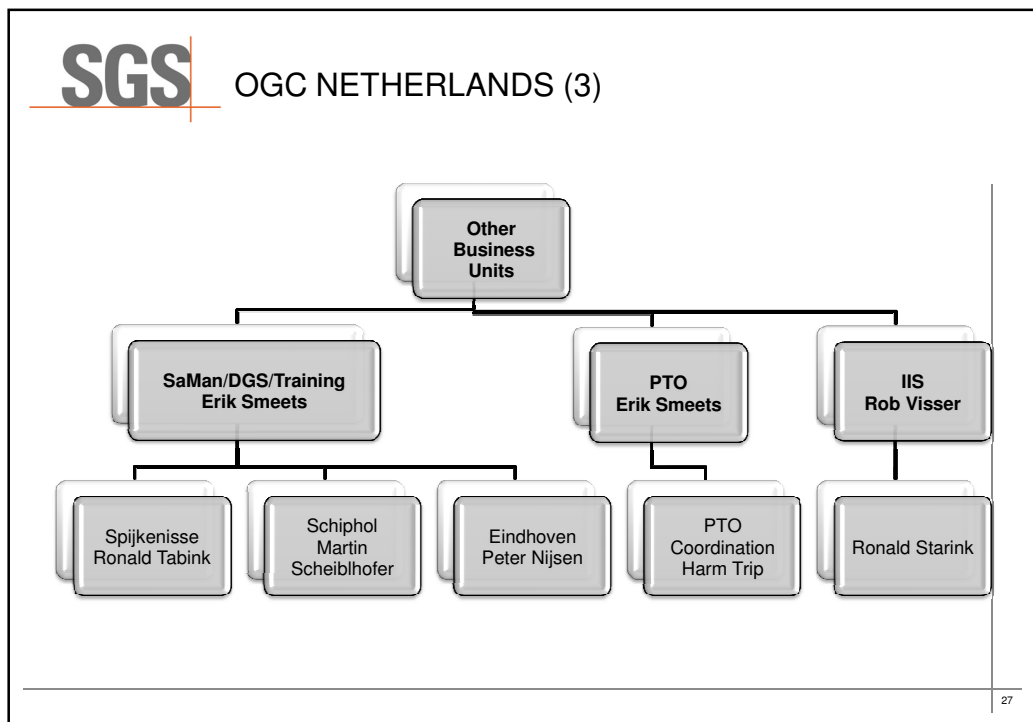
**THINK**

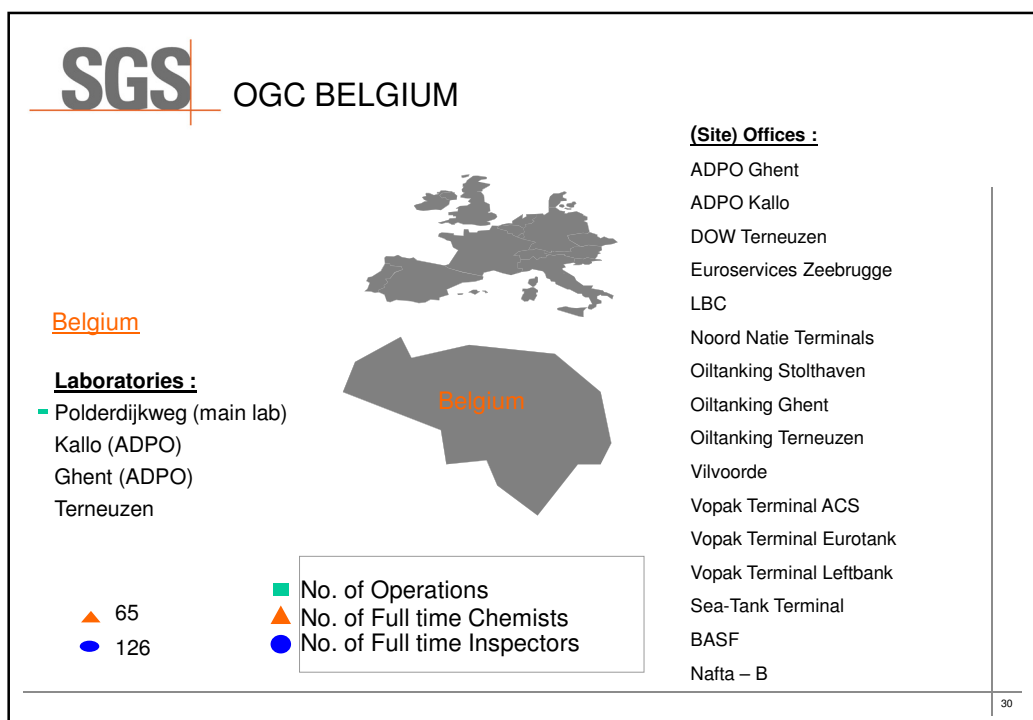
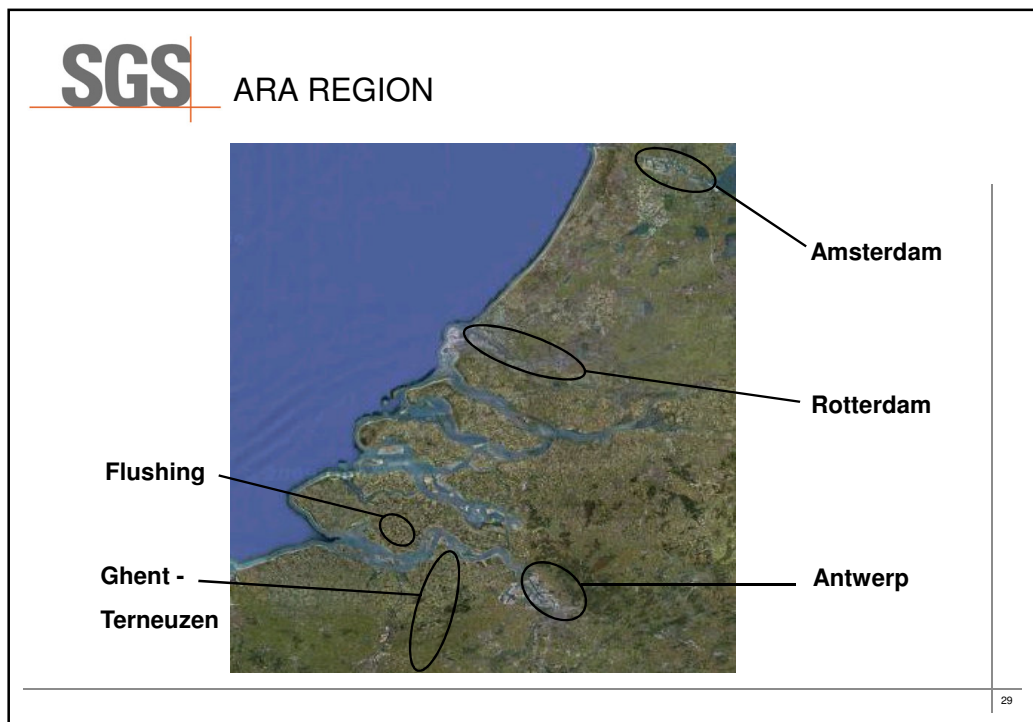
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## STORAGE TERMINALS IN BE & NL

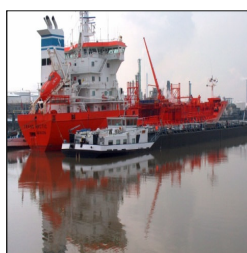
Belgium	The Netherlands
ADPO Antwerp	Argos
ADPO Gent	Caldic Chemie
LBC Terminal Antwerp	Koole Tankstorage Pernis
Nafta B	LBC Terminal Rotterdam
Noordnatie Terminals	Maastank International
Oiltanking Gent	Maasvlakte Olie Terminal
Oiltanking Stolthaven Antwerp	Odfjell Rotterdam
Sea Tank Terminal Antwerp	Oiltanking Amsterdam
Sea Tank Terminal Gent	Oiltanking Terneuzen
Vopak Chemicals Logistics Belgium	Rubis
Vopak Terminal ACS	Vopak Terminal Amsterdam
Vopak Terminal Linkeroever	Vopak Terminal Botlek (Noord)
	Vopak Terminal Botlek (Zuid)
	Vopak Terminal Chemiehaven
	Vopak Terminal Europoort
	Vopak Terminal Laurens Haven
	Vopak Terminal TTR
	Vopak Terminal Vlaardingen
	Vopak Terminal Vlissingen

xxx = office on site

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## OIL, GAS & CHEMICALS BENELUX



### ■ Main commodities

- Chemicals, Crude Oil, Petroleum Products, Bio fuels and Gases

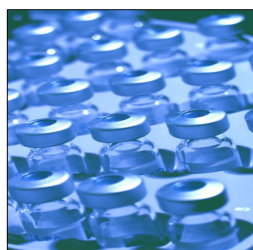
### ■ Specialized and Related Services

- Field Inspection and Laboratory Testing
- Quality and Quantity control
- Independent testing and analysis, from crude oil assay through to Fine Chemical intermediates
- Value added blending and Additives
- Vessel Expediter / Superintendent Services, Demurrage analysis (added value service)
- Preventive Marine Testing and Problem-solving expertise and technical consultancy

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## OIL, GAS &amp; CHEMICALS BENELUX



## ■ Specialized and Related Services

- PTO » In Plant Logistics, Chemical plant support on-site & Port Operations (Up-Sourcing Solutions)
- Laboratory and testing Services
- Measurement and Instrumentation
- Industry and instrument specific training programs
- Customer specific web-enabled e-commerce capabilities for every aspect of the analysis process
- Calibration Service – tanks, meters, & vessels
- Emergency Response System
- Sample Management
- Total Waste Management
- Upstream Sourcing (Gas, Oil and Platform Manning)

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## OIL, GAS &amp; CHEMICALS BENELUX



## ■ Laboratory Services 'Partnering the experts'

- Analyses performed in accordance with ASTM, ISO, DIN, UOP or clients methods
- Statistical evaluations and independent reports
- Analyses of fuels during transactions and fuel-quality surveys
- Analyses and testing for "Amines and Sulphur Management"
- Arbitration, Witnessing and counter-expertise.
- Participation in inter-laboratory studies for method validation, proficiency tests and certification
- Outsourcing, Laboratory Management and/or staffing
- Method development
- Modern laboratories; 24hrs per day, 365 days per year
- Accredited according to ISO 9000, EN 45001 and ISO 17025 standards

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## OIL, GAS & CHEMICALS BENELUX

### Ship Services

Loading and discharging of sea going vessels and barges

- Positioning of the ship
- Port control and vessel scheduling and berthing
- Lining up of the transfer piping circuit
- Sampling of (ship's) tanks
- Hose connection and jetty manning
  
- Safety checklist preparation
- ISPS control
- Loading Master

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## OIL, GAS & CHEMICALS BENELUX



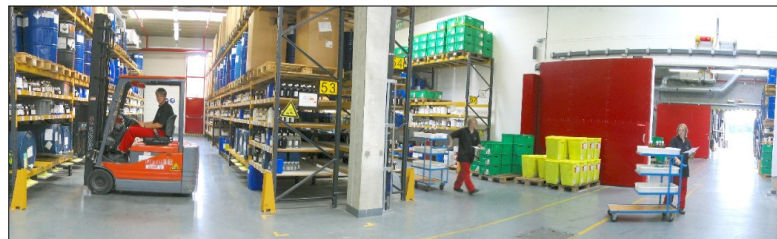
### ■ Plant & Terminal operations: Supply Chain Integration

- Provide personnel solutions for the refining, (petro) chemical and marine transportation industries
- Loading and discharging of sea going vessels and barges; jetty operations, field, control room and loading master
- Loading and discharging of road tankers and rail tank cars
- Blending operations
- Managing drumming lines and process operations
- Process operators on project basis during shut down periods

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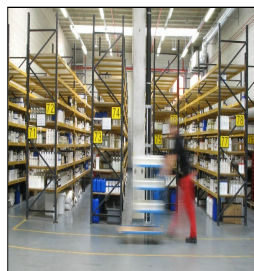
## SAMPLE DISTRIBUTION CENTRE ANTWERP



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## SAMPLE MANAGEMENT



### The perfect first impression

- Storage and handling of dangerous goods
- Packing, labeling and documentation
- Stock inventory and a customized replenishment management
- Acts as "Shipper" and issue documents and Dangerous Goods Certificates.
- Dispatches samples world-wide ( door to door) with adequate follow – up and reporting.
- Splitting of pails or drums into smaller samples
- A true global < one stop > sample distribution solution.
- Representative samples are prepared for world wide door to door distribution.
- Samples are packed in UN approved boxes and accompanied with all required transport documents, MSDS and CoFA

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## SAMPLING & RECONDITIONING, PACKING LABELLING AND DOCUMENTATION



- Sampling and decanting
- Splitting of liquids or powders into smaller receptacles
- Heating of viscous products
- Refrigerated sample storage
- Homogenising
- Disposal of expired stocks
- Laboratory testing services
- Professional packing and labelling
- Conformity all safety legislation:  
**IATA, ADR and IMDG**
- IATA Trained personell

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## OIL, GAS & CHEMICALS BENELUX

### Terminal Services

Loading and discharging of road tankers and rail tank cars

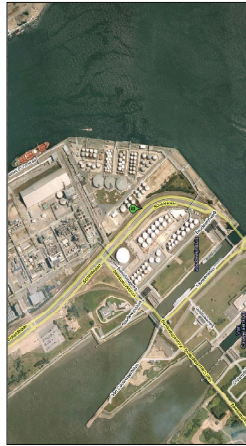


- Handling at loading stations
- Lining up of piping circuits
- In-line blending according to requirements
- Inventory management
- Sampling of all tank types
- Issuance of shipping notes
- Blending Operations

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## OIL, GAS & CHEMICALS BENELUX



### ■ SGS at Terminals

#### 'Expert' Services at terminals

- Full equipped office on site at terminals to provide :
  - - Enhanced communication
  - - Regular and accurate updates
  - - Improved field expertise of stored products for terminal specific handlings
  - - Reduction on cycle time for trucks, containers, ships, ...
- Key test laboratory on side
  - - Aspect , Water (KF & Coulomat) , Colour, Refractive Index, Breakdown voltage, Fast GC analyses ...
- Atmospheric measurement equipment (Oxygen, LEL)

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## SGS OGC BENELUX COMPETENCE CENTRE



- Blending & Additivation
- Sample Management
- DGS-Airport services-BioLogitics Services
- Gas Chromatographic Institute
- Ship/Shore tank Calibration
- Gas Technical Center
- LNG Development
- T&CS – Tank & Container Services
- IIS – Institute of Interlaboratory Studies
- Training - Transport regulations
- In-line Analysers – Delfzijl
- PTO – Plant & Terminal Operations

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[www.sgs.com](http://www.sgs.com)

WHEN YOU NEED TO BE SURE

