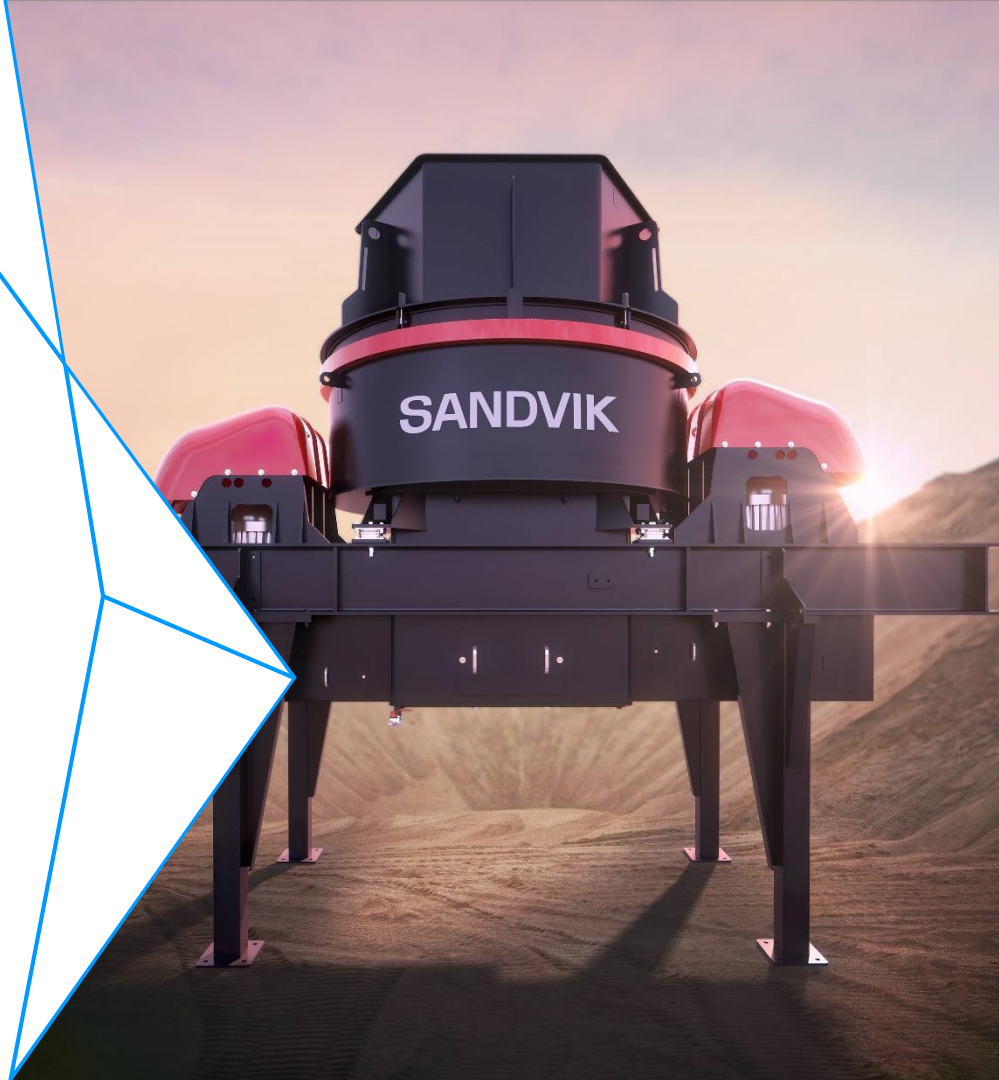




SANDVIK ROCK PROCESSING SOLUTIONS CAPITAL MARKETS DAY 2020

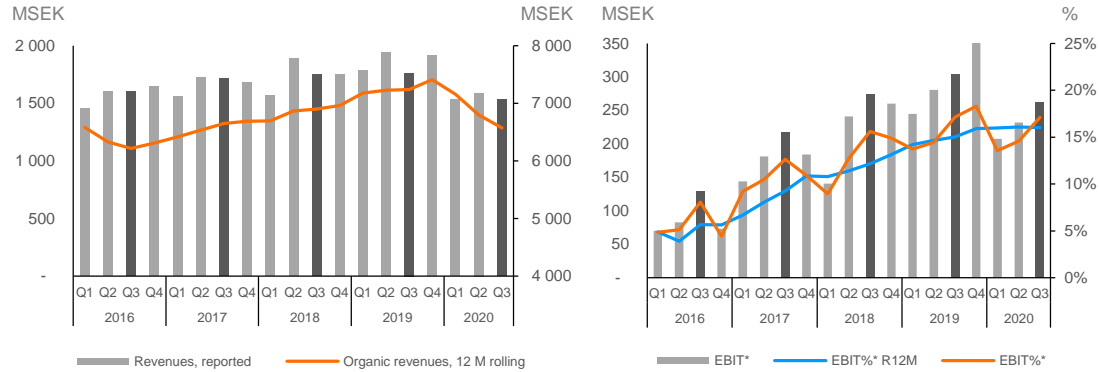
ANDERS SVENSSON
President

November 3, 2020



SRP IN BRIEF

SALES AND EBIT DEVELOPMENT (FY2019 ROCE 25%)

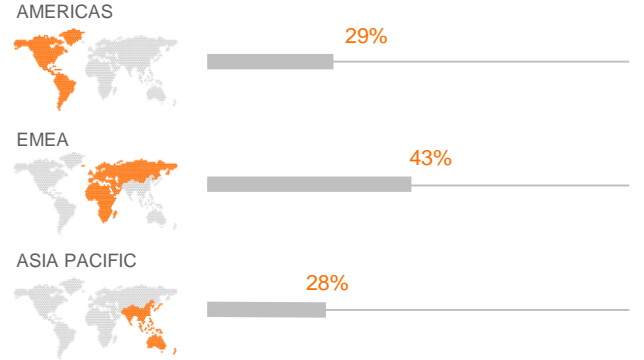


*Adjusted for Items Affecting Comparability

SALES BY SEGMENTS



GEOGRAPHY



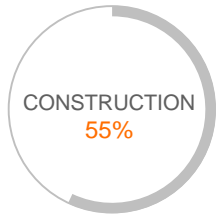
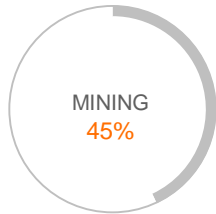
12 months Q419 – Q320



SRP VS. MARKET GROWTH OUTLOOK

INDUSTRY EXPOSURE

SRP SALES EXPOSURE

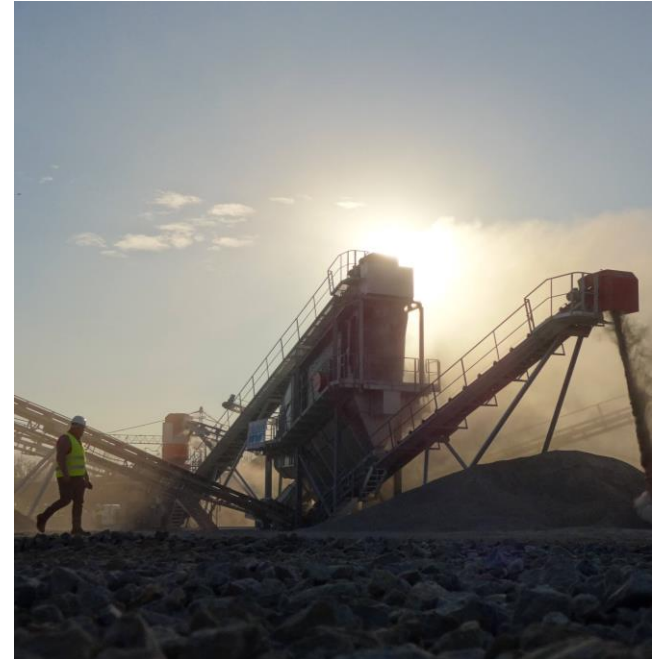


GROWTH RATES

SRP weighted
growth outlook **2.5 - 3%**

Mining industry
total **~ 2%**

Construction
industry total **~2%**



DEMAND DRIVERS

CUSTOMER TRENDS SHAPING THE MARKET

More energy-efficient comminution, processes and technologies together with larger data sets drive development within the industry. This contribute directly to the industry's target of sustainable comminution, protecting the environment, and reduce operational costs while delivering shareholder value.

SUSTAINABILITY FOCUS IN MINING PROCESSING

Eco efficient comminution gaining traction as customers focuses on energy and water conservation



SHIFTING DYNAMICS IN QUARRYING

Consolidation towards larger capacity quarries driven by productivity, cost per ton, sustainability and EHS



DIGITALIZATION CONTINUES TO REMAIN IN FOCUS

Demand for digital services continues to grow.
Productivity gains and operations insights in focus



STRATEGIC FOCUS AREAS



Safe and
sustainable



Lifecycle
perspective



Eco
efficiency



Agile execution
with exceptional
people



Evolve portfolio
and partner-
ships

SETTING UP FOR GROWTH

The image shows four large industrial cone crushers from Sandvik, arranged in a row. From left to right, they are labeled CH420, CH430, CH660, and CH440. The crushers are primarily orange and grey. The CH660 is the largest. The background shows a mining site with a conveyor belt and hills under a cloudy sky.

SANDVIK CH420

SANDVIK CH430

SANDVIK CH660

SANDVIK CH440

Expand aftermarket offering

Acquisitions & partnerships

Sales channel optimization

Automation & digitalization

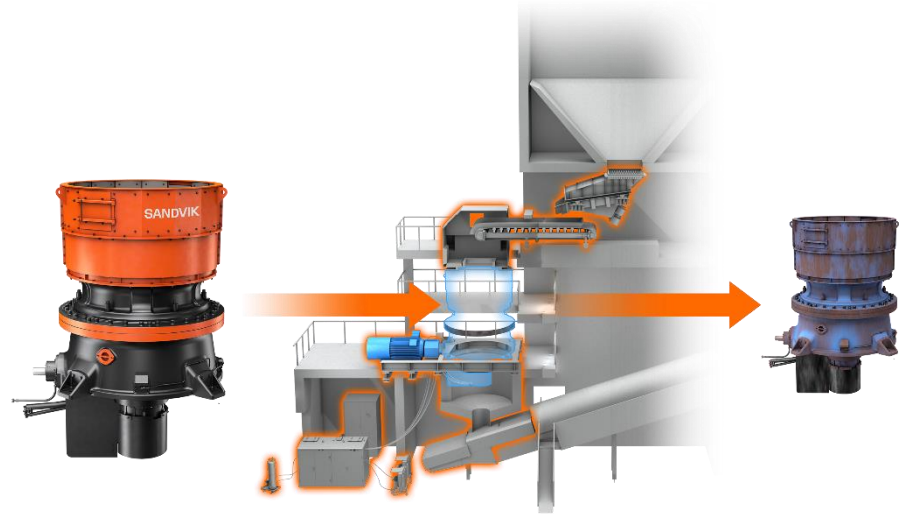
Eco efficiency

Expand aftermarket offering

When worn out becomes
new again

+30%

INCREASED AFTERMARKET PENETRATION
2019-2025



Acquisitions & partnerships

Complementary acquisitions or strategic partnerships in core and adjacent technologies and markets

ACQUISITIONS



PARTNERSHIPS



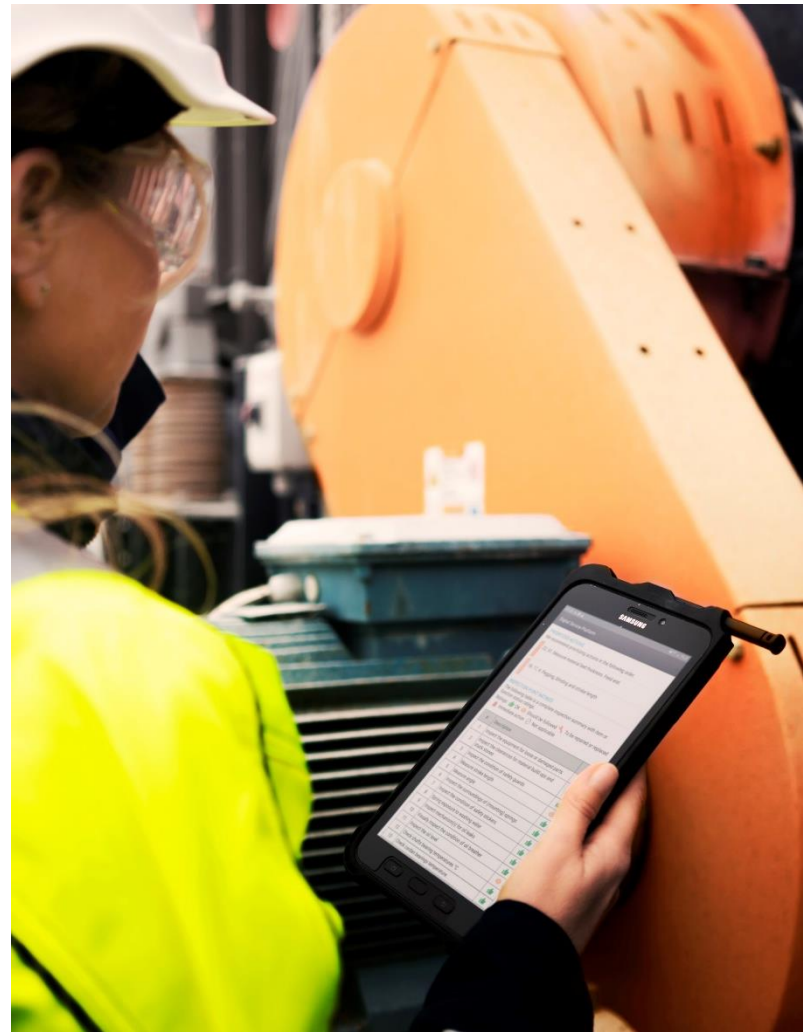
Sales channel optimization


Direct sales

Distributor sales

OEM sales

} Significant growth potential in indirect sales channels



A row of seven Sandvik 800i Cone Crushers is displayed in a dark, industrial environment. The crushers are arranged in a line, increasing in size from left to right. Each crusher is white with orange accents and has a digital overlay above it, showing various data points and graphs. The background is a dark, geometric structure, possibly a ceiling or a wall, with some lights visible.

Automation & digitalization

800i Cone Crusher series
Evolution on the outside,
revolution on the inside

>60%

Of our customers utilizing
our digital services 2025

Eco efficiency

Establish Sandvik Rock Processing Solutions as a market leader within eco efficient rock processing.



SETTING UP FOR GROWTH



SANDVIK

The logo consists of the word "SANDVIK" in a bold, blue, sans-serif font. Below the text is a solid blue horizontal bar. The entire logo is enclosed within a thin blue rectangular border.