

# INDUSTRIAL SERVICES

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# INDUSTRIAL SERVICES

LEADING OPERATOR  
OF CIRCULAR  
**ECONOMY SERVICES**  
FOR INDUSTRY



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# LEADING OPERATOR OF CIRCULAR ECONOMY SERVICES IN INDUSTRY IN FINLAND AND A STRONG POSITION IN SWEDEN

## BUSINESS LINES

### Environmental construction

- Soil remediation & projects
- Treatment centre operations

### Process cleaning

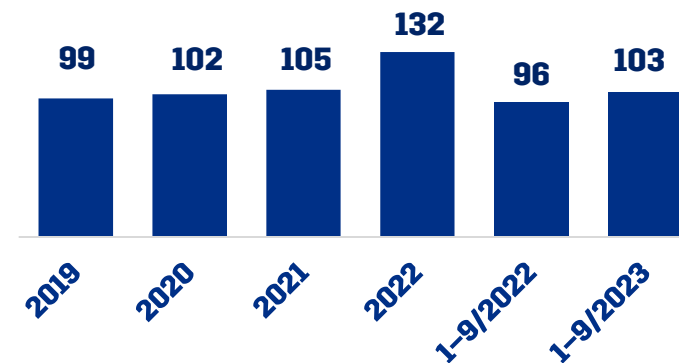
- Support services for industrial customers and sites
- Sewer maintenance

### Hazardous waste

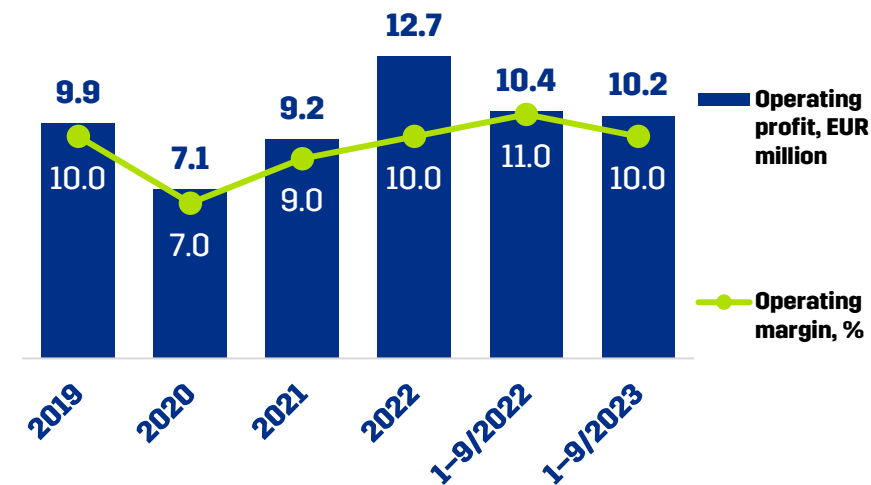
- Hazardous waste recycling operations
- Waste-based products for the industry



Net sales (MEUR)



Operating profit and margin



# TIGHTENING ENVIRONMENTAL REGULATION CREATES OPPORTUNITIES IN THE INDUSTRIAL VALUE CHAIN

	ENVIRONMENTAL CONSTRUCTION	PROCESS CLEANING	HAZARDOUS WASTE
L&T POSITION IN CURRENT MARKET	#2	#1-2 <sup>Fin</sup> #3-4 <sup>Swe</sup>	#1-2
RELEVANT MARKET SIZE (BEUR)	0.6*	0.4**	0.1*
ANNUAL MARKET GROWTH	2-5%		

\* Only Finnish market \*\*Finnish and Swedish market

Sources: L&T management estimates

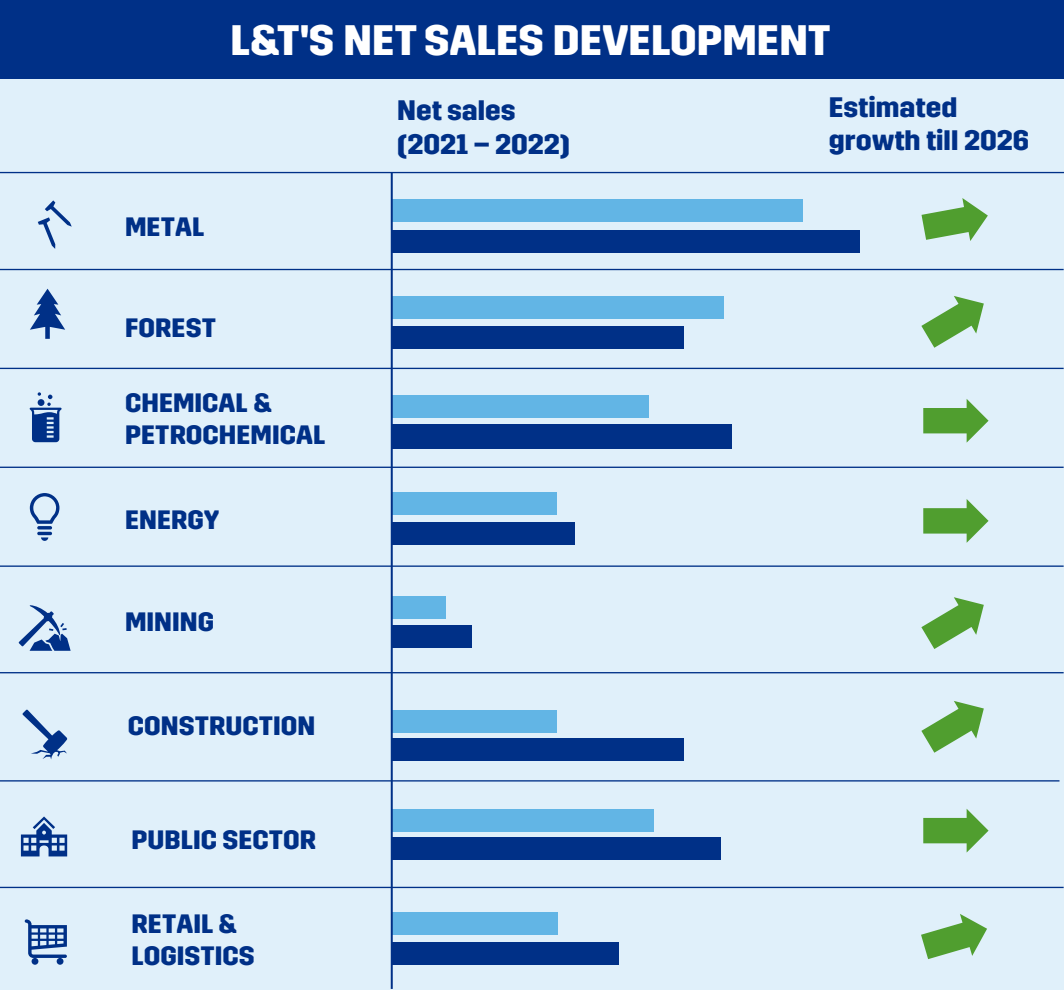
## Tailwinds

- Ever higher expectations for closed loops and minimising waste
- Sustainability focus supports replacing virgin raw materials with waste-based materials
- Customers focus on their own core processes creating new opportunities for support partners
- Growing cities and changes in the industrial landscape create need for soil remediation services

## Headwinds

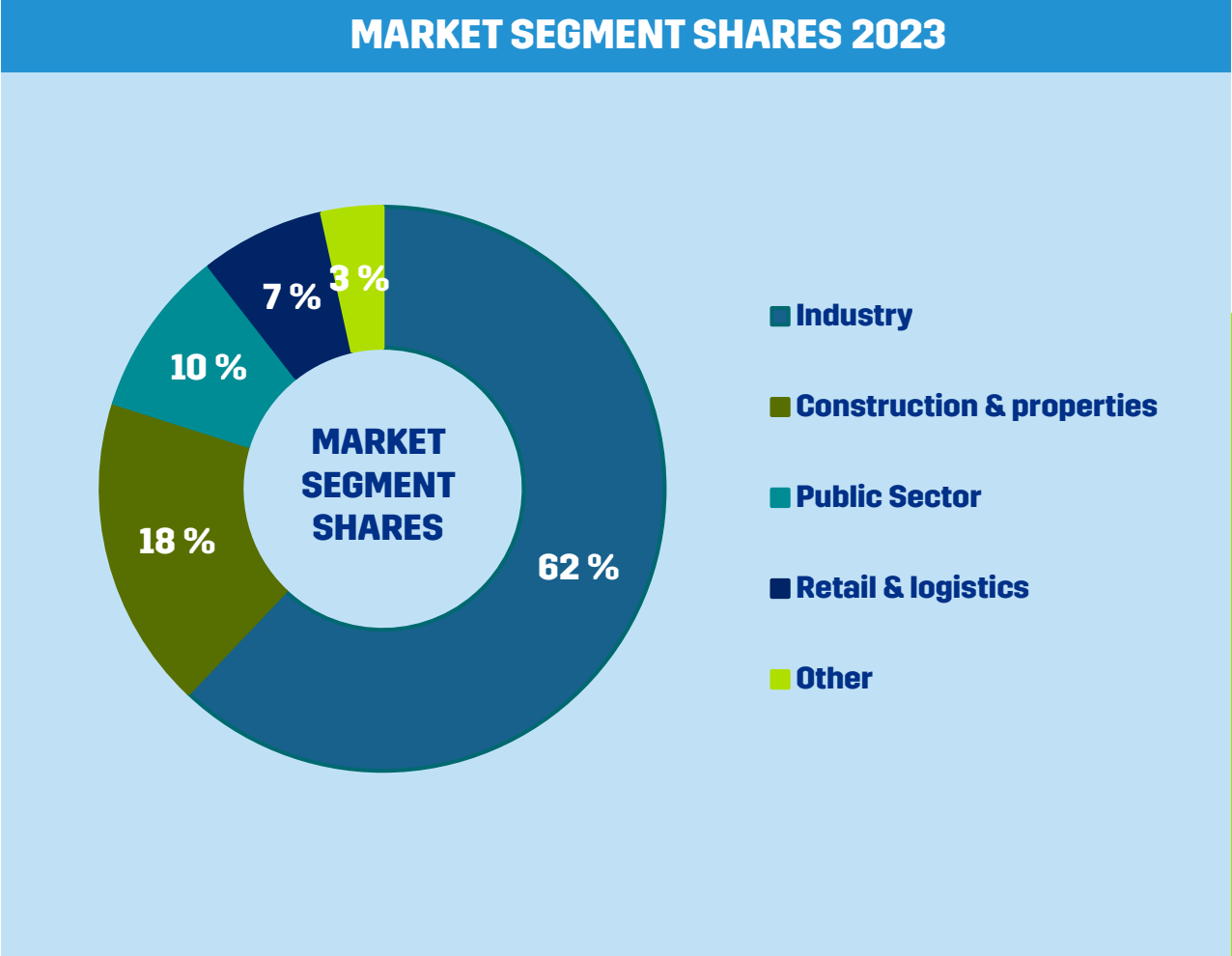
- Structural changes in the industrial sector in Finland lead to fewer and larger production sites
- Over-capacity in waste-to-energy in Finland

# GROWTH BY FOCUSING ON NEW OPPORTUNITIES ESPECIALLY IN PROCESS INDUSTRY AND BUILT ENVIRONMENT



■ 2021 ■ 2022

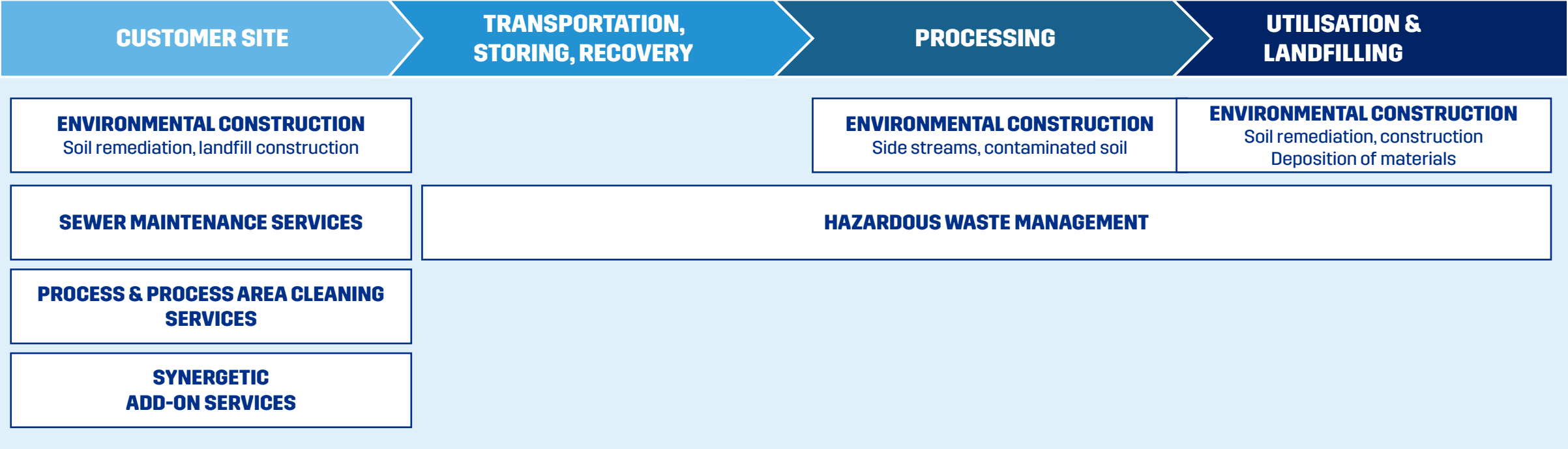
Illustrative image



Source: L&T management estimate



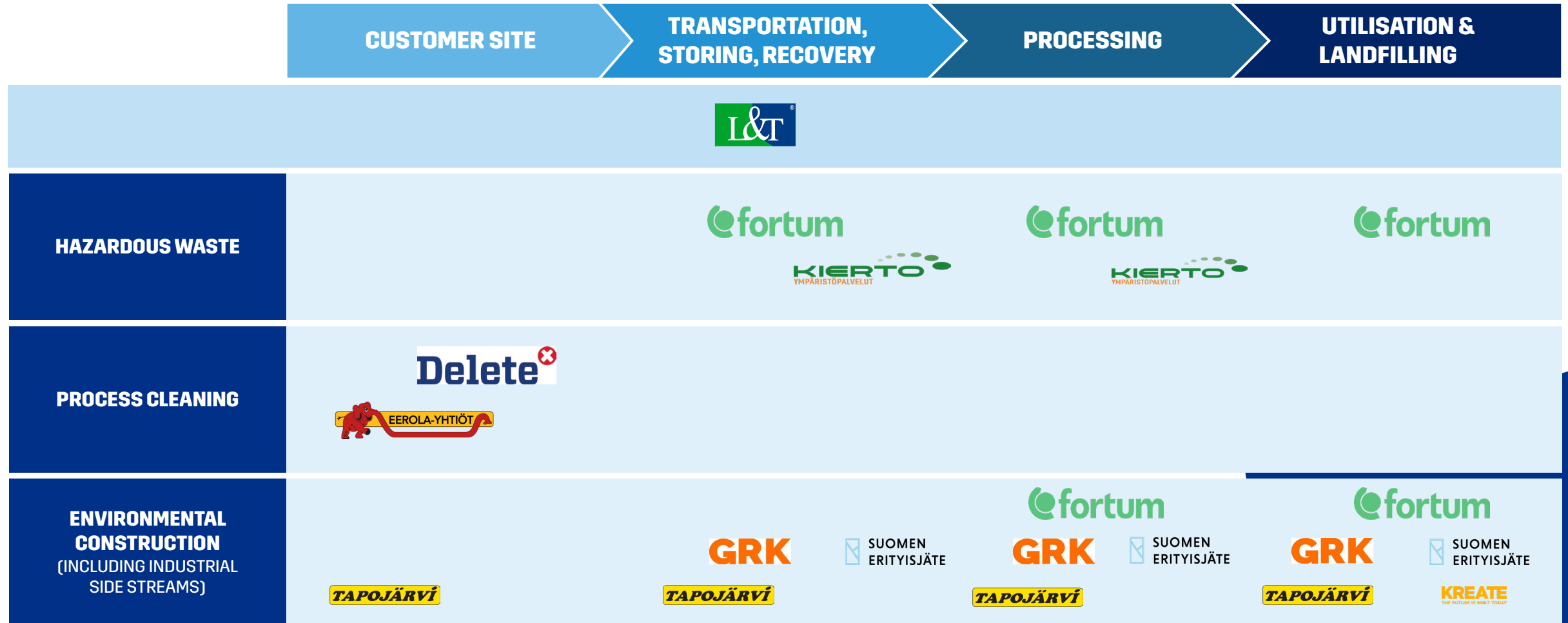
# EXTENSIVE SERVICE OFFERING IN INDUSTRIAL SUPPORT SERVICES AND INDUSTRIAL MATERIAL VALUE CHAIN



## SYNERGIES IN AND BETWEEN BUSINESS LINES AND ENVIRONMENTAL SERVICES



# STRONG PRESENCE IN ALL PARTS OF THE CUSTOMER'S VALUE CHAIN



Sources: L&T management

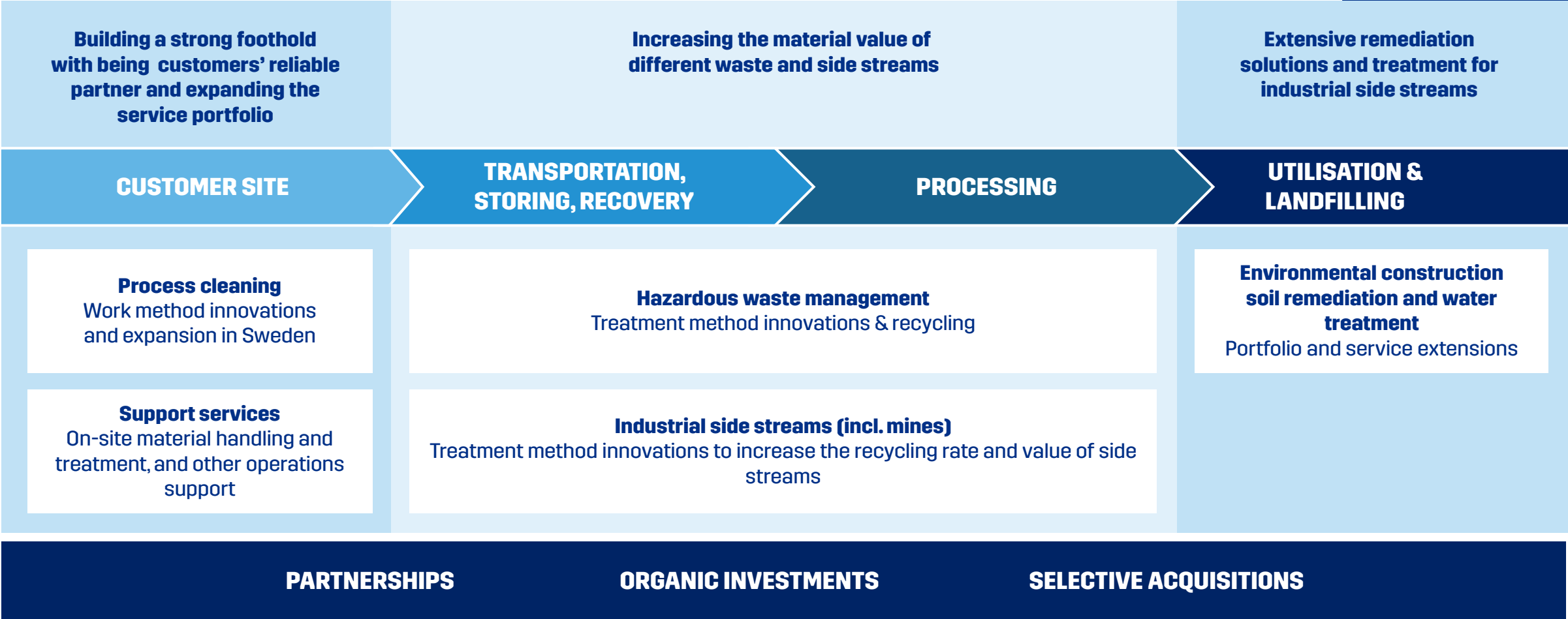






**STRONG CUSTOMER  
RELATIONSHIP  
PROVIDES ACCESS  
TO AND INSIGHT  
INTO CUSTOMERS'  
MATERIAL STREAMS**

# GROWTH FROM SEVERAL NEW SECTIONS OF THE VALUE CHAIN AND INCREASING THE VALUE-ADDED



# ON-SITE SUPPORT SERVICES ALLOW CUSTOMER TO FOCUS ON ITS CORE OPERATIONS

Broader portfolio of on-site support services that are synergistic to other industrial services

**Process area cleaning sewer maintenance**

**Production support services**

**Surface treatment services**

**Fixed washing units**

**Material handling**

**Site logistics**

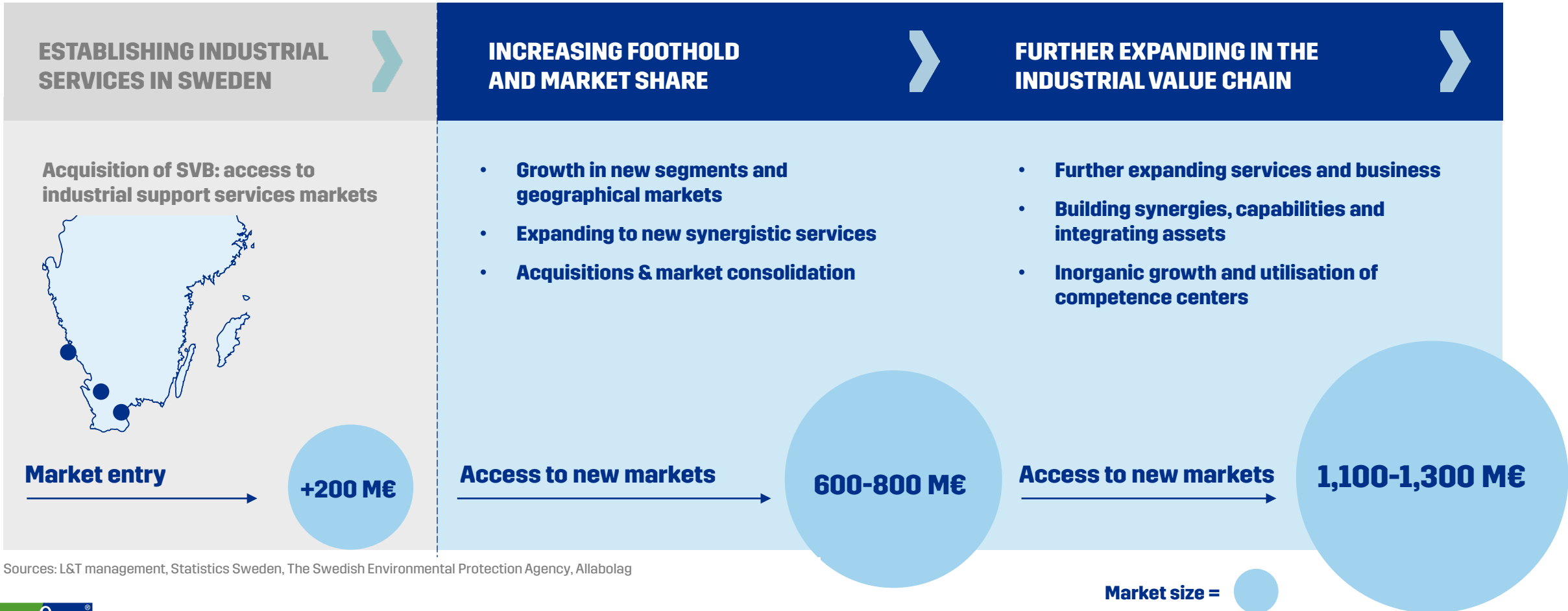
## CURRENT SERVICES

## NEW ON-SITE SERVICES



# SWEDISH MARKET OFFERS OPPORTUNITIES IN EXPANDING ON-SITE SERVICES AND INDUSTRIAL MATERIAL CHAIN

2022 → 2023 → Long-term



Sources: L&T management, Statistics Sweden, The Swedish Environmental Protection Agency, Allabolag



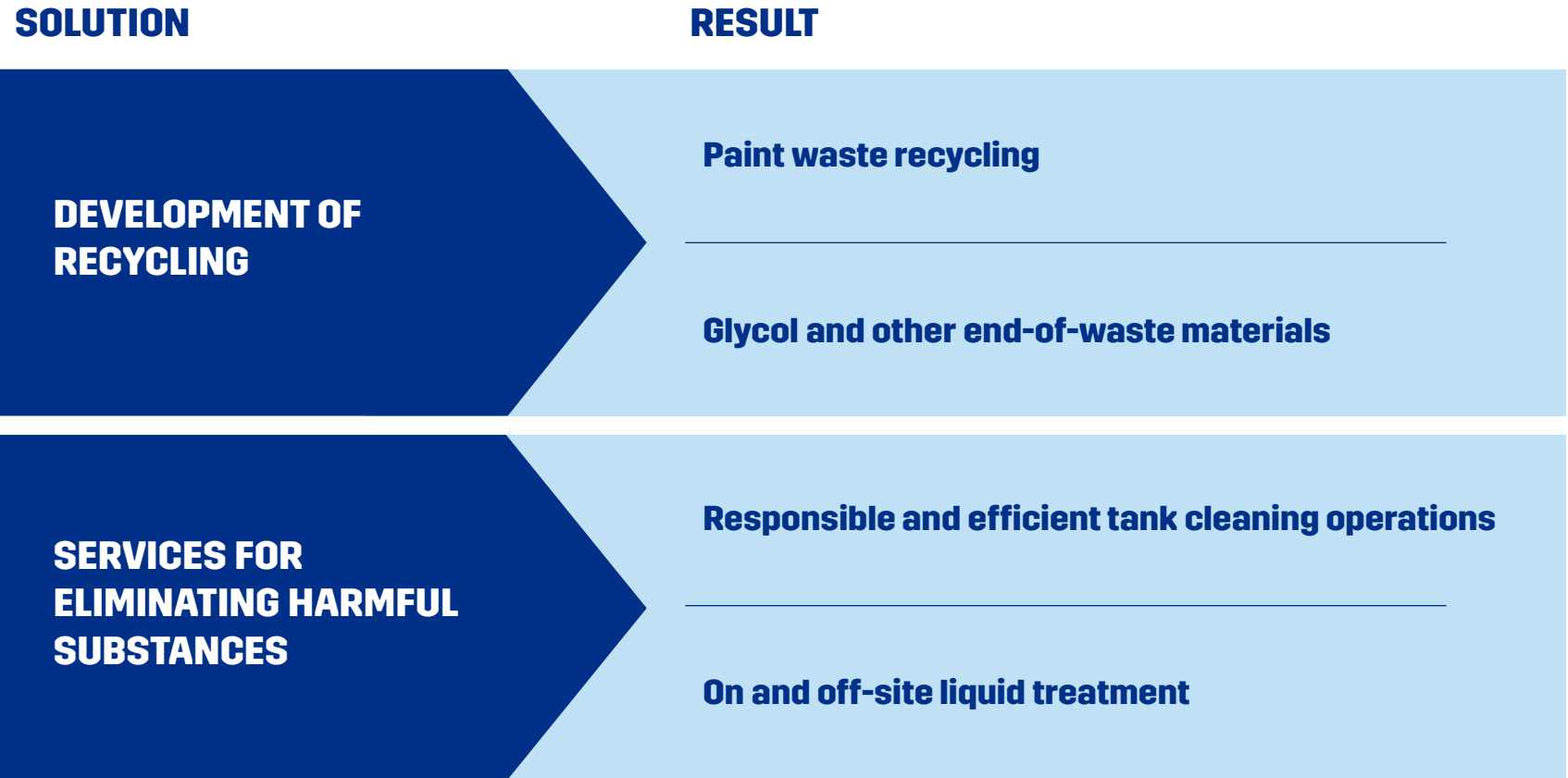


# INCREASING THE MATERIAL VALUE OF DIFFERENT WASTE AND SIDE STREAMS

# GROWTH AND COMPETITIVE ADVANTAGE FROM RECYCLING SOLUTIONS IN HAZARDOUS WASTE

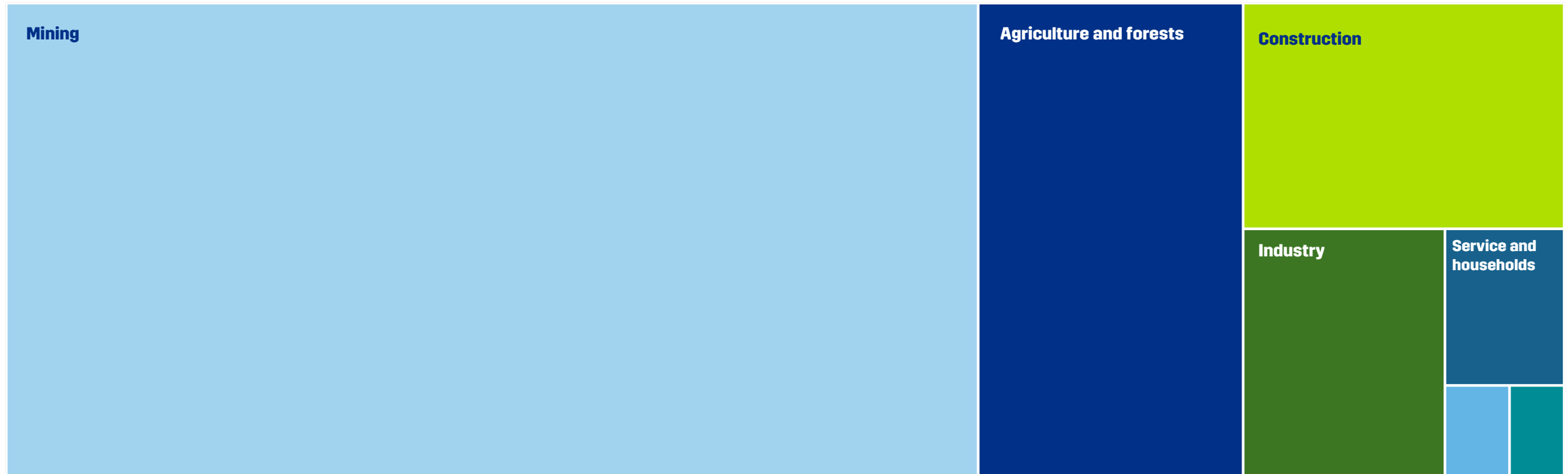
L&T'S CUSTOMERS' HAZARDOUS WASTE RECYCLING RATE IN 2022

**70.3%**



# AMBITIOUS CLIMATE TARGETS ALSO SHIFT FOCUS TO INDUSTRIAL, MINING AND CONSTRUCTION STREAMS

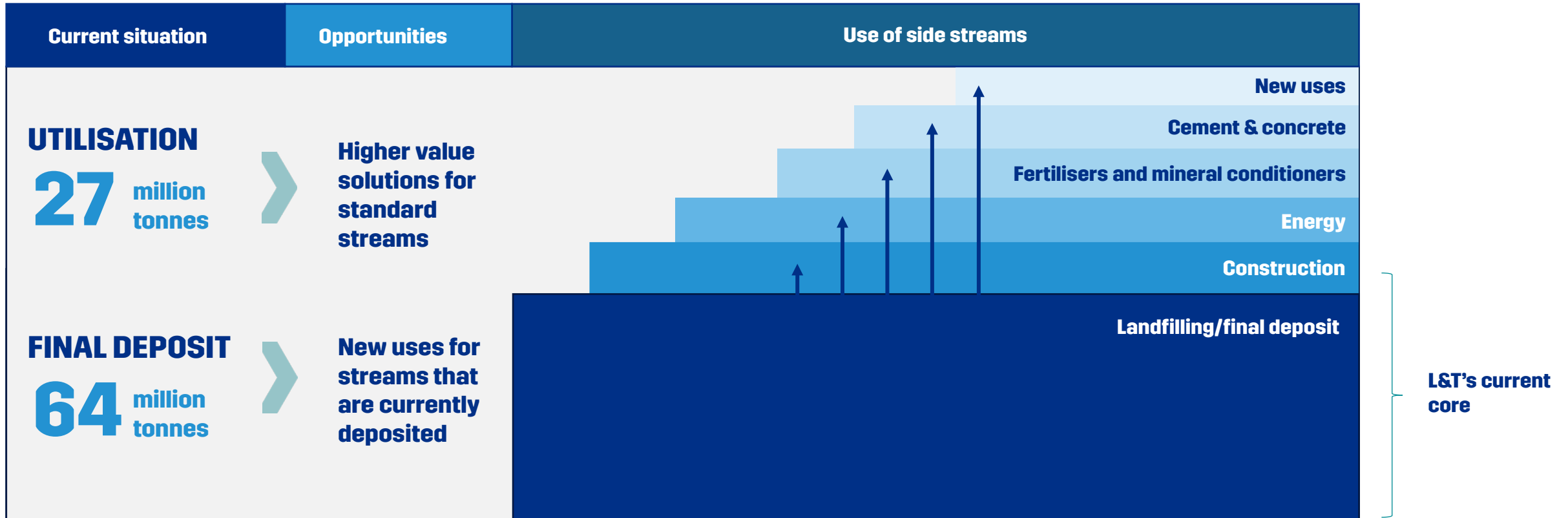
## WASTE AND SIDE STREAM VOLUME (TONNES) IN FINLAND



Sources: Statistics Finland, L&T management



# BUILDING ON EXISTING STRENGTHS AND COMPETENCIES TO UNLOCK NEW OPPORTUNITIES TO REUSE AND CREATE VALUE-ADDED WITH SIDE STREAMS



Sources: YLVA and Ministry of the Environment, L&T management





# EXTENSIVE REMEDIATION SOLUTIONS AND TREATMENT FOR INDUSTRIAL SIDE STREAMS

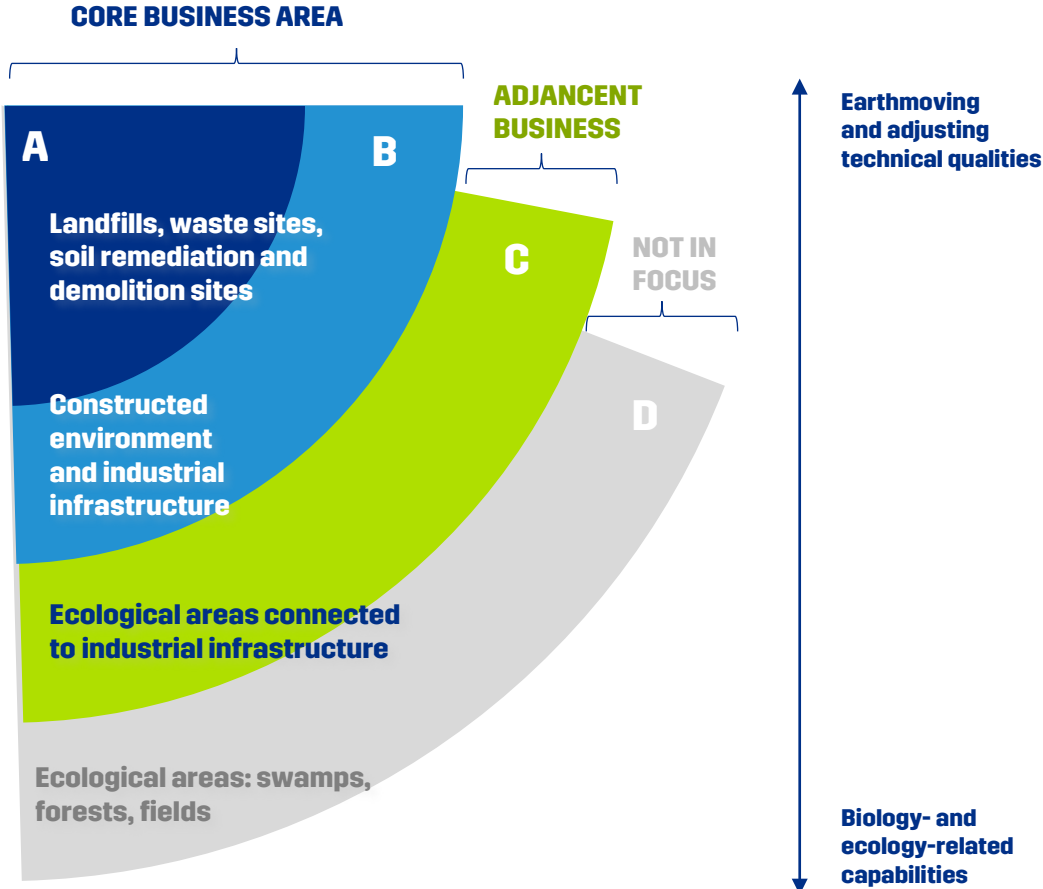


# L&T'S CURRENT SERVICES ARE MITIGATING BIODIVERSITY LOSS

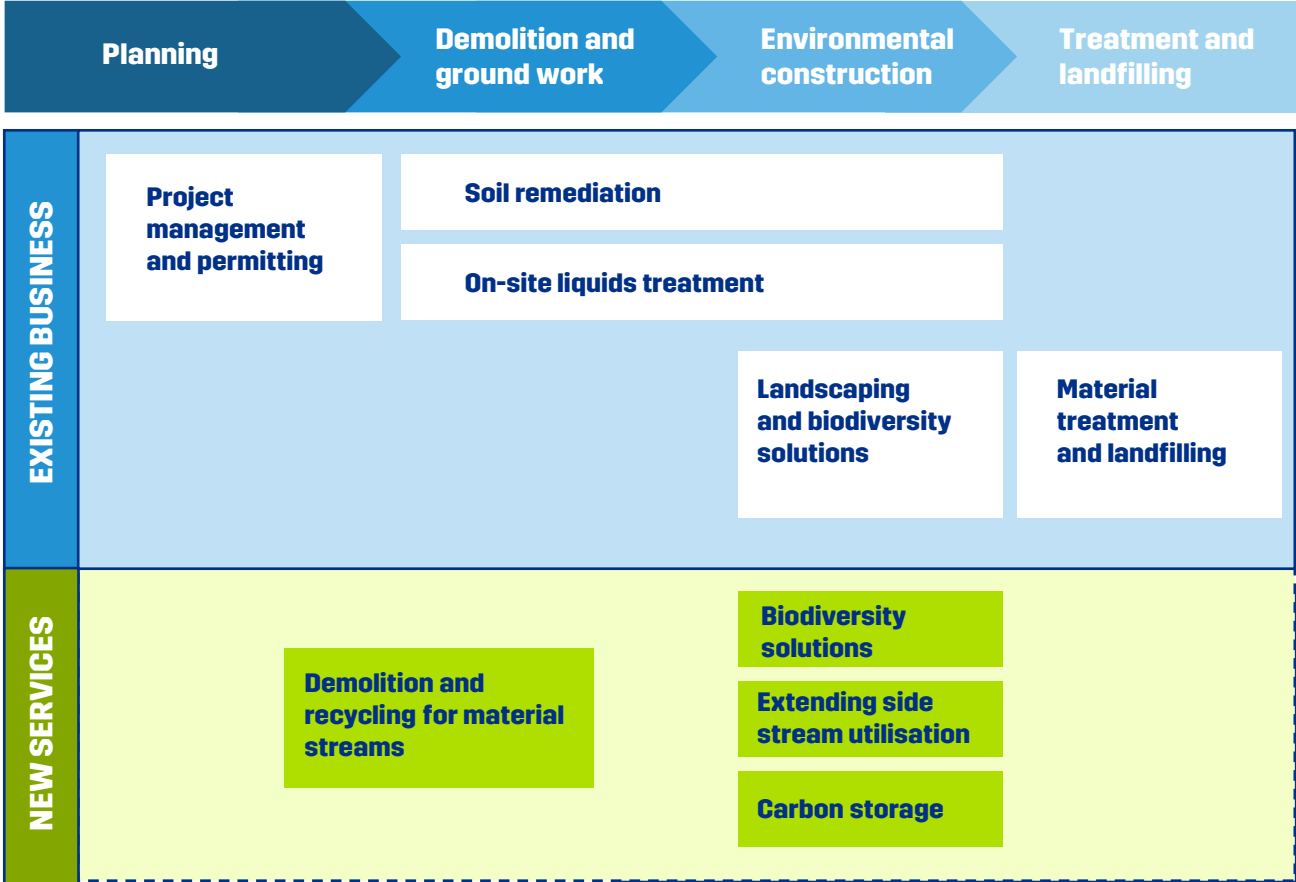
## REMEDIATION BUSINESS



# ENVIRONMENTAL CONSTRUCTION OFFERS OPPORTUNITIES IN MORE COMPREHENSIVE SOIL REMEDIATION AND TREATMENT



## Remediation value chain



# SUMMARY

**Growth from several new sections of the industrial value chain and increasing the value-added**

**A strong foothold in being customers' reliable service partner both in Finland and in Sweden**

**Increasing the material value of different industrial waste and side streams**

**Extensive remediation solutions and treatment for industrial side streams**



**THANK YOU**



