### **BETOLAR** We enable CO<sub>2</sub> emission reductions and lower the use of virgin raw materials

#### KEY DRIVERS



- Increasing regulation, green innovation and change in customer behavior and values
- More focus on decarbonization across various sectors, including construction, infrastructure and mining



- Growing demand for solutions that address waste and pollution
- Waste and other by-products will increasingly be used as building materials instead of virgin raw materials, as industry is shifting to green building



- Growing migration to urban areas drives growth in construction and increases demand for cement
- As result of repairing or replacing aging infrastructure, cement is increasingly applied in infrastructure projects



- Increasing geopolitical risks, deglobalization affecting industrial supply chains and growing emphasis on supply security
- Future material solutions in Betolar's target industries are increasingly based on local side streams

#### MISSION AND VISION



#### **VALUES**



#### Courage

- Determination to proceed and being innovative
- Open mind for opportunities, colleagues and partners



## Commitment to responsibility

- Respecting the environment and humanity
- Actions worthy of trust



Prerequisites for working together

- Mutual respect
- Friendly behavior
- Security



# Betolar accelerates development and commercialization of alternative side streams – Taking a position in side-stream value chain enables better value creation potential



- Invest in advanced material testing to assess potential of new side streams
- Accelerate development of alternative low-cost side streams to maximize value creation and answer increasing global demand for green building solutions
- Supply of known side streams is decreasing and GGBFS\* has become highly priced raw material in many locations

- Seek stronger position in the side-stream value chain by partnerships or investments
- Build business around sidestream utilization for example by entering to further processing, warehousing and distribution
- Create stronger position and better value creation potential

 There are emerging supply chain and circular business model opportunities

- Accelerate solution development to large-volume and scalable customer segments
- Betolar solutions target next construction and mining industries with larger scaling potential, for example in hollowcore slab and mining paste backfill projects

- Betolar has strong experience from precast products, where our solutions have worked well
- In mining industry, pressure for green solutions is significant

- Focus sales and marketing in selected key markets by finding best match for green demand, side stream availability, and application fit
- Continuously evaluate and prioritize geographical markets to determine best fit for go-tomarket strategies
- Start new trials in e.g. NAM and MEA\*\* based on local side stream availability
- Demand for green transition varies across the globe, and product requirements and side stream availability also differ based on location

- Create data-based business ecosystem where Betolar Al platform's role is central
- Accelerate recipe and customer application development through systematic data collection and use of AI in R&D processes
- Bring ecosystem partners together to scale green transition and create data-based platform services in the Al platform
- Tailored alkali-activated material development with traditional methods is time consuming

<sup>\*</sup> Ground Granulated Blast Furnace Slag

<sup>\*\*</sup> North American Region / Middle East and Africa Photos: Unsplash, Betolar