PPC DE HOEK
INVESTOR SITE VISIT
05 February 2016

Darryll Castle – CEO
Johan Claassen – MD Cement RSA
Rob Rein – Executive Sales and Marketing
Johan Vorster – GM: De Hoek
About the Western Cape

New PPC Strategy

Profit Improvement Programme

Innovation

About the De Hoek factory

**BULK CEMENT SOLUTIONS**

- Cost Effective
- Efficient Deliveries
- Locally Produced

**NOW THAT IS STRENGTH BEYOND THE BAG**

TEL: 0800 CEMENT / 0800 236 368
About the

WESTERN CAPE
About the Western Cape

- The Western Cape (WC) is one of South Africa’s (SA) most beautiful provinces, attracting the lion's share of foreign tourists.
- It is a region of majestic mountains, colourful patchworks of farmland set in lovely valleys, long beaches and, further inland, the wide-open landscape of the semi desert Karoo.
- Two oceans meet on the coast of the Western Cape: the cold Atlantic Ocean is in the west, while the warmer Indian Ocean lies on the southern coast.
- The plankton-rich cold Benguela current flows along the west coast and is considered to be one of the world’s richest fishing grounds.
- Centuries of trade and immigration have created a population with genetic and linguistic links to different parts of Europe, southeast Asia, India and Africa.

The Western Cape is topographically and climatically varied:

- It has a temperate southern coastline fringed with mountains; here the typical vegetation is the famed fynbos.
- The Mediterranean climate of the peninsula and the mountainous region beyond it is ideal for grape cultivation.
- The southern coastal area is also fertile, while fishing is the most important industry along the west coast.
- Sheep farming is the mainstay of the Karoo, and other forms of husbandry take place in the better watered parts of the province.
- Saldanha, north of Cape Town, is South Africa's only natural harbour, and notable harbour for iron exports and the fishing industry.

Source: South Africa Info
About the Western Cape

- With a total area of 129,462 square kilometres, the WC is roughly the size of Greece.
- It is SA’s fourth-largest province, taking up 10.6% of the country’s land area and with a population of 6 million people.
- The region’s top exports include grape wines, grapes, citrus fruit, apples and pears.
- Tourism is one of the most significant contributors to employment and GDP in the WC.
- The WC’s narrow unemployment rate stands at 20.5%; lower than the national rate of 25.5%.
- The WC has the highest % of households with access to running water, sanitation and weekly refuse removal compared with other provinces.
- Life expectancy in the WC is between 64 – 66 years relative to SA’s 60 – 61 years.

Economic growth in the WC province generally tends to outperform the growth performance of the South African economy.

Over the period 2003 – 2013, SA’s growth rate averaged 3.1% while that of the WC and Gauteng registered the joint fastest growth rates at 3.7%.

Over the period 2003 – 2013, the construction sector was the top contributor to the WC economy.

The construction sector grew at a robust 6.4% over the same period.

Source: Provincial economic review & outlook, 2015
In recent times, business confidence in SA has been on a downward trajectory.

Business confidence in the WC has however exceeded the national index since March 2013.

The construction sector is expected to be the top performing sector during the period 2015 – 2020.

The residential building market coupled with capital expenditure by the public sector is expected to support this sector.

Source: Provincial economic review & outlook, 2015, Bureau for Economic Research

Table 2.4 Western Cape economic outlook\(^\text{15}\), 2015 to 2016 (%)

<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>Agriculture, forestry and fishing</td>
<td>0.9</td>
<td>4.8</td>
<td>1.8</td>
<td>2.0</td>
<td>2.3</td>
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<tr>
<td>Mining and quarrying</td>
<td>2.8</td>
<td>-1.0</td>
<td>2.1</td>
<td>1.8</td>
<td>2.0</td>
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<tr>
<td>Manufacturing</td>
<td>0.6</td>
<td>0.4</td>
<td>0.9</td>
<td>2.0</td>
<td>2.2</td>
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<tr>
<td>Electricity, gas and water</td>
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<td>-1.8</td>
<td>-0.7</td>
<td>1.9</td>
<td>1.8</td>
</tr>
<tr>
<td>Construction</td>
<td>3.0</td>
<td>4.1</td>
<td>2.8</td>
<td>2.2</td>
<td>3.7</td>
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<tr>
<td>Wholesale and retail trade, catering and</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>accommodation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transport, storage and communication</td>
<td>1.7</td>
<td>0.9</td>
<td>2.2</td>
<td>2.1</td>
<td>3.2</td>
</tr>
<tr>
<td>Finance, insurance, real estate and business</td>
<td>3.3</td>
<td>2.3</td>
<td>3.1</td>
<td>2.6</td>
<td>3.4</td>
</tr>
<tr>
<td>services</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Community, social and personal services</td>
<td>1.9</td>
<td>1.3</td>
<td>0.9</td>
<td>1.2</td>
<td>1.7</td>
</tr>
<tr>
<td>General government</td>
<td>4.3</td>
<td>2.8</td>
<td>1.0</td>
<td>0.8</td>
<td>1.3</td>
</tr>
<tr>
<td>Regional Gross Domestic Product</td>
<td>2.4</td>
<td>1.8</td>
<td>1.9</td>
<td>2.0</td>
<td>2.7</td>
</tr>
</tbody>
</table>

Source: Bureau of Economic Research/Quantec Research, (e denotes estimate, f denotes forecast) (2015)
About the Western Cape economy

- Strong growth in WC residential building plans passed
  - The change in the number of square metres of residential plans approved is in excess of 20%
- Similarly, non-residential plans passed are on an upward trajectory in the WC, growing in excess of 10%

Bag:bulk split fairly in line with PPC’s national averages

End use split divergent with national averages
- Much higher proportional exposure to concrete product manufacturers and readymix in the WC relative to SA
- Evidence of a more mature cement market in the WC
PPC’s market dynamics

- Large exposure to the cement market in the City of Cape Town (CCT)
  - In line with general population statistics, where CCT has ~4 million inhabitants
  - The West Coast has about a tenth of the CCT population yet exhibits strong cement demand
- Improvements in cement demand have been experienced since the end of Sept 2015

Product portfolio to compliment strategy

- Bulk and bag strategy
- New product strategy and deeper use of analytics starting to bear fruit
- Successfully activating PPC’s inherent brand equity
PPC’s market dynamics

- Following the imposition of interim dumping duties in May 2015, cement imports have declined.
- Significant declines particularly in the KZN region with only quarter on quarter declines experienced in the WC.
- Freight rates from Karachi (Pakistan) to Cape Town have halved in the recent past however the weakening exchange rate has countered this.
- Two ships with imported cement reached South Africa during the period Oct – Dec 2015.
- Since the final imposition of dumping duties in December 2015, no further ships with cement imports have landed in SA.
Cement market dynamics

- For the first time in over five years, the cement industry (producers’) performance has outpaced that of imports on a moving average basis.

- Over R3 billion worth of projects have been awarded in the WC since October 2015.

- Projects related to road work as well as residential building activities dominate.
Introducing PPC Newlands

- Maintaining our premium cement brand status in an increasingly competitive environment requires innovative and cost effective brand promotion efforts.

- Cricket is the second most followed sport in Africa, while PPC Newlands is one of the top 3 cricket stadiums in the world.

- Combining two iconic brands: Newlands stadium (125 years) + PPC (123 years) = A perfect match.

- Cricket games played at PPC Newlands are aired to over 50 million viewers p.a. across Sub-Saharan Africa and numerous other international countries via DSTV.

- This gives PPC increased visibility not only in the Western Cape and South Africa, but the rest of the African continent as well.

- 2015 / 2016 is a bumper season with New Zealand, Australia and England touring SA.
Activating PPC Newlands

- In October 2015, PPC announced its strategic partnership with JP Duminy and his non-profit organisation, the JP21 Project.

- The partnership will see PPC work with the JP21 Project over the next six months to build concrete cricket pitches and practice nets at under-resourced primary schools in Strandfontein and Mitchells Plain.

- JP Duminy will host a sod-turning event on Thursday 18 February, at the first school to receive a concrete cricket pitch in partnership with PPC.

- PPC together with the JP21 Project hosted 100 aspiring cricketers representing 25 schools from Strandfontein and Mitchell’s Plain at the season’s first cricket match at PPC Newlands in October.
About our new STRATEGY
Our new vision

VISION

“To be a world class provider of materials and solutions into the basic services sector, taking a strategic approach to more than doubling our business every 10 years”
Our new strategic aspiration

OUR STRATEGIC ASPIRATION

Exceeding the expectations of all our stakeholders on a sustainable basis

Achieving this strategic aspiration requires fundamentally changing our corporate culture
Our new strategy

1. **WORLD CLASS EXCELLENCE IN ALL THAT WE DO**
   - We will ensure a sustainable competitive advantage by committing to world class standards in all that we do
   - We strive for technical excellence that will manifest itself in a cost leadership philosophy
   - Constantly monitoring global best practices and solutions
   - Constantly measuring and monitoring our business

2. **PROVIDER OF MATERIALS AND SOLUTIONS**
   - In manufacturing cement we have the ingredients and IP to provide products and solutions to a wider clientele without taking the focus off our core cement making business
   - Cement is an intermediate physical product. We have IP and expertise relevant to our customers that differentiate us and enable us to offer solutions
   - Adjacent and transformational businesses related to our inputs, processes and products are important growth vectors to insure against changes in our industry

3. **INNOVATION CULTURE**
   - We recognise that innovation is more than just ideas
   - In order to harness the benefits of innovative ideas we will create an innovation process
   - We will create an innovation culture as the core driver of the business

4. **TAKING A STRATEGIC APPROACH**
   - We will understand the drivers, risks and trends in each of our regions and businesses, especially in the longer term and act accordingly
   - Defensive strategies are as important as offensive strategies

5. **DOUBLING OUR BUSINESS EVERY 10 YEARS**
   - Recognising that Africa presents a unique growth opportunity in our time we will ensure that we at least maintain our Africa market share
   - We will have a deep understanding of the locations, owners and influencers of all relevant inputs, businesses and markets, and will leverage our position in order to maintain and extend our influence
   - Ultimately we will utilise our strength to become a major global cement player growing out of Africa
Our new strategy

BECOMING A MAJOR PLAYER
In Africa then Globally
Cement industry business models

- PPC has a very high exposure to cement revenue relative to other global cement players.
- The contribution of cement revenue to other global players ranges from as low as ~35% to 67%.
- Other cement revenue typically includes aggregates, ready-mix, asphalt etc.

Source: PPC research and estimates
Focus on Africa

- In the next 35 years, Africa will have to accommodate another ~900 million new urban dwellers
- This is equivalent to what USA, Europe and Japan combined have done in the last 265 years
- In 2050, Africa is expected to host nearly a quarter of the global urban population

Source: Mo Ibrahim Foundation
About the
PROFIT IMPROVEMENT PROGRAMME

PPC
Support strategic positioning of the business

Profit Improvement Programme

Deliver solutions for sustainable long term value creation

Deliver short term reliable results

Drive cultural and behavioural change that benefits all stakeholders
Profit improvement programme

1) Revenue optimisation
- Up to R130 million in 3 years
- F2015 Achieved R11 million
- Achieved through improved channel management initiatives

2) Cost efficiencies
- Up to R150 million in 3 years
- F2015 Achieved R150 million
- Achieved through manufacturing and logistics efficiencies

3) Strategic cost reduction
- Up to R120 million in 3 years
- F2015 Achieved R51 million
- Benefits achieved from head office savings and head count management

PIP
- Up to R400m improvement in 3 years
- F2015 Achieved R212 million
- Over half of the three year target has been achieved

What we have already achieved
PIP journey map

**2015 ➔ PHASE 1**

Focus on head office:
& SA cement operations

212 million

**2016 ➔ PHASE 2**

* Expand to all business operations
* PIP awards
THANKS MOM!

**2017 ➔ PHASE 3**

These numbers will be achieved by:
* Revenue enhancement
* Cost reductions
* Efficiencies
Case study - overheads

- RSA cement and corporate overheads were the major contributors to the R51m saving achieved in FY 2015
  - RSA cement and Sales & Marketing
  - Natural attrition and reduction in consultants
  - Optimising marketing budgets
- Corporate overheads
  - Reduction in consultants and temporary positions
  - Improved budgeting and monitoring
  - Optimised internal processes (e.g. SAP travel mgmt. system)
  - Reduction in general discretionary spend (e.g. entertainment)
  - Legal spend streamlined accordingly

### PIP contribution to overheads saving 2015

- RSA Cement: 33%
- Sales & Marketing: 18%
- Corporate overheads: 29%
- Other: 20%
Western Cape Logistics YOY Spend Improvement

Fleet size

Optimal Fleet size

Theoretical Minimum Fleet size

Weekly Volumes

Western Cape Fleet Utilisation

Western Cape Fleet Utilisation

1st Quarter FY15

1st Quarter FY16

60%

80%

Western Cape Fleet Utilisation
About

INNOVATION
#IGNITE...the spark of innovation

Objectives

Support an innovation culture by

- Implementing a system that supports idea management (Innov8)
- Democratising the process (remove barriers to idea implementation)
- Drive growth with real return on investment (ROI)
- Focused challenges to stimulate creative problem solving
- Improve collaboration and inclusiveness
- Find disruptive/breakthrough innovation ideas

KPIs

<table>
<thead>
<tr>
<th>Measurement instrument</th>
<th>Metric</th>
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<tbody>
<tr>
<td>Financial</td>
<td>ROI</td>
</tr>
<tr>
<td>Growth</td>
<td>50% of new business from innovation</td>
</tr>
<tr>
<td>Innovation culture</td>
<td>Innovation success factor (value add through innovation)</td>
</tr>
<tr>
<td>Innovation capability</td>
<td>Leadership participation index – metrics from Inno8 Collaboration index – metrics from Innov8 Implementation success rate (% of implemented ideas)</td>
</tr>
</tbody>
</table>
Innovation as an improvement journey

Opportunities
Challenges
Ideas

Innovation Platforms
(Ideas Management)

Strategy

PURPOSE
Profit (PIP)
Culture (innovative, collaborative ...)
Sustainability
Innovation

- Improving our Current Business (Today)
- Selectively Abandon the Past (Near future)
- Creating our Future Business (Far future)

PROFIT

- Doing things Better
  - Enhance Business Operations
  - Performance Management
  - Leverage current competencies
  - Today’s customers, technologies and competitors

GROWTH

- Doing things Differently
  - Starting to see the same thing in a different way
  - Innovation Culture
    - Grow brand and markets
    - New systems and processes
    - Develop new competencies
    - Harness existing technology in novel ways
    - Tomorrow’s customers, technologies and competitors

From incremental improvement to disruptive innovation
Innov8 idea management

- 9 focused challenges
- 438 ideas submitted
- 35% users activated
- Improved collaboration
- 6 ideas selected for implementation

IDEAS SUBMITTED

- REVIEW STAGE 1
- 436 ideas

- IDEAS IN DEVELOPMENT
- REVIEW STAGE 2
- 379 ideas
  - 95 ideas
- 20 ideas

- IDEAS SELECTED
- 6 ideas
Innovation case studies

- Regulatory requirements and product portfolio resulted in >60 different paper bag types
- A simple redesign idea was approved by the regulator with the potential to reduce the bag numbers by >50%
- Second stage development could reduce this further

Benefits:
- Financial
- Reduction in management time
- Reduction in inventory value
- Redundancy improvement

Logistics Optimisation

- The trailers historically used for outbound delivery of bagged cement, were redesigned to allow the backhaul transport of bulk raw materials to Slurry
- This innovative idea enabled further logistics optimization for our Slurry factory and led to the development of an emerging transport company
- The raw material transport saving for Slurry has added up to a significant cost reduction of between 30 and 50% for magnetite, gypsum and boiler ash
- The sustainable saving is >R8 million p.a. and we did not have to invest any capital
About the factory

DE HOEK
During 1919 Hermon Piquetberg Lime Company discovered limestone at De Hoek.

In 1923 Cape Portland Cement took over and began production with one kiln.

The company continued to trade under this name until 1983 when the name changed to Pretoria Portland Cement.
The rotary kiln

160 Feet long (49 m)
Diameter of 9 feet (2.7m)
Limestone transported with trolleys to the factory
# PPC De Hoek Management

<table>
<thead>
<tr>
<th>Position</th>
<th>Name</th>
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<tbody>
<tr>
<td>General Manager</td>
<td>Johan Vorster</td>
</tr>
<tr>
<td>Engineering Manager</td>
<td>Steven Strauss</td>
</tr>
<tr>
<td>Production Manager</td>
<td>Michael Daniels</td>
</tr>
<tr>
<td>Mining Manager</td>
<td>Vincent Diergaardt</td>
</tr>
<tr>
<td>Despatch Manager</td>
<td>Rodney Campher</td>
</tr>
<tr>
<td>Quality Assurance Manager</td>
<td>Adéle Stone</td>
</tr>
<tr>
<td>Administration Manager</td>
<td>Johan Steyn</td>
</tr>
<tr>
<td>Human Resources Manager</td>
<td>Jan Vorster</td>
</tr>
<tr>
<td>Environmental &amp; Sustainability Manager</td>
<td>Jaco Joubert</td>
</tr>
<tr>
<td>Risk Manager</td>
<td>Annetjie Minnaar</td>
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</table>

We currently employ 220 people
PPC De Hoek activities

Mining

Vondeling Pit

Zoutkloof Pit

Despatch

Factory

Village
## Mining – materials mined

<table>
<thead>
<tr>
<th>MATERIAL</th>
<th>ANNUAL TONNAGES</th>
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<tbody>
<tr>
<td>Limestone</td>
<td>1,000,000 – 2,000,000</td>
</tr>
<tr>
<td>Over burden</td>
<td>2,500,000 – 4,500,000</td>
</tr>
<tr>
<td>Shale</td>
<td>24,000 – 48,000</td>
</tr>
</tbody>
</table>

*Annual tonnages are related to demand*
Mining – old De Hoek quarry

- No longer in operation since 1980
Mining – Zoutkloof pit

- Commenced during 1979/80
- Planned mining until 2016
- Current depth is 180m
- Final depth will be 188m
Mining – Vondeling pit

- Commenced during 2003
- Planned mining until 2042
- Current depth is 50m
- Final depth will be 200m

- Commenced during 2007
- Planned mining until 2042
- Current depth is 60m
- Final depth will be 200m
Mining – primary crusher

- Semi-mobile Primary Crusher (Cone)
- Move once in 3-4 years for maintenance
- Takes 1 day to travel to the service area
- 2 x Secondary crushers (Impact)
- Transportation via a 4 km belt conveyor underneath the N7 to the plant
Mining - rehabilitation

- Backfilling Zoutkloof pit
- End use for mining area is agricultural activities
## Mining equipment

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<tr>
<th>Equipment</th>
<th>Type</th>
<th>Quantity</th>
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<tr>
<td>Haul truck</td>
<td>Cat 773 (50t)</td>
<td>7</td>
</tr>
<tr>
<td>Loader</td>
<td>Cat 990</td>
<td>2</td>
</tr>
<tr>
<td>Excavator</td>
<td>Cat 385</td>
<td>1</td>
</tr>
<tr>
<td>Dozer</td>
<td>Cat D9T &amp; D9N</td>
<td>2</td>
</tr>
<tr>
<td>Grader</td>
<td>Cat 14G</td>
<td>1</td>
</tr>
<tr>
<td>Drill</td>
<td>Atlas Copco</td>
<td>1</td>
</tr>
<tr>
<td>Water Truck</td>
<td>Astra (32 000 liter)</td>
<td>1</td>
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</tbody>
</table>
Production process

1. Limestone mining
2. Crushing plant
3. Kiln feed preparation and blending
4. Coal stockpile
5. Raw mill
6. Pre-heater, kiln line & cooler
7. Coal mill
8. Clinker storage
9. Finish milling & dispatch

Tyres
Production – reclaiming of materials

Raw materials

Mined on site
- 90% Limestone
- 3.5% Shale

External Supply
- 4% Sand
- 6-10t/hr Coal
- 2.5% FDG (Fe)

Product extender
- 9 - 37% Slag
- 3% Gypsum
# Production – raw milling

<table>
<thead>
<tr>
<th>Raw mill 5</th>
<th>Raw mill 6</th>
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<tbody>
<tr>
<td>Ball mill</td>
<td>Ball mill</td>
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<tr>
<td>Capacity of 95 t/h</td>
<td>Capacity of 117 t/h</td>
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</table>
DK5
- 1150 t/d
- 4 stage preheater

DK6 (OLD)
- 1450 t/d
- 4 stage preheater

Clinker storage capacity is 55000 tons
DK6 upgrade: 2011 - 2012

Coal plant upgrade:
Indirect firing system
Coal mill
Bag filter

R280 Million Upgrade Project!!

ESP
IKN Cooler
Bag House
DK6 (New)
- 1650 tpd
- 4 stage preheater
- Grate cooler
- Bag filter
- Indirect firing system
Environmental compliance upgrade

2014
- Kiln 6 Filter replacement: R55m

2015
- Tyre feed: R10m

2016
- Maag Gearbox replacement: R19m
- System Filter replacement: R 9m
- Separator Filter replacement: R 4m
- Replacement of dust collectors at transfer points: R 3m
De Hoek tyre feed project

- De Hoek kiln 6 is expected to have a co-processing capacity of approximately 8 000 tons of recycled tyres per year, resulting in a heat replacement of 15%
- REDISA# aims to supply 8000 tons of tyres to PPC, with 6000 tons coming from the Western Cape tyre availability
- The manual feed system was completed at a cost of under R10 million

#REDISA is the Recycling and Economic Development Initiative of South Africa

Installation of double flap airlock valve

Alimak tyre feed lift

SEE PPC WEBSITE FOR TYRE BURNING VIDEO CLIP
De Hoek tyre feed project

- Manual feed system operational mid August 2015
  - Initial 1 tyre per minute feed = 5% coal replacement
  - Personnel required: 26 tyre feeders, 4 Bell truck operators to feed 24/7

Bell truck operators offloading tyres for feeding
Production – finishing mills

**FM 5 & FM 6**

- Horizontal ball mills
- Output from 45 to 85 t/h depending on product
- Over 1.1 million tons of cement can be produced per annum
Packaging and logistics
Packaging and logistics

- Two packing machines 2,900 bags p/h each
- Bulk loading facilities by road and rail
- Cement storage capacity = 20,000 tons
- We can pack in excess of 1.4 million bags of cement per month
- De Hoek can sell approximately 26,000 tons of cement per week

**Product Despatch**
- Surebuild bags – road and rail
- Surebuild bulk – road and rail
- OPC bulk and bag – road only
- Sureroad bags
- 32.5MPa house brand bags
DE HOEK CEMENT PRODUCTS

<table>
<thead>
<tr>
<th>Brand Name</th>
<th>Strength Class</th>
<th>SABS Permit</th>
<th>NRCS</th>
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<tbody>
<tr>
<td>Surebuild</td>
<td>CEM III/A 42,5N</td>
<td>Yes</td>
<td>LOA</td>
</tr>
<tr>
<td>OPC</td>
<td>CEM II/A-L 52.5N</td>
<td>Yes</td>
<td>LOA</td>
</tr>
<tr>
<td>Sureroad House brand</td>
<td>CEM II/B-M(L-S) 32.5N</td>
<td>Yes</td>
<td>LOA  Not PPC</td>
</tr>
</tbody>
</table>

The final products have to conform to the EN 197-1 specification

NRCS National Regulator for Compulsory Specifications

LOA Letter of Authority
Facilities

Village
- 75 houses
- First house built in 1921

Golf club
Established in 1922

Recreational club
Integrated SHEQ management system

- Quality Management System
- Environmental Management System
- Health & Safety Management System
- Bag mass e-mark
- Energy Management System
- HIV/AIDS Management system

We are certified in the following standards

- ISO 9001
- ISO 14001
- OHSAS 18001
- SANS 1841
PPC De Hoek CSI & SLP activities

Wittewater Water project - phase 1 & 2

Charl Schreve – Ablution facilities

Steynville Primary Grade R Classrooms (5)
De Hoek Innovation Challenge

Case study:

- FM5 and FM6 optimisation and productivity improvement 1st phase complete
- Installation of conveying systems from the FM5 mill to the FM6 separator
- De-risks plant operations, improves capacity and allows for better power planning to reduce electricity costs
Questions?
Disclaimer

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