

A NEW LINE OF SIGHT

AUSTRALIAN
GOVERNANCE
SUMMIT 2020

2 & 3 MARCH
ICC SYDNEY
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Sims Purpose

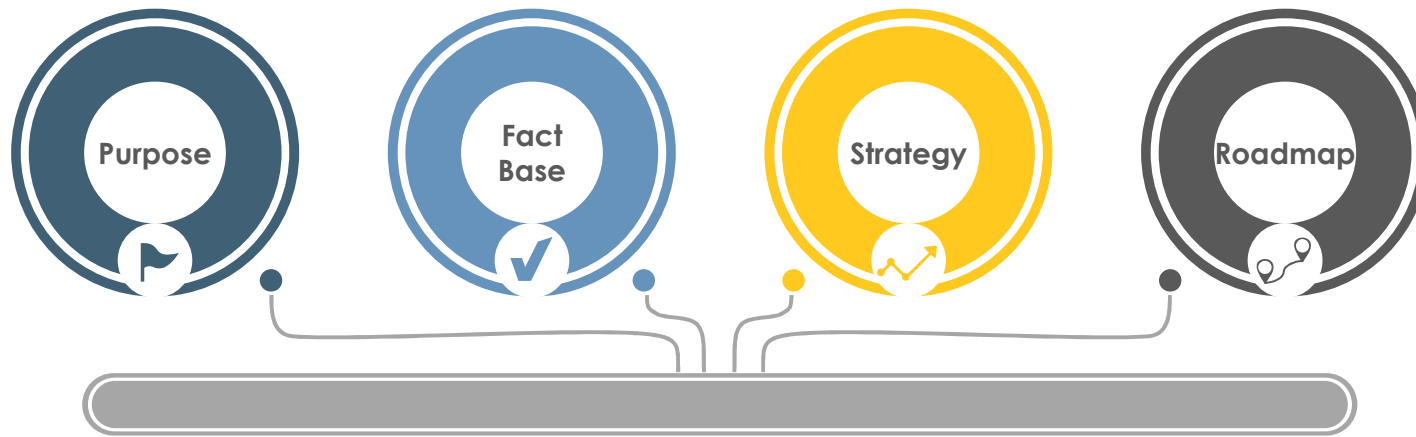
Create a world without waste to preserve our planet

Geoff Brunsdon (AM)
3 March 2019



Strategic Process

Strong board and employee engagement



Sims Purpose

Create a world without waste to preserve our planet



We will build enterprises that:

- Create long-term value by providing secure and sustainable management of resources within the circular economy



When we embrace our purpose, we will:

- Become a leading innovator in the circular economy
- Be recognised around the world as a responsible community partner
- Become an employer of choice in the environmental sector
- Be the #1 or #2 player in the sectors in which we compete








Our strategy combined with our Purpose will:

- Provide safer working sites
- Reduce earnings volatility
- Reduce operational risk
- Counter threats to our core business



Fact Base: 30 year megatrends

An example of the analysis undertaken

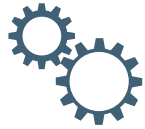
Area	Category	Megatrends	Impact to Sims
	Climate Change	Natural disasters are more frequent and violent driven by rising CO ₂ emissions	Increased push towards recycled materials to reduce carbon emissions
 Social	Waste	Global waste will increase	Higher landfill costs and need for solutions
		Advanced materials will change the nature and composition of goods	Increasing value of materials in waste streams and higher importance on separation
		Nuclear reactor decommissioning will generate radioactive waste to be handled	Need for development of economic solutions
		Trade in waste will decline with emphasis placed on management, recycling and reuse	Material separation will occur in the domestic market of material origin
 Environmental	Water	There will be less plastic pollution with the advent of bio plastics	Declining volume of plastic materials for processing (Municipal)
		Increased demand and declining availability of freshwater in megacities	Need for development of economic solutions
		Increased pollution of global oceans	Need for development of economic solutions
 Economic / Business	Energy	Renewables will make up to 50% of the energy capacity growth by 2040	Increased supply of renewables risk cuts to government support from carbon permit sales
		Energy storage & peer-to-peer (P2P) energy trading will revolutionise traditional utilities	Potential for easier sale of and purchase of energy at lower prices
 Technological	Resource Sustainability	Declining availability of low cost & high grade mines across all commodities and minerals	Higher prices across all commodities and improved economics for material recovery
		Landfills mined for resources & energy	Increased opportunities for material recovery
 Political			



Sims Integrated Strategy

Grow core business and leverage synergies to expand into adjacent markets

Sims Group



Sims Metals

Fortify and grow sustainable profits

Globally grow ferrous and non-ferrous business. Including:
Doubling the US non-ferrous business by FY25
Growing the US ferrous business ~40% by FY25



Sims Resource Renewal

Utilise waste to create new revenue stream and reduce costs

Zero waste disposal costs over the long term
Install and operate seven plants within 10 years



Sims Lifecycle Services

Grow product stewardship and services for recycling the cloud

Recycle 200k tonnes of the cloud by FY25
Be the OEM supplier of choice for recycled plastic



Sims Energy

Expand proven business model and technology globally

Acquire or build 50 MW by FY25



Sims Municipal Recycling

Develop recycling solutions for major cities

Secure additional large city contracts by FY25



Road Map and Delivery

Sims has a solid pipeline of capital and non-capital growth opportunities

