


We drive sustainable solutions for our customers

2022 Capital Markets Day – 24 May

Jon Morrish

Member of the Managing Board

An aerial photograph of a modern architectural complex. The buildings are white with a grid-like facade. The central courtyard is lush with greenery, including trees and grass. There are several circular and rectangular courtyards with green roofs. The overall scene is bright and sunny, suggesting a clear day.

Sustainable materials are the future.
We turn this into an opportunity for growth.

Construction markets are now embracing sustainability, and we are leading this change.



There is strong and fast growing demand for sustainable materials

Hot topics in construction

CO₂ targets
Resilience
Recycling
Local vs. global supply
Fire resistance

Increasing government focus on green procurement



EU 'Recovery Fund'

€ 750 bn

for green building until 12/2026
with 'Green Deal' criteria



US 'Buy Clean'

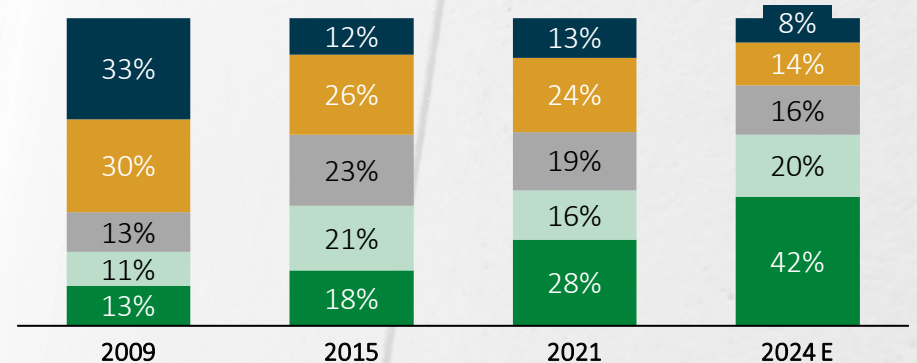
\$650 bn

for green building p.a.

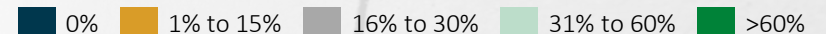
Driving a strong market demand for

Sustainable concrete
Sustainability information and advice

% share of construction professionals focusing on green building activity



% share of green building activity



We are driving the agenda through government policy



Governments



Trade associations



Architects / designers



Developers & customers

- Country general managers engage directly with governments, and lead trade associations.
- Board members engage directly with governments and policy makers.
- HeidelbergCement drives the agenda for regional and global associations.



We are driving the agenda with developers, customers and specifiers



Governments



Trade associations



Architects / designers



Developers & customers

Multi-channel communications: EcoCrete in Germany

Website



Social media



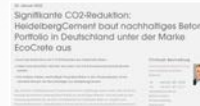
Podcast



Ads in trade journals



Press



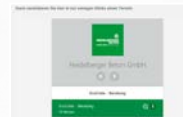
Trade fairs



Trucks



Technical sales



Brochure



Customer

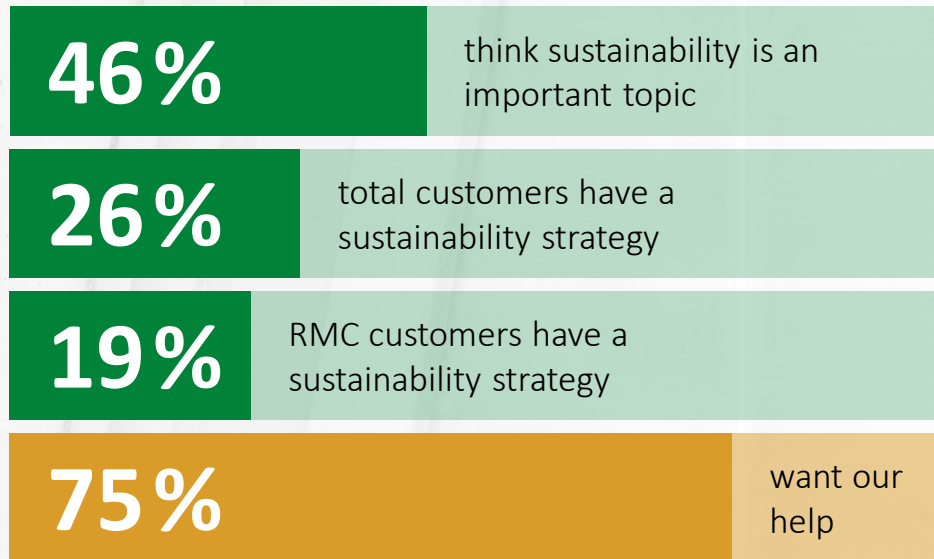


Journal articles

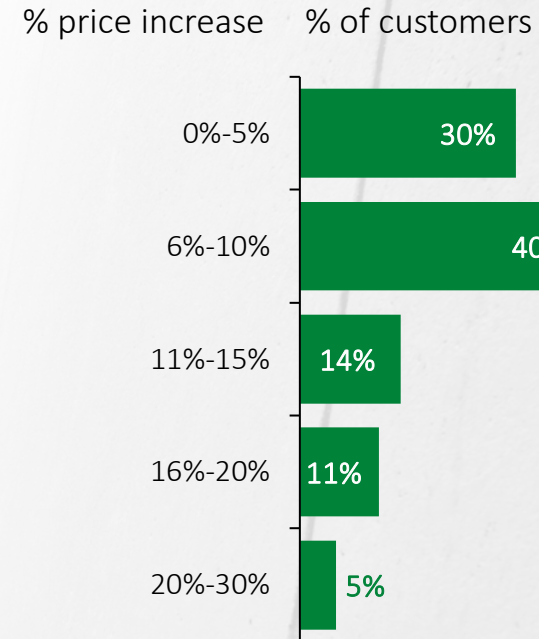


Our customers are embracing this change

They tell us that they need our help ...



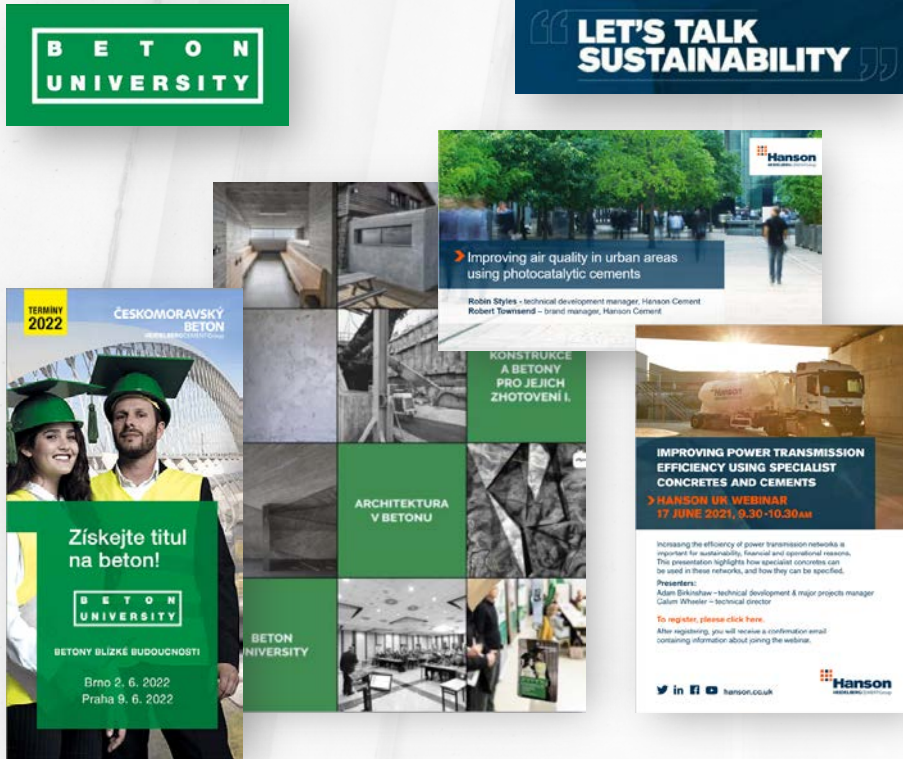
... and are already willing to pay more now



This gives us a great opportunity to deliver genuine sustainable value for our customers.



Our sustainability academies – a rapidly expanding success story around the globe



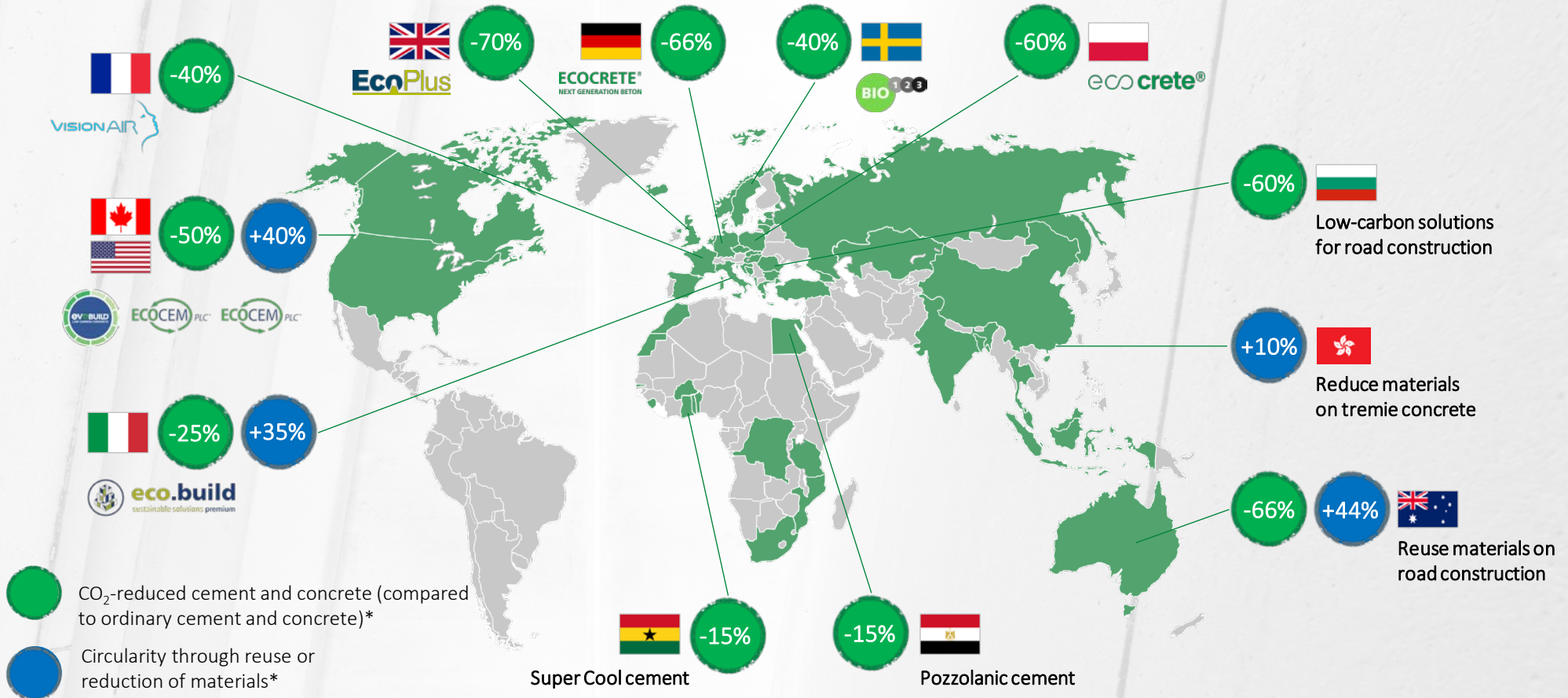
> 2,000 customers educated
in the UK, Czechia, and many other countries

Architects, governments,
developers, customers

Information and education
products, applications, production processes, CCUS

Topical debates with thought leaders
architecture, sustainable construction, recycled materials

Customers benefit globally from our sustainable products and solutions



Many strong examples providing local, sustainable products

Cement



EcoCem substitutes clinker with sustainable alternatives while not compromising on functional attributes.



-50%

CO₂ reduction



Eco.build cement contains >35% recycled materials.



-25%

CO₂ reduction



EcoCrete provides a progressive sustainable product that is 100% recyclable and contains 100% local materials.



-60%

CO₂ reduction



Ecotera substitutes clinker up to 70% while maintaining or improving functional attributes.



-66%

CO₂ reduction

We will drive sustainable revenue to >50 % by 2030



Seattle, USA

Tech giants and urban revitalisation developers are setting carbon targets and need carbon transparency and solutions from their suppliers.

Our concrete sustainability experts were able to provide tailor made solutions to fully align with their sustainability approach, using locally supplied low carbon and recycled materials.

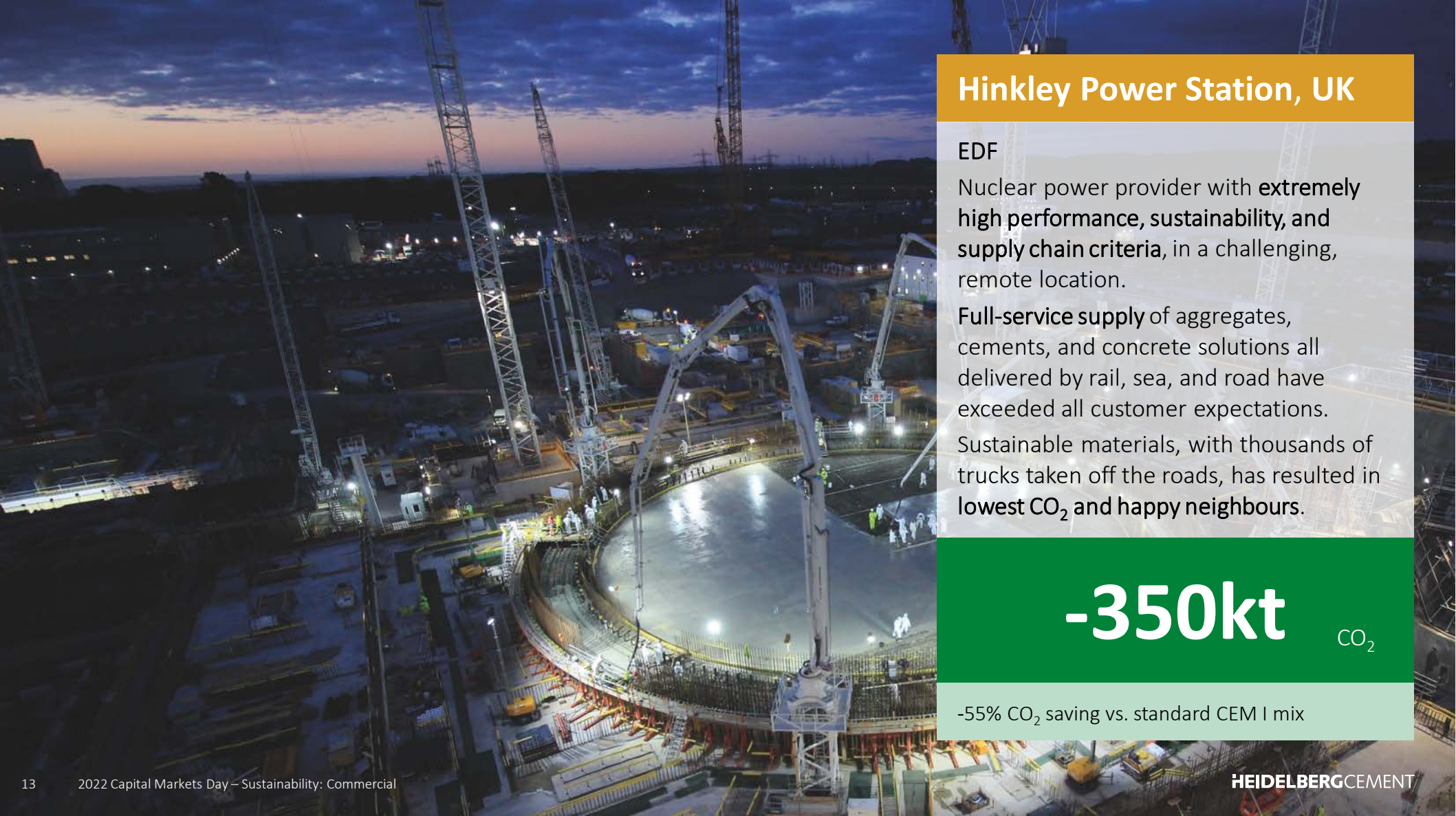
-60 kt

CO₂

120 kt

Recycled aggregates

Equivalent to taking 12,850 vehicles off the road



Hinkley Power Station, UK

EDF

Nuclear power provider with **extremely high performance, sustainability, and supply chain criteria**, in a challenging, remote location.

Full-service supply of aggregates, cements, and concrete solutions all delivered by rail, sea, and road have exceeded all customer expectations.

Sustainable materials, with thousands of trucks taken off the roads, has resulted in **lowest CO₂ and happy neighbours**.

-350kt CO₂

-55% CO₂ saving vs. standard CEM I mix

A photograph of a construction site at sunset. Two workers in high-visibility gear are silhouetted against the bright sun. The ground is covered with a grid of rebar for a concrete slab. In the background, there are construction structures and trees.

Solna, Sweden

NCC AB

A major building contractor whose **business strategy** is built around its commitment to achieve a **50% reduction in CO₂ emissions**.

Our close collaboration, centred around the use of our BIO sustainable concrete range, has established a very productive working partnership.

-1.5kt CO₂ in 2022

> -10% CO₂ saving vs. standard mix

Melbourne, Australia

The greenest freeway

9km of freeway was completed in 4 weeks, significantly ahead of schedule.

The collaboration of **Hanson brands as a joint bidder** allowed for the cocreation of innovative customer solutions, including the scalable use of recycled materials and other sustainable products.

250kt

of recyclables used for road base & asphalt

This enables us to reach our sustainability targets and improve our margins.



We are achieving higher margins for our sustainable products

RMC EBITDA margin improvement¹



An aerial view of a circular garden with a grid pattern. The garden is filled with green foliage, and a person's hand is visible reaching towards the plants. The background is a light gray grid pattern.

1.

Construction markets are now embracing sustainability, and we are leading this change.

2.

This gives us a great opportunity to deliver genuine sustainable value for our customers.

3.

This enables us to reach our sustainability targets and improve our margins.



We are HeidelbergCement.
Sustainable materials to build our future.