



Investor Day

Perth- Australia

1st December 2015

Greg Kilmister – ALS overview

Raj Naran – Life Sciences

Kristen Walsh - Industrial

Brian Williams - Minerals



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Company Profile



ALS Limited (ASX:ALQ) is an ASX 100 company that provides professional technical services to the global Mineral and Energy Resources (exploration, extraction, processing and trading), Life Sciences (environmental, food and pharmaceutical), and Industrial sectors throughout the world.

- +11,000 employees
- +400 sites
- +70 countries
- AU\$1.4 billion revenue
- 504 million¹ shares (96% free float)



¹ Post the 5 for 21 Accelerated Non-Renounceable Rights Entitlement Offer

Compliance and Sustainability



- Core values of “Safety as a Priority” and “Honesty and Integrity” supported by long term compliance program.
- Strong internal controls maintained by compliance portal which incorporates company policies, management sign-offs, environmental monitoring programs, training packages, incident databases, and performance tracking.
- Corporate Social Responsibility program tracks environmental performance, ensures efficient use of resources such as energy, encourages environmental initiatives including recycling programs, and promotes positive interaction with local communities.
- ALS continued its involvement in community and charity work with major recipients including the Red Cross, Unicef, the Salvation Army, and various hospital and cancer foundations.

ALS Limited - Compliance Portal

Home Minerals Life Sciences Energy Industrial Compliance Finance HR Marketing

Home
Blood Lead Control Centre
Compliance Admin Centre
ChemWatch
How We Do Things
Meet the Team
Statistical Reviews
Strategy Planning
Strategy Planning folder
Insurance
B2B Projects
Injury Management
Legal & Standards

Foundation Standard - 13 Goals
(See "Policy" link for alternative language versions)

GLOBAL HSE ALERTS

Travelling for Work?
Dynamiq
Trusted Emergency Management

Submit Incident Report Form
Search Incidents and Issues
Compliance Charts
- PPI Scorecard
- Incident Frequency etc

Compliance Profile Dashboard
Related Party Transactions
Gift Register

Ambient Air Dust Monitoring Results

Click on the symbol to view results from each site - Results will appear on the right.
Click on the button to enter results to the Ambient Air Dust Monitoring Library.

Contact Compliance Portal for help

Site	Responsible Person
Geochimistry - Adria Abitia	Paul Tinsley
Geochimistry - Adelaide	Jason McCusker
Geochimistry - Antipalaga (Post)	Patrick Acosta
Geochimistry - Australia	Karen Karapinar
Geochimistry - Barroila	Jeff Guernsey
Geochimistry - Bolivia	Julio Bana
Geochimistry - Bor	Milica Botovic
Geochimistry - Brisbane Prep (Original)	Graham Ellis
Geochimistry - Bruma	Bruma Platform

Dust Monitoring Procedures

new document or drag files here

☒ Name Modified Modified By
Ambient Air Monitoring - ALS-HSE-GL-ADN-PRD-001 - Final 10 February 2014 Santa Chien

Site Dust Maps

new document or drag files here

☒ Name Modified Modified By
Adelaide Ambient Dust Monitoring 09 April 2014 Matt Pomeroy

Ambient Air Dust Monitoring Library

new item

Site	Sample ID Title	g/m2	Pb ppm	Date Result Taken	Incident ID Number	Nominated Data Entry Person	Result Notes
* Site: Geochimistry - Adelaide (14)	AD 1	0.01	135	31/03/2015		Emma O'Hara	
	AD 1	0.02	291	28/02/2015		Emma O'Hara	
	AD 1	0.12	4	31/01/2015		Emma O'Hara	
	AD 1	0.02	0	31/01/2015		Emma O'Hara	

Ambient Air Monitoring Chart

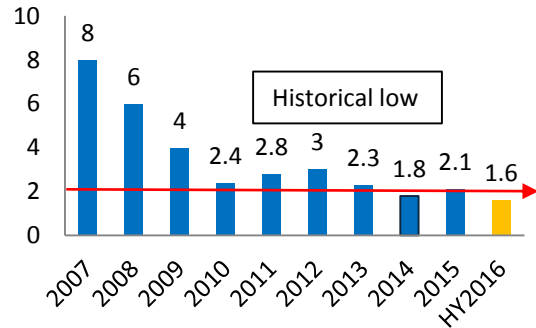


Health Safety and Environment



Performance at a glance:

Lost Time Injury Frequency Rate



ALS Group LTIFR

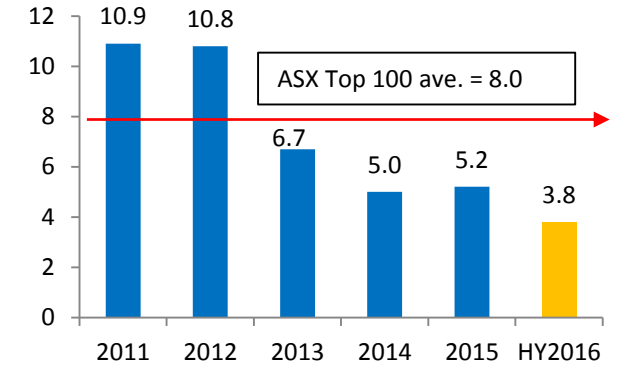
- Lowest LTIFR ever achieved for the Group.
- Reduction in LTIFR accomplished across all Divisions.

Total Recordable Incident Frequency Rate

ALS Group TRIFR

- Half the ASX top 100 average. *
- 65% reduction over last 5 years.

*Per Citi Research "Safety Spotlight: ASX Companies & More" July 2015.



Financial Year: April 2015 – September 2015
Total Score: 85.24%

PPI Scorecard on track to achieve > 90% target.

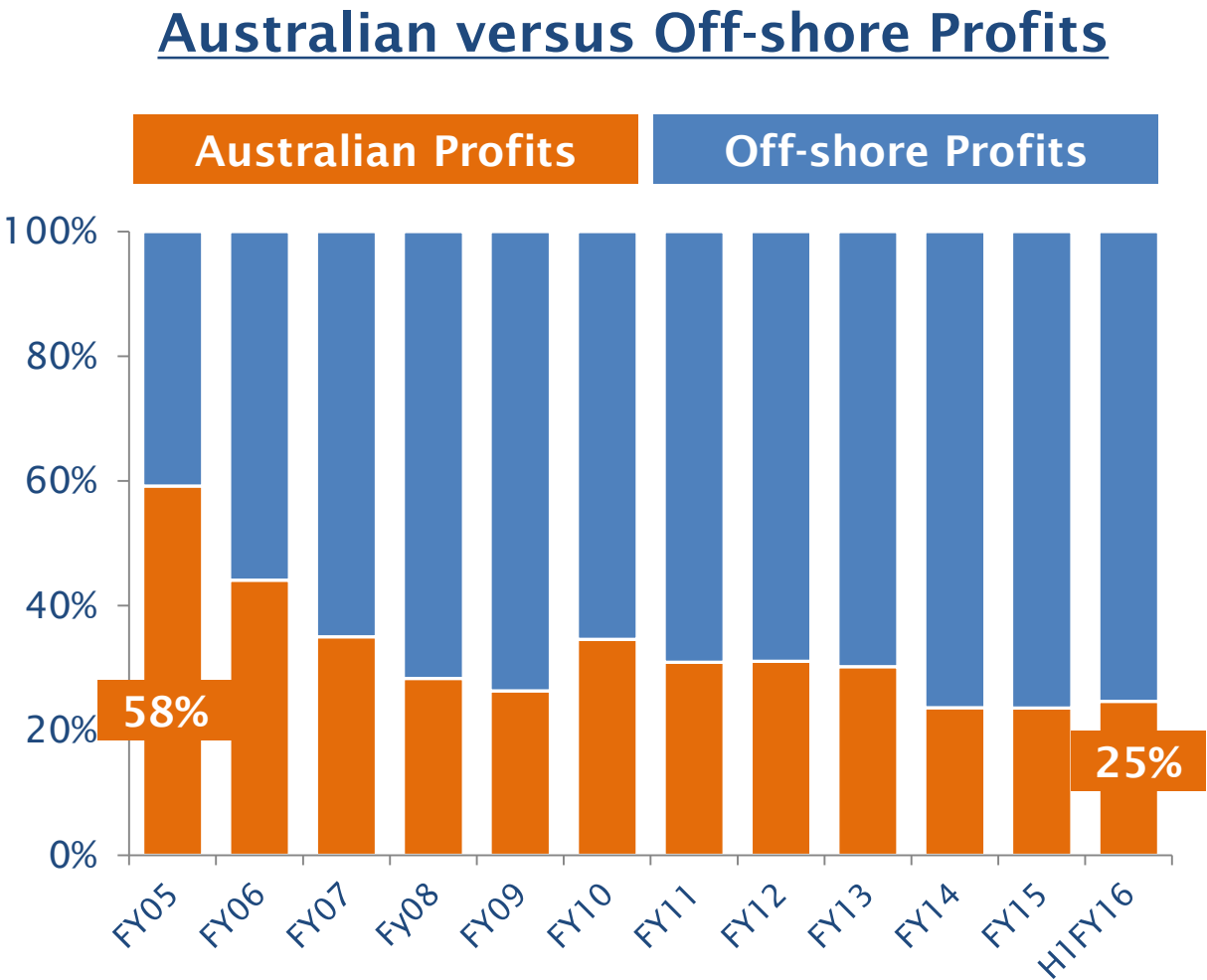


Positive Performance Scorecard

Focus on Training and Continuous Improvement

Client Recognition

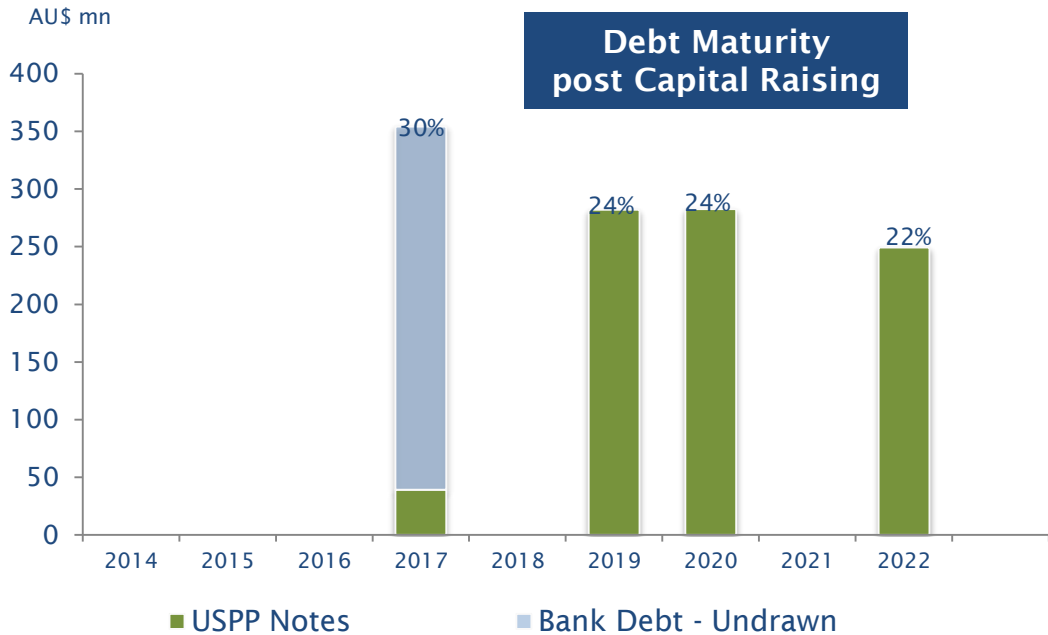
Earnings and Debt Position



		Sep-14	Mar-15	Post Capital Raising
Funding statistics				
Gearing ratio	Comfort 45%	35.5%	38.3%	26%
Leverage (net debt / EBITDA)	Max 3.25	2.7	2.5	1.8
EBITDA interest cover	Min 3.75	8.8	9.1	9.2

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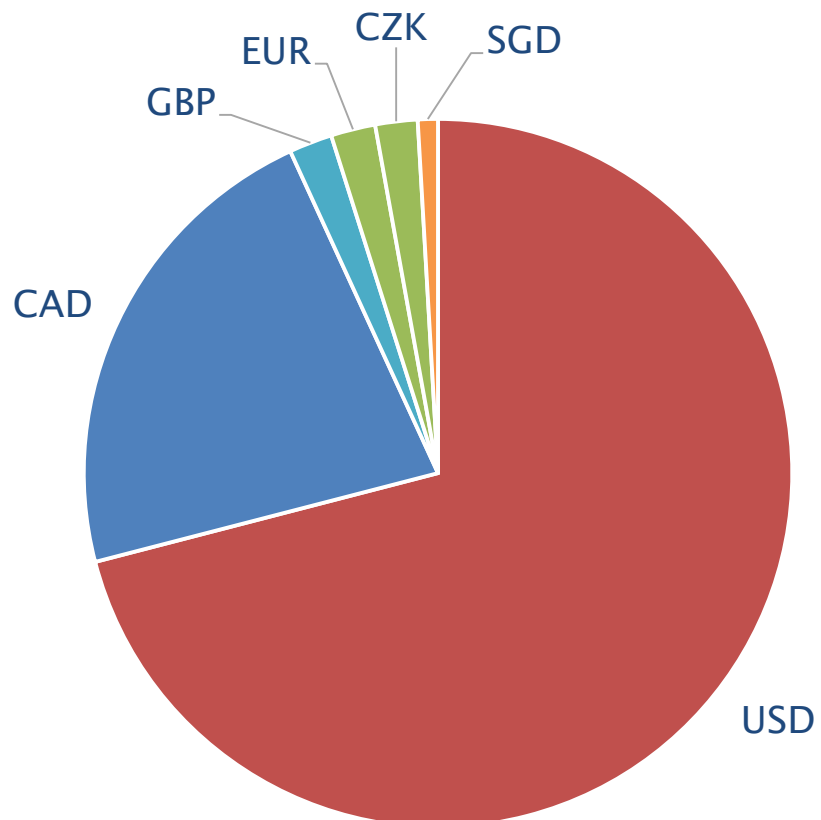


¹ Gearing ratio is net debt / net debt + total equity; ²3.25x is temporary and will revert to 3.0x effective 31 March 2016 in the absence of being extended by lenders;
³ EBITDA / net interest expense

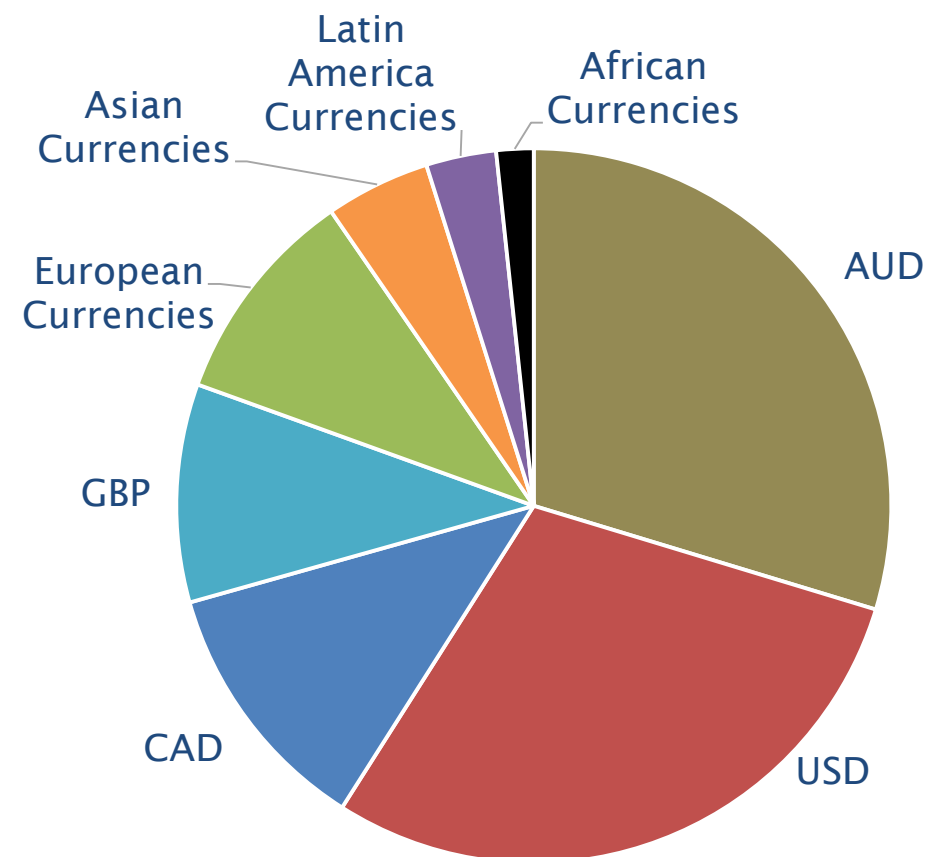
Debt Position – “earning currencies” a natural hedge



Debt Denomination



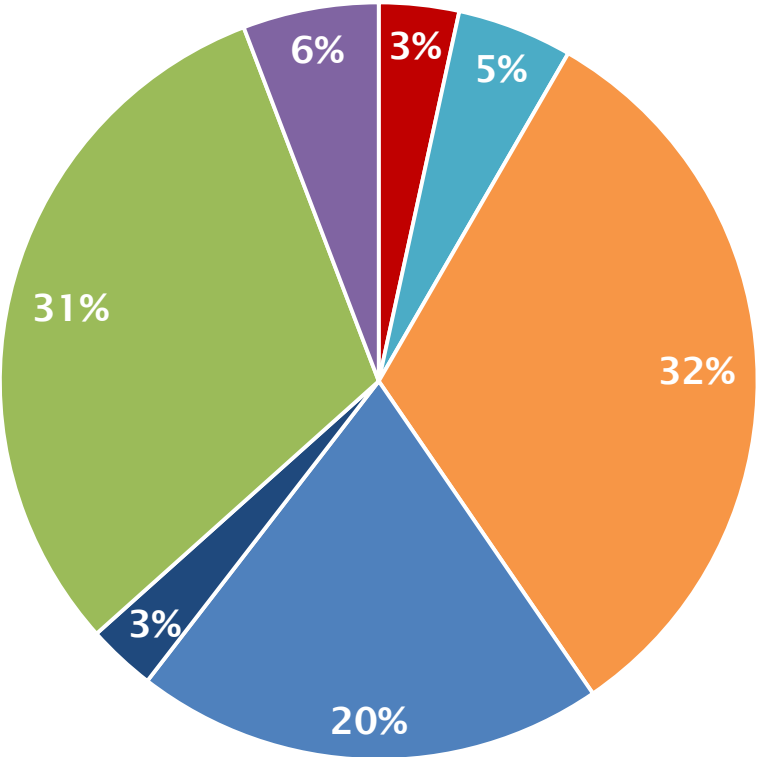
Invoice Currency



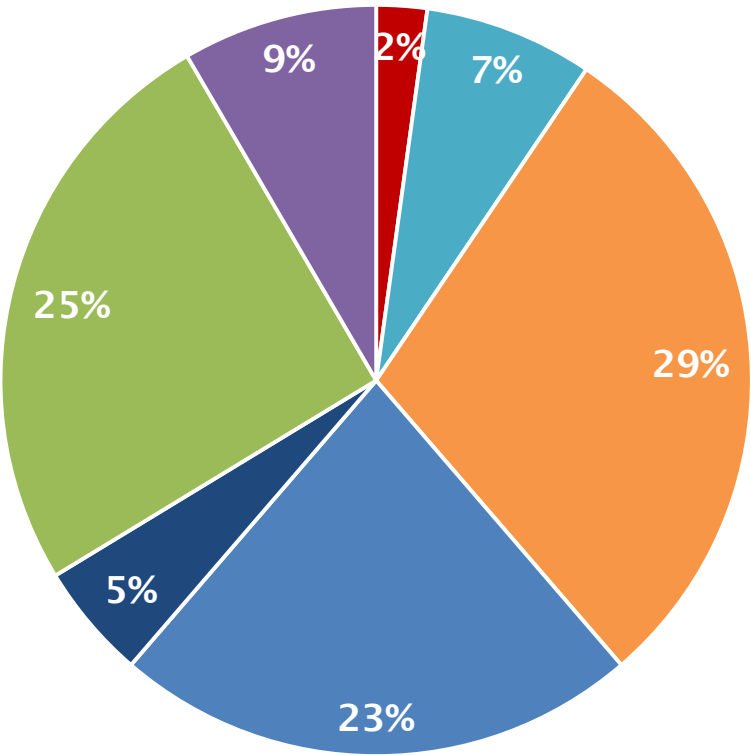
Regional Diversification – H1FY16



Revenue

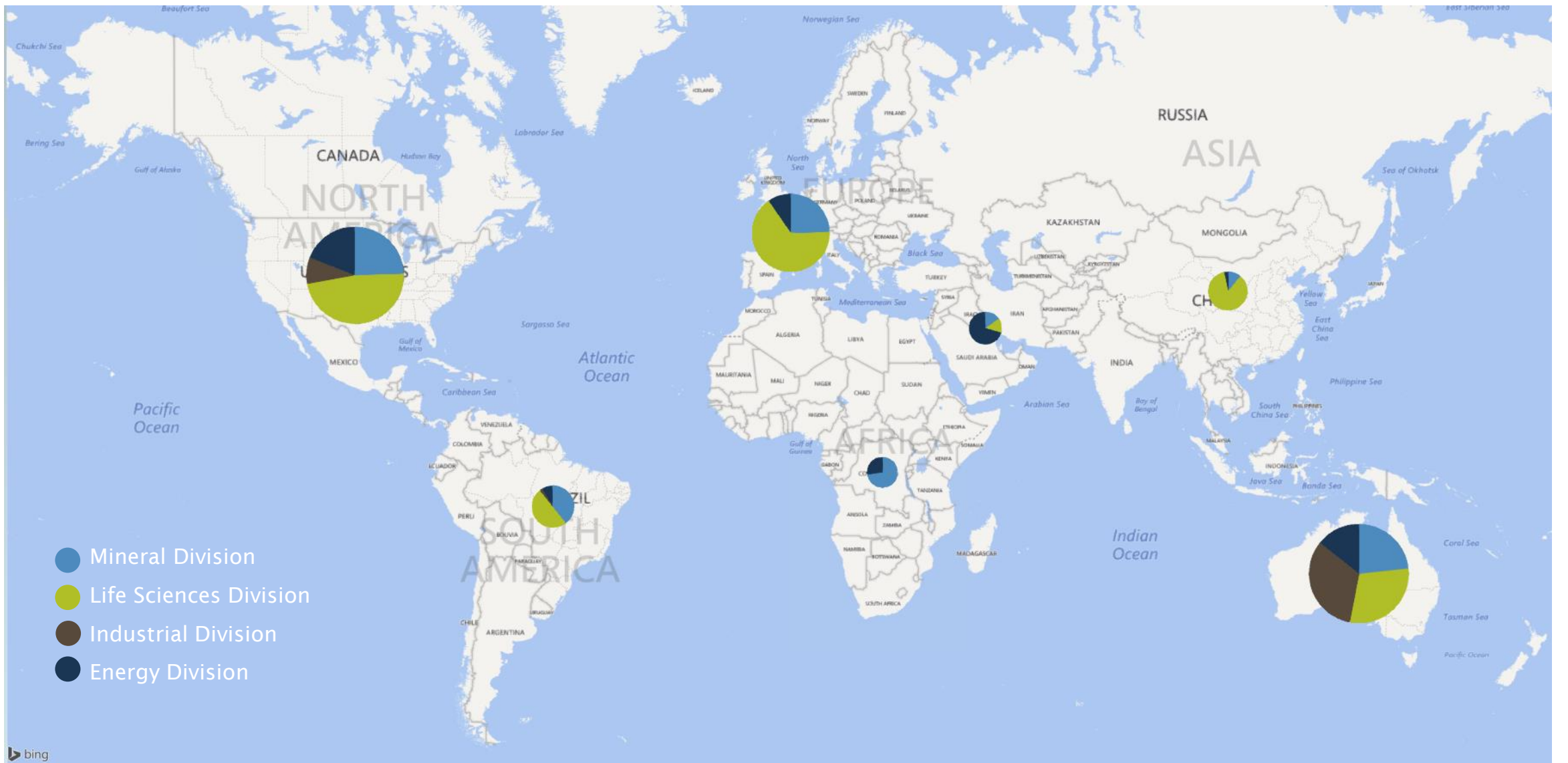


EBITDA



Australia Asia South America North America Africa Europe Middle East

H1FY16 – Revenue by Region by Division



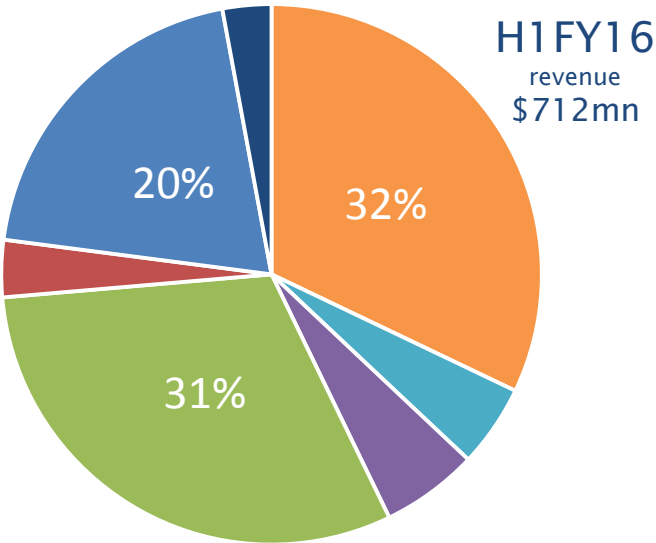
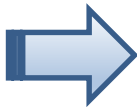
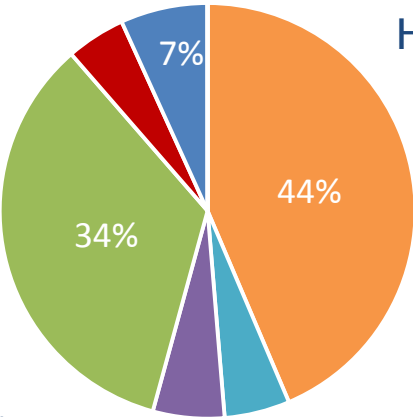
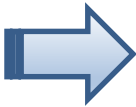
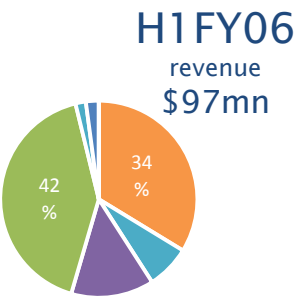
in a nut shell.....

To be the market leader in any geography or market sector we operate - by creating an enduring competitive advantage.

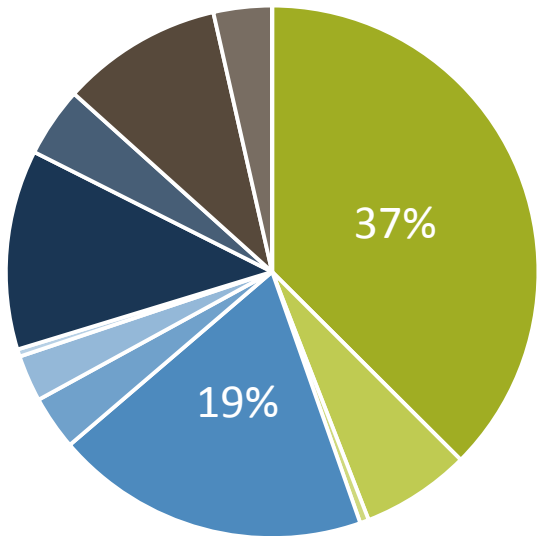
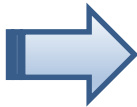
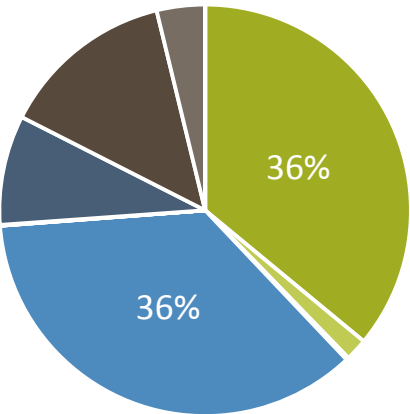
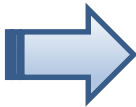
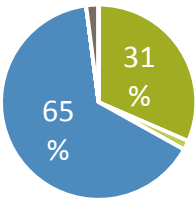
what does that look like.....

- Technical leadership
- Innovative services
- Continually evolving services
- Holistic full service
- Flexible service delivery approach
- Data management
- Providing the “Right Solutions” as opposed to just a “Bundle of Services”
- Being the “Right Partner” as opposed to the “Right Service Provider”

Group Strategy – geographies & markets

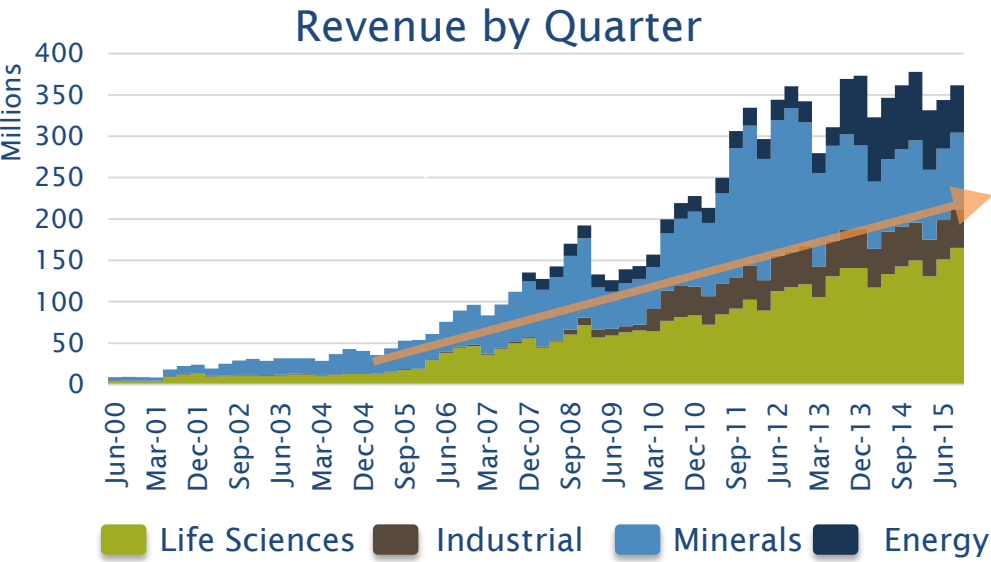
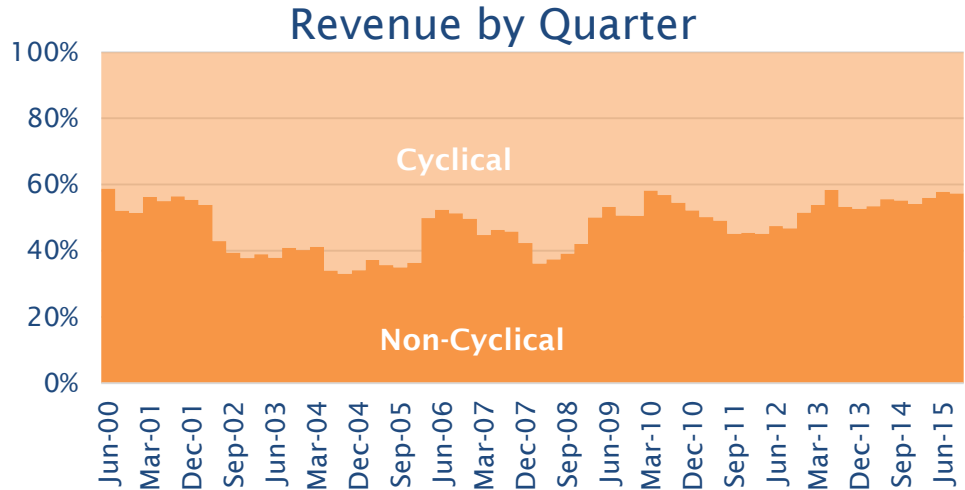
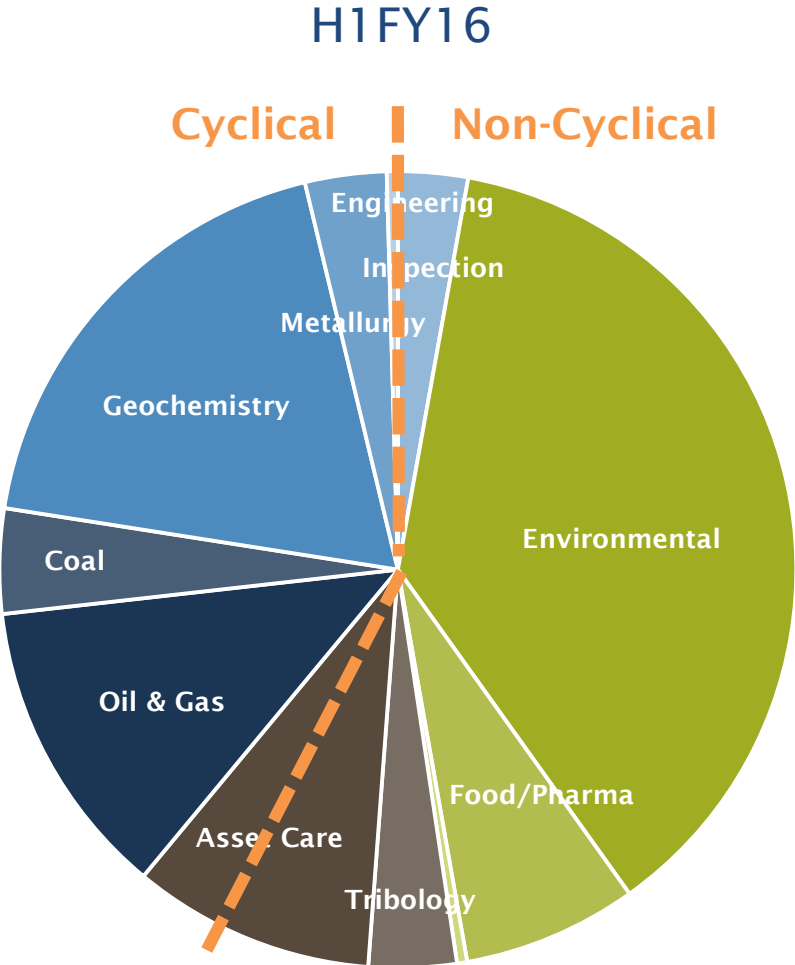


- Australia
- Asia
- South America
- North America
- Africa
- Europe
- Middle East



- Environmental
- Food/Pharma
- Consumer Products
- Geochemistry
- Metallurgy
- Inspection
- Engineering
- Oil & Gas
- Coal
- Asset Care
- Tribology

ALS Laboratory Revenue – strategic mix





- 400+ sites
- 70+ countries
- 6 continents
- global IT network

- quality
- timeliness
- service
- innovation
- technology
- value

- LIMS
- MIS
- standardisation
- systemisation
- multi-language
- global

- state-of-the-art
- innovators
- standardisation
- unique
- centres of excellence

- people
- training
- focus
- client service
- communication
- passion





Underlying ¹ results (AU\$)	H1 FY16	H1 FY15	Change
Revenue	\$318mn	\$276mn	+15%
EBITDA	\$76mn	\$66mn	+16%
EBIT	\$59mn	\$51mn	+16%
EBIT Margin	18.5%	18.4%	+10 bps

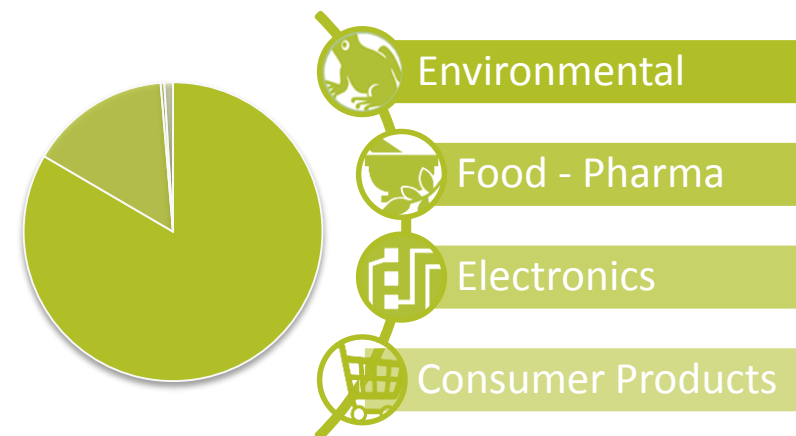
¹ Excluding restructuring and other one-off items, amortisation of acquired intangibles and divestment write-downs

Overview

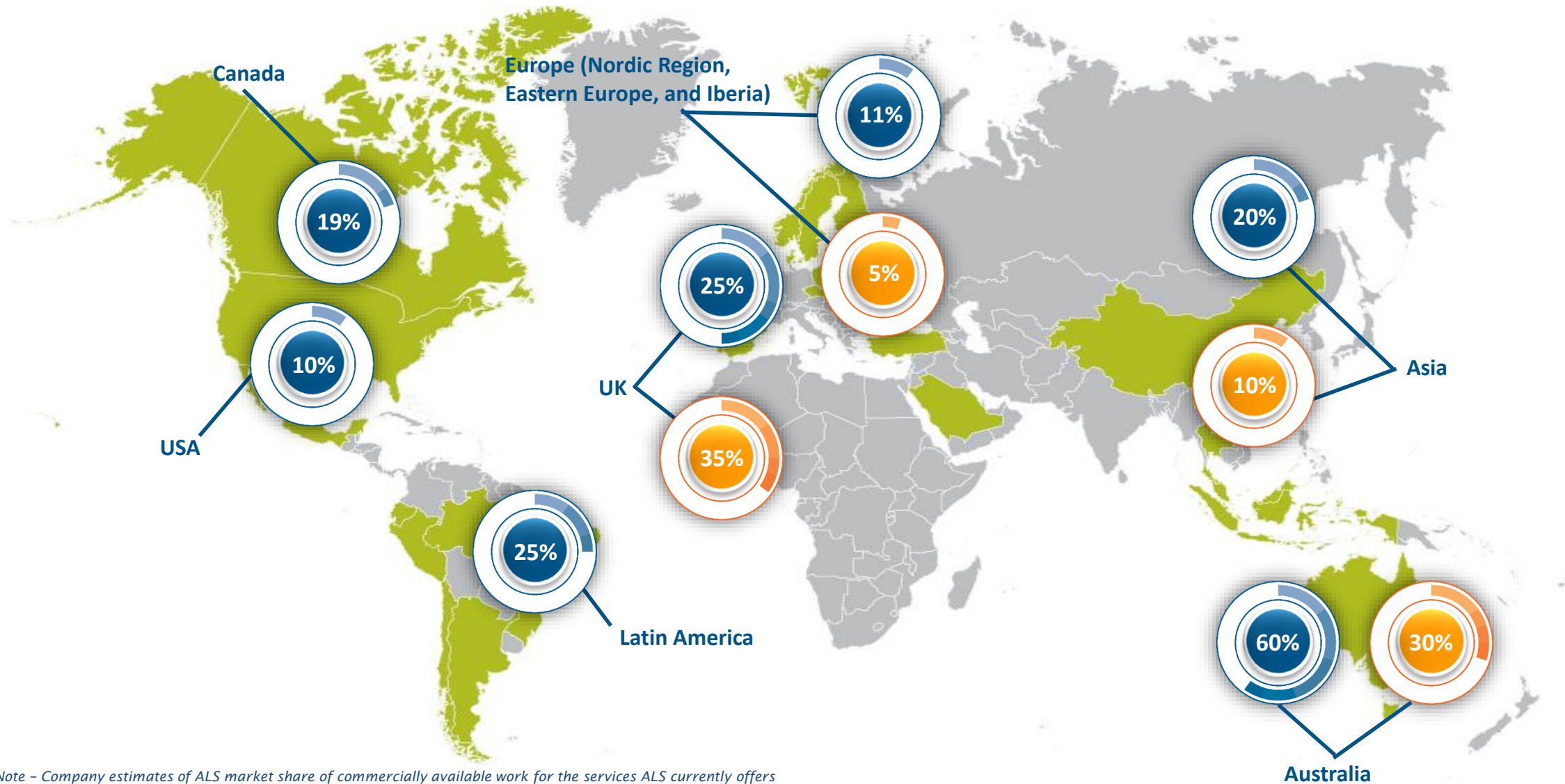
- Environmental
 - Grew revenue by 13% over H1 FY15
 - Gains in all regions
 - Improved margin performance in Australia and South America
 - Assisted by new contract work and cost management
- Food
 - Achieved revenue growth of 31% over H1 FY15
 - Acquisition of Controlvet in April 2015 – operations in Portugal, Spain and Poland

Outlook

- Global markets expanding
- Organic growth and bolt on acquisitions
- Focus on Food Safety Markets



ALS Current Food and Environmental Market Share



Note – Company estimates of ALS market share of commercially available work for the services ALS currently offers

Life Sciences historical growth 2007 to 2015

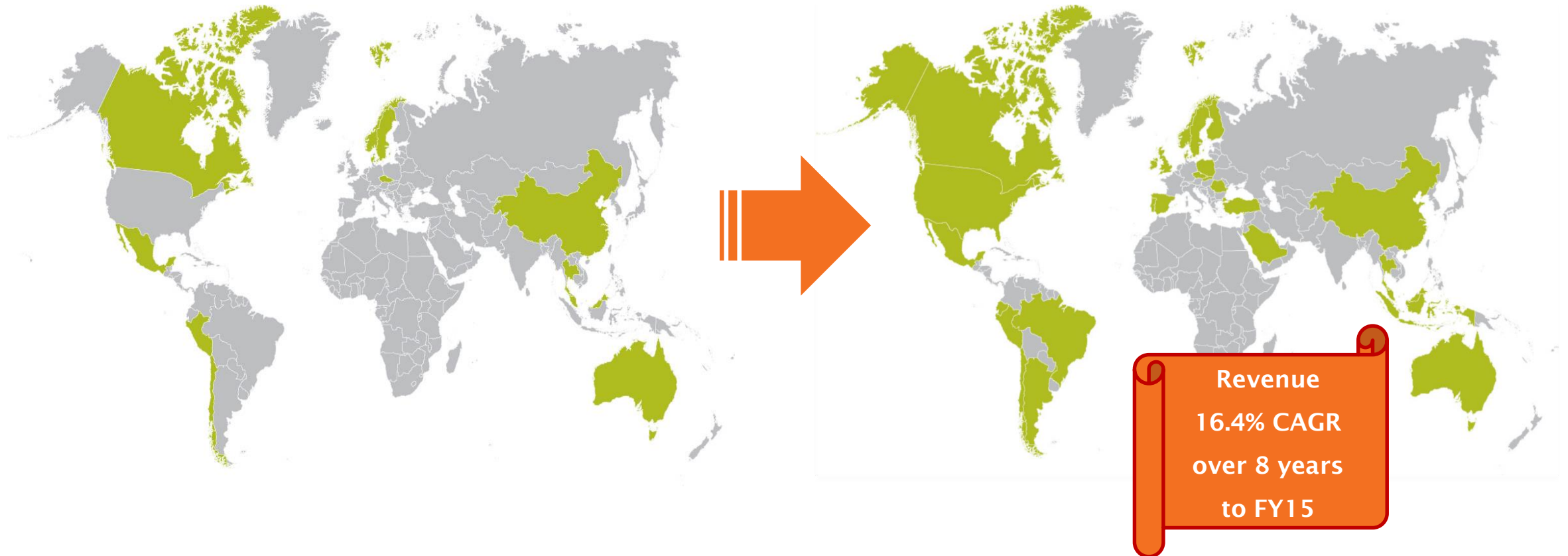


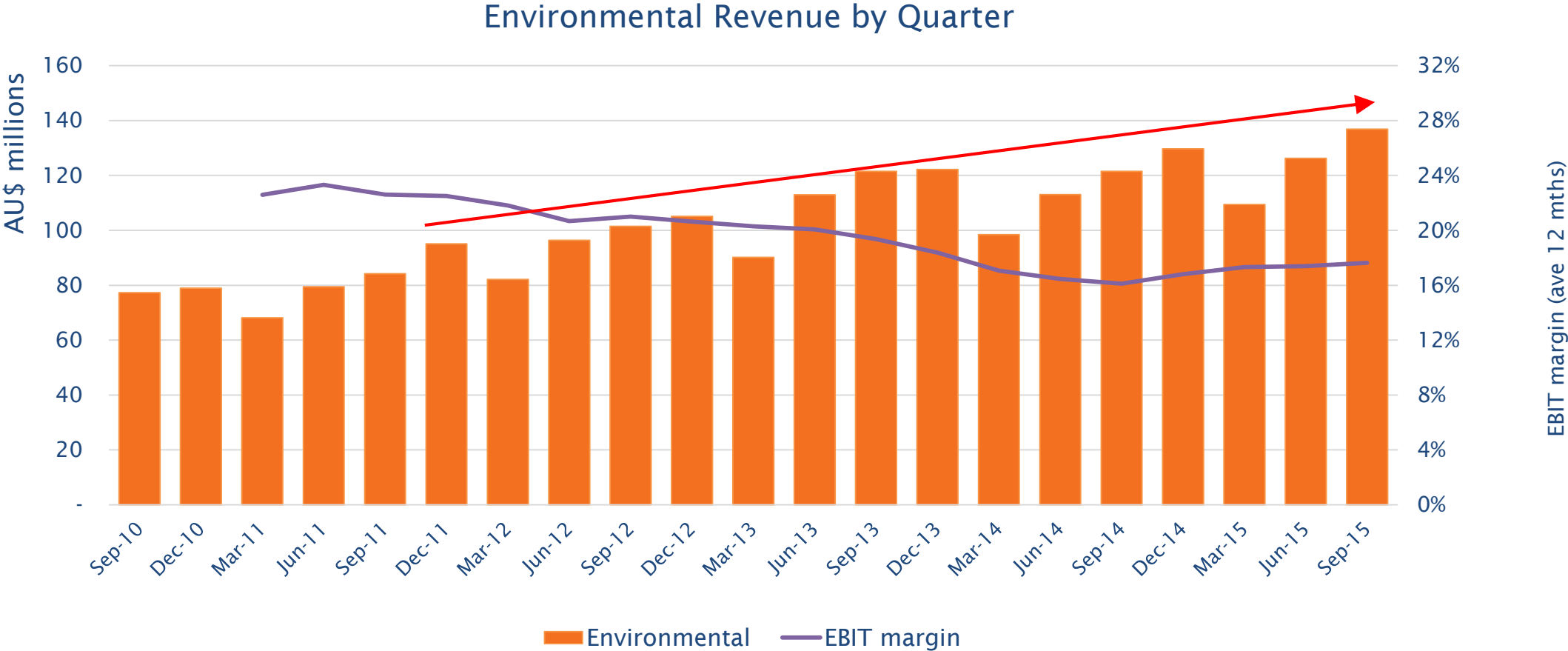
2007

LOCATIONS	REVENUE	EBITDA	EBITDA%
34	AU\$165mn	AU\$37mn	22%

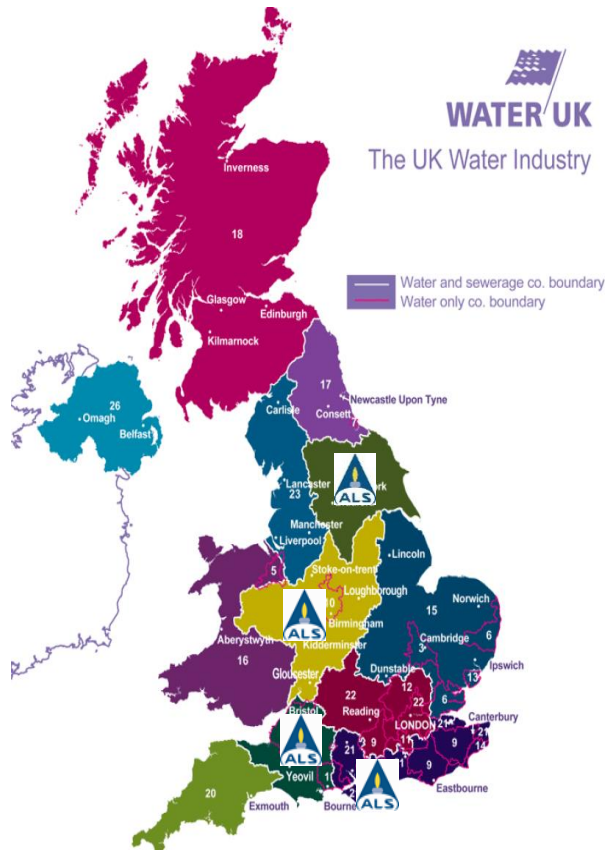
2015

LOCATIONS	REVENUE	EBITDA	EBITDA %
145	AU\$556mn	AU\$125mn	22%





Note - EBIT margin inclusive of abnormals

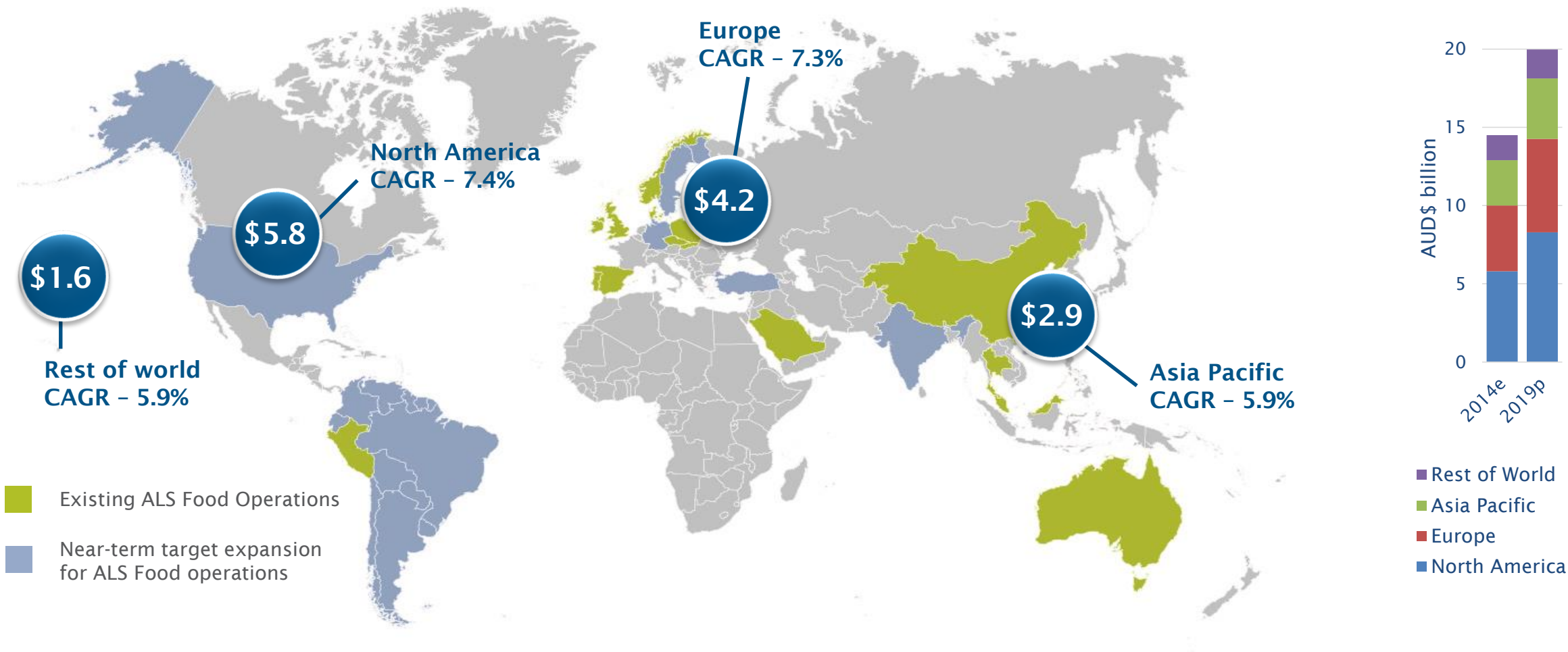


- Mature business
- Global footprint:
 - 71 laboratories in 32 countries
 - Additional 50 sales offices to access broader geographical market
- Largest provider of environmental analytical services in the world
- World class USEPA compliant full service laboratory in Peru
- Continued focus on water analytical capabilities from water authorities:
 - 85% market share in Australia and 50% in the UK
- The “ALS Experience”
- Global environmental market growth is 1% to 2% per annum.
 - ALS Environmental is growing at 10% to 15% per annum

Current Food Testing Market Size (in billion AU\$)



Global food safety testing market size (in AU\$bn) and ALS presence



Source: Markets and Markets research report - Global Food Safety Testing Market - Global Trends and Forecasts to 2018



Achievements to date

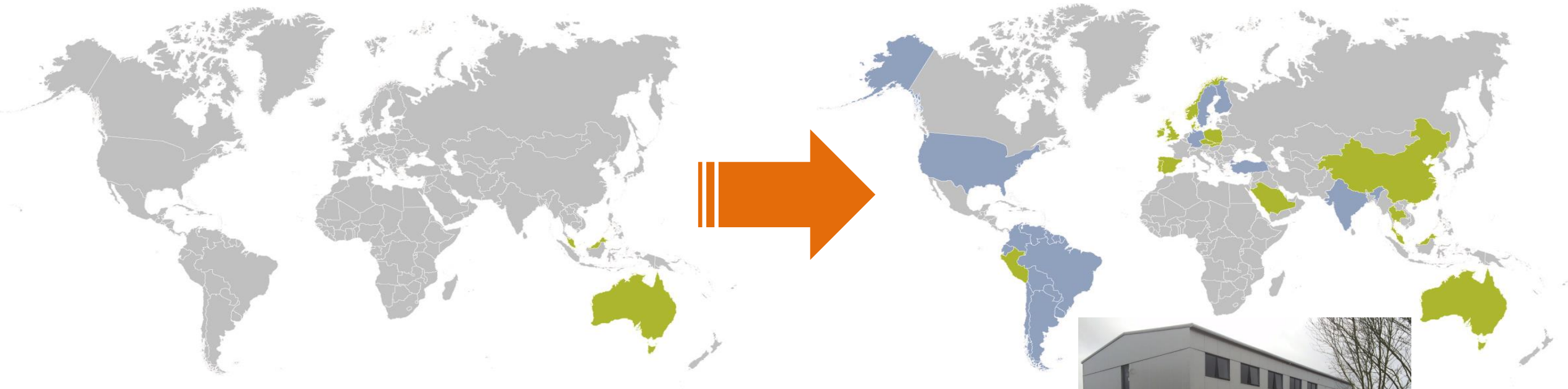
- Multi-language LIMS built and being rolled out globally
- Client portal built –version 3 (ALSolutions) released in October 2015
- MIS built and rolled out
- Global instrument standards in place
- Global methods standardised
- Hub & spoke network in Europe –75% in place
- “Farm to Fork” holistic service –developed
- Technical capabilities in place
 - Chemistry
 - Microbiology
 - Sensorial
 - Consulting
 - Auditing

Historical – Food & Pharma growth 2007 to 2015



2007

2015



- Existing ALS Food Operations
- Near-term target expansion for ALS Food operations

New Pharmaceutical Laboratory under construction in Ely (United Kingdom) due to be commissioned January 2016



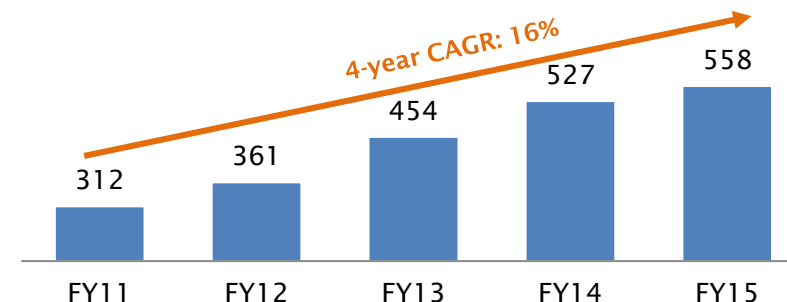
Rights funding flexibility to accelerate growth in Life Sciences



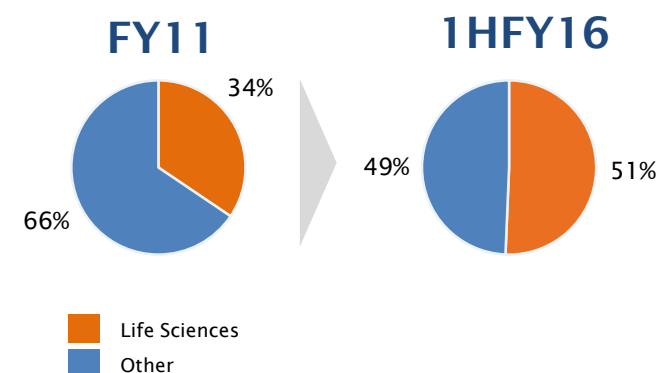
Overview of Life Sciences Opportunity

- Largest and fastest growing division of ALS
 - 51% of group EBITDA in H1FY16
 - Growth of 15% in H1FY16 over pcg
- Operates two business streams
 - Food and Pharmaceuticals
 - Environmental
- ALS strategy to continue to diversify earnings and grow non-cyclical businesses
- Fragmented markets that continue to grow globally, providing consolidation opportunities
- ALS believes it has a strong pipeline of identified growth opportunities across existing and new geographies

Revenue (AU\$mn)



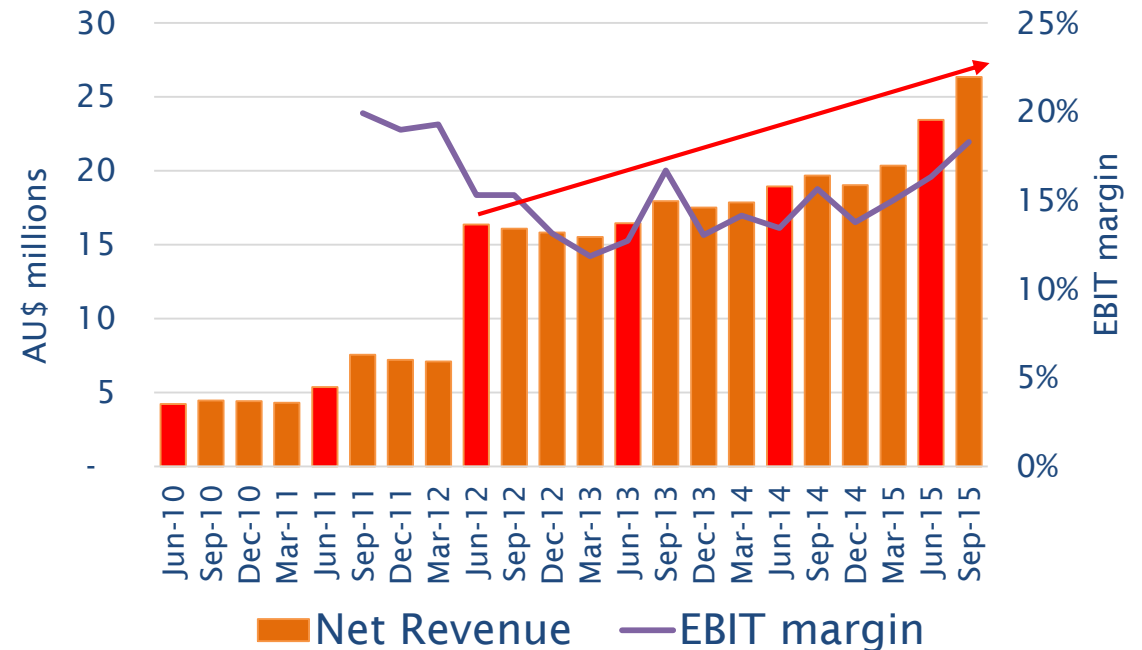
Group EBITDA contribution

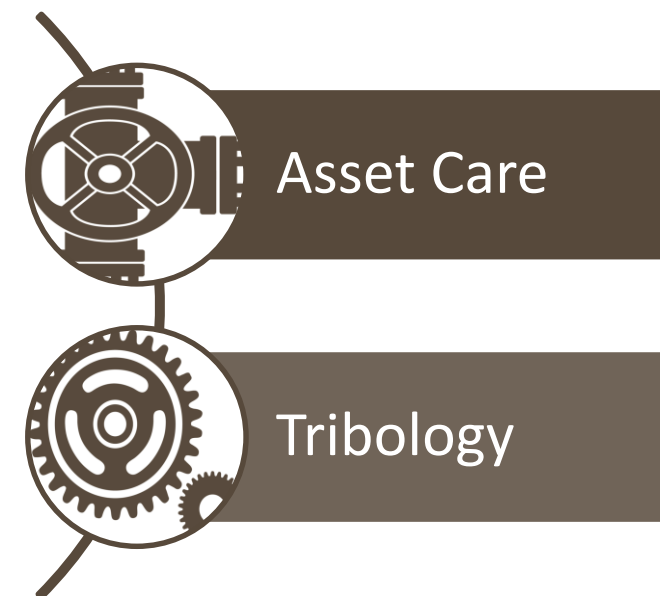


Overview of Food Strategy

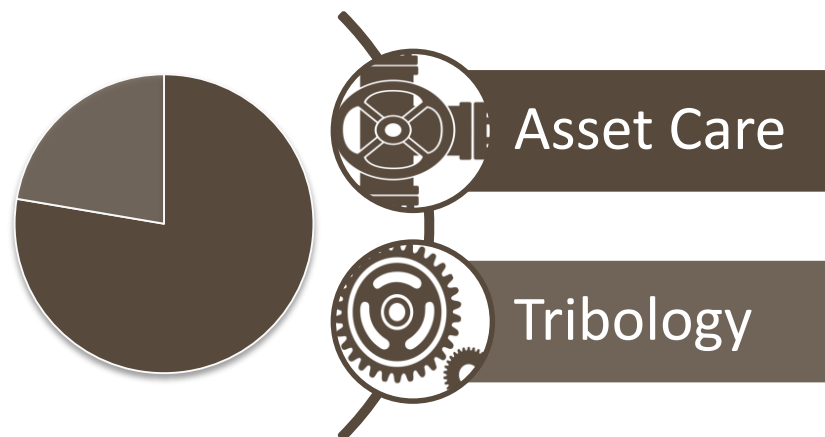
- In 2012, ALS developed a strategy to build a AU\$200m pa integrated food analytical business
- Significant achievements since 2012 include:
 - Global LIMS built and rolled out
 - MIS built and rolled out
 - Hub & spoke network established
- Earnings growth achieved organically and through bolt-on M&A
- ALS believes building blocks are in place for next phase of growth and to transition into a scaled, global business
- Dual growth strategy – accelerate market penetration and expand into new geographies

Food/Pharma revenue by quarter





Underlying ¹ results (AU\$)	H1 FY16	H1 FY15	Change
Revenue	\$95mn	\$100mn	-5%
EBITDA	\$16mn	\$20mn	-16%
EBIT	\$14mn	\$17mn	-19%
EBIT Margin	14.3%	16.6%	-230 bps



Overview

- Asset Care
 - Revenue down 11% compared with H1 FY15
 - Decline in the capital expenditure-exposed major construction projects in the LNG and mining sectors
- Tribology
 - Continues to grow
 - USA contributions grew 23% over H1 FY15

Outlook

- Continued growth expected in Tribology
- Growth in OPEX facing Asset Care business in Australia
- Bolt on acquisition in Asset Care in USA
- Further contraction in CAPEX investment in Australian Oil & Gas market for Asset Care

¹ Excluding restructuring and other one-off items, amortisation of acquired intangibles and divestment write-downs

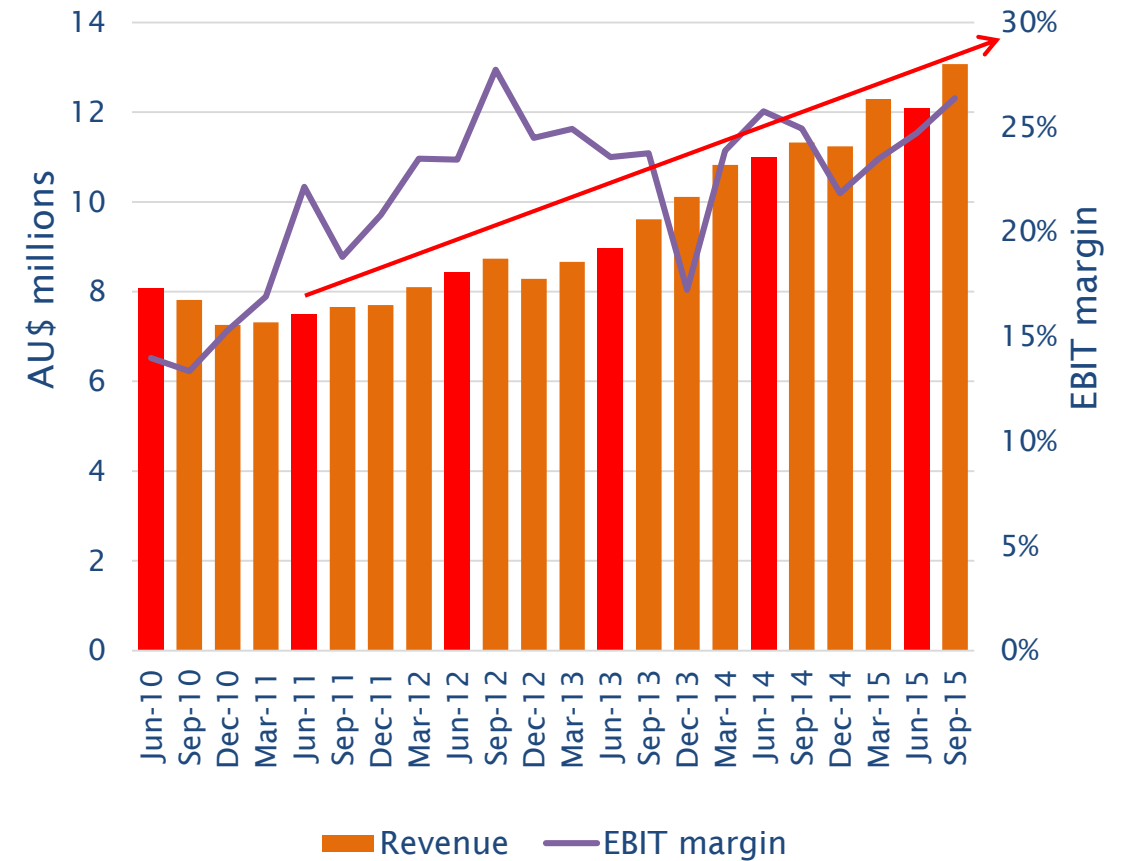
ALS Tribology Performance



Perth Tribology Laboratory



Tribology Revenue by Quarter



Note: EBIT margin inclusive of abnormals

ALS Tribology Market Environment



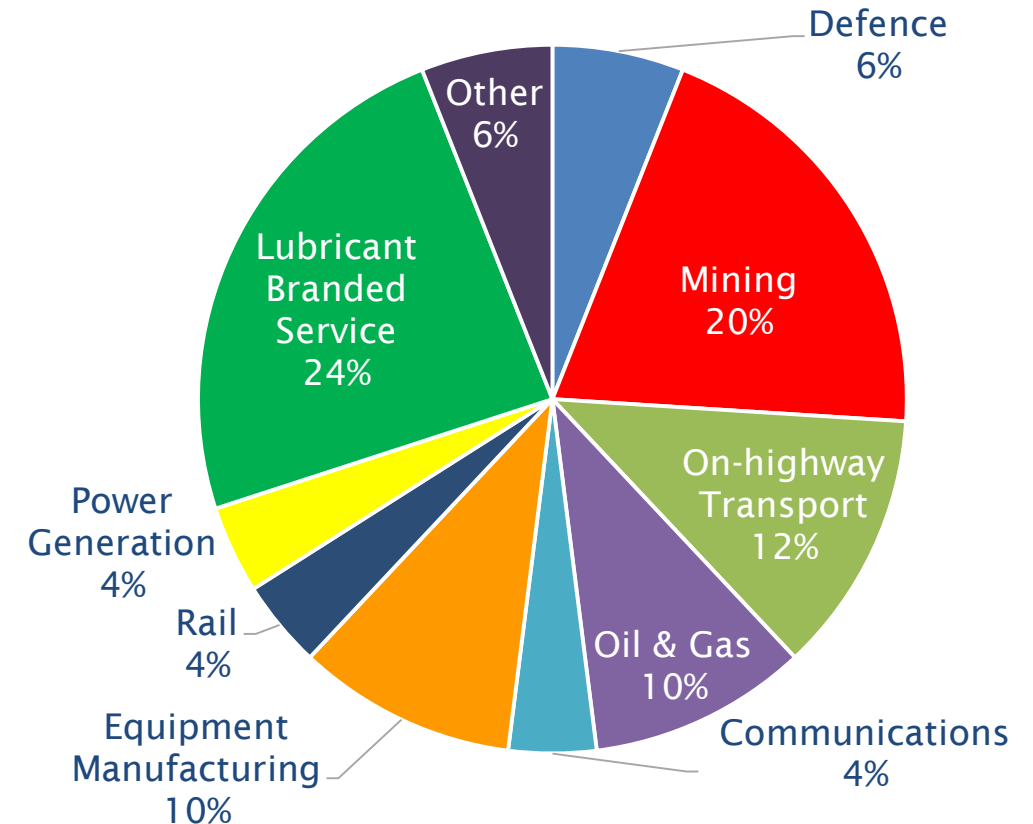
ATA's Truck Tonnage Index
(Seasonally Adjusted; 2000 = 100)



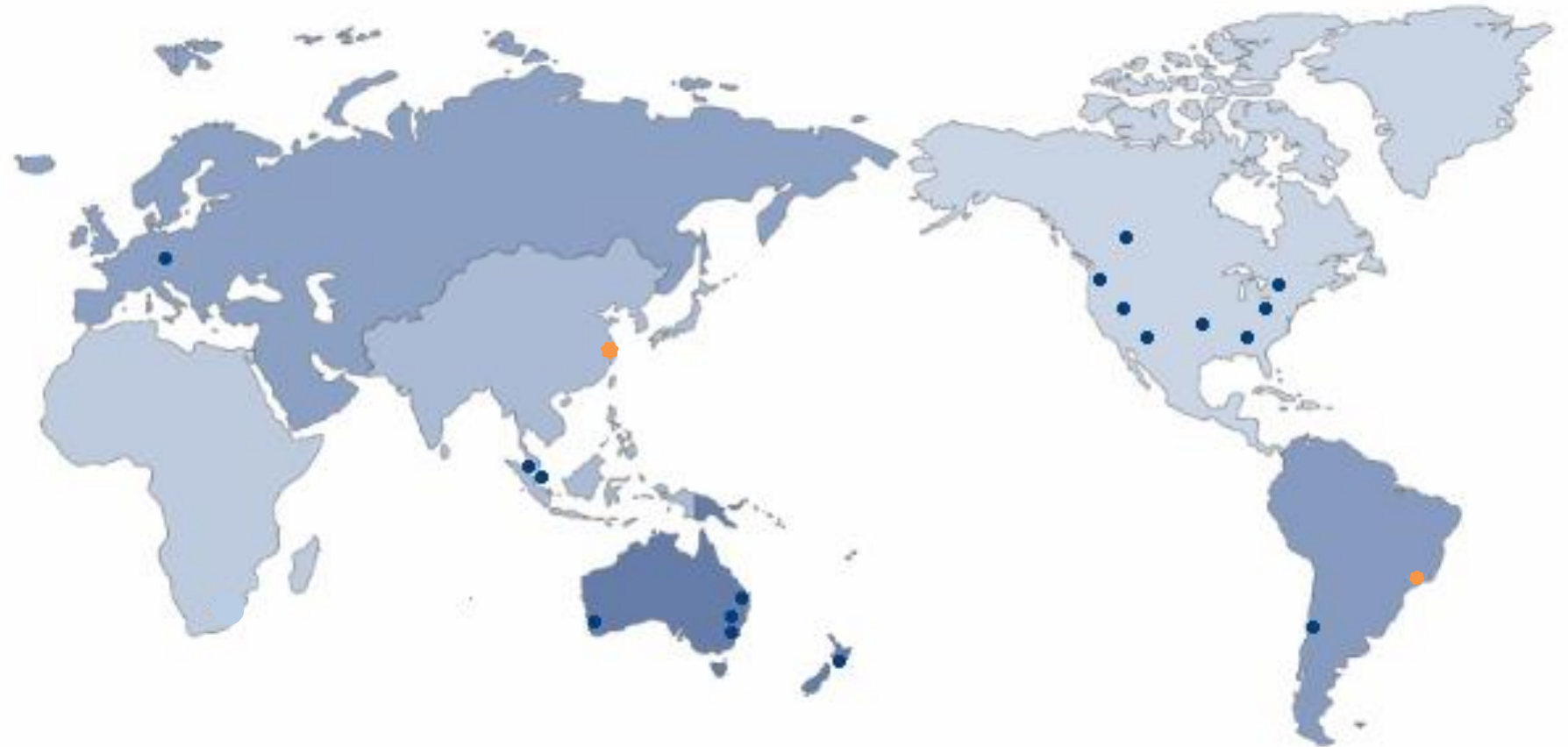
Source: American Trucking Association

- Trucking serves as a barometer of the U.S. economy
- Forecast growth over the next decade ~2.5%

ALS Tribology Revenue by Market Sector



ALS Tribology – Global service offering



- New generation WebTrieve™ to facilitate global reliability programs
- AU\$ 400 million global market ~ market share growth opportunities in all regions

- 'Step ahead' IT
- Right partner – delivering reliability goals and global service provision
- Leading technical capabilities



November 2015

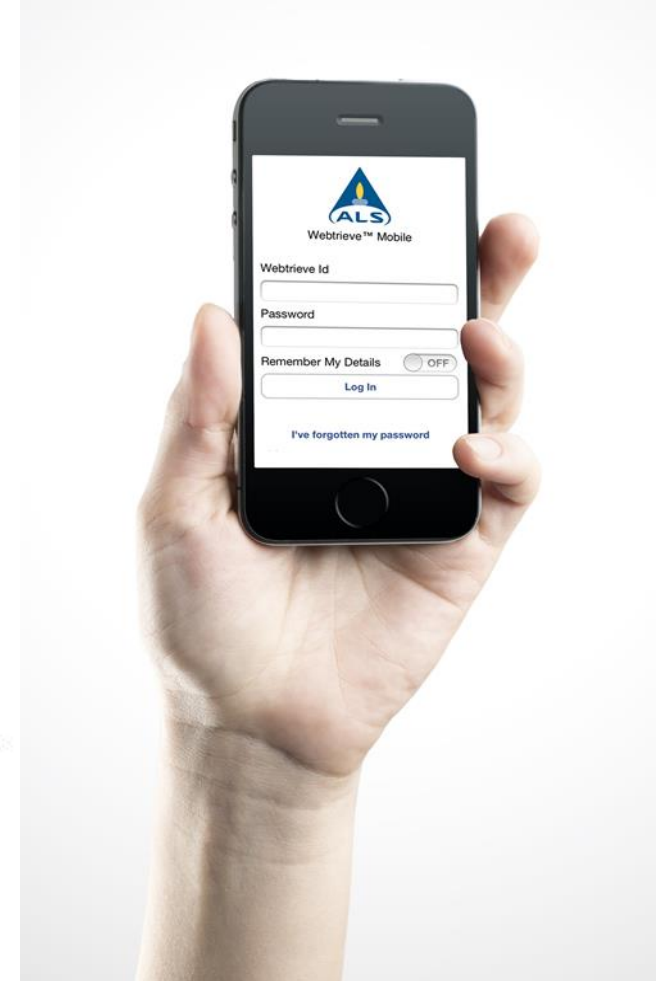


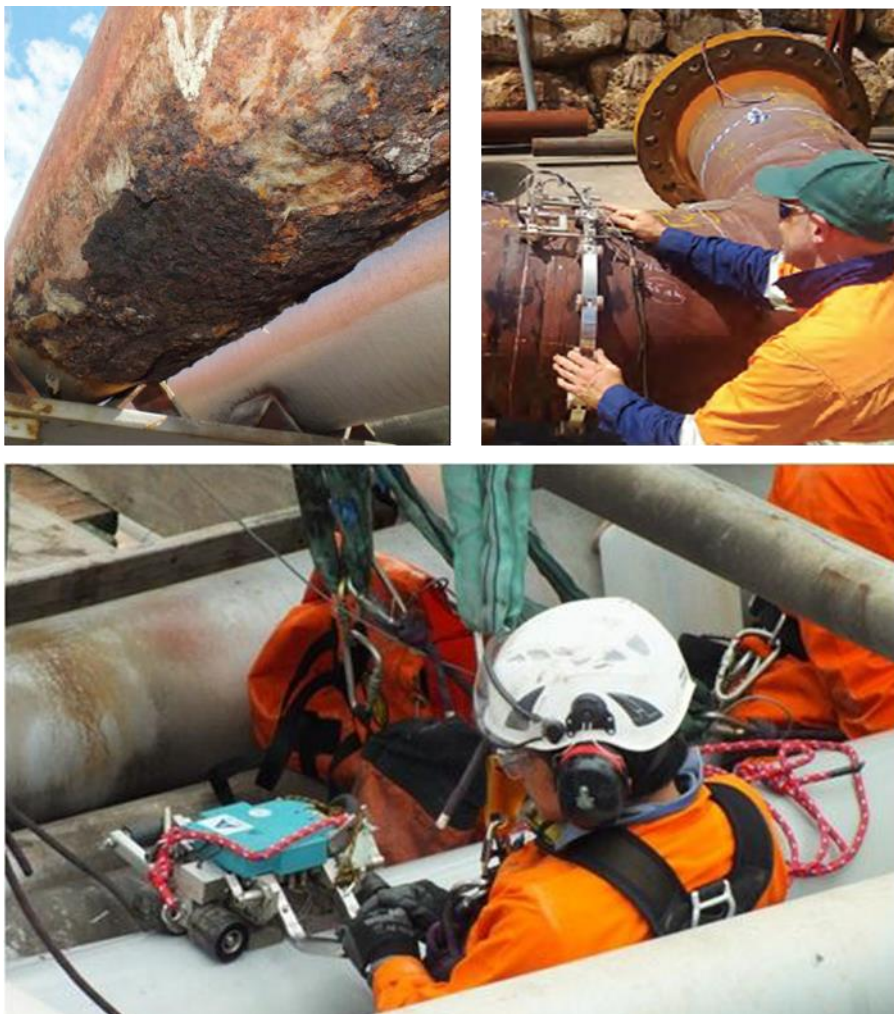
Scale Formation in Diesel Engine Cooling Systems

*by David Doyle, CLS, OMA I, OMA II
General Manager, Tribology*

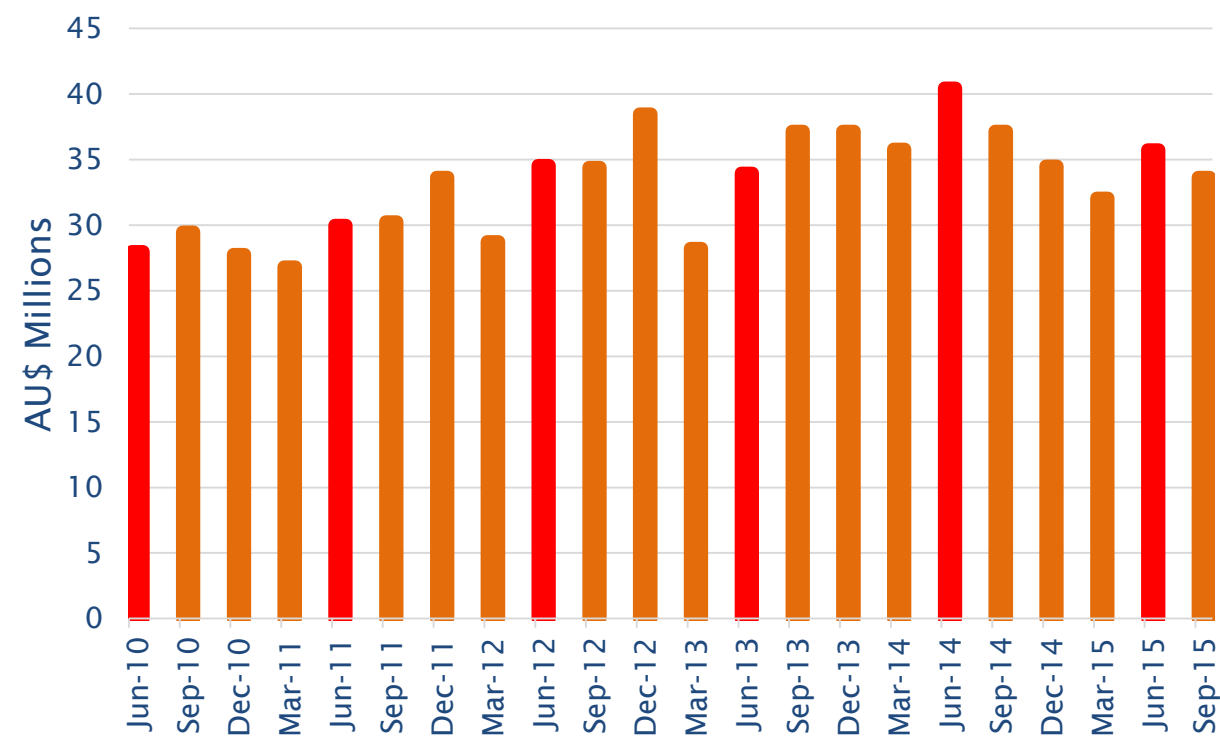
A heavy-duty diesel engine transfers only about one-third of the heat it generates into mechanical energy. This results in a high amount of heat generated that needs to be dissipated from an operating engine. Excess heat generated that does not dissipate through exhaust or to the surrounding atmosphere requires a healthy cooling system to prevent engine failure.

Continue reading [Scale Formation in Diesel Engine Cooling Systems](#)





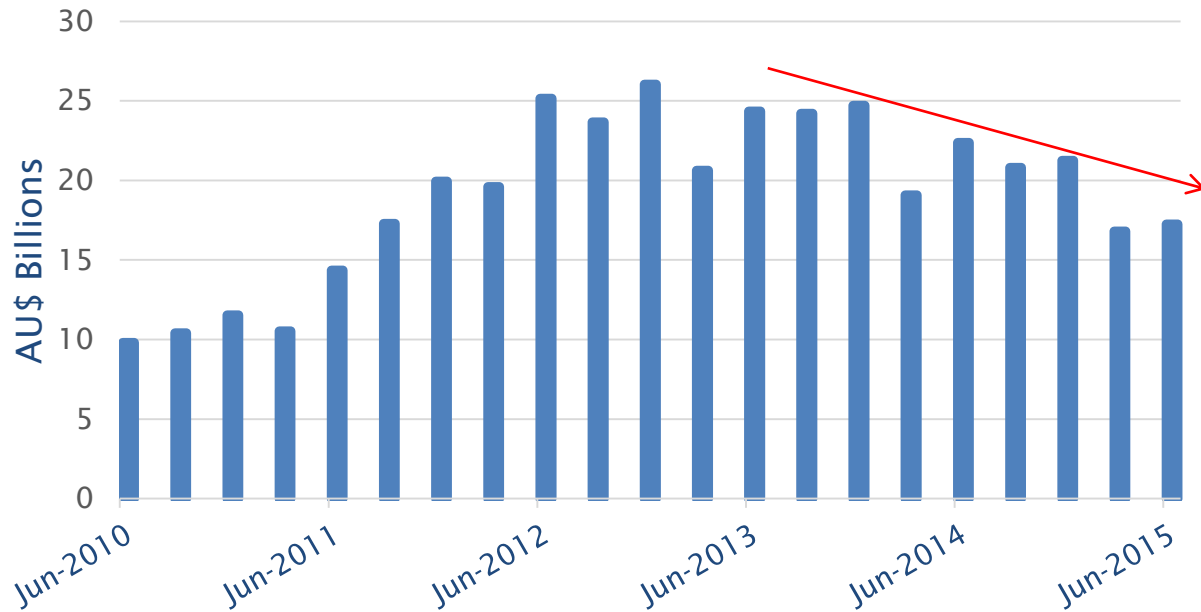
Asset Care Revenue by Quarter



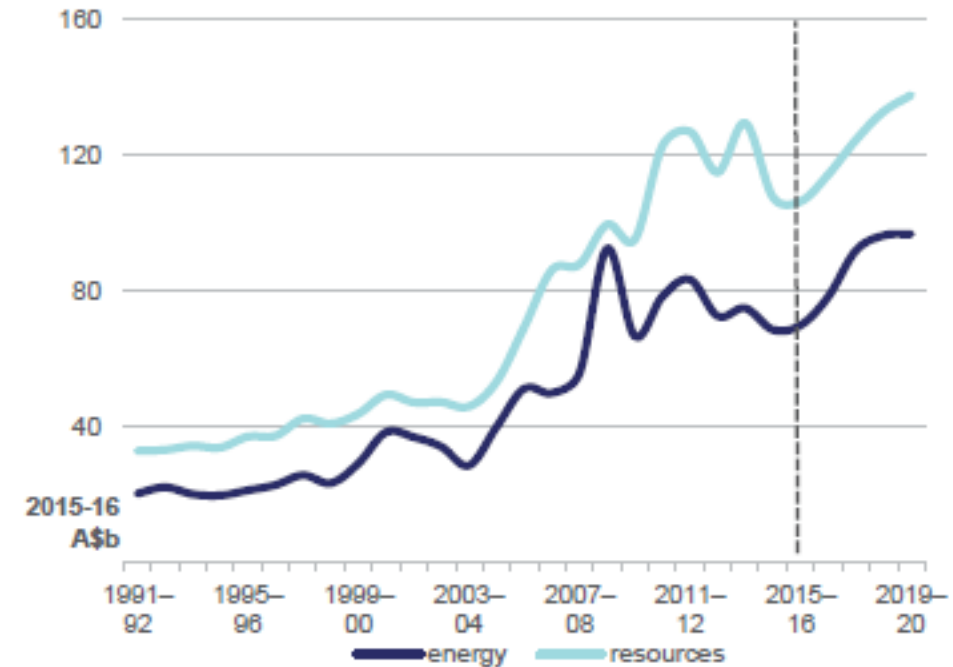
ALS Asset Care Market Environment – Australia



Mining Industry Capital Expenditure



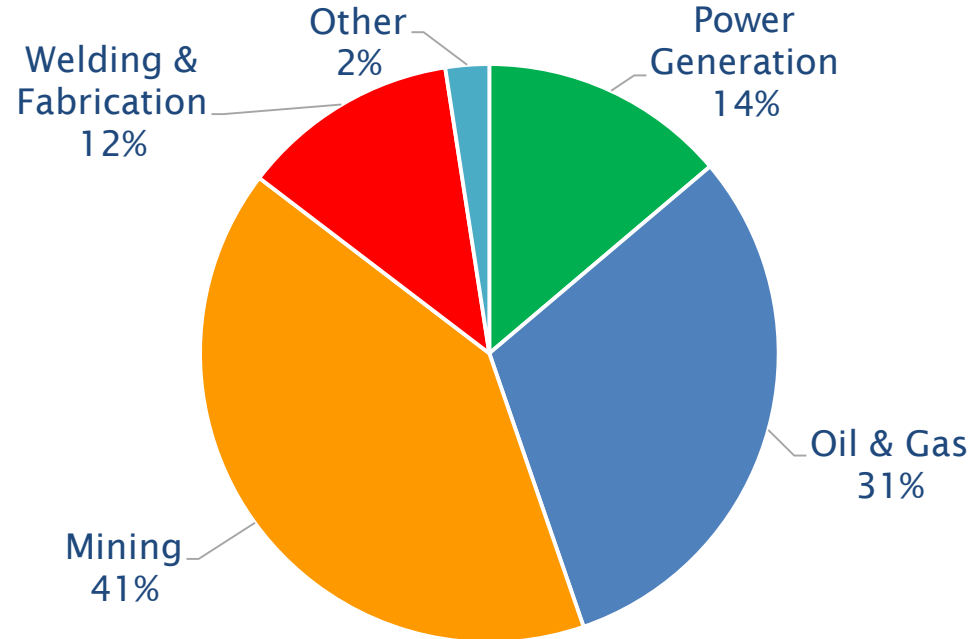
Resource and Energy Export Earnings - Australia



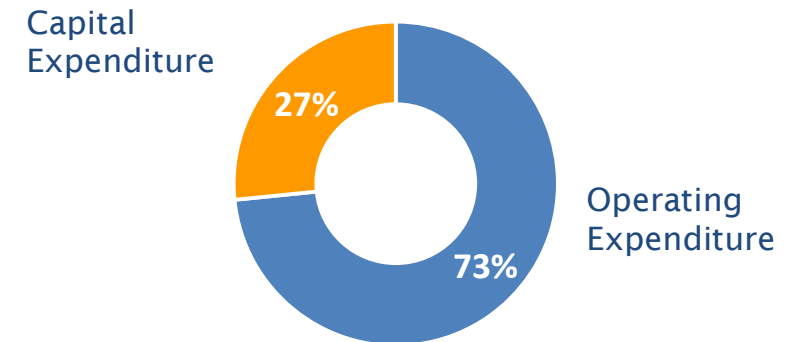
Source: ABS

- Client cost cutting impacting service industry margins.
- Investment in new capacity delivering higher production. Plant health monitoring requirements continuing to grow. Job hours growth currently offset by price pressure and reduced capital expenditure-related services.
- Lag time in addressing labour costs; opportunities to challenge traditional models.

Revenue by Market Sector - Australia



Revenue by Type of Spend



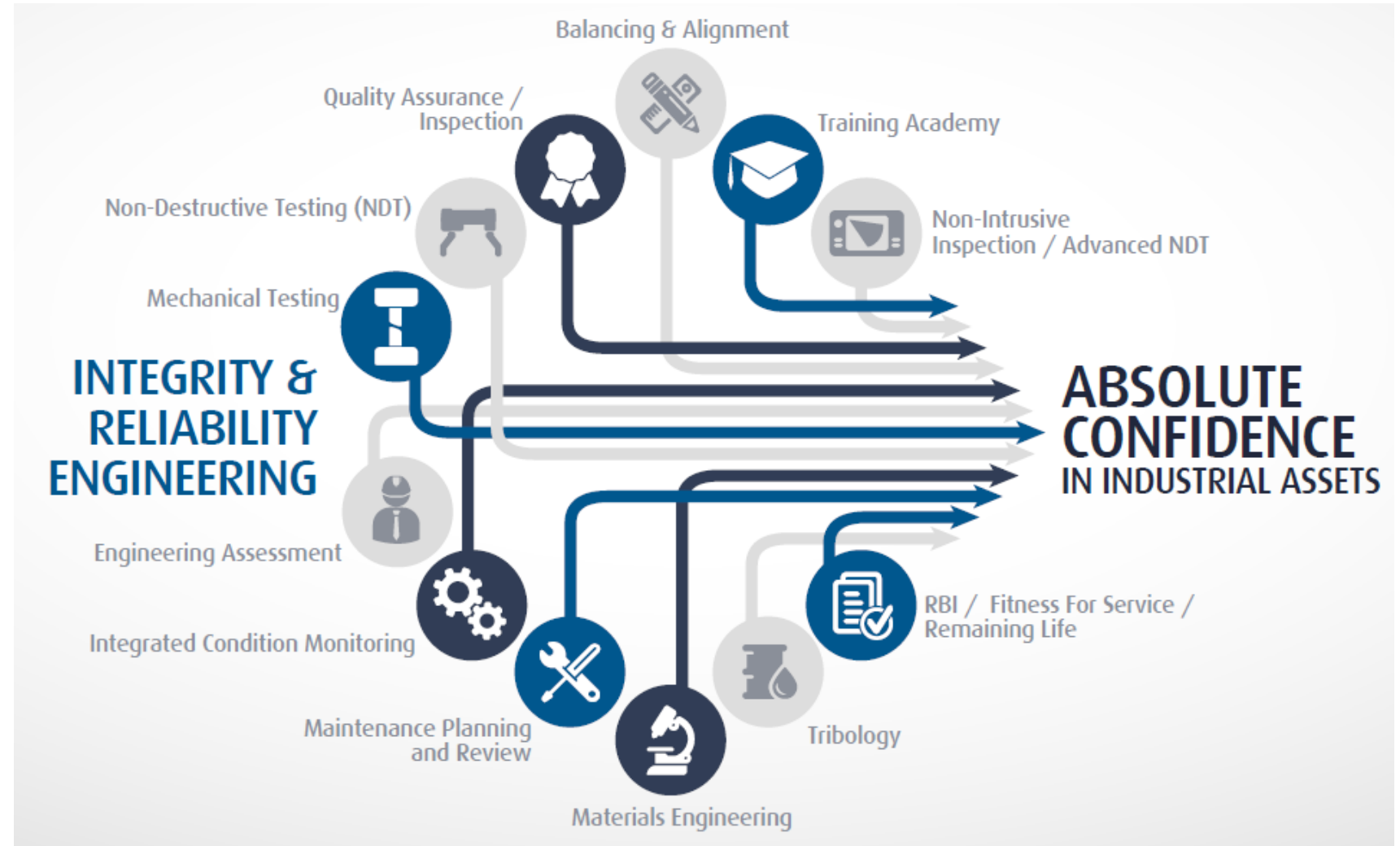
- ALS Australian market share ~ 40-45%; Australian market size ~ AU\$ 300 million
- Global market size ~ AU\$ 20 billion; 5 global players; still highly fragmented

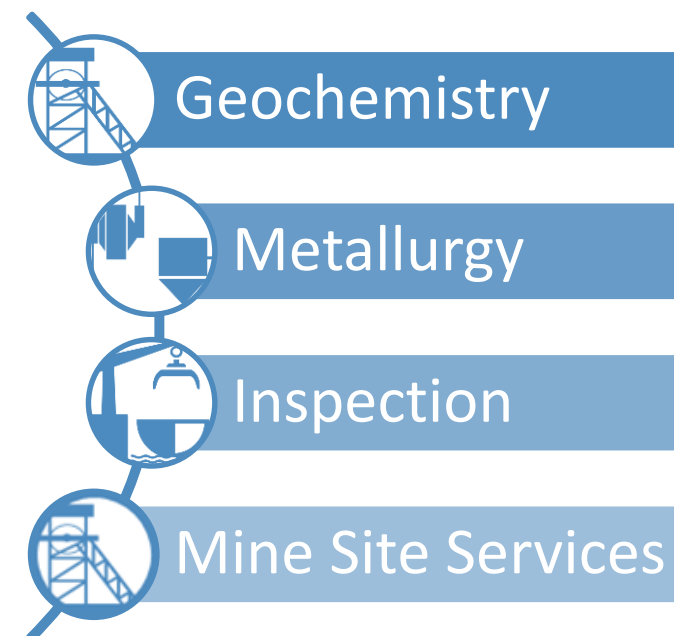
Note: ALS market share is company estimate

ALS Asset Care Strategy

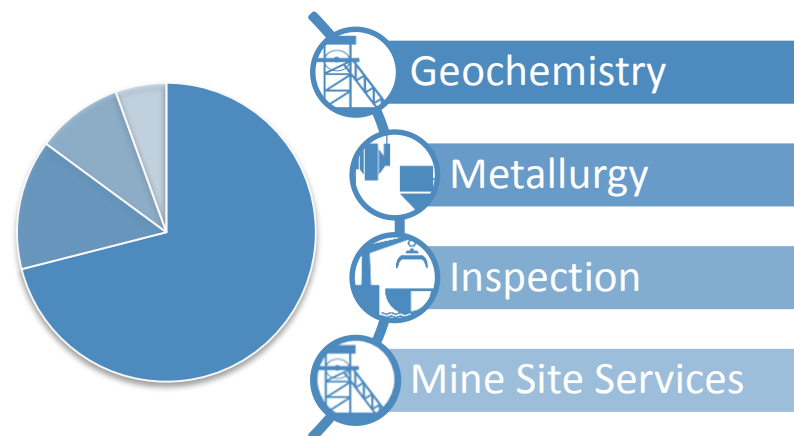


- Right partner
- Local market leadership
- Competitive cost base
- Targeted overseas growth





Underlying ¹ results (AU\$)	H1 FY16	H1 FY15	Change
Revenue	\$183mn	\$182mn	+1%
EBITDA	\$47mn	\$48mn	-
EBIT	\$36mn	\$36mn	-
EBIT Margin	19.5%	19.8%	-30 bps



Overview

- Geochemistry
 - Sample volumes remained flat
 - Contribution margin maintained at 21% of revenue
- Metallurgy
 - Revenue down 5% compared with H1 FY15
- Inspection
 - Achieved strong growth in revenue and contribution from increased market share

Outlook

- Increased market share in geochemistry
- Geochemistry entering new geographical markets (e.g. Ethiopia)
- Focus on Mine Control Laboratory opportunities
- Development of hyperspectral services
- Integrated data management services
- Metallurgy markets to remain challenging
- Further growth in Inspection via market share growth
- Synergies/leverage between mineral and coal inspection

¹ Excluding restructuring and other one-off items, amortisation of acquired intangibles and divestment write-downs

ALS Minerals Division by Service Offering

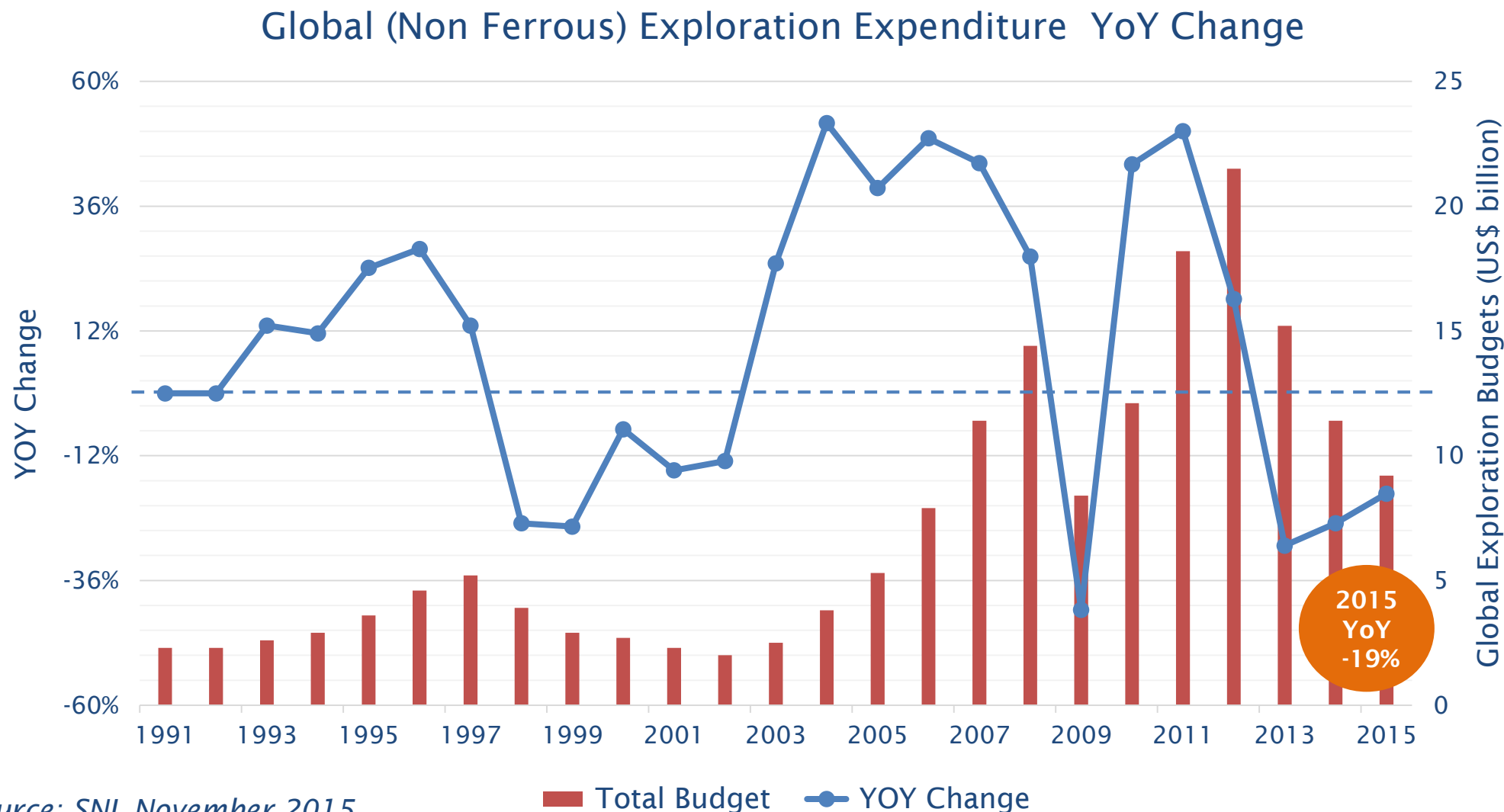


- Geographically Dispersed, Diversified, Multi Commodity TIC provider - Servicing the entire resource cycle
- Exploration, Resource Definition, Beneficiation, Optimization, Production, Trade

¹Company estimates

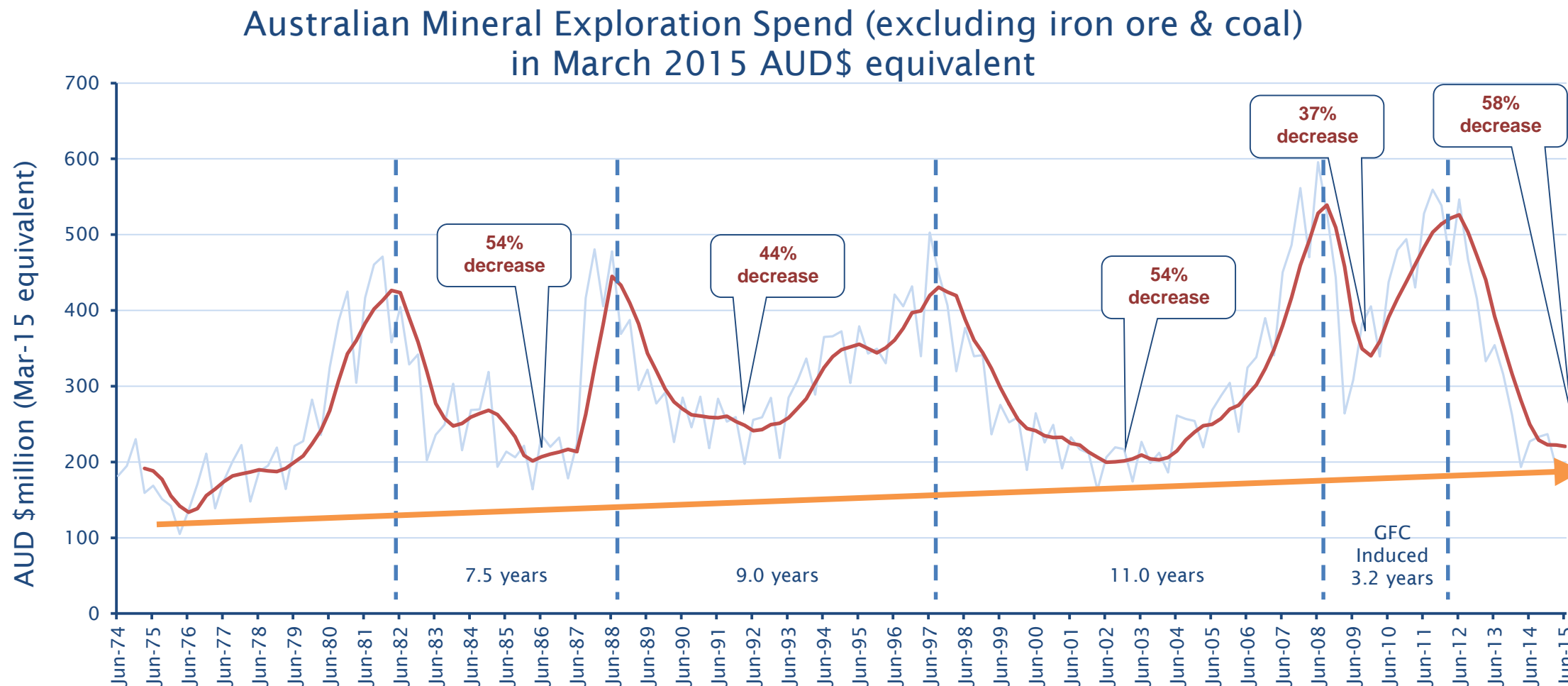


The Market – Global Exploration Expenditure



Source: SNL November 2015

The Market - Mineral Cycles (Australia as a proxy)

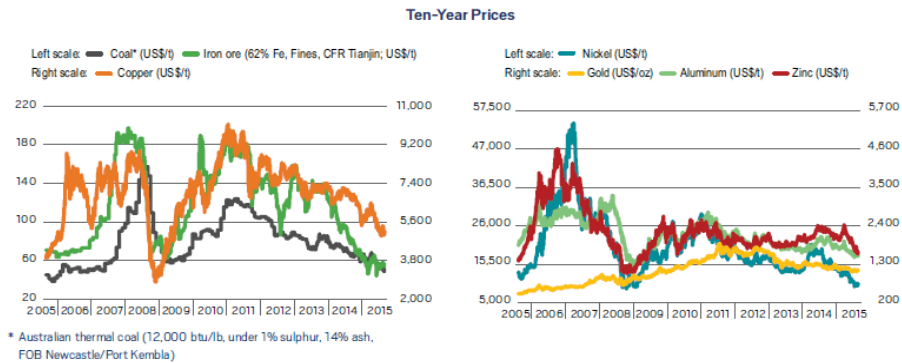


Source: Australian Bureau of Statistics

The Market - Commodity Prices /Reserves /Currency / Stock Levels

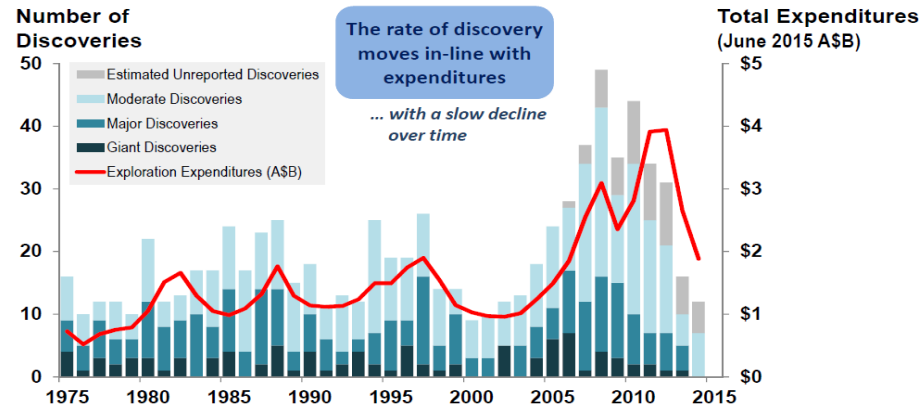


Commodity Prices



Reserves

Adjusted number of discoveries versus A\$ Spend
Australia: 1975-2014



Note: Excludes satellite deposits within existing Camps. Includes Bulk Mineral discoveries.
Analysis based on Moderate-, Major- and Giant-sized deposits

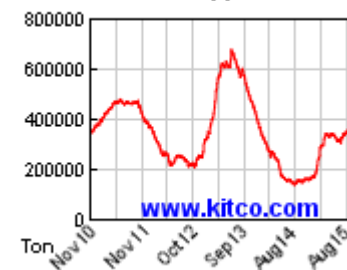
Source: MinEx Consulting © November 2015

Currency

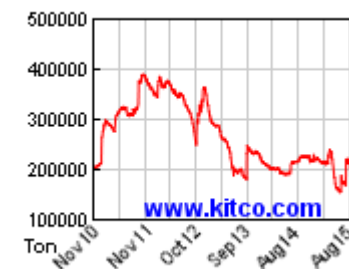


Stocks

5 Year LME Copper Stock



5 Year LME Lead Stock



5 Year LME Zinc Stock



Down Cycle Strategic Focus (unchanged)

- Cost Base Management
- Service Optimization
- Targeted Business Development in pursuit of Market Share Growth

.....Without compromising Market Proposition

Sustaining Strategic Focus

- Pursue Technical Leadership/Service Innovation
- Multi Commodity Coverage/Diversification
- No Geographic Barriers
- Low Cost Producer

The Hub and Spoke Model in Action



Cost Base Management - Hub & Spoke Tuning



- Consolidation of Expertise
- Economies of Scale



• Load	Mothballed or Closed (12)		Restricted Scope (10)		Expand or New (5)
	Anchorage	Bucaramanga	Santiago	La Serena	2 x Sub Sahara
	Darwin	Bana	Johannesburg	Reno	1 x North Africa
• Turn	Stewart	Zouerate	Val D'Or	Adelaide	1 x Nordic Region
– Re	Bogota	Sydney	Medellin	Bamako	1 x UK
	Winnemucca	Maraba	Timmins	Mt Isa	
– Re	Georgetown	Auezov Town			
– Overtime ban					
– Contract Labour ban					

Our Differentiators:

- Global LMS available in 31 Languages
- Courses developed in-house; customised for ALS
- Blended learning (classroom, webinar, eLearning)
- Focus areas: Leadership development, compliance training, HSE, communications, technical training

Lynda.com – external online courses

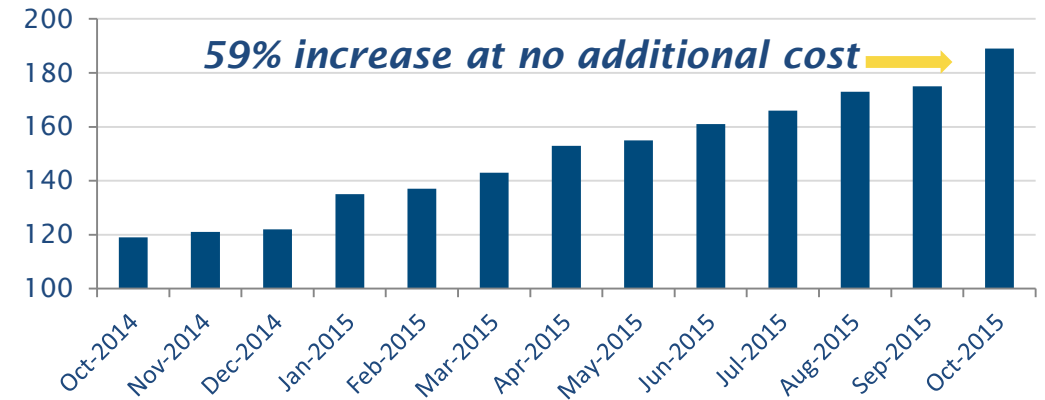
113

courses
accessed
(Sept Qtr)

4217

training videos
watched
(Sept Qtr)

Total Courses Available
(Produced in-house by ALS)



Internally Developed Courses

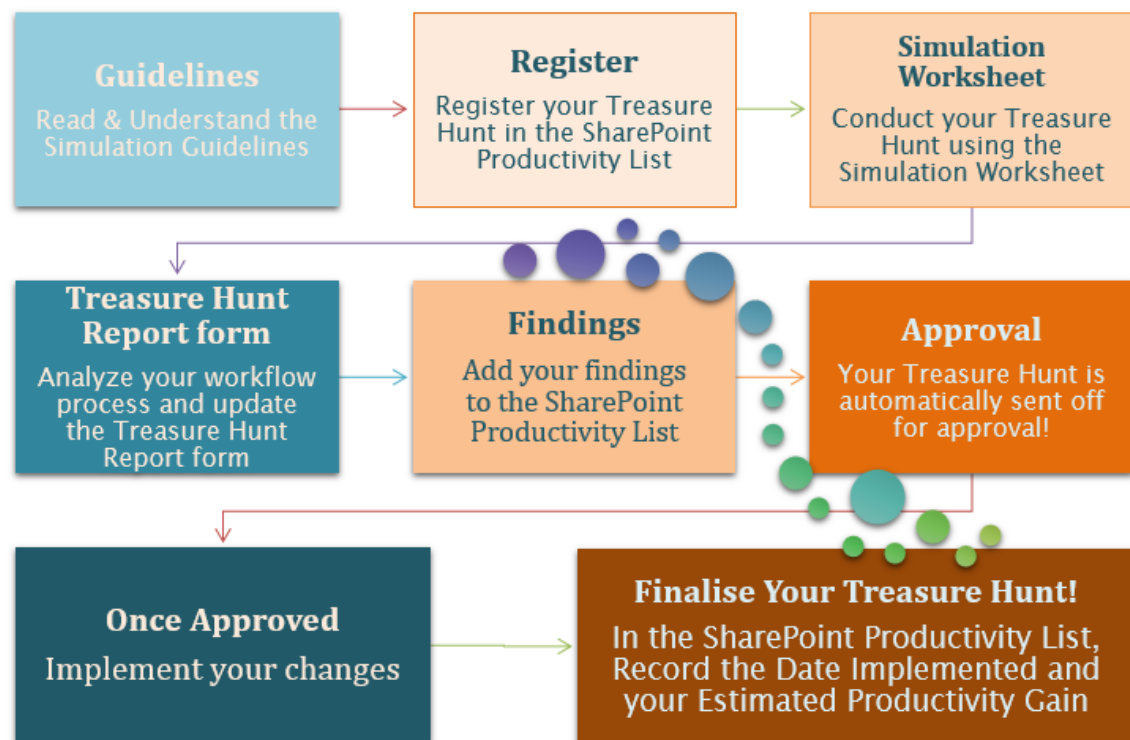
59%

increase in #
courses
developed in-
house (YoY)

459

Geochemistry
Technical
modules
completed
(in 18 mths)

Treasure Hunt Process



Geochemistry Productivity Initiative



Lisez ces documents en **français**

Lea estos documentos en **español**



View the
Productivity List



View the
Training Package

Geochemistry Productivity Snapshot

Register your Treasure Hunt

✓	Treasure Hunt Number	Section	Date Commenced	Productivity Gain (Estimated)
	Count= 78			

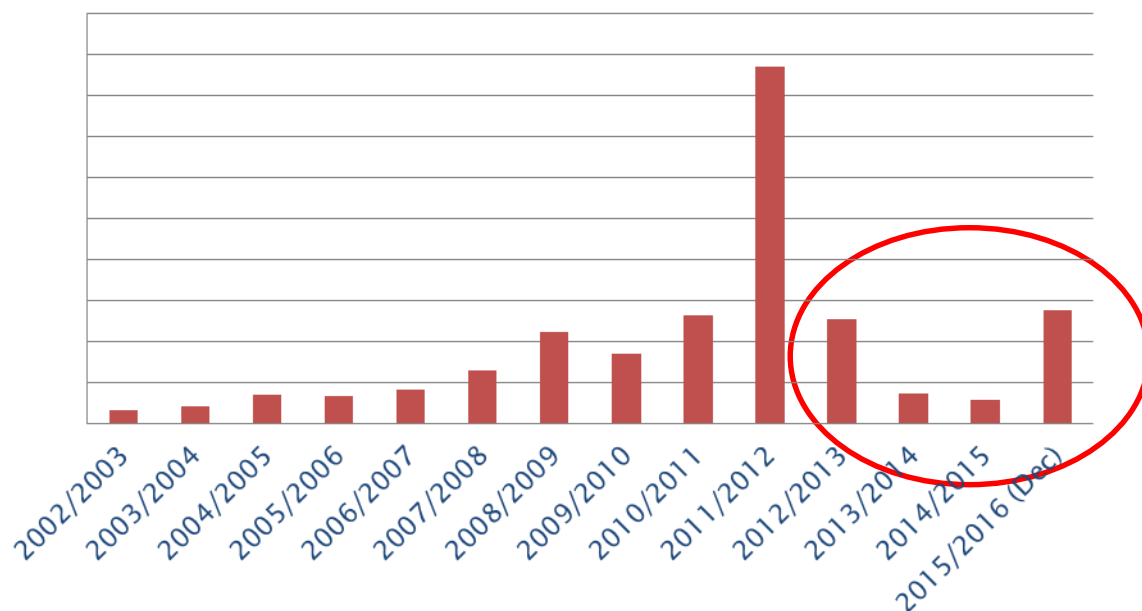
- Super Ultra Trace Analysis for Soils and Sediments
- Ionic Leach™
- Clay Fractionation
- Low Cost Lead Isotopic Analysis
- Low Cost Carbon and Oxygen Isotopes in Carbonates
- Hyperspectral Mineralogy
- Rapid Portable XRF Analysis
- Graphite Analysis
- Piloting capabilities

- 4 % Geochemistry Revenue
- 20 % Metallurgy Revenue

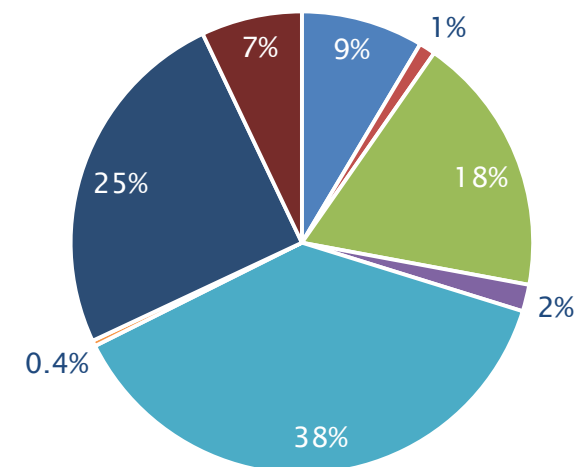
Service Optimization - Metallurgy Piloting Focus



Annual Invoicing from Pilot Plants



Pilot Revenue - Distribution By Type
2010-15



- Beneficiation
- Flotation
- Hydro Pilot
- Magnetic Separation
- Bulk HPGR
- HPAL and Crip Plant
- Jigging/Alflux
- SAG Mill

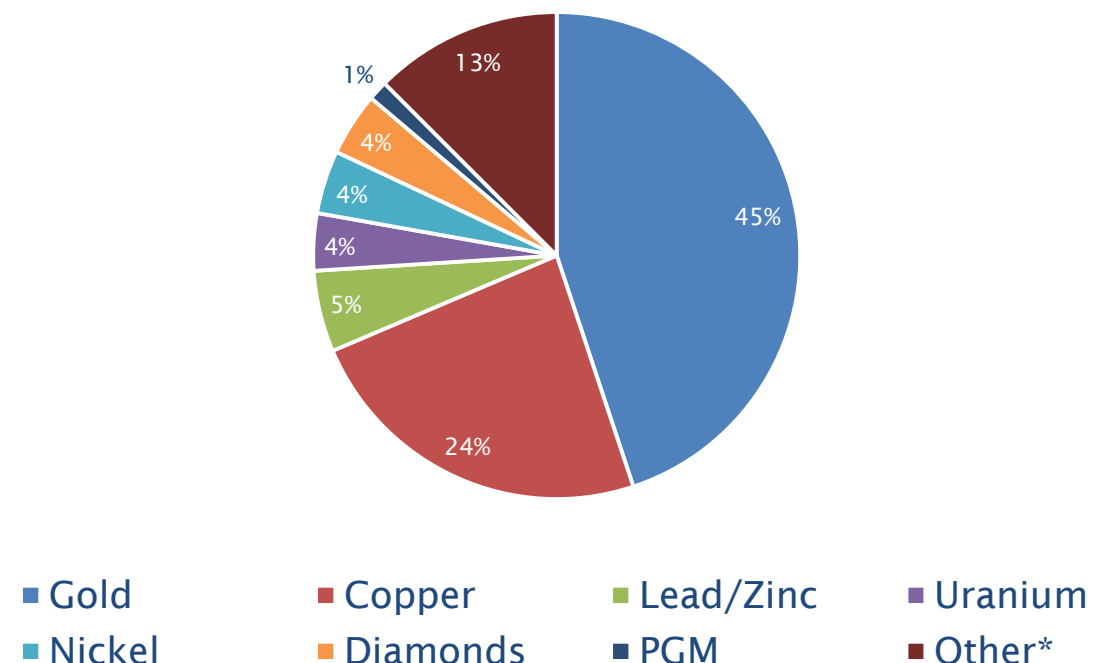
Service Optimization – Capability Alignment



Resource	Geochem Revenue	Met Revenue	Global Exploration Spend
Gold	43%	42%	45%
Copper	18%	33%	24%
Lead/Zinc	11%	2%	5%
Uranium	0.1%	1%	4%
Nickel	10%	1.6%	4%
Diamonds	N/A	N/A	4%
PGM	1.2%	<0.1%	1%
Iron	1%	7.5%	NR
Other ¹	16%	13%	13%

¹Other – Rare Earths, Graphite, Industrial Minerals

Worldwide Exploration Budgets by Target, 2015



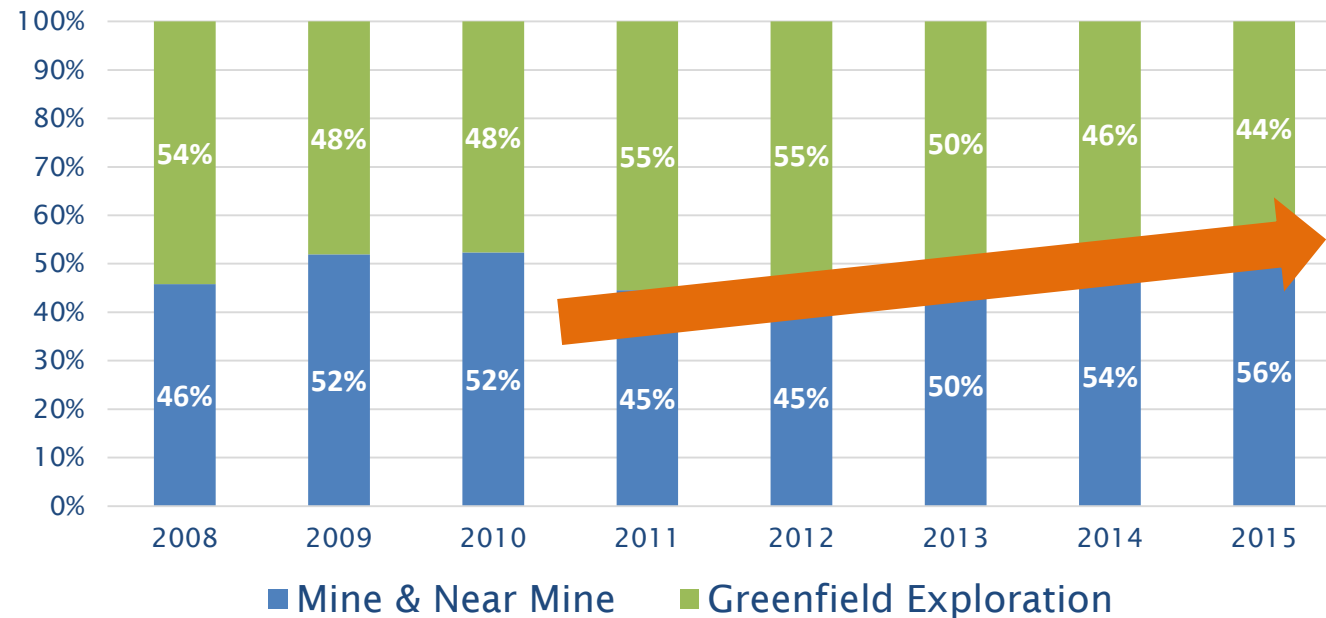
Exploration Spend Data from SNL Report Nov 2015

*Other – Excludes Iron Ore and Bauxite

Service Optimization – Mine related Exploration and Grade Control



Geochemistry Revenue Split



YoY Mine Site Rev +67%

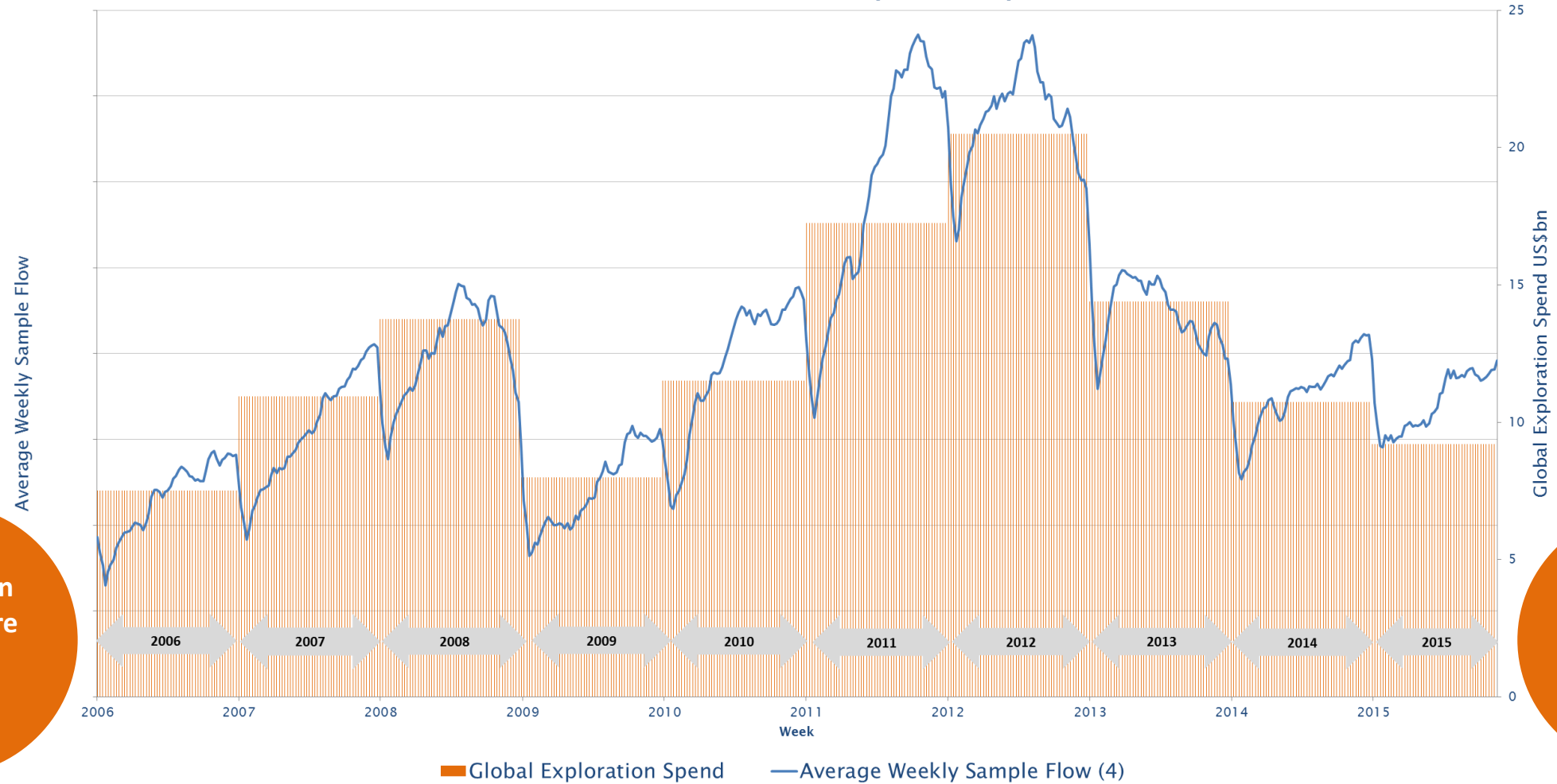
15 Active Sites
V
10 Last Year

Strong Project Pipeline

Market Share – Geochemistry Sample Flow



Global Geochemistry Sample Flow (trailing 4 week running average)
and Global Exploration Spend



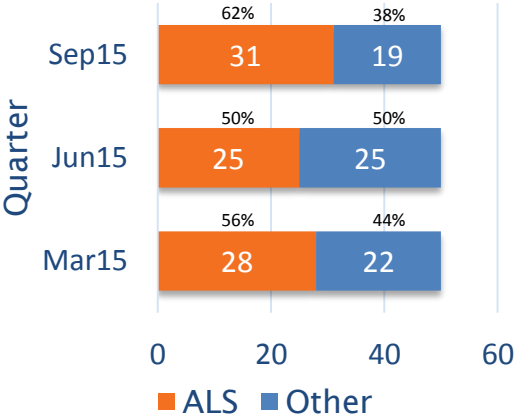
Global
Exploration
Expenditure
in USD
Down
19% YoY

ALS
Geochemistry
Sample Flow
Down
1% YoY

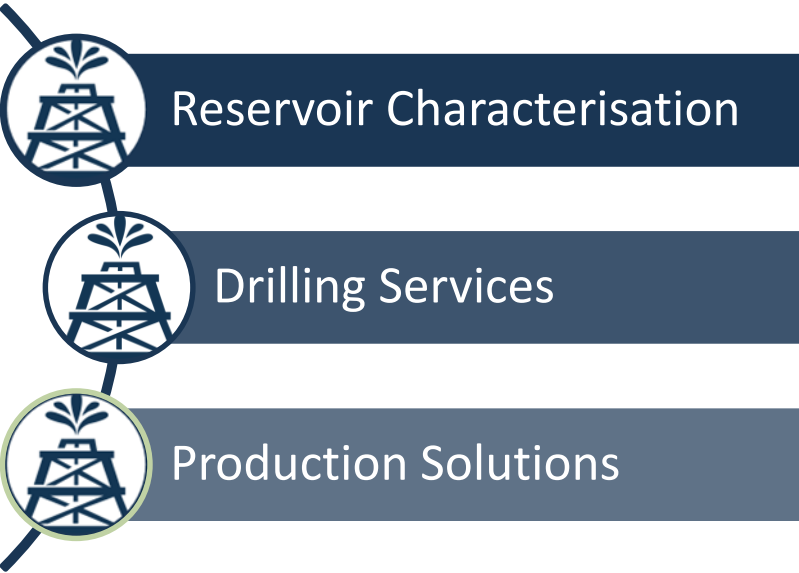
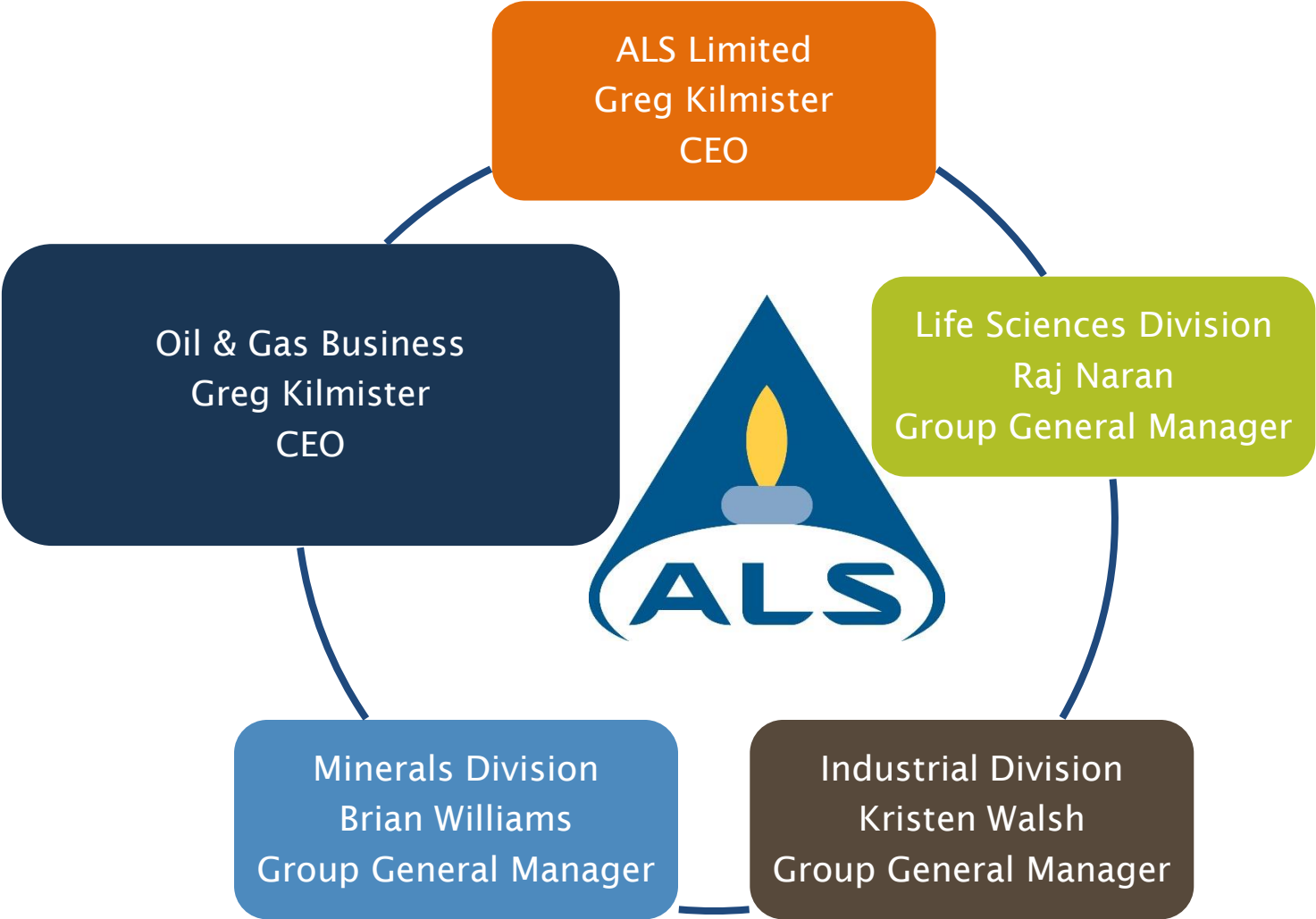
Geochemistry – Market share leveraged to upturn

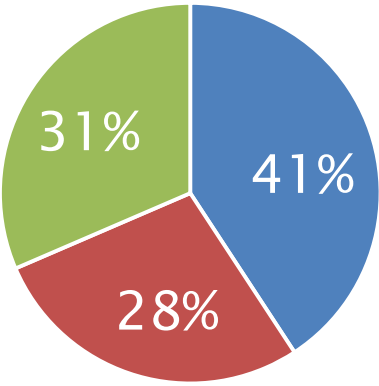
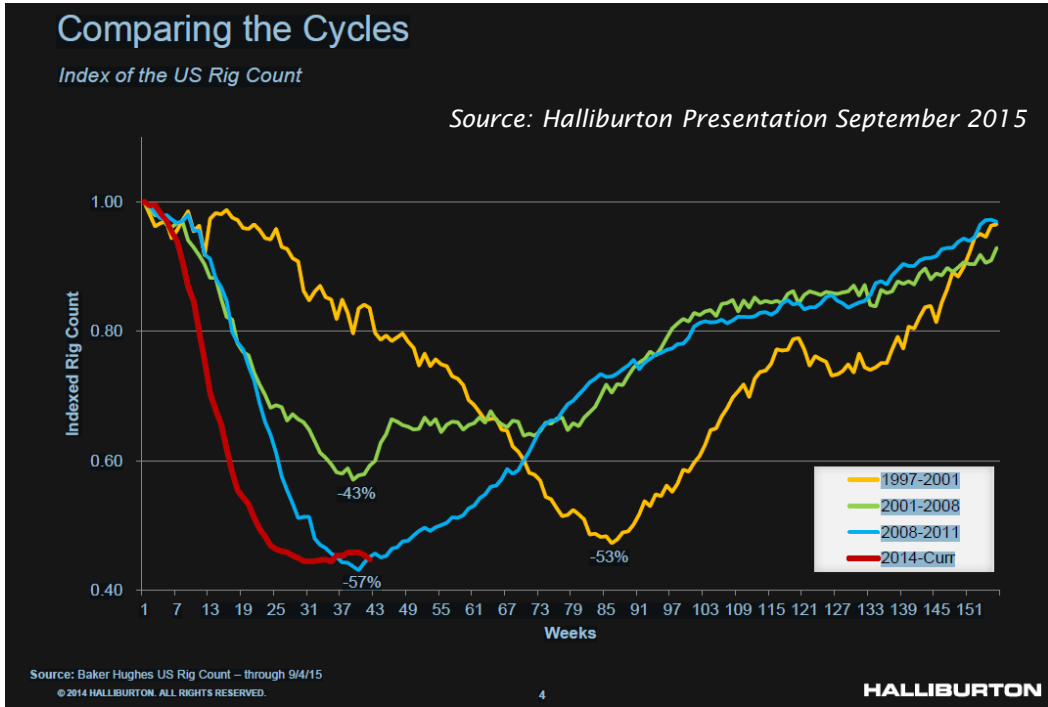
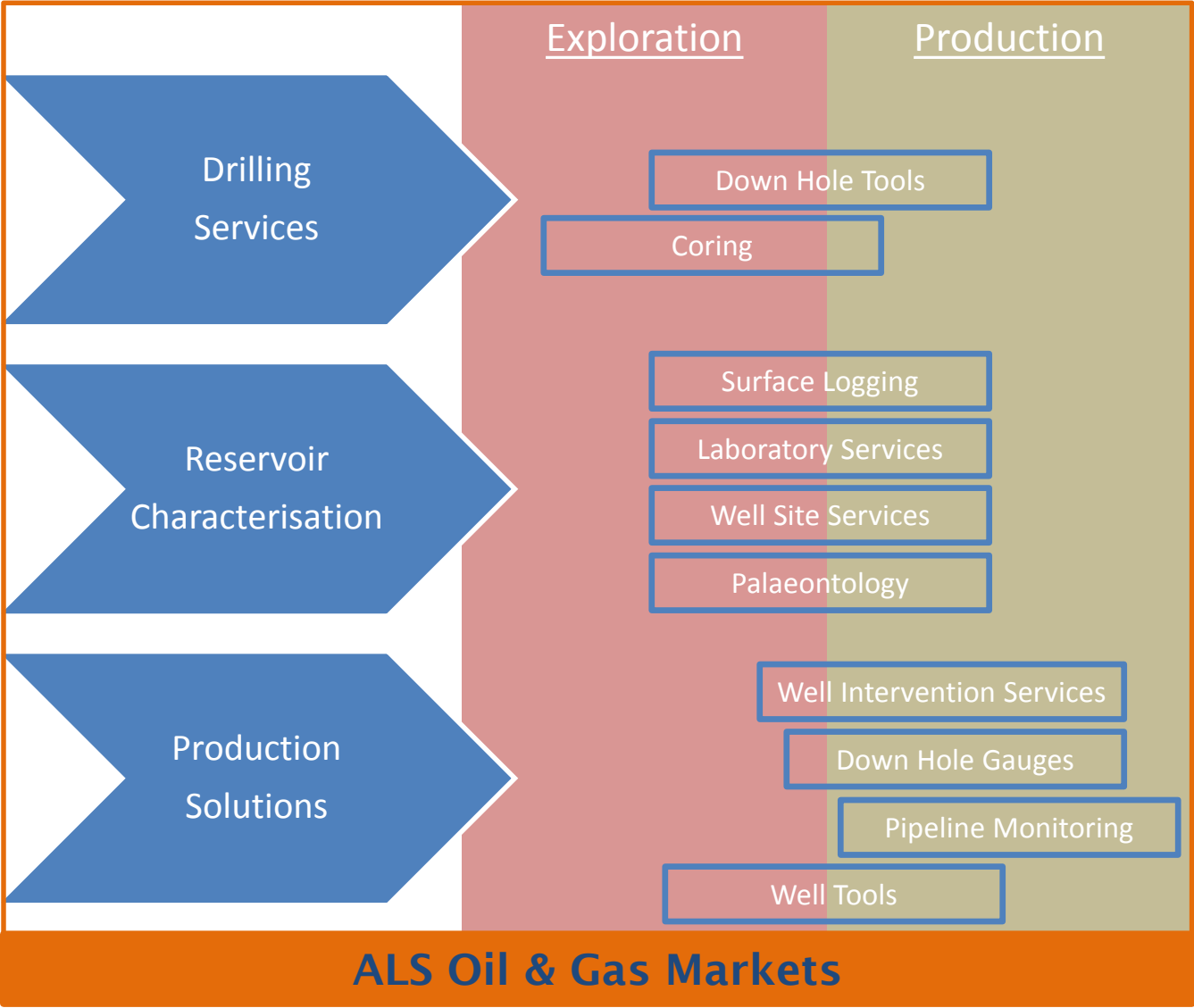


Laboratory Service Provider used for SNL Top Ranked Assay Drill Intersection Announcements



Source: SNL Top 10 Ranked Assay Targets for Copper, Gold, Lead, Silver and Zinc published in Quarterly SOTM reports (2015). 50 Targets in total per quarter





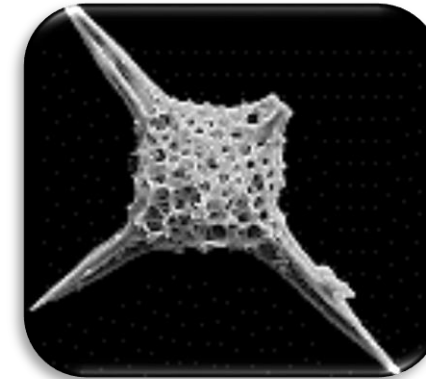
ALS Revenue Stream YTD

- Drilling Services
- Reservoir Characterisation
- Production Solutions

Reservoir Laboratories Overview



- The upstream oil & gas laboratory market is split into two tiers:
 - three global oilfield specialists
 - many technical niche and geographically limited labs
- The industry is not totally satisfied with these options due to TAT, pricing, & transparency
- Room exists for a new participant to leverage differentiating technologies and systems to meet the industry needs



Reservoir Laboratories Strategy



Leverage unique opportunities to take possession of samples

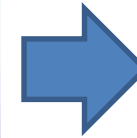
Core



Fresh core from ALS O&G Coring or direct engagement with clients and legacy core currently in storage.



Provide a distinctive value proposition through key technical differentiators



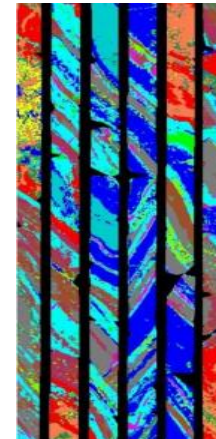
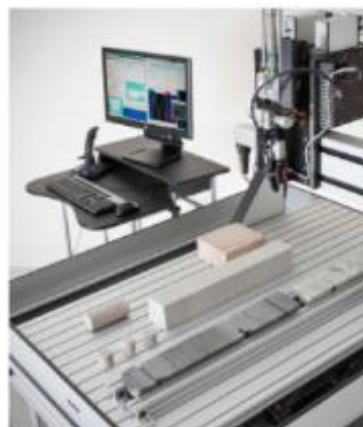
Demonstrate operational excellence and service quality



Cuttings



Fresh cuttings from ALS O&G Surface Logging or direct engagement with clients.



- LIMS
- Automation
- Standardization

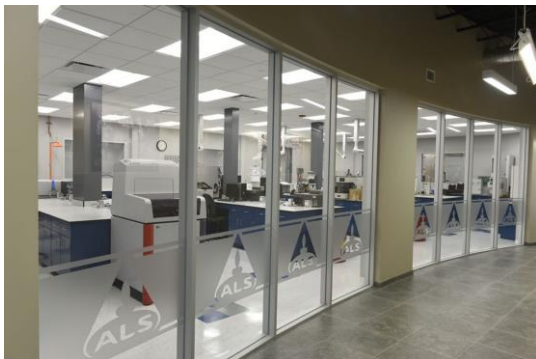
Oil & Gas Laboratory – Houston strategic asset



Houston Oil & Gas Laboratory officially opened November 2015 – USD\$13 million dollar investment

Comments received from +170 potential clients at opening:

- *Great facility and very good presentations*
- *Congratulations! I think you have great differentiators by using the whole suite of core data and very well interpreted by your team. Best of wishes for your success*
- *Impressive facility*
- *Several of my colleagues and I visited the facility, and would like to see ALS added as one of our vendors*
- *Good start for the lab and great potential for the facilities*
- *Very impressed with the technical personal in the different labs*
- *Excellent, informative event.*
- *May want to follow up on various services after we do our bid process for our upcoming wells*
- *I must say that I was floored by your company ...you guys are going to take a lot of work away from Weatherford and Core Lab*



Pipeline Monitoring – The costs of pipeline incidents in USA



	Incident Count		Fatalities		Injuries		Property Damage		2015 Year-To-Date
3 Year Average - (2012-2014)	285	3 Year Average	13	3 Year Average	65	3 Year Average	\$290,639,267	Incidents	237
5 Year Average - (2010-2014)	281	5 Year Average	14	5 Year Average	70	5 Year Average	\$582,467,980	Fatalities	5
10 Year Average - (2005-2014)	282	10 Year Average	14	10 Year Average	59	10 Year Average	\$542,522,295	Injuries	45
20 Year Average - (1995-2014)	280	20 Year Average	18	20 Year Average	68	20 Year Average	\$352,226,224	Property Damage	\$243,323,133

- \$243m property damage in 2015
- \$7bn property damage in 20yrs
- Around 280 incidents/yr
- 20 fatalities in 2014 (average 13)

PHMSA Pipeline Incidents: (1995-2014)
Incident Type: Significant System Type: ALL State: ALL

Calendar Year	Number	Fatalities	Injuries	Property Damage Current Year Dollars
1995	259	21	64	\$74,291,229
1996	301	53	127	\$160,065,297
1997	267	10	77	\$108,382,011
1998	295	21	81	\$171,394,251
1999	275	22	108	\$175,046,770
2000	290	38	81	\$253,056,430
2001	233	7	61	\$77,717,793
2002	258	12	49	\$125,139,262
2003	295	12	71	\$164,185,502
2004	309	23	56	\$310,022,995
2005	333	16	46	\$1,450,016,946
2006	257	19	34	\$155,251,632
2007	267	16	46	\$149,573,489
2008	278	8	54	\$580,381,948
2009	275	13	62	\$177,659,032
2010	263	19	103	\$1,602,282,547
2011	288	12	51	\$438,139,551
2012	251	10	54	\$228,389,550
2013	300	9	45	\$345,669,427
2014	305	19	95	\$297,858,823
Grand Total	5,599	360	1,365	\$7,044,524,486

Data Source: US DOT Pipeline and Hazardous Materials Safety Administration – 29th Oct 2015 data

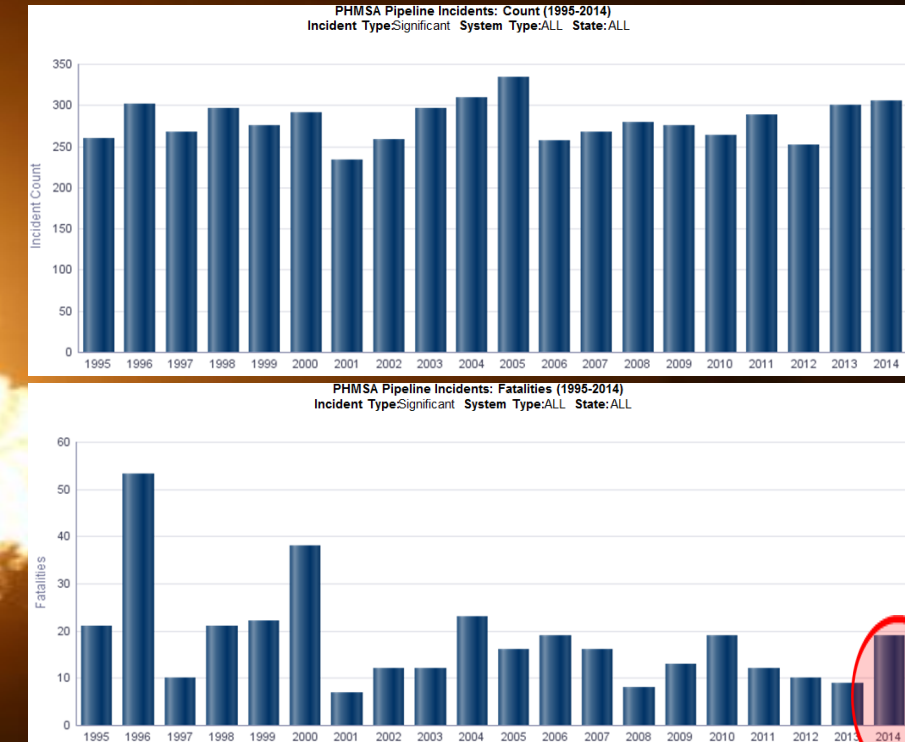
Pipeline Monitoring – The costs of pipeline incidents in USA



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Omega Pipeline Monitoring Services

- 33% Sales Revenue growth in 2015
- 41% growth in number of projects
- A swiftly growing ALS Production Solutions service
- Few 'service' competitors



Data Source: US DOT Pipeline and Hazardous Materials Safety Administration – 29th Oct 2015 data