

## Mining and Rock Excavation Technique



Atlas Copco Capital Markets Day, November 15, 2012  
Bob Fassl, Business Area President

*Sustainable Productivity*

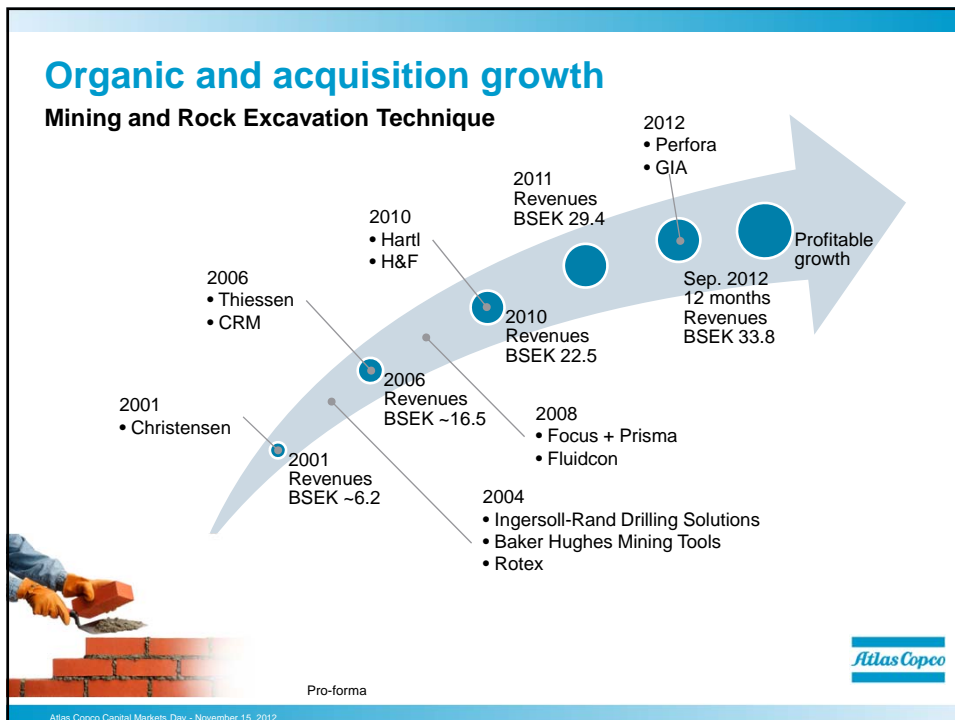


## Safety First!



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## More than 100 years experience



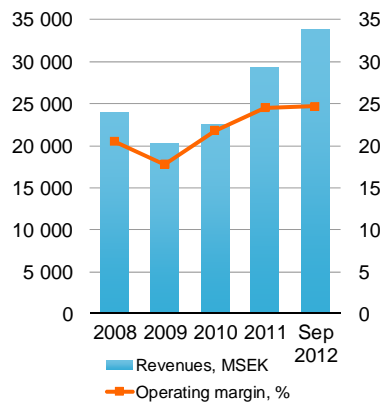
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## Mining and Rock Excavation Technique

### Today

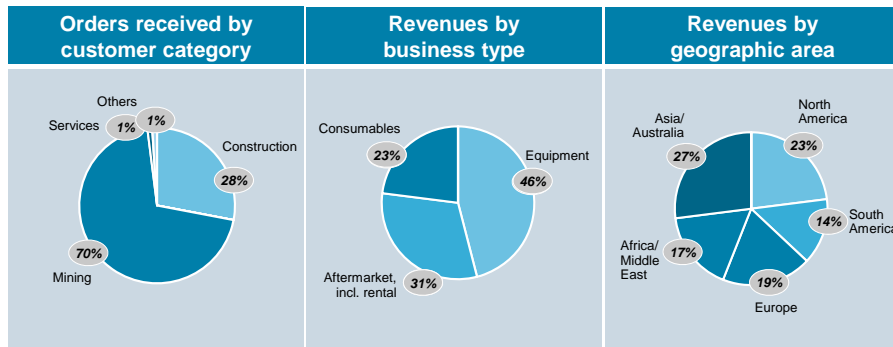
- Strong global market position
- Large aftermarket and consumables business
- A significant local presence in high growth emerging markets
- Customers rate Atlas Copco very high on product performance and reliability
- Stable and flexible organization and a strong management pool



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## Mining and Rock Excavation Technique



YTD September 2012

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## Capitalize on major trends



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## Mining

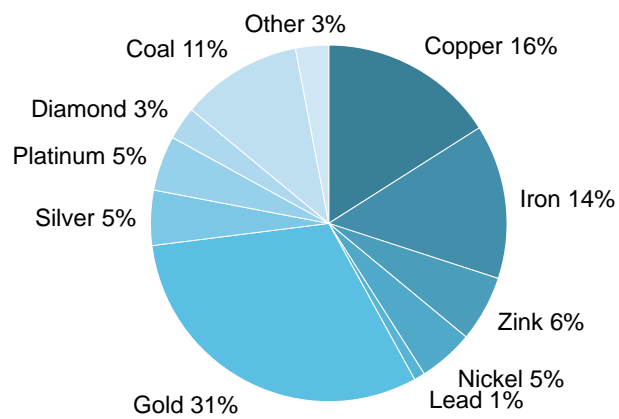


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## Mining

### Estimated exposure to minerals



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## Outlook / trends

### Mining

- Continued demand for minerals long term
  - Somewhat weaker short term
- Total cost of ownership and optimization of full value chain
  - Increased mechanization and more automation
  - Equipment availability
  - Energy and safety
- More underground, lower ore grades and remote locations
- Consolidation



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## Mechanical Rock Excavation

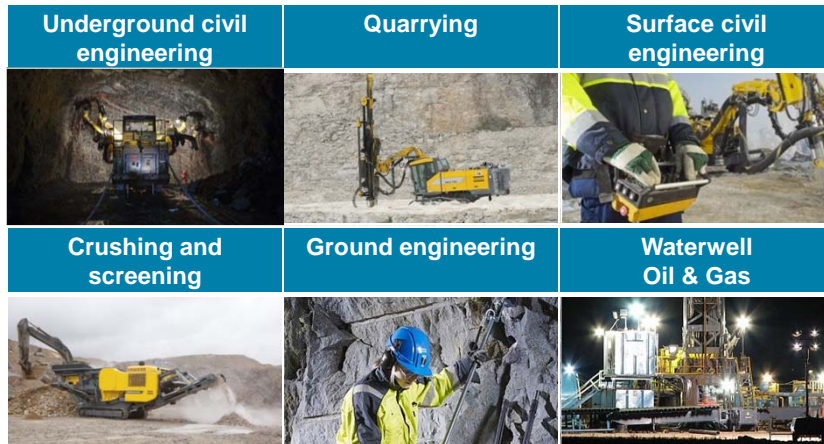


David Shellhammer  
Division President, Underground Rock Excavation

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## Civil engineering / construction



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## Outlook / trends

### Civil engineering / Infrastructure

- Investments in infrastructure
  - Tunneling
  - Hydropower plants
  - Road development
  - Geotechnical work



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## Priorities

<b>Innovation / Product development</b> 	<b>Aftermarket</b> 	<b>Presence</b> 
<b>Operational excellence</b> 	<b>Acquisitions</b> 	<b>People management</b> 



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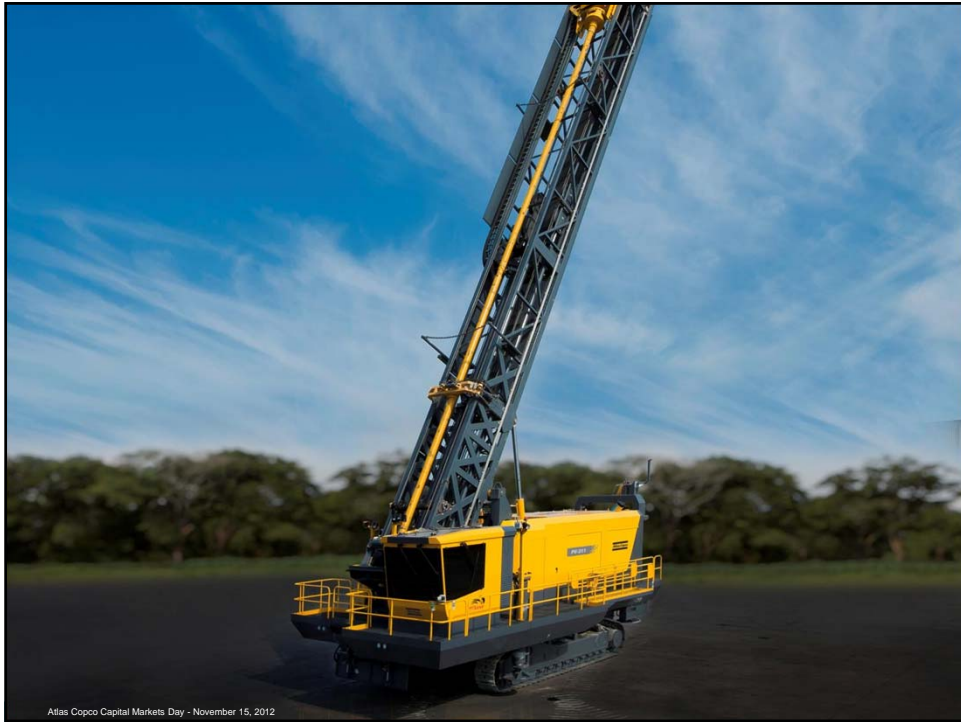
## Automation



Peter Salditt  
Division President, Drilling Solutions

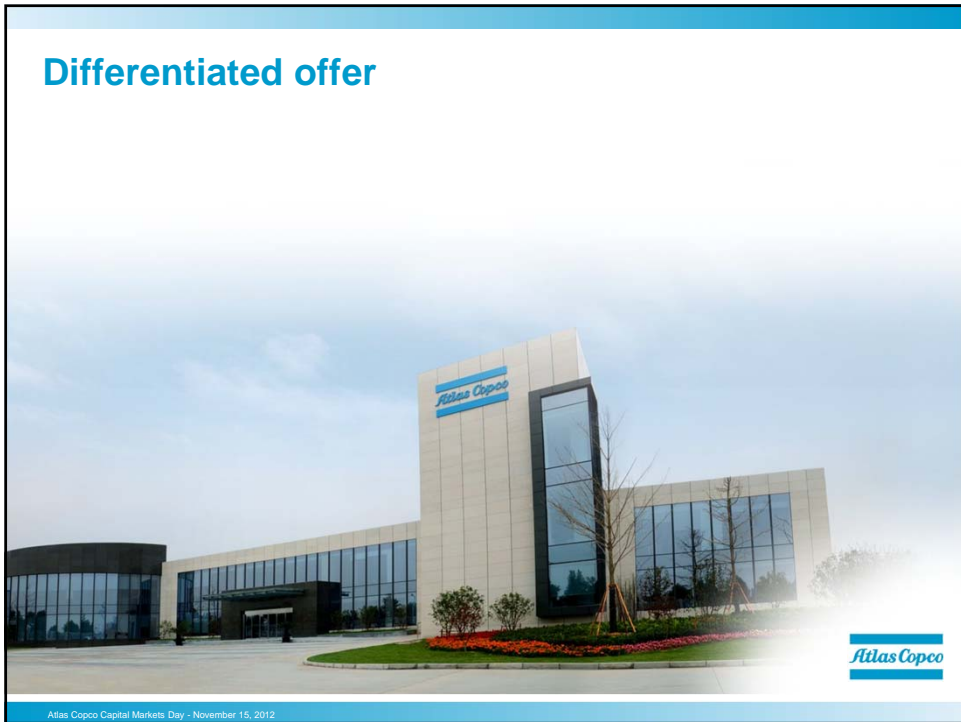
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## Differentiated offer



## Meeting the demands for surface drilling in China



Markku Teräsvasara  
Division President, Surface Drilling

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## Atlas Copco Service



Andreas Malmberg  
Division President, Mining and Rock Excavation Service

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## Adding value through drilling consumables contracts

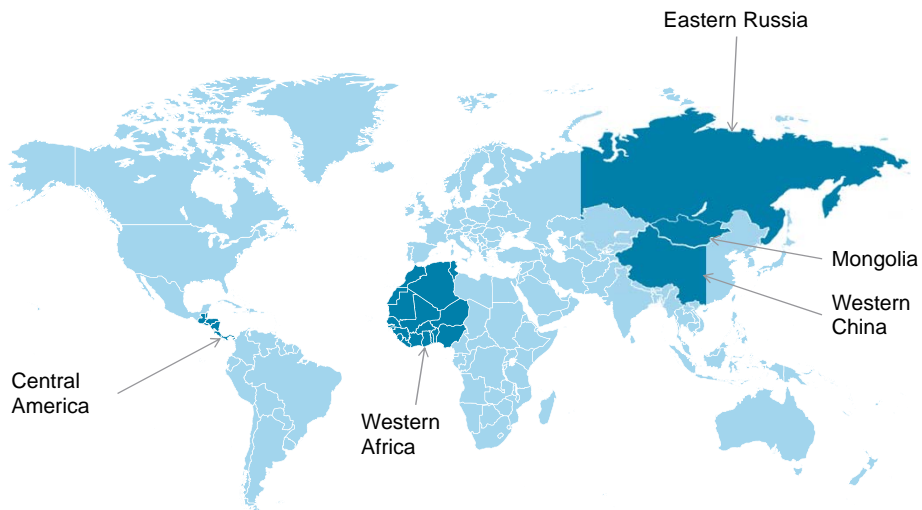


Johan Halling  
Division President, Rock Drilling Tools

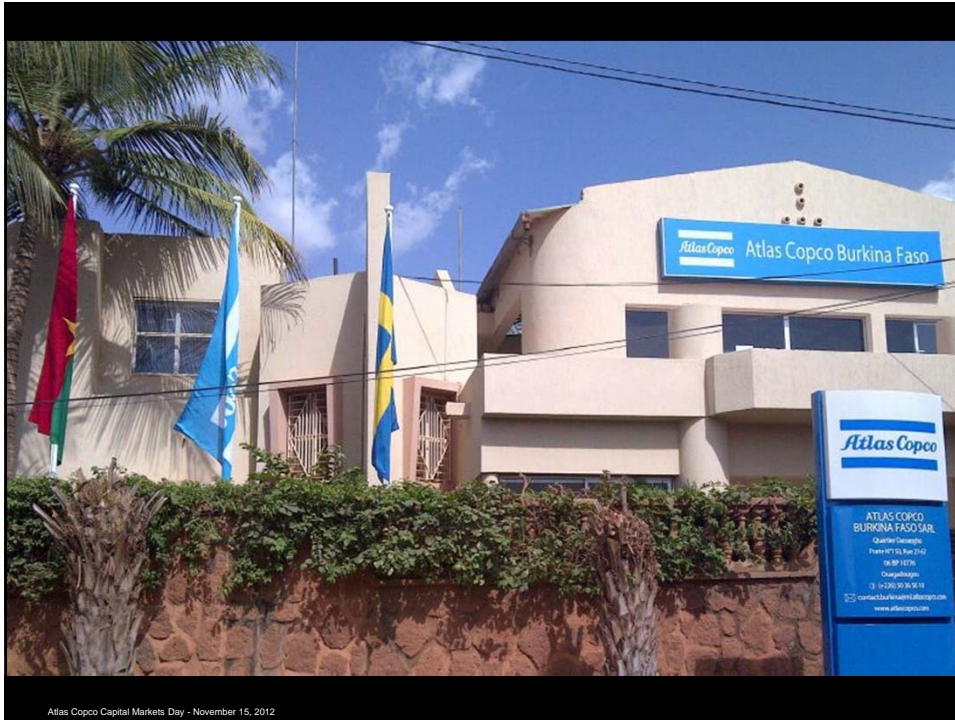
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## Examples of new presence



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## Operational excellence

- Increase equipment availability through excellent service
- Reduce lead time in manufacturing
- Working capital efficiency



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## Acquisitions

- Extending the offer
- Increase presence and penetration in the market



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## Dimensional stone industry

### Acquisition of Perfora



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## Utility vehicles

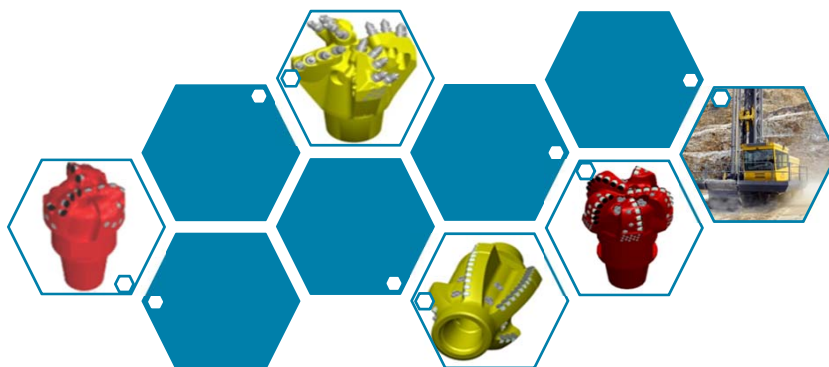
Acquisition of GIA



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## Drill bits

Acquisition of Newtech



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**Committed to  
sustainable productivity.**



