SHAWCOR

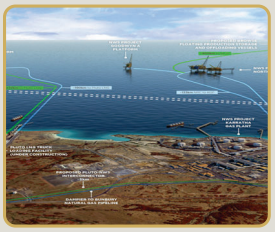
# PIPELINE & PIPE SERVICES

# PIPELINE PERFORMANCE

## MARKET DRIVERS

| | | |
|---|---|---|
| ENERGY TRANSITION FROM COAL TO GAS | → | LARGE PIPELINES FEEDING LNG |
| LOWER COST OFFSHORE DEVELOPMENT | → | SUBSEA TIEBACKS AND GREENFIELD DEVELOPMENTS |
| GROWING EPCI DEVELOPMENT MODEL | → | PARTNERSHIPS WITH EPC CONTRACTORS |
| CHALLENGING DEEP WATER FIELDS | → | REQUIRES TECHNOLOGY |
| AGING INFRASTRUCTURE | → | REHABILITATION PRODUCTS |
| NEW O&G SUPPLY SOURCES | → | REALIGNMENT OF CAPACITY TO MARKET STRATEGY |

## MARKET OPPORTUNITIES



GROWTH IN LNG SUPPLY CHAIN



COLLABORATIVE SUBSEA TECHNOLOGY DEVELOPMENT



DYNAMIC GLOBAL SUPPLY AND DEMAND

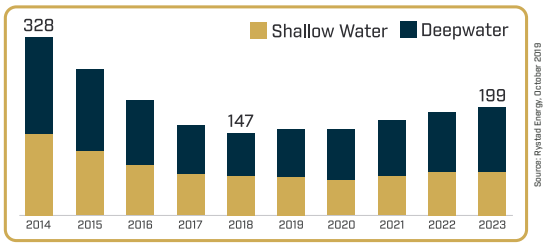



ASSET LIFECYCLE MANAGEMENT

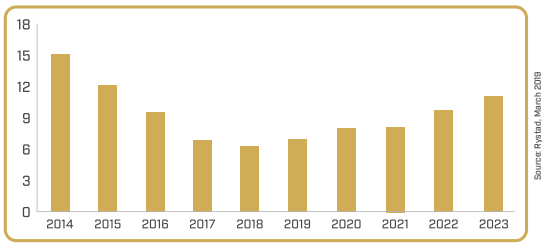


DOMESTIC ENERGY PROGRAMS & CONSUMPTION

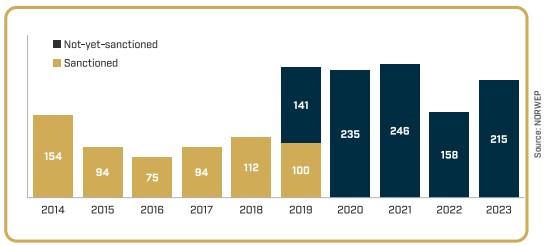
## INDICATORS TO WATCH



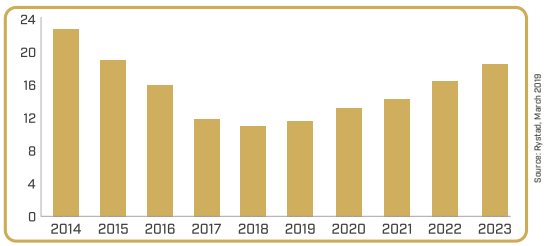

E&P OFFSHORE CAPEX




SUBSEA EQUIPMENT CAPEX



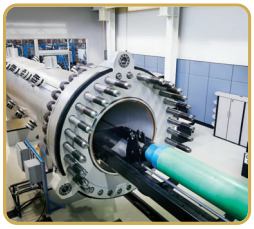

FID PROJECT SANCTIONS




SURF CAPEX

# PIPELINE PERFORMANCE

## PRODUCT/SERVICE OFFERING



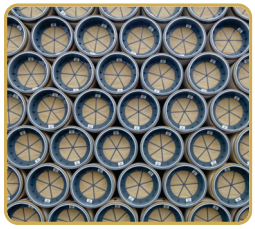
FLOW ASSURANCE



PROTECTIVE & WEIGHT COATINGS



FIELD JOINT COATINGS



PROTECTION & PRESERVATION PRODUCTS



ENHANCED LOGISTIC SOLUTIONS

## DIFFERENTIATION

- CUSTOMER RELATIONSHIPS
- TECHNOLOGY & INNOVATION
- GLOBAL FOOTPRINT
- PROVEN TRACK RECORD
- DIGITAL CAPABILITIES

## KEY CUSTOMERS

OPERATORS: Chevron, Shell, ExxonMobil, woodside, bp, PEMEX, PETRONAS

EPCs: SAIPEM, Allseas, TechnipFMC, MCDERMOTT TECHNOLOGY, subsea 7

PIPE MILLS: vallourec, Sumitomo Corporation, Tenaris, EUROPIPE

## MAIN COMPETITORS

PROJECTS: wasco, Tenaris, BAYOU, EUPEC PIPE COATINGS, PERMA-PIPE, INDAL STEEL PIPE

PRODUCTS: SEALFORLIFE Industries, Denso, TRENTON, 3M, ROSEN, ESSENTRA COMPONENTS

# INTEGRITY MANAGEMENT

## MARKET DRIVERS

| | | |
|---|---|---|
| AGING INFRASTRUCTURE | → | PIPELINE REHABILITATION |
| REGULATORY ENVIRONMENT | → | INTEGRITY SERVICES |
| US PIPELINE CAPACITY CONSTRAINTS | → | PIPELINE CONSTRUCTION PROJECTS |
| US LAND – SHALE | → | INFRASTRUCTURE BUILDOUT |
| UK DEFENSE & INDUSTRIAL SPENDING | → | EXPANSION BEYOND OIL & GAS |

## MARKET OPPORTUNITIES



BUILD A BRAND IN PIPELINE INTEGRITY



NDT TECHNOLOGY ADVANCEMENT

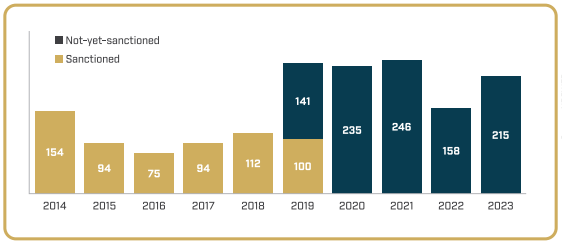


PIPELINE REHABILITATION

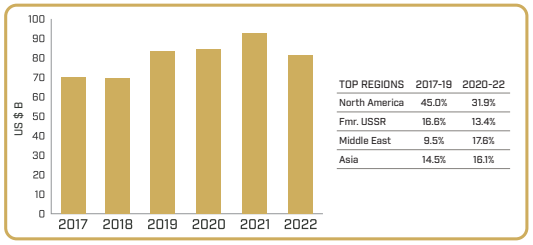


EXPANSION BEYOND OIL & GAS

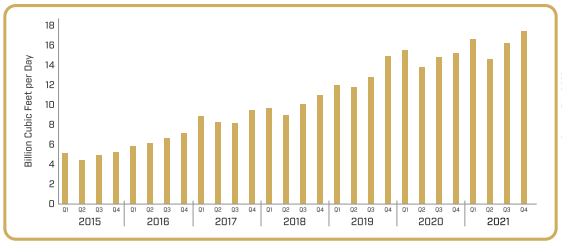
## INDICATORS TO WATCH



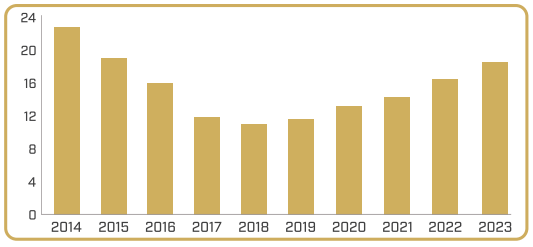

FID PROJECT SANCTIONS




GLOBAL PIPELINE CAPEX SPEND




LNG US EXPORT




SURF CAPEX

# INTEGRITY MANAGEMENT

## PRODUCT/SERVICE OFFERING



CONVENTIONAL NDT SERVICES



ADVANCED NDT SERVICES (AUT & RTR)



COMPUTED RADIOGRAPHY



iLINE – WELD ADVISOR



CUSTOMIZED SYSTEMS

## DIFFERENTIATION

- CUSTOMER RELATIONSHIPS
- TECHNOLOGY & INNOVATION
- INDUSTRY EXPERTS
- SERVICE EXCELLENCE
- DIGITAL SOLUTIONS

## KEY CUSTOMERS

OWNER/OPERATORS | ONEOK | EPIC | TARGA | ENBRIDGE Petroleum Exchange

CONTRACTORS | Allseas | SAIPEM | PRECISION PIPELINE | PUMPCO PIPELINE CONSTRUCTION

## MAIN COMPETITORS

MISTRAS | ACUREN | Applus+ | TEAM | STANLEY

# MANAGEMENT & ENGINEERING SERVICES

## MARKET DRIVERS

| | | |
|---|---|---|
| AGING WORKFORCE | → | EMBEDDED EMPLOYEES |
| AGING INFRASTRUCTURE | → | REHABILITATION AND REPLACEMENT |
| REGULATORY REQUIREMENTS | → | COMPLIANCE SERVICES |
| STRICTER EMISSION STANDARDS | → | DESIGN SERVICES |

## MARKET OPPORTUNITIES



ASSET OWNERSHIP PROGRAMS



NEW INFRASTRUCTURE



INTEGRITY SERVICES

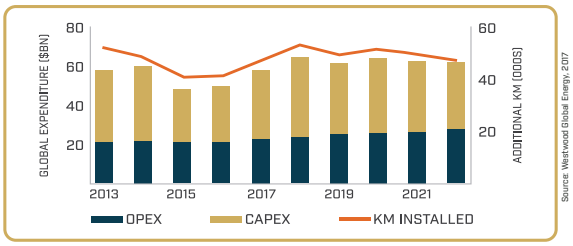


CLEAN ENERGY

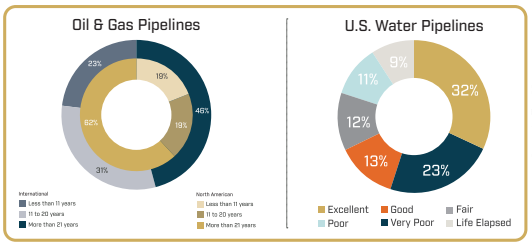


NON-PIPELINE INFRASTRUCTURE

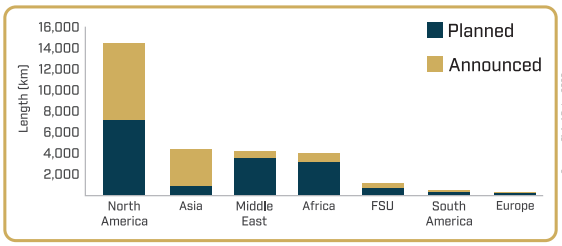
## INDICATORS TO WATCH



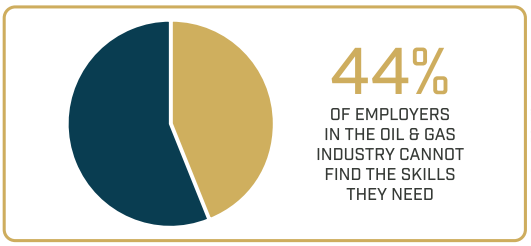

ONSHORE PIPELINE AND CAPEX




AGING INFRASTRUCTURE




NEW PIPELINES (2019-2023)




SKILLED WORKERS

# MANAGEMENT & ENGINEERING SERVICES

## SERVICE OFFERING



CATHODIC PROTECTION



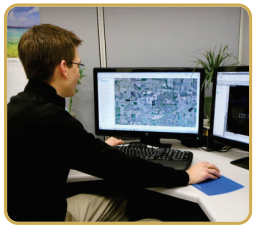
ASSET INTEGRITY MANAGEMENT



ENGINEERING SERVICES



INSPECTION SERVICES



EMBEDDED TECHNICAL EXPERTISE

## DIFFERENTIATION

- CUSTOMER RELATIONSHIPS
- TECHNICAL EXPERTISE
- PROVEN TRACK RECORD
- PROJECT MANAGEMENT
- DIGITAL CAPABILITIES

## KEY CUSTOMERS

ENBRIDGE

Husky Energy

Williams

Consumers Energy
Count on Us®

Northern Natural Gas

CNX
Midstream Partners LP

WWM
WHITEWATER MIDSTREAM

TC Energy

## MAIN COMPETITORS

ENengineering®

BURNS McDONNELL

Stantec

MOTT MACDONALD

BARR

corrpro®

mears
A QUANTA SERVICES COMPANY

SHAWCOR

# COMPOSITE SYSTEMS

# COMPOSITE PIPES & TANKS

## MARKET DRIVERS

| | | |
|---|---|---|
| ADOPTION OF COMPOSITE TECHNOLOGIES | → | CONVERSION OF CONCRETE/STEEL |
| AGING PIPE AND TANK INFRASTRUCTURE | → | ASSET REPLACEMENT AND REFURBISHMENT |
| INCREASING OIL & GAS PRODUCTION COMPLEXITY | → | EXPANDING THE OPERATING ENVELOPE |
| NA ECONOMIC AND CONSTRUCTION ACTIVITY | → | GROWTH IN WATER/FUEL MARKETS FOR TANKS |
| GLOBAL ENVIRONMENTAL REGULATIONS & ESG FOCUS | → | DEMAND FOR CORROSION-FREE SOLUTIONS |

## MARKET OPPORTUNITIES



LARGER DIAMETER PIPE PLATFORM



INTERNATIONAL EXPANSION



ASSET REPLACEMENT & REFURBISHMENT

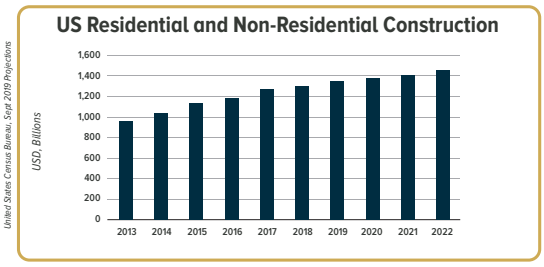


STORMWATER & WASTEWATER TREATMENT

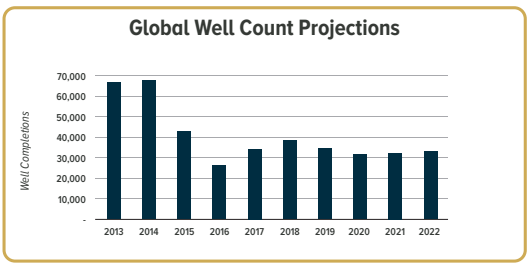


MIDSTREAM OIL & GAS SOLUTIONS

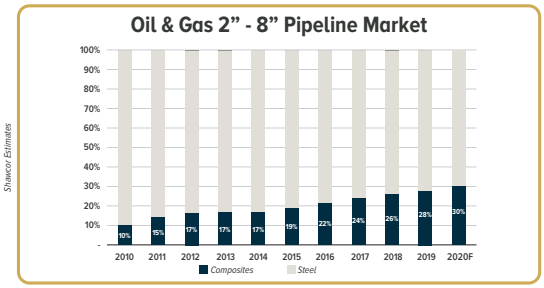
## INDICATORS TO WATCH



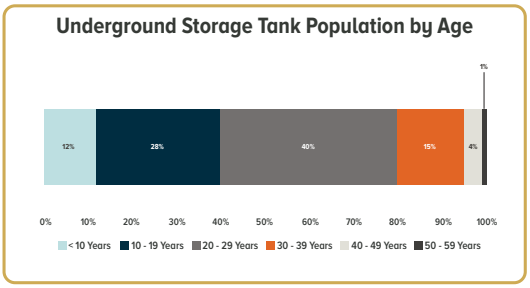

CONSTRUCTION ACTIVITY




OIL & GAS DRILLING ACTIVITY




COMPOSITE ADOPTION




AGING INFRASTRUCTURE

# COMPOSITE PIPES & TANKS

## PRODUCT & SERVICE OFFERING



COMPOSITE TANKS



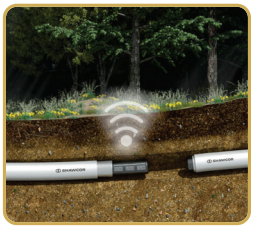
COMPOSITE PIPE



POLYETHYLENE PIPE



INSTALLATION & INTEGRITY SERVICES



DIGITAL ENABLEMENT

## DIFFERENTIATION

CUSTOMER RELATIONSHIPS

TECHNOLOGY & INNOVATION

APPLICATIONS ENGINEERING

STRONG VALUE PROPOSITION

DIGITAL CAPABILITIES

## KEY CUSTOMERS

Chevron

SUNCOR

7-ELEVEN

Crescent Point

NATIONAL ENERGY EQUIPMENT INC.

OXY

XTO ENERGY

## MAIN COMPETITORS

NOV

FLEXSTEEL

Oldcastle

SoluForce®

INFRAPIPE SOLUTIONS LTD.

# OILFIELD ASSET MANAGEMENT

## MARKET DRIVERS

| | | |
|---|---|---|
| MARKET ACCESS (PIPELINE CAPACITY/LNG TERMINALS) | → | INCREASED DRILLING/COMPLETIONS |
| INCREASED/ENHANCED RECOVERY TECHNIQUES | → | PRODUCT DIVERSIFICATION |
| WELL ABANDONMENT PROGRAMS | → | OCTG PIPE REFURBISHMENT |
| CUSTOMER INVESTMENT IN DIFFERENTIATED TECHNOLOGY | → | ASSET MANAGEMENT |
| COMMODITY PRICES | → | FOCUSED APPROACH TO GEOMARKETS |
| PRODUCTION CURTAILMENTS | → | IN-HOUSE CLEANING CAPABILITIES |

## MARKET OPPORTUNITIES



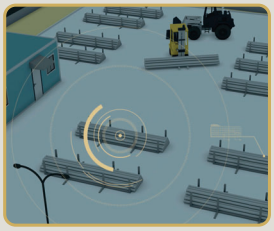
INCREASED DRILLING/ COMPLETIONS



GEOGRAPHIC FOCUS

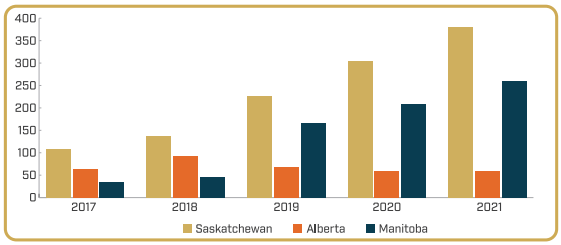


OCTG PIPE REFURBISHMENT

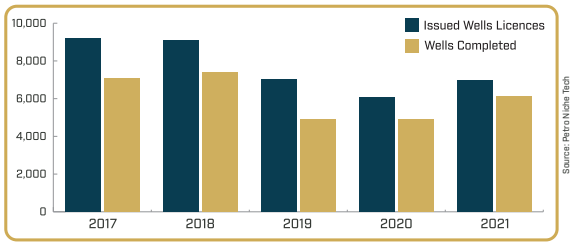


ASSET TRACKING & TRACEABILITY

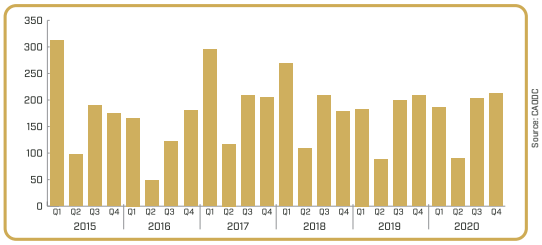
## INDICATORS TO WATCH




ACTIVE INJECTION WELL COUNT




NEW DRILLED WELL COUNT




CANADA AVERAGE RIG COUNT

# OILFIELD ASSET MANAGEMENT

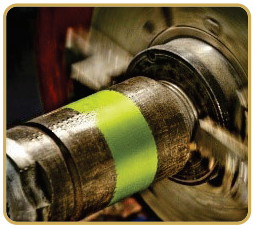
## PRODUCT/SERVICE OFFERING



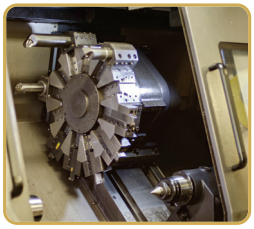
COMPOSITE LINED TUBING



SUCKER ROD INSPECTION & REPAIR



TUBULAR INSPECTION & REPAIR



PROPRIETARY THREADING / MACHINING



ASSET MANAGEMENT DIGITAL SERVICES

## DIFFERENTIATION

CUSTOMER RELATIONSHIPS

TECHNOLOGY & INNOVATION

REGIONAL FOOTPRINT

PRODUCT PORTFOLIO

DIGITAL CAPABILITIES

## KEY CUSTOMERS

Canadian Natural

Precision DRILLING

ENSIGN International Energy Services

Crescent Point ENERGY CORP

SEVEN GENERATIONS ENERGY

## MAIN COMPETITORS

NOV

Tenaris

FORCE INSPECTION SERVICES

Moore Pipe 2015 Inc.

POLYCORE TUBULAR LININGS A Subsidiary of Western Falcon Energy Services

SHAWCOR

# AUTOMOTIVE & INDUSTRIAL

# SHAWFLEX

## MARKET DRIVERS

| | | |
|---|---|---|
| NON-RESIDENTIAL INDUSTRIAL CONSTRUCTION | → | BROAD CATALOGUE |
| AGING INFRASTRUCTURE | → | SUBSTATION CONTROL CABLES |
| NA INFRASTRUCTURE PROJECTS | → | TRANSIT AND SPECIALTY CONTROL CABLES |
| CANDU NUCLEAR REFURBISHMENT PLANS | → | ENGINEERED TO ORDER CUSTOMIZED CABLES |
| RENEWABLE ENERGY | → | POWER CABLES |
| REGULATORY ENVIRONMENT | → | LOW SMOKE ZERO HALOGEN TECHNOLOGY |

## MARKET OPPORTUNITIES



CUSTOM CABLE ENGINEERING



FIRE SAFETY APPLICATIONS

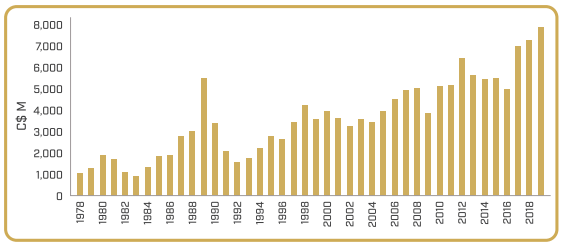


NUCLEAR ENERGY SOLUTIONS

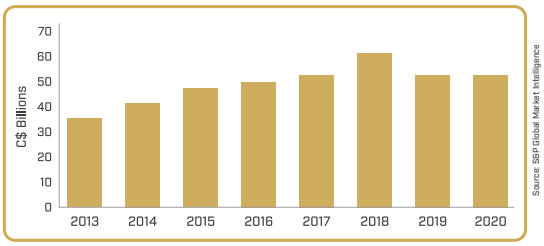


NA ELECTRICAL INFRASTRUCTURE

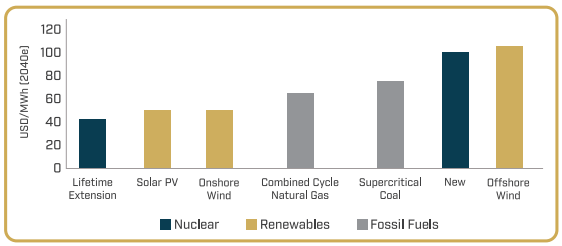
## INDICATORS TO WATCH



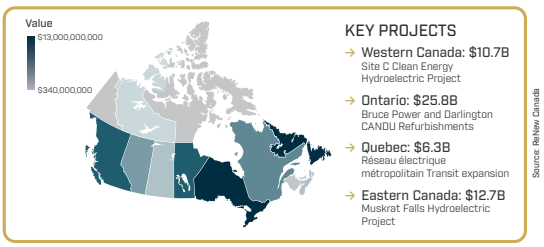

CANADIAN INDUSTRIAL PERMITS




US ELECTRICAL UTILITY TRANSMISSION & DISTRIBUTION CAPEX



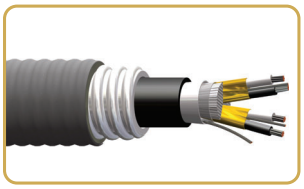

LEVELIZED COST OF ELECTRICITY



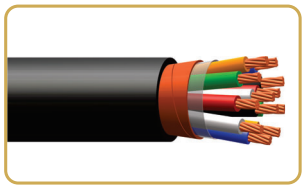

CANADA'S TOP 100 INFRASTRUCTURE PROJECTS

# SHAWFLEX

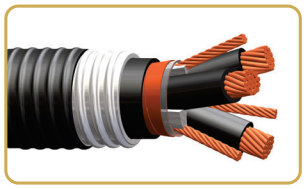
## PRODUCT/SERVICE OFFERING



INSTRUMENTATION CABLE



CONTROL CABLE



POWER CABLE



CUSTOM ENGINEERED WIRE AND CABLE

## DIFFERENTIATION

- CUSTOMER RELATIONSHIPS
- INDUSTRY EXPERTISE
- TECHNOLOGY & INNOVATION
- TRACK RECORD
- SERVICE EXCELLENCE

## KEY CUSTOMERS

ANIXTER, NORAMCO, REXEL ELECTRICAL SUPPLIES, SONEPAR, EVERSOURCE, NATIONAL GRID, HYDRO ONE, ONTARIO POWER GENERATION, BRUCE POWER, HYDRO QUÉBEC

## MAIN COMPETITORS

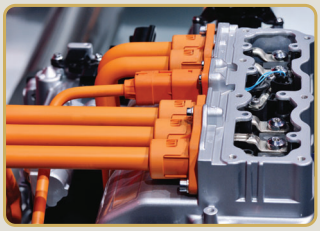
SOUTHWIRE, ECA CABLES, BELDEN, LAKE CABLE, ELECTRO CABLES INC., RSCC WORLD CLASS ENGINEERED CABLE

# DSG-CANUSA

## MARKET DRIVERS

| | | |
|---|---|---|
| GLOBAL AUTOMOTIVE PRODUCTION | → | GLOBAL SUPPLY CHAIN |
| ELECTRONIC CONTENT GROWTH | → | CUSTOMIZED PRODUCT SOLUTIONS |
| ELECTRIC VEHICLE ADOPTION RATE | → | NEW PLATFORMS AND PROGRAMS |
| AEROSPACE AND DEFENSE INVESTMENTS | → | INDUSTRIAL DIVERSIFICATION |
| CLEAN & SMART ENERGY PROJECTS | → | INVESTMENT IN ELECTRICAL INFRASTRUCTURE |

## MARKET OPPORTUNITIES



AUTOMOTIVE ELECTRONIC CONTENT GROWTH



ELECTRIC VEHICLES

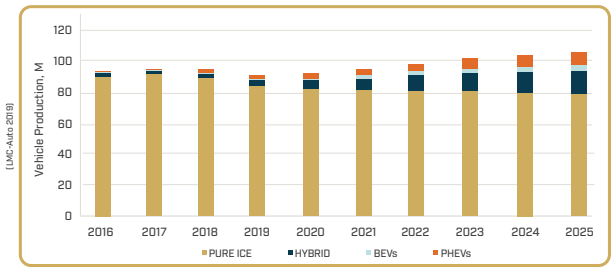


INDUSTRIAL DIVERSIFICATION

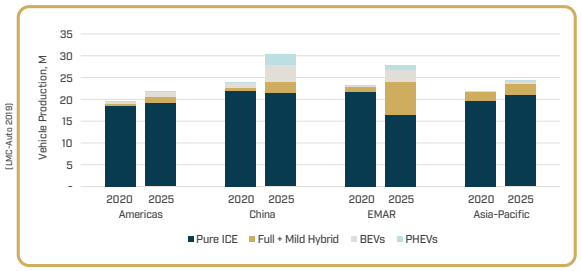


ELECTRICAL INFRASTRUCTURE

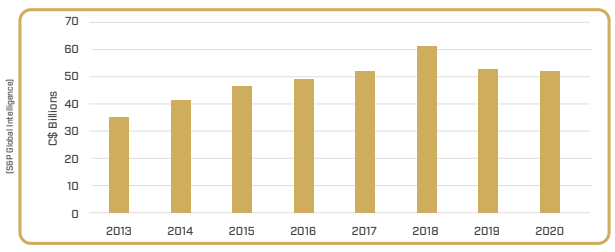
## INDICATORS TO WATCH



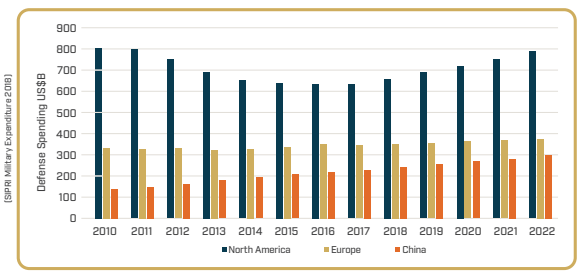

LIGHT VEHICLE PRODUCTION BY POWERTRAIN




LIGHT VEHICLE PRODUCTION BY REGION



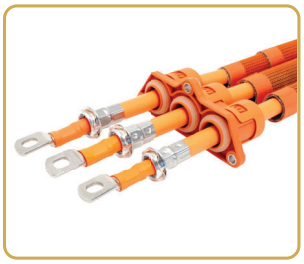

US ELECTRICAL UTILITY TRANSMISSION & DISTRIBUTION CAPEX




GLOBAL DEFENSE SPENDING

# DSG-CANUSA

## PRODUCT/SERVICE OFFERING



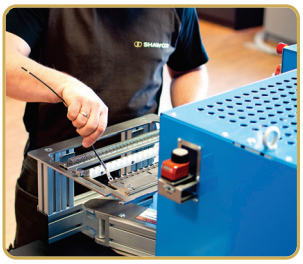
HEAT SHRINK TECHNOLOGY



COLD SHRINK TECHNOLOGY



APPLICATION EQUIPMENT



AFTERMARKET SALES & SERVICE

## DIFFERENTIATION

- CUSTOMER BASE
- APPLICATION ENGINEERING EXPERTISE
- INNOVATIVE TECHNOLOGY
- INTEGRATED SYSTEMS
- GLOBAL FOOTPRINT

## KEY CUSTOMERS

Tesla, BMW, Volkswagen, Yazaki, GM, Boeing, Aptiv, FCA Fiat Chrysler Automobiles, Airbus, ABB

## MAIN COMPETITORS

TE connectivity, Sumitomo Electric, Woer, 3M, LS Cable & System