



>> PERSPECTIVES_2012

THE FUTURE OF CHEMICAL AND PHARMACEUTICAL
PRODUCTION IN GERMANY

>> MANAGING SUSTAINABLE DEVELOPMENT.

A SITE MANAGERS PERSPECTIVE ON CURRENT AND FUTURE REALITIES

Dr. Roland Mohr
Infraserv GmbH & Co. Höchst KG
ACHEMA PERSPECTIVES 2012

>> ABOUT US:
WHO WE ARE AND WHAT WE DO.

INFRASERV GMBH & CO. HÖCHST KG

>> WE OPERATE SITES FOR THE CHEMICAL AND PHARMACEUTICAL INDUSTRY.



SITE MANAGEMENT.

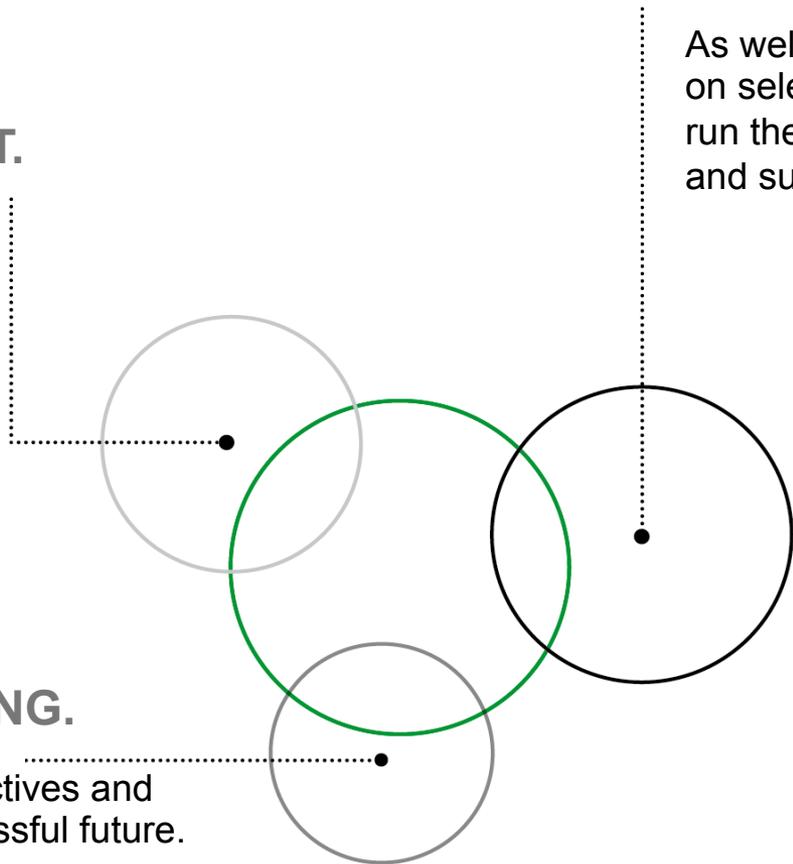
We take on the responsibility for the development of your site – and thus increase your company's competitiveness.

SITE OPERATION.

As well as entire sites, we take on selected processes and run them safely, efficiently and sustainably.

SITE CONSULTING.

We create clarity, develop perspectives and realise opportunities – for a successful future.



>> OUR LARGEST REFERENCE: THE INDUSTRIAL PARK FRANKFURT-HÖCHST.



>> OUR LIFE SCIENCES CLIENTS

>> OUR CHEMICAL INDUSTRY CLIENTS

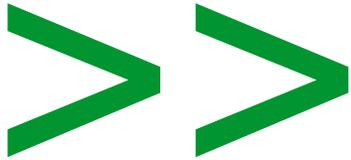


>> WE DELIVER
SITE EXCELLENCE.



SITE OPERATION. SITE SERVICES. UTILITIES. WASTE MANAGEMENT. LOGISTICS.

>> HOW WE WORK: **SAFE. EFFICIENT. SUSTAINABLE.**



safe

We combine know-how and many years of expertise as a leading site operator for the chemical, pharmaceutical and related process industries.

efficient

We activate performance reserves, use potentials and deliver consistent, measurable results as part of intelligently integrated end-to-end solution.

sustainable

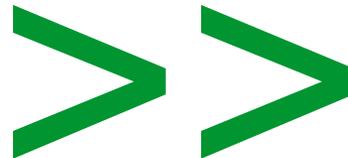
We follow an integrated, long-term approach based on partnership that benefits the client, the employees, the environment and the society.



>> A SITE MANAGERS PERSPECTIVE ON CURRENT AND FUTURE REALITIES.

AN ESSAY

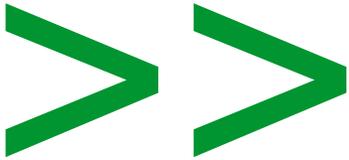
>> 1% OF THE GERMAN POWER DEMAND RELEVANCE OF THE TOPIC FOR INFRASERV



- 1.800 GWh/a power
- 600 Tm³/a drinking water
- 2.850 GWh/a heat (steam)

- 400.000 households of power use
- 4.000 households of water demand
- 140.000 one family homes of heat need

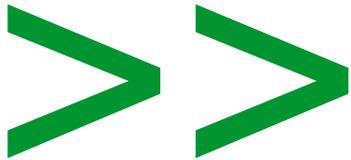
>> ENERGY SHIFT ACCELERATES STRUCTURAL CHANGES IN MARKETS AND TECHNOLOGIES



- Accelerated exit from nuclear power
- Realisation of a sustainable energy supply
- Necessity of new power plant capacities on the basis of renewable energies and natural gas
- Trend towards decentralised energy production
- Adaptation of grids to the future structure of energy production
- Changing economic frameworks in energy production and distribution



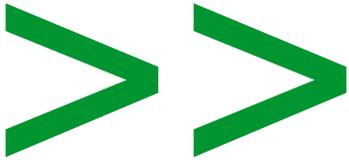
>> CUSTOMERS DEMAND FUTURE-PROOF ENERGY SUPPLY



- **COST EFFECTIVENESS**
Supply of an internationally competitive energy mix
- **AVAILABILITY**
Ensuring redundant supply for critical facilities / customers
- **SUSTAINABILITY**
Careful use of resources for energy production
- **NETWORK SYNERGIES**
Further development of production structure towards customer requirements and use of industrial networks in the region



>> FLEXIBLE ENERGY USAGE IS KEY – THREE LEVERS IN MANAGING THE ENERGY SHIFT



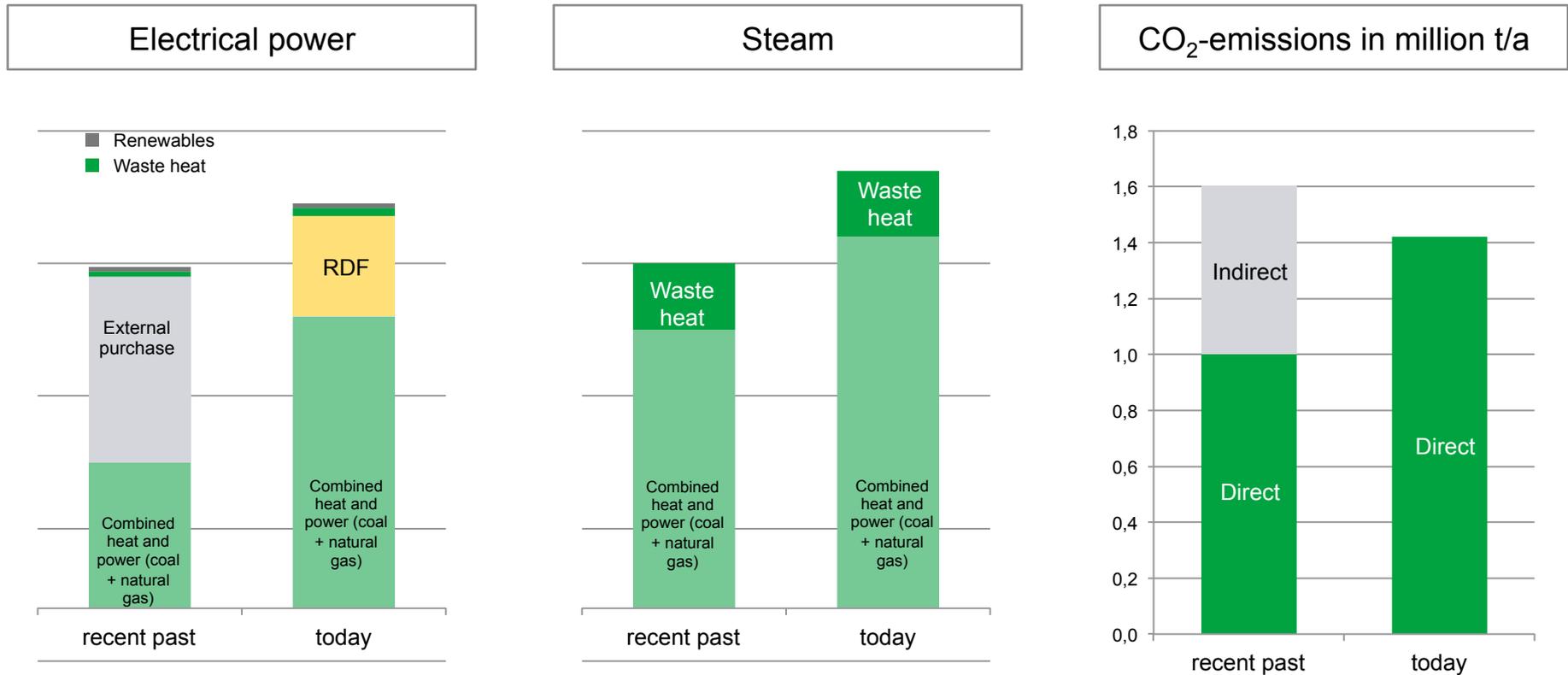
- **SWITCH TO RENEWABLE ENERGIES**
Biogas plant, biogas treatment, waste-to-energy concepts etc.
- **AVOID USING ENERGY**
Assess energy savings potential jointly with customers
Use Six Sigma projects to lower energy use on the site
- **INCREASE ENERGY EFFICIENCY**
Energy production in CHP: Efficiency >90%
Use of residual heat

**THE PATH TO INDEPENDENT ENERGY SUPPLY AND PROACTIVE USE OF
CHANGING PARAMETERS BRINGS MANY BUSINESS OPPORTUNITIES.**

>> SIGNIFICANT REDUCTION OF CO2 EMISSIONS ATTAINED VIA INVESTMENTS IN NEW FACILITIES



Total emissions were lowered by 160,000 tons per year even though an increase in energy demand has been observed.



>> FUTURE INDUSTRY NEEDS CALL FOR SUSTAINABLE ENERGY USE AND GENERATION – TODAY.

ACTIONS *today*

- Emissions monitoring
- Reduce carbon footprint
- Self-reliant energy production: Decoupling from volatile markets
- Explore and test new technologies
- Strengthen energy networks
- Reuse of material
- Integrated energy and disposal system: Waste-to-energy
- Help customers: consulting services
- Invest in efficiency: low energy buildings



NEEDS *in 2020*

ENVIRONMENT

- Higher efficiency
- Increased share of renewables

SOCIETY

- Less emissions and waste
- New technologies

EMPLOYEES

- Attractive sector to work in

ECONOMY

- Stable and secure prices
- New business opportunities



>> MEGATREND SUSTAINABILITY: FROM SHAREHOLDER VALUE TO SHARED VALUE?

The Big Idea

Capitalism is under siege....Diminished trust in business is causing political leaders to set policies that sap economic growth.. **Business is caught in a vicious circle....** The purpose of the corporation must be redefined around

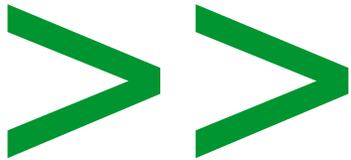
CREATING SHARED VALUE

How to reinvent capitalism—and unleash a wave of innovation and growth *by Michael E. Porter and Mark R. Kramer*



BUSINESSES MUST DEAL WITH POLICY CHANGES AND SOCIETIES HIGHER SENSITIVITY FOR SUSTAINABILITY IN ORDER TO BE SUCCESSFUL.

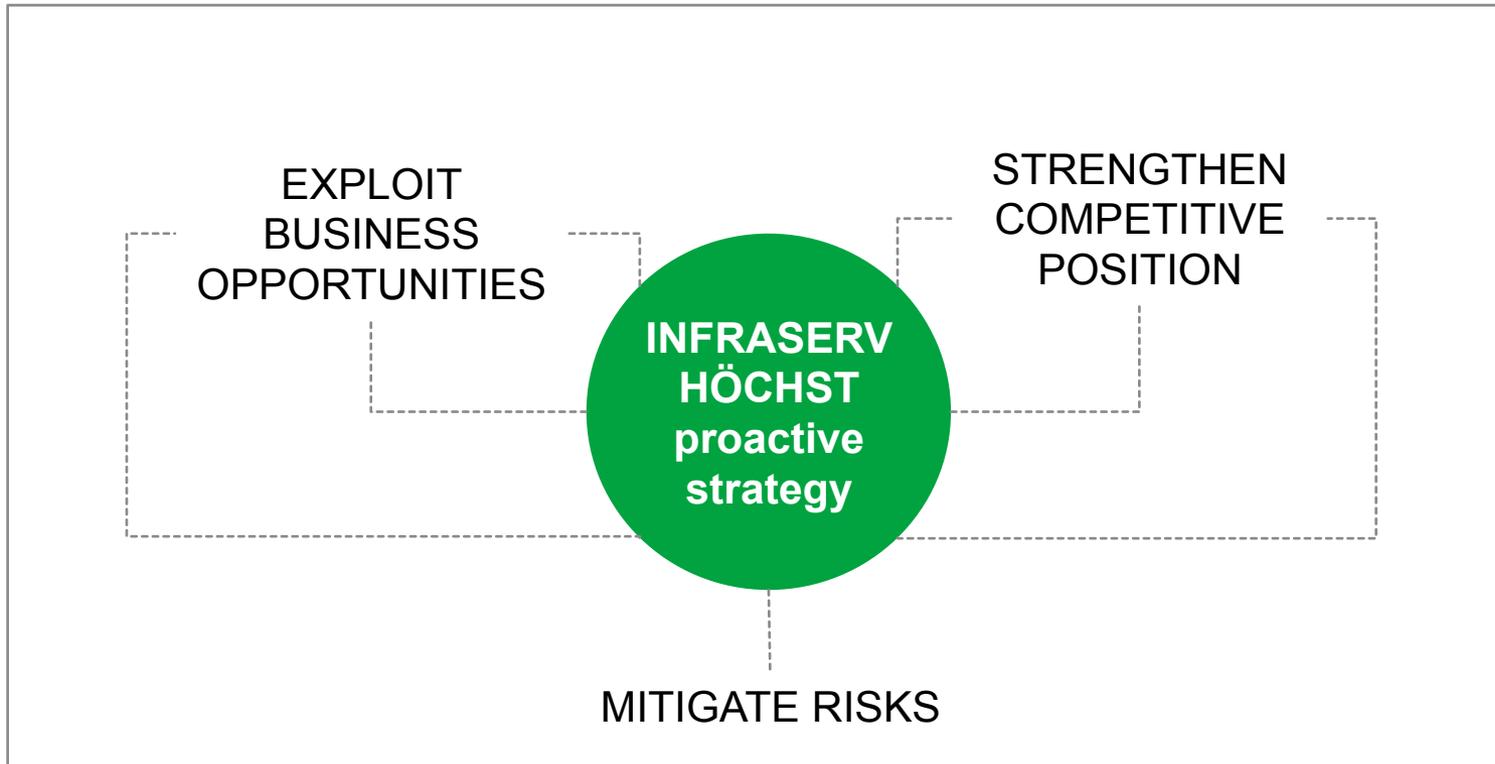
>> GOOD IDEA! FIVE ENTREPRENEURIAL REASONS FOR SUSTAINABLE DEVELOPMENT



- 1. LICENSE TO OPERATE**
Compliance with regulatory frameworks and thresholds
- 2. GOOD REPUTATION**
Sustainability as a mean to improve the company image
- 3. ETHICAL COMMITMENT**
Achieving entrepreneurial targets without jeopardizing ethical values and respect for humanity and the environment
- 4. „ENLIGHTENED SELF-INTEREST“**
Joint consideration of economic, environmental and societal needs
- 5. ECONOMIC SUCCESS**

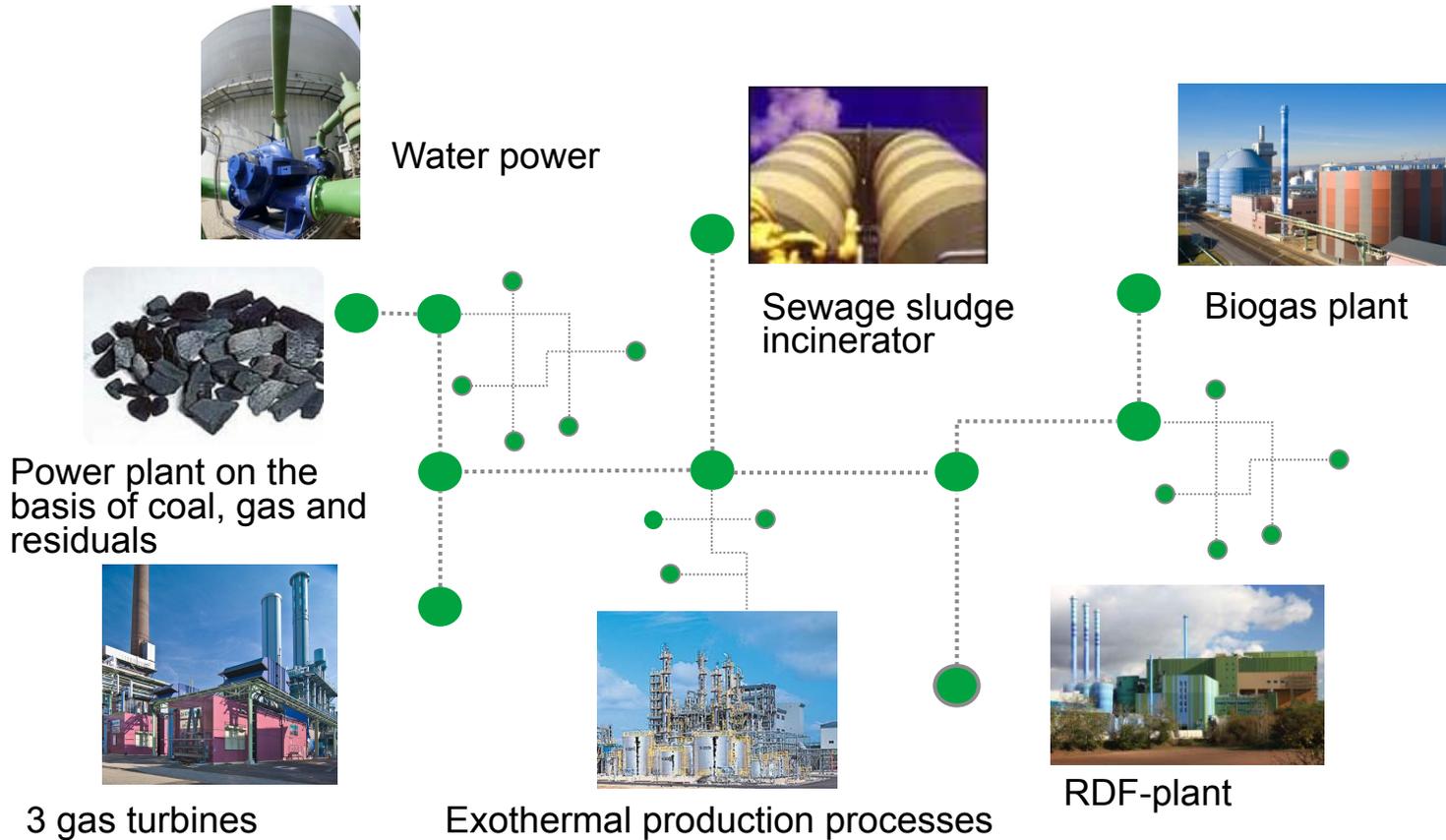


>> STRATEGIC DIMENSIONS OF SUSTAINABILITY OFFER OPPORTUNITIES AND THREATS ALIKE



OUR GOAL IS TO **INCREASE REVENUE AND PROFIT** THROUGH A **STRONGER COMPETITIVE POSITION.**

>> ECONOMIES OF SCOPE: EFFICIENCY-DRIVEN INFRASTRUCTURE DEVELOPMENT



ENERGY "VERBUND" AT FRANKFURT-HÖCHST INDUSTRIAL PARK

>> FORMING THE FUTURE WITH REGIONAL INTEGRATION – SOME EXAMPLES.

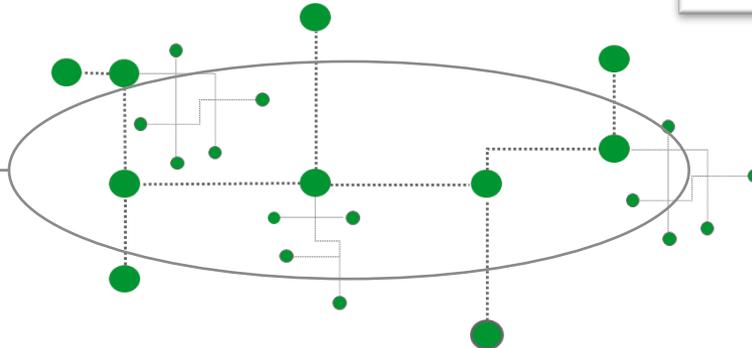
BIOGAS FOR LOCAL PUBLIC NETWORK



HYDROGEN FUEL STATION



Energy "Verbund"
Industrial Park
Frankfurt-Höchst



PLANNED: COUPLING OF HEATING AND COOLING NETWORKS



TREATMENT OF MUNICIPAL SEWAGE SLUDGE

>> A SITE MANAGERS PERSPECTIVE ON SUSTAINABLE DEVELOPMENT: VALUE FOR CLIENTS AND SOCIETY

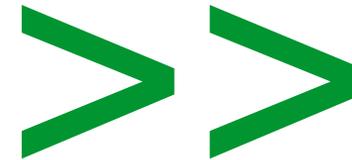
TODAY

2020

by 2030

SUCCESS MODELL INDUSTRIAL PARK FRANKFURT-HÖCHST

- High quality and cost efficient services
- Reputation for our customers
- High acceptance in society
- Attraction towards talents
- Stable environment
- Smart grids
- No nuclear power in Germany
- Energy storage systems
- Power to gas
- ...



„MANY
UNCERTAINTIES, BUT
WE ARE PREPARED“

MANAGING SUSTAINABLE DEVELOPMENT IS KEY TO LONG TERM COMPETITIVENESS IN GERMANY. THE CHAMPIONS OF TOMORROW SET A SUSTAINABLE COURSE TODAY!



>> THANK YOU
FOR YOUR ATTENTION.



DR. ROLAND MOHR, COO INFRASERV HÖCHST

