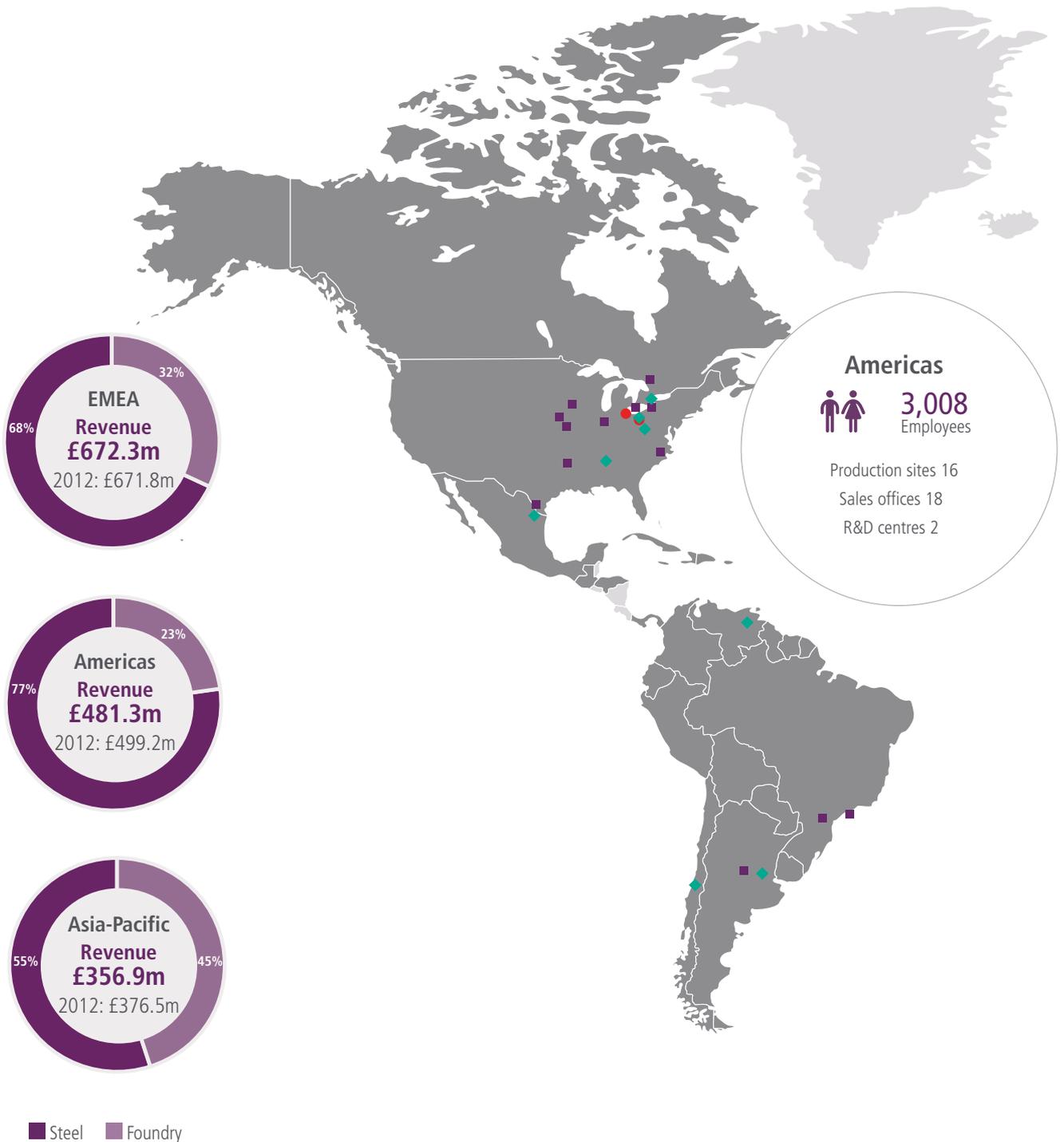
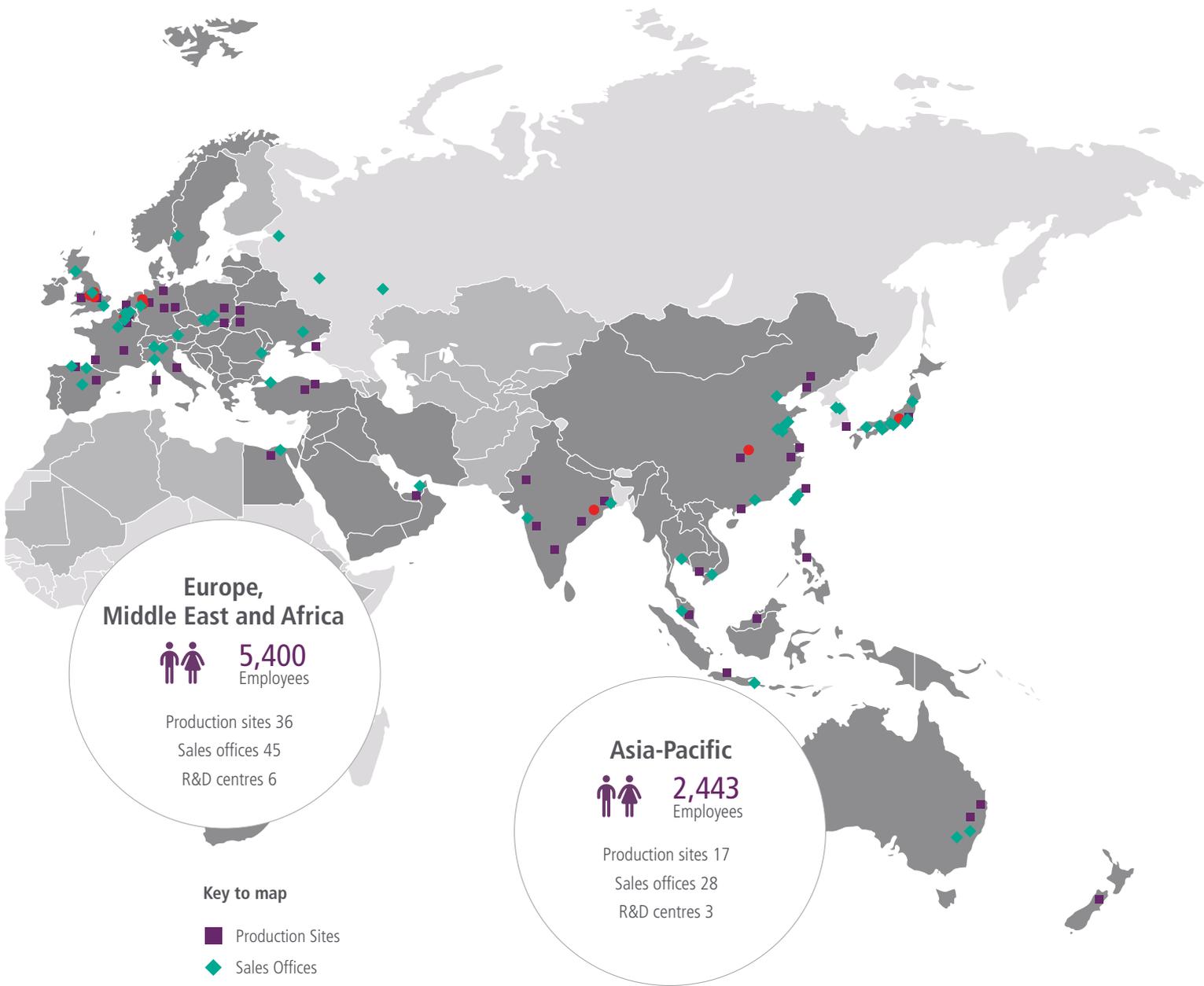


Group at a Glance

We are a truly global Group, with a business model based upon production at close proximity to our customers





1. Employee numbers as at 31 December 2013, excluding JVs



Steel division

The continuous casting of steel is a highly demanding process that is critically dependent upon consistent product quality and optimised production. Vesuvius provides systems, products and services that allow steel mills to control the flow of molten metal in the continuous and ingot casting processes. Our products protect the steel from oxidation and chemical contamination, increasing efficiency and productivity, enhancing quality, reducing environmental footprint and improving the safety of the casting process.

Steel Flow Control supplies products used to channel and control the flow of molten steel from ladle to tundish and from tundish to mould; slide-gate refractories for furnace, ladle and tundish; slide gate systems; temperature measurement and slag level detection; tundish and mould fluxes; and control devices to monitor and regulate steel flow into the mould.

These products have been designed to resist extreme thermomechanical stress and corrosive environments. The majority of these products are consumed during the process of making steel and, consequently, demand is primarily linked to steel production volumes.

Products of the **Advanced Refractories** product line include specialist refractory materials for lining steelmaking vessels such as blast furnaces, ladles and tundishes. These are in the form of powder mixes, which are spray-applied onto the vessel to be lined ("monolithics") and, to a lesser extent, refractory shapes (e.g. bricks, pads and dams). Vesuvius is one of the world's largest manufacturers of monolithic refractory linings for vessels subject to extreme temperatures, corrosion and abrasion. Key success factors in the Advanced Refractories product line are installation technologies, products adapted to fit customers' processes and effective and efficient logistics services. These factors are successfully combined by Vesuvius' R&D centres, its knowledge of customers' processes and its project management capability to deliver market-leading solutions to our customers.



Foundry division

Vesuvius' Foundry division, trading as Foseco, is a world leader in the supply of consumable products and associated services for use in the foundry casting industry.

The foundry process is highly sequential and, similar to the continuous casting of steel, is critically dependent on consistency of quality and productivity optimisation. The Foundry division's solutions allow foundries to reduce defects (and hence reduce labour-intensive fettling and cleaning), minimise metal usage requirements (hence reducing cost, energy usage and mould size), influence the metal solidification process (increasing metal performance and reducing the weight of pieces) and automate the moulding and casting process for gains in productivity, ease of reproduction and overall yield.

The conditioning of molten metal, the nature of the mould used and, especially, the design of the way metal flows into the mould are key parameters in a foundry, determining both the quality of the finished castings and the labour, energy and metal usage efficiency of the foundry. Vesuvius provides consumable products and associated services to foundries that improve these parameters.