

Emilio R. Tenuta
Director of Sustainability & Branding



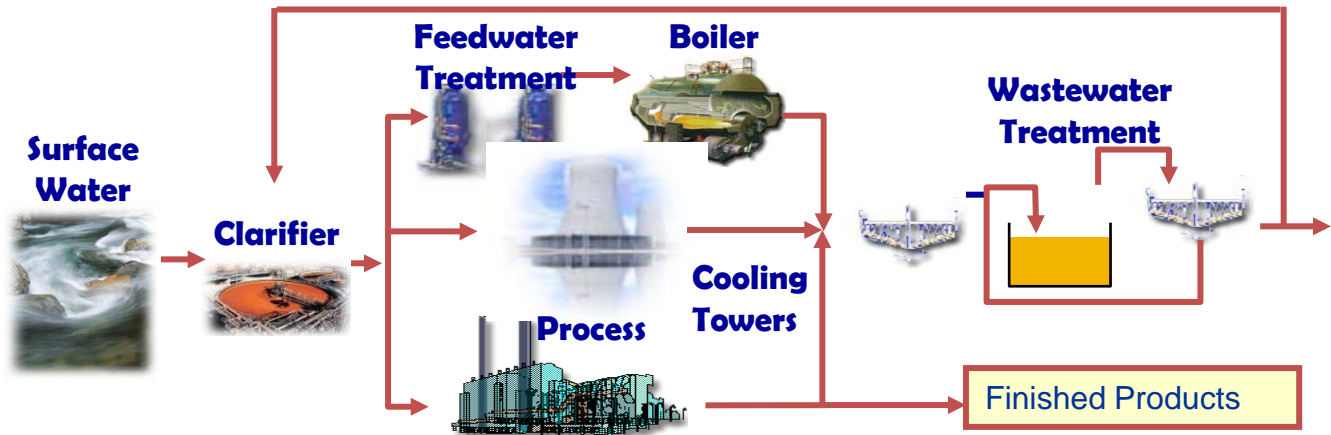
Essential Expertise for Water, Energy and AirSM



**Essential
to the
environment**

Nalco solves critical natural resource issues
(water, oil & gas, air, earth products)

Essential



**Essential to
customer
profitability**

Our programs keep operations running
and the lights on – sometimes literally

Expertise

Industry/Application Expertise

- 7,000+ sales engineers/service technicians
 - ✓ 50% or more of first year in training
 - ✓ Experienced teams -- U.S. average 9 years
 - ✓ District Managers average 15 years at Nalco
- Accelerated training & certification in high-growth markets
 - ✓ (Deepwater, Downstream, China Water, etc.)
- Global Expertise Centers share best practice knowledge
- Knowledge Management System connects >130 countries



R&D/Innovation Expertise

- \$1.1B in 2008 sales generated from products introduced in prior five years
 - ✓ 500 researchers, including >200 PhDs
 - ✓ 2000+ patents
 - ✓ \$74 million spend in 2008 (12% increase)
- Leading Water Treatment Technology Capability
- New state-of-the-art Ultra Deepwater lab
- 2009 opening for Air Pollution Control lab
- Portfolio now refocused on breakthrough developments



What Drives Our Outlook to the Future?

Key
Factors
Driving
Growth

	<u>Resource Issue</u>	<u>Opportunity for Nalco</u>
	<p>Quality</p> <p>Scarcity (recycling & reuse)</p> <p>Energy efficiency (heat transfer)</p> <p>Wastewater requirements and enforcement</p>	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>
	<p>Reservoir efficiency (EOR)</p> <p>Hard-to-reach oil (deep/ultra deep)</p> <p>Opportunity crudes</p> <p>Produced water purification</p> <p>New energy</p>	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>
	<p>Sulfur and nitrogen oxides, mercury, particulates</p> <p>Combustion efficiency</p> <p>Greenhouse gases</p> <p>Indoor Air Quality</p>	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>

Essential Expertise for Water, Energy and AirSM

Unmatched, Diverse Global Presence

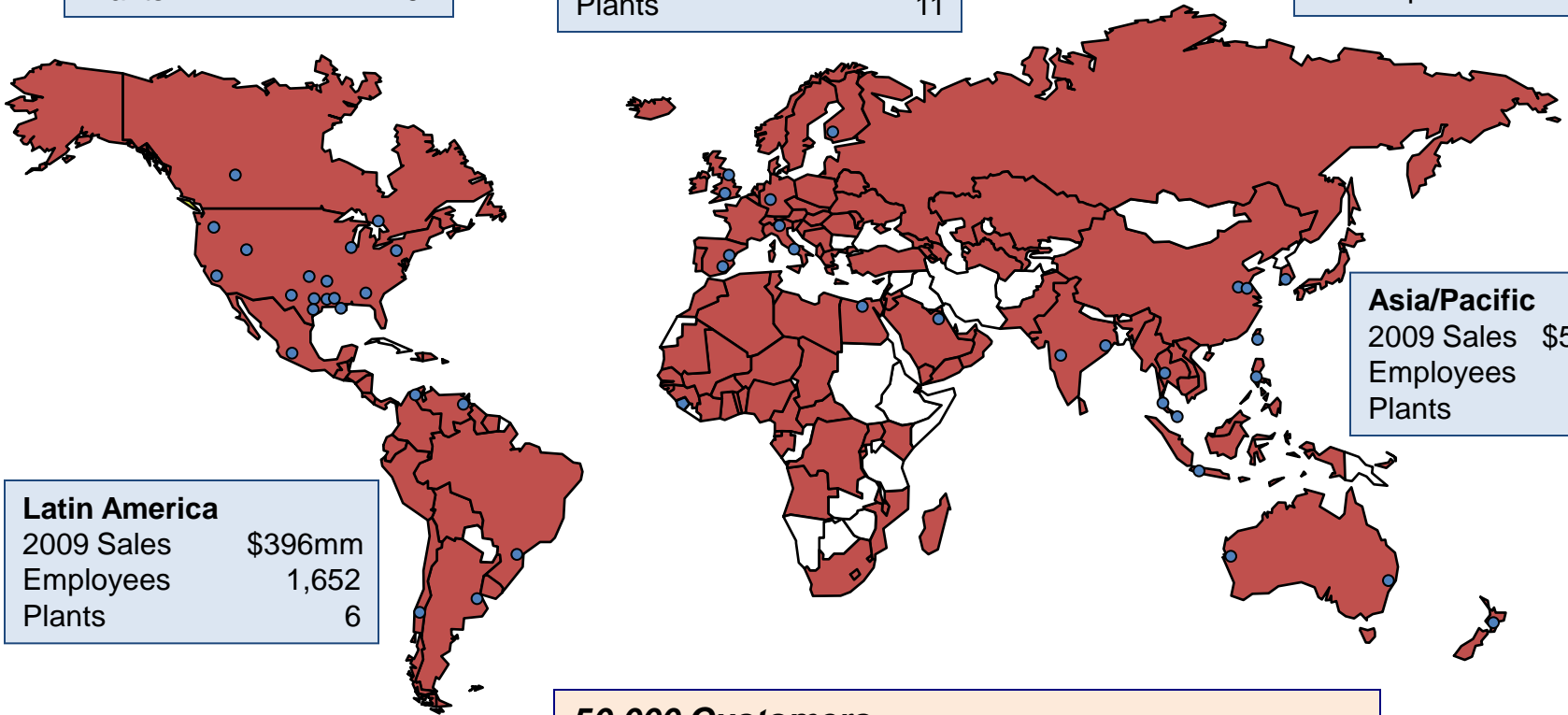
North America

2009 Sales \$1,800mm
Employees 4,653
Plants 16

Europe/Africa/Middle East

2009 Sales \$960mm
Employees 2,781
Plants 11

● Plant
■ Countries of Operation



Latin America

2009 Sales \$396mm
Employees 1,652
Plants 6

Asia/Pacific

2009 Sales \$591mm
Employees 2,504
Plants 14

50,000 Customers
7,000+ Sales and Service Professionals
Largest Customer = <4% of sales
Of Top 20 Customers, 19 with Nalco >10 years

Generating Measurable Results



Water and Maintenance Cost Savings

Plant: Dow Freeport
Region: North America

Situation:

- Water supply challenges
- Heat transfer inefficiency
- Unscheduled production outages



Application: 3D TRASAR® Cooling Water Technology

eROI Benefits:

- 1 billion gallons of water saved annually
- Improved system reliability
- Reduced maintenance
- Estimated \$4,000,000 in annual maintenance cost savings
- Substantial, but not quantified energy savings

One Billion Gallons.

Clean, available water is the most important resource for both human and economic development.

Working together, Nalco and Dow save one billion gallons of water a year at Dow's plant in Freeport, Texas.

That's enough water to sustain the population of Freeport for 3 years or for the daily use of more than 14.4 million people.*

NALCO

DOW

Dow's commitment to addressing the global water crisis includes game-changing technologies, partnerships in strategic regions, and collaboration with industry leaders like Nalco to reduce its environmental footprint.

www.nalco.com/3dtrasar
for more information.

*Based on average daily water use assuming 70 gallons per person per day.

U.S. edition of *Wall Street Journal*

Sustainability Branding Targeting Multiple Stakeholders

Nalco Operations & Employees

- Align corporate culture to “walk the sustainability talk” with internal environmental KPI’s & metrics (10% Energy KPI by 2012)
- Instill a sense of pride in what we do and the difference we as a company make in the world environmentally.

Customer

- Linking Nalco’s branding to our efforts in TCO and sustainable development.
- Communicate a clear **eROI** of Nalco solutions
- Launch co-branding efforts like the Dow ad

Communities & Investors – Partnerships

- Commitment to the UN Global Compact & CEO Water Mandate
- Collaboration with major Non Government Organizations such as World Wildlife Fund (WWF)
- Listed on the Dow Jones Sustainability Index (DJSI)
- Green Chemistry Award, ASM Innovation Award
- Volunteer opportunities with Water for People through the World Water Corps- Rob Henderson to Bolivia



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**Newsweek Top 100
Greenest Companies**

