



BURNERS

FLARES

THERMAL OXIDIZERS

VAPOR CONTROL

RENTALS

AFTERMARKET



ZEECO

2019 International Sales Meeting

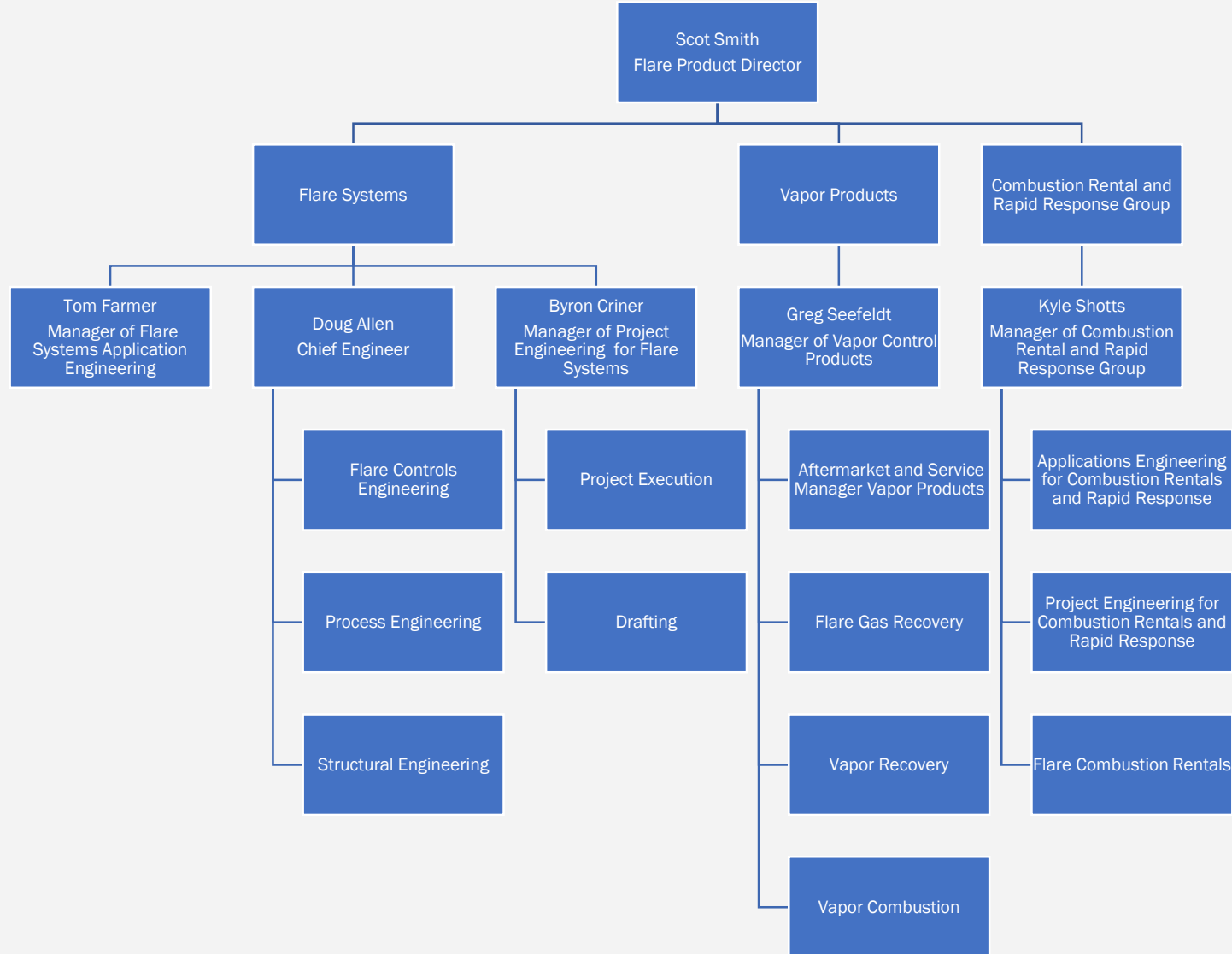
Flares

Agenda

- Department introduction
- New product/market development
- Competition analysis
- Zeeco's competitive advantage
- Real life applications and sales strategies
- What we need from our sales team/agents
- How we can support you



Flare Department Introduction



Flare Systems Group Introduction



The Lineup!



Scot Smith



Tom Farmer
Flare Systems
Applications
Engineering



Doug Allen
Chief Engineer



Byron Criner
Project Engineering

Flare Systems Group Introduction



What we do

- Burn Pits
 - ARAMCO
 - SASOL
 - MTBE



Flare Systems Group Introduction



What we do

➤ Multi Point Ground Flares

- Reduced Flame Visibility
- Suitable for Tight Plot Spaces
- Suitable for Flight Paths
- High Smokeless Capacity
- Customers & Applications
 - APLNG
 - FREEPORT LNG
 - SASOL
 - EXXONMOBIL



Flare Systems Group Introduction



What we do

➤ Enclosed Ground Flares

- Quite, Hidden Flame
- Can be staged to elevated flares
- Customers & Applications
 - PTTPE
 - UTE Khabarovsk
 - ADMA ADCO
 - Ineos Grangemouth



Flare Systems Group Introduction



What we do

- Elevated Flares
 - Self Supported



Flare Systems Group Introduction



What we do

➤ Elevated Flares

- Guy Wire Supported



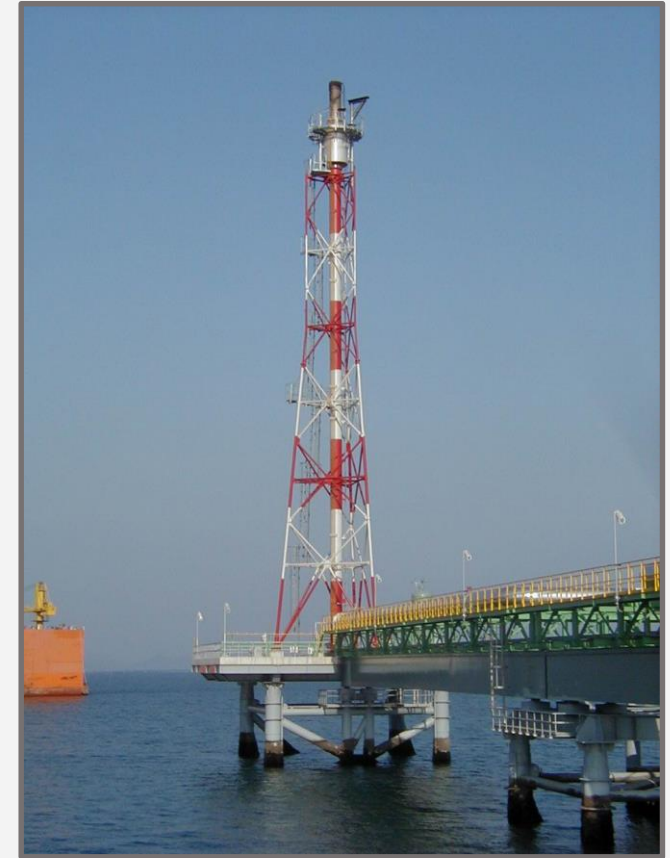
Flare Systems Group Introduction



What we do

➤ Elevated Flares

- Derrick Supported
 - Tall Flares (200m +)
 - Tight Plot Space
 - Multiple Risers



Flare Systems Group Introduction

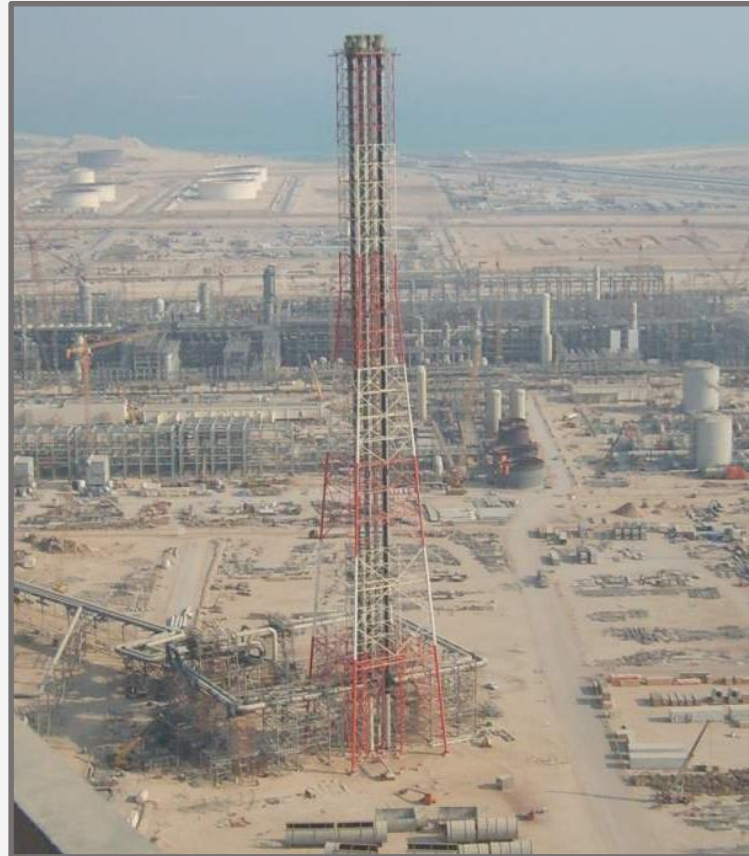


What we do

➤ Elevated Flares

■ Demountable Derrick

- Multiple Risers on a structure
- Tip maintenance without a crane
- Installed Spare so maintenance can be performed without shutdown



Flare Systems Group Introduction



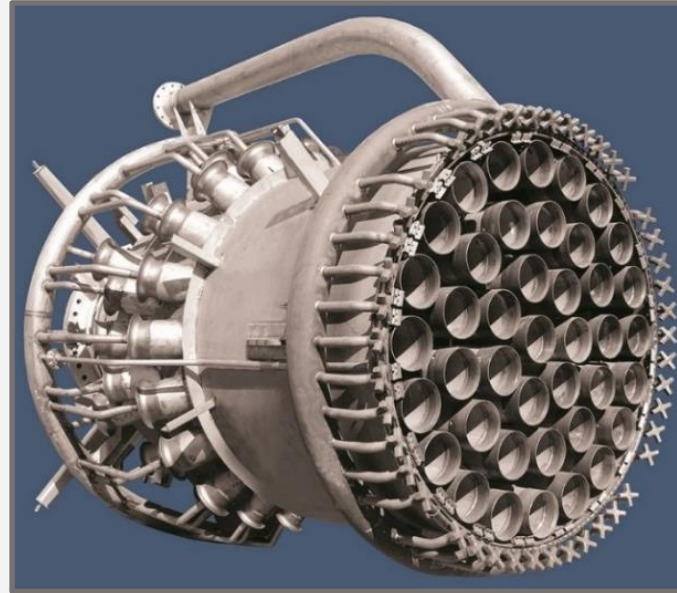
What we do

➤ Steam Assisted Tips

- QFS
- HCL
- MJS



QFS



HCLSC



MJS

Flare Systems Group Introduction



What we do

➤ Air Assisted Tips

- AFDS
- AFTA
- UFAA
- HPASS



AFTA



UFAA



AFDS



HPASS

Flare Systems Group Introduction



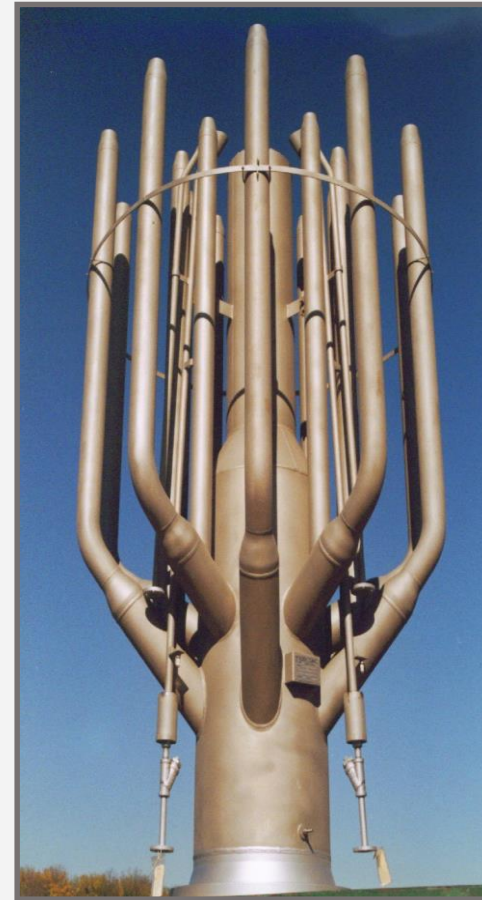
What we do

➤ Pressure Assisted Tips

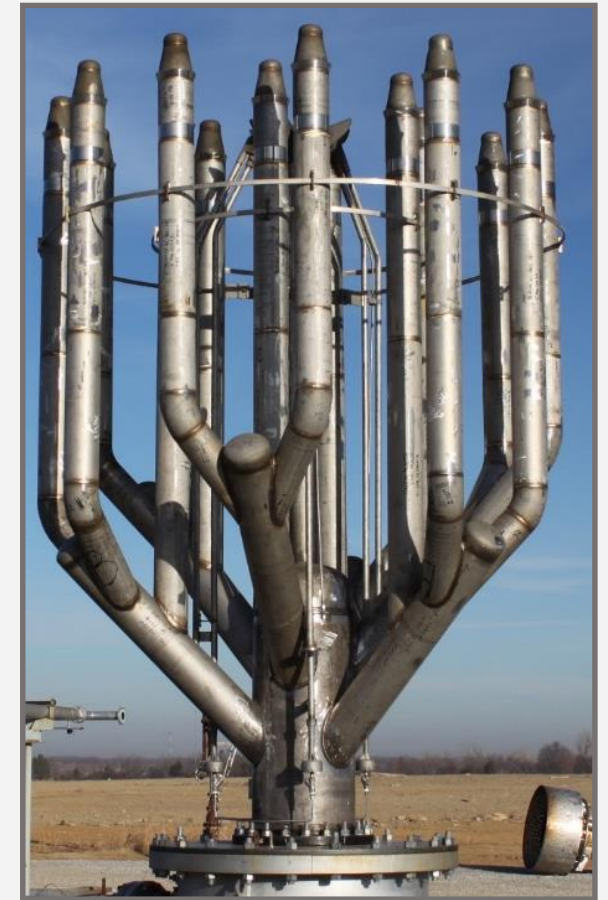
- UFX
- Multi Jet
- VariJet



UFX



MJ



VJ

Flare Systems Group Introduction



What we do

➤ Non-Assisted Tips

- Utility
- Low BTU



UFW



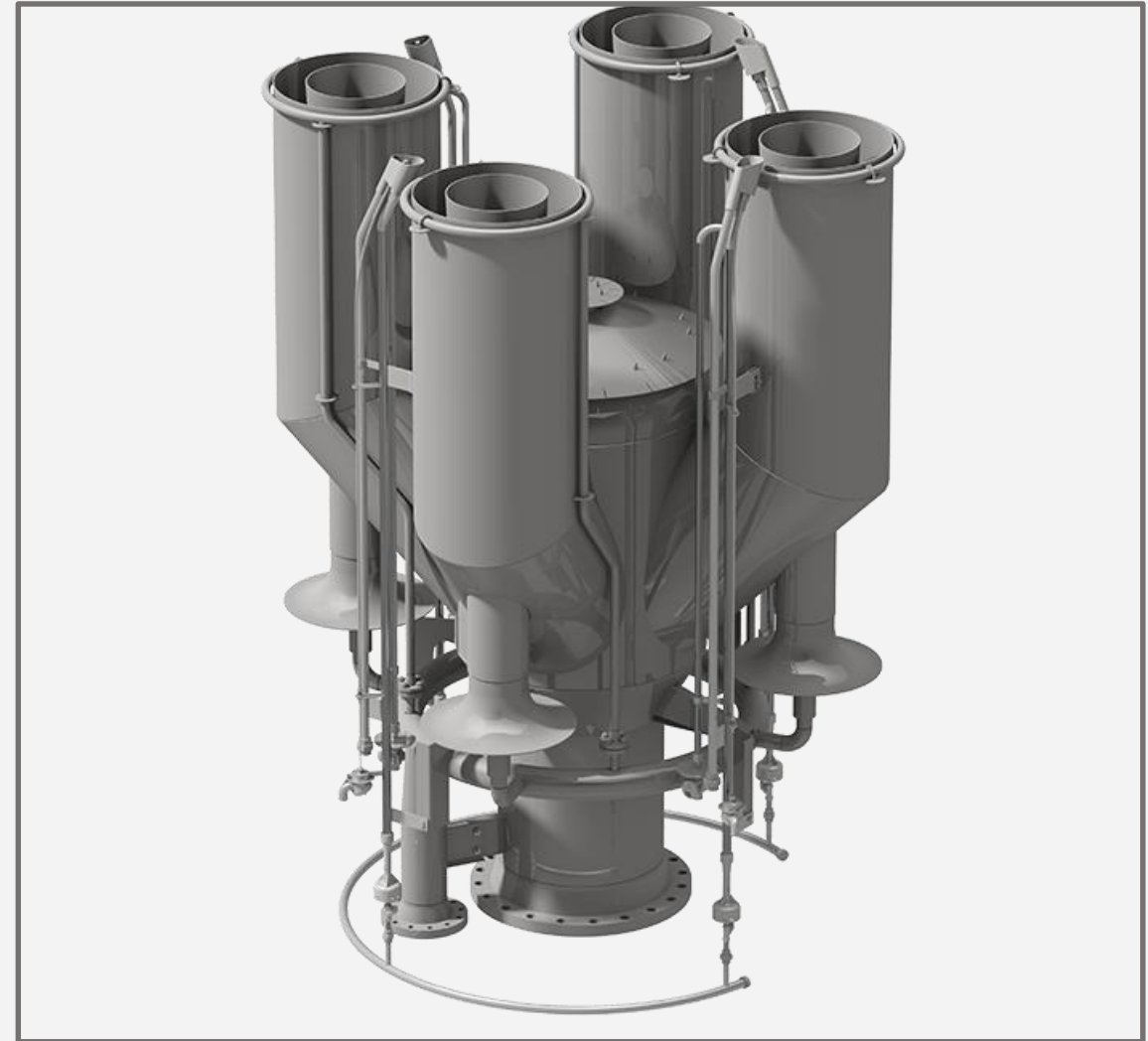
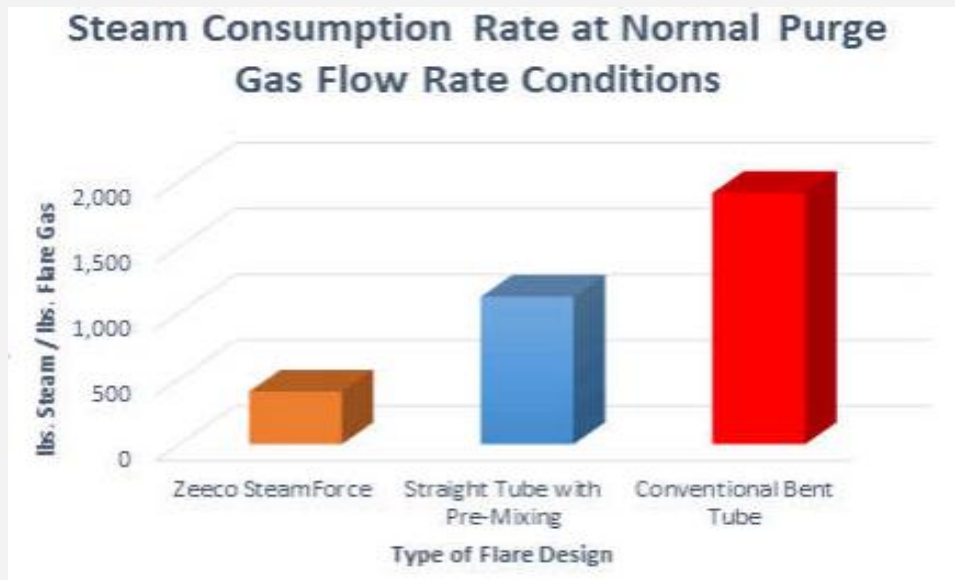
UFW – Low BTU

New Product/Market Developments



SteamForce HC™

- Highest Efficiency Steam Assisted Flare Tip
- No Pre-Mixing of Fuel, Air & Steam before existing Tip
- Supersonic Steam Injection
- True Venturi Design
- Single Steam Line for Fewer Steam Controls



New Product/Market Developments



FlareGuardian™ - Monitoring Flare Performance with
Video Imaging Spectro-Radiometer (VISR)

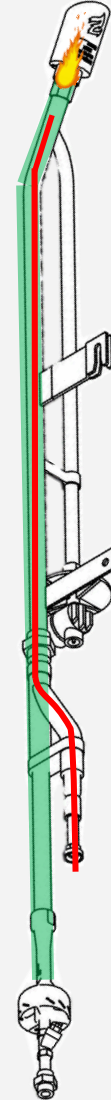


New Product/Market Developments



VERIFEYE™

- Fiber Optic relays IR signal to grade instantaneously
- Differentiates between pilots, flare flame
- Robust construction with exclusive use of high temperature materials
- Located in air/gas line so continuously cooled
- Mechanical packaging for modular installation
- Maintains full stability
- Patented Design



New Product/Market Developments



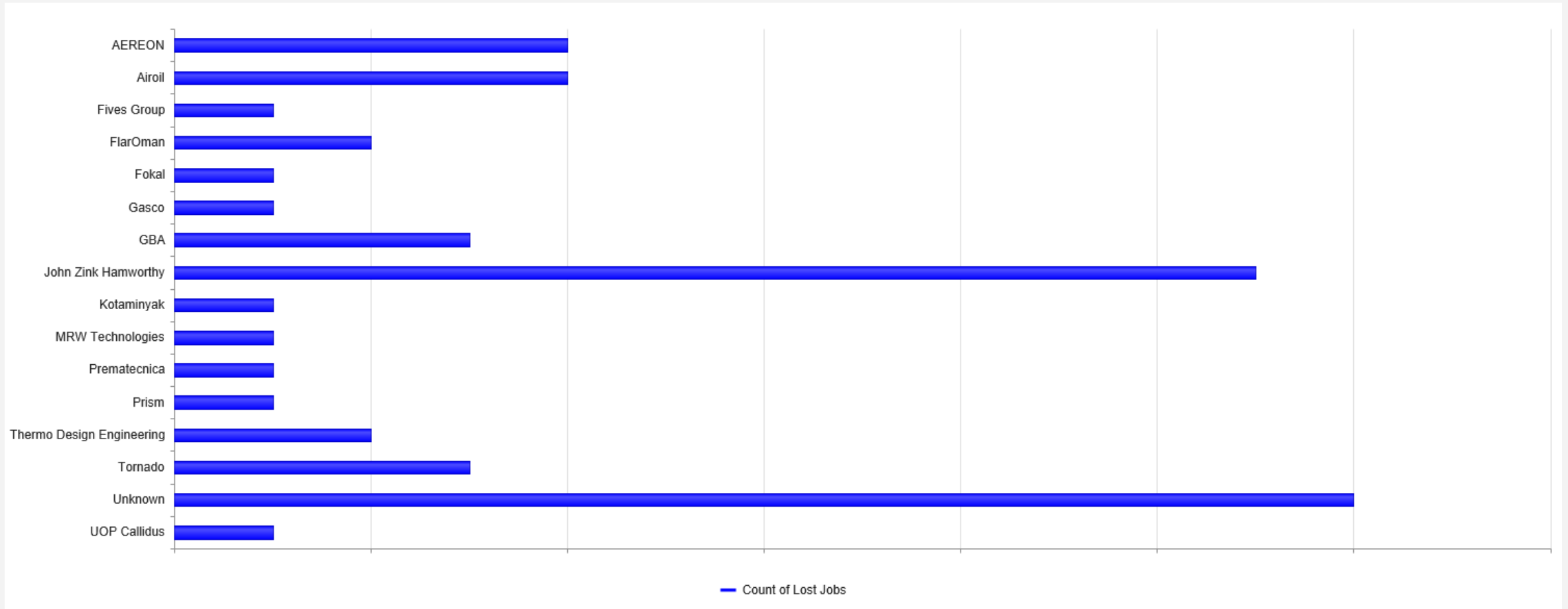
Contour™

- Automated smokeless flare control
 - Direct, real-time assessment of the combustion zone and automatic smokeless injection medium
- IR Technology with specific spectrum to flare monitoring
- Grade mounted for easy maintenance

Competition Analysis



Zeeco's competition comes in many forms



Competition Analysis



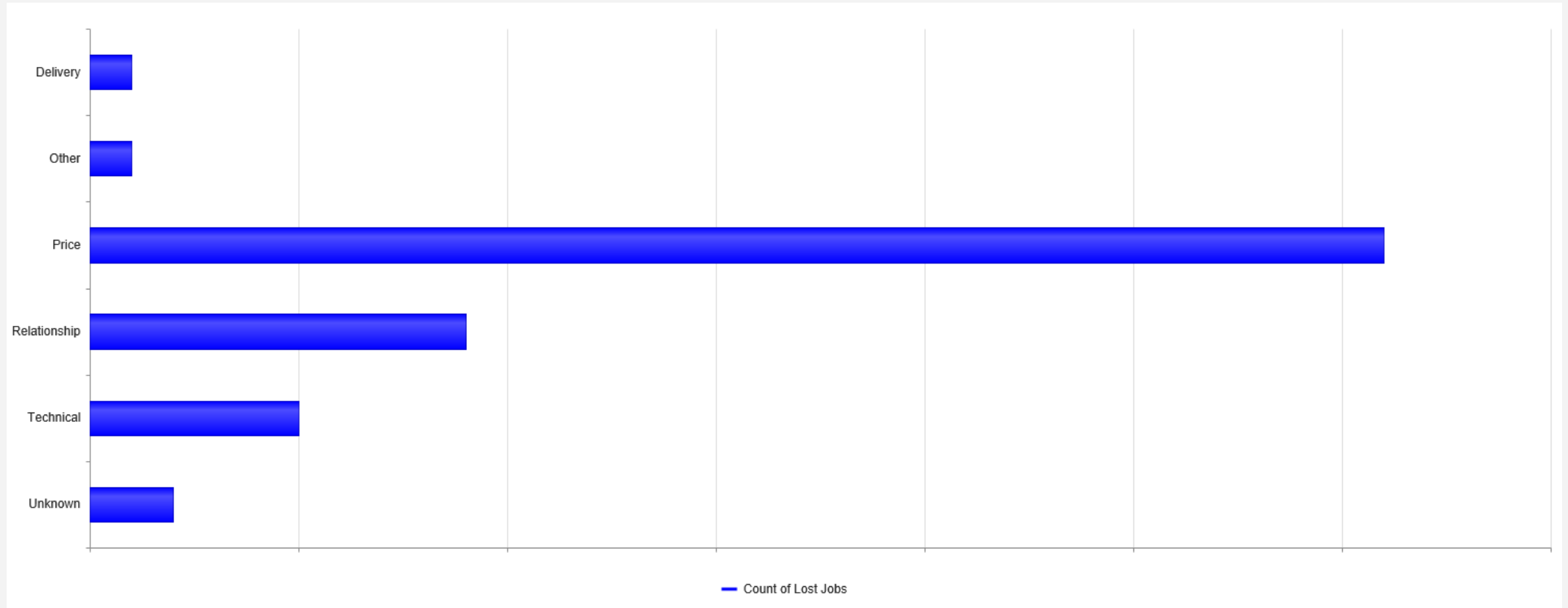
Zeeco's competition comes in many forms

- We compete against a very large number of competitors
 - This presents many challenges, but it also presents many opportunities
 - The wide range of competition means we have to adapt our bidding style for each region or bid:
 - Some are high technology
 - Some are price driven
 - Some are relationship

Competition Analysis



Lost projects come in many forms



Competition Analysis



➤ Delivery

- In Flare Systems, delivery is rarely a cause for loss. This is in large part due to feedback because we don't want to let delivery exclude Zeeco from an order

➤ Other

- Can be a variety of reasons but should rarely be selected as reason for loss

➤ Price

- Number one reason for loss. This is largely do to our variety in the market and our willingness to bid against a broad competition base, but can also provide for feedback to make us more competitive in the future
 - When we loose by price, we want more information:
 - Did we have pricing feedback?
 - Apples to Apples Supply?
 - Was our stack taller, or larger diameter or some other design difference?
 - Did we select a less competitive fabrication location?
 - Did our competitor take exceptions that we didn't?

Competition Analysis



➤ Technical

- Loss due to competitors technical ability
- Loss due to specification compliance issues
- Loss due to other technical preference

➤ Unknown

- We need to eliminate the unknowns in the form of who we lost too, and also why we lost

Competition Analysis



➤ Relationship

- Loss due to relationship comes in three forms
 - Competition had a better relationship with key purchasing personnel
 - Received better feedback or general preference
 - Customer is un-happy with Zeeco for previous performance
 - Customer is just comfortable with their normal supplier
 - This is a customer that we want!
- Many of the reasons for loss can be tied back to relationship
 - Did we know we were high on price?
 - Did we know we were not meeting a specification requirement?
 - If we don't know why we lost after probing, then we need to continue to build our relationship. Not just that we lost on price, but by how much

Zeeco's Competitive Advantage



➤ Our People and ownership

- We have the best combustion experts in the industry
- We have dedicated and aggressive ownership

➤ Technology

- We can excel against any one in the world with our technology and can offer it at a very competitive price

Zeeco's Competitive Advantage



Technology

- We can excel against any one in the world with our technology and can offer it at a very competitive price
 - Pilot reliability and durability
 - High stability – hurricane tested!
 - Cast components for long durability
 - Completely protected thermocouple
 - Retractable thermocouple options



Zeeco's Competitive Advantage



Technology

- Multi-Point Ground Flare Experience
 - 100% Xylene Flaring, LNG Experience, Petrochemical
- Enclosed Ground Flare
 - 100% Smokeless design without the need of additional assist at low operating pressures



Zeeco's Competitive Advantage



Technology

➤ STEAMFORCE

- Lowest Steam Consumption and Operating Cost

➤ VariJet

- Completely sealed nozzles for
 - Lower purge rates
 - No smoking during low flow of heavy gases
 - Longer Life



Zeeco's Competitive Advantage



Our Test Facility

- Two 30,000 Gallon Mix Tanks for Large Capacity Testing
- Testing of 100% Xylene, Propylene, Natural Gas and more



Xylene

Zeeco's Competitive Advantage



Our Test Facility

- Staged Multi Point Ground Flare Tips
- Enclosed Ground Flare Chamber
- Elevated Flare Tip Options
 - Steam Assist
 - Air Assist
 - Gas Assist



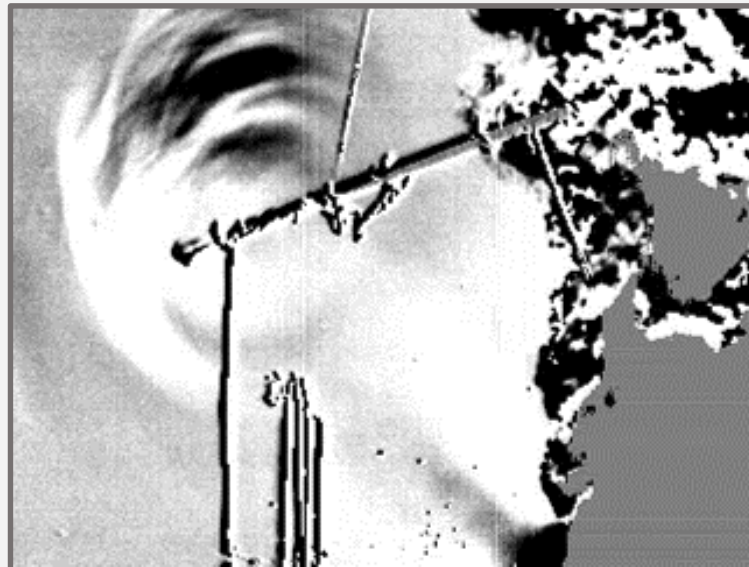
VariJet

Zeeco's Competitive Advantage



Our Test Facility

➤ Emissions Testing

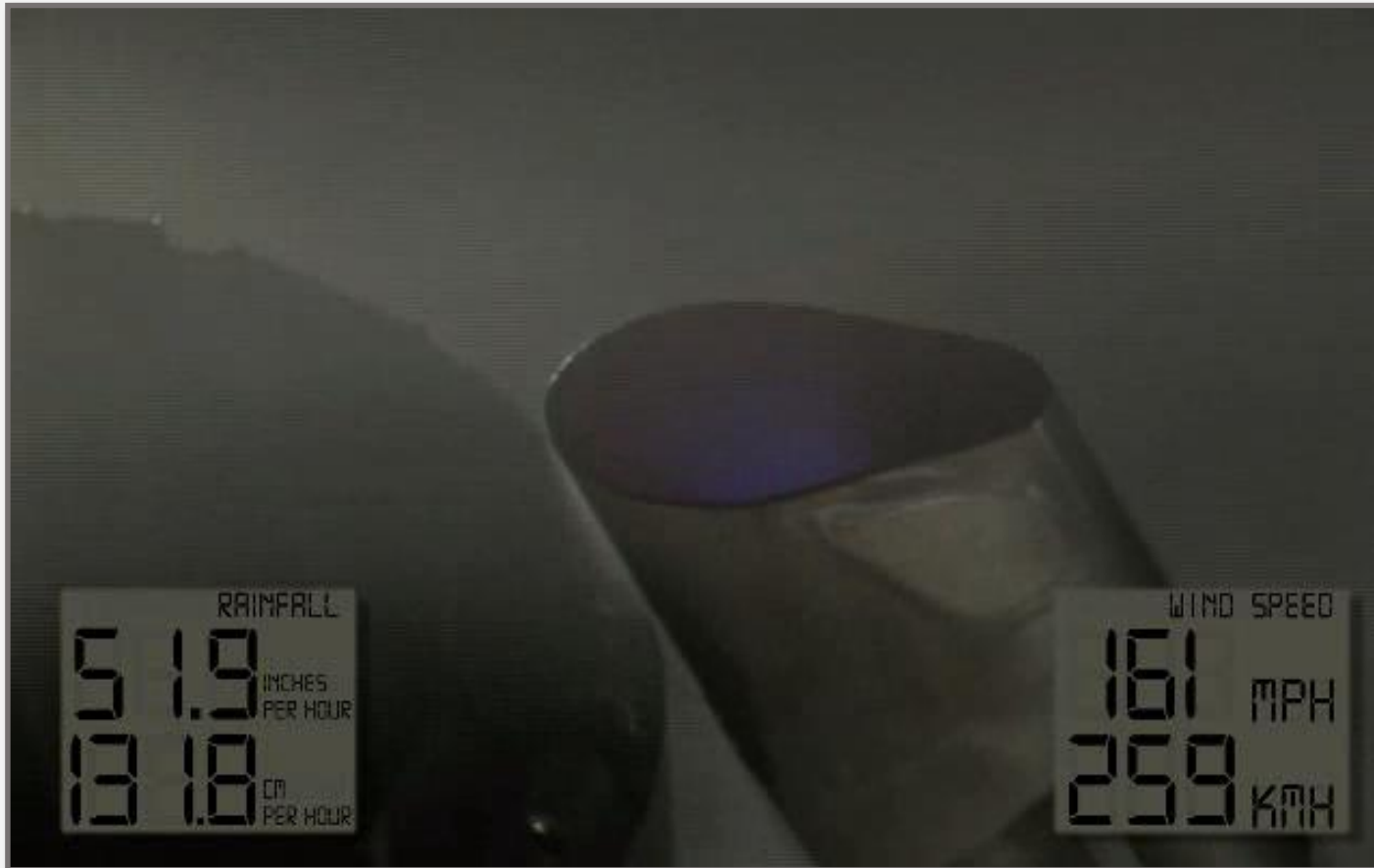


Zeeco's Competitive Advantage



Our Test Facility

➤ Pilot Hurricane Test Pad



Zeeco's Competitive Advantage



- Zeeco's size and flexibility
 - We are large enough to quote and execute a high volume of orders
 - We are flexible enough to execute all ranges of products, from upstream to refinery
- We have a very low warranty claim with few field issues
 - When we do have field issues we provide excellent support to help solve the problem.
 - We have customers that come back to us because they were appreciative in our follow up support

Zeeco's Competitive Advantage



➤ Regional manufacturing options

- Zeeco HQ / Zeeco Middle East / Zeeco UK / Zeeco India / Zeeco China / Zeeco Korea
- Helps ensure we are price competitive
- Helps ensure we have a logistic advantage

➤ Regional Support offices

- Sales, aftermarket and site service support from locations all over the world

Zeeco's Competitive Advantage



Technical experience and long users list with reputable companies such as

- Saudi Aramco
- ExxonMobil
- Dow
- SHELL
 - SHELL EFA in Place
- Pertamina
- Petrobras
- Total
- BP
- KOC
- ConocoPhillips
- PetroChina
- Sonatrach
- SABIC
- Reliance
- EIL
- Chevron
- Petronas
- ADCO

Real Life Applications and Sales Strategies



- Package Deals (Flares, Vapor, Thermal Oxidizer etc.)
 - Many Midstream package opportunities
 - Midstream Gas Plants
 - Audubon for XTO
 - BP Tangguh
 - LNG Applications
 - All LNG Facilities will have a Flare and Thermal Oxidizer
 - Even IF the deal isn't packaged, we are able to obtain many orders because it is easier to work with one company than with multiple companies

Real Life Applications and Sales Strategies



➤ Get the 1st one!

- When we know there are expansions or multiple phases we want to be very active in getting the first flare
 - Midstream USA (Targa / Saulsbury)
 - QGC in Australia
 - 3 Initial Flares turned into 24 Permanent Flares and 25 Mobil flares
 - ARAMCO Burn Pits
 - Originally sold a few Liquid Burn Pits to ARAMCO for Plant Applications
 - Next sold 23 gas blowdown burn pits for Aramco
 - Now over 120 Burn Pit Applications
 - DEWA Enclosed Flares
 - 6 Enclosed Flares
 - MTBE
 - 2 Air Assisted Liquid Burners, now 12 more

Real Life Applications and Sales Strategies



- Follow through with EPC AND End User contacts
 - In many applications we can find out we are in a good position from the End User which helps strengthen our position
 - We can work with the End User to help clarify ongoing issues
 - ExxonMobil
 - We can work with the end user to put pressure on the EPC to use Zeeco
- Up Front Support
 - Zeeco supports many customers during FEED and Bid for Bid process, helping them secure a project. Remind them of this!

Real Life Applications and Sales Strategies



LNG Canada

➤ Upfront Support

- Zeeco has been working with SHELL and EPC's since 2015

➤ Experience List

- Zeeco has excelled in LNG Applications, with more installations than anyone in the world

➤ Follow through with EPC AND End User Contacts

- Utilized contacts within SHELL to help put pressure on EPC to follow through with Zeeco
- Utilized contacts within EPC JV side for support
- Utilized contacts within EPC that were not directly involved with the project for support

➤ NEVER GIVE UP!!!

What We Need From Our Sales Team/Agents



- Inquiries
- Form positive customer relationships
- Information
 - Who are we bidding against
 - What will it take to win the job and what are the key factors for the customer?
 - Price
 - Delivery
 - Relationship
 - Technology
- Help Zeeco “connect the dots”
 - Notify different groups if a customer has sent in an inquiry to Flares & TO's, as example
 - Maybe the TO / Flare group is in a good position for an order and we can increase the opportunities of the other group by packaging the equipment

What We Need From Our Sales Team/Agents



➤ Customer Feedback

- Are they happy / unhappy with Zeeco for any particular reason
- Would they like to see something different in our bid

➤ Specifics

- When we are down to final negotiations, what specifically will get us the project
 - In final negotiations what price is required to win the job?
 - Is our delivery okay?
 - If delivery is critical, can our shorter delivery earn us a premium?

How We Can Support You



- Support our customers during bid for bid and feed projects
- Use the home office
 - Courtesy visits to customers
 - Educational “Lunch and Learns”
 - Technology Visits
 - Bid clarification meetings
 - Opportunities for personnel from the head office to clarify the quote or application
 - For many major projects we may only get one chance to meet the customer, and it can be significant in increasing our opportunity for success
- Zeeco Combustion Academy and customer training



BURNERS

FLARES

THERMAL OXIDIZERS

VAPOR CONTROL

RENTALS

AFTERMARKET