

Capabilities

More than 75% of Murray & Roberts activity is directed into the construction economies of South and Southern Africa, Middle East, Southeast Asia and Australia. Industrial manufacturing represents less than 25% of activity, but forms an important anchor for the Group into the South African economy, leveraging domestic competitiveness into selected global markets.

CONSTRUCTION ECONOMY

The construction economy is a well defined element of every national economic framework and is identified as a component of gross fixed capital formation (GFCF) within gross domestic product (GDP).

An established benchmark for developing countries is that GFCF should average between 20% and 30% of GDP and that construction investment should represent between 20% and 30% of GFCF.

The construction economy is represented by all expenditure associated with fixed investment into physical infrastructure, production and commercial facilities and accommodation, as performed by general and specialist contractors, engineers, materials suppliers and service providers. It generally excludes generic machinery and equipment.

Market sectors

- Mining & industrial
- Building & infrastructure
- Energy, power & environmental

■ Construction & engineering

Murray & Roberts offers a unique combination of multiple disciplinary capabilities in design, engineering and various construction skills and has a proven track record in mega project implementation. The Group is positioned as a primary contractor in the delivery of mining and general infrastructure, commercial buildings and industrial facilities.

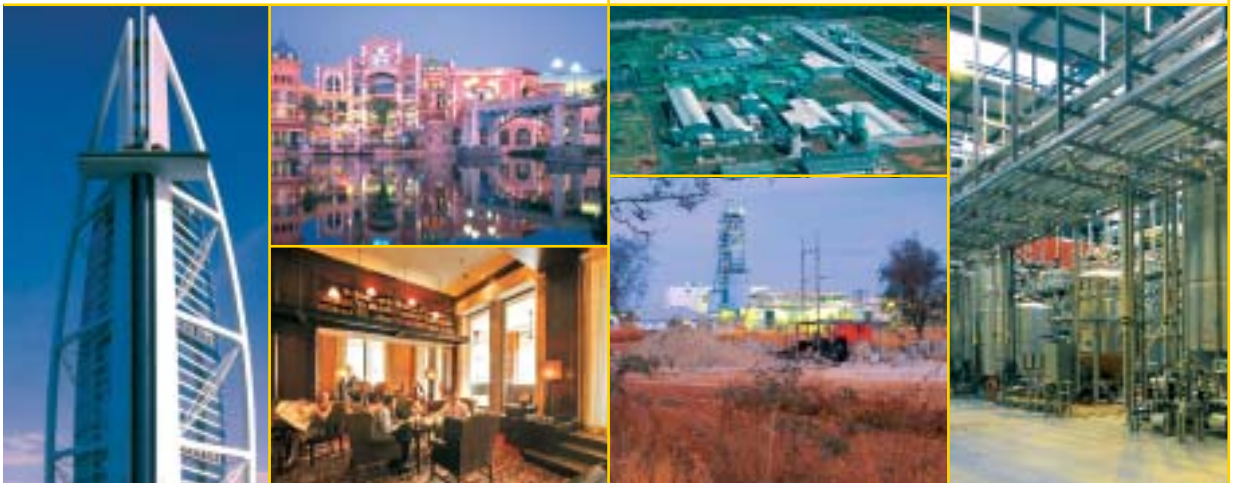
The Group's primary market focus is the extraction, beneficiation and industrialisation of natural resources.

The acquisition of Cementation in South Africa and Canada and a strategic shareholding in Clough based in Australia has extended this focus in the global marketplace.

Murray & Roberts values innovation and is able to adapt to complex environments which positions it as a leading contractor in the southern hemisphere and developing world.

Capabilities:

- Construction
- Mining
- Engineering



INDUSTRIAL MANUFACTURE

■ Construction materials & services

Murray & Roberts supplies the construction markets of Southern Africa with quality service, materials and products through its technical capabilities in concrete, asphalt and steel.

This is underpinned by operational presence throughout the SADC region, appropriate technology, uncompromising quality and service excellence.

Murray & Roberts converts about one million tons of primary steel, a quarter of a million tons of concrete and a million tons of asphalt annually into construction products.

Toll road management forms the basis of a small sector of the Group's service offering.

Murray & Roberts has established a new presence in building materials and will engage the domestic housing market from this platform.

Capabilities:

- Steel
- Infrastructure
- Services



■ Fabrication & manufacture

We are South African is a strategic commitment that has focused the Group's profile in industrial manufacturing. We operate exclusively from South Africa, serving selected domestic and global markets.

Murray & Roberts has limited its involvement in this sector to selected areas of the market that support the supply of world class specialist engineered products.

Investment in manufacturing capacity leverages the Group's skills in engineering, contracting and industrial design.

The companies in this sector of the business are important in the short-term but not core to Globalising Murray & Roberts.

Capabilities:

- Fabrication
- Manufacture
- Services

