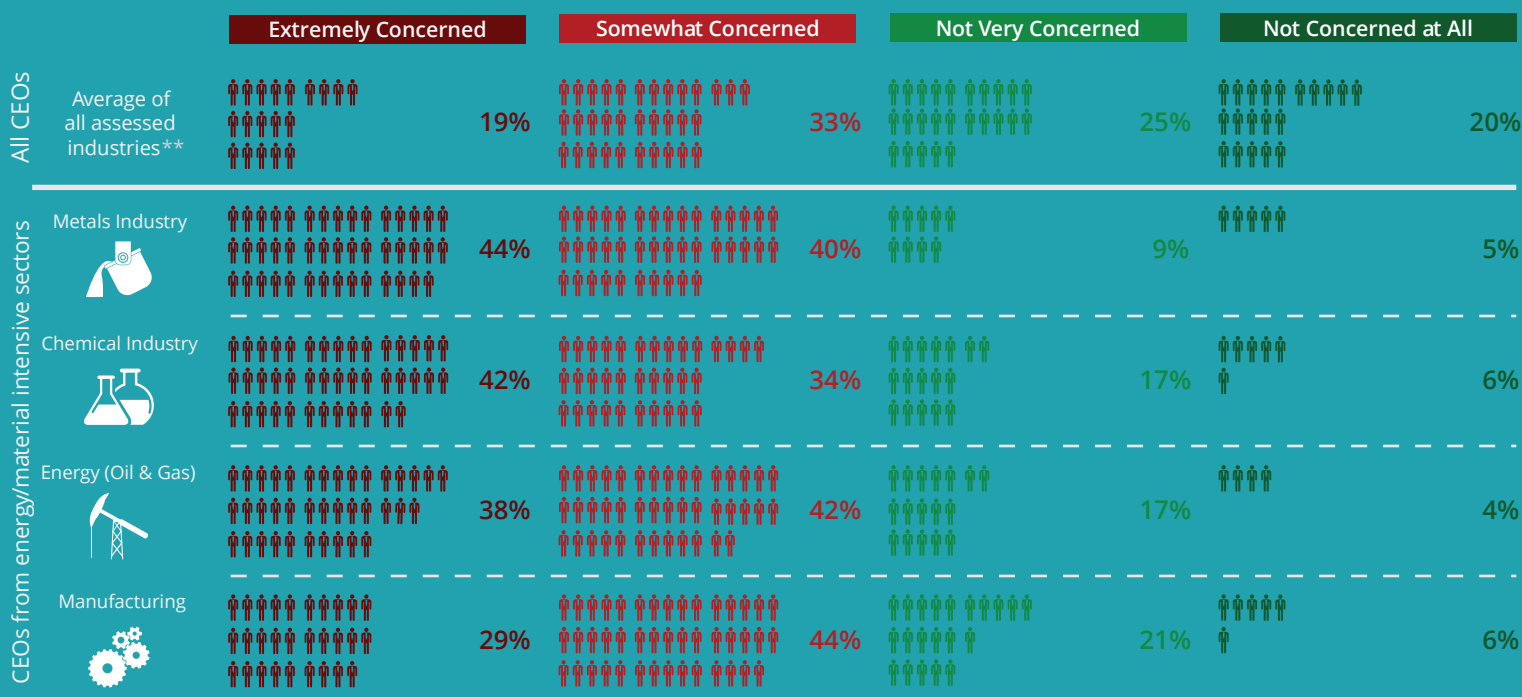


# CEOs AND RESOURCE SCARCITY

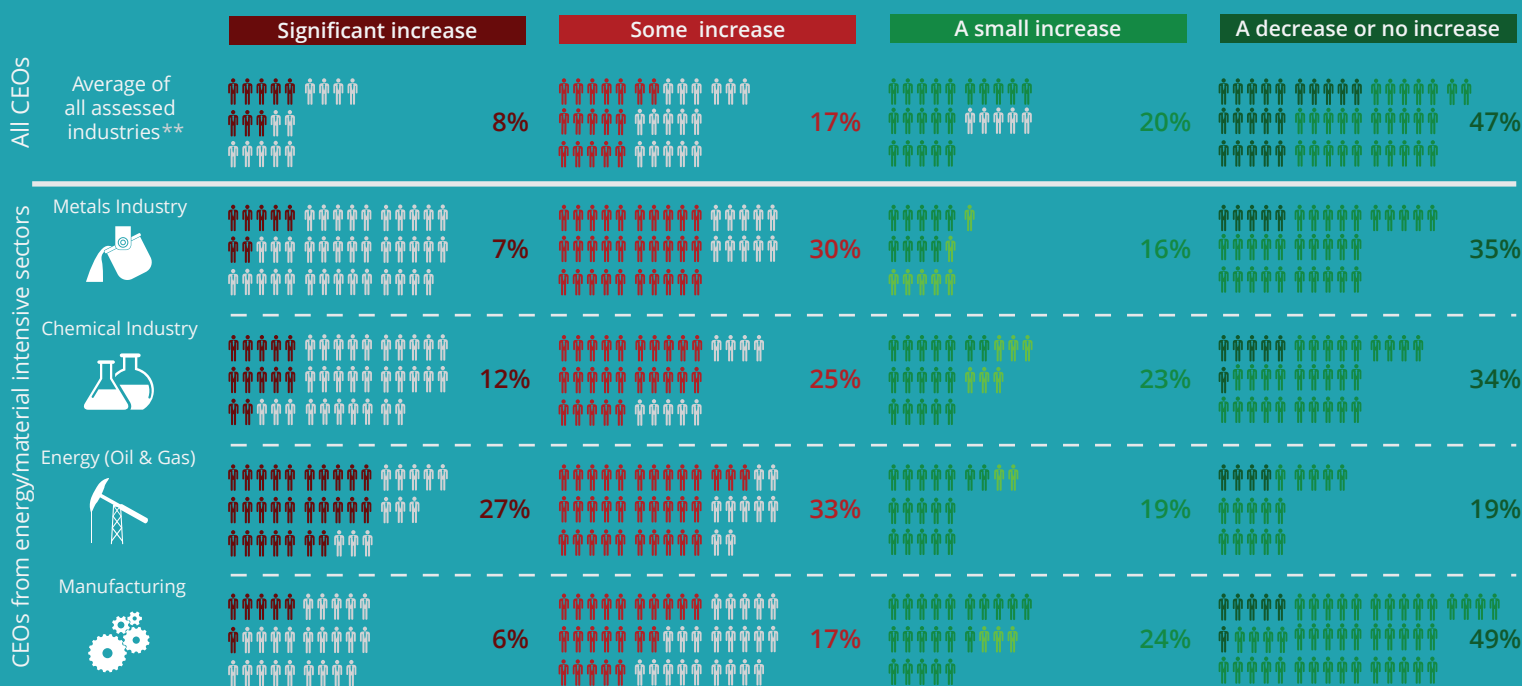
## CEOs are concerned about ENERGY and MATERIAL costs.

'How concerned are CEOs about the threat of energy and raw material costs to their growth prospects?'



## But are they acting (investing) accordingly...?

'How much do CEOs plan to increase their investment over the next three years to secure natural resources that are critical to their business'



\* Source: pwc's 16th Global CEO Survey (2013) - <http://www.pwc.com/gx/en/ceo-survey/index.jhtml>

\*\* Assessed Industries: Asset Management, Automotive, Banking & Capital Markets, Business Services, Chemicals, Communications, Consumer goods, Energy (Oil & gas), Engineering & Construction, Entertainment & Media, Forest, Paper & Packaging, Healthcare, Industrial Manufacturing, Insurance, Metals, Pharmaceuticals & Life Sciences, Power & Utilities, Retail, Technology, Transportation & Logistics