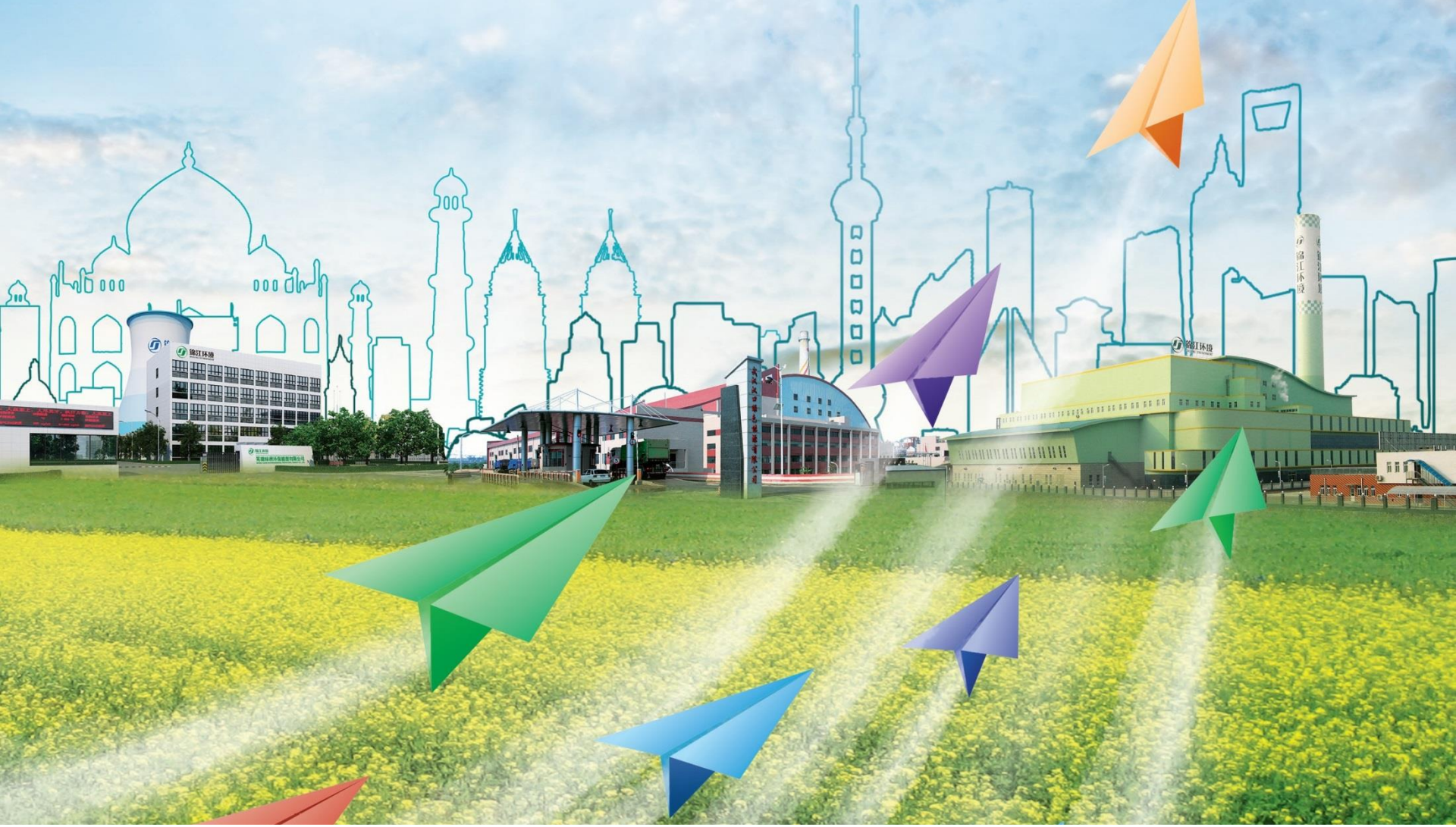


Annual General Meeting

Corporate Presentation

29 April 2019

锦江环境
JINJIANG ENVIRONMENT

Contents

1. Company Overview
2. Operational Highlights
3. Domestic Highlights
4. Overseas Highlights
5. Financial Highlights
6. Growth Strategy

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JINJIANG ENVIRONMENT

Company Overview



About Jinjiang Environment

- ✓ First mover and leader as well as the first private operator in the Waste-To-Energy (WTE) industry in the PRC
- ✓ Established PRC's first WTE plant using Circulating Fluidised Bed (CFB) incineration technology in 1998 and built a track record spanning over 20 years
- ✓ Listed on the mainboard of the Singapore Exchange on 3 August 2016
- ✓ As at 31 December 2018, 14 facilities out of 20 WTE facilities in operation are under BOO model

WTE Business

- **WTE facilities in operation: 20** in 12 provinces, autonomous regions and centrally-administered municipalities in the PRC
- **WTE facilities under construction & expansion:**
  - **6** in China, **1** overseas
- **WTE facilities in preparation stage:**
  - **18** in China, **4** overseas
- Presence in **India, Brazil, Indonesia and Singapore**
- **Current waste treatment capacity of 29,240 tons/day**
- When fully completed and acquired (China and overseas), **total capacity will increase to approximately 67,256 tons/day**

EMC business & Project technical and management service

- Current portfolio of **34** EMC projects, of which **28** have produced energy-saving results and the remaining **6** are undergoing construction
- **42** technical and management consulting service contracts

锦江环境 JINJIANG ENVIRONMENT

As at 31 December 2018

Key Milestones in FY2018

Established in 1998, Jinjiang Environment is the first private and a leading Waste-To-Energy (WTE) operator (by treatment capacity) in the PRC.

2018

Apr 2018

- **Entered Latin America market** with investment in Brazil's first ever WTE project
- **Private placement** of 214m new shares to Harvest Environmental Investment Fund to raise gross proceeds of S$107m
- Acquired **Hangzhou Zhenghui** Construction Engineering Co., Ltd. to establish an internal unified project management platform
- **Yinchuan Zhongke WTE Facility** Expansion Project in Ningxia Hui Autonomous Region Successfully Connected to Power Generation Trial Operation (waste treatment capacity of 1,000 tons/day)

Jun 2018

- **Entered Indonesian market** with acquisition of PT. Indo Green Power, which has secured a concession to construct, own and operate a WTE facility in Palembang, Indonesia
- Secured US$200m and RMB100m **syndicated term loan** led by Standard Chartered; won Standard Chartered's 2018 Best Loan Syndicate award

Jul 2018

- First phase of the **Linzi Domestic WTE Facility** in Shandong Province was successfully connected to the grid for power generation trial operation. The project used fuel preparation and high-parameter, high-capacity energy conversion technology to establish a **benchmark in WTE technology** (Phase 1 waste treatment capacity of 2,000 tons/day)
- Participated in the 2018 Singapore Environmental Summit.

Aug 2018

- Acquired **WTE PPP project** for municipal solid waste incineration power generation in Jinghong City, Yunnan Province
- Jinjiang Environment celebrated the **20th anniversary of the WTE industry** and organised a commemorative event named "Beautiful Jinjiang Green Memories".

Nov 2018

- Secured a PPP WTE project in the comprehensive treatment of soid waste in Leting County, Tangshan City, Hebei Province
- **Zhejiang Wenling** organic waste disposal project started, opened a new journey for the **ecological vein industrial park model.**

Dec 2018

- Secured EPC contract to construct Singapore's 1st **mechanical-biological waste treatment** project

锦江环境
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Leading Industry Development

Achieved Full Year Revenue of RMB3.03 billion



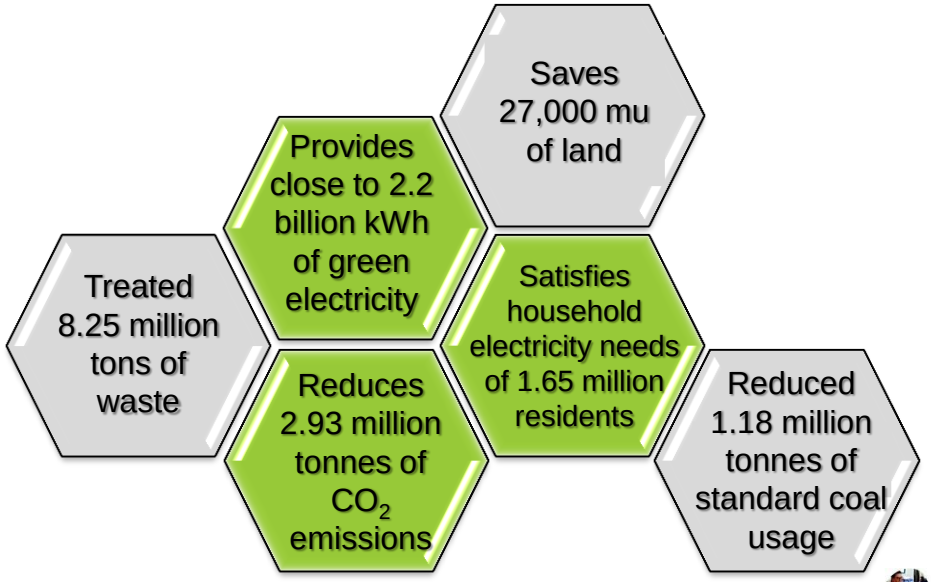
RMB57.8 billion
yoy▲48.0%

RMB1.81 billion
yoy▲2.3%

RMB645 million
yoy▲15.9%

- WTE Business
- BOT Construction
- EMC business & Project technical and management service

- **Total Assets RMB14.59 billion ▲14.5%**
- **Net Assets RMB5.58 billion ▲14.1%**
- **Total Revenue RMB3.03 billion ▲11.6%**

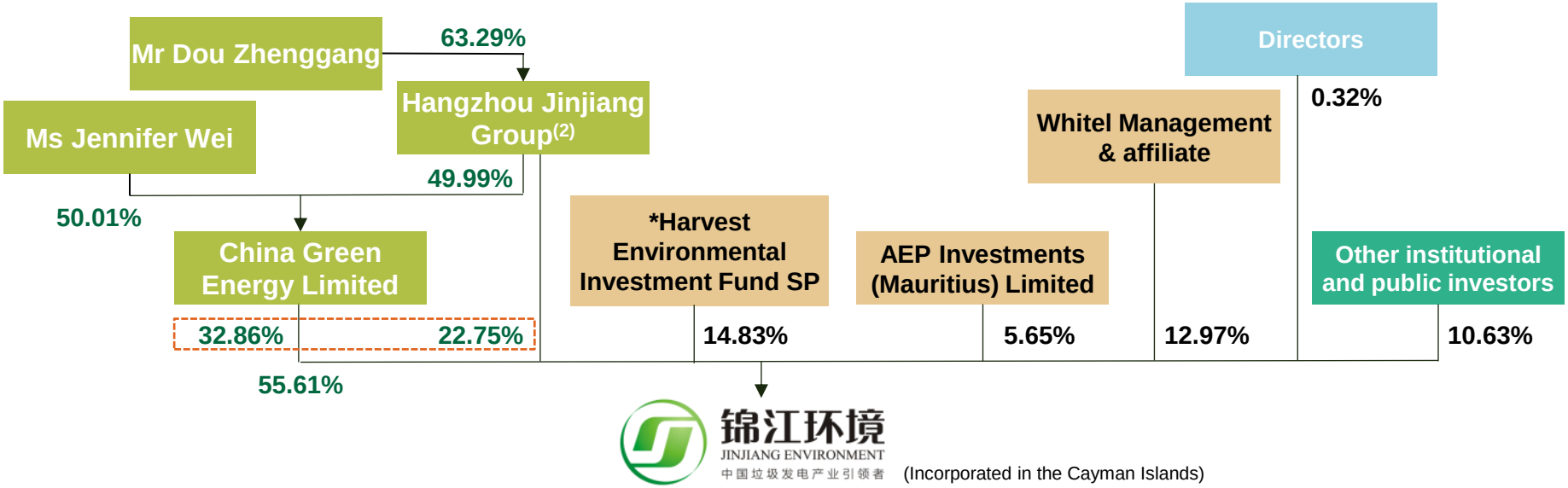


锦江环境
JINJIANG ENVIRONMENT

截至2018年12月31日

Strong Shareholding Structure

Strong shareholder background provides firm support for company's development(1)



China Green Energy Limited

- China Green Energy is an affiliate of the Hangzhou Jinjiang Group
- The Jinjiang Group is China's top 500 private enterprise, engaging in environmental protection & energy, non-ferrous metal and chemicals business

Harvest Environmental Investment Fund SP

- A fund managed by Harvest Global Capital (Cayman) Investments Limited, a wholly-owned subsidiary of Harvest Global Capital Investments Limited

AEP Investments (Mauritius) Limited

- A fund wholly owned and managed by Olympus Capital
- Olympus Capital is US-based private equity, founded in 1997

Whitel Management Company Limited

- An affiliate of Hopu Investments

Other institutional investors(3)

- Company's shares are subscribed by many renowned institutional investors during IPO, including Great Eastern Life (Malaysia), Hailiang International and UOB AM

(1) Based on 1,443,246,800 shares as of 31 December 2018
(2) Through wholly-owned subsidiary
(3) Based on SGX's announcement on 3 August 2016



Operational Highlights



Extensive Portfolio in the PRC with Growing Overseas Footprint

Jinjiang Environment	
Total Capacity	**67,256 tons/day**

China Projects

No. of projects	Project Category	Capacity
24	Operational (including 4 resource recycling projects)	29,240 tons/day
6	Construction & Expansion	8,670 tons/day
8	Upgrading	5,000 tons/day
18	Preparatory (existing)	16,250 tons/day
6	Resource recycling	3,000 tons/day
Total		**62,160 tons/day**

India Projects

No. of Projects	Project Category	Capacity
2	Preparatory	2,106 tons/day
1	Construction	1,165 tons/day
Total		**3,271 tons/day**

Brazil Project

No. of Projects	Project Category	Capacity
1	Preparatory	825 tons/day
Total		**825 tons/day**

Indonesia Project

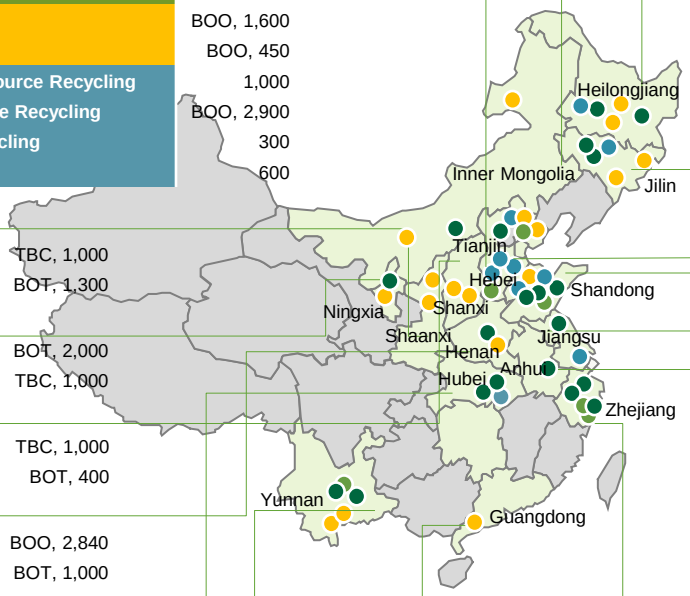
No. of Projects	Project Category	Capacity
1	Preparatory	1,000 tons/day
Total		**1,000 tons/day**

As at 31 December 2018

Our Extensive Footprint in China

Installed Capacity (ton/day)

● In Operation ● Under Preparation ● Under Construction or Expansion ● Waste recycling projects



Inner Mongolia

Hohhot New Energy	BOO, 1,000
Manzhouli Green Energy	BOO, 500
Bayannao'er	BOT, 700

Heilongjiang

Suihua Green Energy	BOO, 800
Qitaihe Green Energy	BOO, 1,000
Tonghe	TBC, 600
Shangzhi	TBC, 600
Suihua Green Energy	240

Jilin

Jilin Xinxiang	BOO, 1,690
Songyuan Xinxiang	BOT, 1,050
Baishan Green Energy	BOO, 600
Hunchun Green Energy	BOO, 800
Songyuan Xinxiang New Energy Resource Recycling	

Hebei

Shijiazhuang Jiasheng	BOO, 2,400
Tangshan Jiasheng	BOO, 1,000
Tangshan Guye	BOO, 1,600
Leting	BOO, 450
Shijiazhuang Jiasheng Wuji Resource Recycling	1,000
Shijiazhuang Gaocheng Resource Recycling	BOO, 2,900
Tangshan Qianxi Resource Recycling	300
Luannan Resource Recycling	600

Tianjin

Tianjin Sunrise	BO, 1,100

Shandong

Zibo Green Energy	BOO, 1,200
Gaomi Lilangmingde	BOT, 800
Zibo New Energy	BOO, 2000
Zibo New Energy	BOO, 2,000
Wudi Jiasheng	BOT, 1,000
Zibo Gaoqing Resource Recycling	500
Zichuan Resource Recycling	400

Shaanxi

Yulin Green Energy	TBC, 1,000
Yan'an	BOT, 1,300

Ningxia

Yinchuan Zhongke	BOT, 2,000
Zhongwei Green Energy	TBC, 1,000

Jiangsu

Lianyungang Sunrise	BOO, 1,450
Kunshan Jinkang	160

Shanxi

Lvliang Green Energy	TBC, 1,000
Shanxi Taigu	BOT, 400

Anhui

Wuhu Jinjiang	BOO, 2,200

Henan

Zhengzhou Xingjin	BOO, 2,840
Linzhou Jiasheng	BOT, 1,000

Zhejiang

Xiaoshan Jinjiang	BOO, 1,300
Zhejiang Zhuji	BOO, 1,050
Wenling Green Energy	BOT, 800
Wenling Green Energy Expansion	BOT, 800
Wenling Organic Waste Project	BOT, 220

Hubei

Wuhan Jinjiang	BOO, 2,600
Hankou Jinjiang	BOO, 2,000
Wuhan Resource Recycling	3,000

Yunnan

Yunnan Wuhua	BOO, 1,200
Yunnan Energy	BOT, 1,000
Yunnan Jinde	BOO, 1,000
Jinghong Jiasheng	BOT, 1,200
Yunnan Wuhua (Rebuilding in a different location)	BOT, 2,250

Guangdong

Gaozhou Green Energy	BOO, 1,500

锦江环境 JINJIANG ENVIRONMENT

As at 31 December 2018



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China Highlights



Upgrading and Expansion Project

Large-scale technical upgrading project involving some of CJE's presently operating WTE facilities when completed will significantly expand WTE capacity, increase operational efficiency, reduce emission levels and proportion of coal used

- Expand WTE Capacity
- Increase Operational Efficiency
- Reduce Emission Levels
- Reduce coal usage

- Number of WTE projects : **8**
- Expected capacity increase : **5,000 tons/day**
- Total CAPEX : Approximately **RMB1 billion** (as at end-Dec 2018, RMB530 million paid out to contractors)
- Project duration : **3Q2017 to end-2019**
- Waste management investment: 200,000 yuan/ton (much lower than investing in a new facility)
- Project financing: Share placement which raised net proceeds of **S$106.9 million**

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Upgrading and Expansion Project (Progress Update)

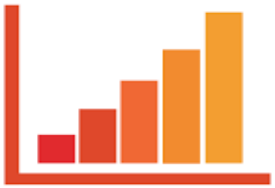
4Q 2018

✓ **2 WTE facilities completed upgrading**



- Zibo Green Energy
- Wuhan Jinjiang

✓ **Operational Improvements**



- Waste treated ↑6.7% qoq
- Electricity generated ↑7.7% qoq
- Electricity supplied ↑8.8% qoq

✓ **Positive Financial Impact**



WTE revenue (excluding BOT construction) ↑8.5%

End 2019

✓ **Completion of entire upgrading project**



✓ **Expected Operational Improvements**



- Operational efficiency ↑
- Emission levels of WTE facilities ↑
- Environmental protection efficacy ↑
- Coal blending ratio ↓

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Notable Project Highlights: Shandong Zibo New Energy WTE Facility

- ✓ Selected as a model science and technology project by the Ministry of Housing and the Ministry of Urban and Rural Construction.
- ✓ First high parameter (7.9MPa, 520 degrees Celsius) CFB* incinerator in China
- ✓ No other fuels are utilised in the mix for this project
- ✓ 4th WTE facility put into operation in Shandong Province
- ✓ Introduced German RW technology for dry sorting, the application of high-pressure high-pressure circulating fluidised bed incinerator in Finland, Germany's Siemens steam turbine and other advanced European technologies, and the use of more than ten core technology patents in Jinjiang environment



WTE Capacity: Original waste - 4,000 tons/day, RDF conversion - 2,000 tons/day
Model: BOO
Implemented technology: "bio-drying + mechanical sorting + high parameter CFB incineration boiler + flue gas treatment + leachate treatment + ash treatment"
Commencement of 1st Line of Operations: July 2018

Benefits

- ✓ Bring about considerable environmental protection and energy saving benefits while solving the problem of domestic waste in Linzi and nearby areas
- ✓ Able to achieve **annual standard coal savings of over 257,000 tons and carbon emission reduction of up to 178,000 tons**
- ✓ Provide formidable support to Zibo City in achieving their goal of reducing waste, turning waste into a resource and eliminating its toxicity

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* Circulating Fluidised Bed

Notable Project Highlights: Zhejiang Wenling Organic Waste Project

- ✓ Construction of the Wenling Organic Waste Project started, signalling a start for the development of the ecological vein industrial park model
- ✓ A smart comprehensive waste disposal project designed with the latest best-in-class technology

Waste Treatment Capacity: 150 tons/day for kitchen waste + 20 tons/day for drainage oil + 50 tons/day for manure
Model: BOT



- WTE
- Sludge Treatment
- Animal Welfare & Conservation
- Kitchen Waste Treatment
- Sewage Treatment
- Fly Ash Treatment

***1st phase operational in Feb 2016 (treatment capacity of 600 tons/day)**
2nd phase operational in 2019

- ✓ Promotes sharing of resources and the development of the industrial ecological chain through harmless waste treatment and the transformation of waste into resources with WTE facilities as the operational core
- ✓ Brings into effect synergistic treatment advantages to create a more economical and environmentally-friendly recycling ecological vein industrial park
- ✓ Attainment of zero emissions for the industrial park

Benefits

锦江环境 JINJIANG ENVIRONMENT

EMC business & Project technical and management service

EMC



Project Technical and Management Service



- **As of 31 December 2018**

<u>34 EMC projects have been implemented</u>

- 28 have achieved energy savings
- 6 projects are under construction and are expected to realise energy savings in 2019

<u>42 Project Technical and Management Services have been implemented</u>

- 4 newly signed Project Technical and Management Services contracts

<u>Added in 2018</u>

- 8 EMC projects
- 18 Project Technical and Management Services

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Acquisition of Hangzhou Zhenghui

- ✓ The Group acquired 100% equity interest of Hangzhou Zhenghui Construction Engineering Co., Ltd. for RMB15,976,700 (approximately S$3,336,500) in April 2018.

About Hangzhou Zhenghui

- ✓ Hangzhou Zhenghui is engaged in the provision of engineering, design, construction, project management, and engineering-related consultancy services within and outside the PRC.

Benefits

Forms an in-house platform with integrated design, engineering and construction capabilities, enabling the Group to:

- Undertake domestic and foreign design, consulting, EPC, construction and other engineering projects
- Obtain new service contracts in this field
- Promote further technical cooperation between the Group and third parties at home and abroad

In 2018, project technology and management services and EMC business revenue increased by 48.0% to RMB 578 million (including the revenue increase brought about by the Hangzhou Zhenghui acquisition)



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Awards & Accolades in 2018

- Domestic boiler GB/T34552-2017 awarded "**Excellent Standard**" by the National Technical Committee for Urban Environmental Sanitation Standardisation
- Second year being recognised as **Top Ten Influential Enterprises in China's Solid Waste Industry**
- **Leading Enterprise** in China's Strategic Emerging Environmental Protection Industry in 2018
- Received **"Best Syndicated Loan" Award** from Standard Chartered Bank in 2018



- Hangzhou Kezhen Energy won the title of "**National High-tech Enterprise**"
- Green Energy (Hangzhou) Corporate Management awarded title of **pilot demonstration enterprise** of Zhejiang Province manufacturing industry and Internet integration development in 2018 and **patent demonstration enterprise** of Lin'an District, Hangzhou in 2018
- Wuhan Jinjiang WTE Facility in Hubei Province was awarded "**Harmonious Enterprise of Wuhan City**" by Wuhan Municipal People's Government
- Shijazhuang Jiasheng WTE Facility in Hebei Province awarded **"Advanced Project Construction Unit of 2018"** by Wuji County People's Government

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Overseas Highlights

Building a presence in India

Gurgaon integrated waste management project	
Location	Gurgaon, Haryana
Area	27.83 acres
Capacity	1,165 tons/day
Business Model	BOT model (22-year concession period)
Waste Subsidies	WTE Facility before operation: 1000INR/ton (approx 100 RMB/ton*) WTE Facility in operation: 333INR/ton (approx 33RMB/ton*)
On-grid electricity price	10.91INR/kWh (approx 1.091 RMB/kWh*) (fixed electricity price: 7.05INR/kWh & government subsidy: 3.86INR/kWh
Collection Coverage[1]	60%

Project Scope:

- Collection and transportation of MSW from households and businesses
- Pre-treatment and mechanical separation of MSW
- Treatment of biodegradable waste by composting
- Recycling and sale of waste materials
- Production and sale of Refuse Derived Fuel (RDF)
- Power generation from combustion of RDF
- Operation and maintenance of a landfill for residual inert waste components



Project Progress

- India's garbage collection and delivery projects have been put into normal operation.

- In 2018, the Gurgaon WTE project had its groundbreaking ceremony.

Lucknow integrated waste management project	
Location	Lucknow City, the capital city of Uttar Pradesh
Area	104 acres
Capacity	1500 tons/day
Business Model	BOT model (30-year concession period)
Waste Subsidies	1,604 INR/ton (approx 160 RMB/ton*)
On-grid electricity price	7.5 INR/kWh
Collection Coverage[1]	45%

Gwalior integrated waste management project	
Location	Gwalior, Madhya Pradesh
Area	63.75 acres
Capacity	606 tons/day
Business Model	BOT model (21-year concession period)
Waste Subsidies*	1,701 INR/ton (approx 170 RMB/ton*)
On-grid electricity price*	6.39 INR/kWh (average price) (approx 0.64 RMB/ton*)
Collection Coverage[1]	53%

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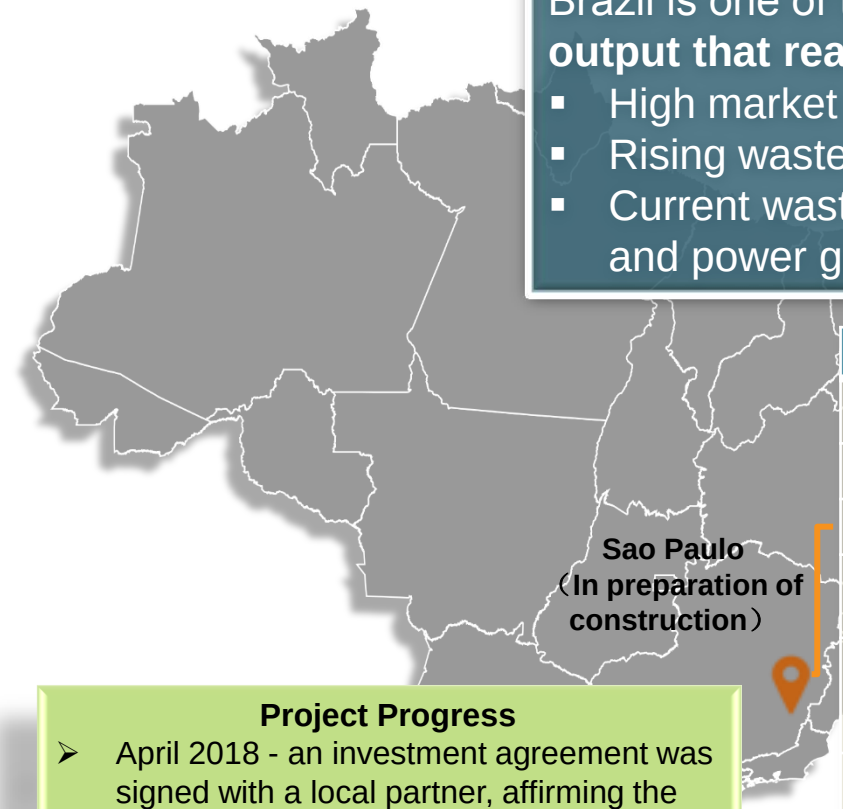
[1]As at 31 December 2018

Based on the exchange rate of 1 RMB = 10 INR (Indian Rupees)

Foray into Brazil

Brazil is one of the "**BRIC Five Countries**" with an **annual waste output that reaches as high as 83 million tons**

- High market potential for waste treatment
- Rising waste production levels and collection rates
- Current waste disposal method is landfill; no waste incineration and power generation facilities



Barueri WTE Project	
Location	Sao Paulo, most populated city in Brazil
Acquired	20 April 2018
Capacity	825 tons/day
Business Model	BOT (commissioned in December 2020, 30-year PPP concession period, 15-year electricity trading concession period
Waste subsidies	300 tons: about 117.7 real / ton (approx RMB196/ton*), the other 525 tons about 90 real / ton (approx RMB150/ton*) , according to the annual inflation index price adjustment
On-grid electricity price	Electricity price in May 2018: R$0.290/KW (approx RMB0.48/KW*), and annual price adjustment according to the price index of the five major power companies (PPA agreement purchase amount 11.5MW, 15 years)
Total Investment	360 million real (approx RMB600 million*)

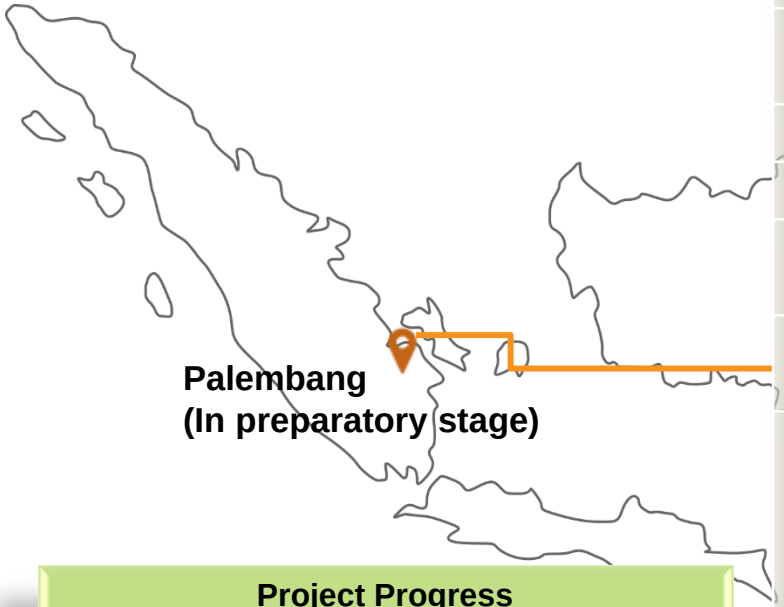
Project Progress

- April 2018 - an investment agreement was signed with a local partner, affirming the relationship between the two parties.
- August 2018 - the establishment of the Brazilian investment platform company was completed.
- Loan application made to local banks.

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Based on the exchange rate of 1 RMB = 0.6 real (Brazilian Real)

Debut in Indonesia



Project Progress

- Currently settling pre-construction procedures and approvals.
- A franchise agreement has been signed with the Palembang City Government. Currently in active negotiations with the Indonesian State Power Corporation to sign the PPA as soon as possible.

Palembang WTE Project	
Acquired	June 2018
Method	Acquired 95.0% stake in Indonesian Green Energy Co., Ltd.
Investment	120,000,000 USD
Capacity	1,000 tons/day
Business Model	BOO (30 years concession period from start of operation)
Waste Subsidies	US$22/ton
On-grid electricity price	According to the "**Presidential Regulations of the Republic of Indonesia**" No. 35, 2018 on WTE, if the total installed capacity of the project is less than or equal to 20MW, the benchmark electricity price is US13.35 cents/KWH; if the total installed capacity is greater than 20MW, the benchmark electricity price is calculated based on US14.54cents/KWH - (0.076* Internet power)
Advantage	• Largest port and trade centre in South Sumatra • Ninth most populous city in Indonesia • Aug-Sep 2018 – Palembang will hold the 2018 Asian Games together with Jakarta, the capital of Indonesia • Significant market potential for waste treatment

Debut in Singapore

Singapore MBT Project	
Contract	Contracted to provide EPC services and management of operations and maintenance to **Singapore's 1st MBT plant** (5th in Asia)
Owner of plant	MBT plant is owned by JE Synergy Pte Ltd (Joint Venture between Jinjiang Group and Eastern Green Power
Project Duration	**Until 31 March 2020**
Concession Period	20 years
Capacity	500 tons/day
Contract Sum	S$66,563,000





Tuas South Ave 2, Singapore
新加坡大士南路2号

Project Progress

- The EPC Agreement was approved by the shareholders on 31 December 2018.

Benefits

- ✓ A cornerstone of the Group's future overseas collaborations, supporting its plans to expand overseas and become a global leader in the WTE industry
- ✓ Ability to apply its capabilities and know-how honed from long track record of EPC projects
- ✓ Being the 1st MBT project in Singapore, it is a high-profile demonstration of JE Synergy Engineering's engineering and construction capabilities
- ✓ Builds credentials to secure similar EPC projects in future

锦江环境 JINJIANG ENVIRONMENT



Financial Highlights

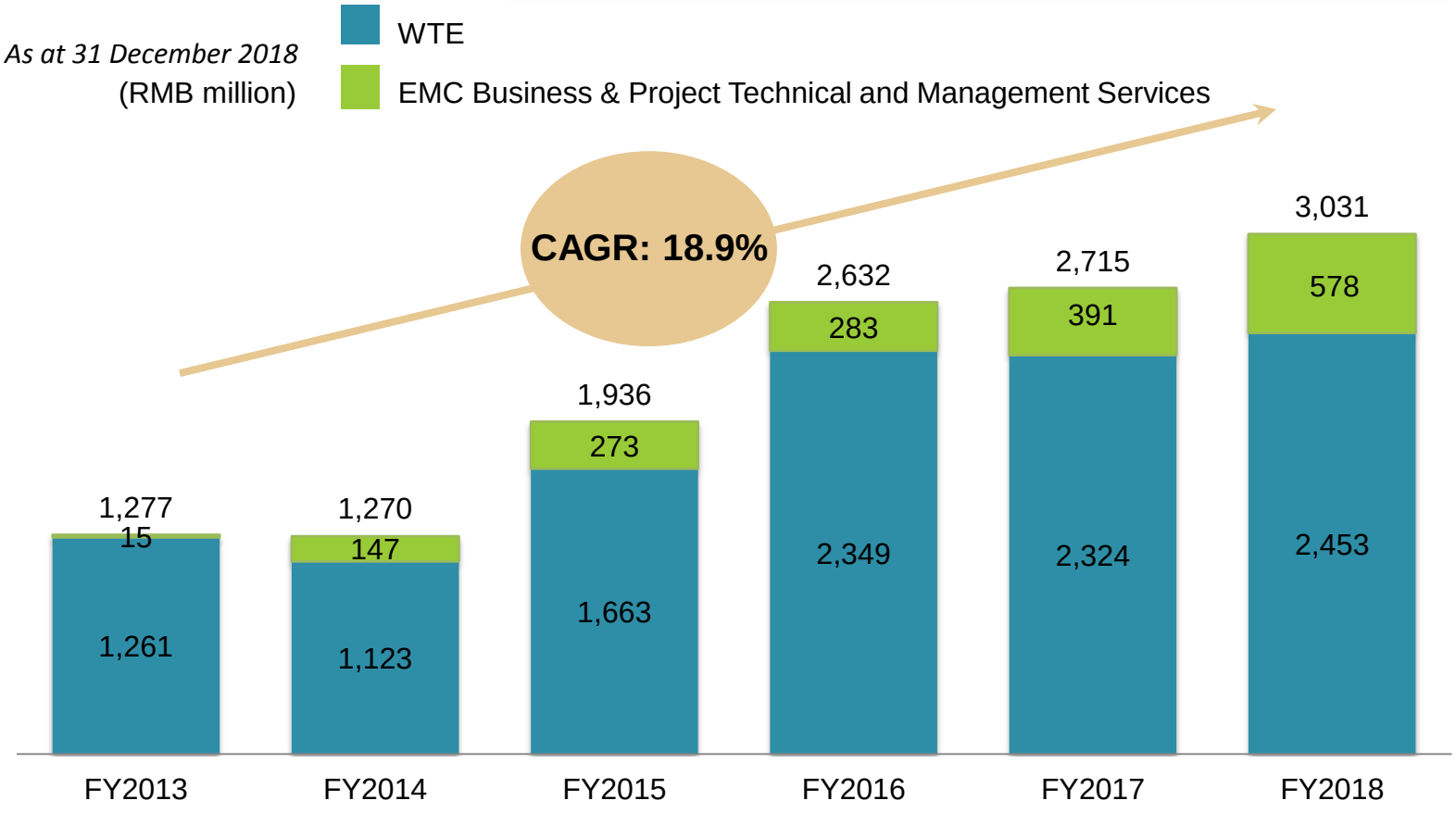


Achieving Strong Revenue Growth

Revenue Breakdown

WTE business is the main revenue contributor

As at 31 December 2018
(RMB million)

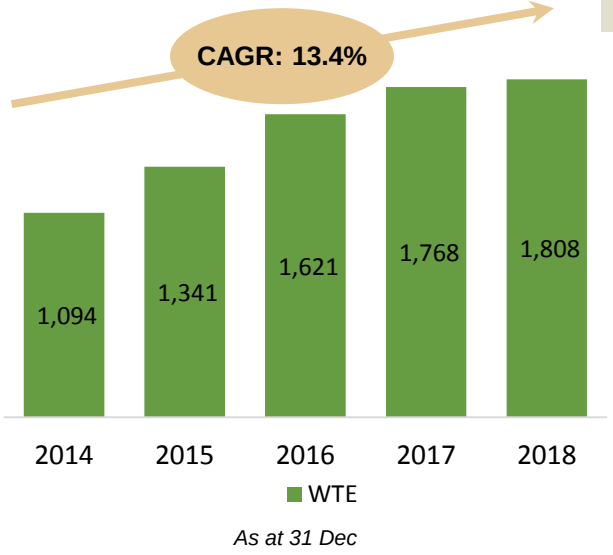


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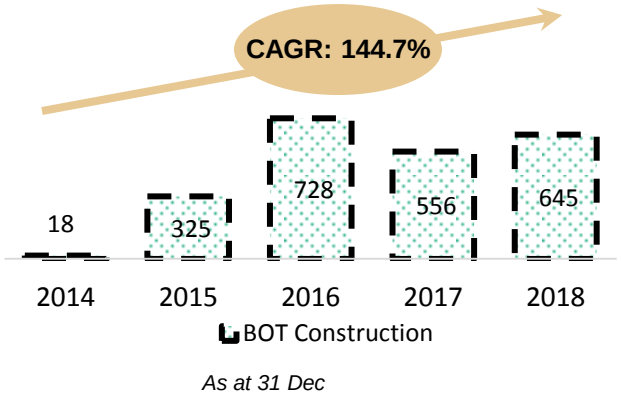
For the financial year ended 31 December

Achieving Strong Revenue Growth

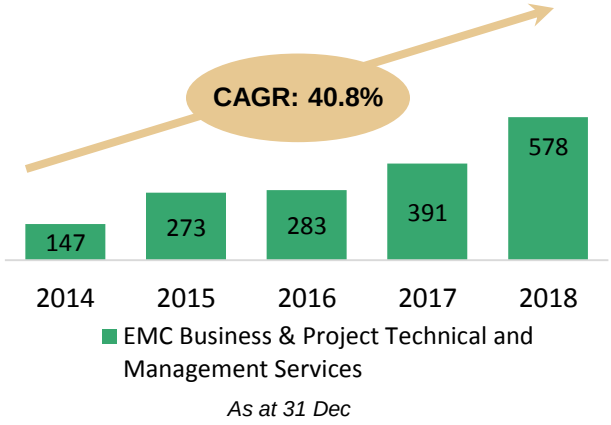
Segment Revenue (RMB million)



As at 31 Dec



As at 31 Dec



As at 31 Dec

The revenue change in WTE due to:

- Expansion and upgrading of 8 power plants reduced revenue due to lower amount of waste treated and electricity generated
- Commencement of waste collection and transportation operations in India
- Increase in steam supplied from Zhuji Bafang WTE Facility increased steam sales

Strong BOT Construction Services performance due to:

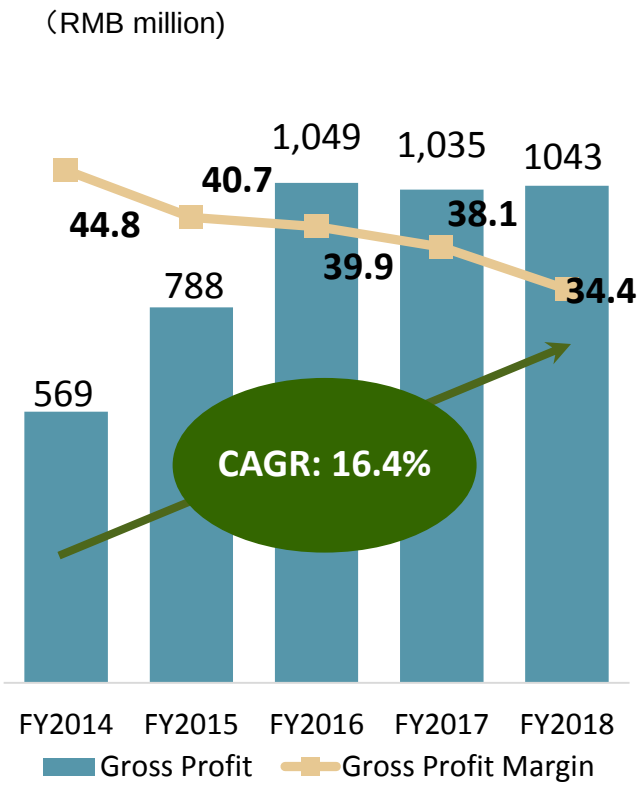
- Addition of BOT construction projects including Wenling, Suihua, Kunming Wuhua and projects in India
- Financial income under the concession service increased by 29.8% year-on-year to RMB 37.76 million

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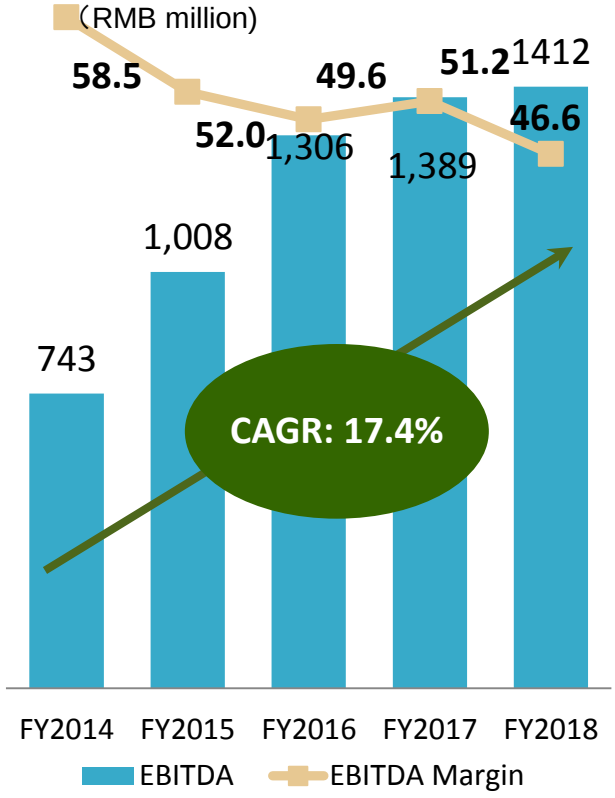
Stable Profitability

For the financial year ended 31 December

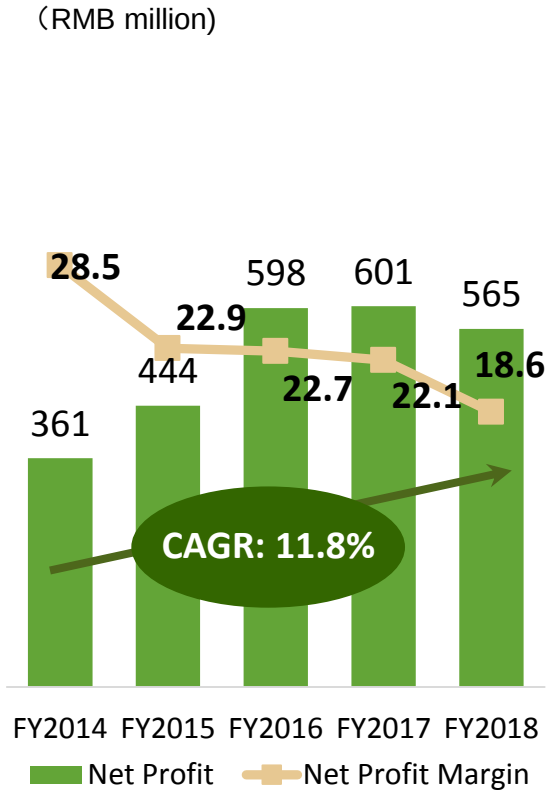
Gross Profit & Gross Profit Margin



EBITDA* & EBITDA Margin

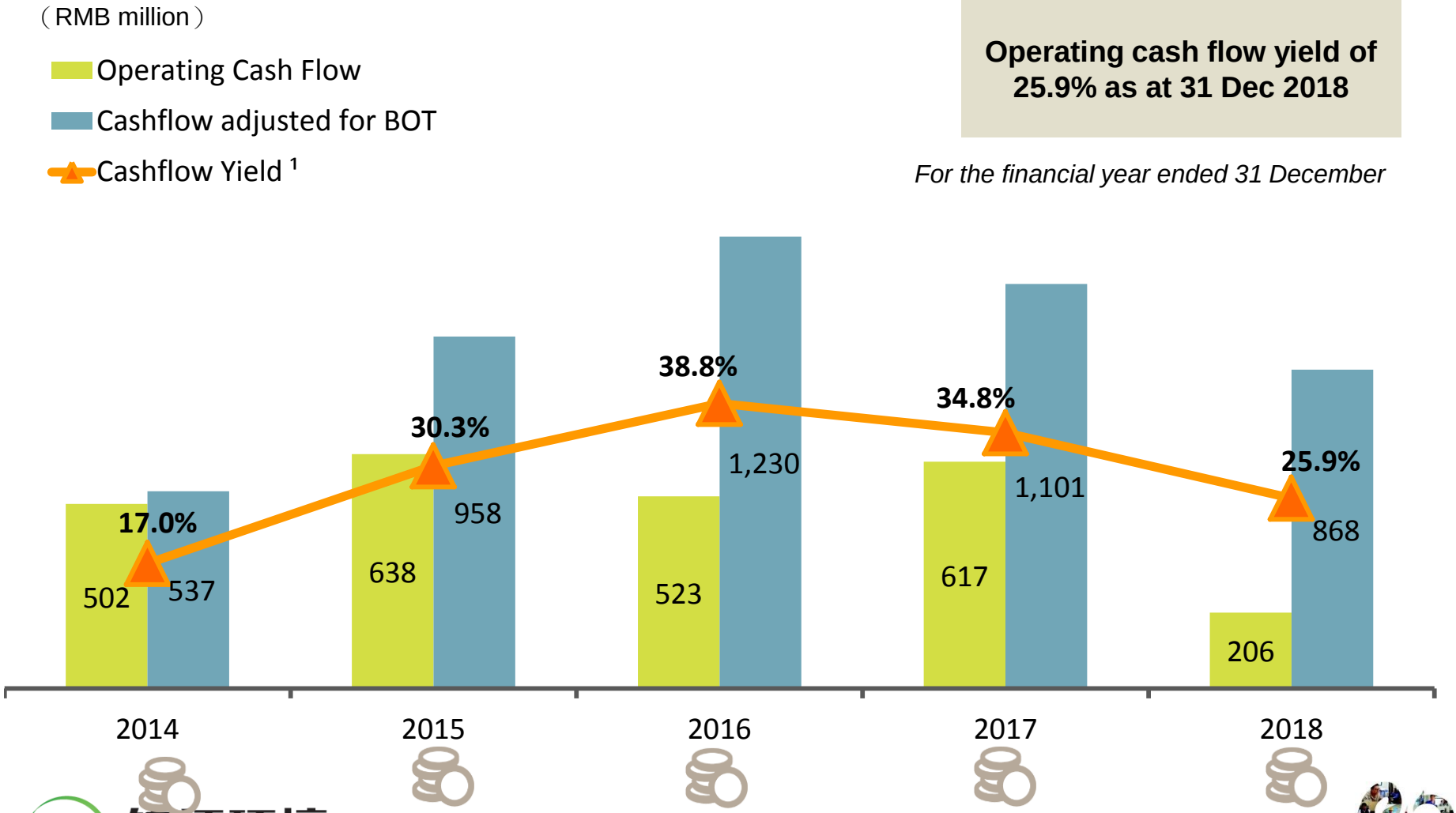


Net Attributable Profit & Profit Margin



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Healthy Operating Cash Flow



Operating cash flow yield of 25.9% as at 31 Dec 2018

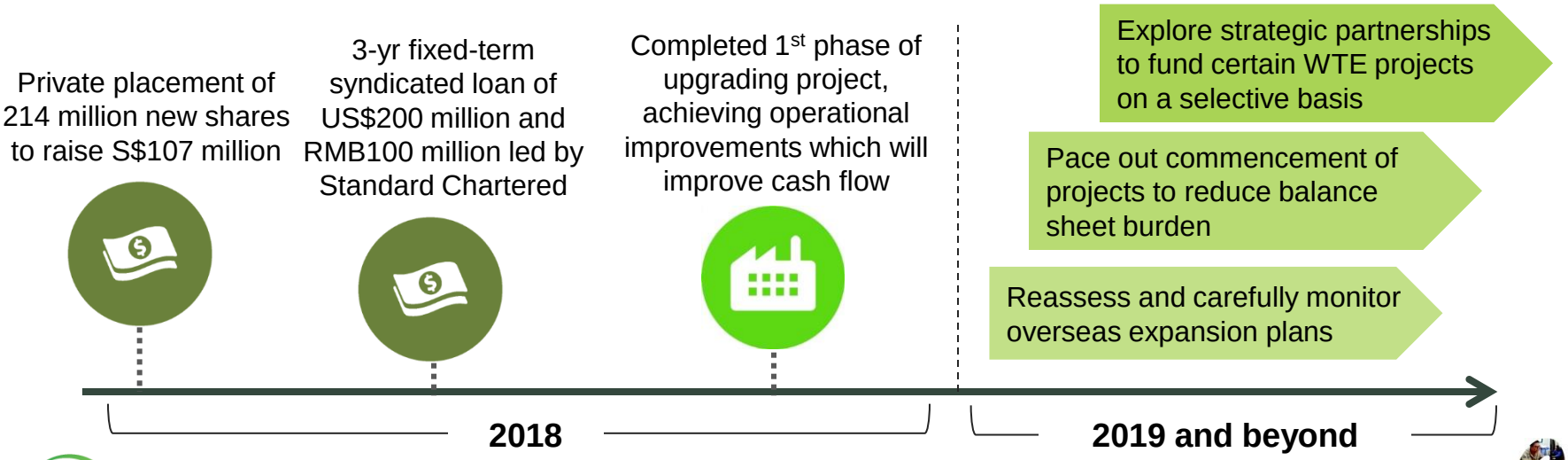
For the financial year ended 31 December

[1] Market cap of S$663.9 million and exchange rate of S$1 : RMB5.05 as at 31 December 2018

Prudent Capital Management

Our Capital Management Policy

- Adoption of a flexible financing policy and aims to maintain a diverse set of funding options
- Annual repayment and rolling over of a large proportion of short term working capital loans
- 30:70 equity-to-debt ratio maintained for WTE facility CAPEX
- Spacing out of CAPEX based on work plans
- Target gearing ratio at 60-65%



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Growth Strategy



In the future, we will …

Complete the upgrading and capacity expansion project

Completion of the upgrading capacity expansion project of 8 operating power plants by the end of 2019

Construction projects

Consolidate existing resources, reasonable allocation of operational management costs



Set higher specific standards in providing access to environmental protection facilities

- Create an open system with free access
- Pursuit of higher quality and diversity

On-time completion and delivery of projects

- Second line of Linyi Power Plant (Zibo City, Shandong Province)
- Fengrun Domestic Waste Incineration Power Generation Project (Tangshan City, Hebei Province)
- Shijiazhuang Biomass Incineration Power Generation Project (Hebei Province) (1st phase operational)
- Kunming Wuhua Remote Reconstruction Project (Yunnan Province)
- Zhejiang Wenling Waste Power Generation Phase II Expansion Project
- Wenling Organic Waste Comprehensive Disposal Project

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In the future, we will …

1. Maintain leading market position

- Expanding waste treatment capacity of existing facilities
- Through organic and inorganic growth opportunities

2. Continuously improve technical capabilities

- Adopting advanced pre-treatment technologies from Europe, in synergy with our own
- Enhancing operating efficiency and reduce emissions at our WTE facilities



3. Diversifying in the WTE value chain

- Expanding our WTE business to related areas such as sludge treatment
- Growing our EMC and third party project management businesses
- Leverage on Hangzhou Zhenghui's capabilities to take on more projects

4. Steady international expansion

- Seeking project opportunities from the "Belt and Road Initiative"
- Specific focus on Southeast Asia and other developing countries
- Enhancing our brand image and international recognition



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Thank You

