

Smart chemistry and AI for a sustainable future

Maurizio Turci

Italmatch Chemicals
Group CFO & General Manager



**Italmatch
Chemicals**

Italmatch's highlights: our growth in less than 30 years



30 > +1100
Employees



20M > ~700M€
Revenue



1 > 20
Plants



0 > 8 **~100**
R&D **FTEs in**
centers **innovation**



17 M&A **8** Private
since 2007 Equity



10 > +2000
Customers, partners
and suppliers



SCIENCE
BASED
TARGETS



FAIRWAGE
NETWORK

Relentless
Focus on ESG



Italmatch
Chemicals

Group rebranding
and new marketing
positioning

1

Macroeconomics

2

Digitalization

3

People

4

Cybersecurity

5

Sustainability

Big Data world - Digital and AI as “not optional?” roadmap

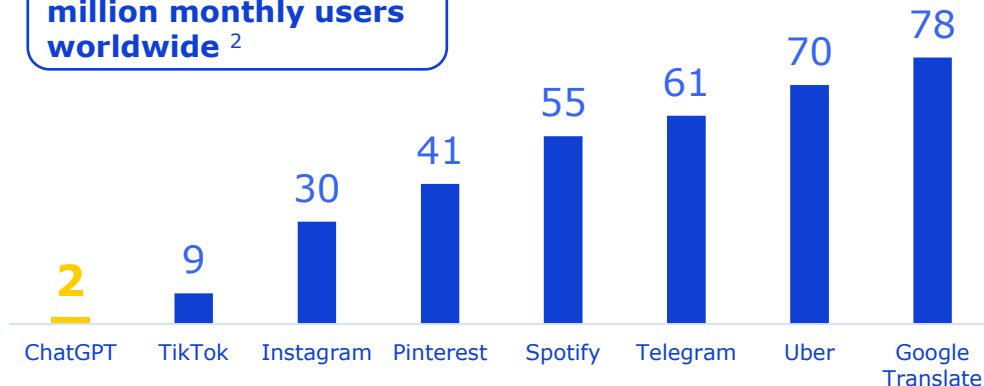

>180
zettabytes

Data produced worldwide in 2026

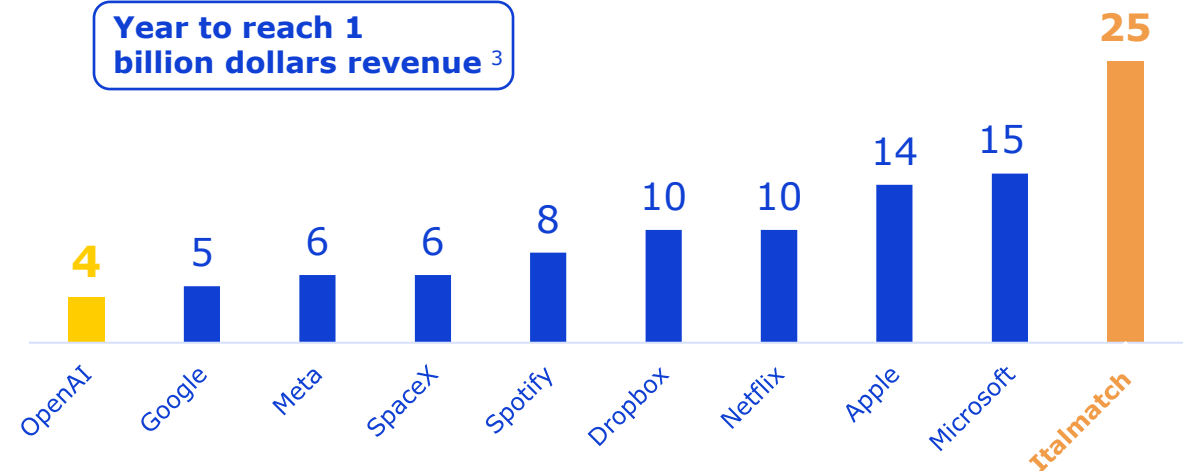
Data produced by **Italmatch** is around **85TB**.

Only **30% of global data** are analyzed ¹

Months to reach 100 million monthly users worldwide ²



Year to reach 1 billion dollars revenue ³



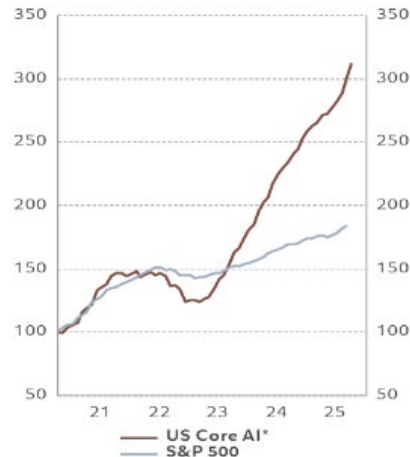
Source: 1: True Global Intelligence; 2: McKinsey report, calculation by The European House - Ambrosetti su dati di mercato, 2024; 3: Ambrosetti su dati Statmuse, 2024 and The European House - Ambrosetti su dati Financial Times, 2024

AI Market indicators: industrial bubble but huge benefits to society?

Green Flags

- Leadership in profit generation
- Boom in capital investments, financed through free cash flow

12m Forward earnings

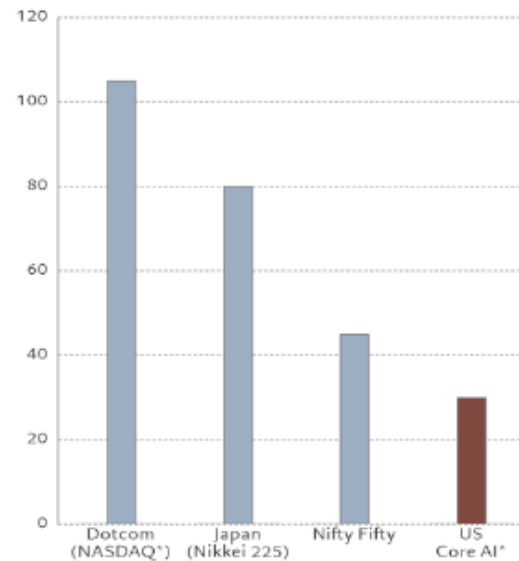


* Core AI: NVIDIA, Microsoft, Broadcom, Meta, Amazon, Alphabet, Oracle, Palantir, AMD, Arista, Micron Tech, Applied Materials, LAM, KLA, Synopsys, Intel, Cadence Design, Marvell, Monolith Power, Dell, HPE, Pure Storage, SMC, Teradyne, Entegris.

Amber Flags

- High valuations, but not extreme
- Core AI stocks listed in the US trade at 30 times earnings

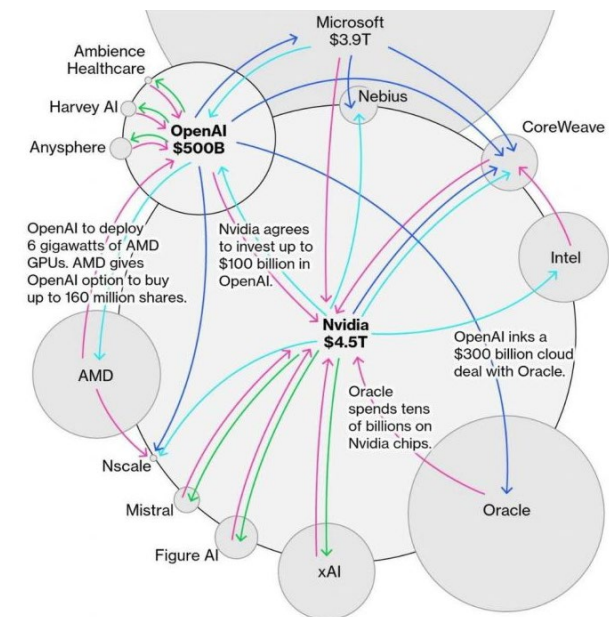
Price/Earnings Peaks



Red Flags

- Circularity of investments
- Extreme market concentration. Ethics? (supplier financing)

Circular investments



AI - Sustainability Paradox: the three dilemmas

Organizational dilemma

Human capital vs technology

15%

Of the global workforce could be affected by AI developments by 2030
(McKinsey report)

92M

jobs might be eliminated by 2030 but...

170M

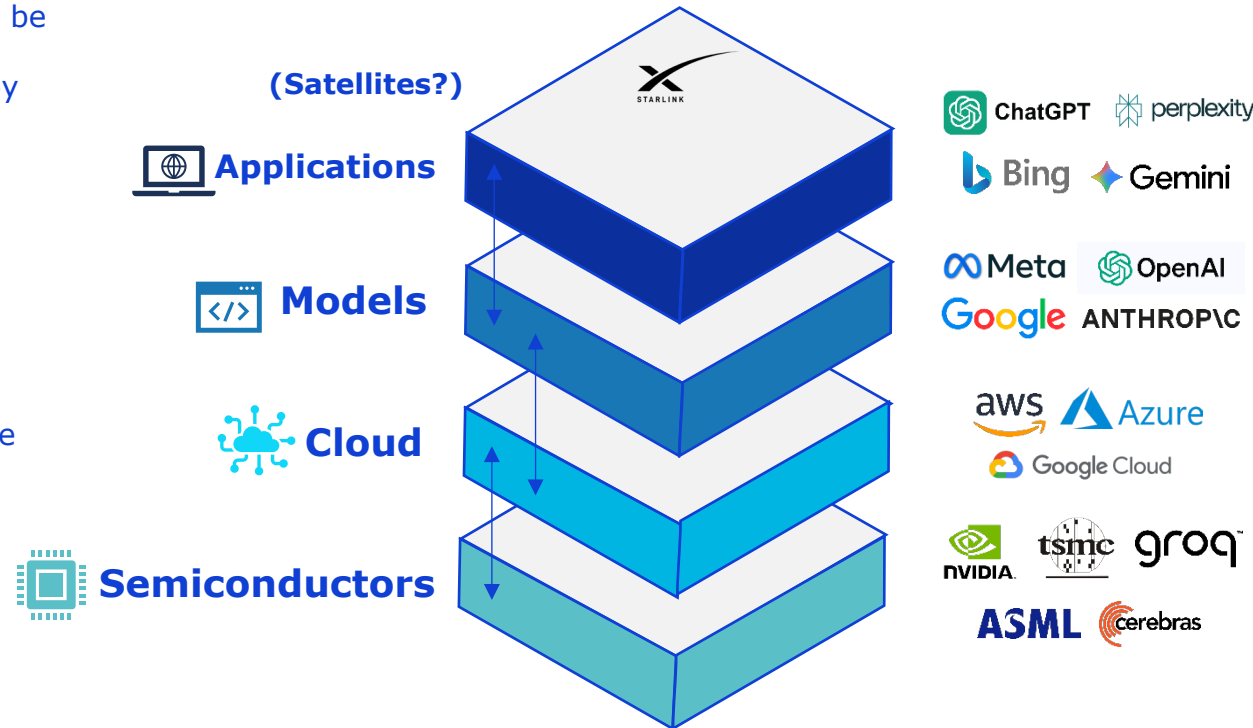
new roles will be created because of AI

The challenge for organizations is how intentionally, inclusively and sustainably it is designed.

Source: World Economic Forum Future of Jobs Report 2026

Ethical dilemma

AI stack, algorithmic bias and discrimination



Technological dilemma

Source code, privacy and safety

Open source vs closed source

Open

deepseek, Grok, LLaMA

Closed

ChatGPT, Gemini, Claude

The Global AI Governance Paradox

AI operates at the intersection of geopolitics, high tech, economics, human rights, and ethics. A broad global consensus agrees that without human governance, AI risks turning into an unpredictable entity rather than a shared asset. Despite warnings, the two global powers (USA and China).



Leading AI figures (Anthropic, OpenAI, SpaceXAI) and United Nations warn of existential threats to critical infrastructure and democratic institutions. Calls to buy time and build human-driven guardrails before AI reaches autonomous scale.



**Laissez-faire
Market-driven
Big Tech**

"Winner-takes-all" approach; rejection of regulatory brakes as self-sabotage: "don't kill the golden goose"



**Compliance
Regulation
Risk-based**

*AI Act;
Privacy, regulation
and governance*

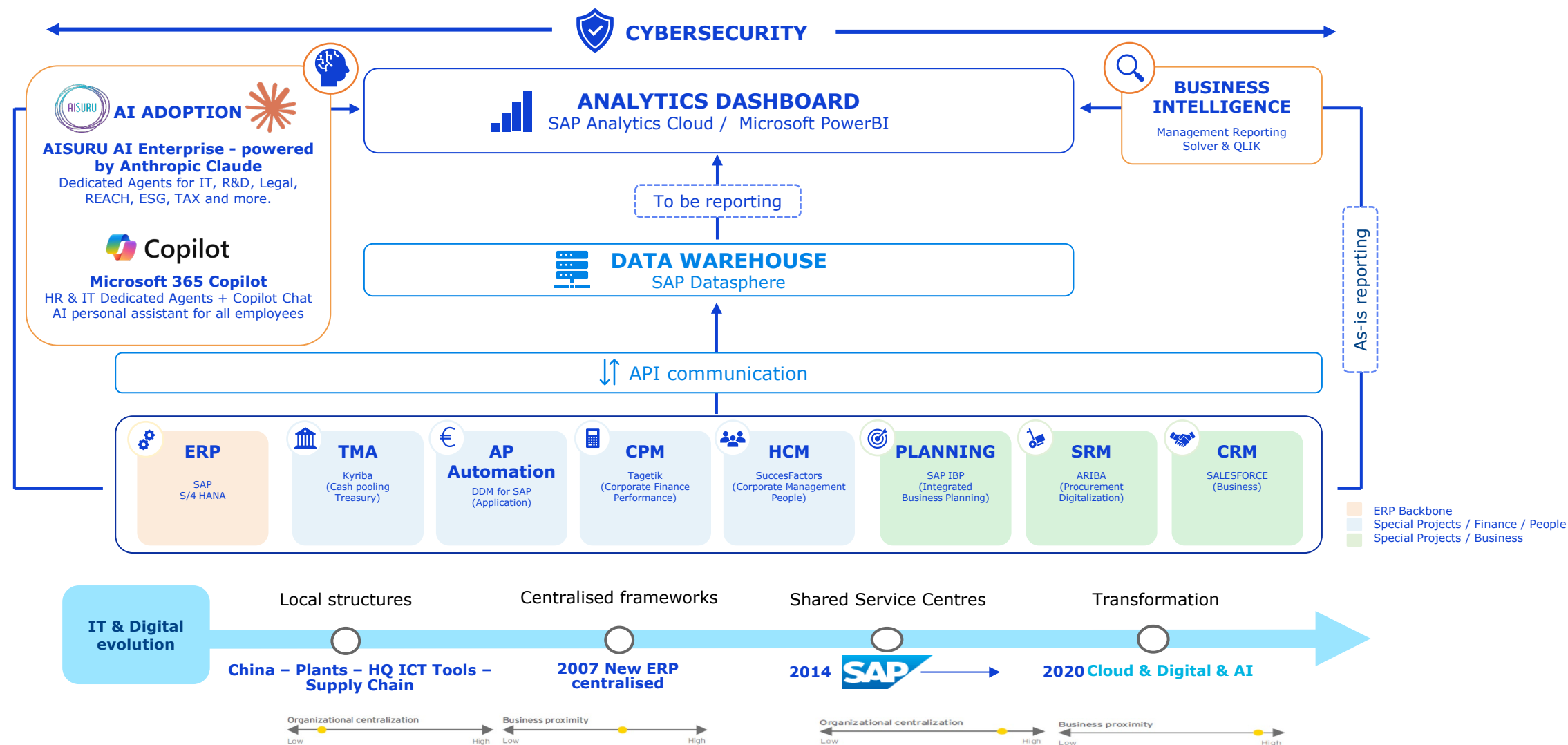


**State-driven
Fast implementation
Massive data**

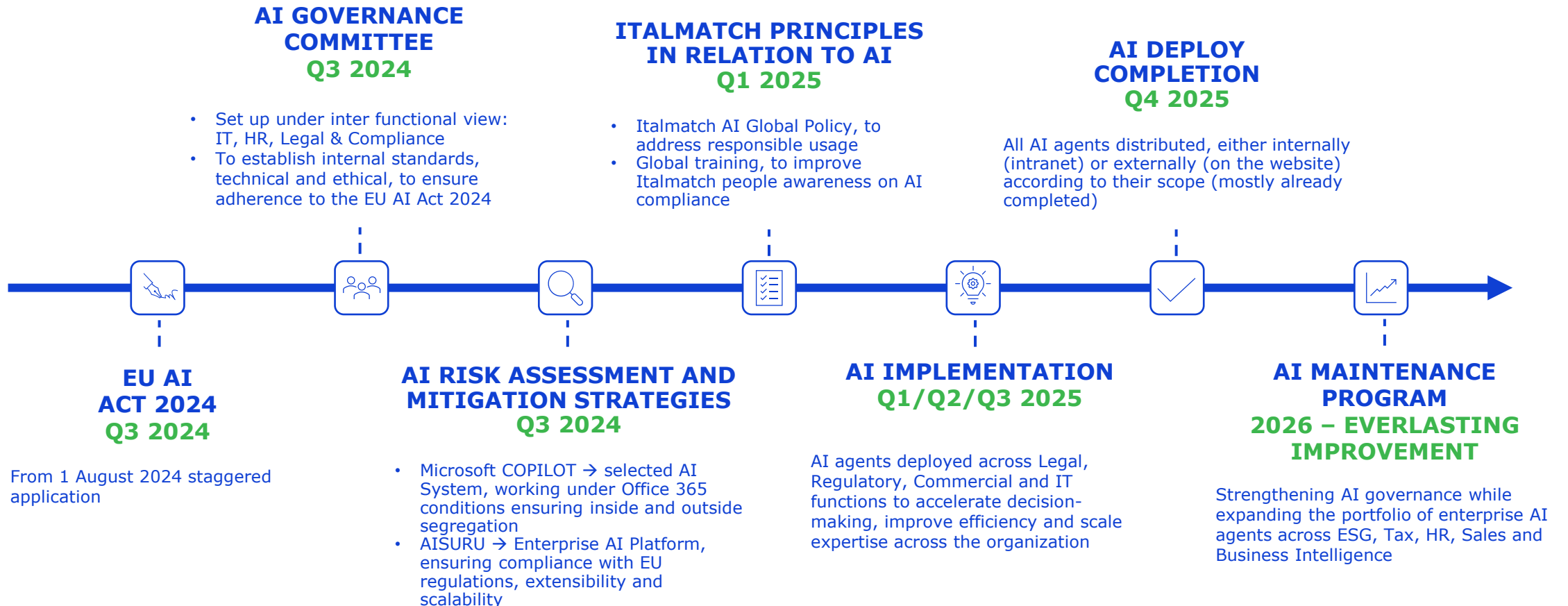
Centralized strategic development under state control. Rejection of Western alarmism; prioritizing technological sovereignty.

W *"The rush to invest in AI is a paradox: companies are feeding the systems that will make them obsolete. AI adoption's rapid pace in the US may cause immediate social collapse. Europe's "slowness" driven by strict regulations creates a positive counterbalance"*
Andrea Pignataro (ION Group CEO & Founder)

Italmatch Digitalization roadmap



Italmatch AI roadmap



Italmatch's AI Agents for smarter collaboration



SupplAI
IT Support



OriginAI
Regulatory Dept.



Aida
IT Support



GaIA
ESG Dept.



Atlas
Freight/Logistics



TaxAI
Tax Dept.



Virgil.IO
Business Dev.



LexAI
Legal Dept.



Nova
Sales dept.



BI Assistant
Finance &
Controlling



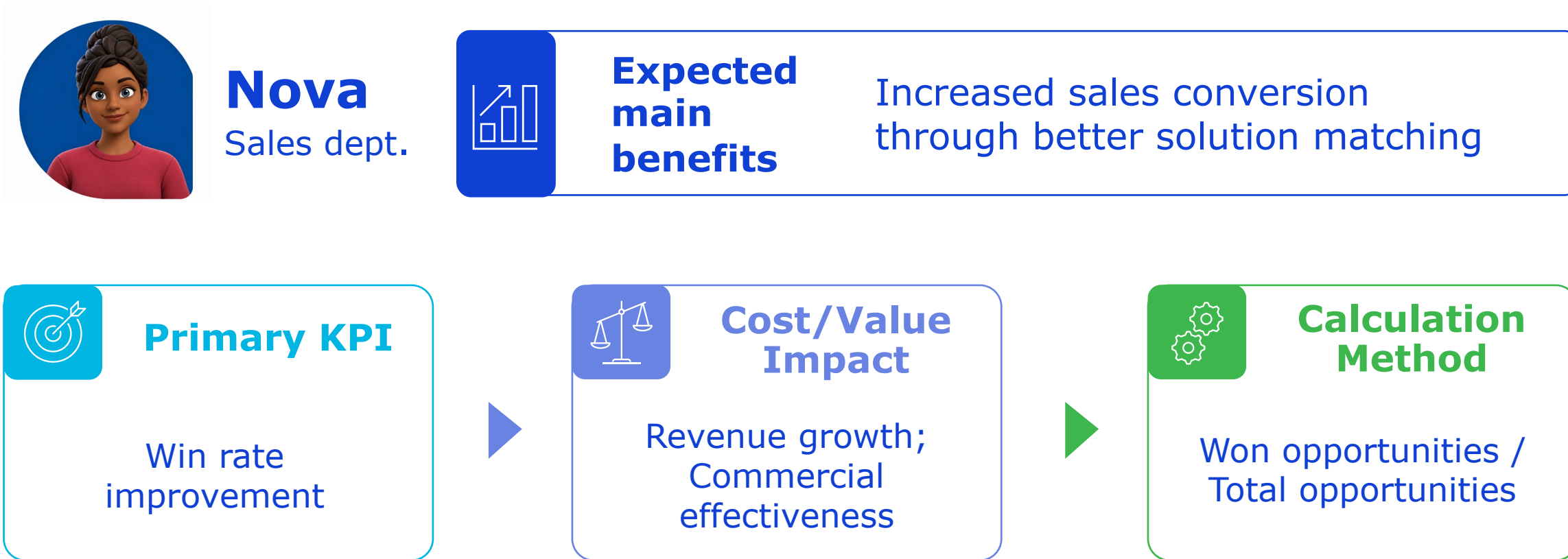
AgentForce
Salesforce

LIVE

ON-GOING

DISCOVERY

AI Agents: value framework and business impact – An example



Case Studies: the impact of OriginAI and Virgil.IO



OriginAI

Faster Regulatory Data Collection



Efficiency / Risk Reduction

Compliance, traceability and audit readiness gain



Know-How Visibility Better Assessment Quality

↑ Workforce Effectiveness



3 hrs saved X 5 FTE based on 80 monthly conversations

Capacity Release



Faster Qualification Lead Time ~6.000 Finished products

↑ Efficiency



Virgil.IO

Business Development - Technical Innovation
Marketing - Well Services



1 hour saved based on 15 monthly conversations

Productivity gain; Service level improvement



Know-How Visibility Better Recommendation Quality

Revenue enablement; Workforce Effectiveness



30% time saved for technical recommendations

Capacity Release

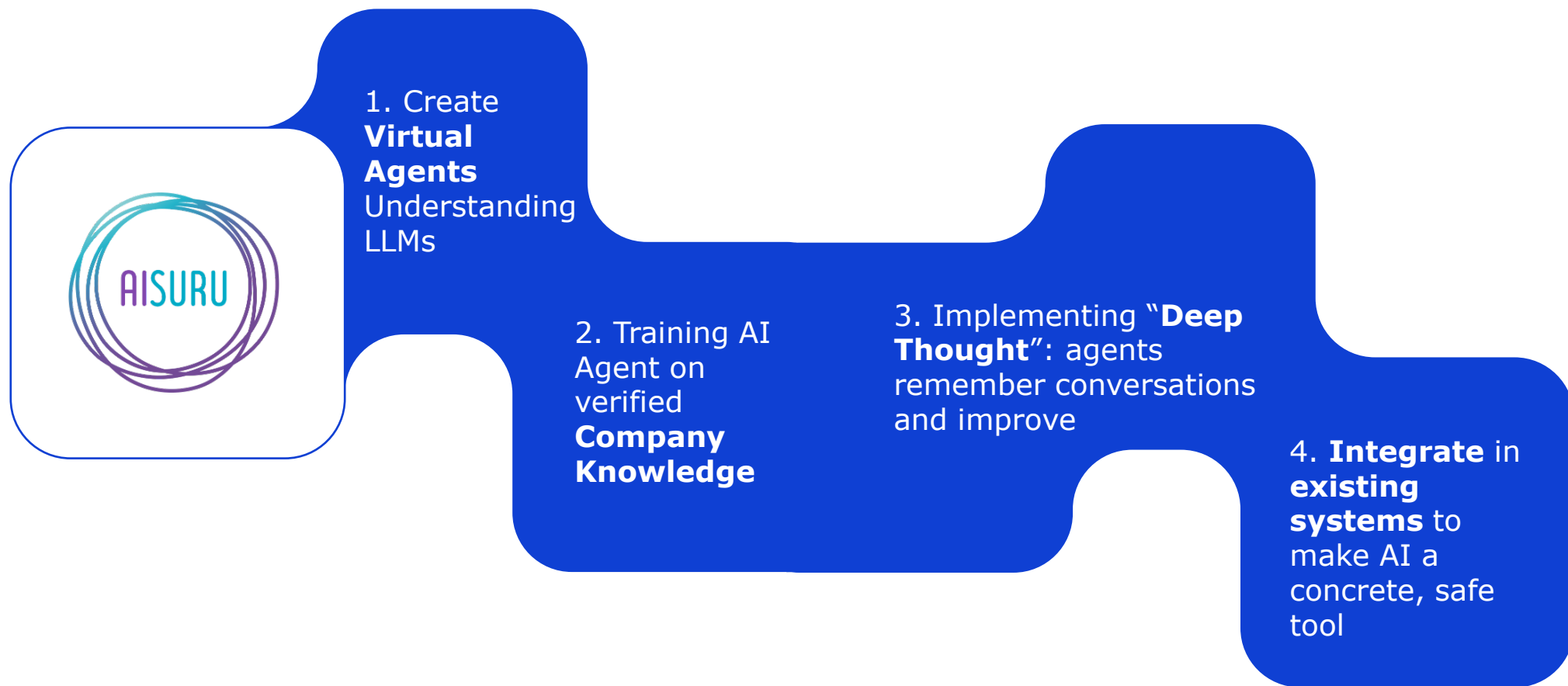


-20% reliance on senior experts

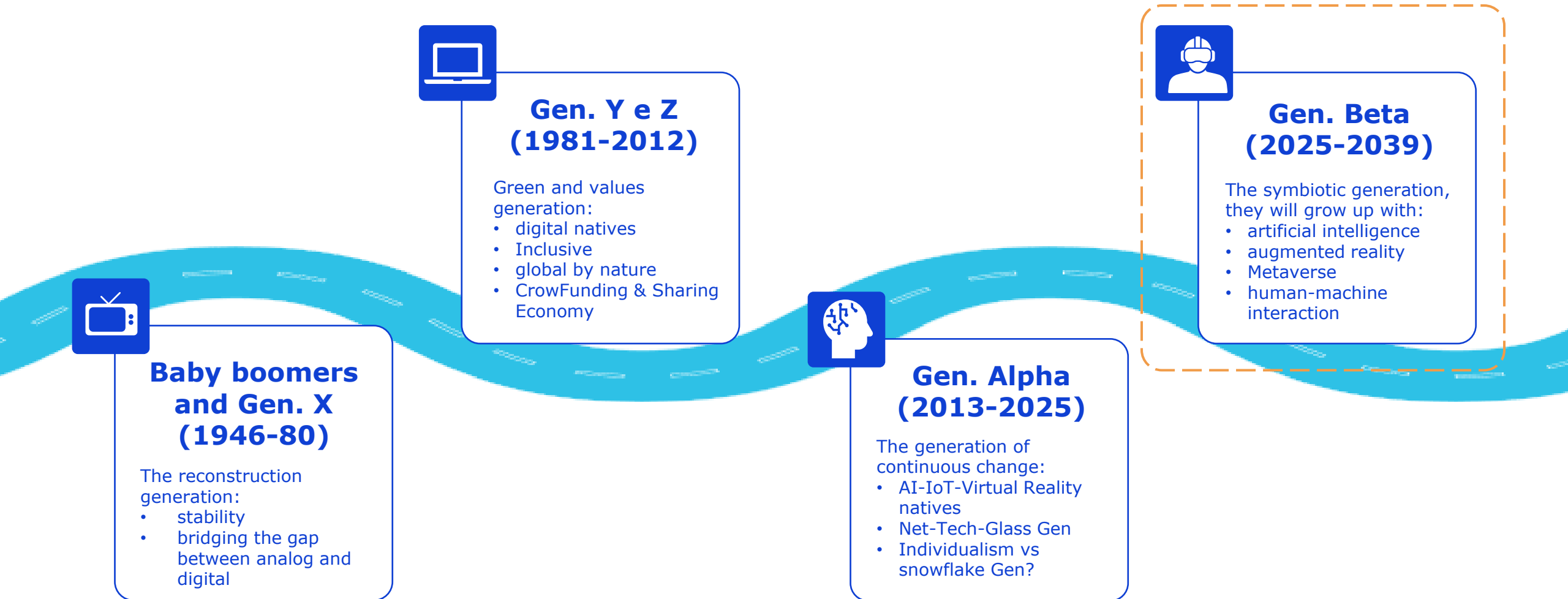
Cost avoidance

Aisuru Platform: AI orchestration approach

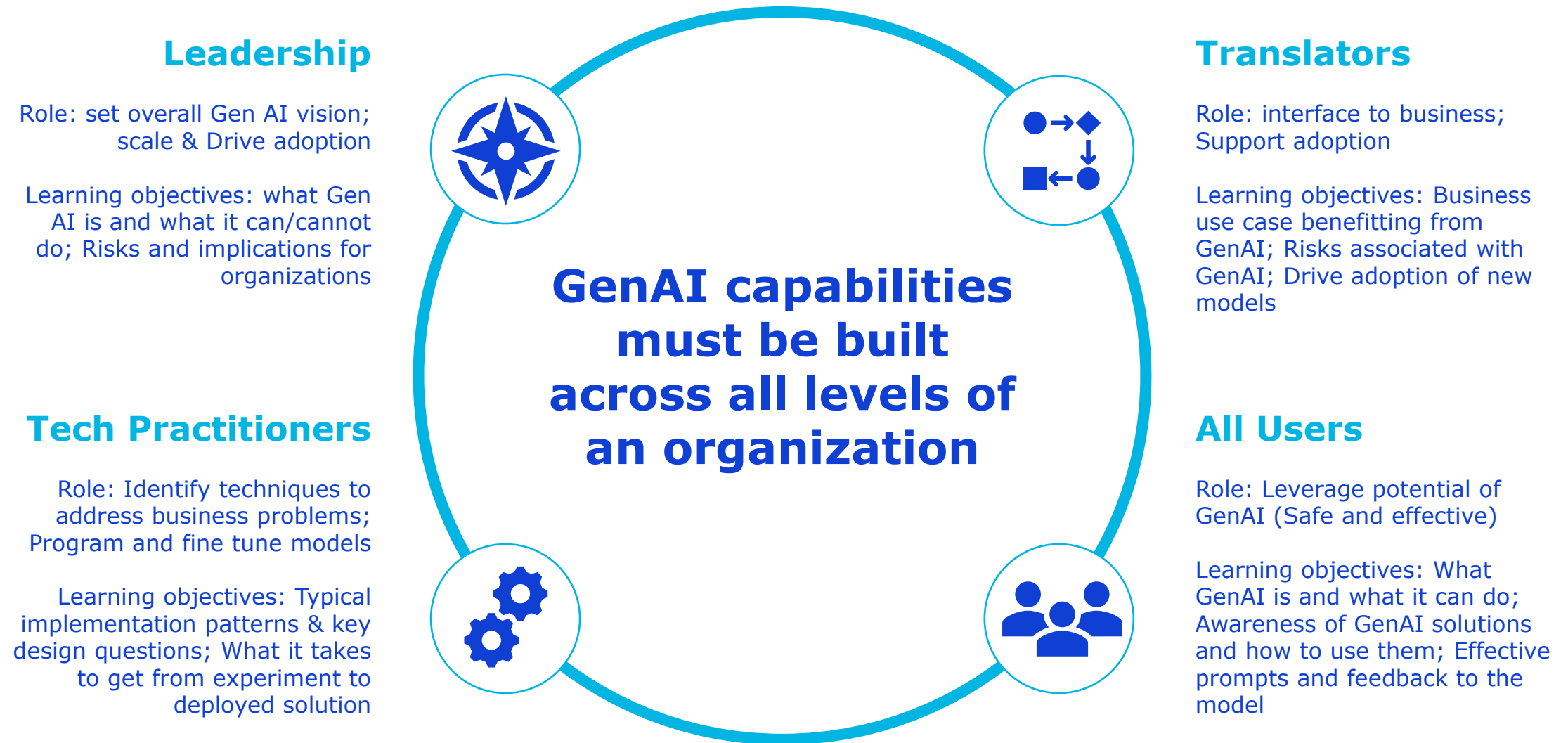
Memori's approach, through the Aisuru platform, provides "**human-in-the-loop**" model, which is essential for building trust and reliability in both end users and organizations, and compliant EU AI Act.



Intergenerational integration as a model – What's next?



Italmatch's human tech: people, technology and new generations



Italmatch's evolution in leadership and skills: education and training

New generations are moving from **hard skills** to **soft** and **meta skills**.



Cognitive leadership



Self-awareness



Building habits



Learning To learn

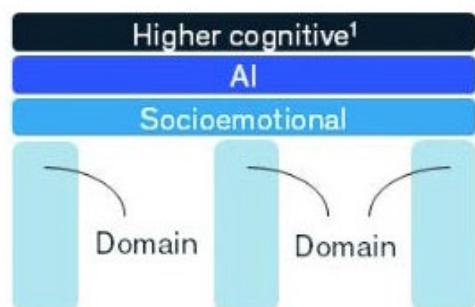


Creativity



Resilience

Reciprocal Mentoring embodies this change: a holistic exchange of knowledge between senior and junior professionals, without predefined roles of teacher or learner.



Multiskilled (M-Shaped) manager profile

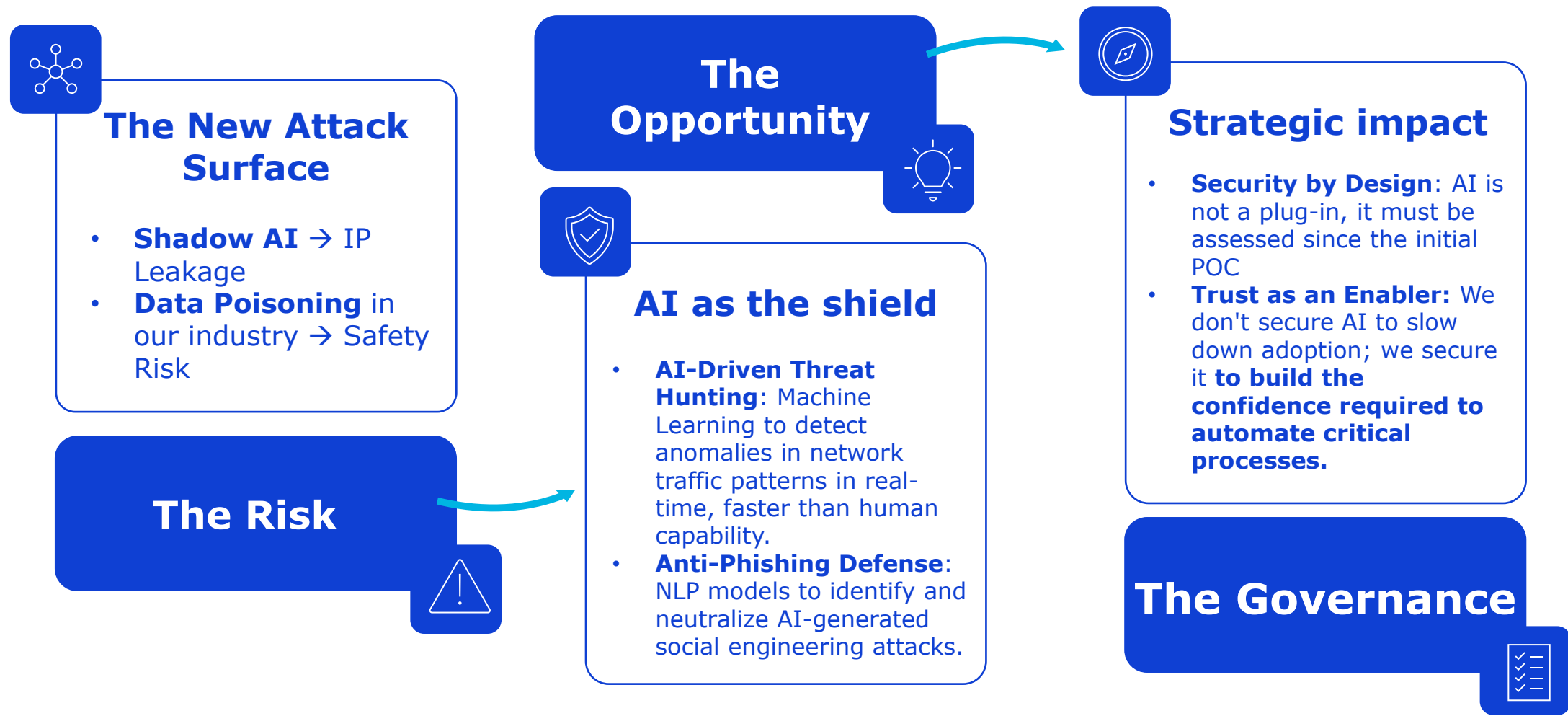
Skills required for the evolving manager in the AI era

Owns domain-specific business outcomes, is AI fluent, and can build agentic workflows leveraging no/low code platforms; acts as a supervisor of multi-agent workflows

1: for example, critical thinking, problem solving, creativity, decision making, abstract thinking



Cyber-Resilience in the Age of AI



From protected access to measurable control

Cybersecurity becomes operational: Control → Trust → Scale

1



KNOWLEDGE

Approved, current documents

2



AGENT CONTROL

Purpose, tools, limits, users

3



TRACEABILITY

Activity, history, interventions

4



VALUE & COST

Tokens, adoption, fit-for-purpose

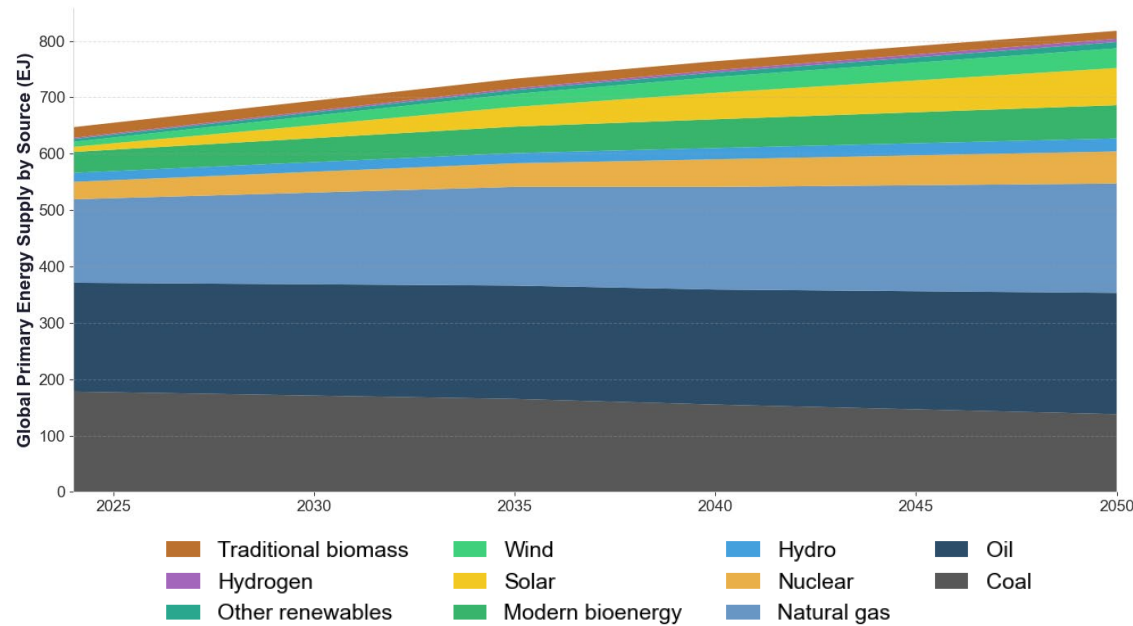


Future scenario – Carbonomics: energy transition or energy addition?

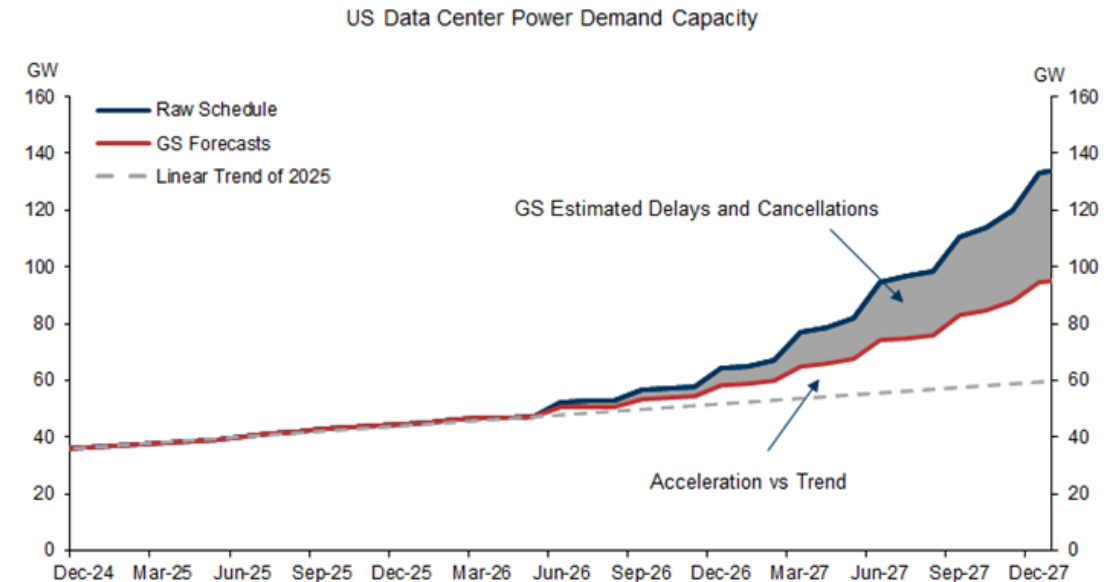
We need more energy for a growing world, as AI adds to a growing energy demand

All energy sources will support the growing energy demand; renewables now account for 13% of the mix – expected at 26% in 2050 (*Global Energy Supply By source, Current Policy Scenario*)

We expect data centers to be the primary driver of US power demand growth, with capacity set to double to 95 GW by end-2027 vs. 2025 (*US Utilities team Data Center Power Demand, GW*)



Sources: IEA, Goldman Sachs Global Investment Research



Sources: Aterio, Goldman Sachs Global Investment Research

Environment, Culture, Equity and Sustainability for a generative and non-subtractive coexistence

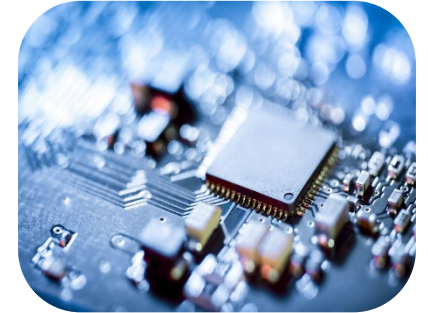


Four Future scenarios?



From stone to **microchips**... And then back to **stone** again?

Is it necessary to leave Plato's Ego cave?





Thank You

follow us on:

Italmatch.com  