



26th August 2024

Customer Communication:

This communication is intended for Sasol's customers to assist them in planning their polymer supply positions through the indicated period.

Southern African Supply Status: C2 Value Chain – PVC Supply September - December 2024

Dear Customer,

This communication serves to inform all our customers as to the updated outlook on PVC supply through Q4 2024 as circumstances have changed with respect to the impact of the statutory maintenance shutdown on the VCM/PVC units.

As previously indicated in our customer communication of 11th July 2024, the PVC plant was expected to undertake a 21-day maintenance shutdown commencing 28th August. We have recently been notified that there has been broadening of scope of the required shutdown activities and as such the plant outage will now extend through to the end of September.

Given this change, our previously advised level of expected stock cover has been impacted and it has become necessary to implement market allocations over the period of October and November 2024. For September, the forecasted volume requirements remain intact although customers may be requested to interchange grade pack sizes where necessary.

For October and November, your sales account manager will be in contact with you to provide further detail as to the volume availability over this period. Please note that execution of all October orders will remain subject to the safe start-up and stable operations of the PVC unit and hence delays in delivery are to be expected in the month. The majority of volume will be available for delivery in the latter half of the month, and some interchange flexibility between pack sizes may be offered. From December onwards, we expect inventory cover to be fully replenished. Hence at this time there remains no requirement for allocations to be extended beyond November taking into account the prevailing market demand profile.

Sasol trusts that this information provides the appropriate guidance to assist you in terms of planning your PVC supply positions through the remainder of 2024. Please discuss with your Sasol Chemicals Account Manager should you require any further clarification or assistance.

All demand forecasts and where applicable planned allocations are subject to actual production taking place as planned and apply only to the month in question. No rolling of untaken allocation volumes into future months, or bringing allocation volumes forward can be allowed from month to month should Sasol not be able to execute on these.

Customers are reminded that supply forecasts and allocations, like customer demand forecasts, are planning tools used to provide some guidance to both Sasol and its customers. However, the actual 'contract of sale' as per the General Terms and Conditions of Sale ("GTOS") as signed by

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both parties arises once Sasol has confirmed delivery against accepted orders placed by customers.

Thank you for your understanding and cooperation.

Yours sincerely,

Gerome Marrian
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Brian Sole
Senior Marketing Manager Polymers
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