



WHERE SCIENCE SERVES NATURE

# VALAGRO AND THE GROWTH OUTLOOKS IN THE INDIAN MARKET

# What does «Indian market» means?

Agriculture plays a vital role in India's economy

**2nd** – ranking of India for the arable land (160 Mill ha)

**45%** - workforce is engaged in agriculture

**17%** - contribution of the agriculture to the country's GDP

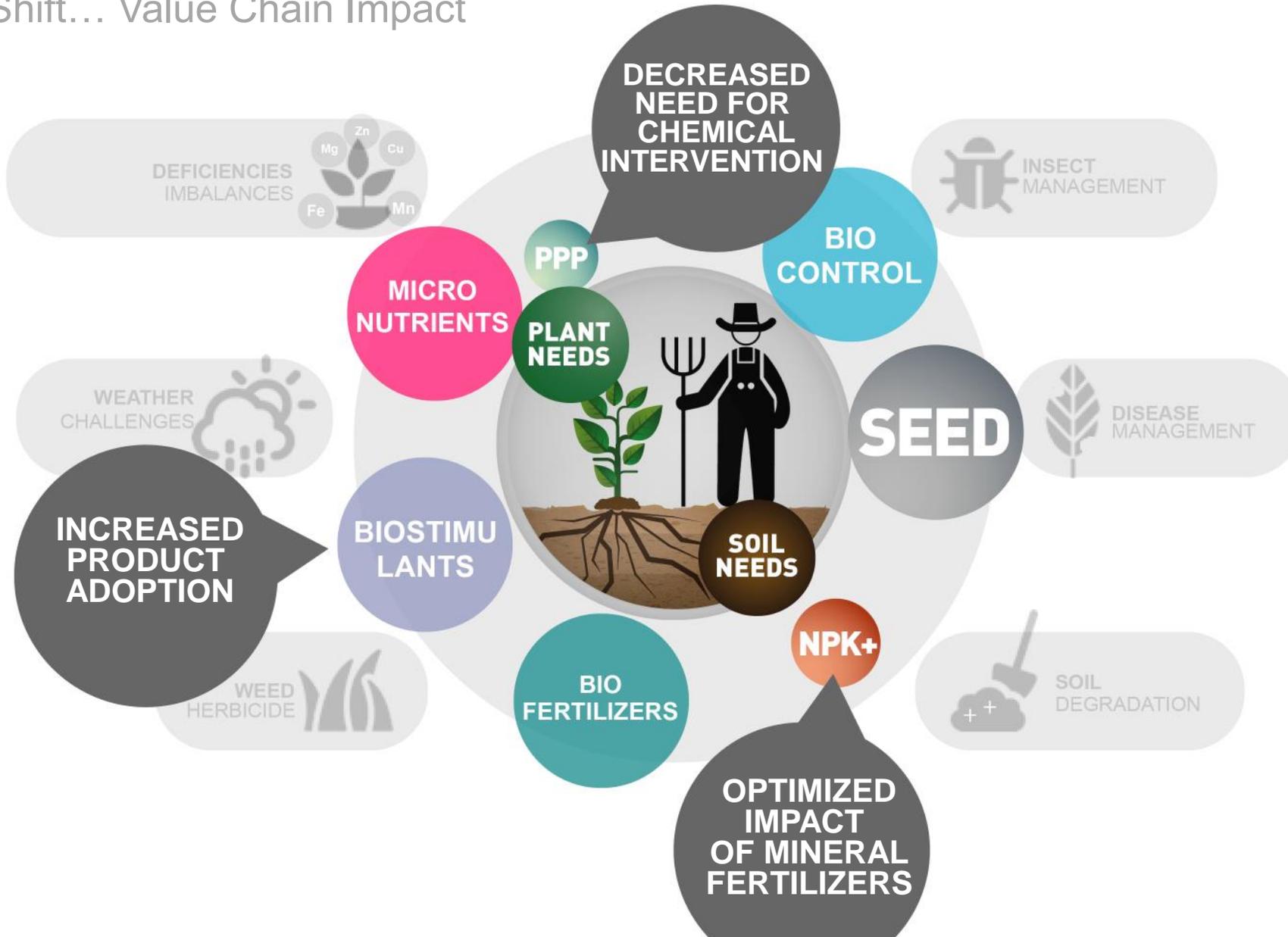
**70%** - percentage of growers own less than 1 ha

**45%** - access to irrigation

**3.4%** - the real income of farmers has grown at this rate between 1993 and 2016

# What Indian market means?

Today's Shift... Value Chain Impact

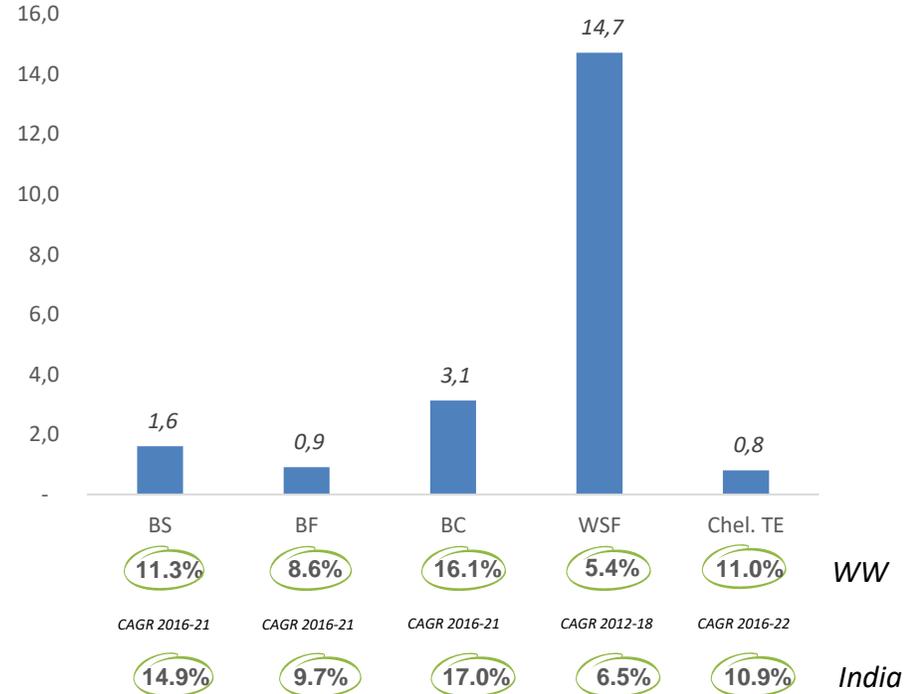
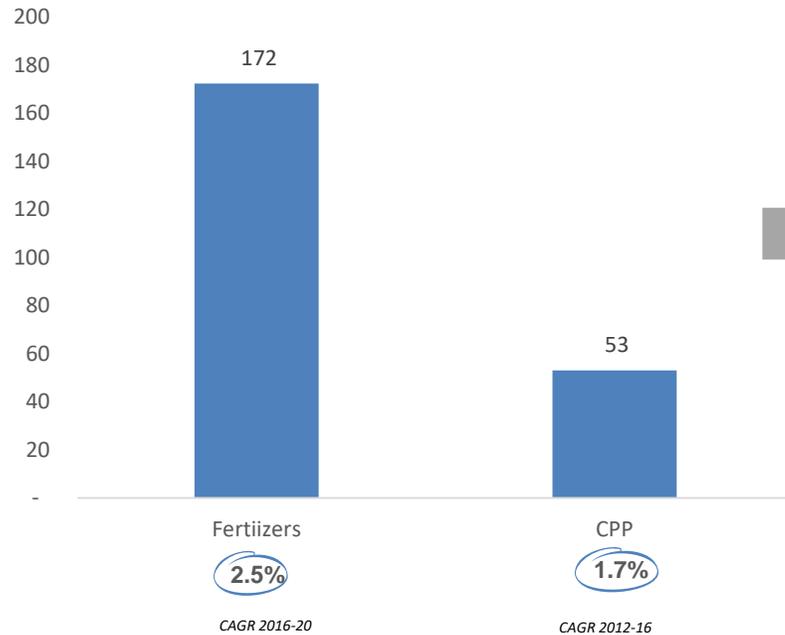


# What Indian market means?

CPP, Fertilizers vs Biostimulants, Chelated Trace Elements, WSF, Biofertilizers & Biocontrol

**\$233 B. Global Agricultural Input Market  
CPP+Fertilizers**

**Target Market Sales of \$21.2 B.**



Source: Kieffmann 2018 (CPP), IFA Annual Conference Medium-Term fertilizer Outlook 2016-2020 (Fertilizers), IFA Country profile may 2017 (Fertilizers), Global Biostimulants Market 2016-2021. Market Data Forecast 2017 (BS)  
 Internal elaboration from Global Market Insights 2018 (BF), Global Biopesticides Market 2015-2021. Market Data Forecast 2017 (BC), Global water soluble fertilizers market trend&forecast to 2018. Markets&Markets 2014 (WSF)  
 Global Micronutrients fertilizers market 2017-2022. Mordor Intelligence 2017 (TE)  
 CPP Crop Protection Products; BS (Biostimulants), BF (Biofertilizers), WSF (Water Soluble Fertilizers), Chel. TE (Chelated Trace Elements)

# How Valagro shapes its business model to fit with the Indian Market needs

Coherence matters

...**creating innovative and effective solutions** for plant nutrition and care, while respecting people and the environment (**Valagro Mission**)

...**using less resources**, thanks to a new Con-science, able to put Science at the service of man through innovation and respect for Nature (**Valagro Vision**)



# How Valagro shapes its business model to fit with the Indian Market

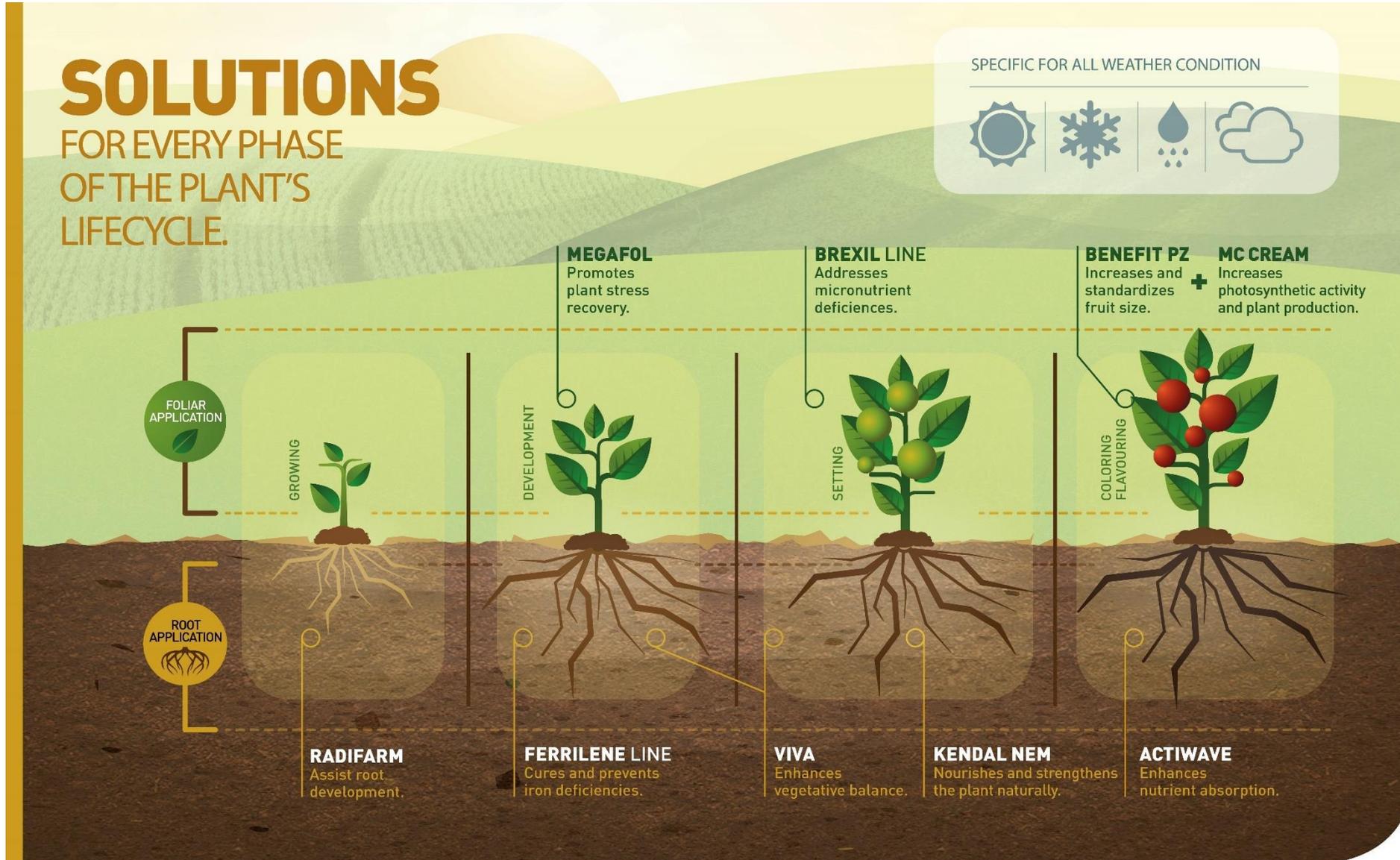
Our Business Model



We continue to invest in and develop our business model through technologies and services that provides a closed-loop between customer needs and product development.

# New Products for the Indian Market

## Our Solutions



# New Products for the Indian Market

New Products 2018



## YIELDON

HIGHEST CROP  
PRODUCTIVITY,  
HIGHEST RETURN  
FOR FARMERS



## OPIFOL

A NEW LANDMARK  
FOR ROW CROPS  
NUTRITION

## COOMING SOON



## BIOSTIMULANTS

### DEVELIT

#### DEVELIT HI

(GEA820)

### HEIKO

#### HEIKO *root*

#### HEIKO *seed*

## BIOFERTILIZERS

### HYORO

#### HYORO *MY+*

#### HYORO *P<sup>+</sup>LUS*

#### HYORO *P<sup>+</sup>LUS*

# New Products for the Indian Market

ROBUST PIPELINE FUELING GROWTH

2019

## GEA 820 – Soil energizer

- Unique association of microbes and soil biostimulant
- Optimize the use of natural plant nutrition

## GEA 947 – Water Use Efficiency

- Unique biostimulant mix allowing to optimize irrigation
- Allow commercial yield with less water

## GEA 1041 – Seed treatment line up:

- Complete line for seed treatment based on specific microorganisms tailor made for different crop needs
- It improves the seeds quality (% emergence and starter effect)

## GEA 1141 – PBS based on biologicals:

- Created for soil application through drip irrigation systems
- A complete biostimulant to support specific needs during all crop cycle

## GEA 1142 – Micro-granular starter :

- Based on unique biological matrix with specific mineral compound.
- Real biostimulant effect for arable crops and open field vegetables

2023

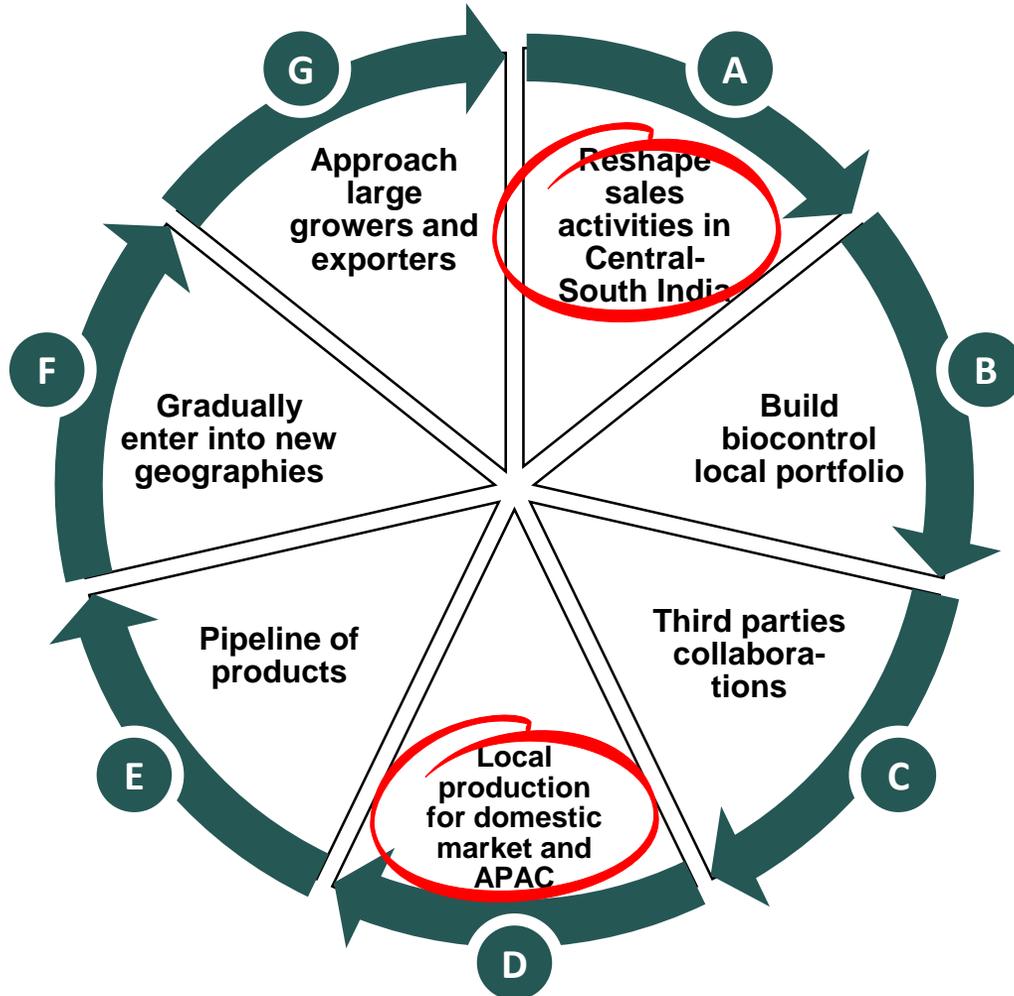
FURTHER ON  
GOING DEVELOPMENT

Among the others, the main target explored are:

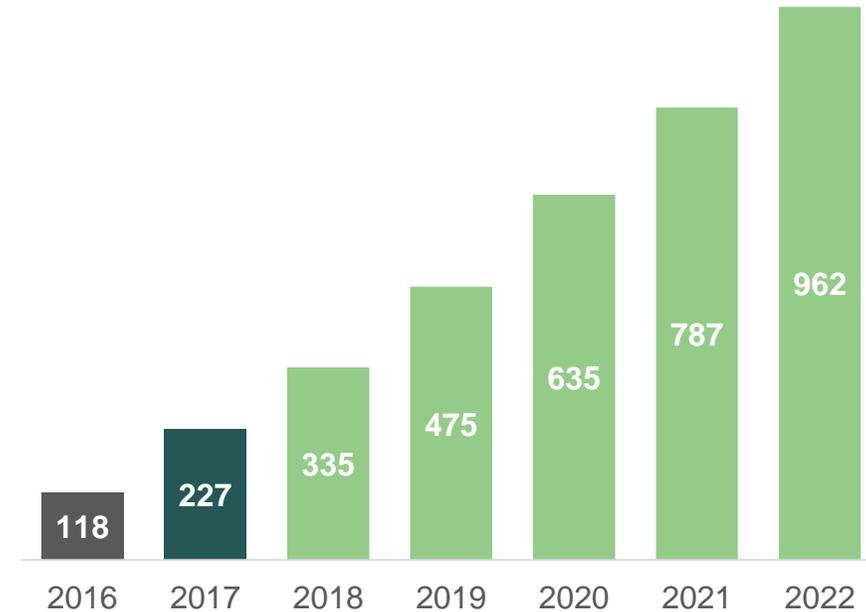
- *Disruptive biostimulant technology*
- *Nutrient Use Efficiency*
- *Crops quality*
- *Models and kits to support crop/product management*

# Growth initiatives to reach 2022 targets

Business Plan and Mid Term Plan



## Projected Sales (Mill INR)



# Growth initiatives to reach 2022 targets

Passion and commitment to serve the Indian Farmers



# Growth initiatives to reach 2022 targets

Passion and commitment to serve the Indian Farmers

as the adage goes in Hindi we have to serve the Indian Farmers

– **tann / mann / dhann se with our body, soul, spirit**

# THANK YOU FOR YOUR ATTENTION

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WIN THE  
GLOBAL  
CHALLENGE  
TOGETHER



*Where science serves nature*