



VALAGRO FOR FUTURE FARMING: WHAT'S NEXT

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CEO, Valagro

change.
challenge.
opportunity.

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FOOD: THE BIG ISSUE



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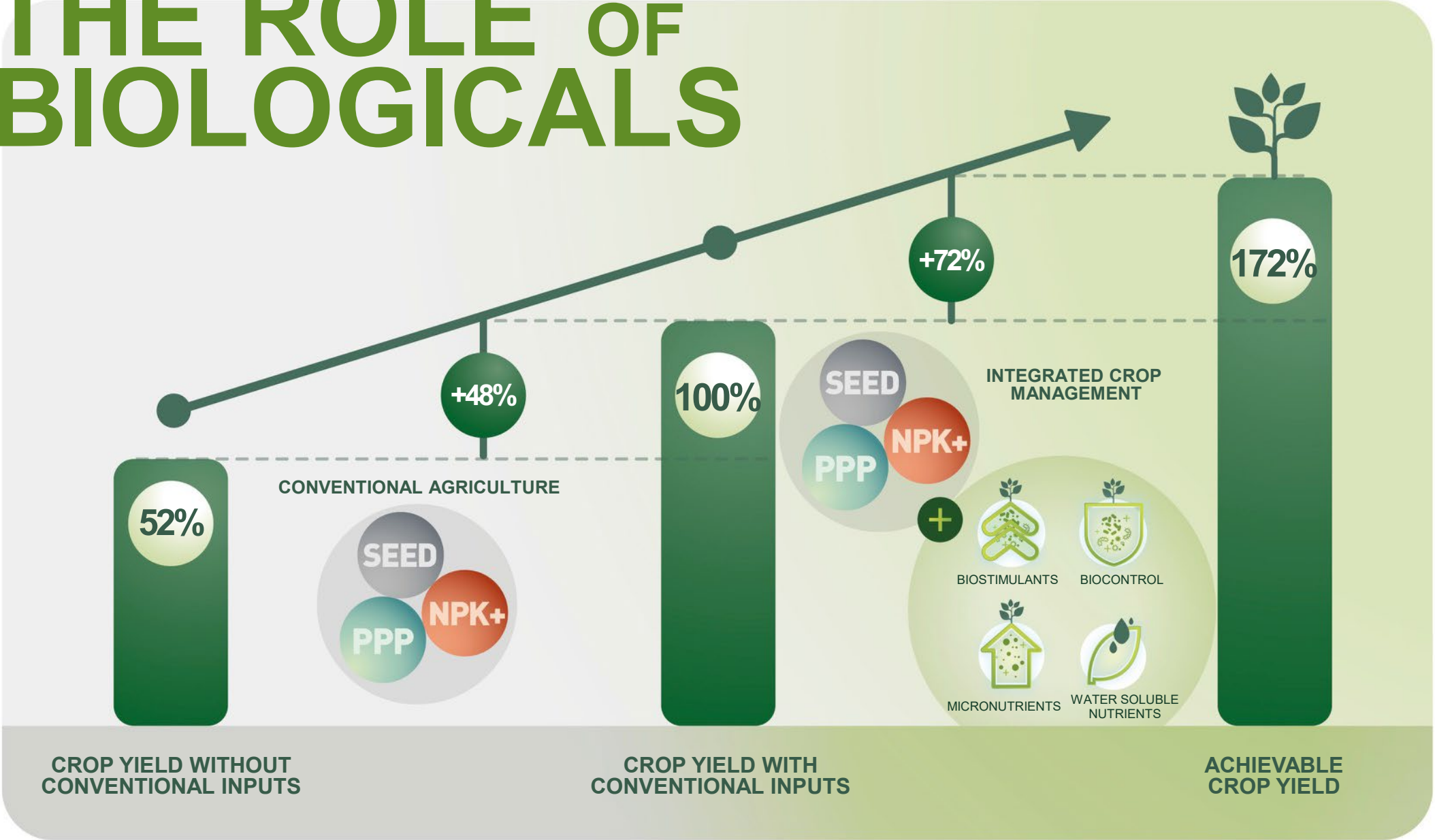
FOOD: THE BIG ISSUE



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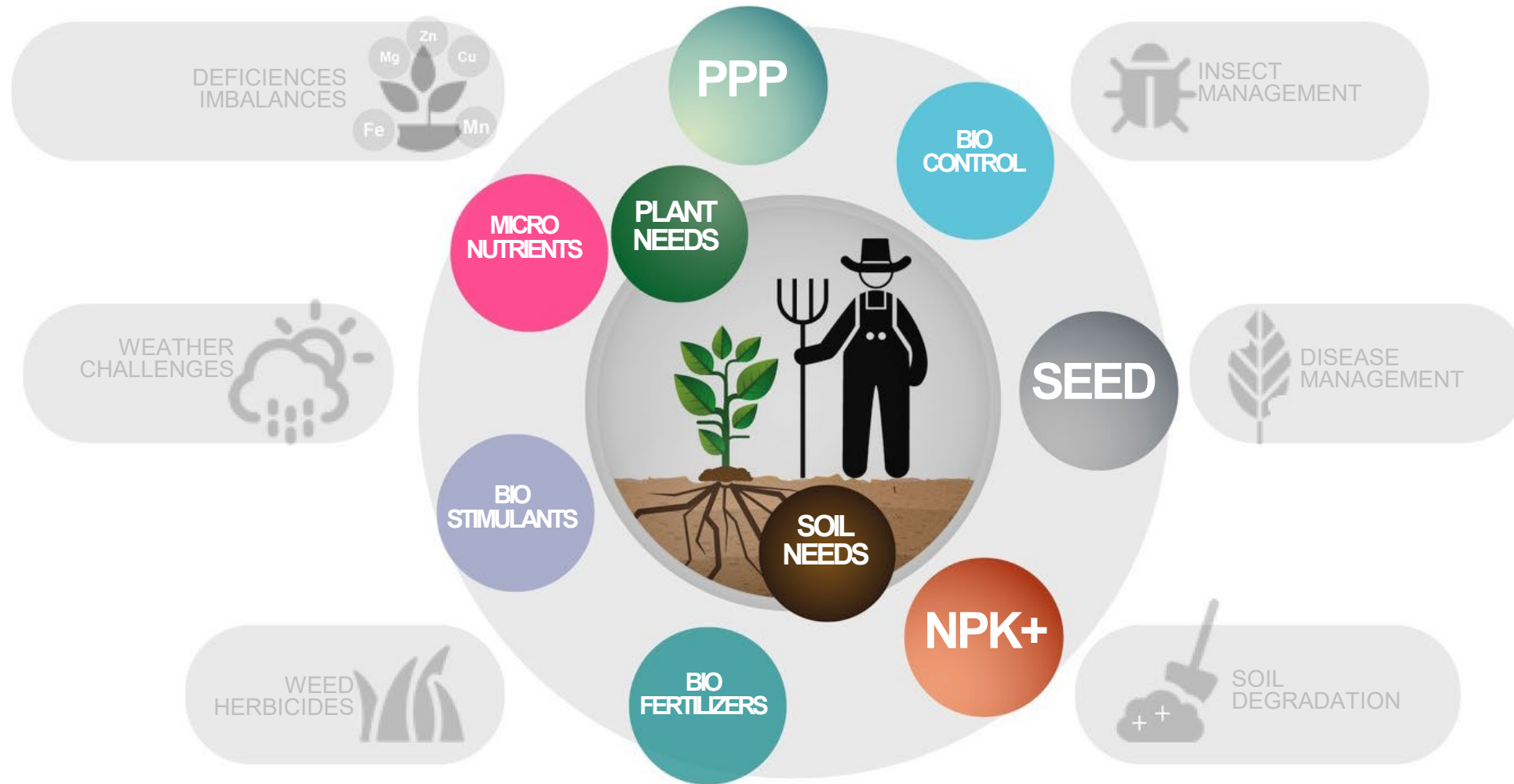
CLEAR LIMITATIONS

THE ROLE OF BIOLOGICALS

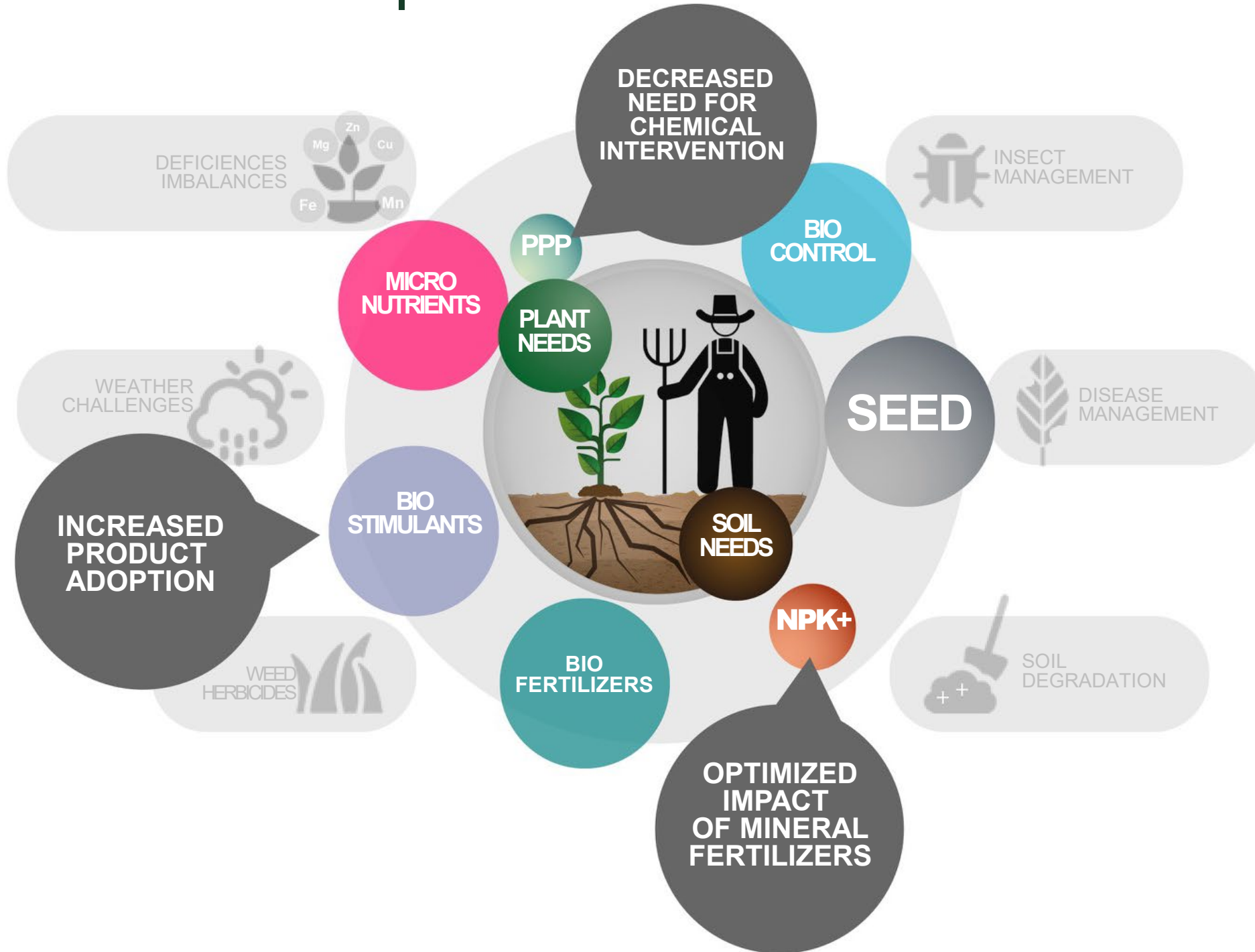


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TODAY SHIFT



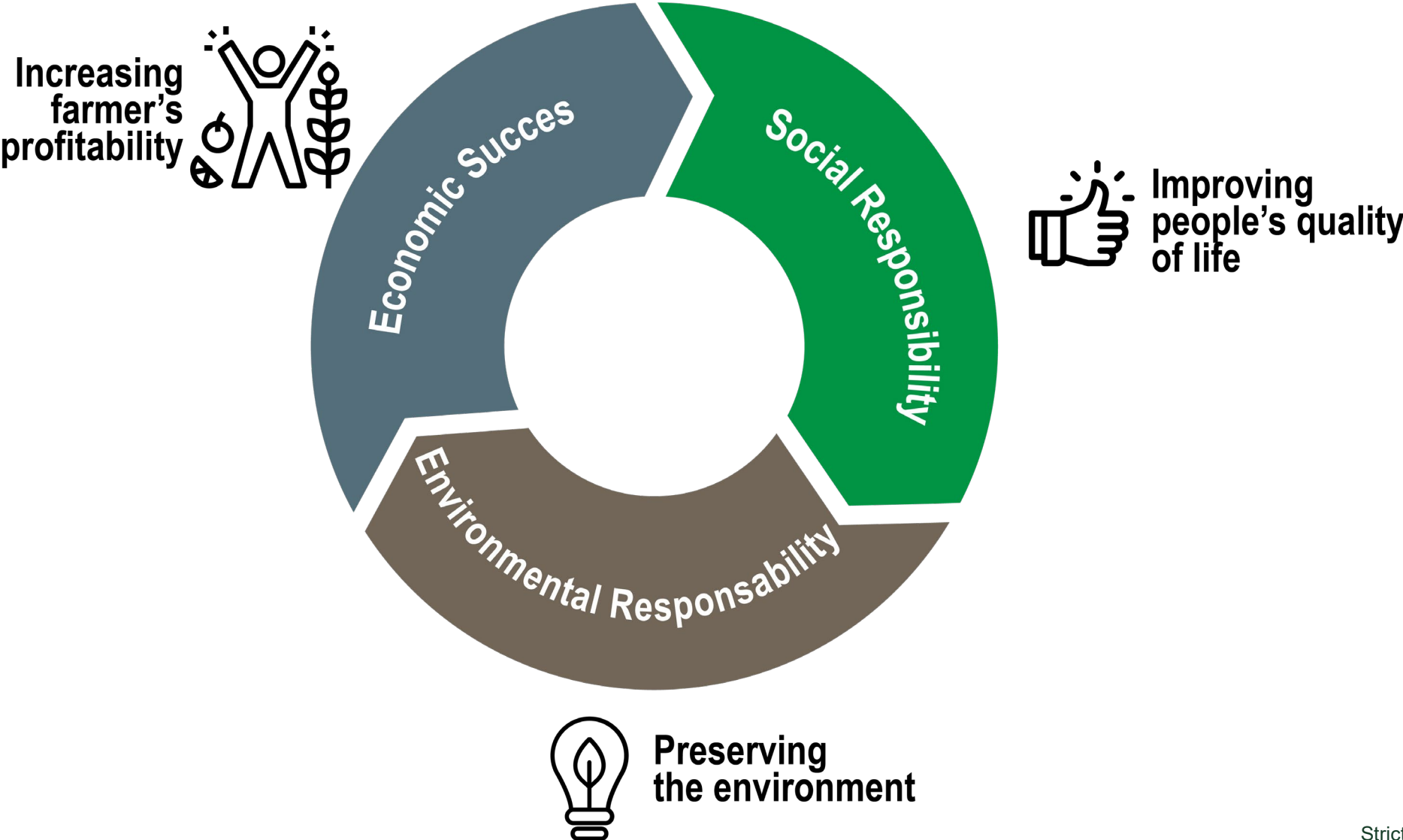
TODAY SHIFT | VALUE CHAIN IMPACT



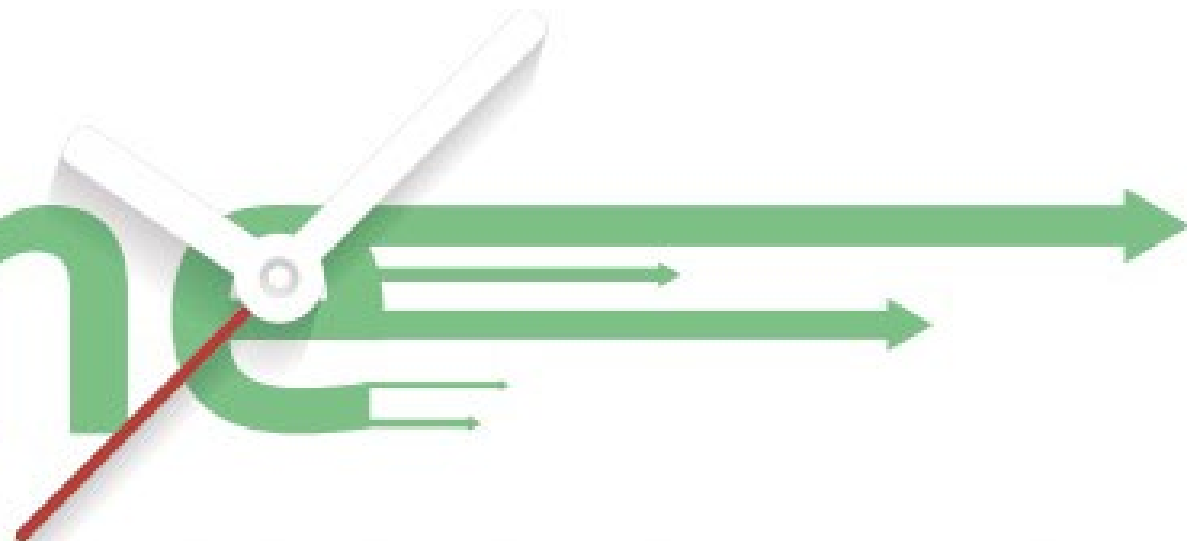
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NEED FOR A HOLISTIC VIEW ON SUSTAINABILITY

DIGITALIZATION WILL DRIVE
SUSTAINABLE AGRICULTURE.



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time

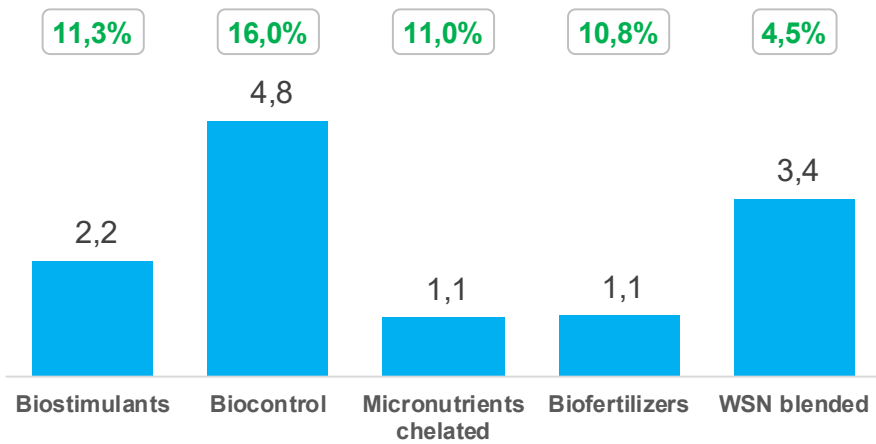
TO THINK DIFFERENTLY
and move quickly

TARGET MARKET | INDUSTRY DESCRIPTION AND OUTLOOK

Industry and Outlook

Biostimulants market includes humic and fulvic acids, seaweed extracts, Proteins, amino-acids and microbials. **Biocontrol market** includes biochemicals, Microbials, Macro-organisms, Plant derived pesticides. **Micronutrients chelated** market estimation includes EDTA, DTPA, EDDHA, etc., and accounts about 20% of total micronutrients used in agriculture. **Biofertilizers** includes Nitrogen-fixing, Phosphate-solubilizing Potash mobilizing. **WSN blended market** includes the Water Soluble Fertilizers blended to provide Nitrogen, Phosphorous and Potash (NOT included straight fertilizers).

2019 Forecast value in Billions USD @ Manufacturer level
In % the estimated Growth rate until 2021



Source: Plant Biostimulants market size and trend from Global Biostimulants Market (2016-2021) by Market Data Forecast 2017. Biocontrol market size and trend from Global Biopesticides Market (2016-2021) by Market Data Forecast 2017. Chelated micronutrients market size and trend from Global Micronutrient Fertilizers Market (2017-2022) by Mordor intelligence 2017. Biofertilizers market trend and size by internal elaboration from Global Biofertilizers Market Report, 2021 by Global Market Insights 2018. WSN blended market size and trend by Global Water Soluble Fertilizers Market Industry(2016-2022) by Market Litmus 2018.

Focus on Plant Biostimulants

Biostimulants 2019 market split % by Crop

57% of total PBS market value are generated on Row Crops.

68% of WW Harvested Area are dedicated to Row Crops (FAO data 2016).



Source: Plant Biostimulants market split % by Crop and Country by internal elaboration from Global Biostimulants Market (2016-2021) by Market Data Forecast 2017. Internal elaboration of FAO data 2016.

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FUTURE WORLD AGRICULTURE



**TECHNOLOGY
CHANGES LIVES**

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 **Valagro®**
Where science serves nature

TECHNOLOGY-DRIVEN PLATFORMS

DRIVING MARKET DISRUPTION

UBER | World's largest taxi company owns no taxis



| Largest accommodation provider owns no real estate



| Largest phone companies own no telco infra



| World's most valuable retailer has no inventory



| Most popular media owner creates no content

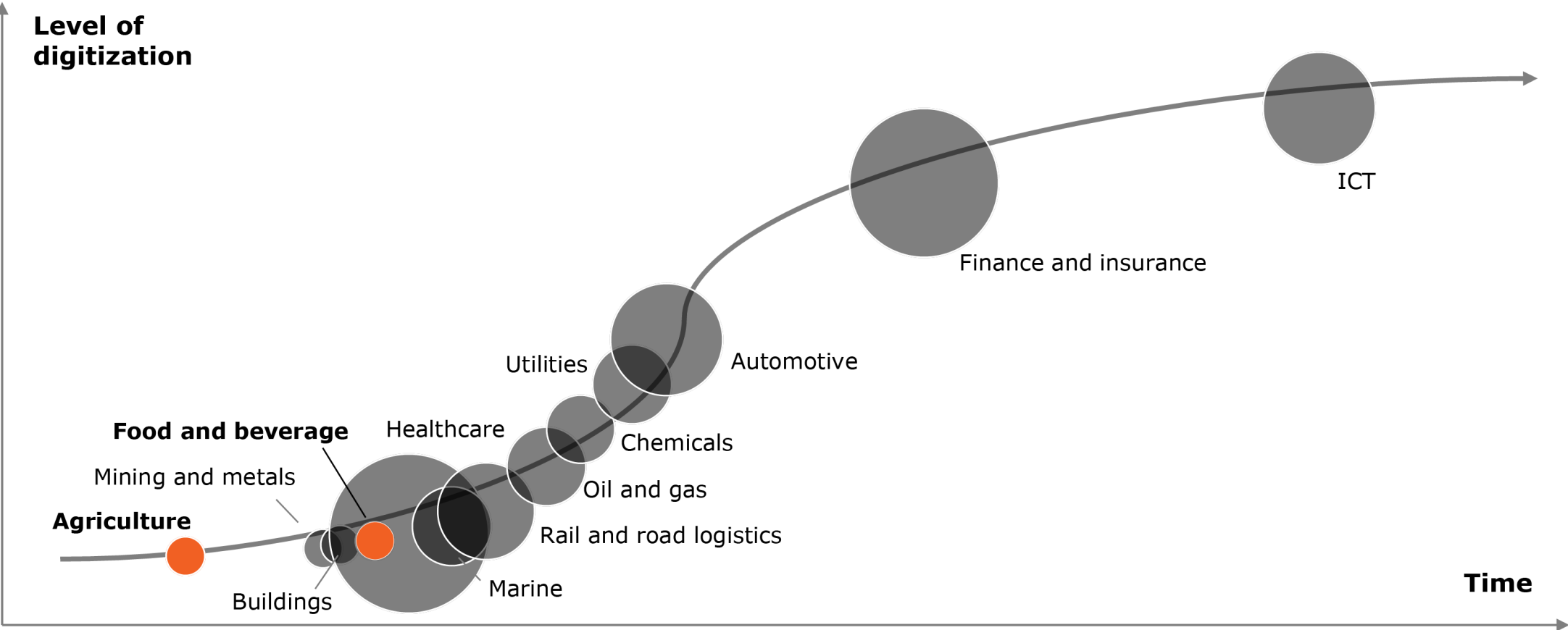


| Fastest growing banks have no actual money



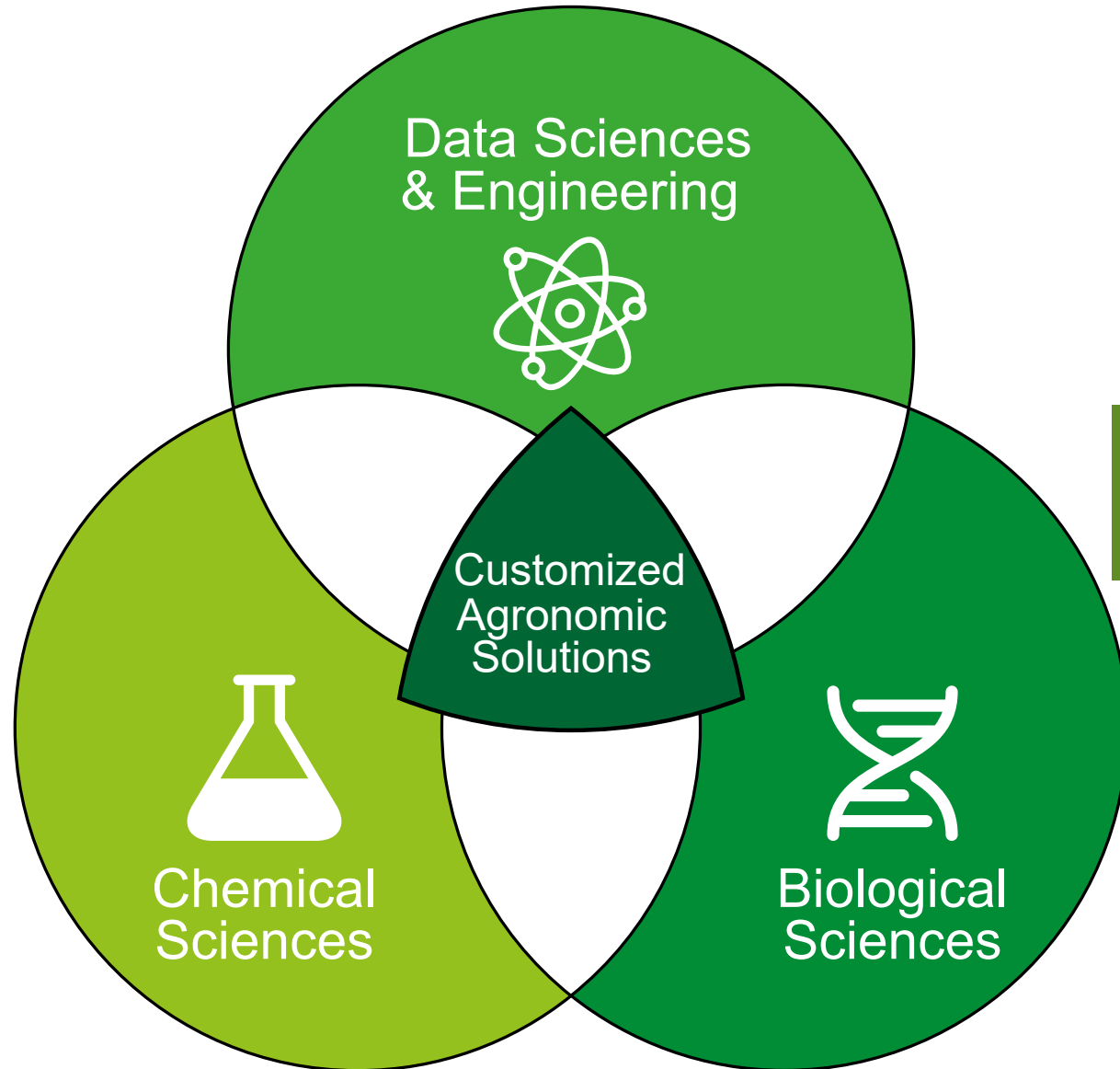
| World's largest movie house owns no cinemas

OUR SECTOR IS A LATE MOVER



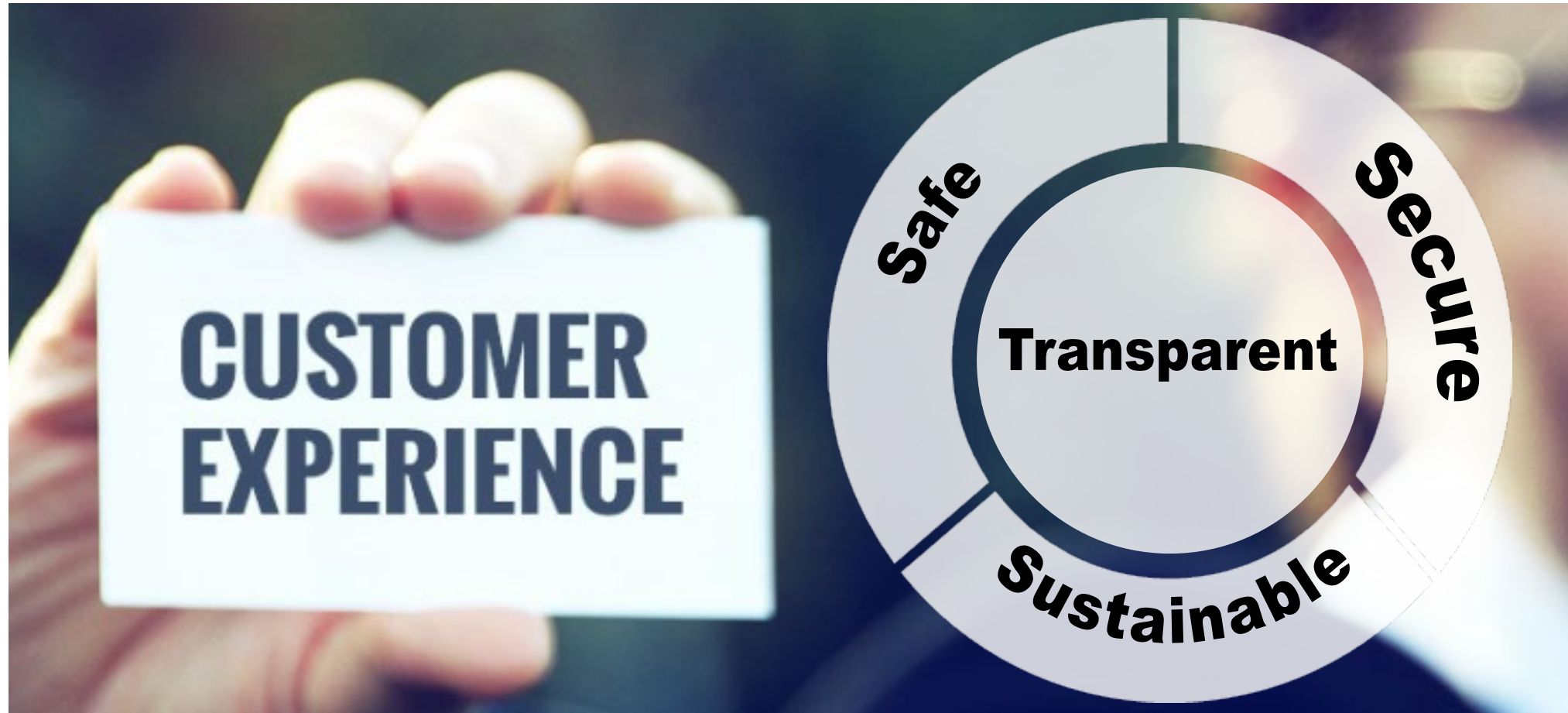
Source: ABB (Note: Bubble represents relative size of the industry for developed markets)

INNOVATION IS KEY TO SOLVING BIG CHALLENGES



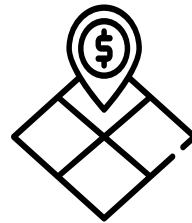
NEW BUSINESS MODELS
POSSIBLE

NEXT GENERATION OF CUSTOMERS

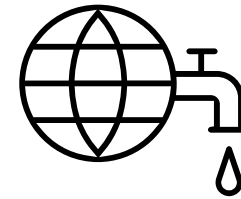


FOCUS CHINA | WHAT'S NEXT?

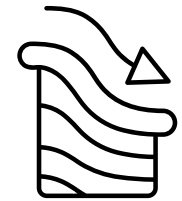
SUSTAINABILITY



IMPROVE
LAND USE
EFFICIENCY



IMPROVE
IRRIGATION
WATER USE
EFFICIENCY



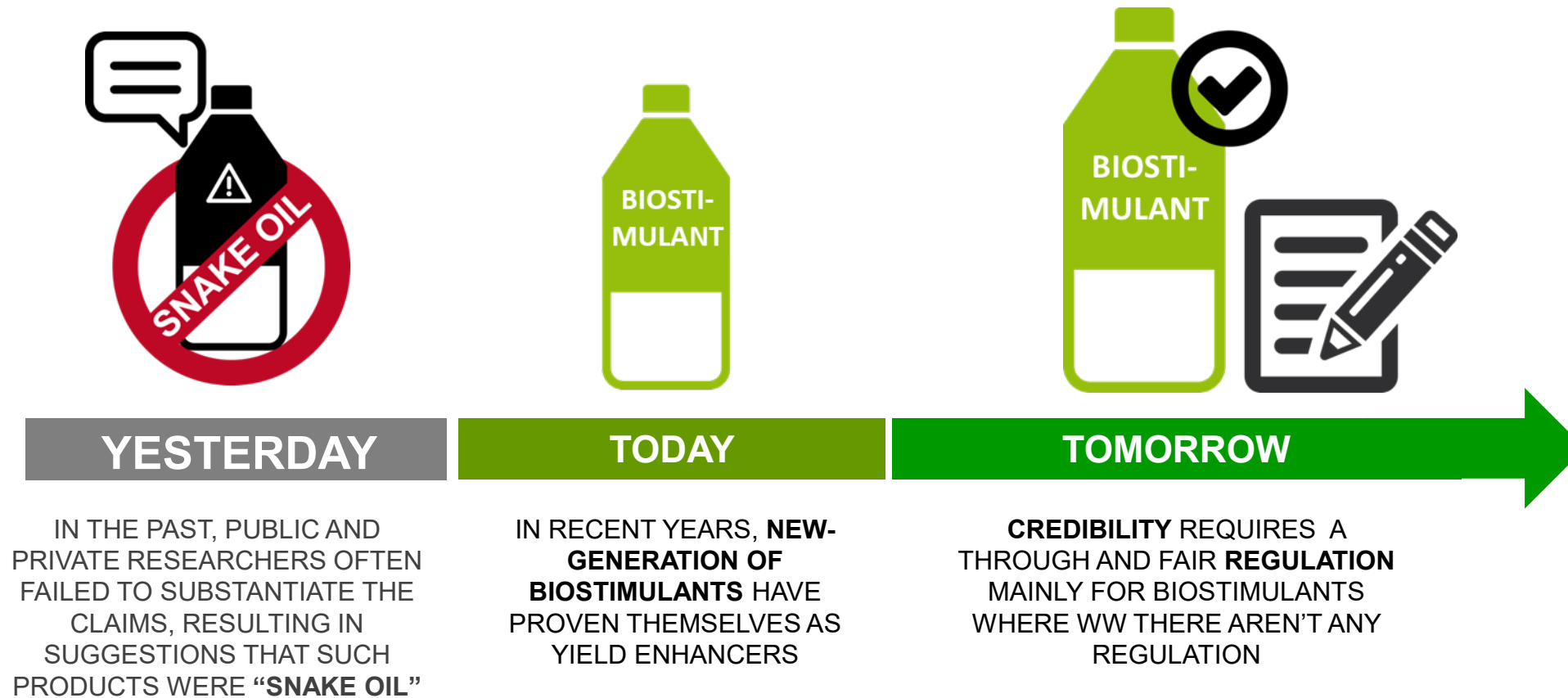
PRESERVE
SOIL
FERTILITY

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 **Valagro**[®]
Where science serves nature

FOCUS CHINA | WHAT'S NEXT?

CREDIBILITY



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INNOVATION



GEAPOW

GEAPOW REDUCES THE COST
OF TAKING A SOLUTION TO
MARKET WHILE ENSURING
CONSISTENT EFFICACY

1



DEEP KNOWLEDGE OF ACTIVE INGREDIENTS AND RAW MATERIALS

- This enables Valagro to identify, characterize and preserve specific active ingredients that can achieve targeted physiological responses in plants



2



PROPRIETARY EXTRACTION PROCESSES

- Customized extraction processes help maintain the correct ratio of each ingredient in complex natural mixtures



3



ADVANCED SCREENING AND INVESTIGATION TECHNOLOGIES

- Genomics, phenomics and other “omic” sciences allow Valagro to decipher the genetic and molecular triggers for specific physiological responses in plant systems.
- Screening of hundreds of samples per experiment.



4



PROVEN ABILITY TO PROVIDE COMMERCIALLY VIALE SOLUTIONS

- Extensive experience with field experiments
- Commercial function and research function are closely integrated
- Allows Valagro to fast-track product candidates with the best chance of attaining commercial viability



WIN THE GLOBAL CHALLENGE TOGETHER

