

THE FUTURE OF BIOLOGICALS....



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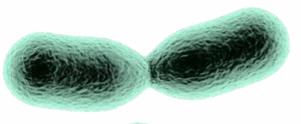
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FROM THE INVESTOR'S POINT OF VIEW



Investing in **BIOLOGICALS:** The right decision!

- A new multi-billion industry just starting out
- Projected growth set to outpace chemicals by more than 10% and profitable
- Growers' adoption heading in an upward trend
- Technology and market access will separate winners from losers
- Policies (e.g. farm to fork) and private endeavors



BioFirst

FROM THE INDUSTRY'S POINT OF VIEW



Biologicals will dominate the market in the next 10 years...

- With breakthrough technologies, speed of execution and market access...
- Top regulatory capabilities are a must!
- Production and supply chain aligned with the industry boom
- Sustain margins through differentiation, cost reduction and full portfolio offer
- Bioherbicides: a turning point
- Ability to successfully enter USA and EU
- Move from 1st generation to the next (benefit I.P.)

FROM THE GROWERS' **POINT OF VIEW...**



- "I prefer bio as long as it performs at a reasonable cost!"
- Need for service at fertilizer, seeds and pesticide industry level (put people on the field)
- Biologicals are becoming a mandatory tool for yield increase and crop protection (it is unacceptable to plant today without inoculants, *Bacillus* and *Trichoderma*, at least)
- Unique core technologies with superb fit for row crops
- Change the perception of biologicals in the USA and EU

As a result, companies need to rethink their business models

Build high-performance organizations, enhance market access and always lead with **absolute passion**!

