



THE FUTURE OF BIOLOGICALS....



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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



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!

