



*Promoting Seed
Business in
the Americas*

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Seed Applied Technology: Threats & Opportunities

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Seed treatment market changes in the last 5 years

Political / regulatory pressure

- Political engagement in industry shaping
- Regulatory complexity
- Neonics suspension in EU
- NGOs shaping perception



Technology evolution

- Products complexity
- Pest resistance building
- Non Synthetics options
- Equipment innovation



Tough economic conditions

- Low commodity prices
- Currency volatility
- Trade barriers



Competitive landscape

- Industry mergers
 - Intense generic activity
 - Adoption / Intensification
- Potential persists



Trends shaping the future of Seed Applied Technology

Safe products for humans and for the Environment

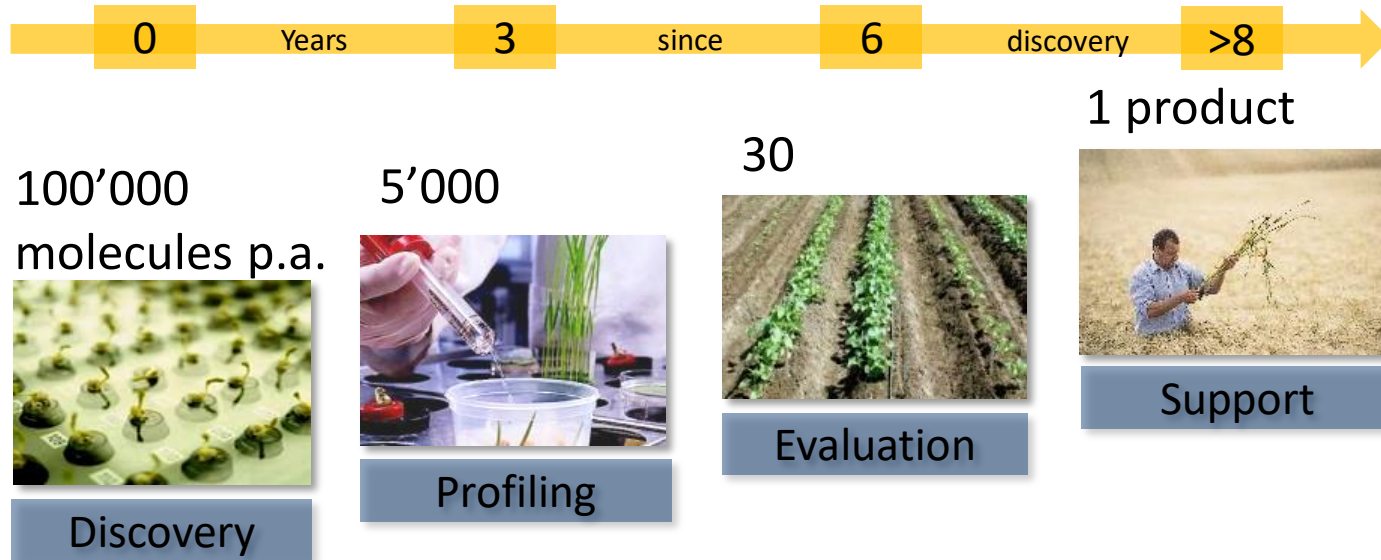
- New A.I.s no toxic for non targeted organisms
- A.I.s safe for humans
- Limited persistence in the soil
- Limited solubility to reduce ground water or free water contamination

Sustainability at the center of the production systems

Reduced release of A.I. volume into the environment

- Potent A.I.s with high activity at very low rates
- Less preventive use of Seed treatment.
- Targeted application. Lower exposure to non targeted organisms

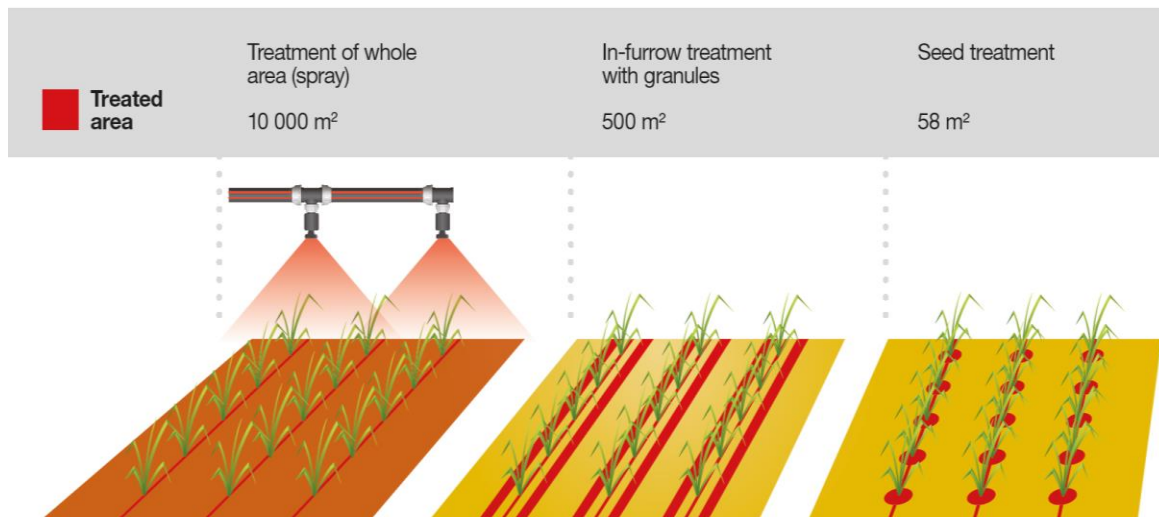
Long path and exponential cost to develop a new molecule



Total costs (USD m) 260

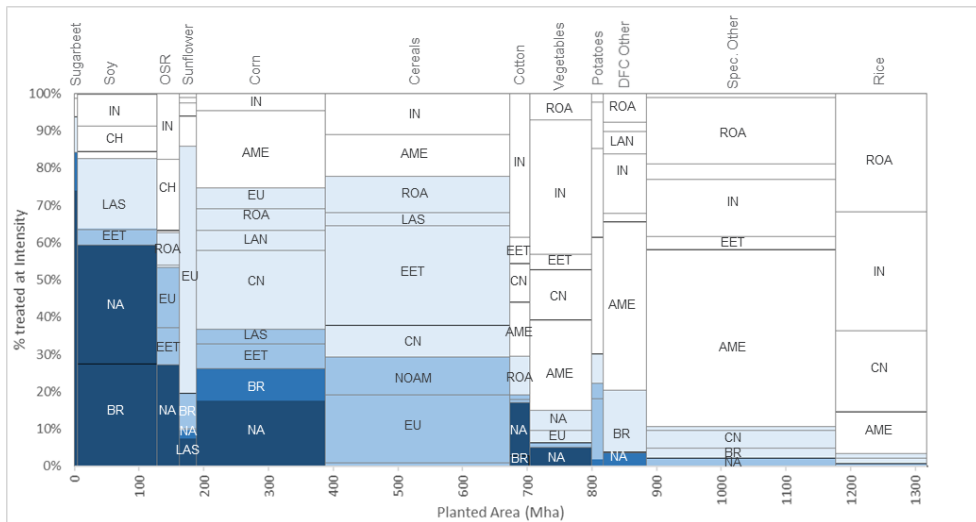
Seed treatment is a highly efficient technology to control seed and soil born diseases and early season pests

With granule or in furrow application, the application rate of active ingredient per ha can be up 10 times higher than that with seed treatment.*



* corn, insecticide

Opportunities derived from new trends



ST Intensity	~\$/ha
V High	>8
High	6-8
Med - High	4-6
Med - Low	2-4
Low	<2

} Increase Intensity in Developed
and Emerging Markets

} Increase Adoption in Emerging
Markets

Seed Treatment Market Drivers

- ✓ Best and most convenient plant protection option in first month
- ✓ Precise application / low chemical use rate
- ✓ Shift to higher value seeds (hybrids, traits); investment protection
- ❖ Increasing industry consolidation
- ❖ Political and Regulatory Pressure

Opportunities derived from new trends



Specialized A.I.s

control pests or diseases not affecting non targeted organisms



Environmental friendly A.I.s

adequate solubility, persistence in soil, toxic profile, etc.

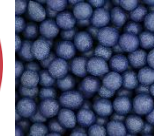


**Collaboration between
Companies and institutions**



New application technologies

- Targeted application
- Safe application



Non synthetic A.I.s

Complementing, enhancing or replacing some synthetic products