



Reinventing Food Protection

ABIM, 22 October 2019

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AgroSavfe

Shaping the future of
sustainable and safe food
supply with protein-
based biocontrols

Confirmed Crop Protection Spectrum Addressing Critical Market Needs

BioFun-1



Botrytis cinerea



Anthracnosis



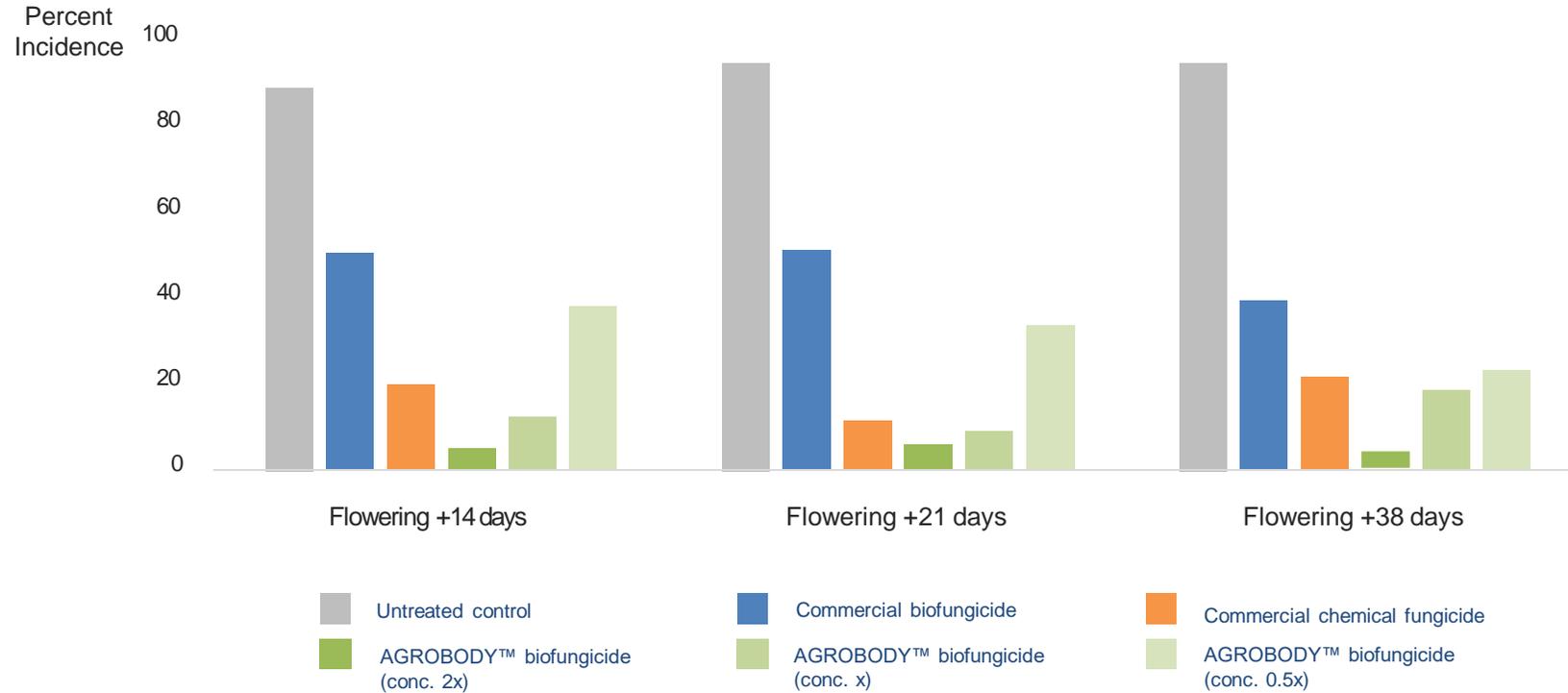
Powdery mildew

Photo by CSIRO Science Image via Wikimedia Commons; Photo by Pollinator: Wikimedia Commons; Rust photo by Howard F. Schwartz via Wikimedia Commons



Field Performance On Par With Chemicals

Strawberry **in field** disease protection (*Botrytis cinerea*)



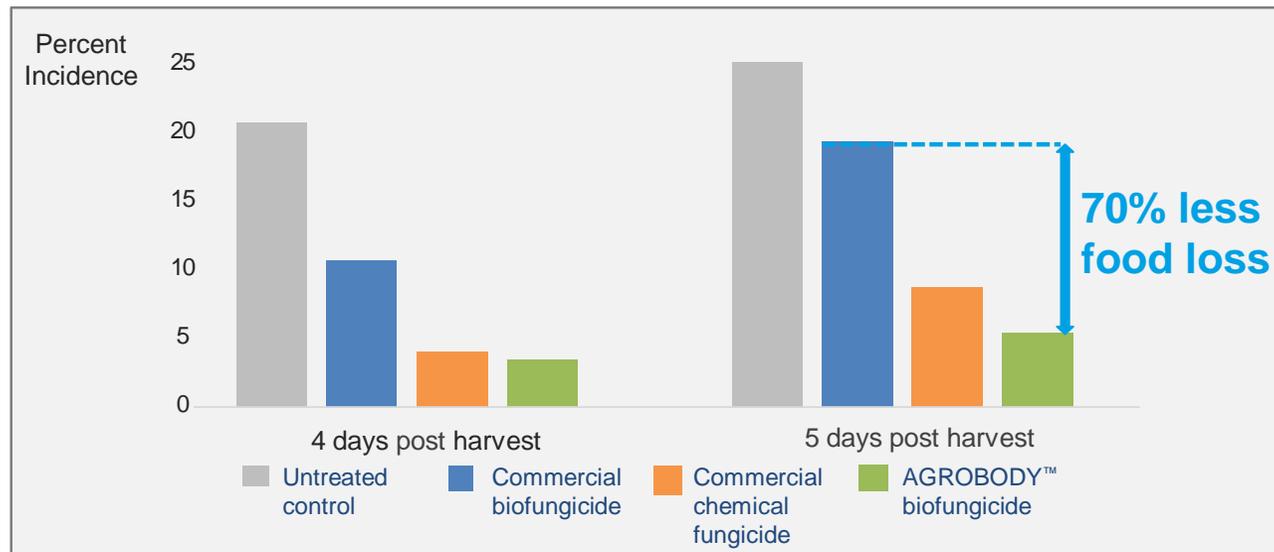
AGROBODY™ biofungicide protects high value strawberry crops on par with chemical standards



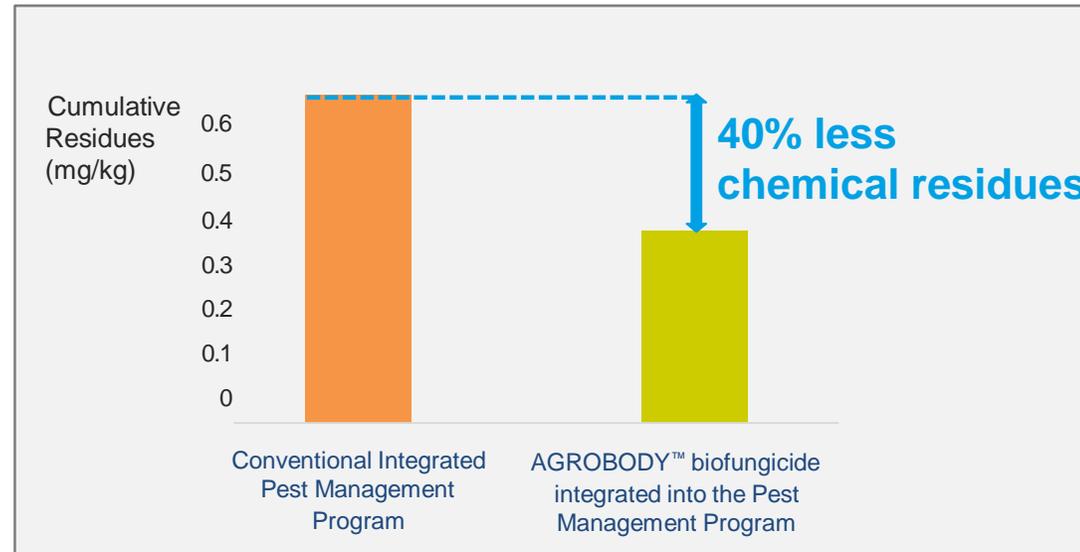
Results from one-to-one pure product comparison – no Integrated Pest Management (IPM) spray program applied
Source: AgroSavfe trial 2018, Georgia (US)

Less Food Loss, Less Residues

Strawberry post harvest disease protection (*Botrytis cinerea*)



Strawberry post harvest lower residues



Source: AgroSavfe field trials and fruit analyses, 2018



AGROBODY™ biofungicide:

70% less food loss
(bio-production – post harvest)

40% less chemical residues
(IPM program)



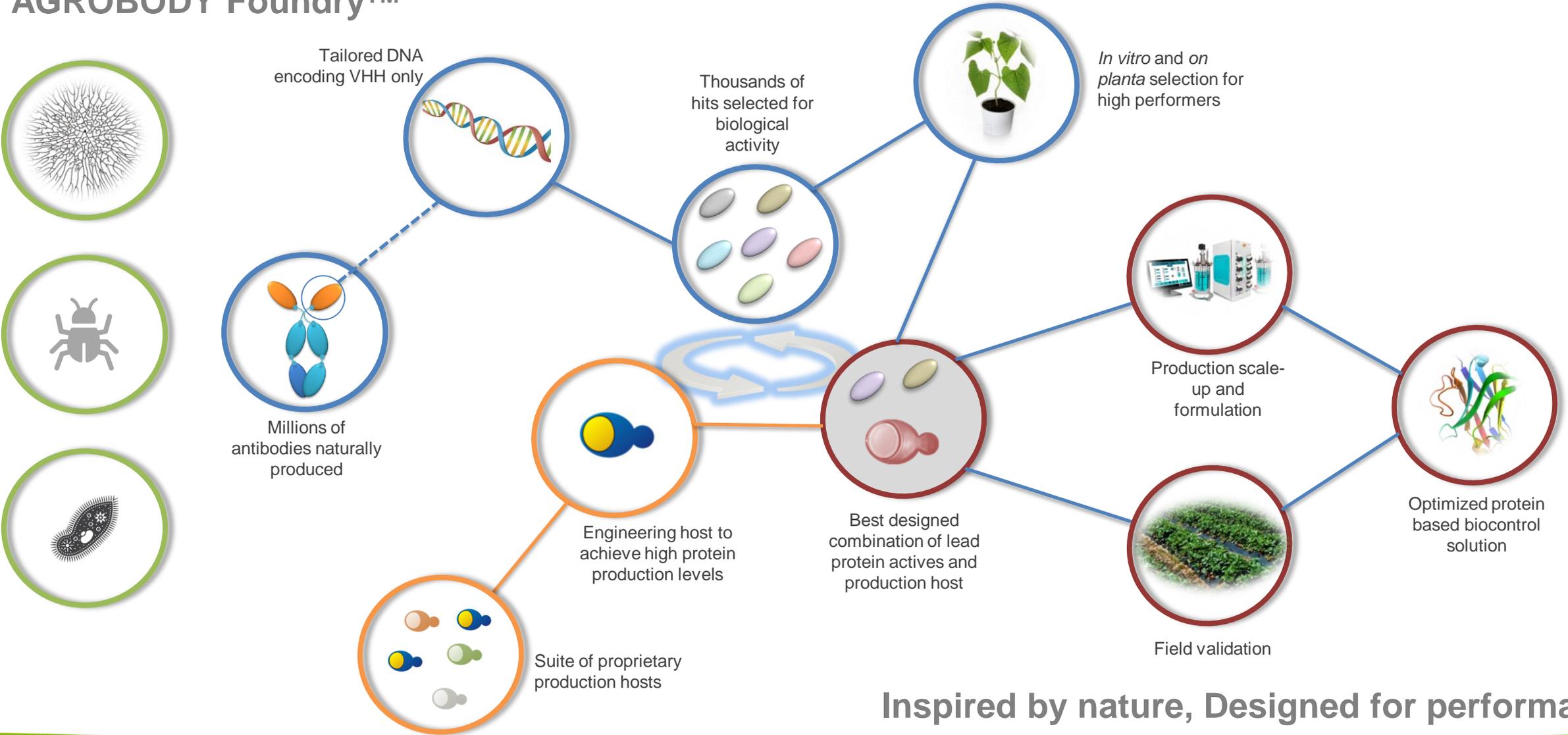
Premium end-season spray to control critical diseases, minimize residues and extend post-harvest quality



**Versatile Technology
Broad pipeline and
Competitive R&D costs**

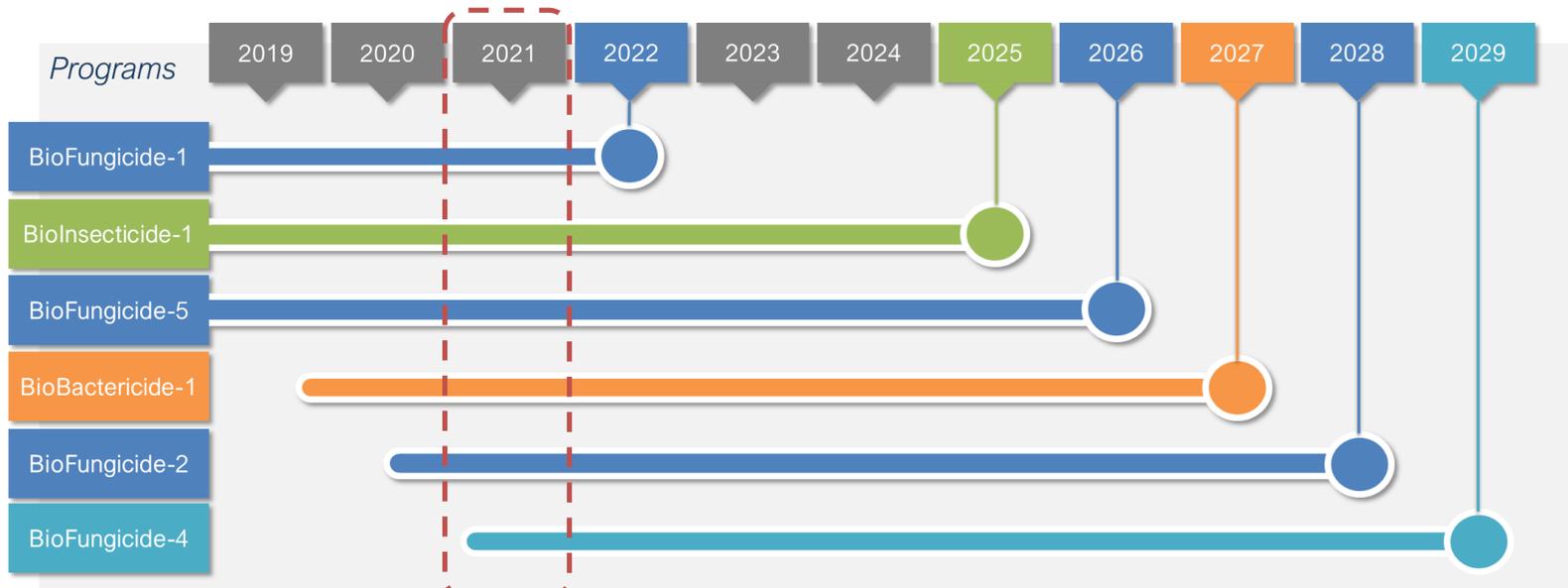
Collaborative Evolution Platform For Economic And Reliable Performance

AGROBODY Foundry™



Inspired by nature, Designed for performance

Unique Biocontrol Product Pipeline



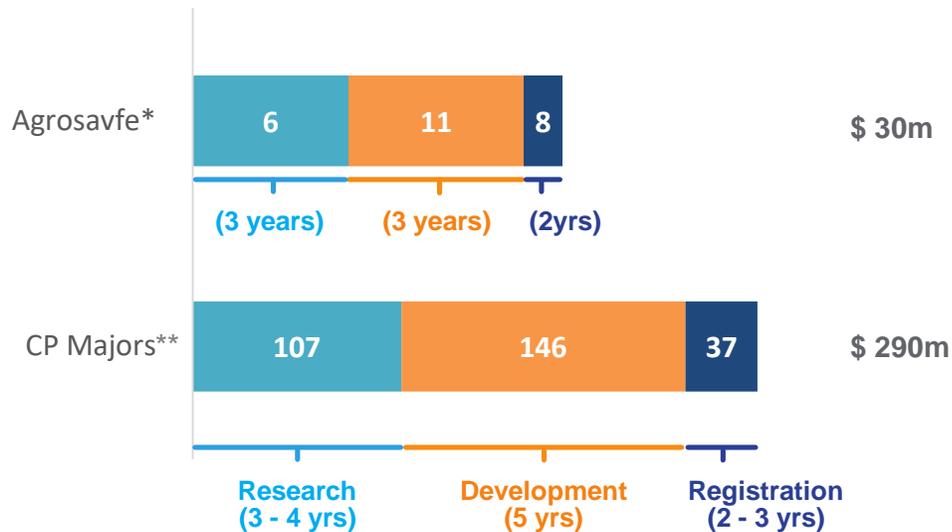
- Platform validated with versatile product pipeline, addressing >\$5bn of the total CP market
- Go-to-market direct and/or with partners
- Exploring high value R&D partnerships

<i>2021 Product Pipeline Projection</i>	Discovery	Technology Development	Product Development	Market Development	Launch	Addressable Market (\$m)*
BioFungicides						
BioFun-1	[Progress bar]					800
BioFun-5	[Progress bar]					1,200
BioFun-2	[Progress bar]					1,700
BioFun-4	[Progress bar]					800
BioInsecticides						
Biolns-1	[Progress bar]					400
BioBactericides						
BioBac-1	[Progress bar]					300

Strategic Partnership

....Underpinned By Efficient R&D At Lower Cost

Comparison Research and Development time and costs



*Agrosavfe dev cost based on average BioFun-2 and Biolns project using Discovery process

**Source: P.McDougall CP Research Report, March 2016.

- CP Majors take 11.3 yrs to develop new chemical active at cost of ~ \$290m
- AgroSavfe R&D process time 8 yrs at cost \$25-35m
- Faster market entry enables more time to exploit strong IP positions and build earlier market share ahead of competition
- AgroSavfe lower R&D costs allows entry into “orphan” pest targets



Protein-based biocontrols

Reinventing Food Protection

A Firm Ambition To Grow On Solid Foundations

Company Profile

- Founded in 2013, raised € 51M from international private investors
- 50 employees - 10 nationalities
- International expansion plan



Unmatched capabilities

- **De-risked, scalable R&D platform** for novel protein-based biocontrols
- **Broad product pipeline:** BioFungicides, BioInsecticides, BioBactericides
- Targeting high growth biopesticides segment in **>\$54 Billion** crop protection market



Products and Pipeline

- Combining **high performance** of chemical pesticides with **clean profile** of biologicals
- Go-to-market pathway endorsed by US, JP and EU regulator
- Expected **launch** of 1st BioFungicide in **2022** in US followed by EU and other regions globally
- From idea to market: 4 years **faster**, at 10% of development cost, with high regulatory **certainty**
- AGROBODY™ biocontrols to drive **double digit biopesticides market growth**

Experienced Leadership Strong Team



 Patrice Sellès
CEO

syngenta 

 Luc Maertens
COO

syngenta 

 Hilde Revets
CSO

 VAXINFECTIO
Vaccine & Infectious Disease Institute
University of Antwerp 

Hiring
CBO

Hiring
CFO

 Mike Stepan
Market & Product Development

syngenta 

 Patrick Stanssens
Manufacturing

 Ablynx 

 Mark Chadwick
Head IP

Merus 

 Michael Kock
License to Operate

syngenta 



42 dynamic and driven scientists
make up our team of experts in
Technology, Agriculture &
Industrial Applications

Firm Ambition To Grow And Create Value



FLEXIBLE, SCALABLE TECHNOLOGY PLATFORM

- Disrupting the food protection industry, generating 1 new MoA every 2 years
- In house strain engineering linked to high throughput testing
- Producing @ COGS for row crop applications
- Identifying novel targets for key plant pathogens & insects



DIVERSE PRODUCT PIPELINE

- BioFungicides, BioInsecticides, BioBactericides
- 3 Products in full development, for F&V and row crops
- Pipeline of bioactives in pre-development phase (3 programs)



ENTERING \$30Bn MARKET SEGMENT

- Launch first BioFungicide planned for 2022 (US) followed by other regions globally
- Regional Crop Protection go-to-market approach
- Strategic partnerships for adjacent food protection markets
- R&D collaborations for high value targets

Transforming food protection with unique protein-based biocontrol solutions,
shaping the future of sustainable and safe food supply



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