THE FUTURE OF BREEDING IS NOW

AIPH annual congress Beijing, China
Biense Visser
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OUTLINE

- About Dümmen Orange
- How we invest in our customers' success
- Towards 2030
ABOUT DÜMMEN ORANGE

As leading floricultural breeder, we create sustainable value through deep customer understanding and innovative products.

- Global #1
- Focus on 10 flower crops
- Grow revenue to accelerate innovation
- Ambition: >25% market share

- Product differentiation focus
- Realizing economies of scale
- Outstanding services with staff plus digital tools

- Integrated Pest Management
- Active global CSR program
- Caring of carbon footprint

- Global sales network
- In direct contact with growers and retailers
- Investing in customer intimacy
- Investing in partnerships

- Frontrunner new breeding, rooting and growing technologies
- Intellectual Property

DÜMMEN ORANGE
DÜMMEN ORANGE AT A GLANCE

- **7,300** employees
- **190** R&D professionals
- **20** production locations
- **330+** hectares of production
- **1,000+** IP titles & brands
- **3,000** + patents
- **2.0bn** + cuttings per year
- **11,000** + customers
- **€350m** sales
Strategic focus on scale & innovation

GROWING OUR BUSINESS

HIGHLY QUALIFIED STAFF

DIVERSIFIED MARKET WITH WHITESPACE

INDUSTRY TRANSFORMING LIKE VEGETABLES INDUSTRY

HIGH AND INCREASING BARRIERS TO ENTRY

ABUNDANT M&A OPPORTUNITIES
LEADING THE TRANSITION

FIELD CROP AND VEGETABLE SEED MARKET

€bn

1990s Today
14 >40

3x value growth driven partially by moving from traditional breeding to trait and hybrid breeding

FLOWER BREEDING MARKET

€bn

1990s Today
14 ?

Dümmen Orange is leader in breeding, rooting and growing technologies
- Shortening breeding cycle
- Increasing faster market responsiveness
MEETING CUSTOMERS’ NEEDS THROUGH EXPANSION OF CROPS AND TECHNOLOGY
ABOUT INTELLECTUAL PROPERTY

- IP
- COMPANY SECRET
- BRAND
- IDEAL STATUS: HARMONIZED
- PLANT BREEDERS RIGHTS
- PATENT
- PLANT VARIETY PROTECTION

Coca-Cola®
INVESTING IN OUR CUSTOMERS’ SUCCESS
INVESTING IN OUR CUSTOMERS’ SUCCESS
LEADING BY EXAMPLE
LEADING BY INNOVATION

PROBABILITY OF SUCCES

→ From >100 traits, 31 active projects (focusing on top 12 crops with highest value)
Minimal Chemicals, Maximum Quality

1. Sustainable Vision

2. Greenguard Method

3. Supplying the World

4. Creating Growth

5. Happy Consumer

Dummen Orange
Digitizing customer Support
HELPING CUSTOMERS TO GROW BETTER PRODUCTS
REDUCE COSTS AND COMPLEXITY WITH GROUND BREAKING ROOTING TECHNOLOGY

- Advanced root development with no growing media
- Ships directly from off-shore rooting locations
- Ready to transplant directly into finish containers
- Biodegradable cartridges
- Now available for wide range of Annuals and Perennials (Impatience, Coleus, Dahlia, Osteospermum, Calibrachoa, Salvia, Phlox, Verbena, etc)
Dümmen Orange

TOWARDS
THE FUTURE
Dümmen Orange

TOWARDS THE FUTURE
THE CONSUMER IN 2030

- More urbanized (apartment plants, landscaping, vertical farming)
- More digital than ever (online ordering, mass automation, Internet of Things)
- Wants robust plants, low maintenance (foliage, garden performance)
- Sustainability hygiene factor for plants (full transparency)
- Growing consumption in Asia

FLOWERS AND PLANTS IN 2030

- Breeders become plant designers
- Significantly higher yield, product performance, robustness and consume less resources
- Driven by fashion and consumer trends

THE GROWER IN 2030

- Continues consolidation, a concentrated group of efficient growers provides 80% of the volumes
- Operates automated: high-efficient with zero waste, artificial intelligence-driven cultivation
- Sells mainly via B2B digital platforms with big box retail as largest buyer
- Large growers want direct access to breeder via digital tools
- Produces chemical-reduced carbon-conscious
DÜMMEN ORANGE IN 2030...

- A well known reliable breeder of a broad and excellent product portfolio
- Has a global sales network with dedicated partners, driving customer engagement and customer intimacy
- Evolved into a floritech company with growing license income
- A leading digital enabled company
- Preferred business partner for growers and retailers
- One of the top-3 floriculture companies, controlling >50% of the global floriculture market
for you

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