

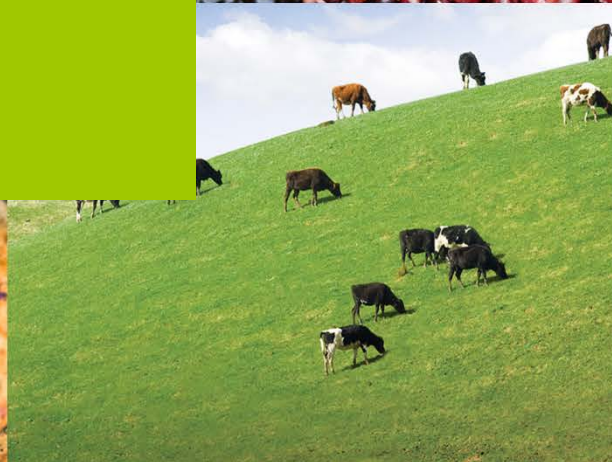


Olam



Essential Elements

November 2, 2016



An Overview

- In **27 years**, we have grown from a single product exporter, to a global agri-business leader, operating from seed to shelf
- Working in **70 countries**
- Organised into **16 platforms**, comprising **47 agri-commodities**
- Headquartered in Singapore and listed on the **Singapore Exchange (SGX)**
- Employing **62,500** full-time, seasonal, contract and temporary workers
- Supplying **16,200 customers** worldwide
- Sourcing from **4 million farmers**
- Operating **199 processing facilities** globally
- Managing **2.8 million hectares** of land

Our Portfolio – California Programs Highlighted

Edible Nuts, Spices and Vegetable Ingredients

- **Almonds**
- **Pistachios**
- **Walnuts**
- Cashews
- Hazelnuts
- Peanuts
- Sesame

Confectionery and Beverage Ingredients

- Cocoa
- Coffee

Food Staples and Packaged Foods

- Dairy
- Grains
- Packaged Foods
- Palm
- Rice
- Sugar and Sweeteners

Industrial Raw Materials

- Ag Logistics and Infrastructure
- **Cotton**
- Fertilisers
- Rubber
- Wood Products

Commodity Financial Services

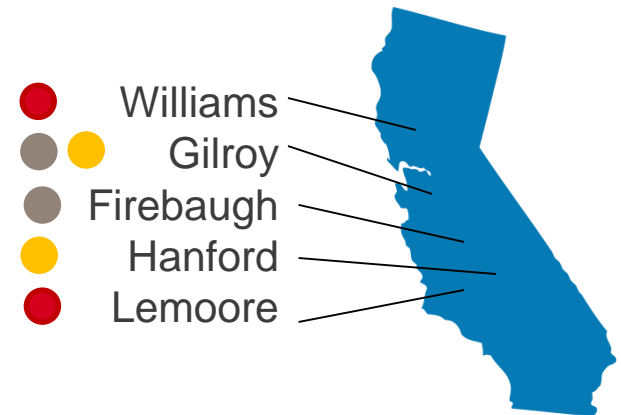
- Market Making and Risk Management Solutions
- Fund Management

- **Onion**
- **Garlic**
- **Parsley**
- **Tomatoes**
- **Purees**
- Capsicums
- Spices
-



Plants

- Tomatoes
- Onion
- Garlic



Processing Challenges

- Ag productivity vs land/water quality
- Ag/Manufacturing labor aging/exiting
- Energy – costs, regulatory changes
- Food safety / quality – FSMA requirements
- Documentation of supply chain - transparency
- Transportation infrastructure
- Meeting consumer trends – healthy, free-from, organic, minimal process, social media



Potential Technology Solutions

- Land management systems
- Soil/water quality improvements
- Seed developed for processed vs fresh
- Water markets
- Automation / robotics in plants
- Energy at source – solar, fuel cells, battery
- Cleaner emissions – how to meet SB32
- How people get knowledge / trained – web
- Food products that meet consumer wants



Thank you.