

EXPERIENCE AND POSSIBILITIES IN DOING BUSINESS WITH THE INDIAN DAIRY SECTOR

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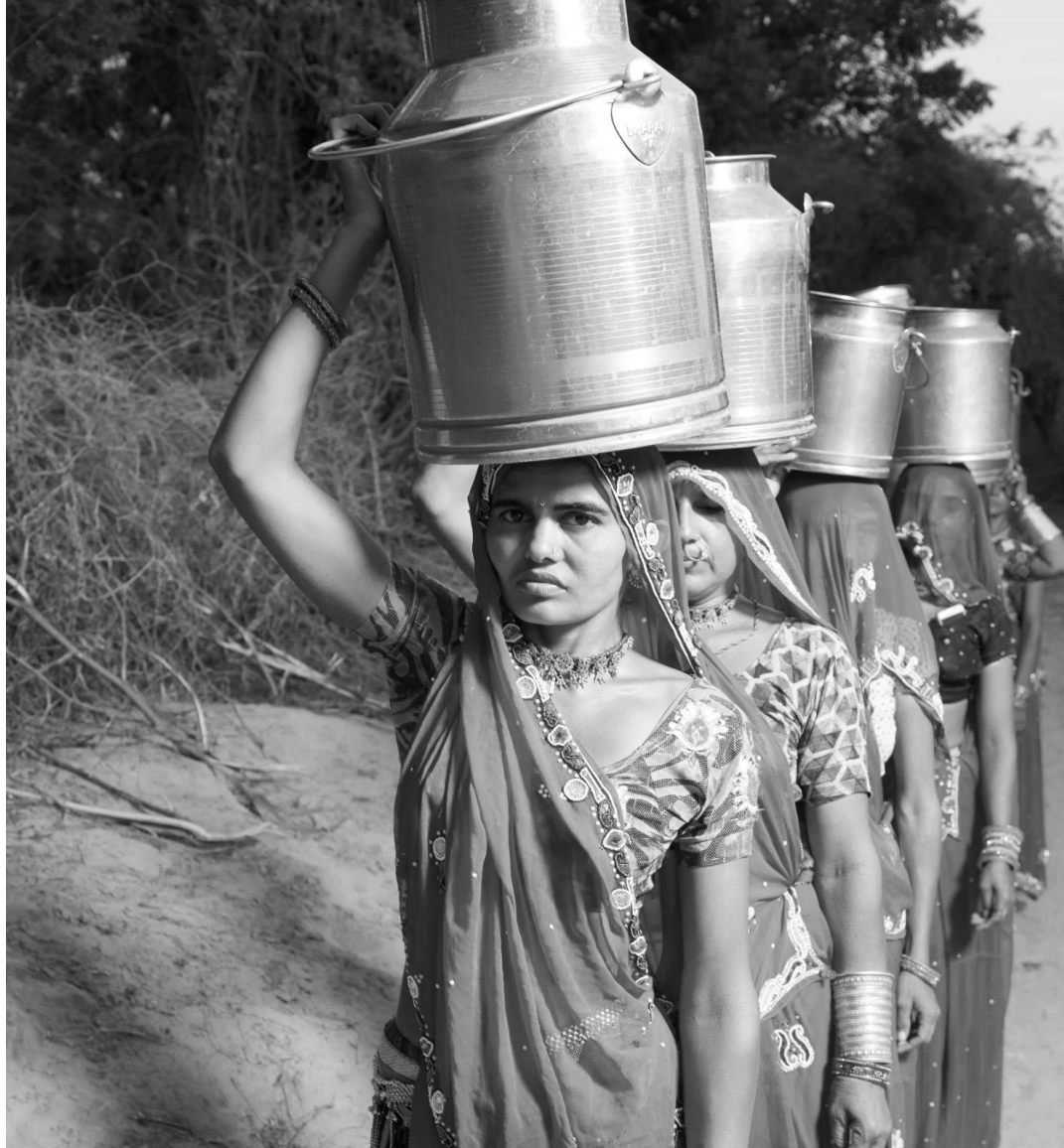
FOSS



ANALYTICS BEYOND MEASURE

BEING FIRST – BEING PRESENT

FOSS



ANALYTICS BEYOND MEASURE

BEING FIRST

FOSS' MISSION IS TO BE THE INNOVATOR AND PIONEER OF THE INDUSTRY

FOSS

Global #1 supplier of rapid analytical instruments to the Dairy industry for more than 50 years

- ❑ 80% of all milk produced on industrial scale globally is analyzed on one or more FOSS instruments
- ❑ Introduced MilkoTester in India in 1970 with more than 150,000 installations
- ❑ Introduced MilkoScan in India in 1980's reaching more than 400 installations
- ❑ Introduced MilkoScreen in India in 2014 with approximately 5,000 installations
- ❑ Introduced new generation MilkoScan in 2020 ensuring technological leadership
- ❑ Introduced Digital Service platform in 2020 with networking and remote services

BEING PRESENT

STRONG PARTNERSHIP WITH INDIFOSS ENSURING MARKET ADAPTION AND LONG TERM VALUE PROPOSITION

FOSS

INDIFOSS #1 supplier of rapid analytical instruments to the Indian Dairy industry

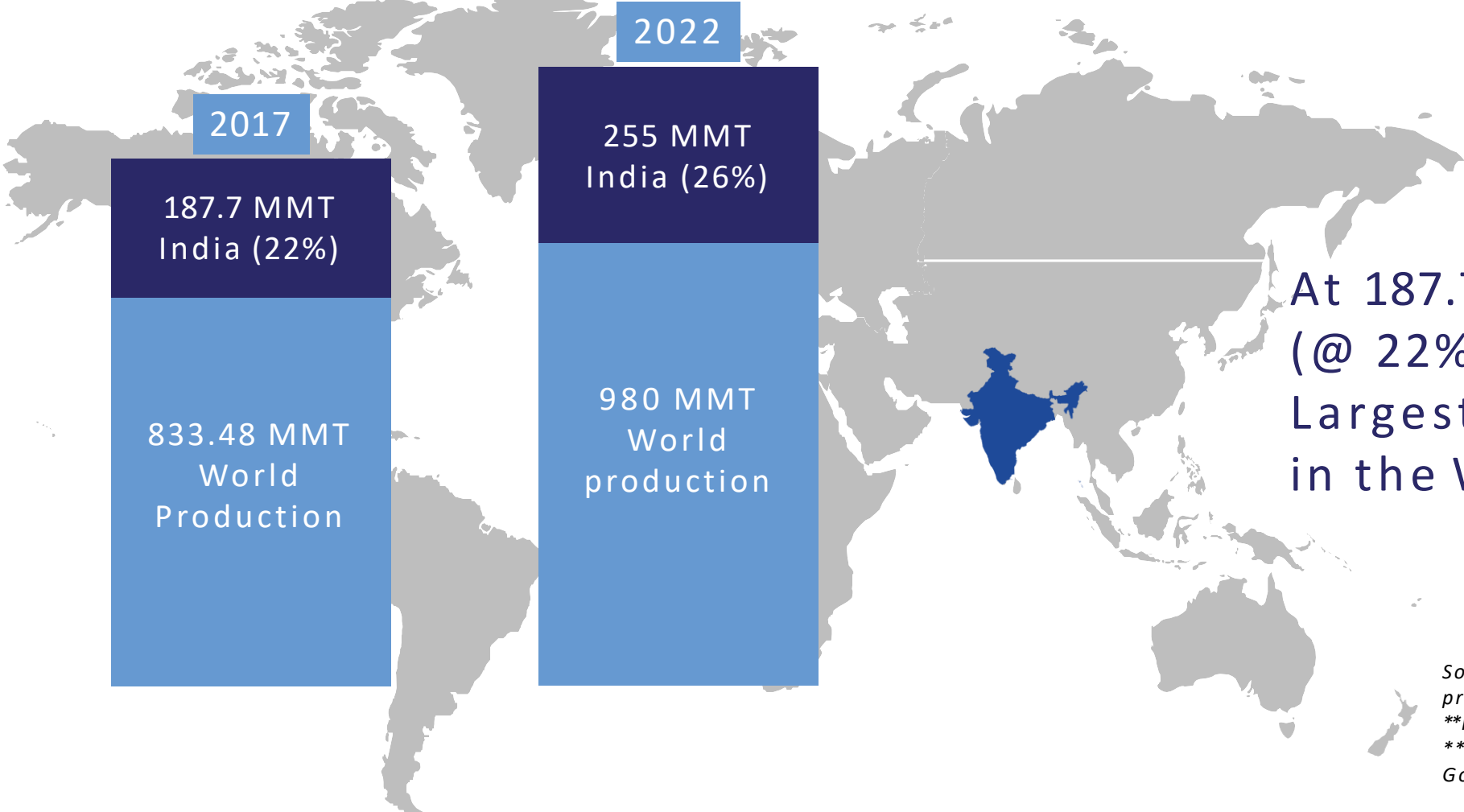
- ❑ > 5500 FOSS instruments and 45 service centers
- ❑ 135 employees including 65 service engineers
- ❑ Strong management with focus on customer satisfaction
- ❑ Synergies with PROMPT including farm management and milk collection systems
- ❑ Historic relation to AMUL / GCMMF
- ❑ Pan India presence including Sri Lanka and Nepal
- ❑ Strong innovational power
- ❑ Strong relations to authorities and government bodies

ACCESS TO AUTHORITIES - FOOD QUALITY

FOSS

- ❑ DAHD – Department of Animal Husbandry and Dairying
- ❑ FSSAI – Food Safety Standards Authority of India
- ❑ NDDB – National Dairy Development Board
- ❑ NDRI – National Dairy Research Institute
- ❑ CFTRI – Central Food Testing and Research Institute
- ❑ NIFTEM - National Institute of Food Technology Entrepreneurship and Management
- ❑ International Food Safety and Applied Nutrition
- ❑ State FDA's and FDA testing laboratories
- ❑ Private Testing Laboratories
- ❑ Fisheries Research Institutes of India
- ❑ IIFPT - Indian Institute of Food Processing Technology
- ❑ IGMPI – Institute of Good Manufacturing Practices of India
- ❑ APEDA – Agricultural and Processed Food Products Export Development Authority

POSSIBILITIES: INDIA BECOMING THE MAJOR DAIRY MARKET



At 187.7 Million Tons (@ 22%) India is the Largest Milk Producer in the World

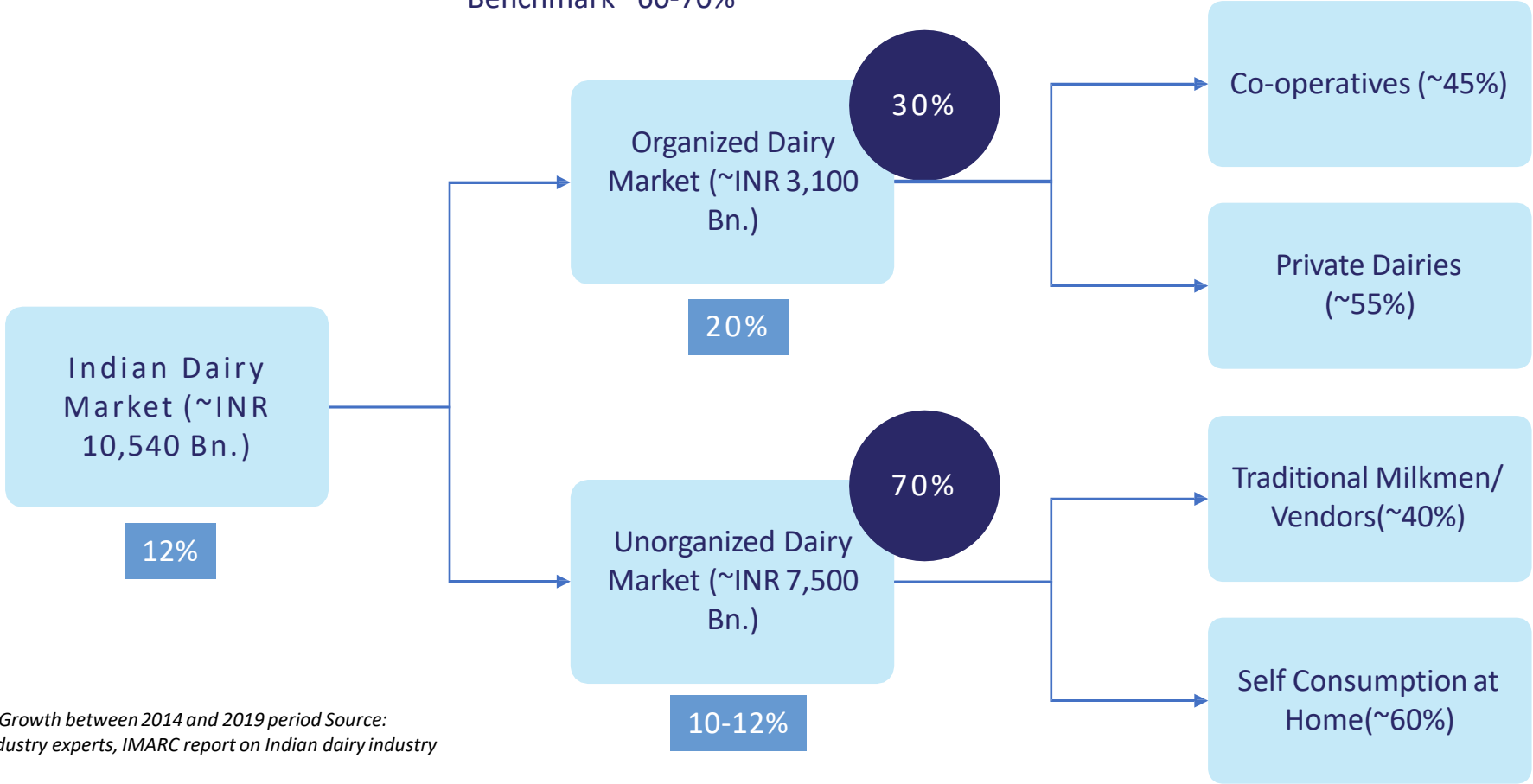
Source: *www.fao.org/dairy-production-products/production/en
**IFCN Dairy Report 2018
**National Action Plan – Vision 2022 (DAHDF Government of India)

ORGANIZED MARKET DRIVING GROWTH

WITH SIGNIFICANT UNLOCK POTENTIAL FOR THE SECTOR

Organize channels contribute ~30% of the market today, but growing at ~2X rate

Benchmark ~60-70%



■ Share of market (%)
■ 5 year CAGR %

1. Growth between 2014 and 2019 period Source: Industry experts, IMARC report on Indian dairy industry

PROMINENT DAIRIES

COOPERATIVE SECTOR

FOSS

ANALYTICS BEYOND MEASURE



PROMINENT DAIRIES

CORPORATE SECTOR

FOSS

