



UPL Japan brief

19 March 2021

Agenda

1. UPL Japan introduction
2. Recent progress in R&D in Japan
3. Collaboration with Japanese agrochemical firms

UPL in Japan



Sales Revenue
170M\$



Permanent Employee
120 person

Japanese domestic ag business

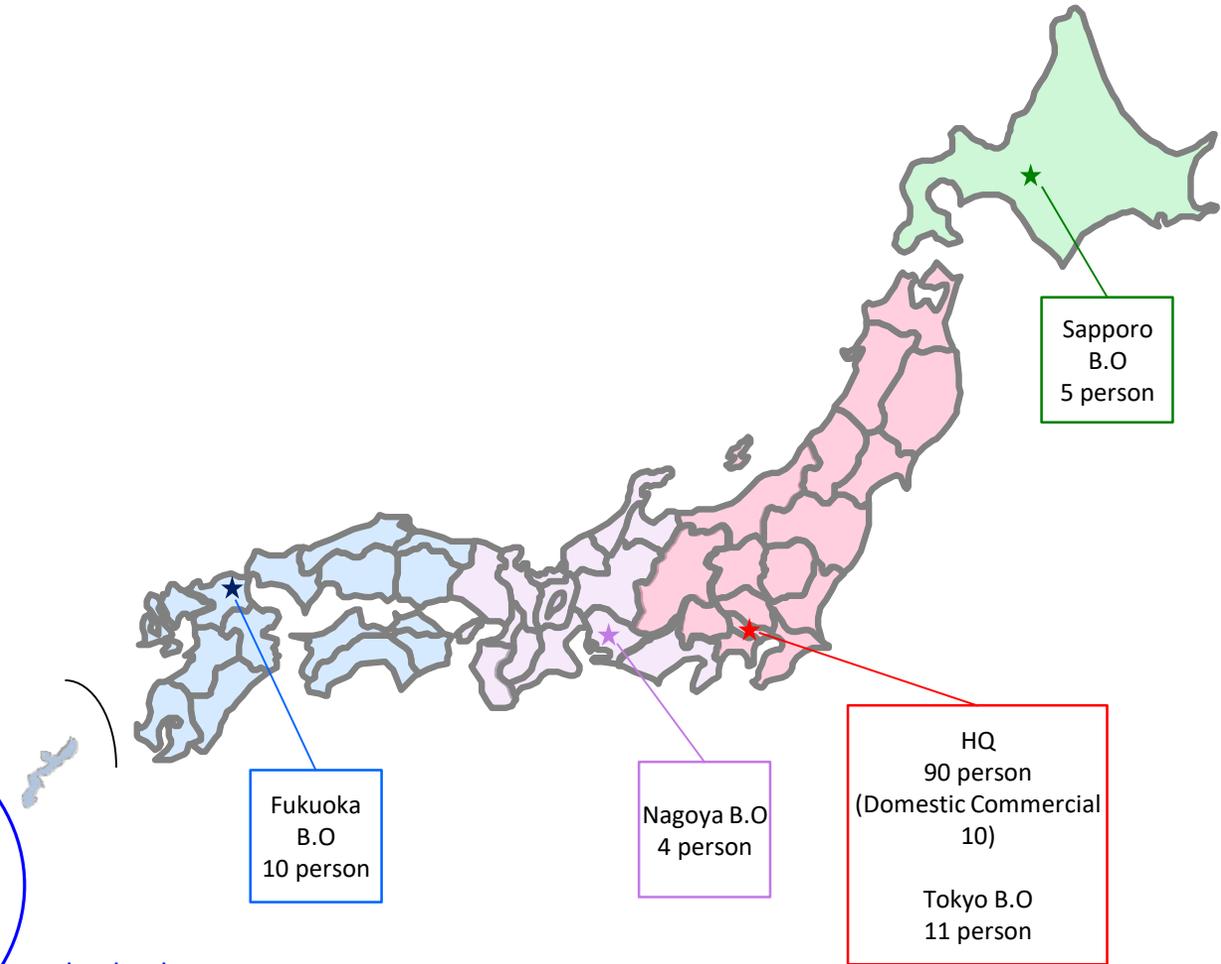


Main target market
Fruits & Vegetables

Chemical	Bio-solutions	Bio Stimulant
 Ai number 32	 Product 28	 Product 4

Total portfolio number
64

Market leader



Sapporo
B.O
5 person

Fukuoka
B.O
10 person

Nagoya B.O
4 person

HQ
90 person
(Domestic Commercial
10)

Tokyo B.O
11 person

Other Business in Japan

International Business Operations
(IBO)



UPL

Japanese AI
Manufacturers

Co-develop / License-in innovative products
UPL promotes them worldwide



Health & Nutrition Sciences
(H&NS)



H&NS

J-Producers

Provide various materials with J-Producers from around the world including Japan



Human Health &
Cosmetics intermediate

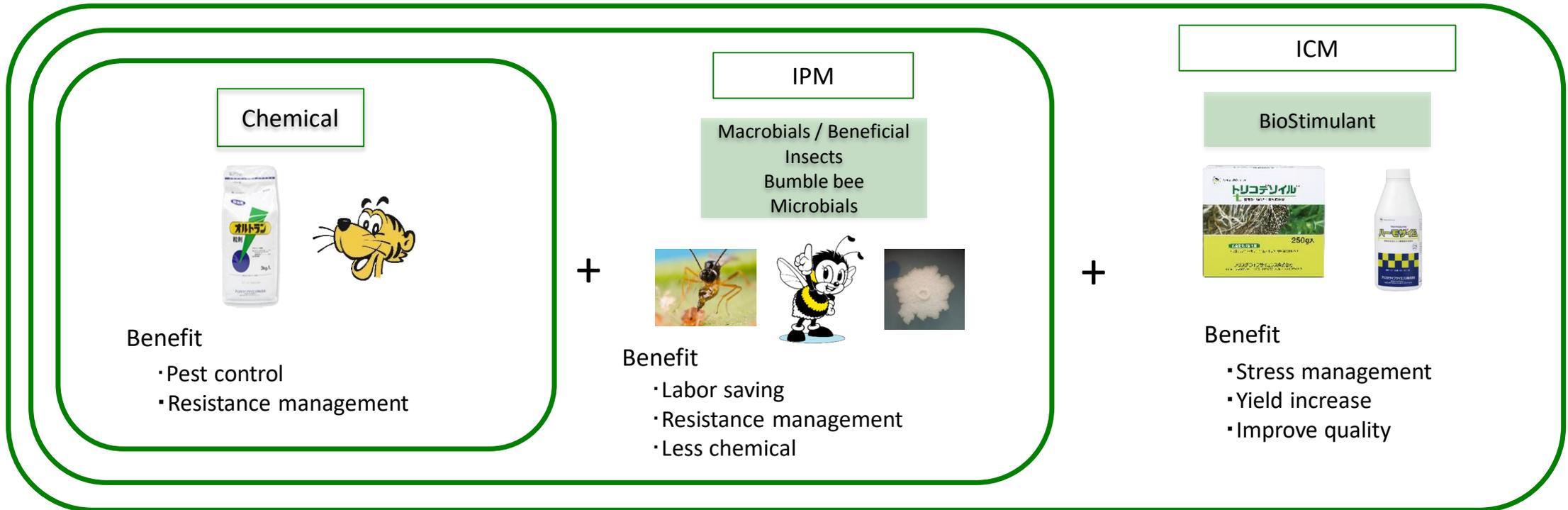


Animal Health

UPL Japan Domestic Business Strategy

Introduce Integrated Crop Management (ICM) concept

- The history of transition to ICM from agrochemical : Agrochemical → + IPM → + BioStimulant
- We are the only company which has three pillars : Chemical, IPM and BioStimulant.
- We can propose total crop management to growers
- Farmers can receive various benefits and value



Recent progress in R&D in Japan

According to IHS Markit, of the 35 products in R&D currently, around half, at 16, have their origins in Japan. This highlights not only the focus that companies in this region place on R&D but also the high degree of innovation. The success of Japanese R&D can be attributed to a number of different factors:

- Likely different decision criteria for placing a product into development compared to the rest of the world
- Japanese agriculture is highly protected
 - Higher food prices – Japanese consumer pay around 25% of their disposable income on food
- Products developed by western companies have to surmount higher financial hurdles to get into development, with minimum peak sales of several hundred \$m

PRODUCT INTRODUCTIONS AND R&D BY MAJOR COMPANY

Rank	Company	Introduced 1980-2020	Currently in R&D	Co- development / Licenced in
1	Bayer Crop Science	75	3	
2	Syngenta	62	3	
3	Corteva	62	2	1
4	BASF	40	2	1
5	Sumitomo Chemical	36	3	1
6	Nihon Nohyaku	15	1	
7	Kumiai	14	2	
8	Ishihara	14	1	
9	Mitsui Chemical	14	1	
10	Nissan Chemical	9	2	

- Japanese agrochemical firms are key source of new technology.
- Some of them have their own footprints in India. On the other hand, mid-small size companies including bio space need strategic partners like UPL.

Collaboration with Japanese agrochemical firms

- ❑ More than 10 firms distribute UPL's products in Japanese market
 - Revised pesticide law will facilitate generic registration and Technical sourcing change in Japan
 - Hold a joint venture company and invest in some firms as well

- ❑ For Indian market, various licensing deal with Japanese firms realized and many still under discussion
 - Japan's interest in India is increasing – India's large and growing market

- ❑ In India, UPL is manufacturing some products for Japanese agrochemical firms
 - “Make in India” initiative attract this opportunity

Appendix

UPL JAPAN unique portfolio

Concepts of the product and technical portfolio are;

- ✓ Product as macrobials, microbials and related items, advantage of the product portfolio with rich and unique product line-up, the largest product portfolio to lead the biological
- ✓ Technical as software application “Know-How”, advantage of the technical portfolio with own introduction techniques based on IPM program which UPL JAPAN has developed, effective and sustainable pest management
- ✓ Based on developing and managing both portfolio with own IPM program, UPL JAPAN is a company to lead the business with the cutting edge and unique portfolio

Product as Macro/Microbials and related items
SPICAL, SPIDEX, SWIRSKI, LIMONICA, Horiver etc.



Technical as Software Application introduction program
 “Know-How”
 IPM Program, Manual, Side-effect



Biological Protection Business in JAPAN : PDCA- Recipe to Success – Bio-solutions!!

**IPM Training
Spray calendar consulting**



Training and consulting to local distributors and growers



**Field work
Field inspection
and installation**



Checking IPM preparation, train the installation technics



Wrap up the field trials and evaluation, share the point of improvement and next step



**Workshop, Evaluation
and improvement**



Checking the effect, train the evaluation skills



**Field work
Management and evaluation**

