



Our vision —  
to become a  
global leader  
in specialty  
plant nutrition

**Specialty Agriculture**  
Fruits, vegetables  
and arable crops

**Ornamental Horticulture**  
Nursery stock,  
perennials, pot and  
bedding plants

**Turf & Landscape**  
Golf courses, sports  
fields and landscape

## Growing Solutions

### 2023 Sales



by Region

- 37% South America
- 36% Europe
- 12% Asia
- 7% North America
- 8% RoW

### Core Markets and Products

Specialty Agriculture	Ornamental Horticulture	Turf & Landscape
Controlled Release Fertilizers (CRF)		
Water Soluble Fertilizers (WSF)	Slow Release Fertilizers	
Secondary and Micro Nutrients		
Biostimulants	Biostimulants	
	Growing Media	Grass Seeds
Liquid Fertilizers	Liquid Fertilizers	
Straights (MAP / MKP / Pekacid)		
Plant Protection Products		
Adjuvants Water Conservations Agents		



**~3,650**  
Employees



**Sales to 110+**  
Countries

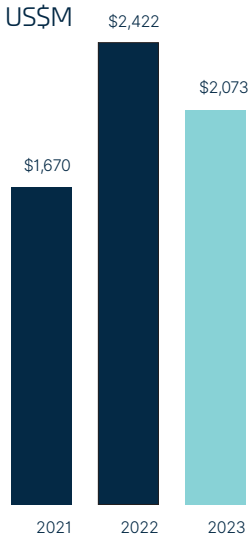


**9**  
Innovation Centers

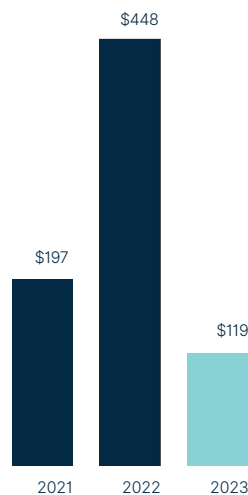


**700**  
Chartered Vessels

by US\$M

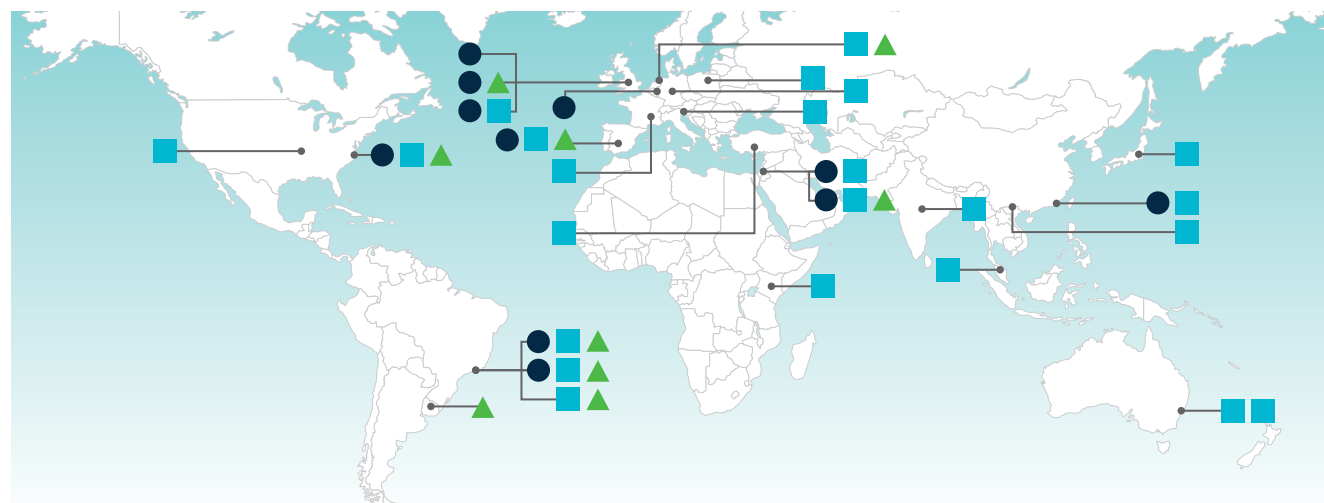


EBITDA US\$M



### Geographical Coverage and Production Sites

- Manufacturing Plant
- Sales Office
- ▲ Innovation Center





# Growing Solutions



## Specialty Fertilizer Market Footprint

✓ Higher activity    ✗ Lower activity

		Non-Specialty	WS-Straights	Modified Nutrient Availability	NPK Fertigation	Foliar	Turf	Coated NPK	Beyond Primary Nutrition	Organic
		<<< COMMODITY					DIFFERENTIATED OFFERING >>>			
<b>ICL</b>		✓	✓	✗	✓	✓	✓	✓	✓	✓
Leaders		✓	✓	✓	✓	✓			✗	✗
	<b>Mosaic</b>	✓	✓							✓
	<b>Nutrien</b>	✓						✓	✗	
Medium Players	Kingenta 金正大国际	✗	✓		✓	✓		✓	✓	
		✓	✓	✓	✓	✓				✗
Small Players						✓			✓	
			✓		✓	✓		✓	✓	✗
	Valagro Where science serves nature				✓	✓			✓	
	Biotech Concentrations specialist				✗	✗			✓	
				✗	✓	✓		✗		✗