

# ROQUETTE and its PEA supply chain



2018 July 12,

Workshop on "Supply Chains in the EU Protein Sector" in Chalon-sur-Saône France

The needs of the industry for value chain building - Bruno Ben Said ROQUETTE



# WE ARE A GLOBAL PLAYER

**1**

Global commercial network in more than 100 countries.

**5,000+**

Customers

**85**

Years of industrial and operational excellence.

**8,400**

Employees

**45+**

Nationalities

**20**

Industrial sites

**40**/years

Patents

**€3.3bn**

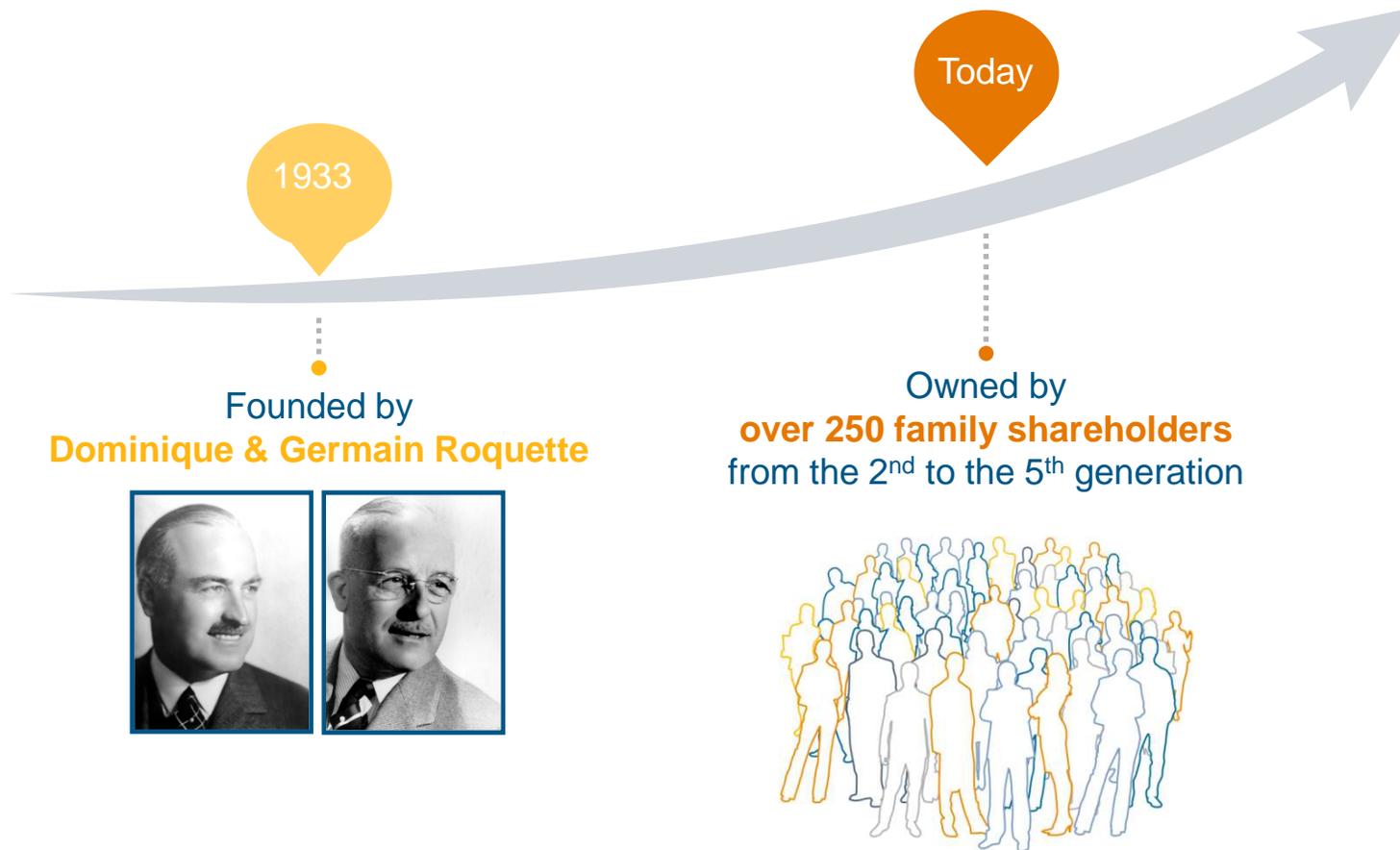
Turnover

**300+**

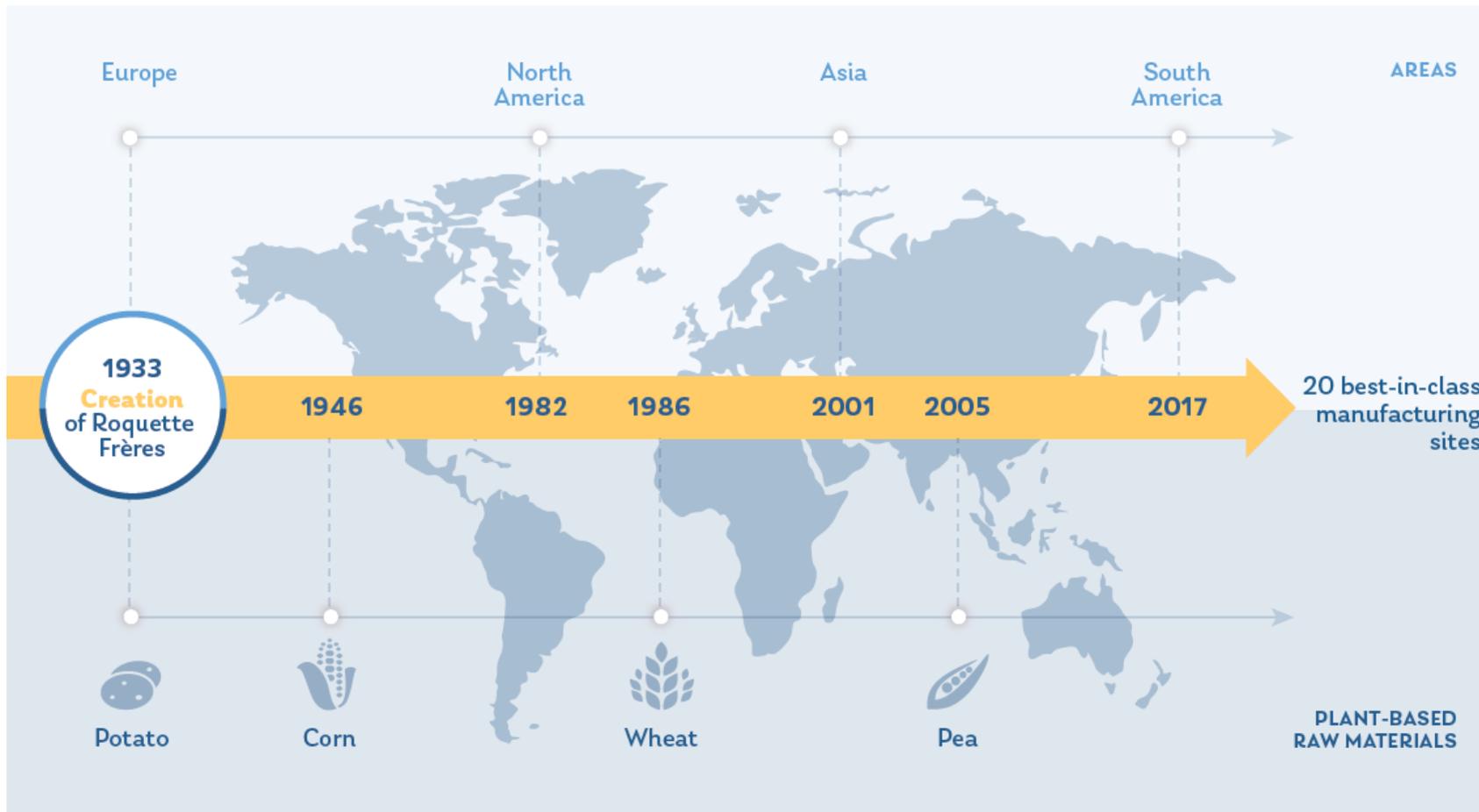
R&D workforce

# A LONG-TERM ENTREPRENEURIAL SHAREHOLDER COMMITMENT

A FAMILY-OWNED COMPANY SERVING CUSTOMERS GLOBALLY



# THE PROXIMITY OF A WORLDWIDE GROUP



# KEY MARKETS



Pharma



Cosmetics



Food & Nutrition



Animal Nutrition



Industries

## HIGH QUALITY INGREDIENTS FOR A HEALTHIER LIFESTYLE

Plant-based  
proteins for all

Roquette Beauté, all about skin  
health and nutrition

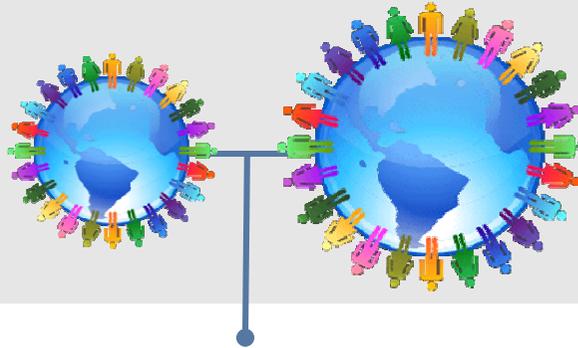
Orodispersible  
pharma solutions

Ingredients to balance  
our nutrition

Nutritional  
solutions for pets

# The indispensable Food revolution

The World is facing a  
**CHANGING &  
GROWING PROTEIN**  
global demand



in 2050\*

**9 to 10 billion** people to feed  
**+ 80 % demand for food**  
**Different Food consumption**  
habits



with **Multiple sustainability challenges\*\***



Over **1,6 billion** people are  
facing **water shortage**



By **2020**, global emissions will  
increase by **33%** from 2002 levels



**+ 82%**  
between **2000** and **2050**



**+ 102%**

Consumption of  
**meat and dairy**  
products should  
increase  
**< by**

We need between  
**10 and 15 kg** of  
plant proteins...



... to produce  
**1kg of animal**  
protein



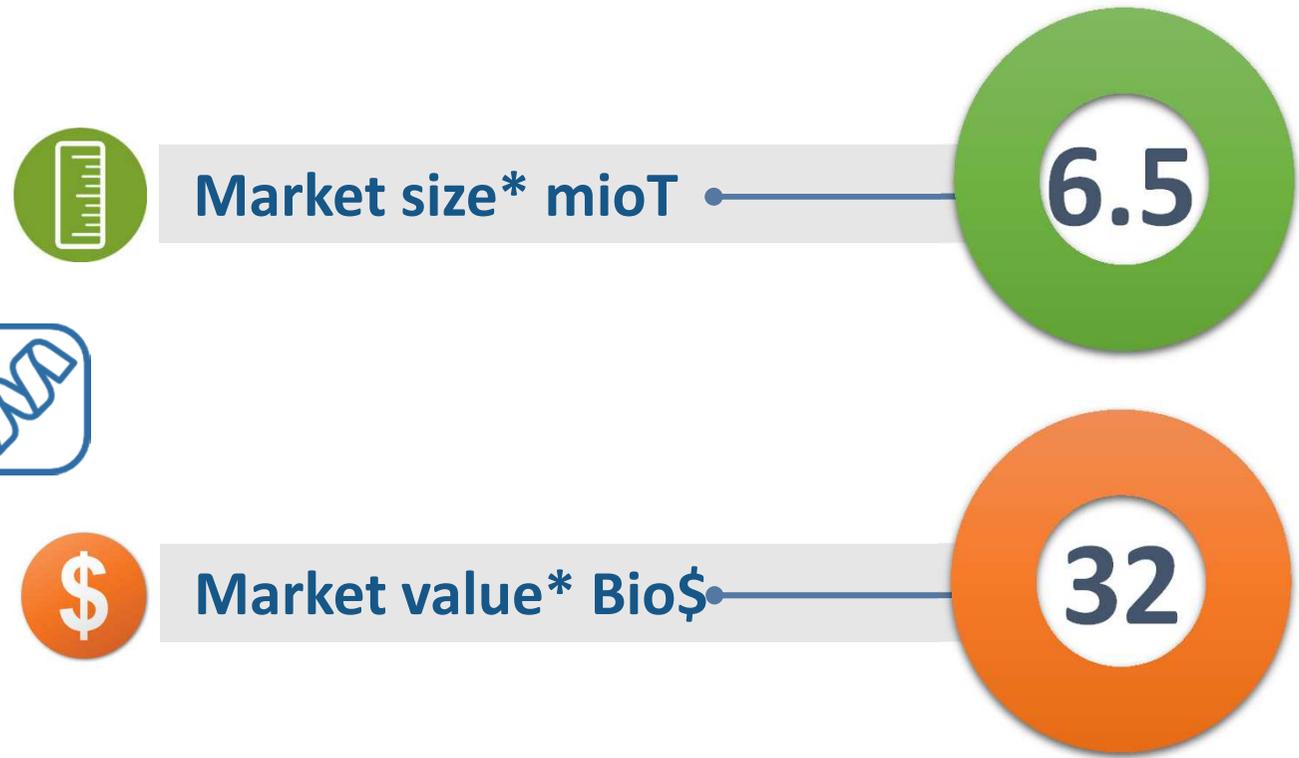
Animal feed requires  
**40 to 120 L** of water to  
produce **1 kg of protein!**



\*: ww.fao.org – FAO, 2009, How to feed the world in 2050

\*\* : McKinsey Global Institute: World Economic Forum: The Guardian: The Climate Group, SMART 2020; IFAD Rural Poverty Report 2011

# GLOBAL PROTEIN INGREDIENTS FOR HUMAN NUTRITION

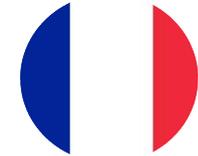


\* Source: Frost & Sullivan, Challenges Facing the Food & Agriculture Sector and Implications on the Global Protein Ingredients Market , Aug 2015



# A DEDICATED PLANT IN FRANCE: VIC-SUR-AISNE

From fields to Workshop



Full traceability



Physical process



High quality standards



Vic-sur-Aisne



2015  
40 M€

2017  
40 M€

- To strengthen the leading position
- To keep it at a state of the art manufacturing standard

- Quality & Food Safety: ISO9001 / ISO22000
- Customs-Logistics: OEA
- Food Safety: Halal / Kosher
- Feed Safety: EFISC / GMP+Feed
- Energy: ISO 50001 (2016)
- Environment: ISO 14001 (2018)

## ROQUETTE, PEA PROTEIN WORLD WIDE LEADER



Last investments to contribute to the growth of the company as a global Food, Nutrition and Health leader



**Vic-sur-Aisne (France) : First investments for pea in 2000s**

**2015 : 40€ million investment**

**2017 : 40€ million investment**



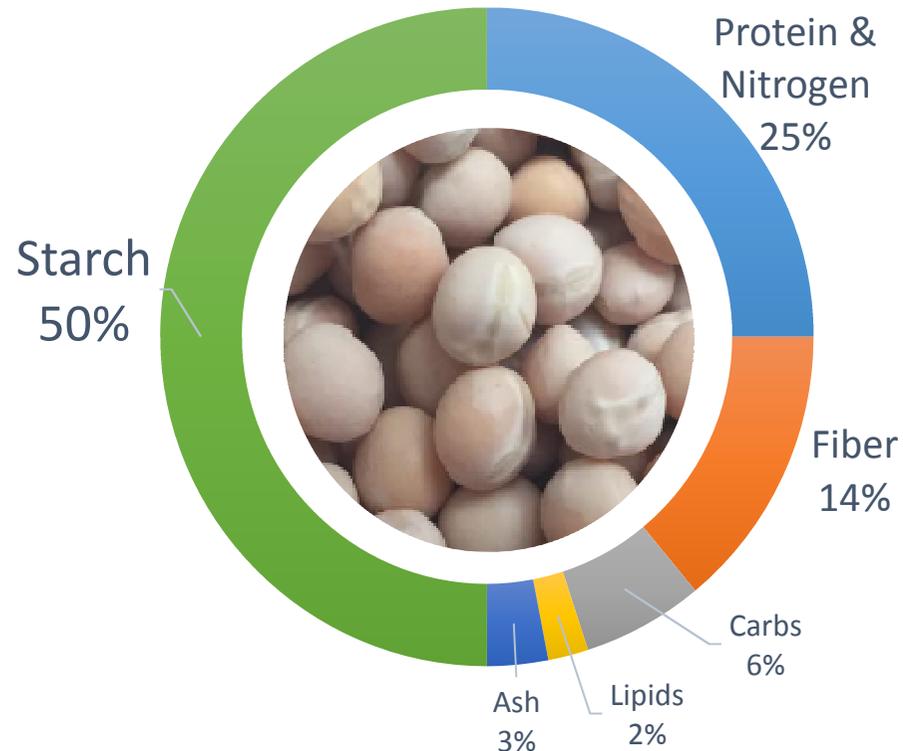
**Manitoba (Canada) : Greenfield**

**2017 : 300€ million investment**

**GLOBALLY IN 2019 : 250 000 tons/y as PRODUCTION CAPACITY**

# ROQUETTE VALORIZES 100 % OF THE PEA GRAIN

## Pea nutritional composition



Roquette is the **only pea protein supplier** having access to so different markets to **valorise all the pea fractions**



**ROQUETTE**

*Offering the best of nature™*

# 100 % OF THE PEA GRAIN IS VALORIZED

HULL



STARCH



PROTEIN



FIBRE

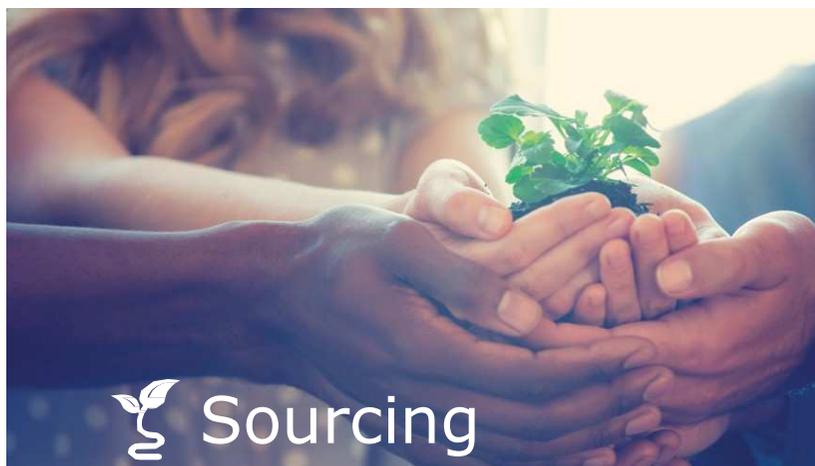


SOLUBLES



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## OUR SOURCING



Sustainably

### Our commitments

**1** SOURCE SUSTAINABLY

**2** IMPROVE CONTINUOUSLY OUR RAW MATERIAL  
QUALITY

**3** STRENGTHEN RELATIONSHIP WITH OUR RAW MATERIALS  
SUPPLIERS

### Performance indicators

We fully optimize all of our raw materials. They are derived from agriculture and as such annually renewable.

In 2025

we are committed to ensuring that

**20%**

of our supplies be certified or rated as “sustainable and responsible.”

# PEA: A BEST IN CLASS PROTEIN SOURCE!



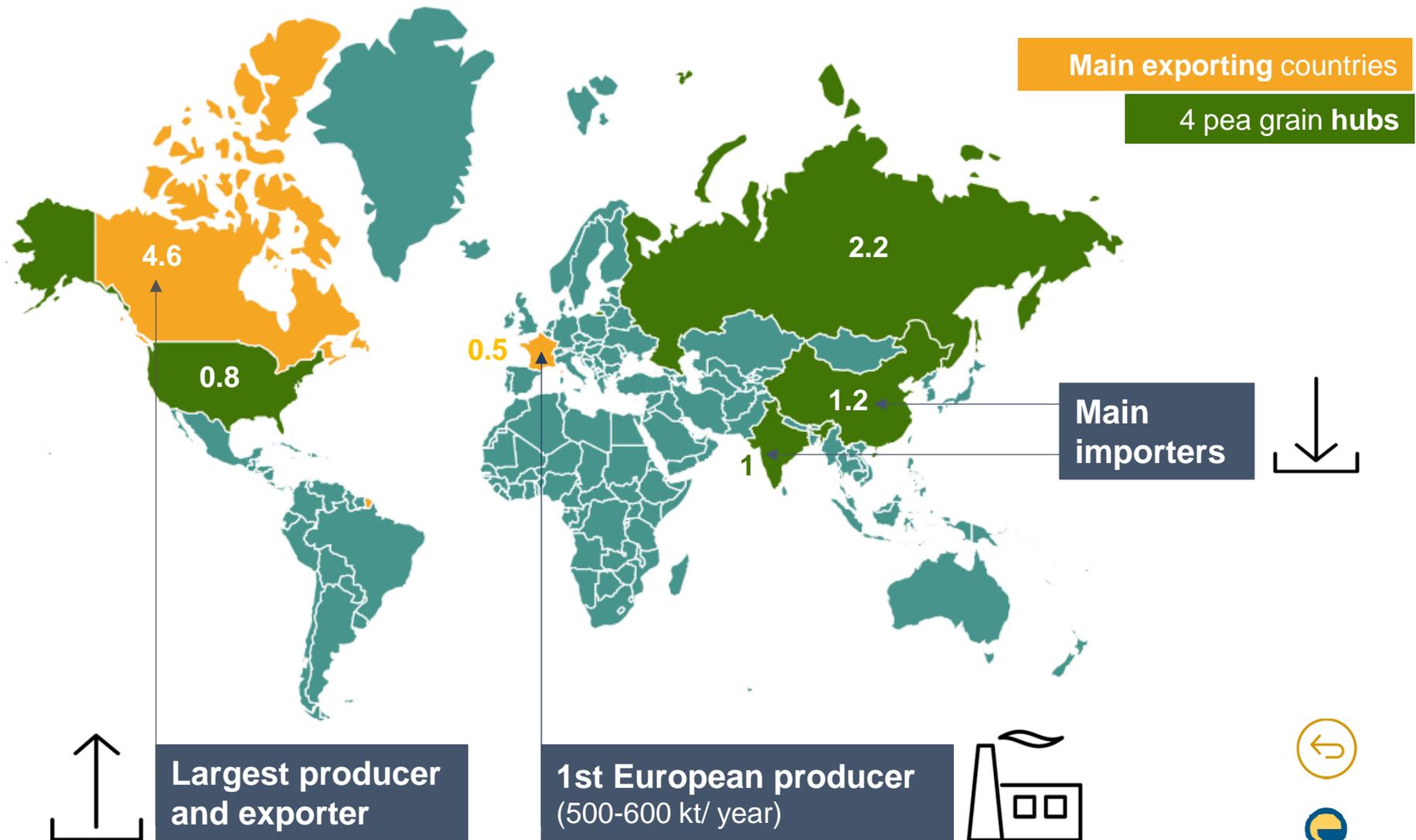
	SOY	WHEAT	LENTIL	PEA
<b>Sustainability</b>	✗	▲	●	●
<b>Non allergen</b>	✗	✗	●	●
<b>Non GMO</b>	✗	●	●	●
<b>Availability</b>	●	●	▲	●
<b>Affordability</b>	●	●	✗	▲
<b>Functionalities</b>	●	▲	▲	●
<b>Taste</b>	●	▲	●	▲
<b>Nutrition</b>	▲	▲	●	●

Status:  
 ● ▲ ✗  
 positive / intermediate / negative

Legumes are one of the best solutions

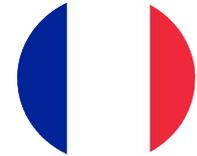
# PEA: A CROP WIDELY PRESENT WORLDWIDE

FAO STAT 2016 IN MILLION TONS

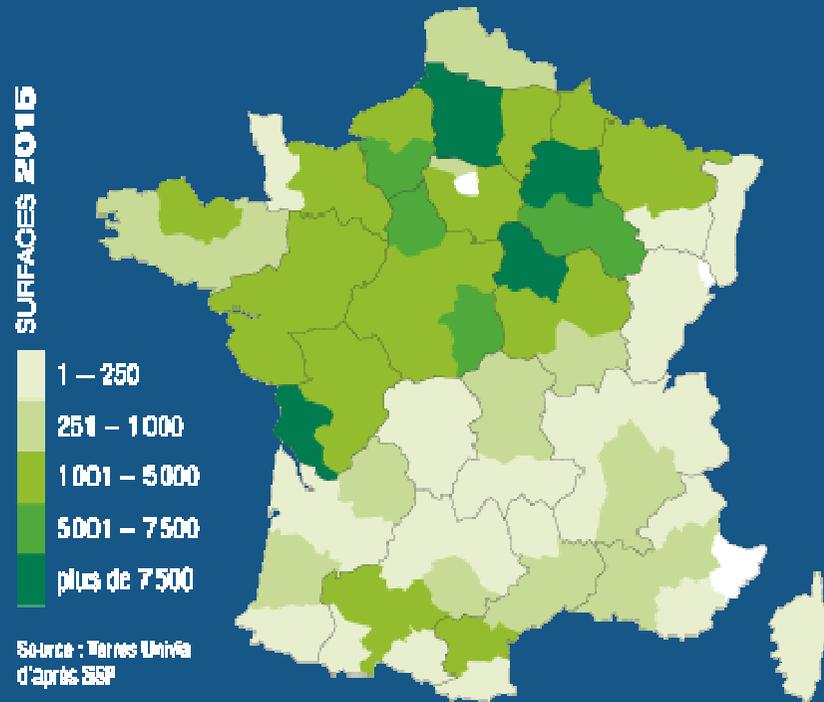


# IN FRENCH FIELDS

An ancient grain and regional ingredient



Main French regions cultivating peas in 2015 (ha)



**1st** producer of pea in Europe

**150 000 ha** are cultivated with peas

**~10 000** farmers are planting **yellow peas** for Food & Feed markets

**2000** farmers located around Vic sur Aisne are supplying our plant

# PEA FARMING = A BETTER YIELD ON THE NEXT CROP



## Advantages of a crop rotation with peas

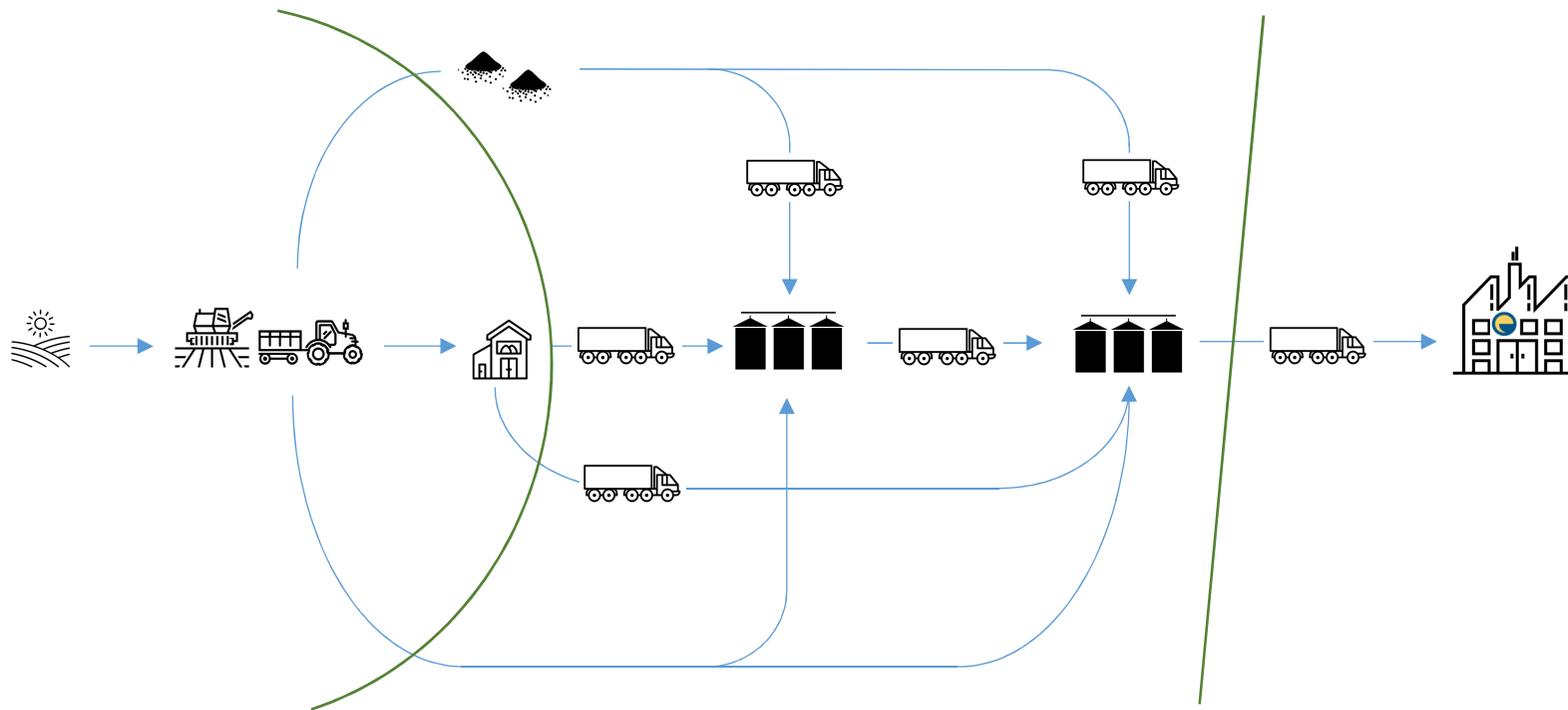
	 With wheat	 With rapeseed
Yield of the next crop 	+ 7,4 q/ ha	+ 0,5 to 3 q/ ha
Nitrogen fertilization 	-20 to -60 kg/ ha	-20 to -60 kg/ ha

# ROQUETTE FRENCH SUPPLY CHAIN

AGRICULTURAL WORLD

SUPPLIERS

ROQUETTE



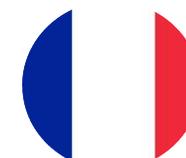
## ROQUETTE RAW MATERIAL SPECIFICATIONS

- Spring yellow peas with high thousand kernel weight
- High protein content
- quality standards – low pesticides
- Dedicated storage to preserve quality and avoid cross contamination with pesticides
- No contamination with wheat (allergen) & with soymeal or soybean (GMO)

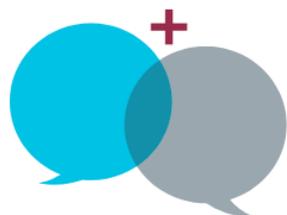
+ physical standard requirements mentioned in French addenda VII (broken grains, splitted grains, impurities, humidity, insects, etc. ).

# INVOLVED IN THE FRENCH AGRICHAIN...

Roquette is involved in the upstream part



Roquette invests in **internal agricultural skills** to:



**Advice on the agronomic conditions**

*Varieties, yields*



**Follow the crop cultivation**

*Inputs, storage*



**Implement specification with the upstream partners**

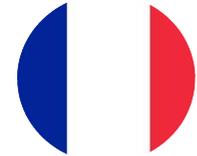
... and be **present in the French Interbranch** working groups with breeders, farmers, collectors, traders ...



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# ... WITH THE ACTORS OF THE AGRICHAIN.

Sustainable economy throughout the supply chain



Roquette is involved in 2 French working groups

PROTEASUPPLY



PEAMUST



Acting with all the actors of the protein crops supply chain to support the markets development

Selection of the most adapted varieties for the best benefit of all the actors



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