

# The Future of Zero Calorie Sweeteners and Innovation in the Food and Beverage Industry

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April 16, 2019



  
**PureCircle**  
Everything stevia

# Highly dynamic times for the global food & beverage industry

**Governments  
more engaged  
on health**

**40+**

Proposed/passed  
sugar taxes or  
nutritional label

**Health &  
Wellbeing is  
important**

**66%**

Of consumers are  
interested in buying  
products with 'natural' claim

**Sugar  
Under Fire**

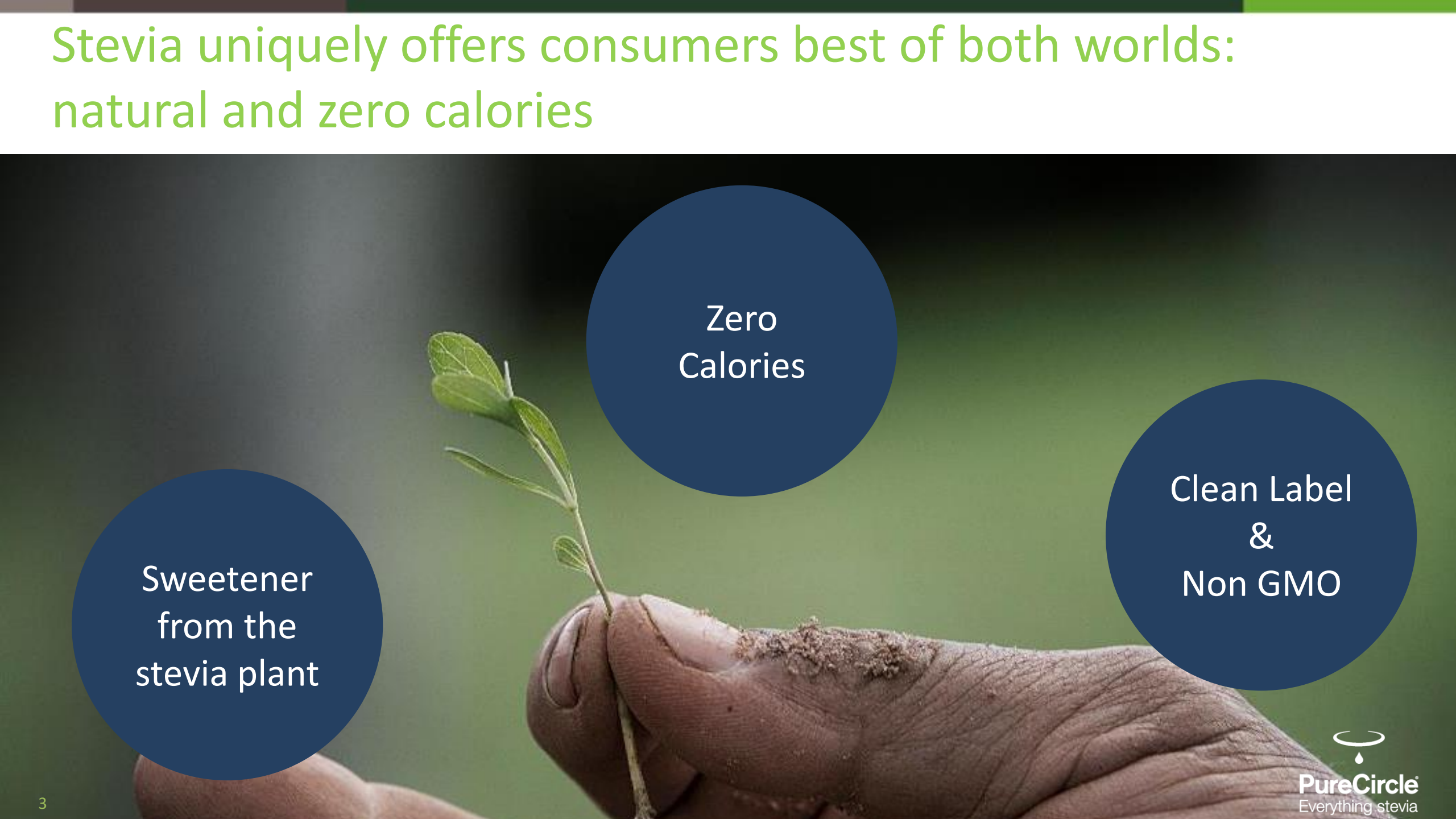
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Consumers are  
concerned with sugar  
related health issues

**Companies are looking for  
a new sweetener option**



# Stevia uniquely offers consumers best of both worlds: natural and zero calories



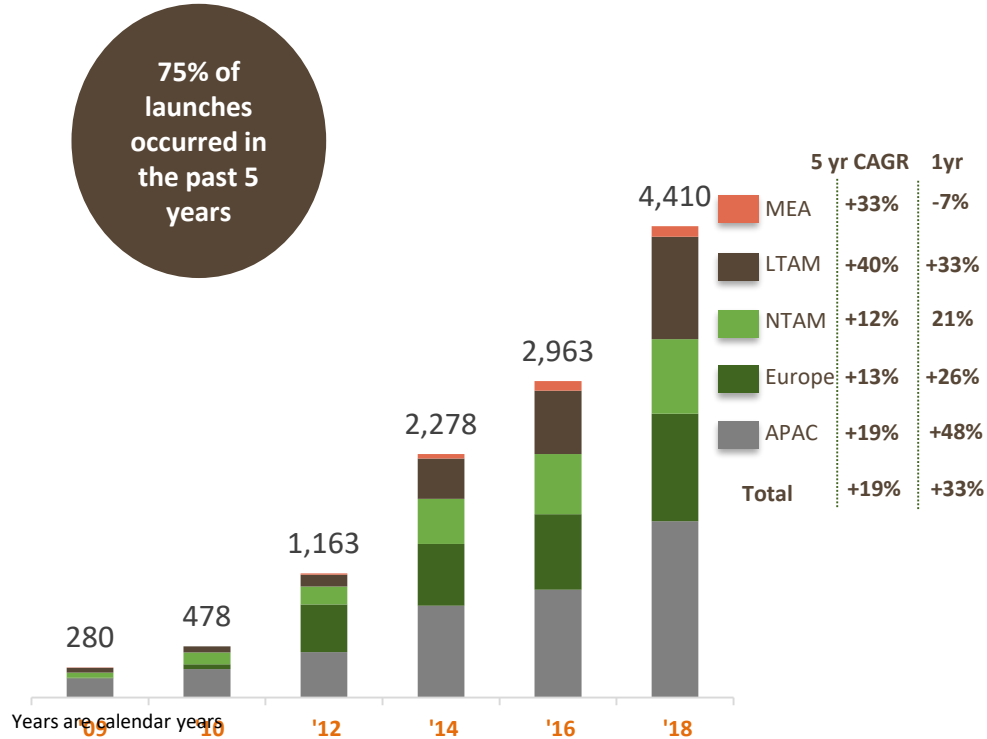
Sweetener  
from the  
stevia plant

Zero  
Calories

Clean Label  
&  
Non GMO

# Consumers are driving global demand for stevia

Global new product launches with stevia



Reb M Sweeteners are taking off in a range of categories



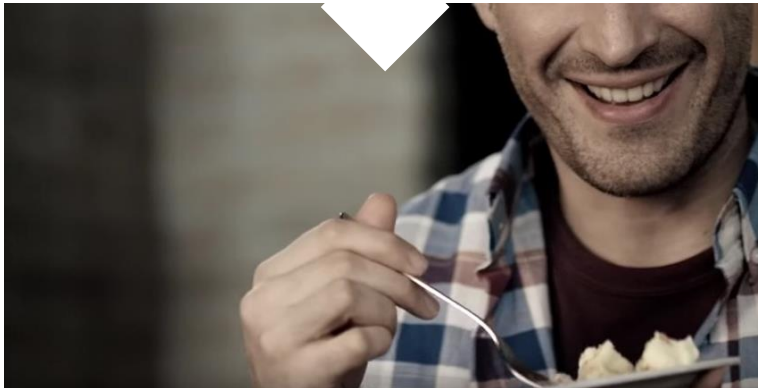
# Meet PureCircle

## Global Leader in Stevia Sweeteners & Taste Solutions

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### WHO WE ARE

World's Leading Producer &  
Innovator of Stevia  
Sweeteners



### OUR VISION

Our vision is to make stevia the zero-calorie natural mainstream sweetener for the beverage and food industries.





Taste gap existed with

early stevia products

REB A

**INTENSE**  
**LINGER**  
**BITTER**  
*sweet*  
**aftertaste**  
*metallic*  
**DELAYED ONSET**

# Our newest generation of stevia leaf sweeteners - the best tool for sugar reduction

**Great Taste + Natural + Zero Calories**



Unlike earlier generation,  
Reb M Sweeteners can deliver on:

**Clean Sugar Like Taste**

**Global Scale**

**Cost Effective**

**Non GMO & Clean Label**



From a range of options, we believe that Reb M sweeteners combines the best of consumer needs with customer requirements of price & capacity

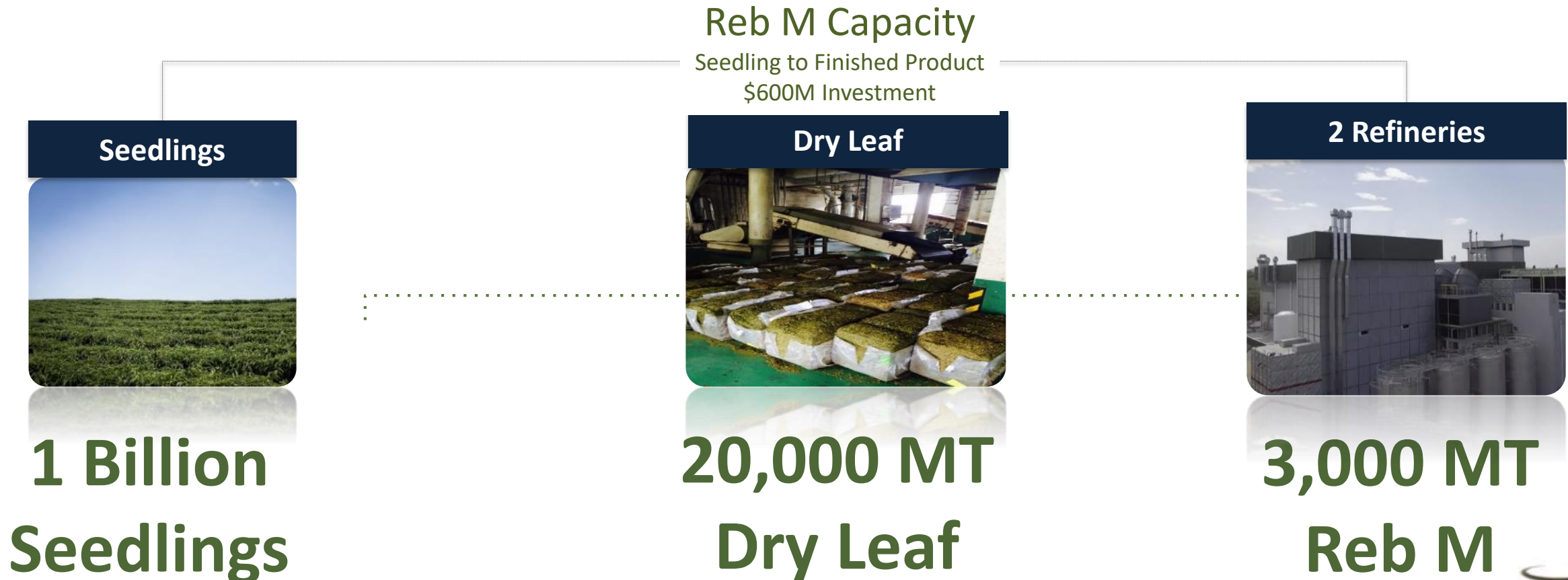
	Natural	Taste	Consumer Acceptance	Price	Regulatory Approval	Capacity
Reb M (bioconversion)	●	●	●	●	●	●
Reb M (extract)	●	●	●	●	●	●
Reb M (GMO/fermentation)	●	●	●	●	●	●
Reb A (extract)	●	●	●	●	●	●
Monk Fruit	●	●	●	●	●	●
Artificial Sweeteners	●	●	●	●	●	●
HCFS	●	●	●	●	●	●
Sugar	●	●	●	●	●	●



# Vertical integration and supply chain innovation means that we can scale these newest stevia leaf sweeteners

< 1yr ago : 300MT Reb M

**TODAY:** Scaled up leaf 10x to produce 3,000 MT Reb M



\* Reb M refers to extract and bioconversion process

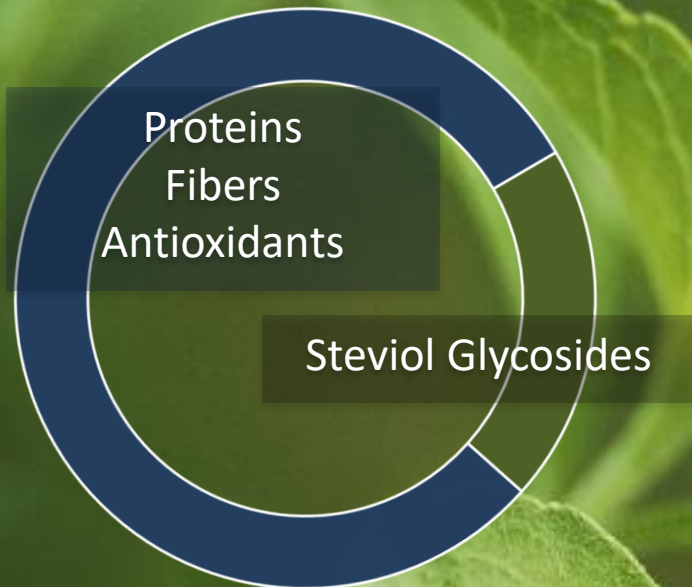
# Stevia Leaf – the Source of Innovation

Stevia Leaf Composition

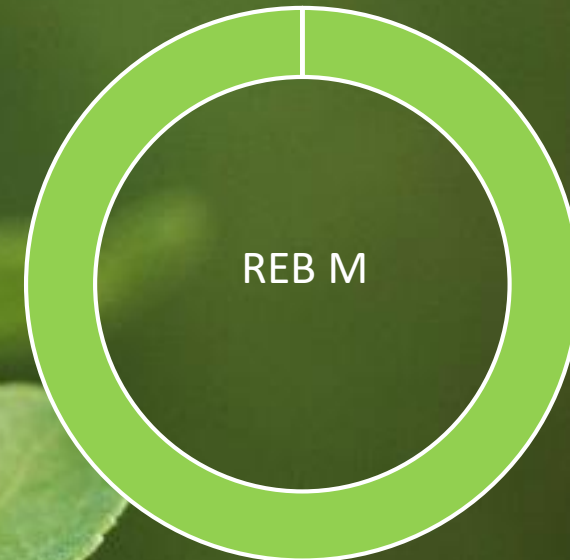
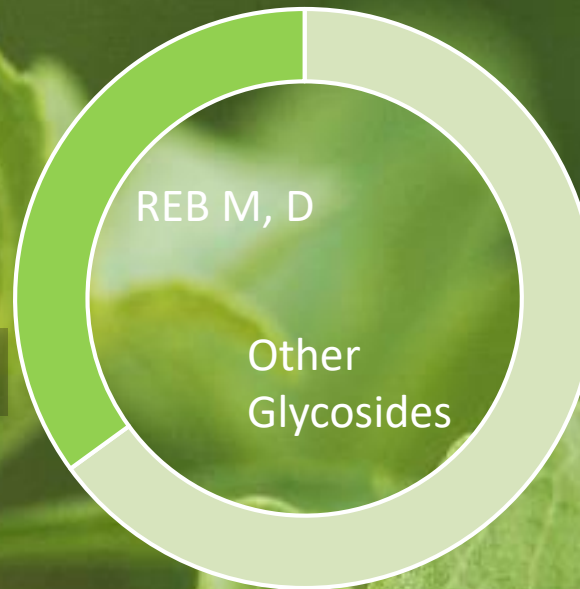


Getting to the Best Stevia Sweeteners

Original Strategy (Reb A)



New Strategy



# R&D investment into plant breeding and processing has led to advances in stevia

## Industry-Leading Infrastructure

## Historic Milestones Achieved

## Continuously Focused On Innovation



PureCircle has R&D centers located in the United States, China, Malaysia, Paraguay, Kenya and Zambia supporting leaf diversity.

In 2018 PureCircle grew new stevia plant varieties with **40X more** of the best tasting stevia leaf content (Reb M)

2019 PureCircle stevia innovation initiatives include:

1. Trial plantations of superior lines of stevia plants produced in 2018.
2. Traditional breeding of more than **30,000 unique lines** of stevia.
3. Identifying stevia genome loci for best tasting molecules
4. Improving superior cultivars' vigor and leaf yields
5. Developing stevia varieties with high seed-setting rates
6. Production of Reb M from Reb A



# Leveraging stevia to this scale has positive impact beyond calories



Using 3,000 MT of stevia could:

GLOBAL  
FARMERS



Support  
**30,000+**  
**Farmers**  
annually

LAND USE



Save  
**25,000+**  
**hectares**  
annually

CARBON  
FOOTPRINT



Reduce  
**600,000 MT**  
Of Green House  
Gasses

WATER  
FOOTPRINT



Save  
**1 Trillion**  
Liters of  
Water



# Ultimately, next generation stevia sweeteners can unlock brand growth

**Remove**

**2 Million**

MT Of Sugar  
At 15% sweetness levels

**Save**

**\$600 Million**

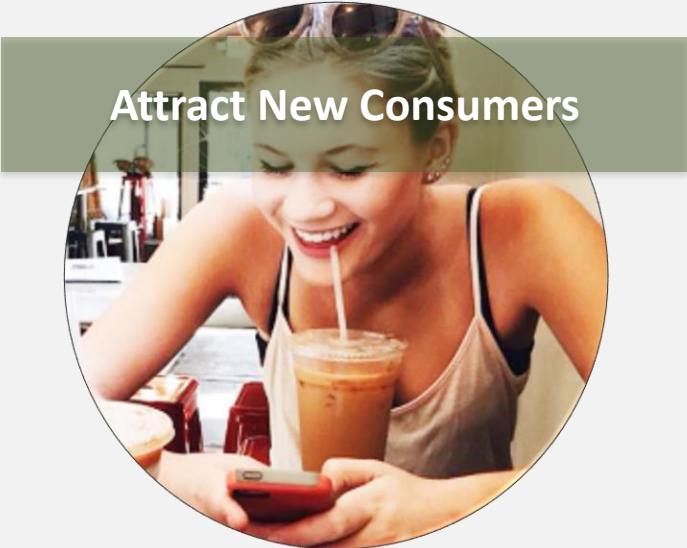
*From switching from sugar to stevia using 3,000 MT*

**Eliminate**

**7 Trillion**

Calories by replacing sugar with stevia across 3,000 MT

## Support Customers' Growth Strategies



# Thank you

