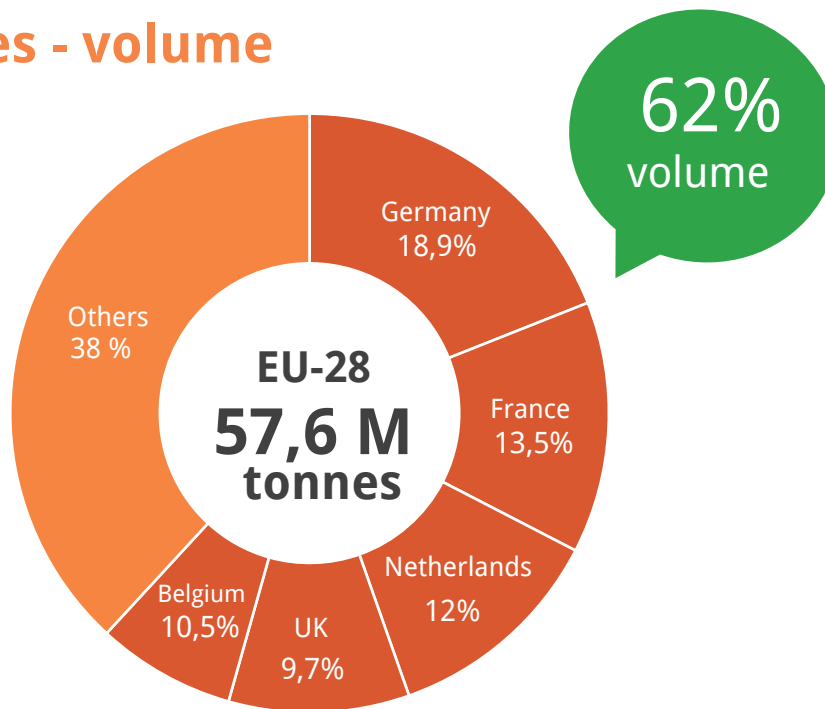




1. CURRENT SITUATION OF THE EUROPEAN POTATO MARKET

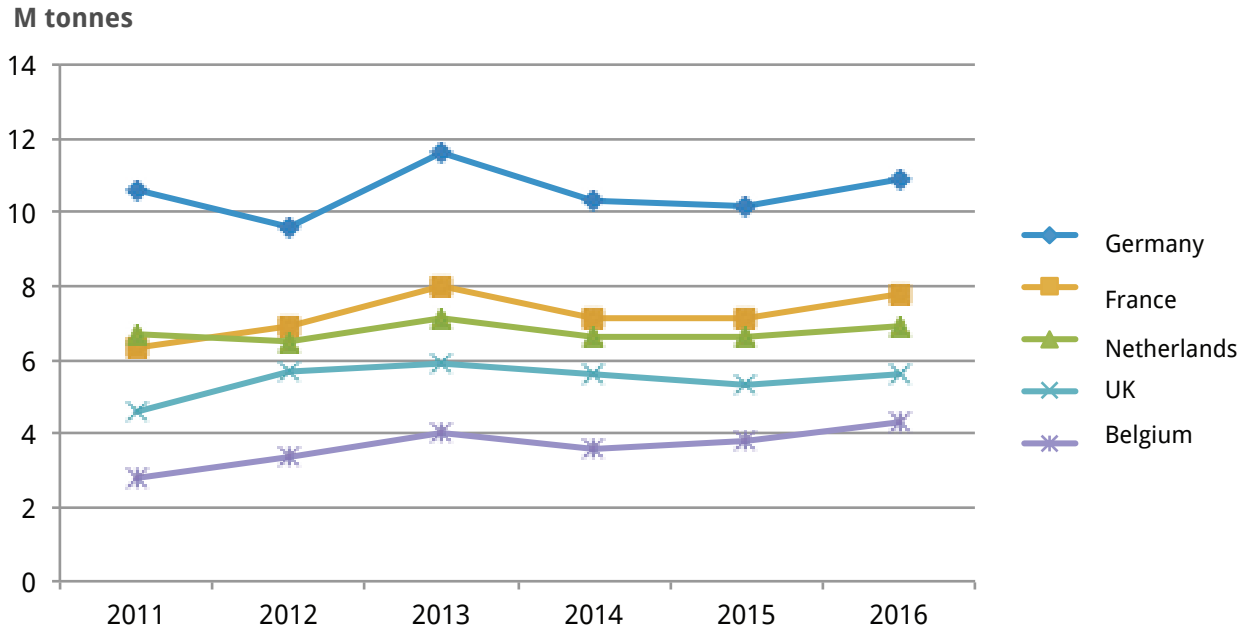
Production distribution in EU countries - volume



Potato production in EU.
Source: Potato Market and Trade Review 2017. Data 2016

Production evolution

Overall increase of the production in 2016,
but not reaching the 2013 levels



Production of the main producer countries in UE (million tons). Source: Potato Market and Trade Review 2017

Export trade

Exports have increased significantly in value and have decreased slightly in volume during 2016

2.845.149 tonnes

-1% s/2015

1,9 billions €

+11% s/2015

A decorative background element on the left side of the slide. It features a light gray, stylized cloud-like shape with a central yellow circle containing a gray sun-like symbol with eight rays.

2. AGROMAR SITUATION VS EU MARKET

The current situation of Agromar

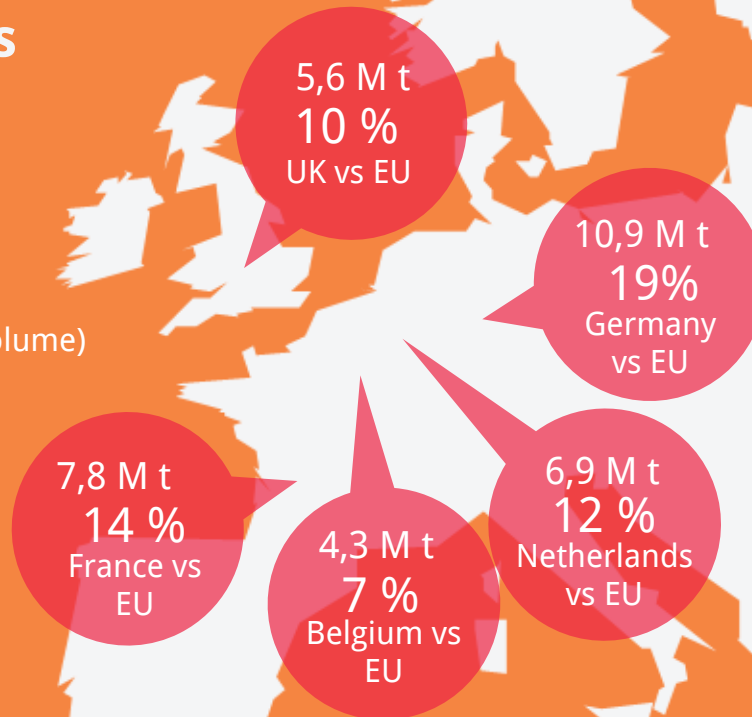
52.500 t
16,6 M €



€

Situation of the target markets

France
Germany
Uk
Netherlands
Belgium
62 % of the EU market (volume)
= 35,5 million tonnes



Agromar vs target markets



52.500 t
0,7 % of
the French
market

5.6 M t
10 %
UK vs EU

10.9 M t
19%
Germany vs
EU

7.8 M t
14 %
France vs EU

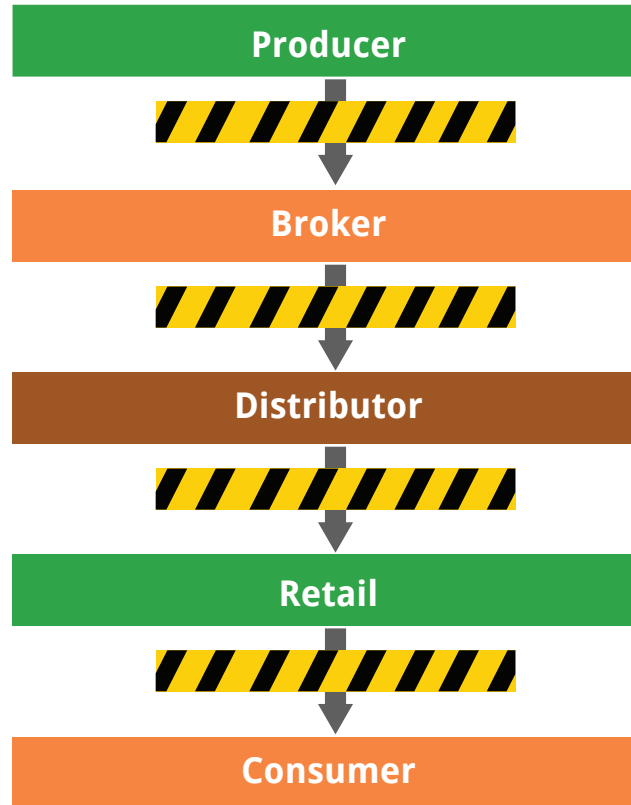
4.3 M t
7 %
Belgium vs
EU

6.9 M t
12 %
Netherlands
vs EU

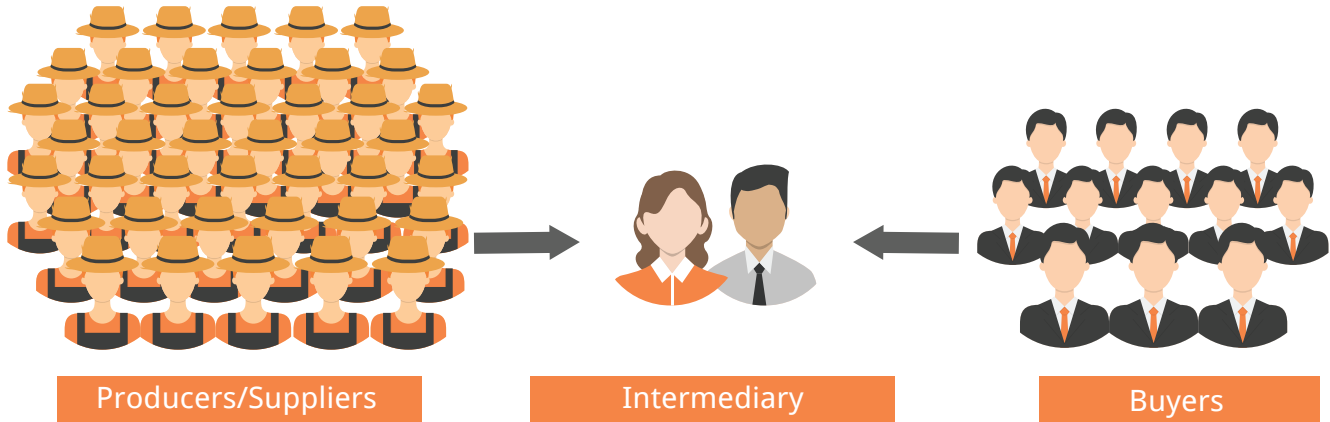


3. PROBLEMS OF THE POTATO SECTOR - OPPORTUNITY

Barriers on the trade flow



Highly fragmented sector. Limited access to the information about producers/suppliers and buyers. The intermediary is between them.

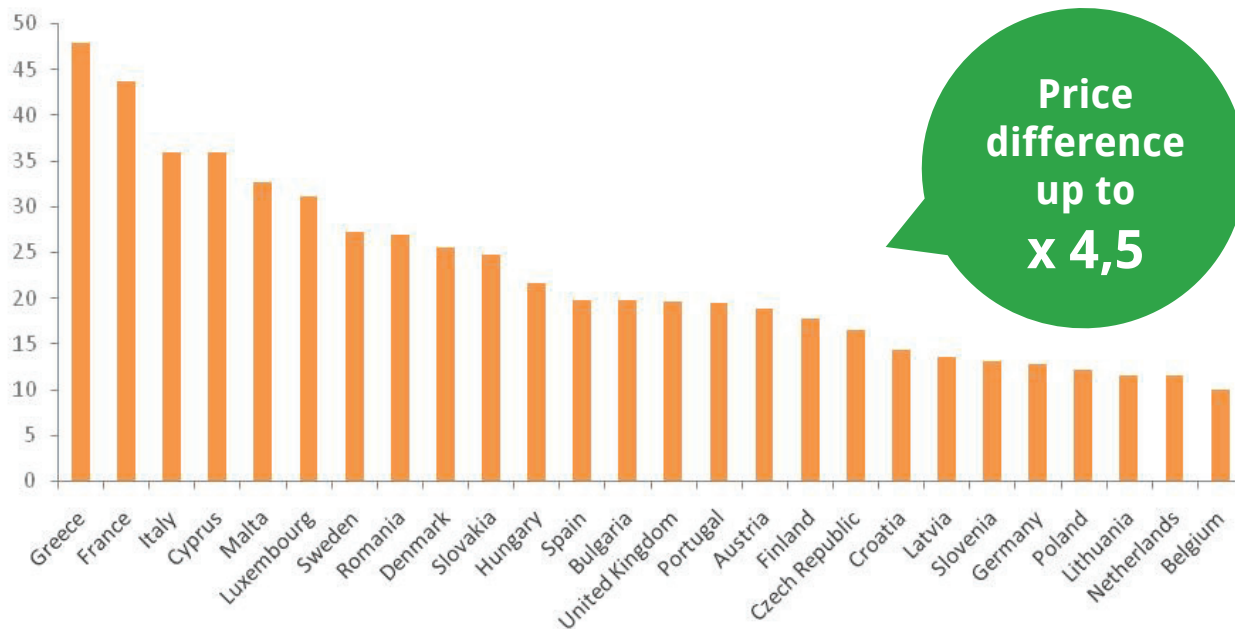


Potato prices vary a lot depending on time, countries and potato varieties

	Main crop potatoes			Early potatoes			Seed potatoes		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
Belgium	14.8	2.7	10.0	27.3	5.1	12.9	.	.	.
Bulgaria	23.9	20.4	19.8	.	.	.	.	.	.
Czech Republic	22.4	17.7	16.6	31.7	21.4	25.3	25.4	28.8	23.9
Denmark	23.0	24.1	25.6	.	.	.	28.2	28.2	23.0
Germany	24.7	15.4	12.8	52.0	18.0	.	.	.	.
Estonia	.	.	.	.	.	.	.	.	.
Ireland	.	.	.	.	.	.	.	.	.
Greece	53.8	44.8	47.9	57.9	46.5	49.2	29.0	26.4	24.1
Spain	33.9	11.2	19.8	60.4	27.3	35.4	.	.	.
France	67.1	36.7	43.7	141.0	.	139.6	43.1	47.3	38.3
Croatia	22.4	15.5	14.4	42.4	22.6	30.4	64.1	59.6	62.7
Italy	47.3	37.1	35.9	.	.	.	.	.	.
Cyprus	28.8	25.7	.	.	.	.	67.7	64.5	.
Latvia	15.8	15.9	13.6	20.2	27.7	23.8	26.2	29.2	26.6
Lithuania	17.2	15.4	11.5	21.4	21.0	23.5	.	.	.
Luxembourg	38.1	20.8	31.2	.	.	.	17.8	13.1	13.1
Hungary	27.1	19.3	21.6	34.2	23.0	29.9	88.6	.	.
Malta	36.5	28.3	32.7	.	.	.	.	.	.
Netherlands	19.6	10.2	11.5	.	21.1	38.7	27.6	27.9	24.6
Austria	25.6	12.3	18.9	30.6	15.7	22.8	.	.	.
Poland	15.4	12.4	12.2	12.8	10.8	11.8	22.8	25.5	23.0
Portugal	32.8	15.2	18.6	54.0	26.4	28.1	.	.	.
Romania	40.1	34.4	27.0	33.9	25.2	25.0	.	.	.
Slovenia	32.7	16.5	13.1	53.8	28.8	31.6	46.7	.	.
Slovakia	26.1	26.8	24.7	36.9	29.8	32.1	.	.	.
Finland	23.8	14.6	17.7	36.3	45.9	46.2	.	.	.
Sweden	32.5	26.6	27.2	41.4	33.5	35.6	.	.	.
United Kingdom	25.0	17.8	19.6	45.2	38.7	63.6	.	.	.

(.) data not available

Annual agricultural selling prices for potatoes - absolute prices (years 2013 -2014 -2015) (EUR 100 Kg). Source Eurostat. Data 2015



Annual agricultural selling producer prices of main crop potatoes - absolute prices 2015 (EUR 100 Kg). Source: Eurostat. Data 2015

Trade opacity \neq Product traceability



“No one knows where to find potatoes during harvesting season”

**THERE IS NOT A
REAL FREE MARKET**

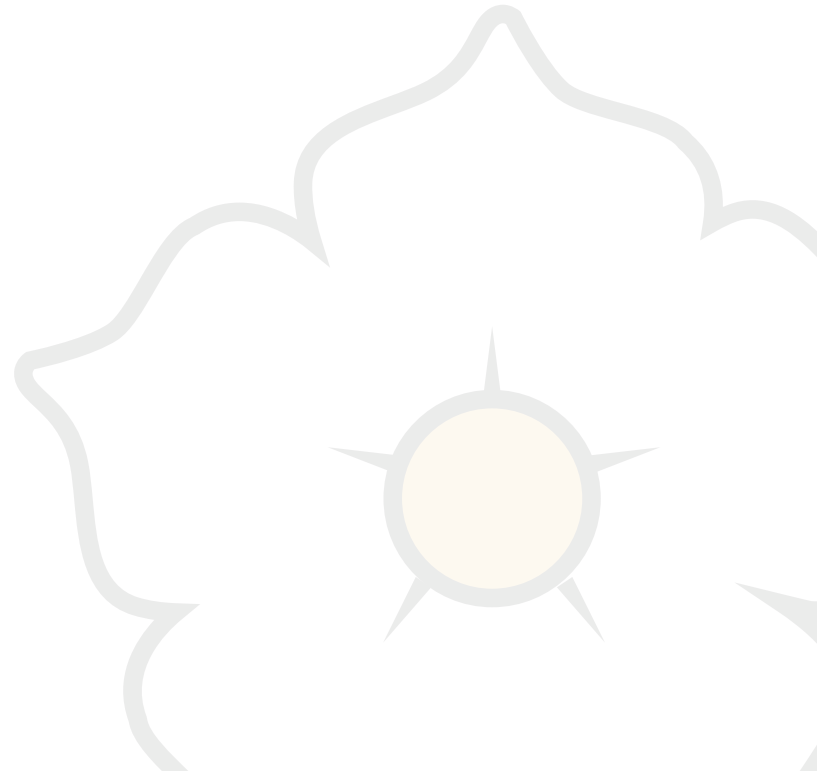
Lack of
transparency

Limited
bargaining
power

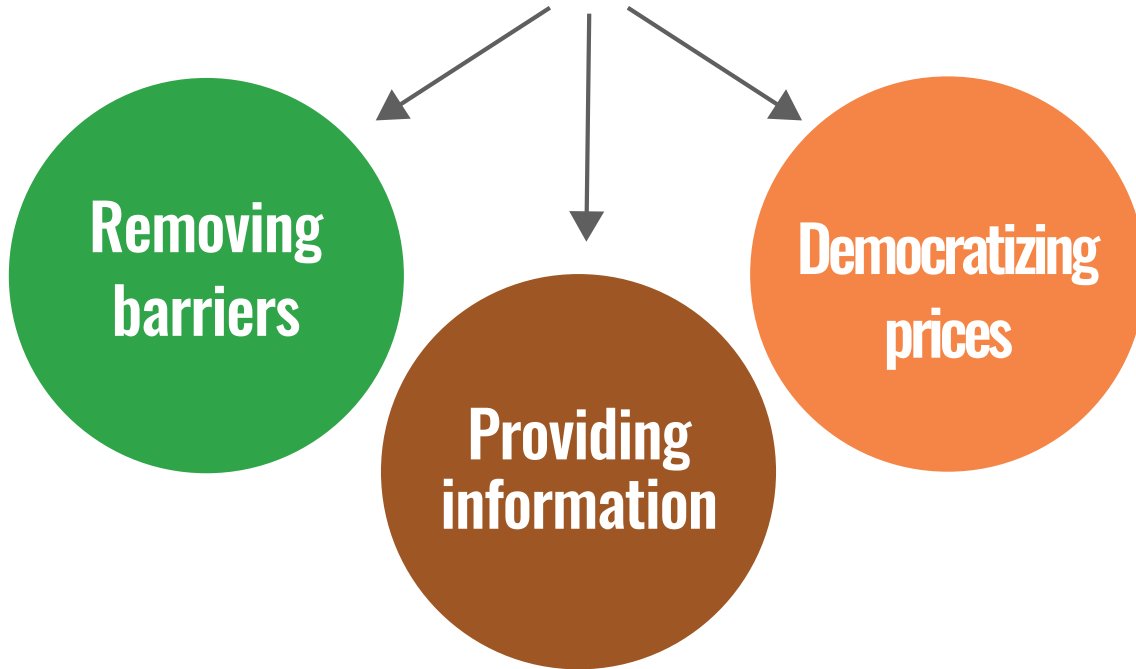
Lack of
information



4. OBJECTIVE



Building a new trade model based on
TRANSPARENCY



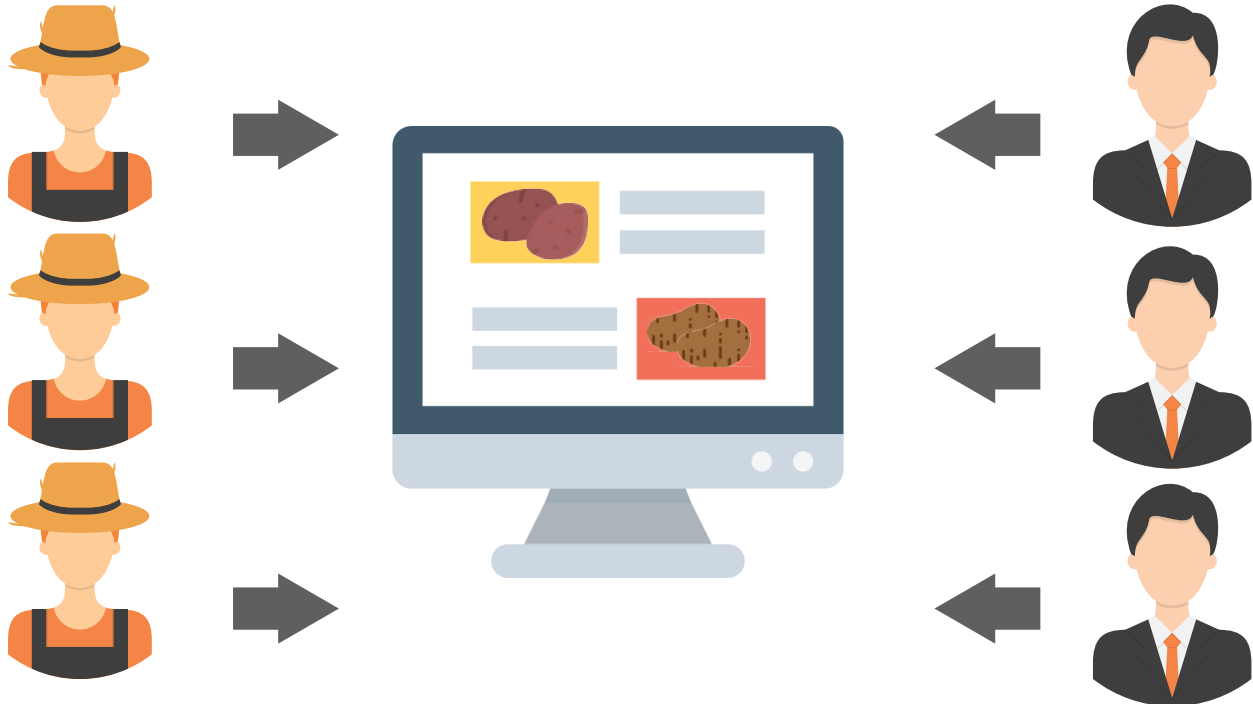
Removing barriers

Reaching a greater number of producers and buyers

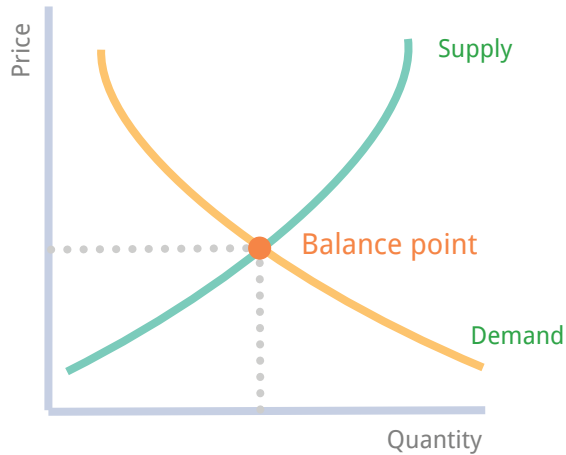


Providing information

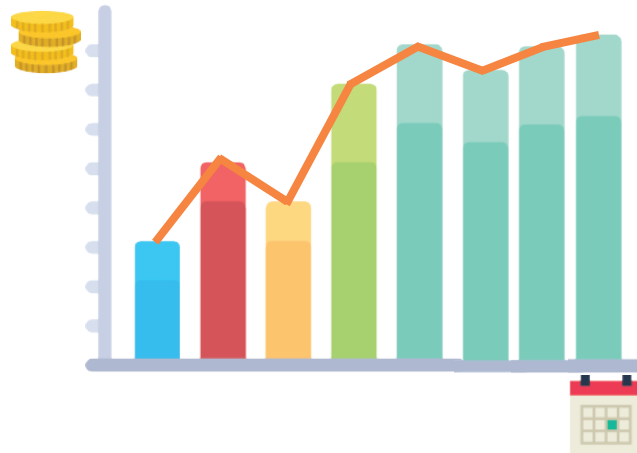
Updated and direct information about supply and demand



Democratizing prices



Supply and demand meet at Potato Market. Prices are fixed within a transparent market



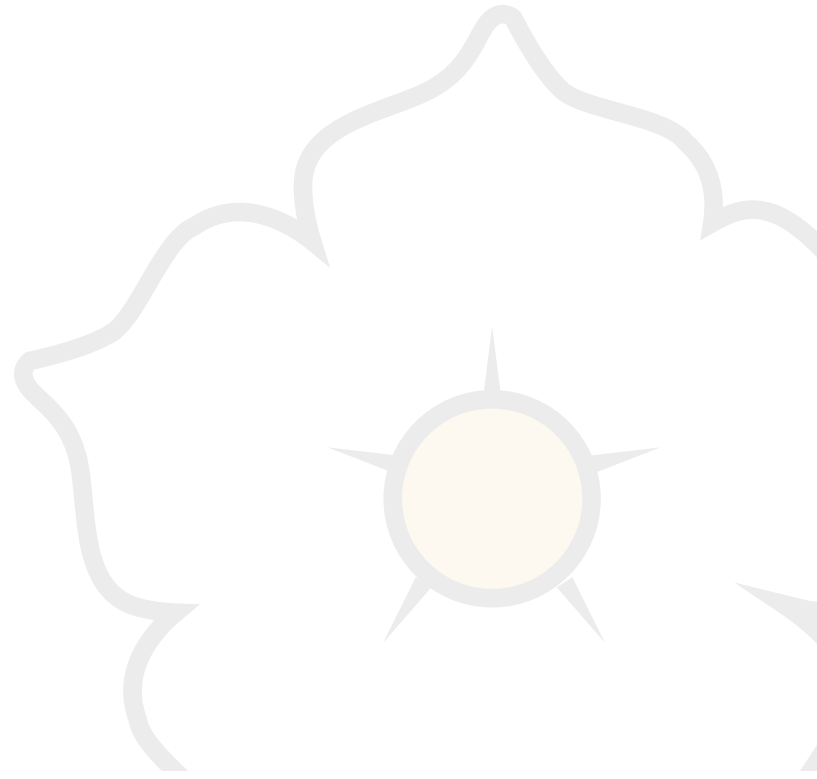
Prices are known. Fluctuation is reduced and the market is harmonised

How?

Easily with the PotatoMarket online platform



5. WHAT IS POTATOMARKET?



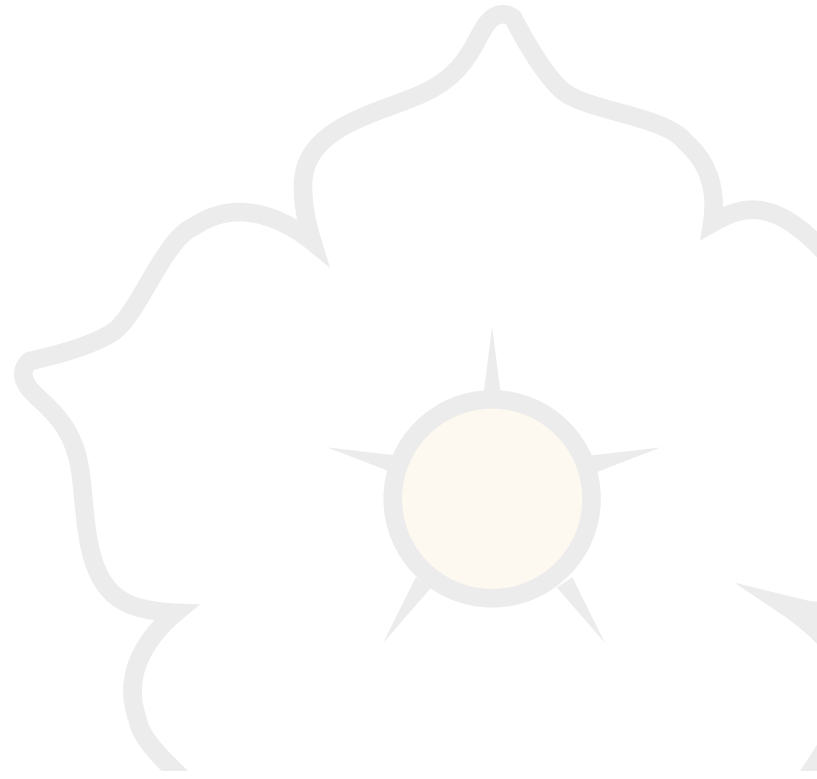


The **first online potato market** for producers and buyers

Bring together producers/suppliers and buyers all on one seamless platform,
expanding the trade network on a **transparent, easy to use, fast and reliable** way

Offer what you have and find what you need

6. TARGET CUSTOMER



User profile of the platform



PRODUCER/SUPPLIER

Farmers/producers,
farmers associations,
cooperatives, brokers

France
Germany
UK
Belgium
Netherlands



BUYER

Distributors, wholesalers,
packers, retailers,
food industry

Europe
Middle East
North Africa

7. BENEFITS OF USING POTATOMARKET





Transparency



Variety of potatoes



Competitive prices



Best deals



Online gathering



Wide business
network



Fast and easy



Availability



Accessibility
and convenience



Updated
information



Reliability



Reviews



Financing



Assurance

Transparency



Known price

Known fee

Known origin

Proven quality

Variety of potatoes



A wide range of potatoes
and varieties

Different origins

Different types of packaging

Competitive prices



Known prices

Prices and market are self-regulated

Best deals



More offers

The information is known
(product and price)

Comparing for the best price
and quality

Online gathering

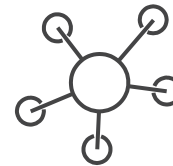


All the information is gathered in the same place

Compare products and prices

Reduce search time and save money

Wide business network



Easier access to a wide range of products and offers

Easier access to buyers and demand network

Fast and easy



Digital tool easy to use

Quick access from any device

Easy and fast commercial
management, reducing
procedures

Availability

24/7

Unlimited access, 365 days
a year

Do not depend on
opening hours

Accessibility and convenience

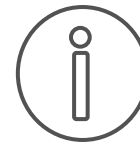


From anywhere

Without having to travel/move

Saving time and money

Updated information



Supplies on a real-time basis

Known prices

Real market demand

Reliability



Eurocelp quality analysis system

Only users analysed and validated
by PotatoMarket

Secure collection

Reviews



Grade system created by the
users themselves

Word-of-mouth (reviews) is
the most valuable method for
buyers

Finance



Ease of payment

Agreement with a partner bank

We negotiate for you with
the bank

Better financing terms

Assurance



Secure the collection with an
insurance company

Ensure quality of the purchased
goods with Eurocep analysis



8. SOLUTIONS FOR PRODUCERS AND BUYERS

Producer



PROBLEMS

- Access to a few buyers
- Lack of market information
- Price does not correspond to real supply and demand
- Producing stock intuitively
- Uncertainty of collection

SOLUTIONS

- Access to a wide buyer network
- Information about competitors and demand
- Fixing the right price
- Improving the stock management
- Secure collection

Buyer



PROBLEMS

Lack of information about product availability

Do not find the potato variety

Lack of market information

Limited to the products offered
by the intermediary

Unknown starting product price

Product quality analysis

SOLUTIONS

Be aware of the real product availability

Find the required product at the best price

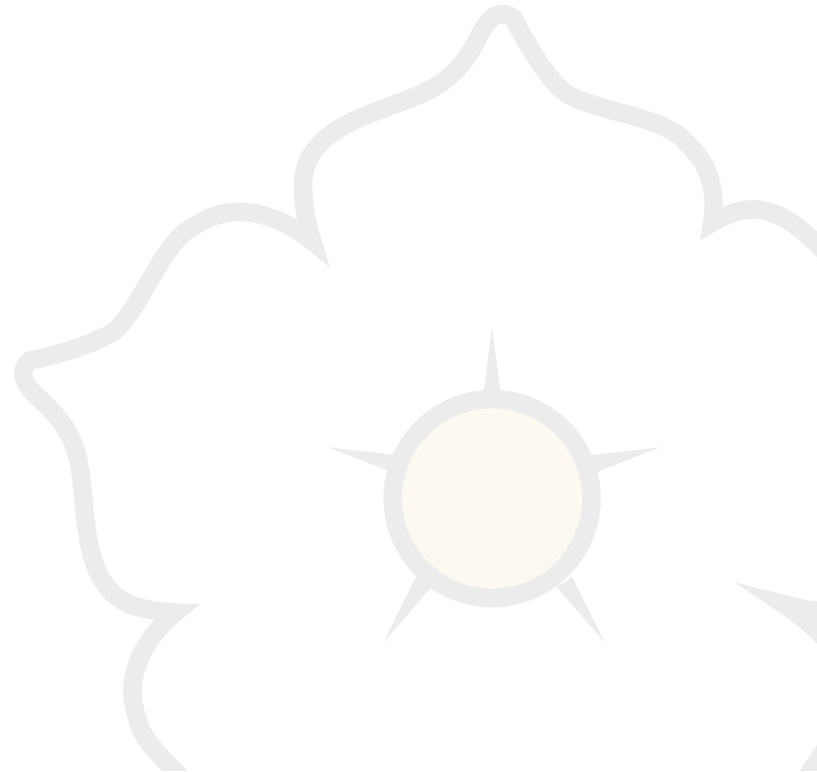
Updated market information

Do not rely on a limited number
of intermediaries

Known fee

Ensure product quality

9. OFFERED PRODUCT



Potatoes

Seed potato



Ware potato



For industry



Organic potato



Chef potato



Eurocelp quality analysis

The ones offered by the producers



Agata



Agria



Annabelle



Asterix



Bintje



Caesar



Canberra



Cecile



Chopin



Colomba



Liberta



Marabel



Monalisa



Mozart



Sunita



Packaging

In bulk



Big bag



Crate



Packed



Packaging:Packed

Process

Washed



Unwashed



Broshed



Container

Bag



2,5 kg, 3 kg, 5 kg, 10 kg,
15 kg, 20 kg and 25 kg.

Carton box

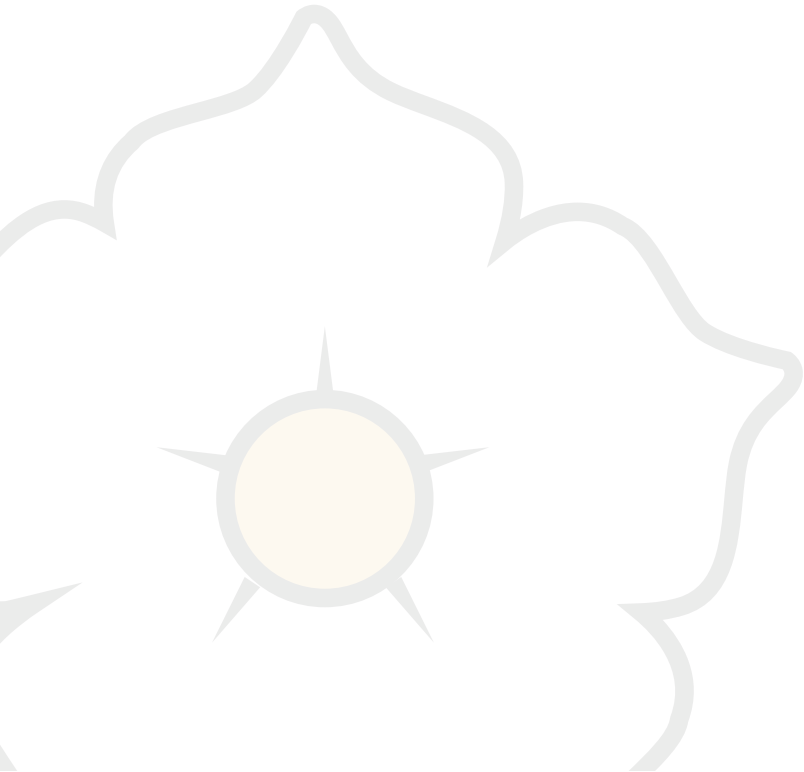


5 kg, 10 kg and 12 kg.

Wooden box



5 kg, 10 kg and 12 kg.



10. HOW POTATOMARKET WORKS?

Register procedure on the platform

1

**PRODUCER OR BUYER
REGISTER REQUEST**

Agreement to the terms of use

2

**BANK CARD
DETAILS
FEE PAYMENT**

(3 months free trial)

3

**POTATO MARKET ANALYZES
AND VALIDATES THE USER
PROFILE WITHIN 4 DAYS**

Buyer:

Rating by the insurance company
and the bank

Producer:

Verification protocol (VAT identification
number and contact details)

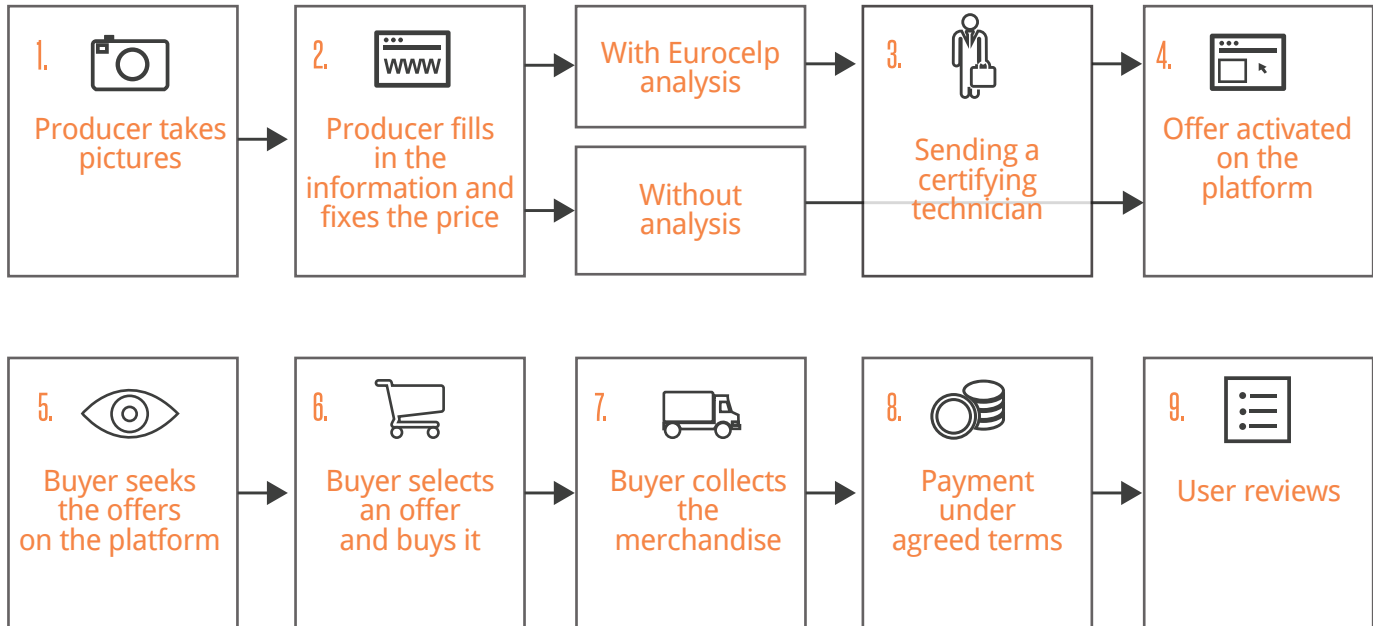
4

USER CODE ASSIGNMENT

User is activated on
the platform

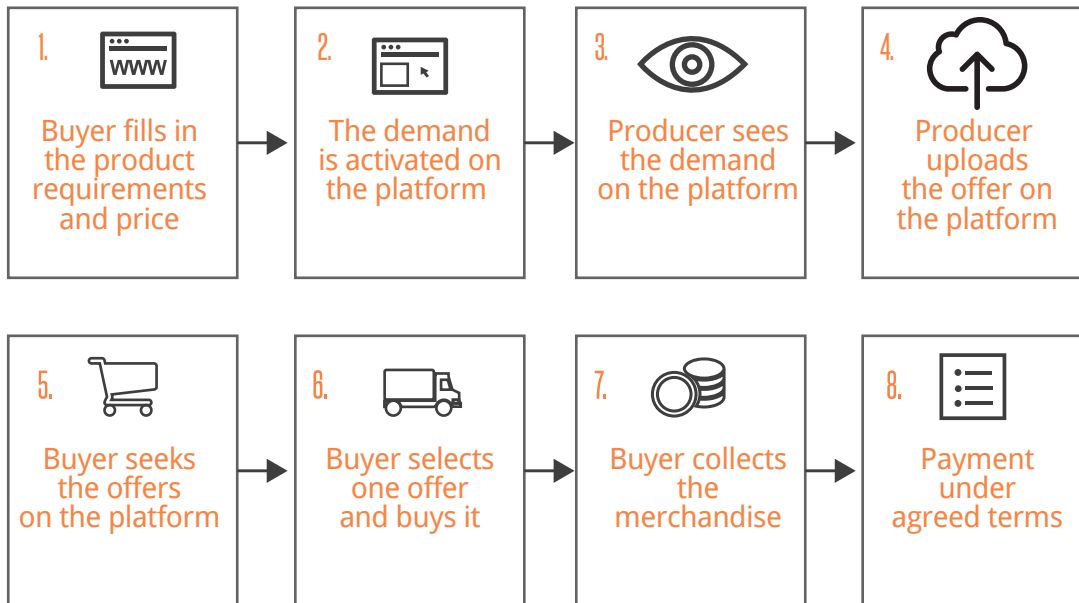
Common process

Producer offer-buy the product



Alternative

Buyer demands the product



A stylized graphic on the left side of the slide. It features a light gray cloud-like shape with a yellow sun in the center. The sun has a circular face and several pointed rays extending outwards.

11. EUROCELP QUALITY ANALYSIS

What is Eurocelp analysis?



Laboratory of potato quality analysis

Quick product quality rating system

How does Eurocelp work?

SAMPLE INFORMATION

Client EUROCELP
 Producer Demo file
 Variety Agata
 Plot Behind the farm
 Client lot ref. lot 001
 Sample ref. 4 samplings upper palet

Unwashed sample poids 15.26 kg
 Ground (not significant) 1,53 %
 Expert remarks

EXTERNAL DEFECTS

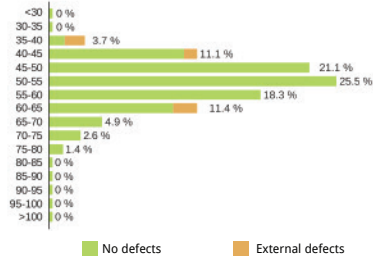
SERIOUS LIGHT

EXTERNAL DEFECTS	SERIOUS	LIGHT
Green	2 %	3 %
Damaged - rotted	2 %	5 %
Deformed	1 %	3 %
Others	1 %	
Total	6 %	11 %
Expert remarks		

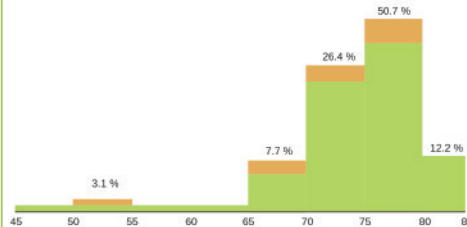
SERIOUS INTERNAL DEFECTS

Total 10 %
 Sample / ss sample / defects 84 / 40 / 4 PDT
 Expert remarks
 Internal blows/ Worms

CALIBERS



QUALITY PRESENTATION



Camera average grade 75.36
 Expert grade 75
 Expert remarks
 Marks / Little blows/ Black spots

Dry matter 18.4 %

A technician visits the producer facilities

Takes a random sample from the product

Analyzes the sample

Draws up a report

Certifies the product

Who is the Eurocelp analysis for?

**Analyze is not mandatory,
but recommended**

Analyze is required

For a beginner user that performs the first supplies

Analyze is not required

For a producer/supplier with 60 deals completed successfully (endorsed by the reviews written by the users)

Advantages of being analysed



Tranquillity and security for the buyer

Certainty that the purchased product and the received product are the same

Reduction of the return rate

Avoiding incidents

Advantage over other unanalysed products

12. PRODUCT REGISTRATION PROCEDURE



Product registration procedure

1

*PRODUCER USER
REGISTRATION

2

*POTATO MARKET
SENDS RULER &
INSTRUCTIONS IN 24 H

(email & post mail)

3

PRODUCER TAKES
THE PICTURES

(according to
instructions)

4

PRODUCER FILLS IN
THE PRODUCT DETAILS
AND UPLOAD THE
PICTURES

5

PRODUCER FIXES
THE OFFER PRICE

6

PRODUCER UPLOADS
THE OFFER
ON THE PLATFORM

7

POTATO MARKET
CHECKS THE OFFER
AND VALIDATES IT

8

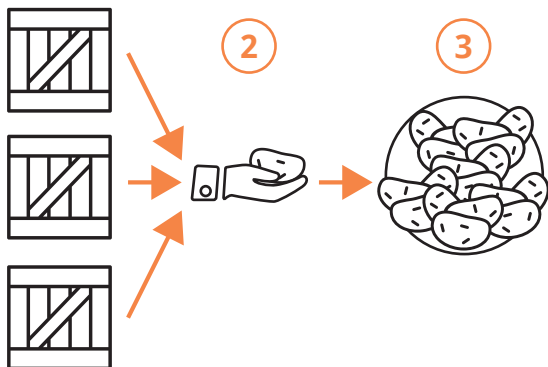
OFFER IS ACTIVATED
ON THE PLATFORM

*Only the first time

Photographic instructions

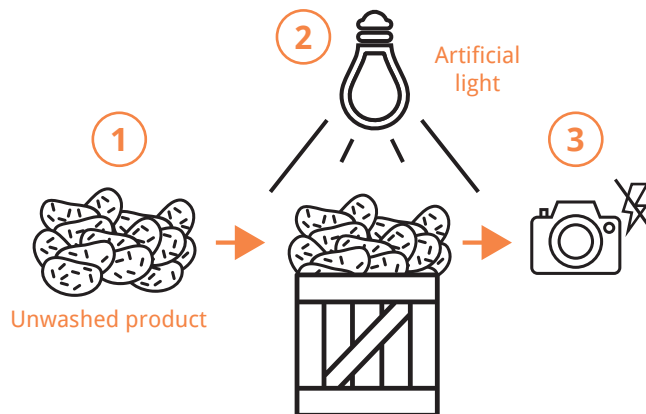
1. Product selection

Take a random sample of 50 potatoes from the stock or directly from the crop field



2. Photograph no. 1: unwashed product

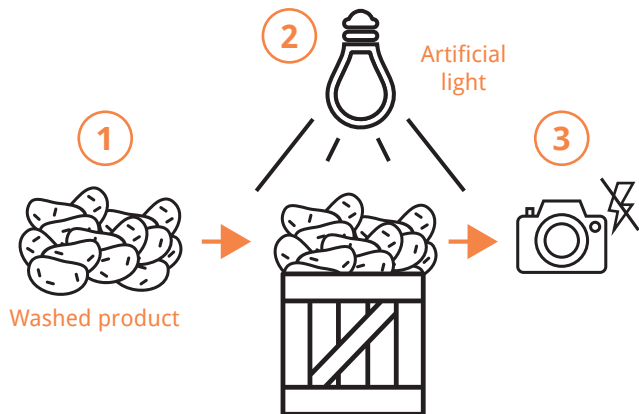
Place the 50 unwashed potatoes in a 40x60 cm box under an artificial light
Place the ruler close to the potatoes and take a picture without flash



3. Photograph no. 2: washed product

Place the same 50 washed potatoes
in a 40x60 cm box under
artificial light

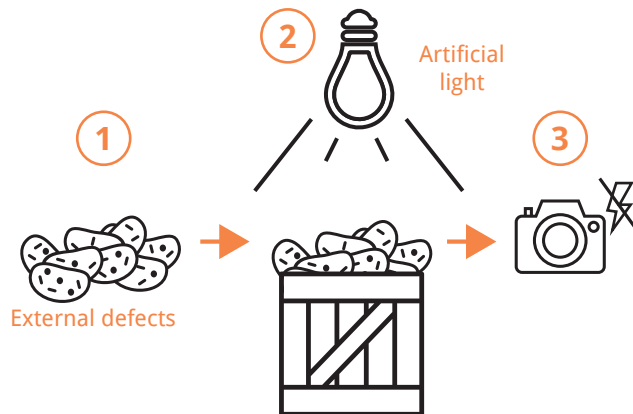
Place the ruler close to the potatoes
and take a picture without flash



4. Photograph no. 3: external defects

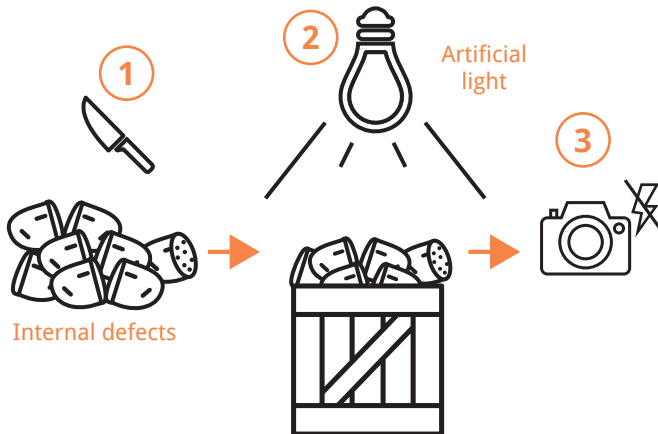
Select the potatoes with external defects
and place them in a 40x60 cm box under
artificial light

Place the ruler close to the potatoes and
take a picture without flash
Fill the number in the form to obtain the
percentage



5. Photograph no. 4: internal defects

Select 3 big potatoes and cut them in half
Pick 10 random potatoes and peel the tips twice
Place in the box the ones with internal defects
and place the ruler close to the potatoes
Take a picture without flash
Fill the number in the form to obtain the percentage

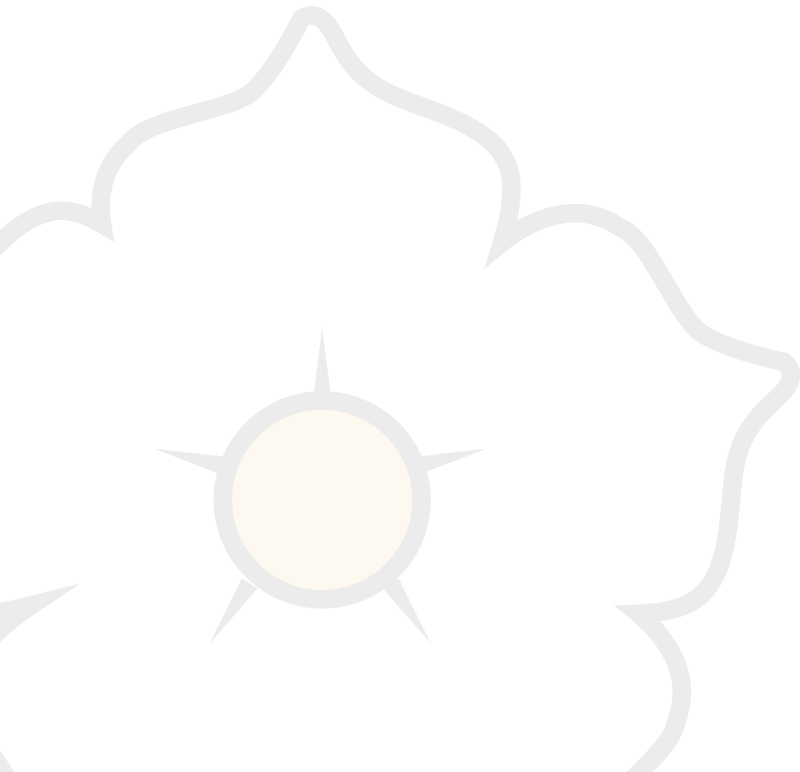


1. Unwashed product photograph

2. Washed product photograph

3. External defects photograph

4. Internal defects photograph



13. USER RATING SYSTEM

User rating



Reviews



Stars

Good practice is checked by the users themselves

People trust rating systems

It is not mandatory

Reviewing improves image and positioning

It is one of the criteria to get premium account paying as standard account

Reviews

(not mandatory)



Once the process is completed
(merchandise delivery and payment)

Users receive a notification asking for a review
(mail, SMS, platform client area)

Users write a review
(500 words)

Comments are posted in buyer and seller profiles

Stars

(not mandatory)

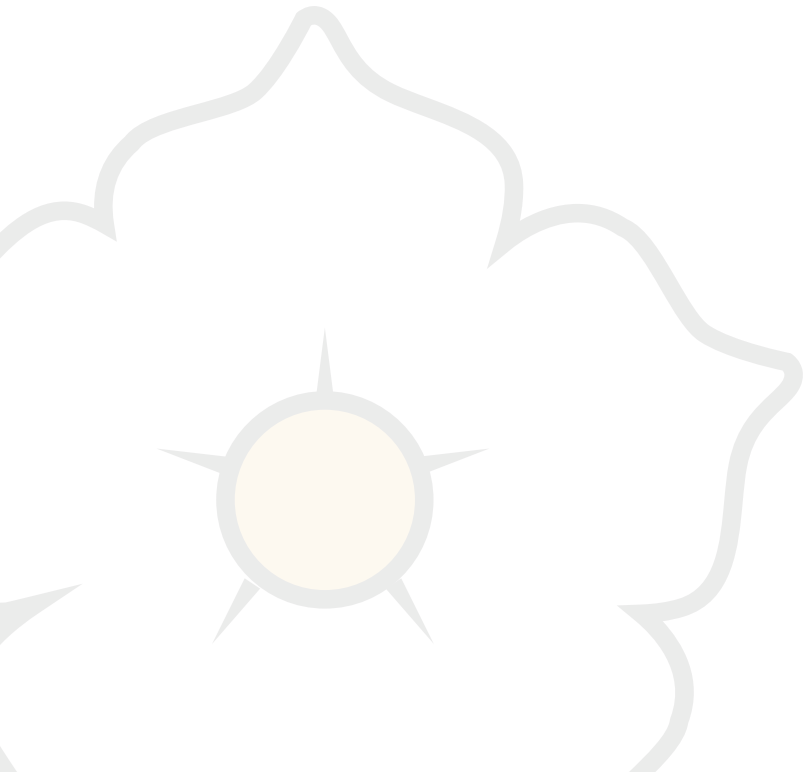


Once the process is completed
(merchandise delivery and payment)

Users receive a notification asking for a review
(mail, SMS, platform client area)

There are different parameters to grade with stars
(1 to 5 stars)

Evaluation system available on the product offered by the seller



14. SERVICES PROVIDED

Services provided



**Supply and
demand searcher**



User rating system



**We find what
you need**



Notification system



**Personal
assistance**



Statistical tool



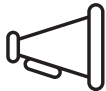
**Potato market
information**



User profile



**Multilingual customer
service**



**Advertising and
media visibility**



**Eurocelp quality
analysis**



Transport

Supply and demand searcher



Marketing tool with updated information about supply (producers) and demand (buyers), all gathered in the same place

Searching by filters

Find the best product at the best price

Establish business relationships

Find new business opportunities safely

User rating system



Auto-control system generated by user reviews

Buyers rate sellers after every deal

We find what you need



Service by mail and phone

If a buyer can not find the product he is looking for, PotatoMarket will look for it or find a similar one

If a seller can not find a buyer for his product, PotatoMarket will contact buyers looking for that product or a similar one

Notification system



PotatoMarket will send email or text notifications for:

Repeated purchase
offers based on purchasing
history: variety, price, producer,
etc.

New products
Products according to requirements

Personal assistance



By mail or phone

Information about payment methods,
delivery services, product, etc.

Problem solving

Technical support for the platform use

Tutorial about how to use
PotatoMarket platform

Statistical tool



Knowledge of the evolution of
your sales and purchases,
prices history, etc.

Comparison with the rest of
the sector by different criteria
(geographical zones, seasons,
varieties, etc.)

Standard account

Premium account

Market information



Related news, advices and reports.

Newsletter

Blog

Social media

YouTube channel

User profile

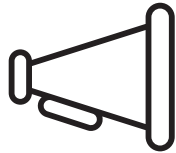


Profile management by including relevant information to boost sales

Personal data will not be included in the public profile (name, phone number, email, address, etc.)

Contains the reviews

Advertising & media visibility



Strong commitment to communication

Online and offline campaigns

High visibility in the specialized media

Attendance at international fairs

Strong activity in Social media
(Facebook, Twitter, YouTube,
LinkedIn)

Multilingual customer service



Language cannot be a barrier for doing business

English, Spanish and French service

Other languages will be included when required

Eurocelp analysis



The possibility to analyze
the product

Benefit from reduced rates

Get a better search positioning
for your offer

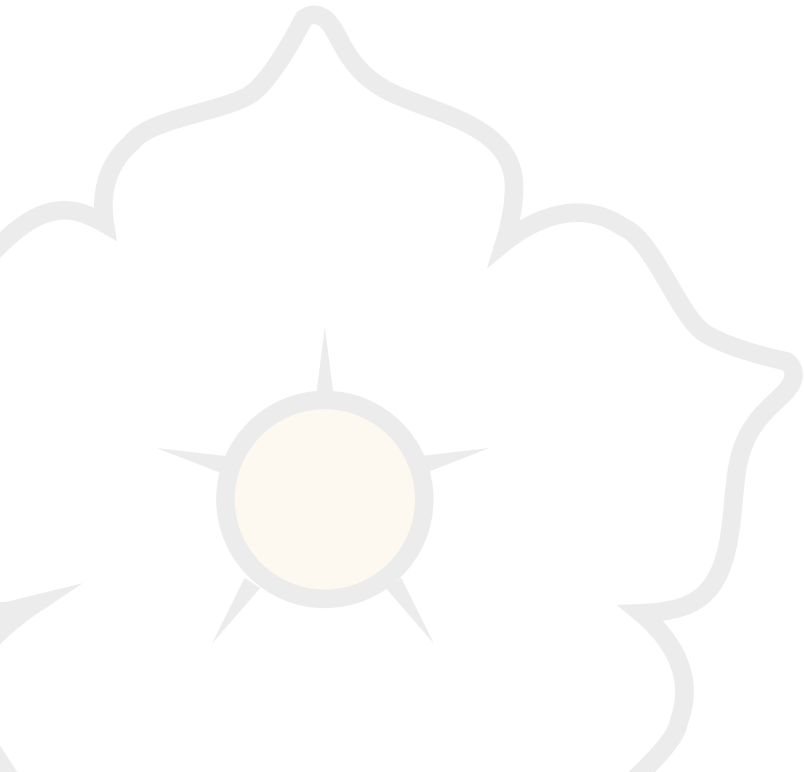
Transport



List of partner transport companies




Buyers can choose one
of these companies

Direct communication between the
buyer and the transport company



15. DIFFERENT ACCOUNTS

Accounts

	 Standard	 ★ Premium	 ★ Premium
Supply in top positions	No	Yes	—
Personnal assistance	Yes	Yes	Yes
Potato Industry information	Yes	Yes	Yes
Eurocelp quality analysis	Yes	Yes	Yes
COFACE	Yes	Yes	Yes
Preference in offer alerts	No	—	Yes
Preference in demand alerts	No	Yes	—
White list	No	Yes	Yes
Trading statistics	No	Yes	Yes
Supply and demand promotion	No	Yes	Yes
	8€ month Billed yearly 99€*	16€ month Billed yearly 199€*	16€ month Billed yearly 199€*

*Enjoy a 3 month free trial when you sign up

** Potato Market offers free shipping of a EUROCELP technician

Premium account



Advantages

White list

Priority in receiving notifications

First positions in the “recommended”
search filter

Advanced statistical tools

Offer promotion



Advantages

White list

First positions in the “recommended”
search filter

Advanced statistical tools

Demand promotion

How to get a premium account?

Free of charge

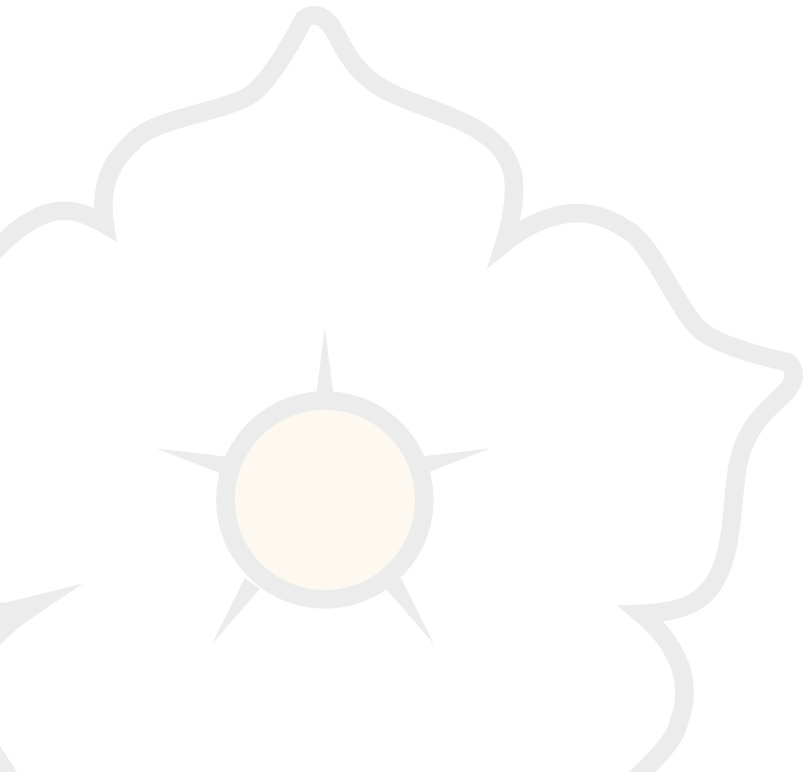
(not increasing the standard fee)

Carrying out purchases and sales

Writing a review of every purchase
and sale concluded

Paying

The standard fee is increased



16. PAYMENT METHODS



**Bank transfer
in advance**



**Bank transfer
30 days**

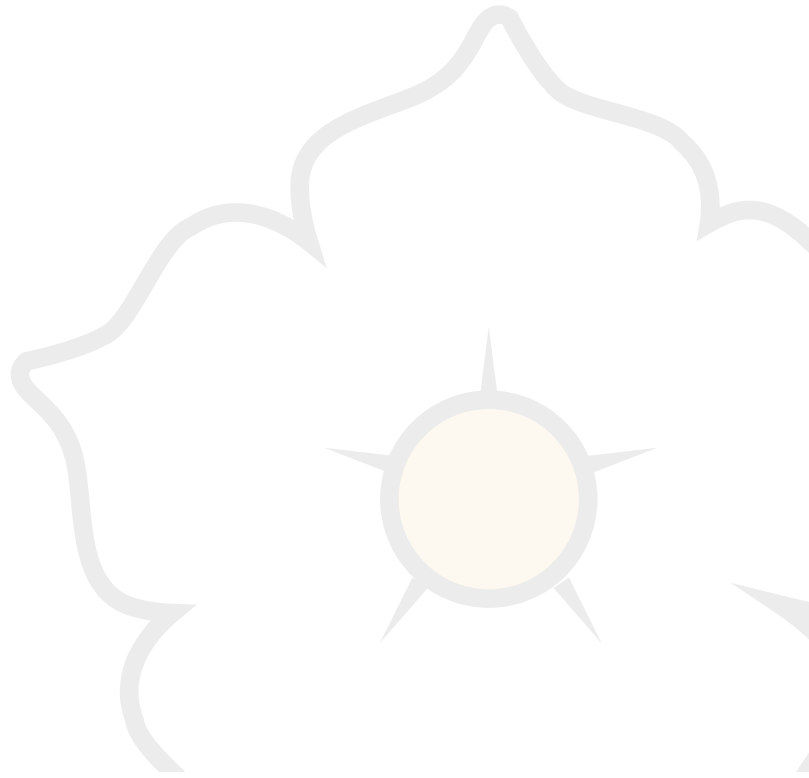


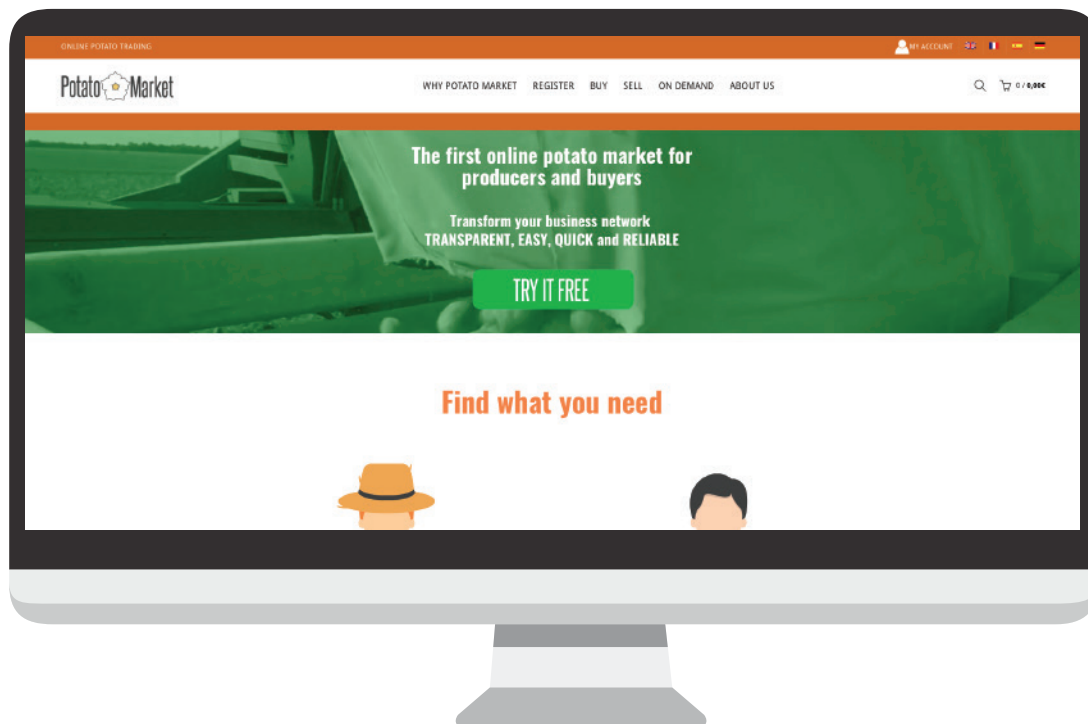
**Virtual POS
terminal**



**Financing
partner bank**

17. THE POTATOMARKET PLATFORM





Find what you need



IF YOU ARE A PRODUCER

- Access to a wide buyer network
- Know your competitors
- Be aware of demand
- Fix the right price
- Improve the stock management



IF YOU ARE A BUYER

- Be aware of the real market offer
- Find the best product at the best price
- Access to updated market information
- Do not rely on a limited number of intermediaries
- Know the fee you pay

The benefits of Potato Market



Transparency



Variety of potatoes



Competitive prices



Online gathering



Wide business network



Ease, agility and swiftness



Accessibility and convenience



Updated information



Reliability and assurance



Best offers



Availability



Financing

Services
provided



Supply and demand
searcher

Updated and gathered
information about supply



User rating system

Reviews about the
platform users



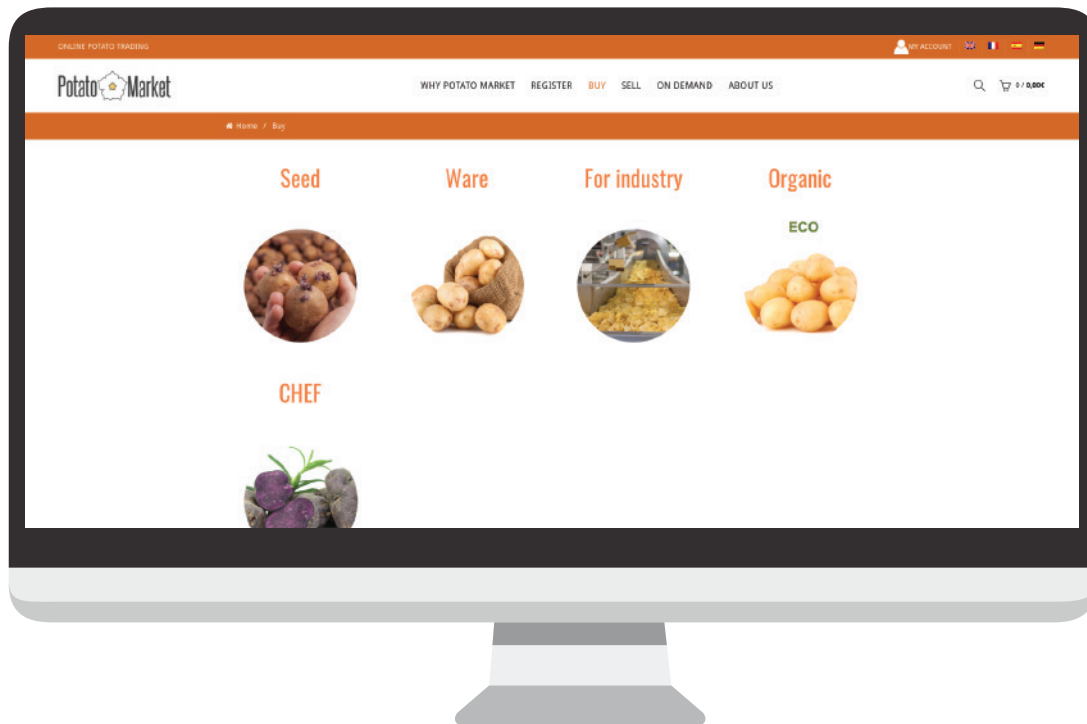
We find what you need

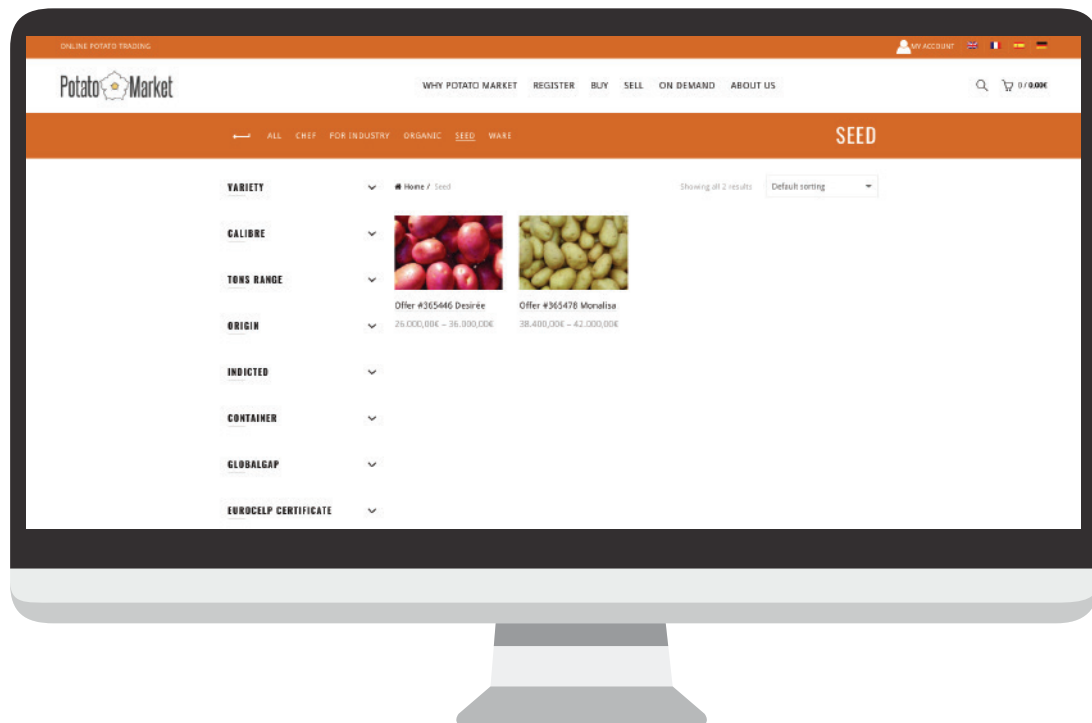
If you do not find what you need,
we find it for you

How does Potato Market works



The benefits of Potato Market







Offer #365478

Monalisa

38.400,00€ – 42.000,00€

0,23 – 0,28 €/T

120000 T

Variety: Monalisa

Origin: Montpellier

Collection date: 22/05/2017

5% external defects

3% internal defects

Caliber: 40+

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