DunhamTrimmer®
International Bio Intelligence

Biologicals into The Future

Positioning and Trends for Biologicals 3.0

April 2, 2025
BPIA Annual Meeting
Sacramento, CA

Rick Melnick, DunhamTrimmer
COO & Managing Partner

DunhamTrimmer®
International Bio Intelligence

The Biological Products Industry's Premier Strategic Business Consulting & Market Research Firm

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President & Founding Partner

35 Years - Crop Protection, Global R&D, Technology Acquisition & Licensing, BPIA Board Member

Manel Cervera
Managing Partner & CCO

25 Years - Biostimulants & Specialty Fertilizers, Regional/Global Marketing and Sales

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25+ Years - Global Ag Communications, Marketing &, Brand Management, Former BPIA Chair

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40 Years - Product Development 20 Years Bio-Industry EBIC Board Member

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25 Years - Global Ag Communications, Events, Marketing, & Executive Management

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Vice President

20+ Years - Crop Protection, Biocontrol, Bus. Development Investor Relations & Licensing, BPIA Board Member

Ignacio Moyano Córdoba
Vice President

20+ Years - Biologicals & Plant Nutrition, Tech Evaluation, Market Development, extensive LATAM experience

AGENDA

INTRODUCTION

GLOBAL BIOLOGICALS MARKET OVERVIEW

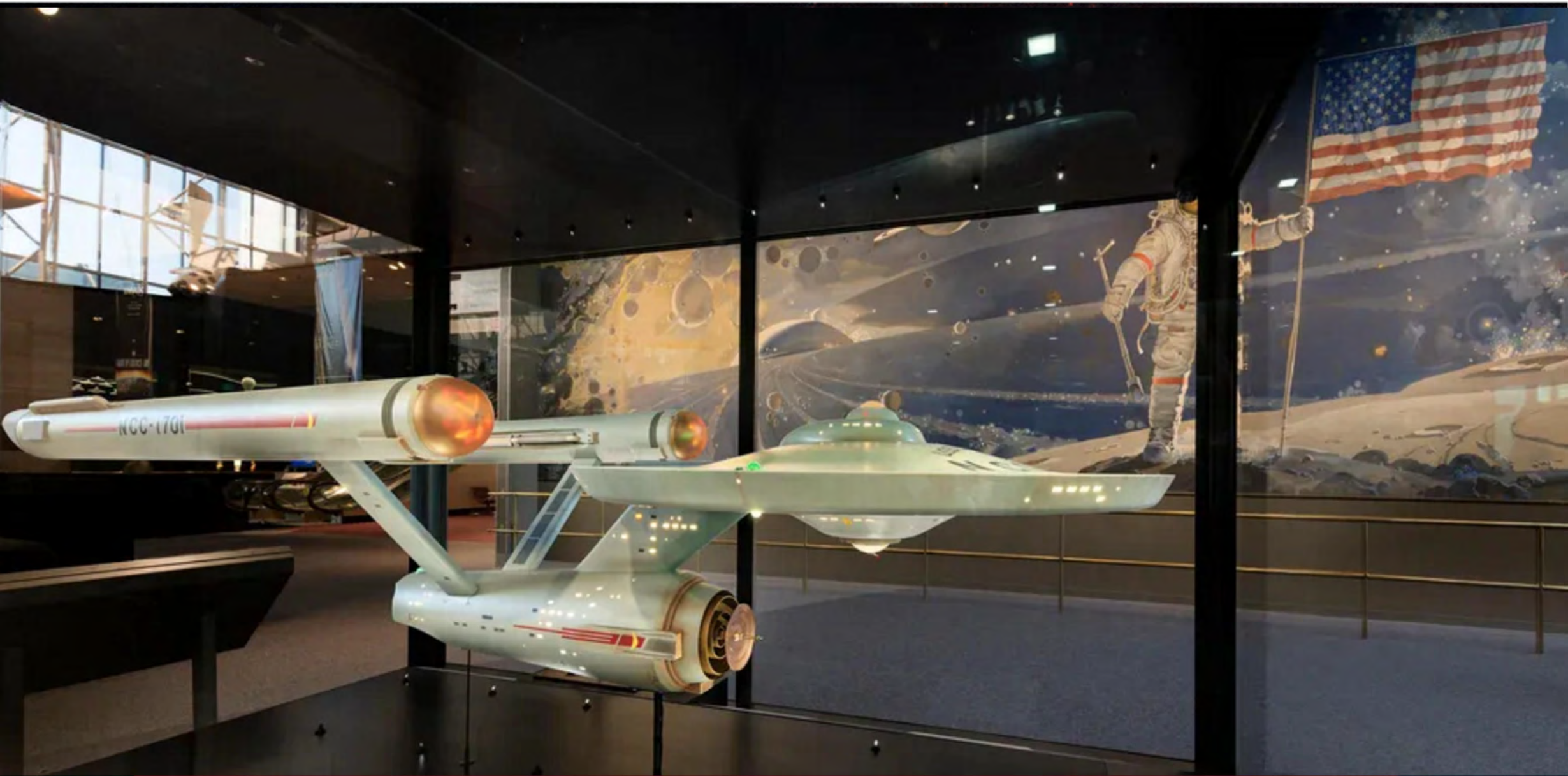
MARKET DRIVERS

MARKET PLAYERS

MARKET TRENDS

LOOKING AHEAD

BIOLOGICAL PRODUCTS INDUSTRY ALLIANCE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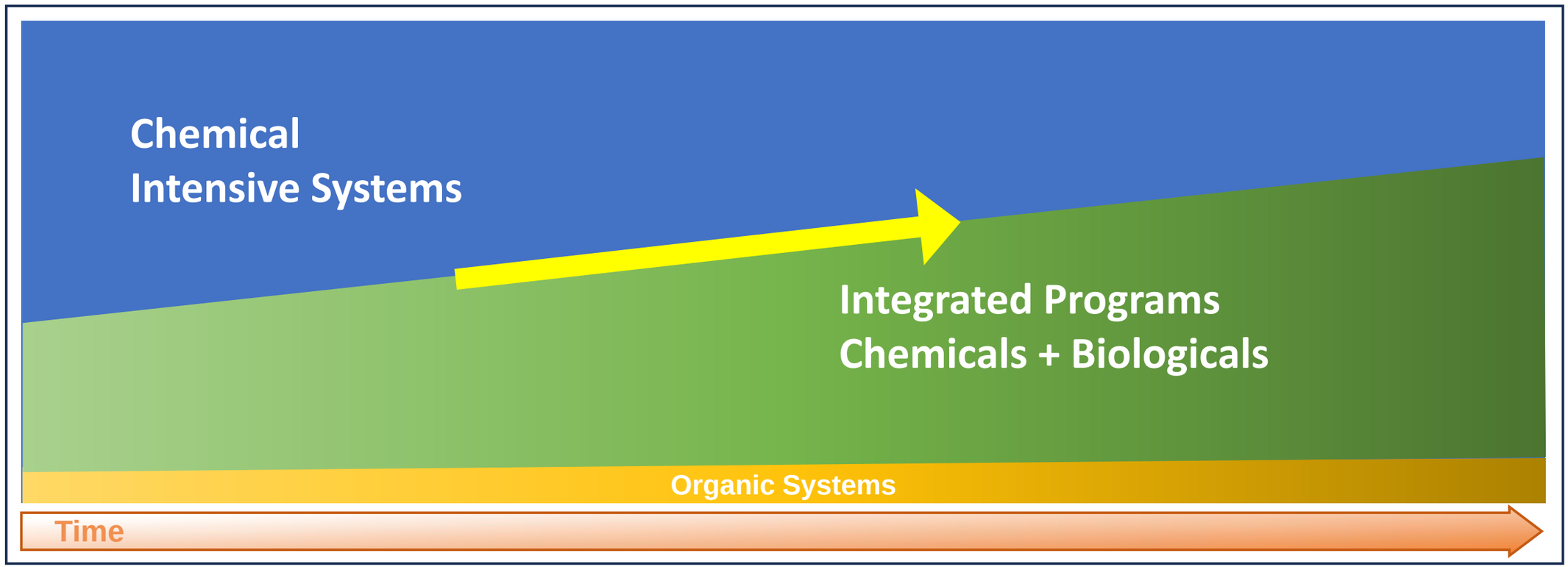
Biologicals Markets: What's Happening

Evolution toward integrated crop management systems



Biologicals Markets: **WHY** is this Happening?

BIOLOGICAL PRODUCTS

Source: DunhamTrimmer®, LLC

BIOSTIMULANTS[1]

MICROBIALS

- NUTRIENT USE EFFICIENCY (NUE) (BIOFERTILIZERS)[2]
- PLANT GROWTH PROMOTION (PGP)

NON-MICROBIAL

- PLANT & SEAWEED EXTRACTS
- AMINO ACIDS
- ORGANIC ACIDS
- INORGANIC COMPOUNDS

1 Biostimulants are products which elicit one or more of the following effects: 1) mitigate abiotic stress; 2) enhance crop quality; 3) improve nutrient assimilation. Their functions are typically classified as NUE (Nutrient Use Efficiency) or PGP (Plant Growth Promotion).

2 Biofertilizers are Microbials used to enhance plant nutrient uptake from soil (NUE).

- N-fixing bacteria make up the largest segment.
- N-fixing bacteria for non leguminous crops make up the fastest growing segment.
- Other NUE microbials include mobilizers and solubilizers or chelators of specific nutrients such as P, K, S, Zn, Fe.

PGP Microbials target other biostimulant properties beyond NUE.

Non-microbial biostimulants may target either NUE or other PGP effects.

- Amino Acids and Seaweed Extracts are the fastest growing segments.
- Seaweed Extracts are a complex mixture of components including plant hormones, phenolic compounds, and other active substances.
- Amino Acid products include peptide fractions.
- Organic acids are mainly humic and fulvic acids used as soil amendments.

BIOCONTROLS

BIOPESTICIDES[3]

- BIOCHEMICALS[4]
  - PLANT EXTRACTS
  - ORGANIC ACIDS
  - PGRs
  - SEMIOCHEMICALS
- MICROBIALS[5]
  - BACTERIA
  - FUNGI
  - PROTOZOA
  - VIRUS
  - YEASTS
  - OTHERS

3 Biopesticides are derived from natural materials such as plants, bacteria and certain minerals. Biopesticides target specific pests and are inherently less toxic than synthetic pesticides.

4 Biochemicals include Plant Extracts (largest by sales volume), Organic Acids, PGRs (plant hormones e.g. cytokinins, auxins, etc), and Semiochemicals (allelochemicals and pheromones).

MACROORGANISMS[6]

- INSECTS
- MITES
- NEMATODES

5 Microbials refer to products based on bacteria, fungi, viruses, and protozoans. Microbials comprise the largest market of biopesticides.

- Bacteria, followed by fungi, make up the largest groups commercially (>90%).
- Biggest challenges relate to product formulation with regard to shelf-life, stability, and performance enhancement.

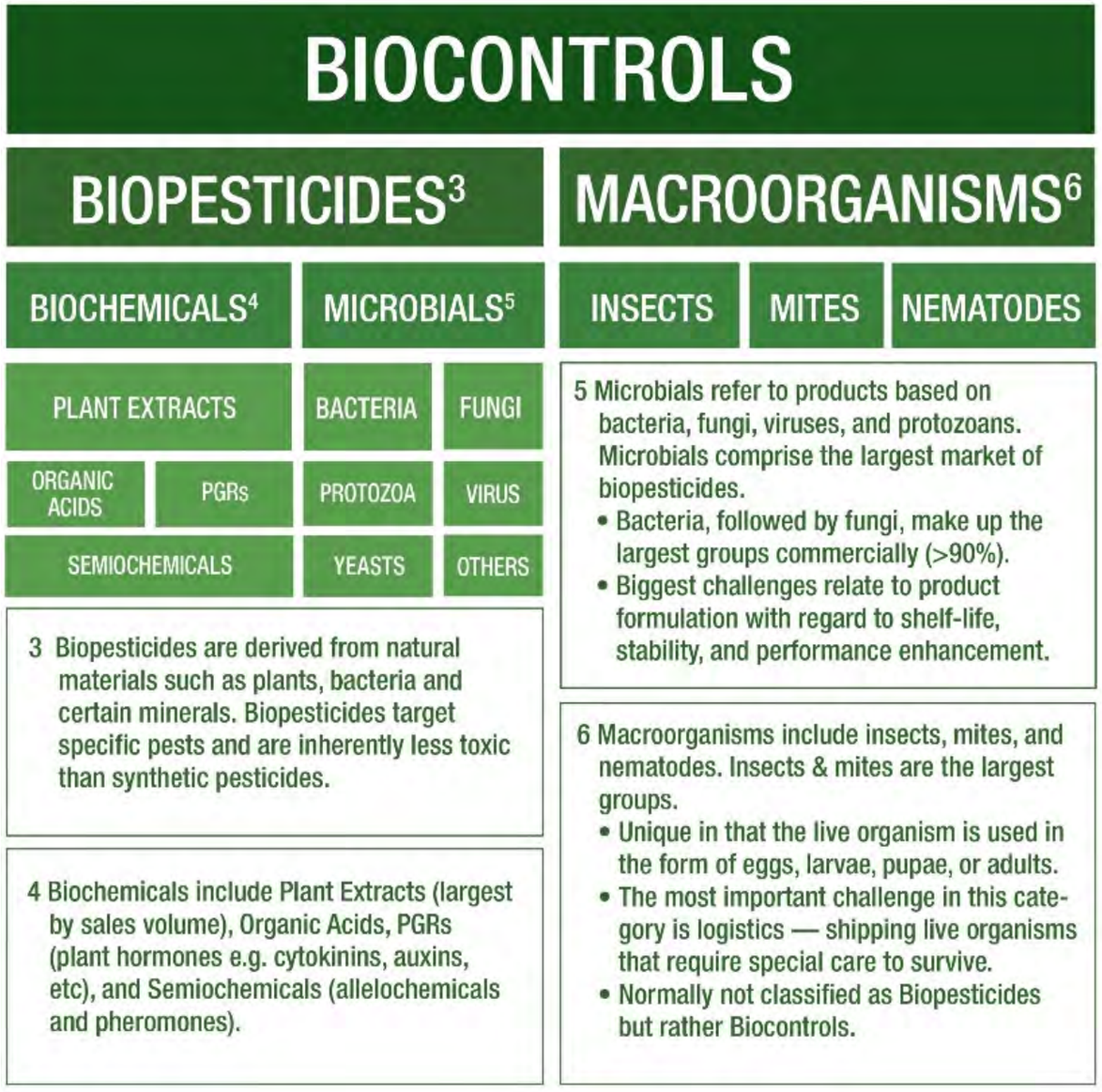
6 Macroorganisms include insects, mites, and nematodes. Insects & mites are the largest groups.

- Unique in that the live organism is used in the form of eggs, larvae, pupae, or adults.
- The most important challenge in this category is logistics — shipping live organisms that require special care to survive.
- Normally not classified as Biopesticides but rather Biocontrols.

BIOLOGICAL PRODUCTS

Source: DunhamTrimmer®, LLC

BIOSTIMULANTS[1]	BIOCONTROLS


BIOCONTROLS
BIOPESTICIDES3
MACROORGANISMS6
BIOCHEMICALS4
MICROBIALS5
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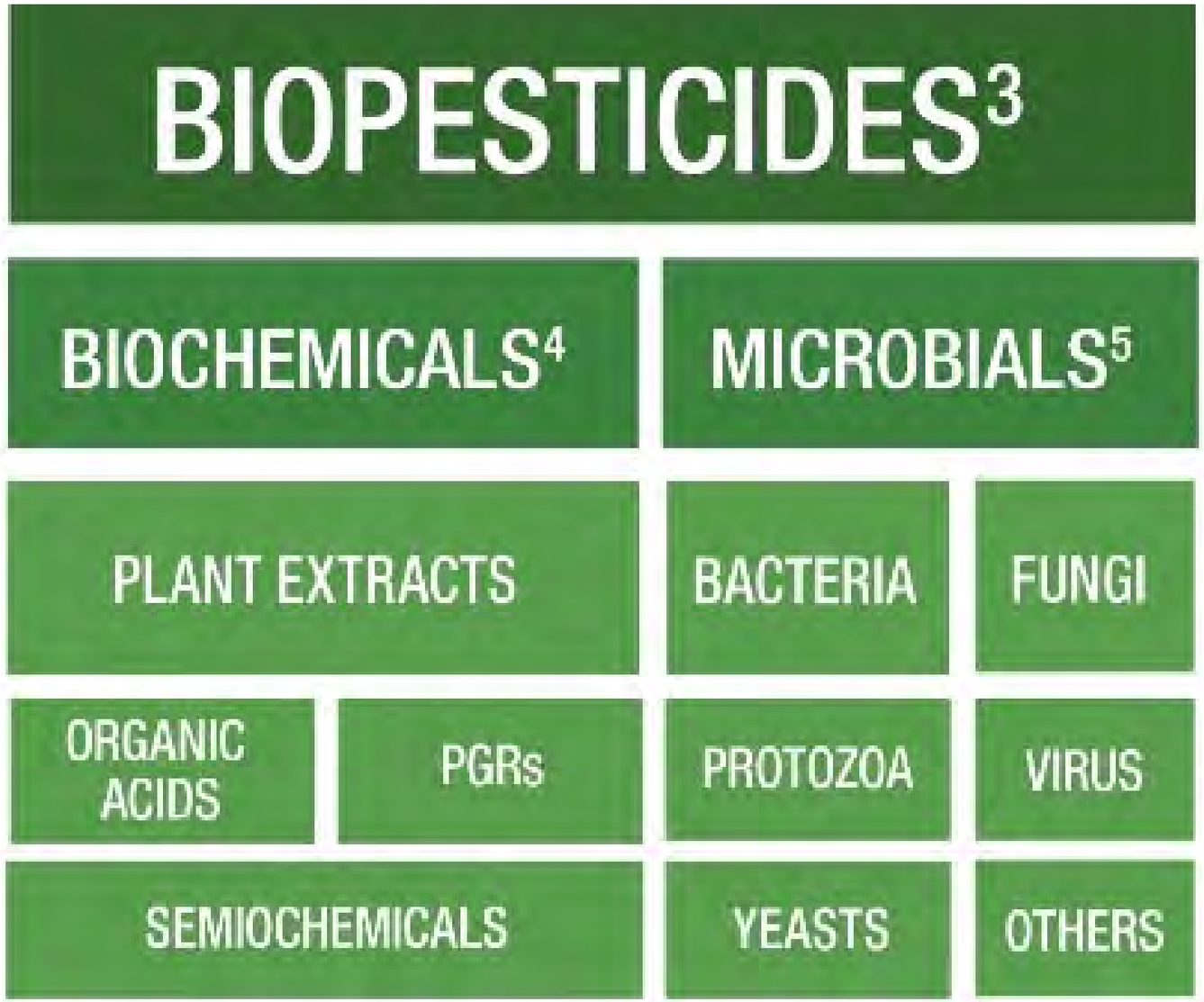
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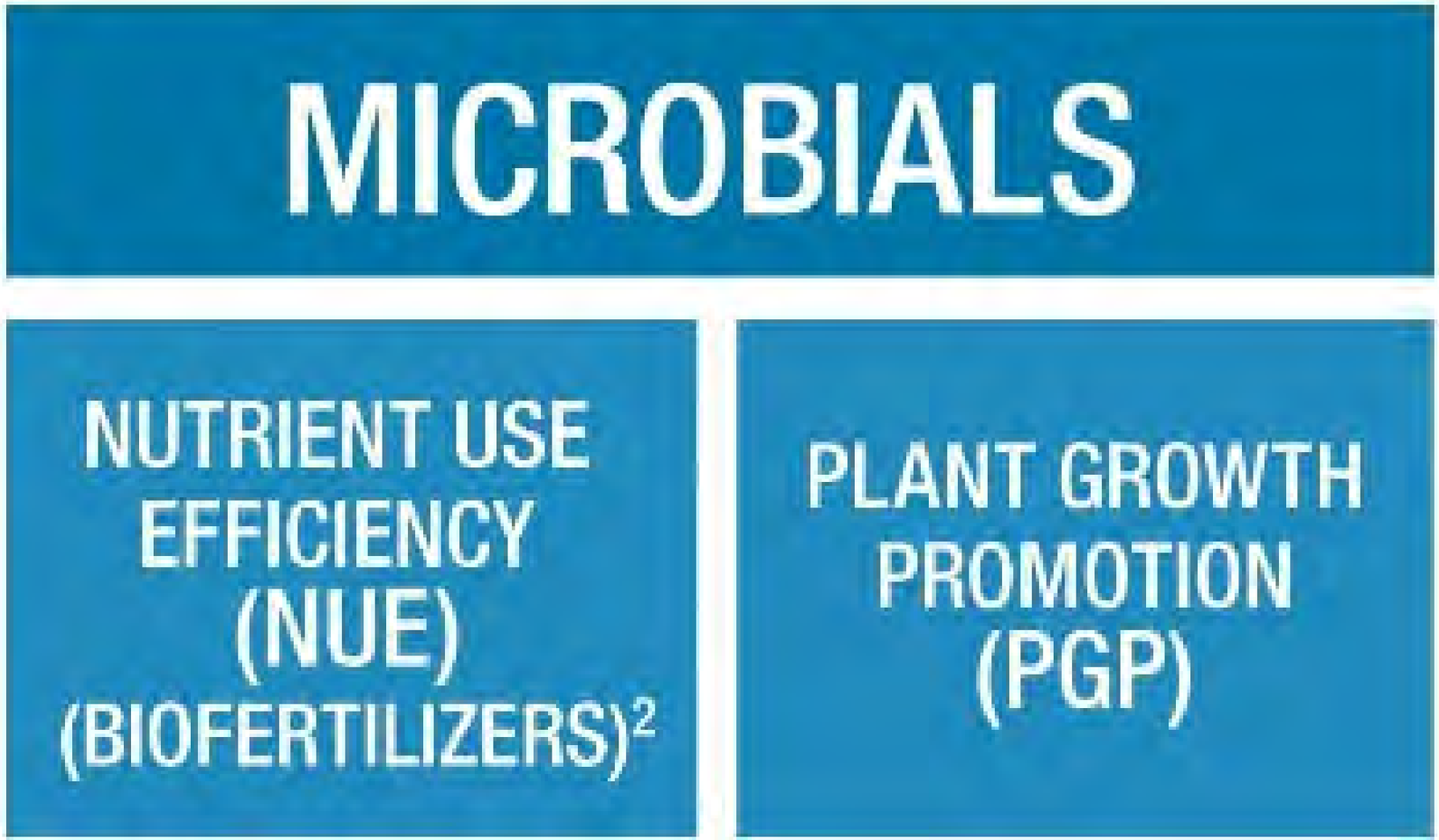
MICROBIALS
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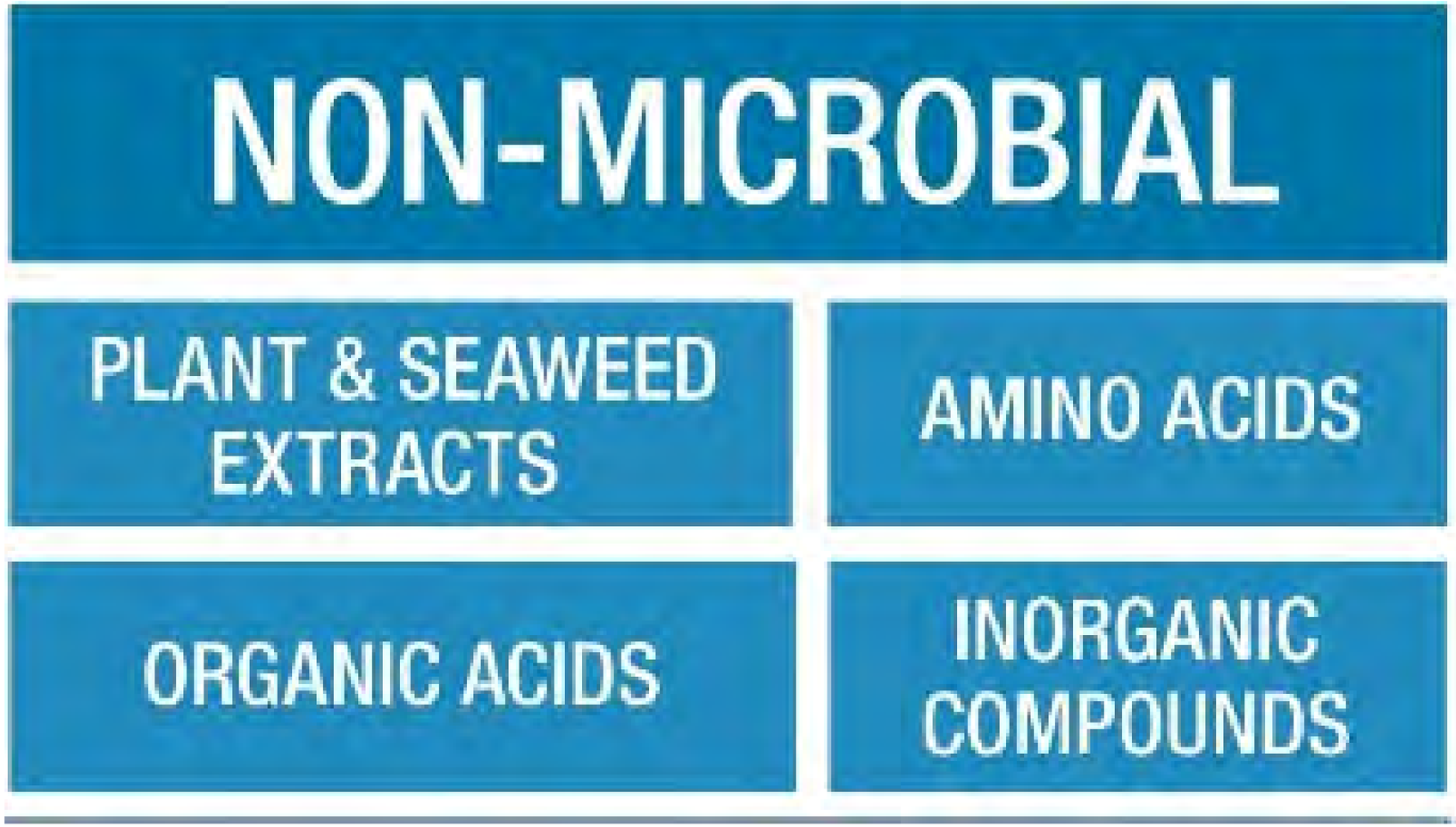
NON-MICROBIAL
PLANT & SEAWEED EXTRACTS
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ORGANIC ACIDS
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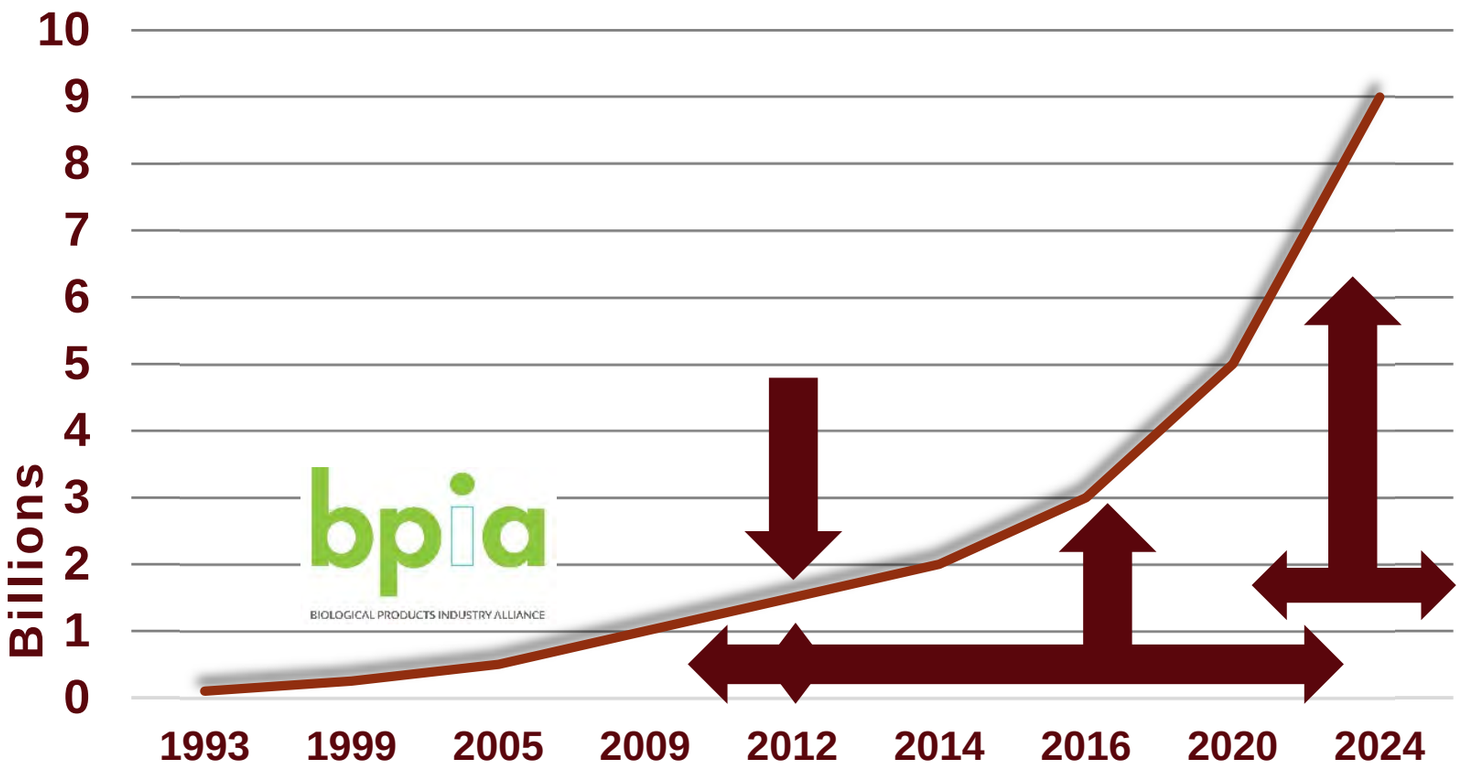
Global Biocontrol Market (Bn USD)



Market grew slowly until early 2000s

BPIA formed in 2001 and became a legal entity in 2003

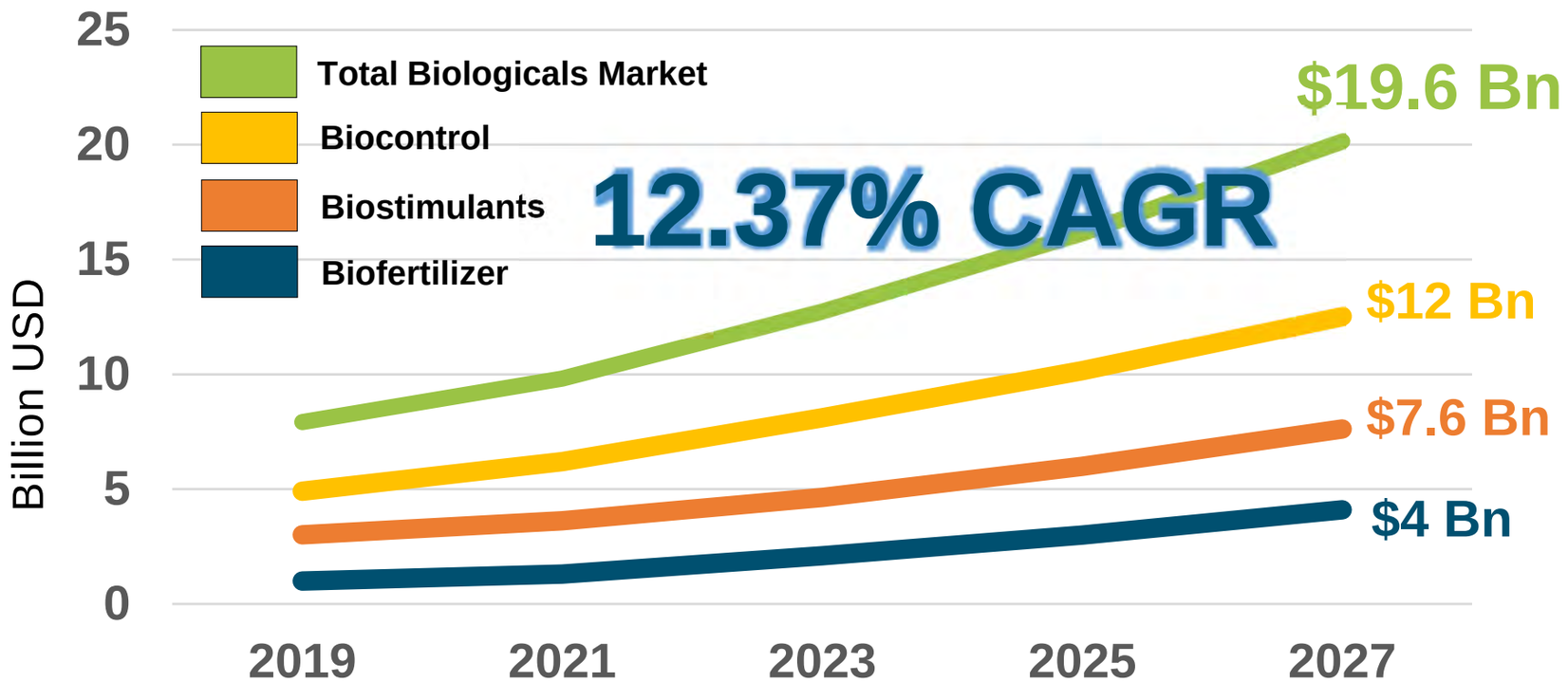
2012 – Entry of global companies

2010-2021 – Positive investment climate

2020-2024 –Expansion into row crops

Rapid Growth of Biologicals Markets

Global Biologicals Markets Landscape



- Global Biocontrol Market will eclipse $12 Billion in 2027
- Total Global Biostimulant Market will increase from $4.6 Billion in 2023 to $7.6 Billion in 2027
- Total Global Biofertilizer Market will double from $2 Billion to $4 Billion by 2027
- Total Global Biologicals Market estimated $12.75 Billion in 2023
- Total Biologicals Market will surpass $19.5 Billion in 2027

Biologicals Markets: **WHY** is this Happening?

Biologicals Markets: **WHY** is this Happening?

EVERYTHING ELSE

Biologicals Markets: **WHY** is this Happening?

Today's consumer generation

Has more information available

Wants to be involved

Wants to have a voice

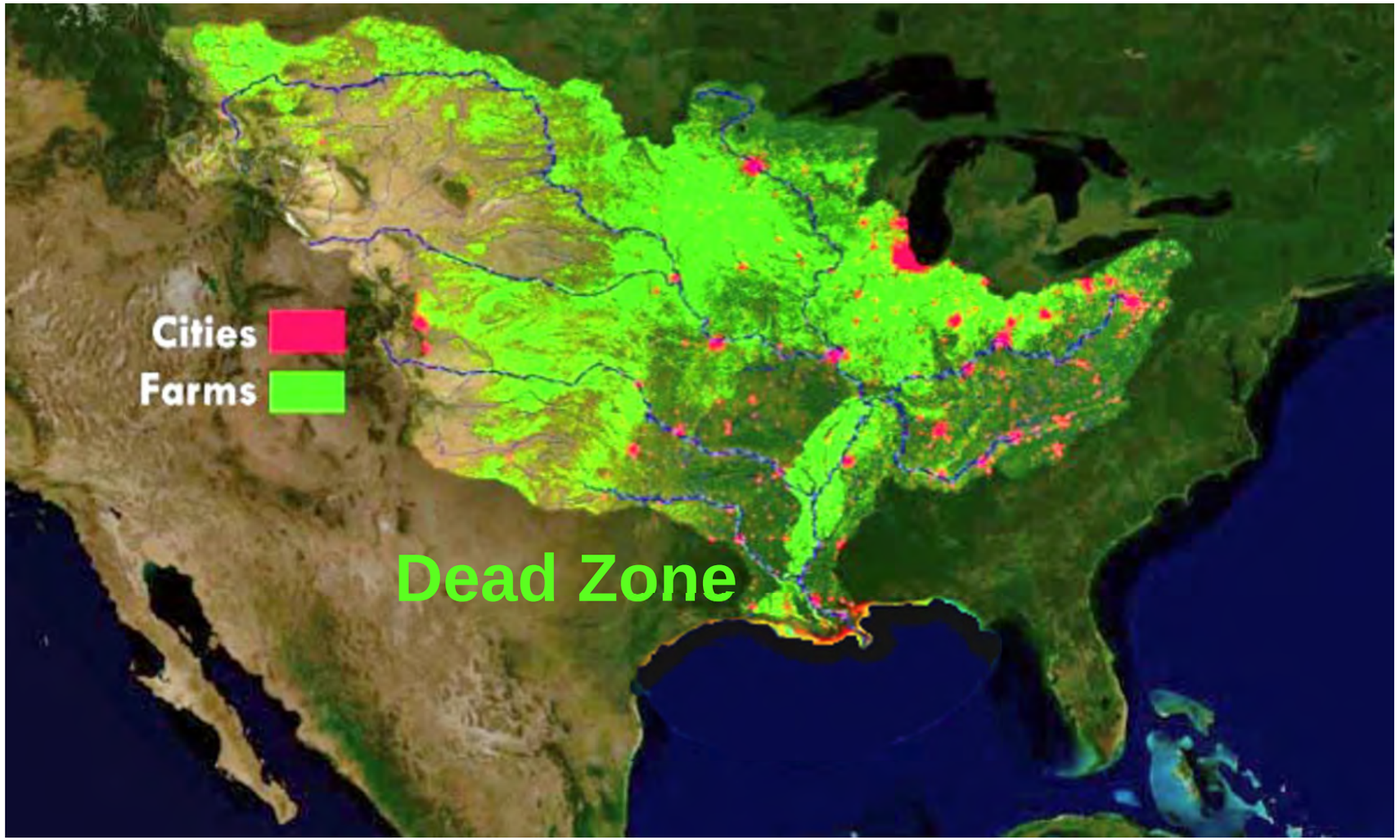
Wants to have an impact

Wants quality stuff

Is made up of a rising middle-class with money and a willingness to pay for what they want

The Gulf of Mexico

Nutrient loss (N, P) is a Major Disruptor of the Environment



N, P, and Pesticide Pollution in the Gulf of Mexico

NOAA
NATIONAL OCEANIC AND ATMOSPHERIC ADMINISTRATION
U.S. DEPARTMENT OF COMMERCE

Biologicals Markets: **WHY** is this Happening?

Biologicals Mar**WHY** is this Happening?

ING

This is
happening all
around the world

Food safety

Food security

Climate change

Environmental Impact

Regulatory System

Biological Solutions Driving Brazil

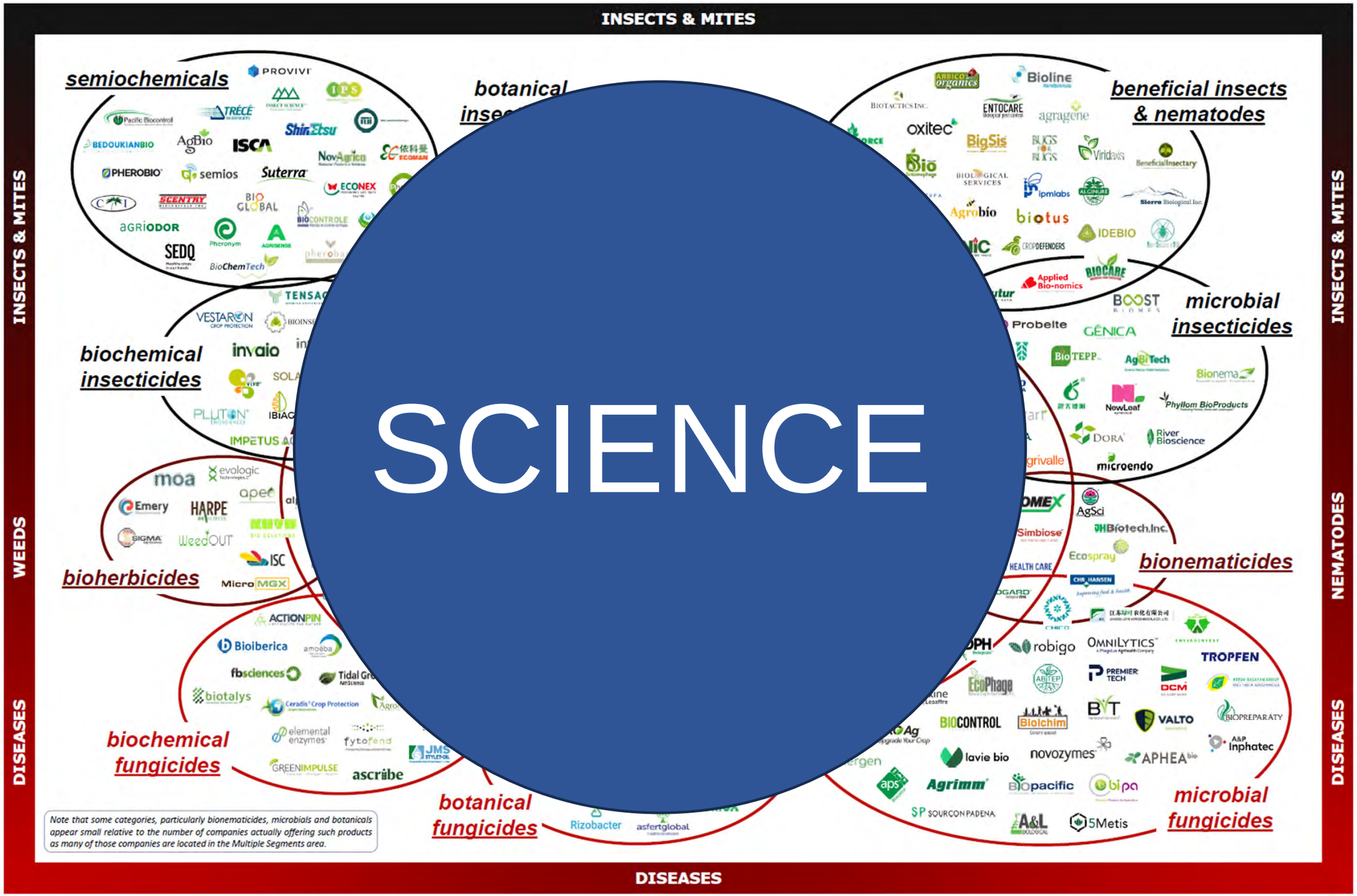
ING

Biologicals Innovation is Tied Directly to Regulatory

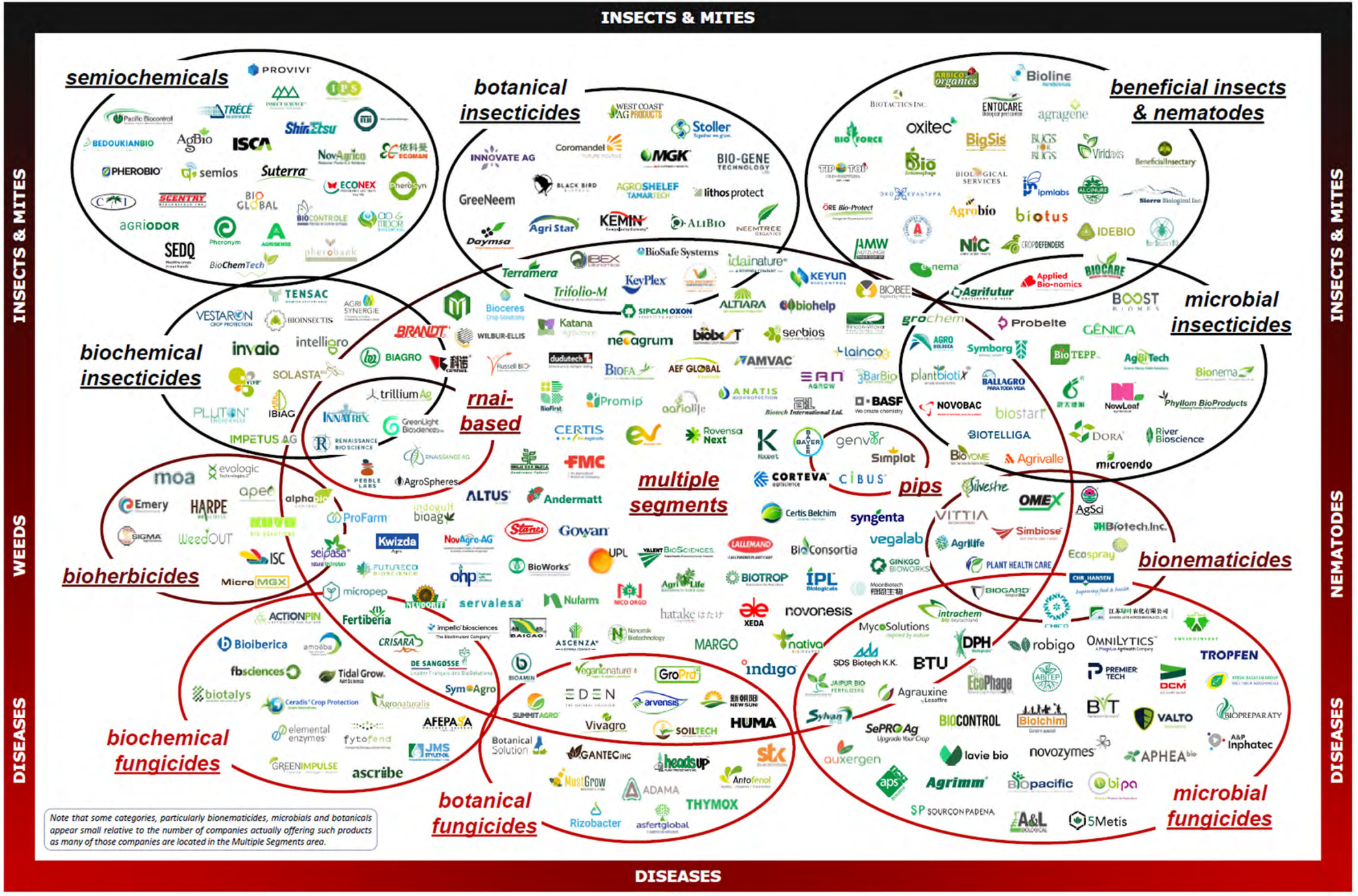
- Time and expense to required to register new products can be a major barrier to entry for new companies and new technologies
- Much of the innovation in this space still coming from smaller companies
- The predictability of these processes is of supreme importance to business planning, especially for pre-revenue companies

The Effect of the Multinationals Entering the Market

- Entry of the Multinationals boosted the credibility of the category (2012)
- Tons of activity over the last 5 years: parnterships, research agreements, mergers and acquisitions
- All of these new entrants infuse the industry with significant resources
- Many of these companies still depend upon smaller companies for the real innovation



Larry Taylor The Mixing Bowl


INSECTS & MITES
semiochemicals
botanical insecticides
beneficial insects & nematodes
biochemical insecticides
rnai-based
microbial insecticides
multiple segments
pips
bioherbicides
bionematicides
biochemical fungicides
botanical fungicides
microbial fungicides
INSECTS & MITES
WEEDS
DISEASES
NEMATODES
DISEASES
Larry Taylor The Mixing Bowl
Note that some categories, particularly bionematicides, microbials and botanicals appear small relative to the number of companies actually offering such products as many of those companies are located in the Multiple Segments area.

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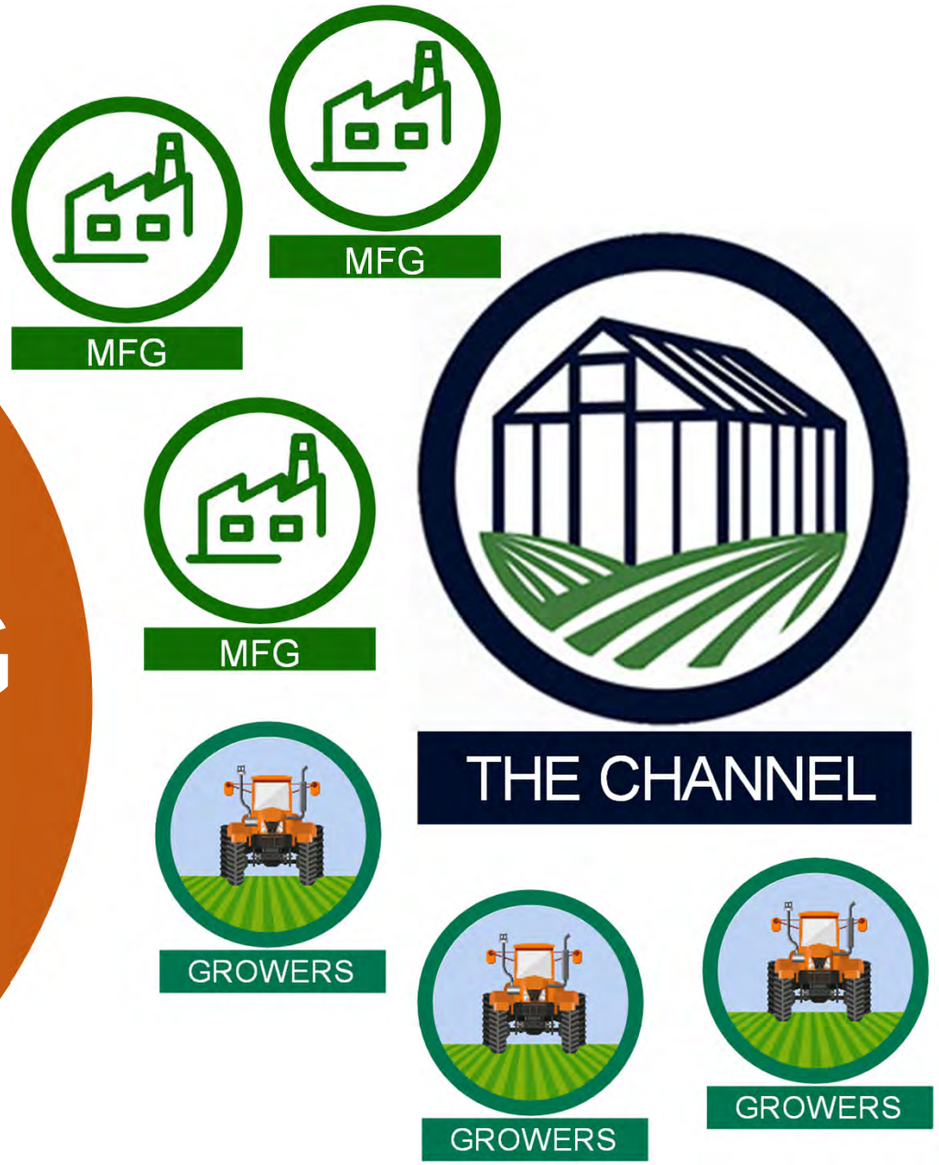

Have to assess new products with confidence

Have to understand the technologies

Have to sell the technologies

Have to provide field support

The ones that do this the best are the ones that win

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CONSUMER


POLICY


AGENCIES

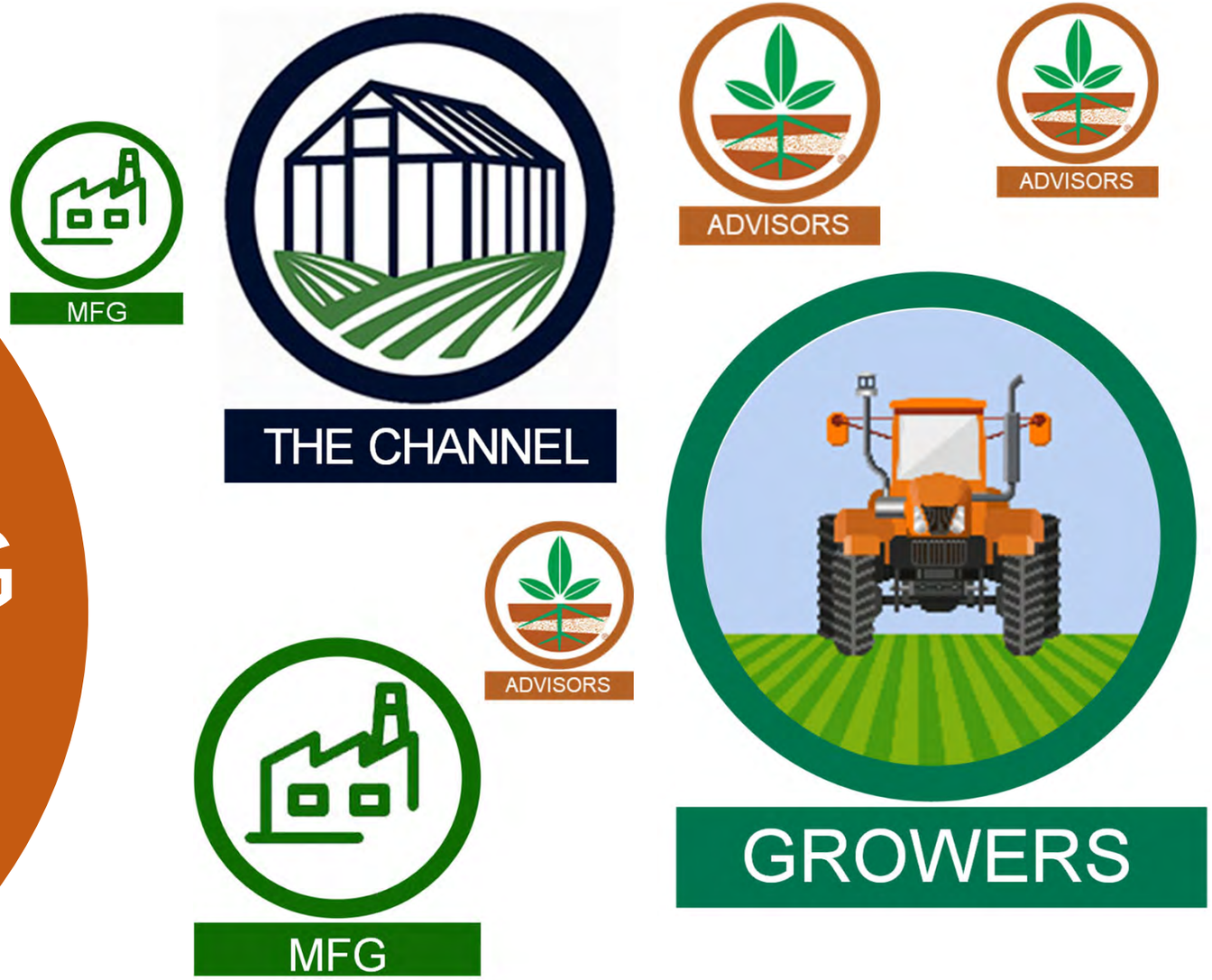

MFG


THE CHANNEL


GROWERS


ADVISORS

ING



Depend on the retailer

Depend on the manufacturer

Depend on advisors

Margins are thin: growers are techies, but not always anxious to try new things

They need encouragement from the people they trust and rely upon

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CONSUMER


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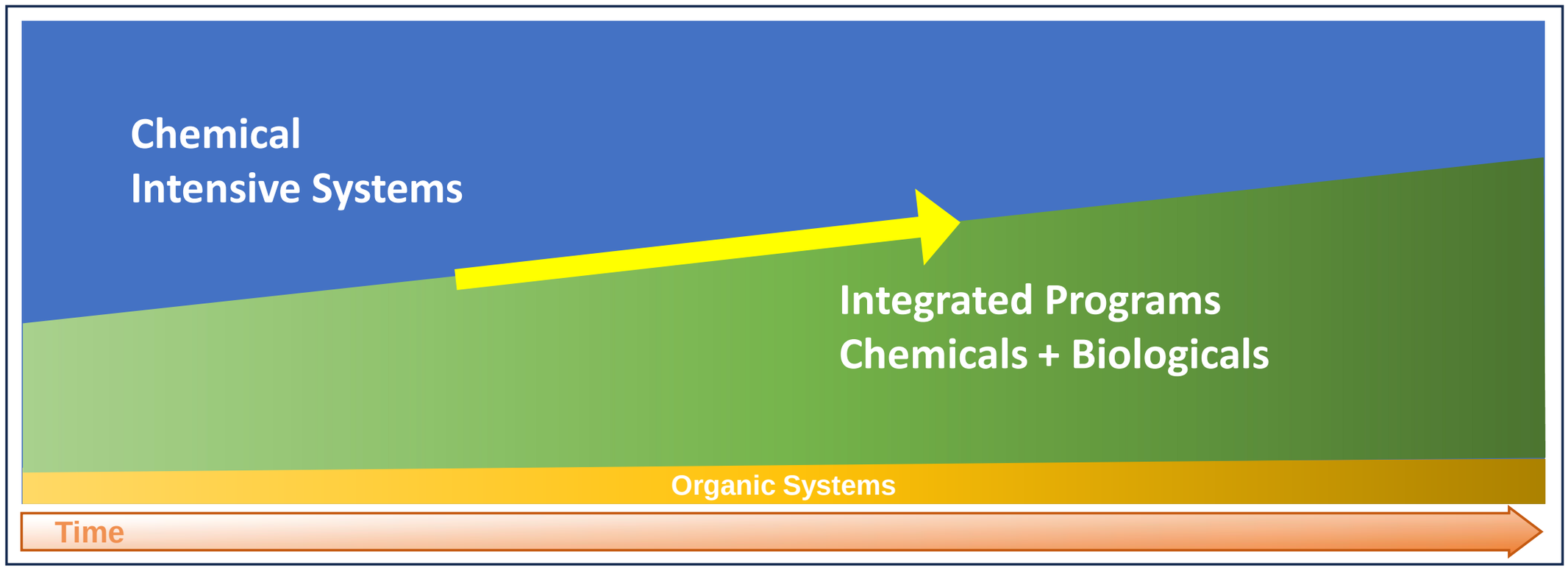
THE CHANNEL


MARKET
FOOD CO.


GROWERS


ADVISORS

Evolution toward integrated crop management systems



Biologicals Market Growth

Focus on Pesticide Residues

Integrated Programs
Chemicals + Biologicals

	ALDI	EDEKA	LIDL	REWE
MRL[1]:	70%	50%	33%	50%
ΣMRL[3]:	80%	--%	80%	100%
ARfD[2]:	80%	100%	100%	50%
ΣARfD[4]:	80%	--%	100%	--%
a.Ingredient	≤ 4/5	a.ingredient ≤ 5	a.ingredient ≤ 5	a.ingredient ≤ 5

[1] % of Maximum Residue Level
[2] % of Acute Reference Dose
[3] Sum of total MRL
[4] Sum of total ARfD

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value
value
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CONSUMER
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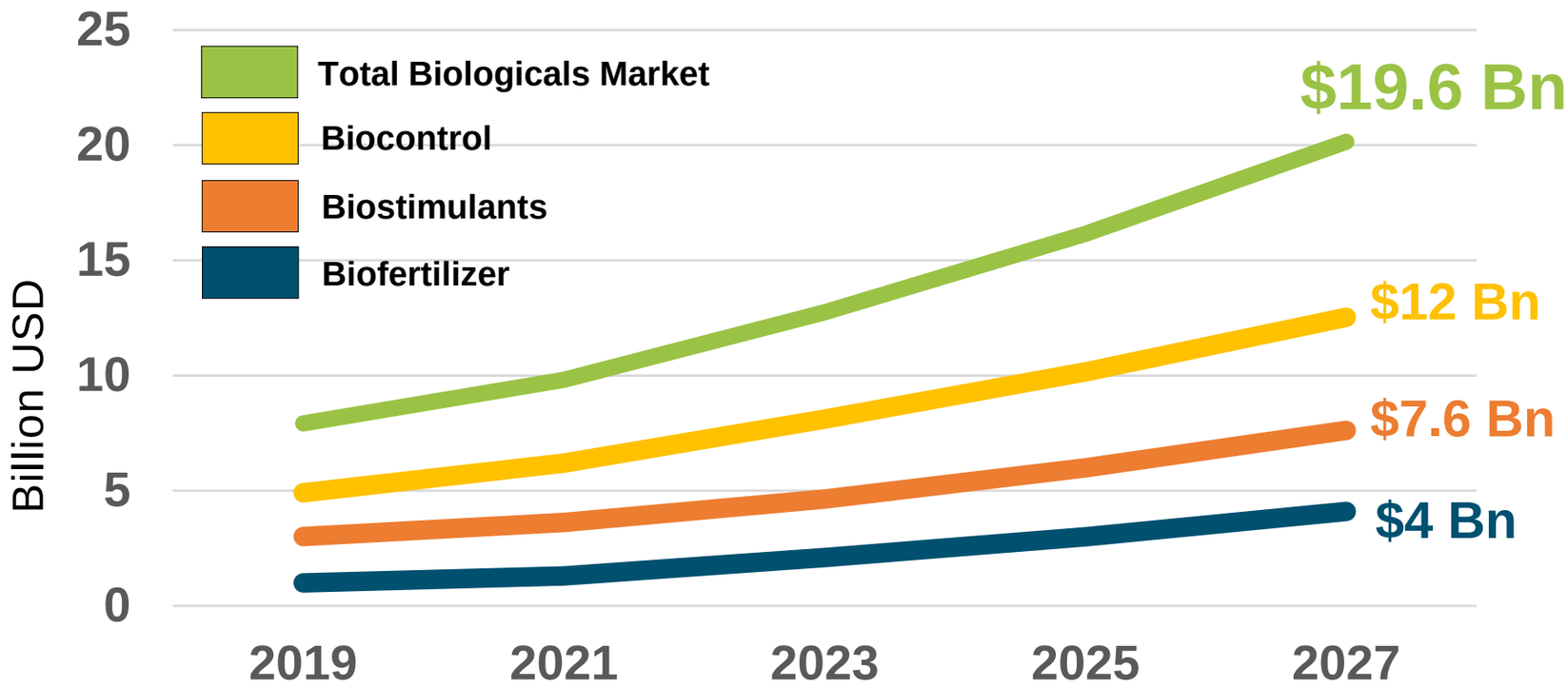
Rapid Growth of Biologicals Markets

Global Biologicals Markets Landscape



SCIENCE

Enables value **creation**
Enables value **capture**

Biologicals Market: **WHERE** are we **NOW**?

BIOLOGICALS **1.0**

HELLO, WORLD!

Early 90s  2005

Biologicals Market: **WHERE** are we **NOW**?

BIOLOGICALS **2.0**

FINDING OUR WAY

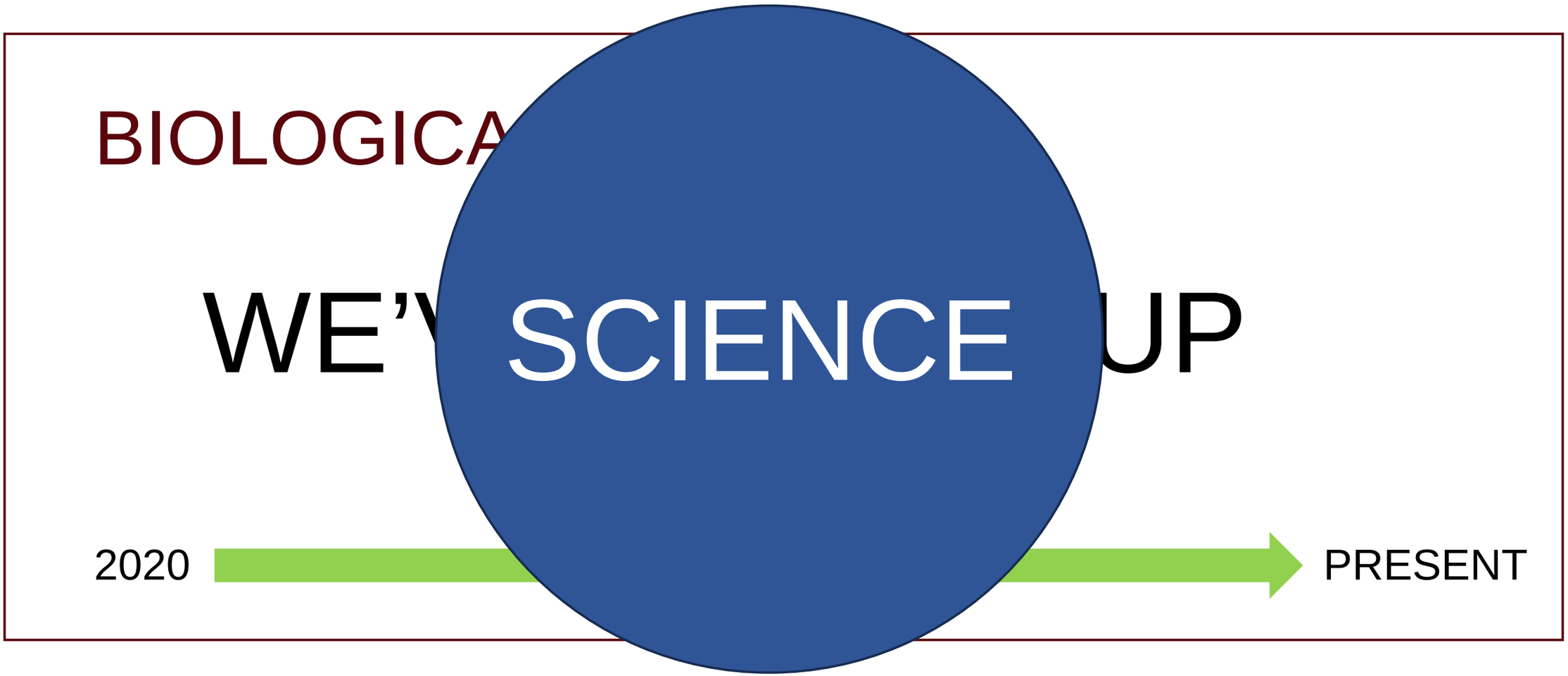
2005 → 2020

Biologicals Market: **WHERE** are we **NOW**?

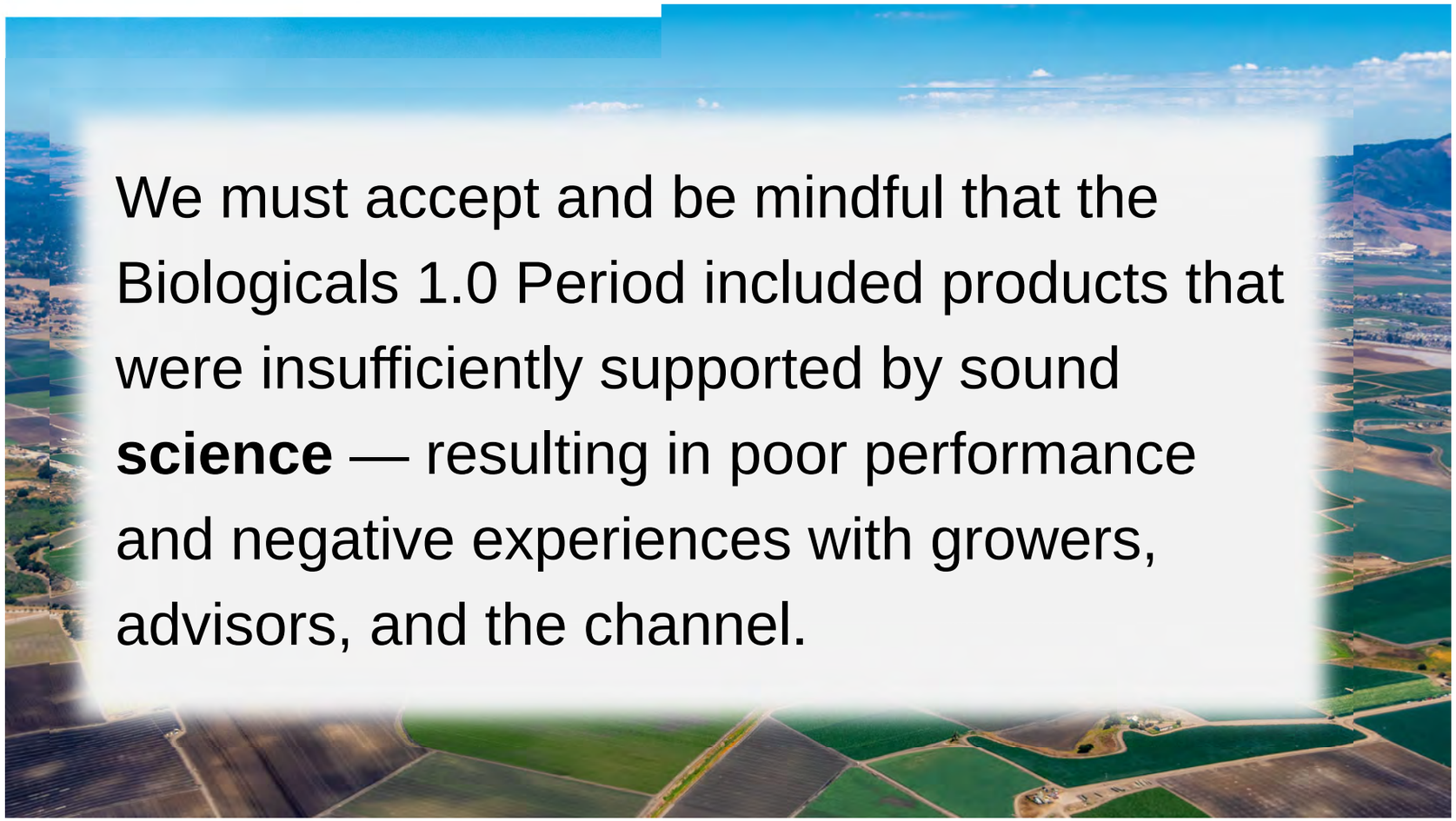
BIOLOGICALS **3.0**

WE'VE GROWN UP

Biologicals Market: **WHERE** are we **NOW**?



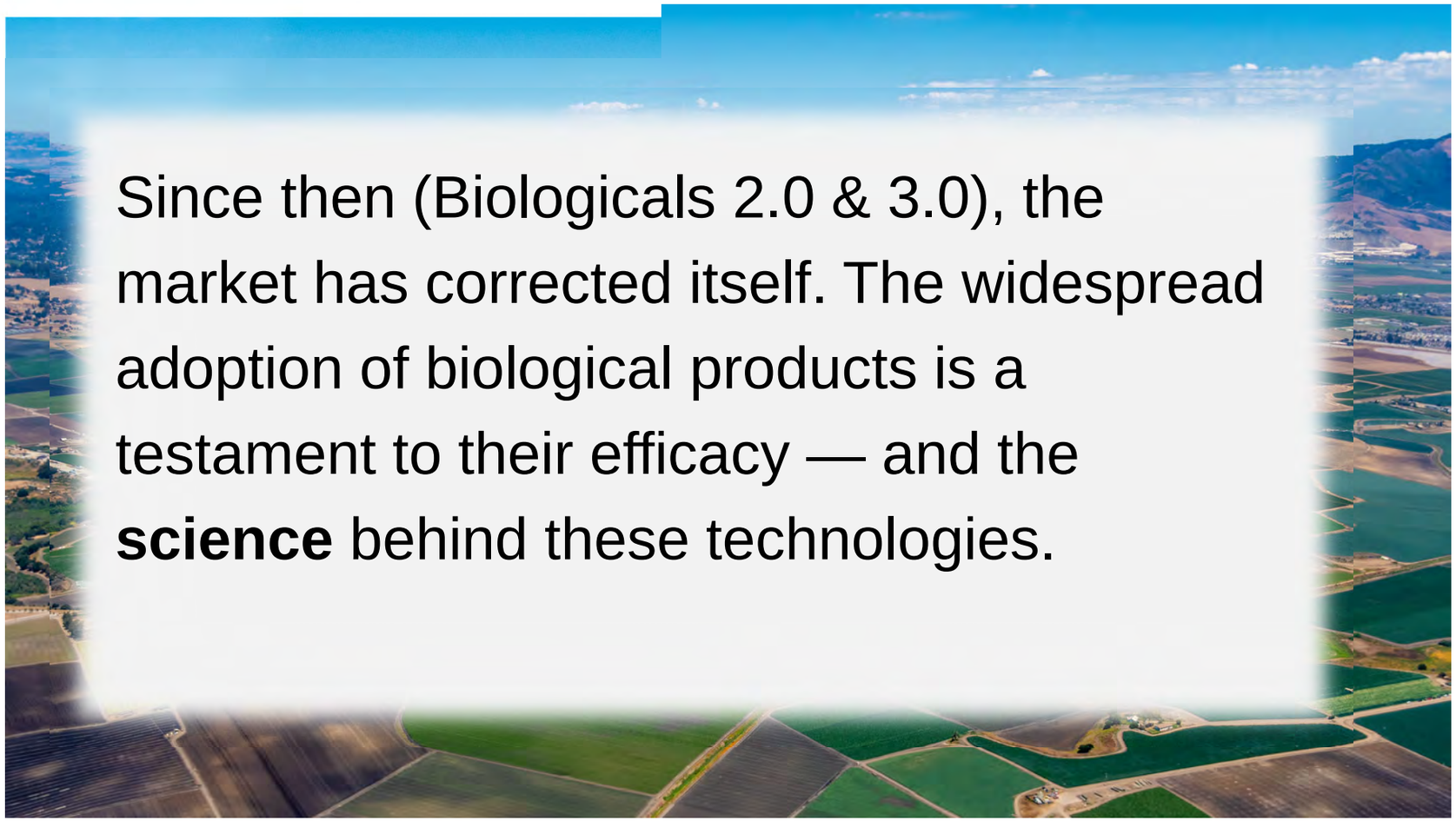
Biologicals 3.0



We must accept and be mindful that the Biologicals 1.0 Period included products that were insufficiently supported by sound **science** — resulting in poor performance and negative experiences with growers, advisors, and the channel.

bpia
BIOLOGICAL PRODUCTS INDUSTRY ALLIANCE

Biologicals 3.0



Since then (Biologicals 2.0 & 3.0), the market has corrected itself. The widespread adoption of biological products is a testament to their efficacy — and the **science** behind these technologies.

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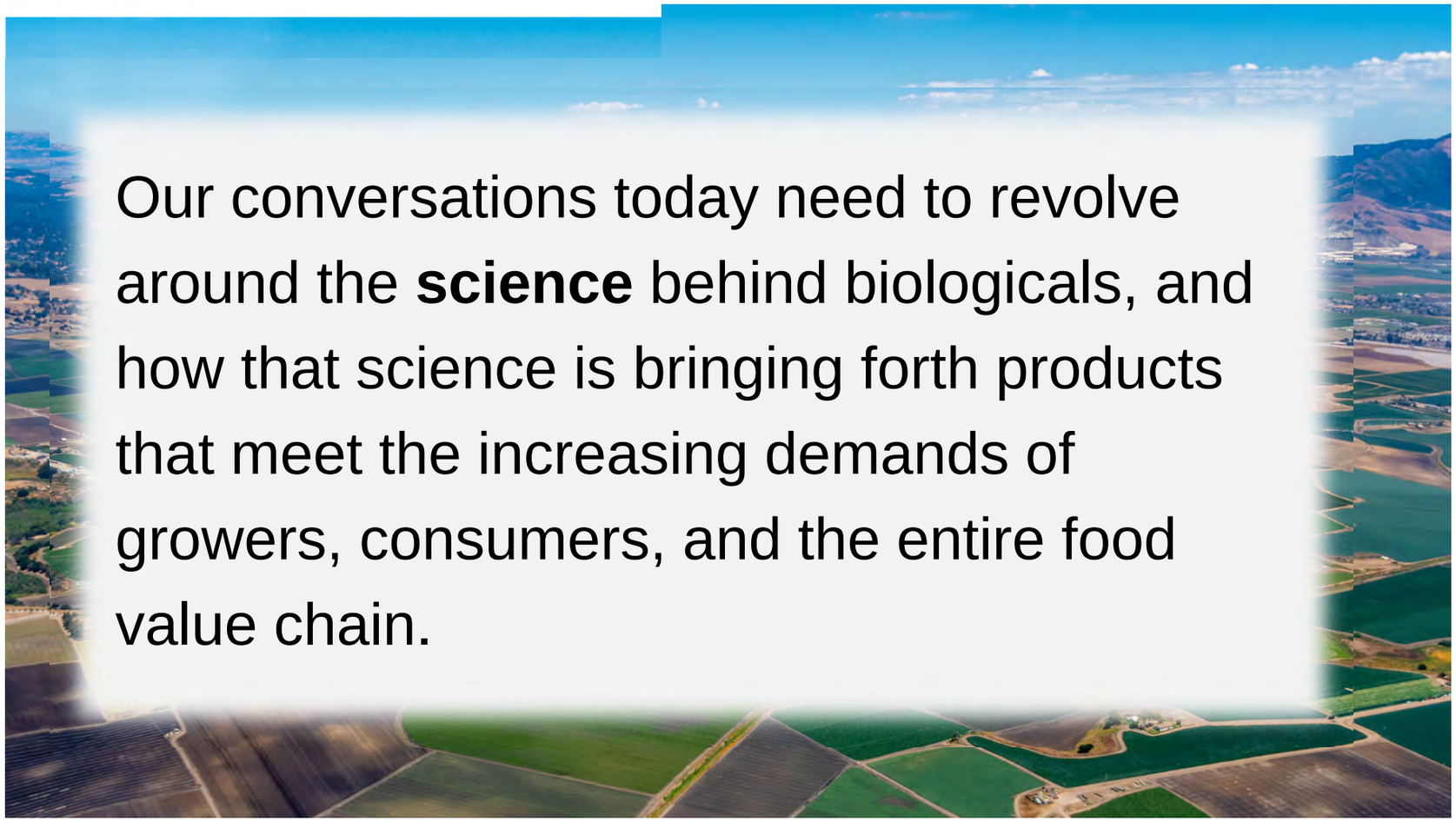
BIOLOGICAL PRODUCTS INDUSTRY ALLIANCE

Biologicals 3.0



Our conversations today need to revolve around the **science** behind biologicals, and how that science is bringing forth products that meet the increasing demands of growers, consumers, and the entire food value chain.

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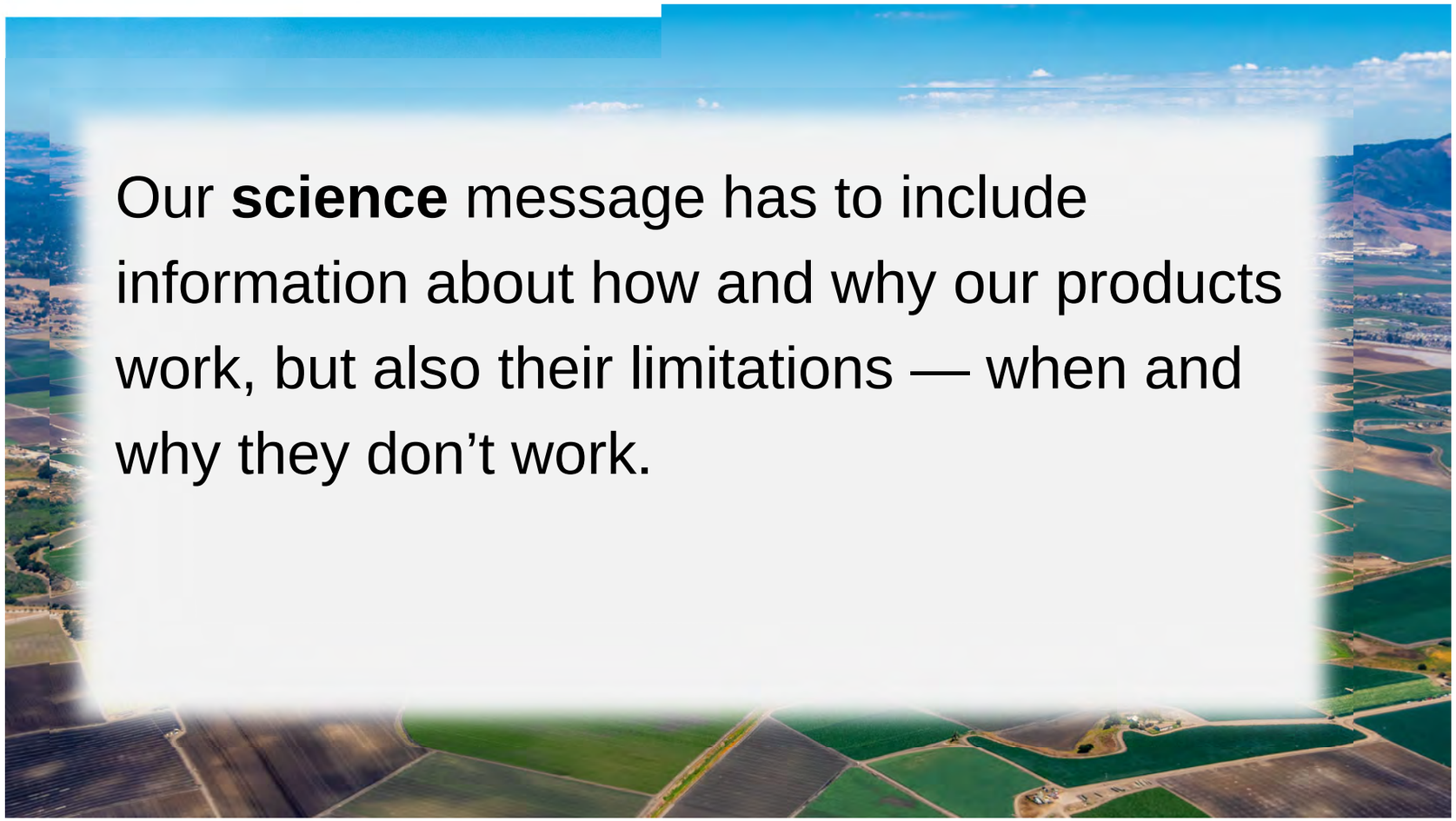
BIOLOGICAL PRODUCTS INDUSTRY ALLIANCE

Biologicals 3.0



Our **science** message has to include information about how and why our products work, but also their limitations — when and why they don't work.

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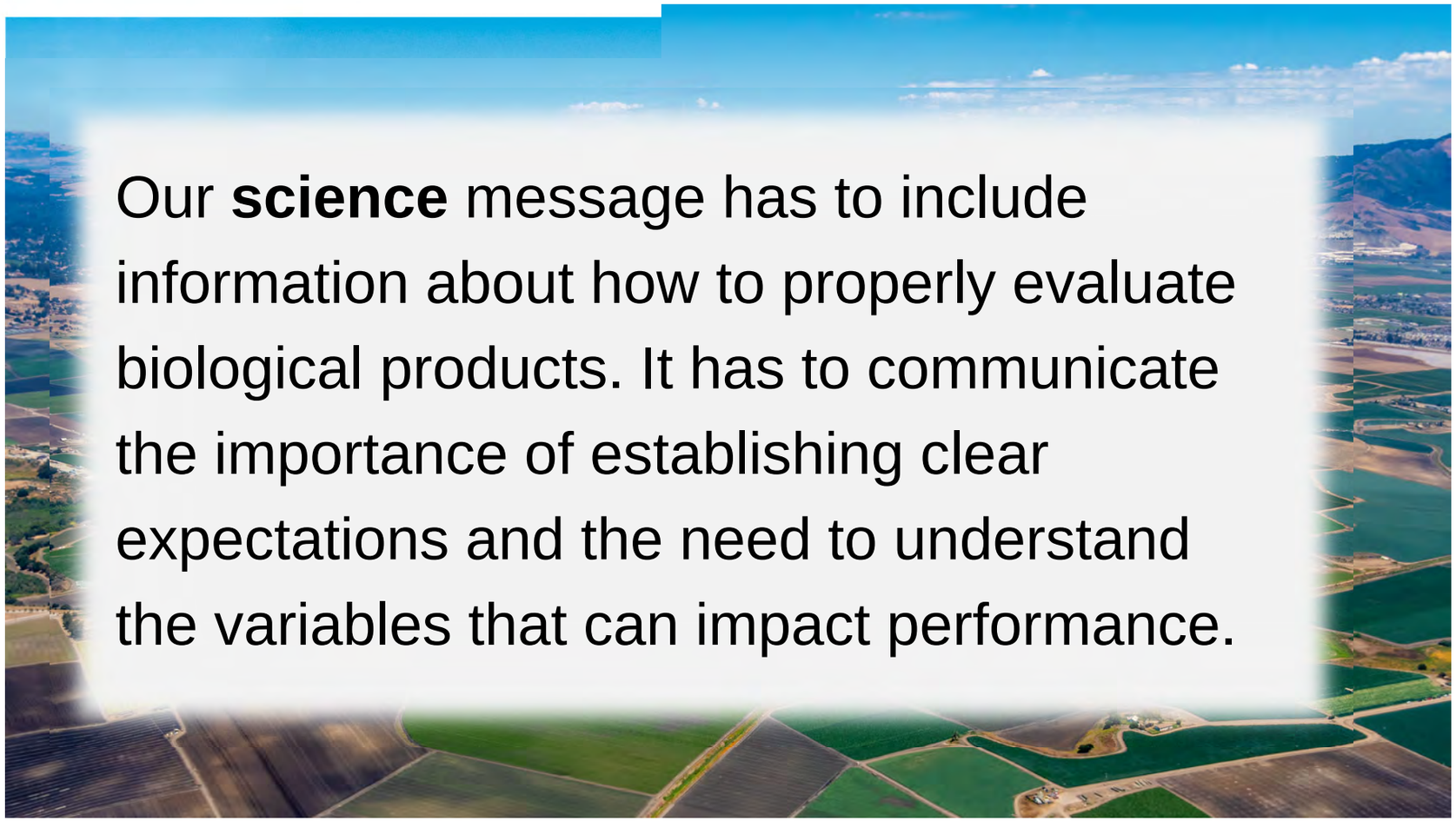
BIOLOGICAL PRODUCTS INDUSTRY ALLIANCE

Biologicals 3.0



Our **science** message has to include information about how to properly evaluate biological products. It has to communicate the importance of establishing clear expectations and the need to understand the variables that can impact performance.

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BIOLOGICAL PRODUCTS INDUSTRY ALLIANCE

Biologicals 3.0

Biostimulants Science

Biostimulants:

Can improve crop vigor and quality

Can improve crop tolerance to abiotic stress

Can help improve Nutrient Use Efficiency

Can enhance the development of soil microbes

Can stimulate root growth and water use efficiency

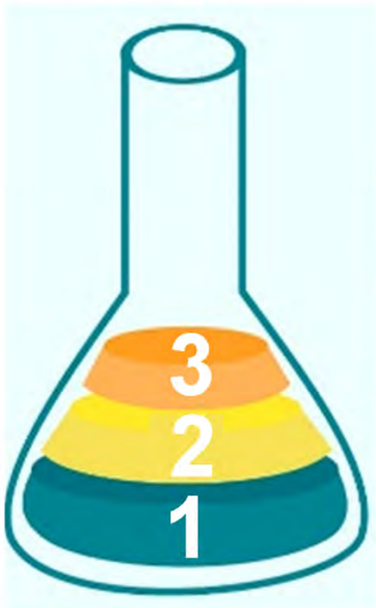
Can reduce greenhouse gas emissions

Can help growers preserve the yield potential of their crop

Can reduce waste (**Value-Added Fertilizers**)

Biologicals 3.0

Value-Added Fertilizers



1 Foundational Components
Compounds that provide essential nutrients necessary for plant development

2 Functional Components
Primarily biostimulants, which improve nutrient assimilation, promote stress resilience, and optimize plant physiological processes

3 Enhancement Components
Chemical additives that improve the stability, compatibility, and delivery of nutrients and biostimulants

VAF COMPOSITION: PREFORMULATION PARAMETERS

- **Foundational Nutrient Components** 5% to 98%
- **Functional/Physiological Components** 0.5% to 25%
- **Performance Enhancing Components** 0.2% to 12.0%

75% of all Biostimulants are sold as part of Value-Added Fertilizer Blends (VAFs)

VAFs co…ational com…nts + er…

c…

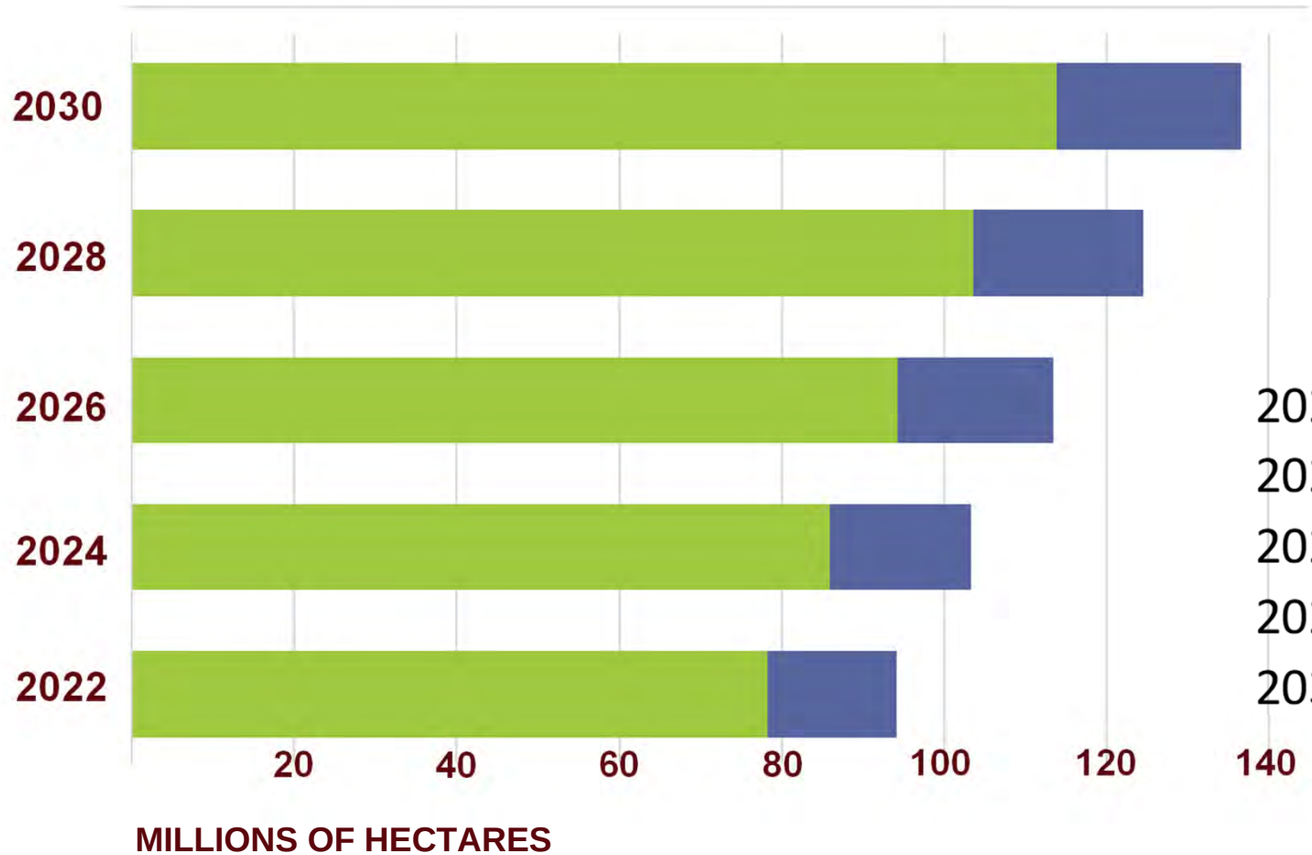
VAF…nd allow for …ication

VAFs reduce waste and lessen environmental impact

VAFs deliver high ROI

SCIENCE

US Value-Added Fertilizer Hectares Treated (MN) 2022-2030



ROW CROPS SPECIALTY CROPS

	Row Crops	Specialty Crops	Total
2022	78.19	15.92	94.11
2024	85.88	17.42	103.30
2026	94.32	19.06	113.38
2028	103.59	20.85	124.44
2030	113.78	22.81	136.59

Biologicals 3.0

Biostimulant Trends

Challenge: Biostimulant products work, but the plant response relies on agroecological factors, climatic factors, and management system factors.

- Dependence on these variables means it can be very difficult to replicate results year on year
- Demand creation and technical support for these products often lands on the distributor/retailer
- It is critical that we communicate the science behind these products, and how these variable factor into the performance equation

Biologicals 3.0

Biostimulant Trends

Challenge: The lack of IP protection in the biostimulant market results in differentiation challenges for suppliers

- Lack of IP protection and less intense regulatory requirements create low barriers to entry
- Relatively low number of basic substance suppliers means many products include the same material
- Formulators create the value through unique combinations of ingredients
- It is critical that we communicate the science behind these products, and where the effects are coming from given their complex nature

Biologicals 3.0

Biocontrol Science

Biocontrols:

- Integrate well in systems with conventional products
- Mitigate negative environmental impacts
- Are typically exempt from residue tolerance
- Can typically be applied right up until harvest
- Typically have lowest allowable PHI and REI
- Provide effective resistance management tools
- Can improve fruit quality and packout
- Can help to manage labor costs

Biologicals 3.0

Biocontrol Trends

We are beginning to see adoption of biocontrols more prominently into US Row Crops.

- A few years ago, adoption was minimal and limited to a few bioinsecticide seed treaments
- Today, companies are adapting and learning from their successes in Brazil
- Conditions in Brazil are different – continuous cropping, subtropical climate, different soils
- Still, biologicals now control 80% Brazil's bionematicide market – proving biologicals' efficacy beyond a doubt

Biologicals 3.0

Biocontrol Trends

Planter box treatments are making a big comeback.

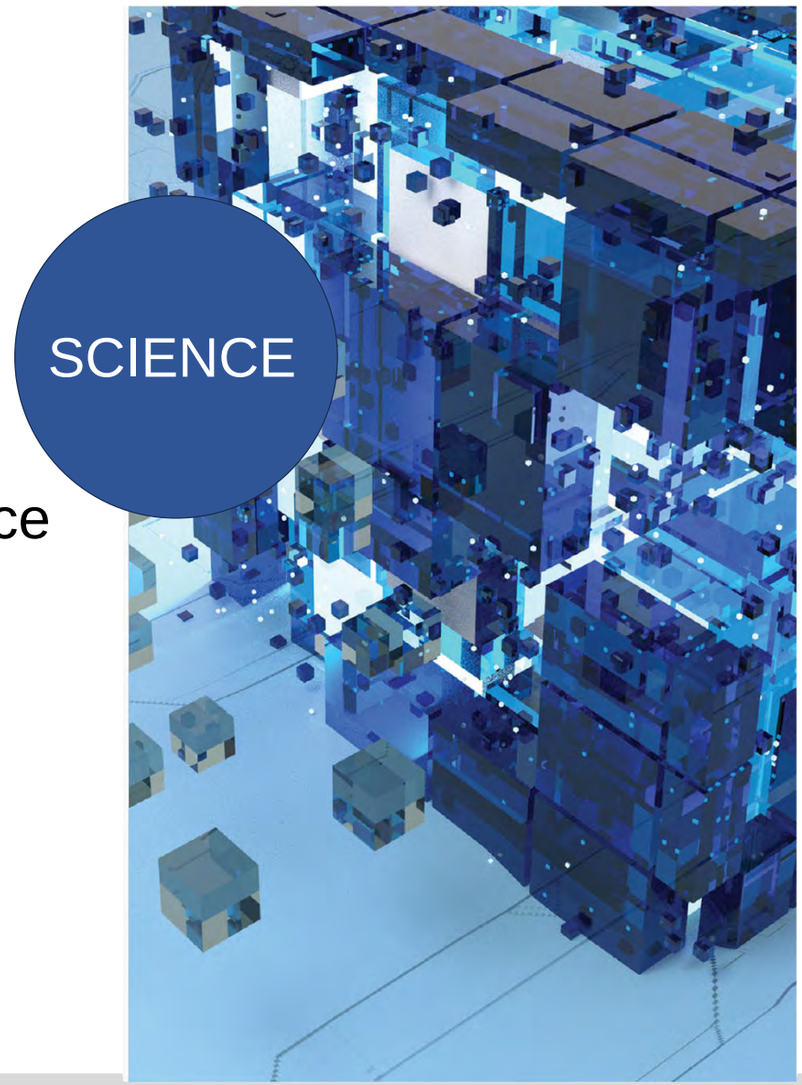
- Breakdown of traits and resistance issues
- Delivery system innovations
- These applications give growers more control over what goes on their seed
- Planter box applications open the door for biologicals that may not have been viable as seed treatments
- A lot of focus and activity in this area

Biologicals 3.0

Biocontrol Trends

Synthetic biology and AI are combining to change the way we approach product development

- Intra-species gene editing is already in place and has demonstrated the ability to improve performance
- These products are looked upon favorably by regulators
- AI has the potential to allow us to custom design peptides with high efficacy and reduced COGs
- AI is already speeding up the screening process dramatically, facilitating better and faster discovery



Biologicals 3.0

Clear Opportunities for the Channel

The science is better than ever

As a result, manufacturers' technical sales reps and advisors are more knowledgable and willing to promote biologicals than ever before

Biologicals are good for business, and expertise in biologicals can position a business for the future

Biologicals help growers customers meet the demands of their food retailer and food processors

Biologicals 3.0

Clear Opportunities for the Suppliers

Biologicals allow manufacturers to deliver science-based solutions that address unmet needs

Biologicals help manufacturers to differentiate

Biologicals help manufacturers build out their portfolios and better equip their sales team with expanded programs

Biologicals allow companies to position their brand and company as thought leaders

BPIA Efforts

Providing its members with this presentation – you are biologicals ambassadors

Communications committee launching a new Science Taskforce

Communications committee launching a new Website Taskforce

BPIA Efforts

Directory Distribution: Stakeholder Targets

Alabama Fruit & Vegetable Growers Association	California Tomato Growers Association	Georgia Fruit & Vegetable Growers Association	Iowa Soybean Association	US Senate – Virginia
Alabama Soybean and Corn Association	California Winegrape Growers Association	Georgia Organics	Iowa Specialty Crop Growers Association	WestLink AG Group
Alaska Farmer's Market Association	Central Plains Organic Farmers Association	Georgia Watermelon Association	Kansas Corn Growers Association	Valley Agronomics
Alaska Pioneer Fruit Growers Association	Colorado Corn Growers Association	Hawaii Coffee Association	Kansas Grain Sorghum Producers Association	K E Technologies LLC
American Horticultural Society	Colorado Fruit & Vegetable Growers Association	Hawaii Tropical Fruit Growers Association	Kansas Soybean Association	Wilbur Ellis
American Society of Agronomy	Colorado Nursery & Greenhouse Association	Idaho Apple Commission	Kansas Vegetable Growers Association	GS Long
American Soybean Association	Connecticut Apple Marketing Board	Idaho Grape Growers & Wine Producers Commission	Kansas Wheat Commission	Integrated Agribusiness Professionals
Arizona Cotton Growers Association	Connecticut Greenhouse Growers Association	Idaho Potato Commission	Kentucky - Organic Association of Kentucky	
Arizona Leafy Greens Food Safety Committee	Connecticut Vegetable and Fruit Growers Alliance	Idaho Wheat Commission	Kentucky Corn Growers Association	
Arkansas Grape Growers Association	Delaware Center for Horticulture	Idaho-Oregon Fruit and Vegetable Association	Kentucky Soybean Association	
Arkansas Green Industry Association	Delaware Fruit & Vegetable Growers Association	Illinois Corn Growers Association	Kentucky State Horticultural Society	
Arkansas Pecan Growers Association	Delaware Nursery & Landscape Association	Illinois Soybean Association	Kentucky Vegetable Growers Association	
Arkansas Soybean Association	Delaware Soybean Board	Illinois Specialty Growers Association	Louisiana Cotton Growers Association	
California Apple Commission	Eastern Region Soybean Board	Illinois Wheat Association	Louisiana Organic Association	
California Avocado Commission	Florida Citrus Research and Development Foundation	Indiana Corn Growers Association	Louisiana Strawberry Marketing Board	
California Certified Organic Farmers	Florida Cotton Growers Association	Indiana Nut and Fruit Growers Association	Maine Federation of Farmers' Markets	
California Citrus Nursery Board	Florida Fruit & Vegetable Association	Indiana Organic Grain Farmer Association	Maine Organic Farmers and Gardeners Association	
California Cotton Ginners and Growers Association	Florida Nursery Growers And Landscape Association	Indiana Vegetable Growers Association	Maine Pomological Society	
California Fresh Fruit Association	Florida Peanut Producers Association	International Fresh Produce Association	Maryland Grape Growers Association	
California Strawberry Commission	Florida Strawberry Growers Association	Iowa Corn Growers Association	Maryland Organic Food and Farming Association	
California Sweet Potato Council	Georgia Cotton Commission	Iowa Organic Association	Maryland State Horticultural Society	

BPIA Efforts

Directory Distribution: Stakeholder Targets

Massachusetts Cranberries, CCCGA	Missouri Soybean Association	New Hampshire Fruit Growers Association	North Carolina Cotton Growers Cooperative
Massachusetts Horticultural Society	Missouri Vegetable Growers Association	New Hampshire Nursery and Landscape Association	North Carolina Cotton Producers Association
Michigan Apple Committee	Montana - Flathead Lake Cherry Growers, Inc.	New Hampshire Vegetable and Berry Growers Assn	North Carolina Farm Stewardship Association
Michigan Blueberry Growers Association	Montana Apple Growers Association	Northeast Organic Farming Association of NJ	North Carolina Growers Association
Michigan Cherry Committee	Montana Grain Growers Association	New Jersey - Vegetable Growers Association of NJ	North Carolina Soybean Producers Association
Michigan Fruit and Vegetable Growers Association	Montana Grape and Wine Association	New Jersey Agricultural Society	North Carolina Strawberry Association
Michigan Grape and Wine Industry Council	Montana Organic Association	New Jersey State Horticultural Society	North Carolina Vegetable Growers Association
Michigan Greenhouse Growers Council	National Corn Growers Association	New Mexico Apple Growers Association	North Carolina Wine and Grape Council
Michigan Potato Industry Commission	National Cotton Council of America	New Mexico Chile Association	North Carolina Winegrower's Association
Michigan Soybean Association	National Cotton Ginners Association	New Mexico Cotton Growers Association	North Dakota Corn Growers Association
Minnesota Apple Growers Association	National FFA Organization	New Mexico Farmers' Marketing Association	North Dakota Farmers Market and Growers Association
Minnesota Fruit & Vegetable Growers Association	National Potato Council	New Mexico Wine & Grape Growers Association	North Dakota Grain Growers Association
Minnesota Grape Growers Association	Nebraska Corn Growers Association	Northeast Organic Farming Association of NY	North Dakota Grape & Wine Association
Minnesota Horticultural Society	Nebraska Grape and Winery Board	New York Apple Association	North Dakota Potato Council
Minnesota Organic Advisory Task Force	Nebraska Soybean Association	New York State Berry Growers Association	North Dakota Soybean Growers Association
Mississippi Corn Promotion Board	Nebraska Wheat Growers Association	New York State Horticultural Society	NorthEast Organic Farming Association
Mississippi Soybean Promotion Board	Nevada Farm Bureau Federation	New York State Vegetable Growers Association	Northland Potato Growers Association
Mississippi Sweet Potato Council	Nevada Grape Growers & Winemakers	New York Wine and Grape Foundation	Ohio Ecological Food and Farm Association
Missouri Corn Growers Association	Nevada Small Farms Conference	North America Blueberry Council	Ohio Grape Industries Committee
Missouri Organic Association	New England Vegetable and Berry Growers Association	North Carolina Apple Growers Association	Ohio Green Industry Association
Massachusetts Cranberries, CCCGA	Northeast Organic Farming Association of NH	North Carolina Blueberry Council	Ohio Produce Growers & Marketers Association

BPIA Efforts

Directory Distribution: Stakeholder Targets

Ohio Produce Growers & Marketers Association	South Dakota Corn Growers Association	Northeast Organic Farming Association of Vermont	Alberta Fruit Growers Association
Ohio Soybean Association	South Dakota Soybean Association	Vermont Tree Fruit Growers Association	British Columbia Blueberry Council
Oklahoma Agriculture Association	South Dakota Specialty Producers Association	Virginia Association for Biological Farming	British Columbia Greenhouse Growers' Association
Oklahoma Cotton Council	South Dakota Wheat Growers Association	Virginia Soybean Association	British Columbia Vegetable Marketing Commission
Oklahoma Horticultural Society	Southern Cotton Ginners Association	Virginia State Horticultural Society	Canola Council of Canada
Oklahoma Soybean Association	Southern Cotton Growers	Virginia Vineyards Association	Manitoba Crop Alliance
Oregon - Columbia Gorge Fruit Growers	Tennessee Farm Bureau Federation	Washington - Tilth Alliance	Manitoba Pulse & Soybean Growers
Oregon Association of Nurseries	Tennessee Organic Growers Association	Washington State Fruit Commission	Ontario Fruit and Vegetable Growers' Association
Oregon Raspberry & Blackberry Commission	Tennessee Soybean Association	Washington State Grape Society	Prairie Fruit Growers Association
Oregon Wheat Growers League	Texas A&M AgriLife Extension - Horticulture Program	Washington State Potato Commission	Prince Edward Island Potato Board
Organic Crop Improvement Association of Nebraska	Texas International Produce Association	Washington State Tree Fruit Association	Quebec Association of Fruits and Vegetables
Organic Farmers Association	Texas Organic Farmers & Gardeners Association	Washington State Wheat Commission	Quebec Farmers' Association
Organic Trade Association	Texas Pecan Growers Association	West Virginia Farmers Market Association	Saskatchewan Fruit Growers Association
Pacific Northwest Vegetable Association	Texas- Plaines Cotton Producers	Wisconsin Apple Growers Association	Western Grains Research Foundation
Pennsylvania Apple Program	Texas Soybean Association	Wisconsin Berry & Vegetable Growers Associations	
Pennsylvania Certified Organic	Texas Vegetable Association	Wisconsin Grape Growers Association	
Pennsylvania Soybean Board	Texas Wheat Producers Association	Wisconsin Organic Farmers Association	
Pennsylvania State Horticultural Association	North American Raspberry & Blackberry Association	Wisconsin Potato & Vegetable Growers Association	
Pennsylvania Vegetable Growers Association	U.S. Apple Association	Wyoming Groundskeepers & Growers Association	
South Carolina Specialty Crop Growers Association	U.S. Wheat Associates	Wyoming Wheat Growers Association	
South Carolina Tree Farm Program	United States Sweet Potato Council		

236 Domestic Stakeholder Groups

14 Canadian Stakeholder Groups

250 Total Stakeholder Groups

SCIENCE

Thank you for your kind attention.

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