Health & Bio-Pharma
Success in **HEALTH** Requires Differentiated Capabilities

- Science backed products
- Trusted & validated clinical data
- Superior regulatory & quality standards
- Strong product and ingredient brands
- Nutrition empowered by taste
Evolution of the Health Market & Industry Response

Major CPG customers are acquiring emerging brands to play in the functional space

Proactivity Toward Health

6 in 10 Consumers proactively seek added functional benefits from their everyday foods & beverages\(^1\)

37% motivated to buy a healthy lifestyle product after seeing scientific data supporting its benefits\(^1\)

11% growth in annual launches of functional foods & beverages\(^2\)

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\(^1\) Direct comparison of 2015 new product launches to 2020 new product launches. (Innova)

Source: 1Kerry Proprietary Insights | 2Direct comparison of 2015 new product launches to 2020 new product launches. (Innova)
Consumer Health & Wellness Need States

**Supplements Market**
- **Immune Health**: $16.4bn
- **Weight Management**: $16.4bn
- **Joint Health**: $11bn
- **Digestive Health**: $8.6bn
- **Heart Health**: $5bn
- **Cognitive Health**: $2.8bn

**Functional F&B Market**
- **Weight Management**: $95bn
- **Digestive Health**: $75bn
- **Joint Health**: $15bn
- **Heart Health**: $11bn
- **Cognitive Health**: $5.9bn
- **Immune Health**: $5.2bn
Partnering with Kerry – Our Holistic Approach

Customised development supported by excellence in sensory and analytical
Stability and shelf-life delivery
Excellent global infrastructure

Functional Ingredient Formulation

Science Backed Nutrition Technologies

Supply Chain Partnership

Leading portfolio with strong technology branding
Extensive trusted and validated clinical data
Expertise in nutrition science

Taste Modulation – sweetness / masking / mouthfeel
Clean label through Simply Nature

Food for Health, for Life

Process and manufacturing expertise
Leading regulatory knowledge
Holistic sustainability focus
Our Technology Portfolio & Capabilities Bring Unrivalled Value to Our Customers

<table>
<thead>
<tr>
<th>Digestive</th>
<th>Immune</th>
<th>Cognitive (Stress/Sleep)</th>
<th>Joint</th>
<th>Heart</th>
<th>Women’s Health</th>
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<tr>
<td>BG0 PROBIOTIC</td>
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<td>Sensoril®</td>
<td>HAS-II</td>
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**Digestive**
- #1 for probiotics in ambient food and beverage
- The only probiotic in the world approved by Health Canada for the prevention of AAD* and CDAD*

**Immunity**
- #1 Leading position in probiotics for women’s health
- Wellmune is the #1 clinically backed branded ingredient for immune health & support

**Cognitive (Stress/Sleep)**
- LEADING branded Ashwagandha ingredient
Market Trends in Pharma Driving Innovation

- Aging populations and rising prevalence of chronic disease
- Focus on value based medicine and sustainable healthcare systems
- Growth in vaccines
- Increasing approval and access to biosimilars
- Growth in generics across pharma-emerging markets
Kerry Pharma – Charting New Territories to Create a Healthier World

Biotechnology & Pharmaceutical Portfolio

- Customer Partnerships
- Global Market Reach
- Leading Market Positions
- Global Regulatory Knowledge
- Process Expertise

Integrated Solutions

- Oral Solid Dose (OSD)
- Vaccines
- Diagnostics
- Biologics
- Renal Disease
- APIs
- Other

Kerry Pharma solutions used in 6 out of 10 blockbuster medications

#1 position in hydrolysates for media

Top 3 excipient producer

#1 position in pharma grade acetate
Market Leading Immune Health Functional Beverage

Nutrition Empowered by Taste

Customer Need
- Consumer & category insights
- Immune support technology
- Non-GMO project verified ingredients
- Consumer preferred taste

Kerry Value Add
- Delivery system technology
- Natural extracts
- Taste expertise

Integrated Solution

Impact

Complete Functional Beverage
- Provides clinically-validated immune support plus hydration benefits
- Achieves desired taste profile
- Clean label

Our Wellmune® and Taste application expertise help deliver a better product and better process that is better for the planet
Global Partnership to deliver mastitis care innovation for breastfeeding mothers

New Category Innovation

Customer Need
- Consumer/ category insights
- Convenient delivery format
- Strong clinical validation
- Innovation at pace

Kerry Value Add
- Clinically-backed probiotic strain
- Global distribution
- Probiotic application expertise

Integrated Solution

1st Mastitis Probiotic Treatment
Patented LC40® probiotic, isolated from human breast milk, is clinically proven to reduce incidence of mastitis in breastfeeding women by 51%
Protecting the Public’s Health

Vaccinations represent the most effective strategy to prevent infectious diseases

Kerry’s cell media technology supports superior growth performance and vaccine protein expression

Kerry’s Cell Media for Vaccine Development

#1 global provider of protein hydrolysates for cell nutrition
Validated superior growth & performance
Global supply
Best in class service

Superior Cell Growth for Vaccinations

Impact

Enhanced Performance
Validated superior cell growth & viability
Improves biomanufacturing efficiencies

Public & Individual Health Protection
Preventing infection, severity of illness and spread of disease

Kerry’s cell media comprises complete media supplement systems, hydrolysed proteins, recombinant proteins and yeast extract

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Food for Health, for Life

Kerry is the Partner of Choice

- Consumer and Customer focus/insights
- Nutrition empowered by Taste
- Clinically backed technology portfolio
- Global footprint