NOMURA GLOBAL FOOD&AGRI FORUM 2020

Current and Future Food Production and Distribution

Event Date

February 13 to 14, 2020 (2 days) 9:15 a.m. to 5:00 p.m. (tentative) Venue doors open: 8:30 a.m.

Entry Fee

110,000 yen including tax, per person (via an advance reservation system)

Place

Kandamyoujin Hall EDO Culture Complex EDOCCO



E Greetings

This year, Japan entered the new era of Reiwa, as according to the Japanese calendar system. In tandem, the 2020s, a time of further expected growth and change, are now upon us. Along with this, the food & agribusiness industry is also expected to undergo significant growth and change.

Over the past 10 years in Japan in the food & agribusiness industry, we saw the growth of producers and producers being merged into corporate entities, entry into sixth industry, increased entry of companies into such industry, distribution reform and export promotion, food & agritech utilization, smart agriculture practices, and initiatives of integration with other industries. We are currently seeing the fusion of these aspects in full swing, and the growth of the industry is steadily advancing. On the other hand, many related industries outside of Japan are growing, changing, and innovating, more than what are we are seeing here in Japan domestically, and global business development is progressing. However, in the food & agribusiness industry overseas, companies in related industries are building production and sales systems not only domestically but also in other countries around the world. From production to distribution, the latest technology is actively being utilized so as to increase scale and efficiency, and sales numbers are being scaled upward via global targeting, branding, and distribution reforms.

In Spain, greenhouse cultivation has become a major base, and Norwegian seafood is being exported all over the world. New Zealand has begun to build a production system for kiwis on a global scale, and dairy farming is being automated in the Netherlands. In France, the wholesale market has expanded, and overseas expansion has begun utilizing domestic know-how. In China, distribution systems in retail business have rapidly evolved, and cooperation with production regions around the world is also progressing. Also, the world of finance has been brought to the frontlines of farmlands and forests, with this aspect expanding in Australia and Canada, and many startups are gaining traction in the United States and Israel. By raising funds all over the world, major change is coming to the food & agribusiness industry. Furthermore, in all areas of business, the SDGs and ESG investment have become global trends, thus cementing such aspects as part of the responsibility of all businesses.

Against this backdrop, the Nomura Global Food & Agri Forum 2020 is being held in the first year of the 2020s at a time when globalization and scaling up in the food & agribusiness industry is accelerating globally, and when further growth in Japan is expected, alongside initiatives such as the SDGs. For the participants of this forum, we hope that many opportunities for networking and gaining knowledge will be had via this chance to place your finger directly on the pulse of the world's most-advanced cases in this industry. This will be an opportunity for Japanese companies to make further inroads into overseas agribusiness in cooperation with global business operators. While, for business operators overseas, we hope that new business models in Japan can be developed in cooperation with Japanese producers & business operators in various industries, allowing more inroads into Japan domestically from overseas. Finally, we hope that this forum will provide a venue for productive interaction.

This forum is being held with the great support of our Gold Partners, Silver Partners, and other supporters, all believing in the great potential of the food & agribusiness industry, while striving to solve globalization and the world's social issues. With this in mind, we want to relay our gratitude to everyone that made this forum possible.

We are confident that all participants in this forum will become more active in Japan and around the world far into the 2020s.

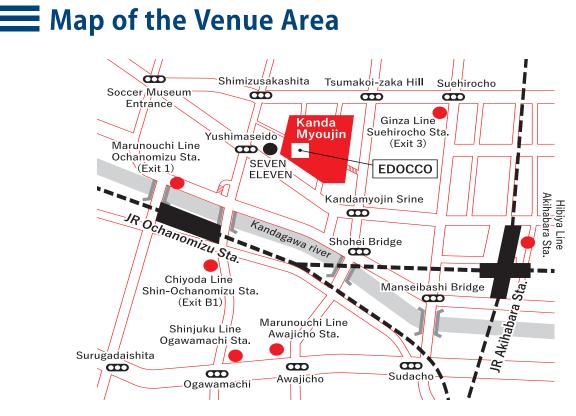
Sincerely,

Nomura Agri Planning & Advisory Co., Ltd.

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ADDRESS L'ADRESSE 地址

2-16-2, Sotokanda, Chiyoda-ku, Tokyo 101-0021

ACCESS L' ACCES 交通

*5 min. walk from "Ochanomizu" station, JR line, Hijiribashi bridge entrance*7 min. walk from "Akihabara" station, JR line, Denki-gai street entrance*5 min. walk from "Ochanomizu" station, Tokyo Metro Marunoucni-line, Hijiribashi bridge entrance*5 min. walk from "Shin-ochanomizu" station, Tokyo Metro Chiyoda-line, Hijiribashi bridge entrance



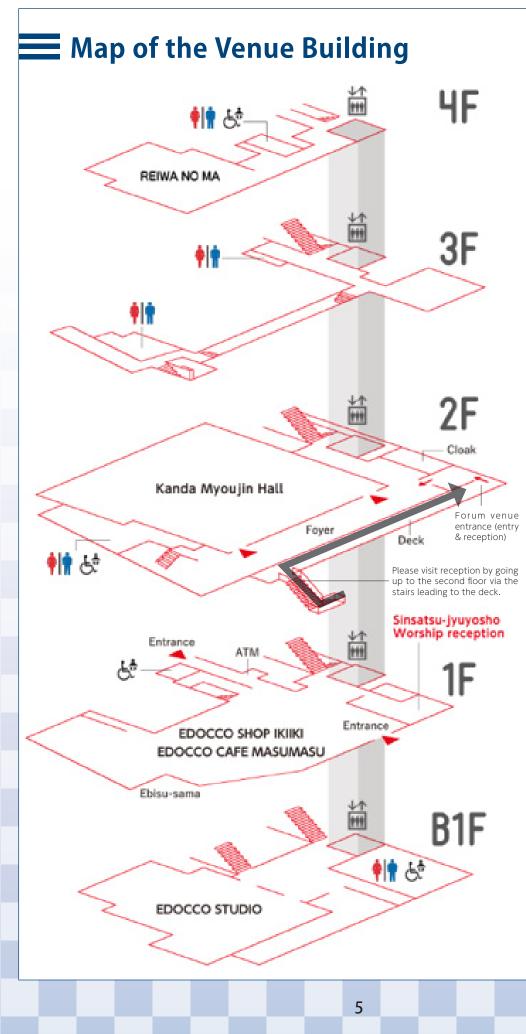


Kandamyojin Hall, Culture Plaza EDOCCO (Forum venue)



Zuishin-mon

Precinct map of Kanda Myojin Shrine





Hall 3, Reiwa Room (4F) This venue will host mainly panel displays for Silver Partners, along with a networking space for speakers and participants.



Hall 1, Kanda Myojin Hall (2F) This hall will provide a space for presentations and panel discussions by speakers from overseas and for Gold Partners. (Capacity: Approx. 360 people)



Howaie (2F) This space will host panel exhibitions from Gold Partners, along with functioning as a networking space.



Hall 2 EDOCCO STUDIO (B1) This hall will host speakers from overseas and Gold Partner presentations, along with panel discussions and startup pitch events. (Capacity: Approx. 140 people)

🗮 Main Lecture Schedule

First day, morning, Feb. 13, Hall 1



Spain



Almeria Agriculture Development and CASI Solutions

アルメリア大生産拠点の発展と CASI のソリューション(予定)



Keynote speech (tentative)

Cooperative Agricola San Isidro (CASI) CEO

Antonio Domene

Lectures (tentative)

"Ichinen Holdings' Agricultural Initiatives and Strategies," by Masashi Kuroda (President, ICHINEN HOLDINGS CO., LTD.)

Panel discussion themes (tentative) Bases of facility cultivation and points of growth

Panelists (tentative) Antonio Domene, Masashi Kuroda, Taizo Sano (Directors COO, SARA Inc.)

Moderator (tentative) Hirokazu Kiuchi (President , "Wagoen" Agricultural producer's co-operative corporation and Advisor/NAPA)

The Almeria region in southern Spain historically was not suitable for agriculture due to water scarcity and strong winds, and 95% of the land here was thus deserted until the 1960s, but it is now home to over 30,000 ha of plastic greenhouses, agricultural companies, and research institutions, thus transforming the area into a large production base, such as for tomatoes, peppers, and cucumbers. Agricultural cooperatives are supporting this transformation and growth, and they provide guidance on production, technological innovation, collection, and market development, and are working on furthering this growth in collaboration with agricultural technology companies and the University of Almeria. Many producers have introduced agricultural ICT and have obtained Global G.A.P. certification, and exports are expanding. CASI, is an agricultural cooperative in Almeria, handling the area's largest volume of tomatoes.



First day, afternoon, Feb. 13, Hall 1



NORWEGIAN SEAFOOD COUNCIL

Seafood in a global context – consumer insights and sustainable solutions

グローバルな視点から見たシーフード ~ 消費者インサイト とサステナブルソリューション



Keynote speech (tentative) Norwegian Seafood Council

Director Japan & Korea Gunvar L. Wie

Gunvar L. Wie has since 2016 been the Director for the Norwegian Seafood Councils offices in Japan and Korea. The main activities for NSC is market analysis, marketing and communication for Norwegian seafood in the markets. Wie is a marketing professional with over 20 years of experience in the F&B industry. Prior to joining NSC he was the Commercial Director for Fazer Food Services, Norwegian branch.

Lectures (tentative) "Mitsui & Co.'s fisheries business and sustainability," by Tomonori Sekiguchi (General Manager, Fisheries Project Dept. Livestock & Fisheries Project Div. Food Business Unit)

Panel discussion theme (tentative) Sustainability and the potential of aquaculture

Panelists (tentative) Gunvar L. Wie Tomonori Sekiguchi

Keitaro Kato(Professor, Fisheries Laboratory, Kindai University)

Moderator (tentative) Shinji Kubota (Senior Consultant at Consulting Department/NAPA)

Norway is a seafood nation with a population of about 5.25 million and a land size that is equivalent to Japan. Norway is the world's second largest exporter of seafood, providing 37 million daily meals of seafood to 146 countries across the globe. The Norwegian model

of seafood production where industry, research and government works together has been acknowledged as best practice, and we are renowned across the world for the sustainable management of wild fisheries and responsible aquaculture production. The Norwegian Seafood Council (NSC) works together with the Norwegian fisheries and aquaculture industry to develop markets for Norwegian seafood and a core part of the work is to conduct in depth market studies, like the yearly seafood consumer study with more than 25,000 respondents across 25 markets.



China

Alibaba

Freshippo - Alibaba's new retail practice of transforming commerce with technology

盒馬鮮生 - テクノロジーで商取引を変革するアリババの新しい小売業



Keynote speech (tentative)

Hema Fresh 盒馬鮮生 (Alibaba's Hema Fresh) Merchandising General Manager

Beta Cong Sheng

Beta Cong Sheng is General Manager of Hema Fresh Merchandising. Prior to her current role, she served as Hema Chief Financial Officer since May 2016. Prior to joining Hema, Beta served as Financial Director of Semiconductor International Manufacturing Corporation and a senior executive of Ernst & Young Audit and Advisory Business Service Division in Shanghai.

Panel discussion theme (tentative) Food and agribusiness as required during the course of China's retail transformation

Panelists (tentative)

Beta Cong Sheng Hiroshi Kawasaki (President and CEO, NAX JAPAN Co., Ltd.) Du Peng (Director, Product Development Department, COFCO Japan Co., Ltd.) Chengdu Retailers Business Association

Moderators (tentative) Zhou Xuan(Chief consultant & Chief researcher at Consulting Department/NAPA)

China, the world's largest B-to-C e-commerce market, is undergoing distribution reforms, and Alibaba, the country's largest e-commerce company, is working on new retail styles that combine e-commerce and brick-and-mortar locations. Hema Fresh, a subsidiary of Alibaba, uses a physical store as a delivery base and develops a service that delivers groceries within a minimum of 30 minutes if an order is received from a home within a 3 km radius via a smartphone. After opening its first store in 2015, the company has already planned to expand from over 150 stores to 2,000 stores within the next few years. On the other hand, in terms of procurement, cooperation with producers in Norway and New Zealand has been strengthened.



First day, morning, Feb. 13, Hall 2

Israel ¢



Israeli agrifood tech innovation: how to create a successful eco-system

イスラエルのアグリフードテック イノベーション~エコシステムの創り方~



Keynote speech (tentative)

Trendlines Agrifood Pte. Ltd. **VP Business Development**

Sarai Kemp

Since 2012. Sarai Kemp has been Vice President of business development at Trendlines Agtech, where she oversees support for the business development of startups that develop innovative technologies and products in aquaculture, crop protection, precision pesticides, food technology, and funding strategies.

Panel discussion theme (tentative) Innovation required in the field of food and agriculture

Panelists (tentative)

Sarai Kemp Wang Yan (Executive Vice President of Asset Management Company, CIC Capital Corporation) Dan Steere (Co-Founder and CEO, Abundant Robotics)

Moderators (tentative) Norishige Hayakawa (CEO of Hagaminomori Design, and Fellow/NAPA)

Israel, which has a population of about 8.7 million and a land area similar to that of Japan's Shikoku Island, has been engaged in "programming education" ahead of other countries and is now one of the world's leading and advanced IT-focused countries, with many startups recently being established. These startups are premised on global expansion, and many startups are focusing on the agri field. Among them, The Trendlines Group is an incubator and venture capital firm focusing on startups with innovative technologies in Israel's medical and agricultural fields. Two companies, Trendlines and Trendlines Labs, which are government-funded incubators, are part of The Trendlines Group's investment portfolio. In addition, The Trendlines Group has offices in Singapore and China, and is developing efforts toward incubation on a global scale.



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New Zealand

Zespri Global Brand & Growth Strategy

ゼスプリのグローバルブランドと成長戦略(予定)



Keynote speech (tentative) Zespri Fresh Produce (Japan)K.K. Asia Regional Manager

Nick Kirton

After graduating from the University of Victoria, Nick Kirton worked in the New Zealand government in various policy areas including as a consultant to ministers and in negotiations on free-trade agreements. From 2014, at Zespri, he led negotiations with the New Zealand government and gave supply chain demonstrations in China. He was appointed Asia regional supply manager in 2019 to oversee kiwi production and supply chains in Japan and Korea

Panel discussion topic (tentative) Global development and branding strategy

Panelists (tentative)

Nick Kirtow Hiroshi Sakurai (Chairman , Asahi Shuzo Co.,Ltd.) Takashi Kagami (General Manager , Business Transformation Division, DENTSU INC.)

Moderators (tentative) Norishige Hayakawa (CEO of Hagaminomori Design, and Fellow/NAPA)

In New Zealand, where the population is about 4.7 million, kiwi production began in the early 1900s, and the number of exporters increased in the late 1980s. When price competition started, Zespri worked to unify the export contact point and established an operation and marketing organization. In 1997, the export-only brand name became "Zespri." Zespri kiwis are currently produced on 13,500 ha of farmland and are exported to more than 59 countries, accounting for half of New Zealand's agricultural exports. At farms, license management is performed using drones, and shipping from the farm to the storefront is managed via a strict system called the "Zespri System." In addition, the company is working on local production in Italy, France, and Japan, etc., managing breeding rights and trademark management at its headquarters in New Zealand, and is working on building an annual supply system for kiwis under the same brand value worldwide.











Second day, afternoon, Feb. 14 Hall 1

Netherlands

Bright farming in the Netherlands — Making farmers' live easier with innovative solutions and tailored services -

オランダの有望な牧場経営 ~革新的なソリューションとカスタマイズサービスによる生産者の負担軽減~



Keynote speech (tentative)

Lely Holding S.à r.l. **Director Business Development**

Owner of "De Dobbelhoeve" Organic **Dairy Farm**

Guus van Roessel

Lectures (tentative) "LED Farm' - a new business model of plant factory using LEDs as a lighting source for plants. by Hiroyuki Watanabe (Professor, Assistant Dean for Department of Advanced Food Sciences College of Agriculture, Tamagawa University) "Operation of and prospects for agricultural drones," by Yoshiki Okada (AGRICULTURAL DRONE DEPT & ACCOUNT MANAGER at DJI JAPAN Co., Ltd.

Panel discussion theme (tentative) Potential of smart agriculture and increasing the productivity of such

Panelists (tentative) Guus van Roessel, Hiroyuki Watanabe, Yoshiki Okada

Moderator (tentative) Yuki Ishii (Assistant Chief Researcher at Research Department/NAPA)

The land area of the Netherlands is almost the same as Kyushu in Japan, but the country is the second-largest exporter of agricultural products in the world (export value of over 10 trillion yen). Such growth is supported by high productivity using technology at a large scale, with automation. Above all, herbivorous livestock management of dairy cattle and beef cattle accounts for more than half of the Dutch farm management bodies, and technology is heavily being used, especially in dairy farming. Lely is providing machines and systems that can help realize a sustainable and profitable dairy business that contributes to efficient farm management. Lely not only sells machines but also supports startups that start new dairy farms, and it promotes automation to the extent that such can be managed as a side business.









Innovation, Growth and Global Development of Rungis (TBD)

ランジス国際卸売市場のイノベーション・成長とグローバル展開(予定)



Keynote speech (tentative) Marché International de Rungis SEMMARIS

Executive Director **Benoit Juster**

Benoit Juster is an expert in the real estate and infrastructure fields and has been involved in large-scale development projects since 2010 as CEO of EGIS Conseil. After that, he joined the SEMMARIS Strategic Committee and now oversees the planning and construction departments.

Panel discussion theme (tentative) Strategies required for the wholesale market and future possibilities thereof

Panelist (tentative) Benoit JUSTER Mitsuo Fujio (President, SHINMEI Co., LTD.) Kota Kanemitsu (Director , Narita Wholesale Market)

Moderator (tentative) Masayuki Sato (Director & Managing Director at Consulting Department/NAPA)

France's Rungis International Market, the world's largest food wholesale market, was relocated and opened in 1969. Its sales have increased by 13% in 2015, compared with 2010, at a handling volume of EUR 8.9 billion, with plans to invest more than EUR 1 billion from 2015 to 2025, etc. The company continues to grow. Underpinning its growth is SEMMARIS, a semi-governmental and private-sector company, that is developing a consulting and licensing business in Dubai, etc., where Rungis design, operation, trademark, and software is packaged. In order to provide practical solutions to in-market operators, the company is working on the growth of the wholesale market, including the creation of an innovation department and the development of innovative projects, etc.



Second day, morning, Feb. 14 Hall 2

North America/Australia

Institutional investment in farmland

機関投資家の農業投資



Keynote speech (tentative)

Hancock Natural Resource Group Australasia Pty Limited Director, Institutional Business, Asia Pacific

Nick Ping

Nick Ping is an expert in forest science and has been engaged in forest evaluation and strategy development after working in business development and resource management in Australia. He is currently responsible for Hancock Natural Resource Group's institutional business development and customer management in the Asia-Pacific region.



A Manulife Investment Management Company

Panel discussion theme (tentative) Needs for farmland and forest investment and the future possibilities thereof

Panelist (tentative)

Nick Ping Kazushi Saito (President , Shonai Kome Koubou Corporation) Toru Hayami (President , Hayami Forest)

Moderator (tentative)

Satoshi Endo (Executive Manager at Planning Department/ NAPA)

Investing in and operating farmlands and forests is becoming more common against the backdrop of increasing food demand due to global population growth and increased consumption, along with increased momentum for solving social issues such as ESG investment and SDGs, etc. Among the entities involved in this field, Hancock Natural Resource Group, which manages real assets under Canada's

Manulife Asset Management, operates funds that invest in farmlands and forests. Its farmland fund, launched in 1990, invests approximately \$3 billion in about 380,000 acres (approximately 150,000 ha) of farmland in North America and Australia, and the company has become the largest farmland investment management company in North America. Invested farmland secures profits by renting farmland and selling produced agricultural products while giving consideration to sustainable development. In terms of forest investment, the company manages about 5.7 million acres (about 2.3 million ha) in North America, Oceania, and Chile, making it the largest forest investment management company in the world.



9

Startup pitching/business contest

This forum presents pitches from about 20 startups and businesses recommended mainly by Gold Partners and Silver Partners. Each presentation is six minutes in length, and an awards ceremony will be held after the questions by the judges (tentative). The startups and operators that will take the stage aim to develop new business models, technologies, and solutions mainly related to the food and the agri field, aiming for global expansion in the future. The names of the speakers will be posted on the internet after being posted on the forum's website (scheduled for November to December 2019).



Second day, afternoon, Feb. 14 Hall 2

Advanced technology, business related to scaling



Keynote speech (tentative) Co-Founder and CEO

Dan Steere

Abundant Robotics has developed an apple-harvesting robot that is independent of the Stanford Research Institute, the world's largest research institution. Google Ventures and others have invested in Abundant Robotics, and the robot has been deployed globally, such as being introduced at an apple orchard in New Zealand.



(tentative) CEO Sonia Lo

Crop One Holdings was founded in the United States in 2014 and operates a plant factory business. Global expansion has begun, including in the establishment of a joint venture, to create Emirates Airline Catering, along with the world's largest plant factory in Dubai.

CALYSTA.

Keynote speech (tentative) Vice President Market Development

Allan LeBlanc

Calysta is a biotechnology company based in Silicon Valley, California, that develops and manufactures protein components from new sources. Its first product, FeedKind[®], is a sustainable alternative to fish meal and soy protein concentrates used in aquaculture and livestock breeding, producing fermented natural gas and producing protein with little use of water or farmland.

Lectures and panel discussions on technology companies that have developed advanced technologies in the United States and that are expanding globally; a presentation at Hall 1 is also planned.

Lecture (tentative) Dentsu food(x) by Misato Mikami (Business Designer, Opportunity Business Design, DENTSU INC.)

Opportunity Business Design, DENTSU INC.)
Panel discussion theme (tentative)

Advanced technologies that can change food and agribusiness

Panelist (tentative) Dan Steere Sonia Lo Allan LeBlanc Misato Mikami

Moderator (tentative)

Mitsuyasu Sato (Managing Director at Research Department/NAPA)

Networking Overview

Hall 3 will be available for use as a networking area for speakers from overseas, startup pitch speakers, etc., and for participants of the forum. Speakers from overseas and startup pitch speakers will be able to network together with participants at Hall 3 at a predetermined time.

Detailed networking periods will be announced in the program distributed on the day of the forum.

There will also be a mini gathering and a question corner held at Hall 3.

At Howaie, on 2F, a panel introducing the efforts of the Gold Partners will on display, while a panel introducing the efforts of the Silver Partners will be exhibited at Hall 3.



Howaie (2F)

Hall 3, Reiwa Room (4F)



Outside Terrace at Reiwa Room

Points to Note

Programs and Handouts

A detailed program for this forum will be distributed on the day of the event.

Please note that the speakers and programs described in this booklet are subject to change without notice. Since this forum will host lectures and talks at multiple venue locations at the same time, it is necessary for attendees to pre-register (with limits on capacity) via the forum's website by around November or December, in order to ensure smooth operation. Attending lectures/talks without preregistration is generally not permitted, but if vacant seats arise after a lecture starts, we will allow entrance according to a queue. Please note that even if you have registered for a lecture in advance, you will not be allowed to take your seat if did not enter the lecture venue before the start of the lecture.

On the 1st and 2nd day, the lectures at Hall 1 and Hall 2 will feature simultaneous interpretation in Japanese and English. Light meals are prepared for lunch on the first and second days. On the first day, there will also be a cocktail party at the end of the day's programs.

Admission, various precautions to be aware of at the venue, items related to venue access

This forum can only be attended by those that have applied in advance. If you have not registered in advance, you will not be allowed to enter.

All attendees will be issued a neck strap that will allow access to the venue. Thus, if you do not have the neck strap on when entering/reentering the venue, you will not be allowed to enter.

Audio recordings, video recordings, duplications, modifications, diversions, distribution to third parties, and all forms of unauthorized reproductions, etc., of the lecture contents are prohibited.

Various media interviews and filming sessions will be held/conducted at the venue. In such a case, please note that all attendees may be recognizable in such broadcasts.

Please also note that children under elementary school age cannot participate or enter.

As no parking facilities are provided, it is recommended that all attendees arrive at the venue via public transportation.

When at the venue, please follow the instructions of venue staff. If you conduct yourself in a manner that causes a disturbance to other attendees, you may be asked to leave.

Attendees are responsible for managing their own belongings and valuables while at the venue.

Other Points to Note

The personal information provided when applying for this forum in advance will be administered by Nomura Agri-Planning & Advisory Co., Ltd. (the organizer) and Nomura Holdings, Inc., which is the holding company of the organizer, and such information will be used for the operation of this forum and for receiving the attendees.

In the case where the event is canceled due to a disaster or other unforeseen circumstances, we will post such information on the forum's website.

Main Program Overview Feb. 13 Hall 3 / Howaie Hall 1 Hall 2 Networking, panel displays, Spain Israel (agriculture and facility mini-sessions and round-Morning (startup investment) cultivation) table discussions Lunch Networking Norway Afternoon 1 (fisheries and aquaculture) Networking, panel displays, Startup pitching, business mini-sessions and roundcontests table discussions China Afternoon 2 (downstream distribution) Evening Networking Hall 1 Feb. 14 Hall 2 Hall 3 / Howaie Networking, panel displays, North America/Australia New Zealand Morning mini-sessions and round-(farmland funds) (fruit trees/branding) table discussions Lunch Networking **The Netherlands** Afternoon 1 (dairy farming/automation) Advanced technology, things Networking, panel displays, related to scaling business mini-sessions and round-(agritech/food tech) table discussions France Afternoon 2 (wholesale distribution)

Method of application for participants

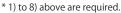
Please fill in the necessary information and send it to the Nomura Global Food & Agri Forum 2020 organizer (Nomura Agri Planning & Advisory Co., Ltd.) via the following e-mail address.

Contact (e-mail): globalforum-rj170017@jp.nomura.com

Subject: Nomura Global Food & Agri Forum 2020 (Hoping to Participate)

Main information: 1) name; 2) name in Japanese kana; 3) date of birth; 4) organization/company name;





* Please note that, depending on the eventual status of your application, we cannot ensure that your seat will be available.

* After applying by e-mail, the office of the organizing secretariat will prepare your seats in about a week, and if the seats are able to be provided, further procedures and the payment of the participation fee will be required. You will be contacted with further instructions via e-mail.

* We will contact you from the e-mail address of globalforum-rj170017@jp.nomura.com, thus please make sure that your e-mail inbox's spam settings, etc., are configured to receive contact from e-mail addresses using the "@jp.nomura.com" domain.

Contact info

Organizing Secretariat of Nomura Global Food & Agri Forum 2020 Nomura Agri Planning & Advisory Co., Ltd. Otemachi Nomura Building 22th Fl, 2-1-1 Otemachi, Chiyoda-ku, Tokyo, Japan 100-8170 TEL: 03-3281-0780 E-mail: globalforum-rj170017@jp.nomura.com



