

A person wearing a cap and dark clothing is crouching in a field of young corn plants. The sun is low on the horizon, creating a warm, golden glow across the sky and field. The foreground shows rows of small green plants in dark, cracked soil.

Fertilizer Industry Round Table: Disruptive Forces in Crop Nutrition

Jim Prokopanko
CEO, The Mosaic Company





Megatrends as Disrupters

- Megatrends defined:
 - Social, economic and political developments that slowly, steadily and permanently impact our markets and industries over the long run.

Megatrends: Potential Disrupters to Fertilizer Industry

Urbanization



Agricultural commodity price volatility



Precision agriculture, smart devices and robots



Water scarcity and pricing



Availability of arable land



Energy supply, demand and prices



Mineral scarcity



Development of next generation biofuels



Increasing value of agricultural services



Population and income growth in rapidly developing economies (RDE)



Africa enters the global economy



Agricultural innovation and technical change



Closing the yield gap in developing countries



GMO crops with innovative input and output traits



Megatrends Driving Food and Energy Demand

Energy supply,
demand and prices



Population and
income growth in
rapidly developing
economies (RDE)



Africa enters the
global economy



Urbanization





Megatrends with Potential to Boost Food Production

Closing the yield gap in developing countries



Africa enters the global economy



Increasing value of agricultural services



GMO crops with innovative input and output traits



Agricultural innovation and technical change



Precision agriculture, smart devices and robots





Megatrends Pose Challenges to Feeding the World

Water scarcity
and pricing



Availability of
arable land



Mineral scarcity



Agricultural
commodity price
volatility





Biotech: Achieving Promises of the Technology

**GMO crops with
innovative input
and output traits**



Megatrends Drive Mosaic's Strategy

OUR MISSION:
We help the world grow the food it needs 

OUR VISION:
 **To be the world's leading crop nutrition company**

OUR STRATEGIC PRIORITIES

1 PEOPLE
Invest in talent and development so that Mosaic is known as a company where people want to work and grow

2 GROWTH
Grow our production of essential crop nutrients and operate with increasing efficiency

3 MARKET ACCESS
Expand our reach and impact by continuously strengthening our distribution network

4 INNOVATION
Build on our industry-leading product, process and sustainability innovations

MOS SHAREHOLDER VALUE
Deliver strong financial performance and provide meaningful returns to our shareholders

OUR VALUES:

- 1 INTEGRITY**
We are open, candid and professional. We hold ourselves accountable for our promises and actions, and we are committed to the highest ethical standards.
- 2 EXCELLENCE**
We push to achieve high standards for our customers, shareholders and co-workers. We are relentless in our pursuit of an injury-free workplace. We recognize that we can always improve.
- 3 SUSTAINABILITY**
Lasting success comes from making smart choices about our stewardship of the environment, how we engage our people, and how we manage resources.
- 4 CONNECTIVITY**
We are better together than as individuals. By working in collaboration across mines, facilities and offices, we will enhance our individual and collective performance.

