

# ISN'T IT TIME to see things differently?

DeLaval company presentation



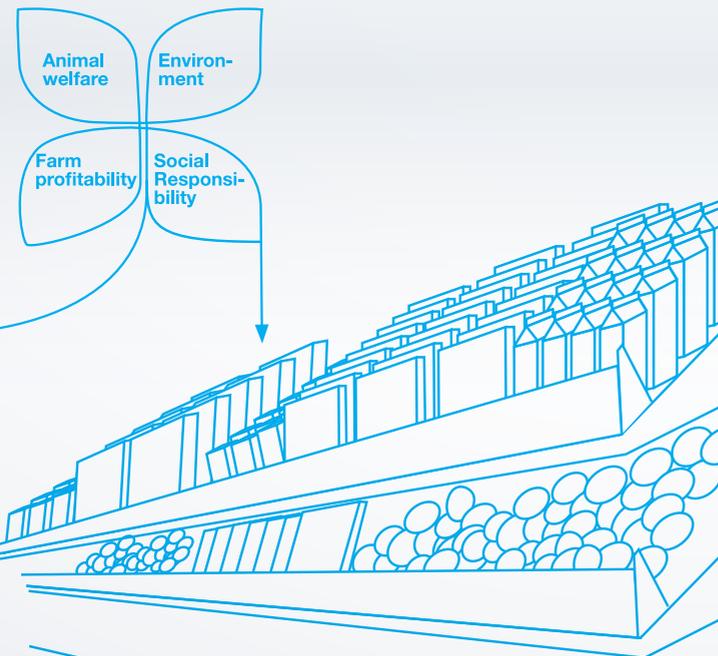
# SOME SEE A CHALLENGE We see opportunities

At DeLaval we believe that food production should be sustainable. By this we mean reducing the environmental footprint of farms, while improving food production, farm profitability and the well-being of the people and animals involved. Or, put another way, to increase resource efficiency and do more with less.

We believe this is a necessity based on the current challenges faced by our industry as a whole. As part of a value chain that needs to increase productivity to ensure food safety and security for 7 billion

people – a number that is expected to touch 9 billion by 2050 – it is our responsibility to strive to meet these challenges in a sustainable manner.

When it comes to improving sustainability of dairy farming we are currently focusing on six areas – feed, animal health, manure, energy, water and working conditions – where we feel we can make a difference to the overall sustainability of dairy farms.



No matter how hi-tech a solution is, it has to provide benefits for a farmer, contributing to herd health, increased milk yield and profitability, while having as little impact as possible on the environment.

Milk contains 18 of the 22 nutrients we need on a daily basis.

The Food and Agricultural Organization of the United Nations (FAO) has identified three main actions to reduce greenhouse gas emissions on dairy farms: improve herd management, manure management and feed efficiency.

Our focus has never changed



Our founder, Gustaf de Laval, was not only an outstanding inventor he was a man who saw no limitations. He was convinced it was possible to improve the working conditions on farms through technology. He believed, as we do today, that it is possible to make a difference.

Since the foundation of AB Separator in 1883 we have served farmers, focusing on improving their productivity and profitability.

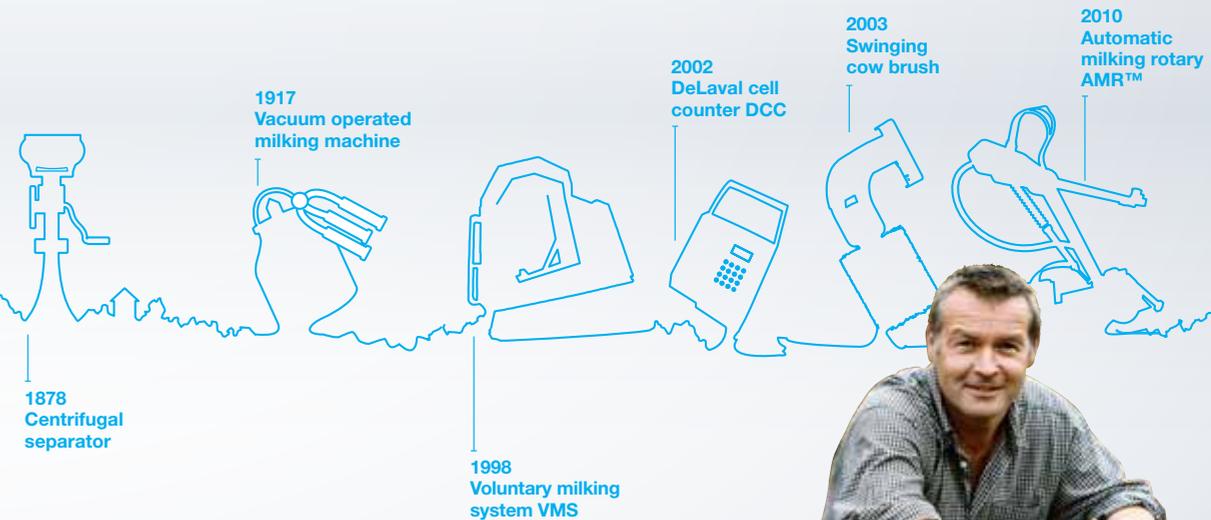
# SOME SEE THE PAST We see the future of dairy farming

Some manufacturers go to exceptional lengths in order to understand their customers. At DeLaval we have kept the very same dairy farm that our founder opened in 1894, fully operational. Hamra Farm, and the thousands of international guests who visit it every year, have given us a unique perspective on dairy farming and the daily challenges that farmers face.

This farming experience is applied throughout all our operations. For instance, many DeLaval products, services and systems are tried and tested at our farm before being launched. And because the farm is located on site at DeLaval headquarters, our

design engineers can follow tests and trials closely, discussing performance and other factors with the farmers and taking onboard any suggestions that can help to deliver optimal results.

Furthermore, what was instrumental to our success in the early days, and helped us to become a global supplier, is still just as important today – to deliver the best results for farmers we have to combine the latest technology with the complexities of farming. This philosophy has enabled us to achieve unique results, delivering everything from the world's most efficient cow brush, to the world's most advanced automatic milking system.

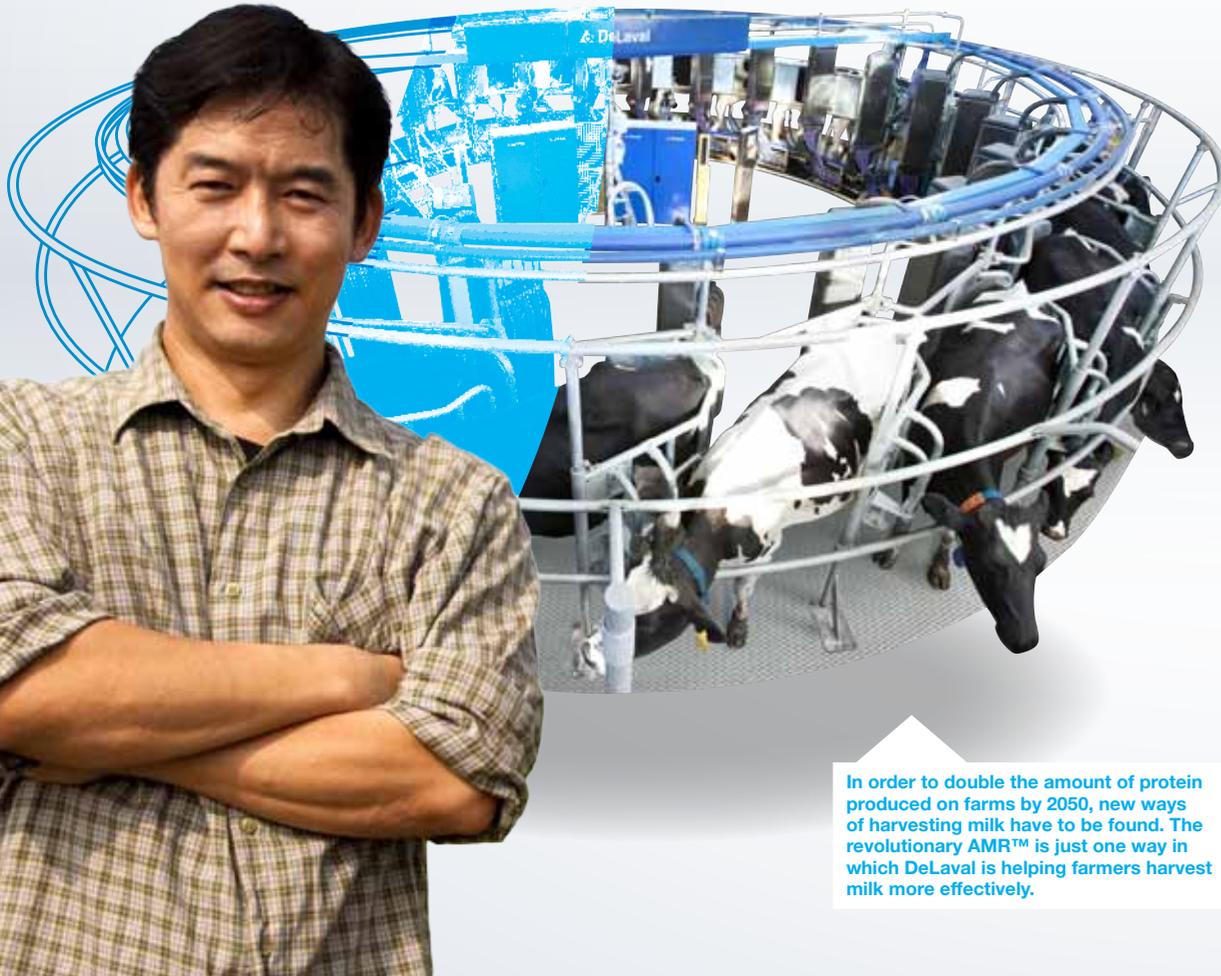


Hamra farm, opened in 1894 by Gustaf de Laval, currently produces 12,000 kg of milk per cow and year.



Innovation is our strength

# SOME SEE NUTS AND BOLTS We see innovations that simplify dairy farming



In order to double the amount of protein produced on farms by 2050, new ways of harvesting milk have to be found. The revolutionary AMR™ is just one way in which DeLaval is helping farmers harvest milk more effectively.



Conservative estimates put the savings on offer with Herd Navigator technology at up to 250 euros per cow, per year.

Our innovations are born from meeting thousands of farmers every day – it's the insights they provide us that are interpreted into solutions that make farmers' lives easier and more profitable.

When we launch a new product, service or initiative, it's because it will have a positive impact on the operations of a farm. This was the case when we developed our first revolutionary solution in 1878 and it's still the case today. This is clearly highlighted with AMR™ and Herd Navigator™, just two of many outstanding solutions that are revolutionising dairy farming.

AMR™, the world's first Automatic Milking Rotary, takes away much of the mundane work involved when milking cows, improving the working lives of all those involved at the farm and freeing-up time for farmers to focus on effective farm management. Herd Navigator™ is an early detection system for the herd. By analysing milk it identifies any cows that are sick or on heat well before it's noticeable with the naked eye.



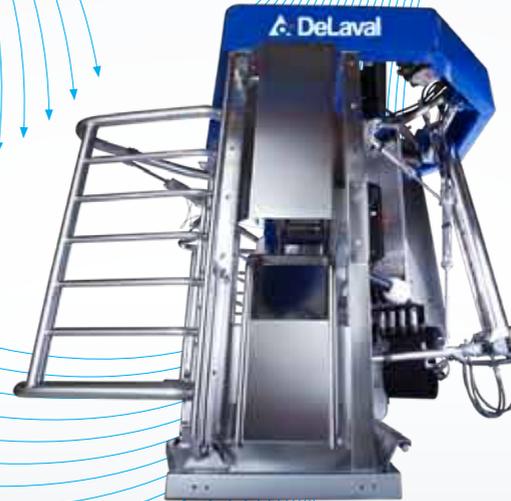
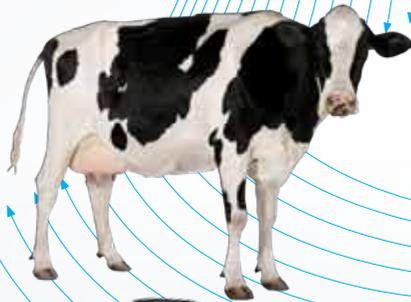
The swinging cow brush helps keep cows healthy, productive and content on the farm. Since launching the world's first swinging cow brush in 2003, over 45,000 of them have been sold around the globe. Today, over 5.4 million cows' backs are scratched daily with one.

Everything is integrated



DeLaval feeding wagon

DELPRO™  
FARM  
MANAGER



DeLaval VMS®



Herd Navigator™ by DeLaval



DeLaval hoofcare



DeLaval milk filters



DeLaval cooling tank

Every day around 16 million litres of milk are harvested with DeLaval VMS stations around the world.

The adoption of existing and emerging innovation to dairy production can help accelerate milk productivity to align population and demand growth. 2011 World Livestock Report issued by the U.N. Food & Agriculture Organization, FAO.



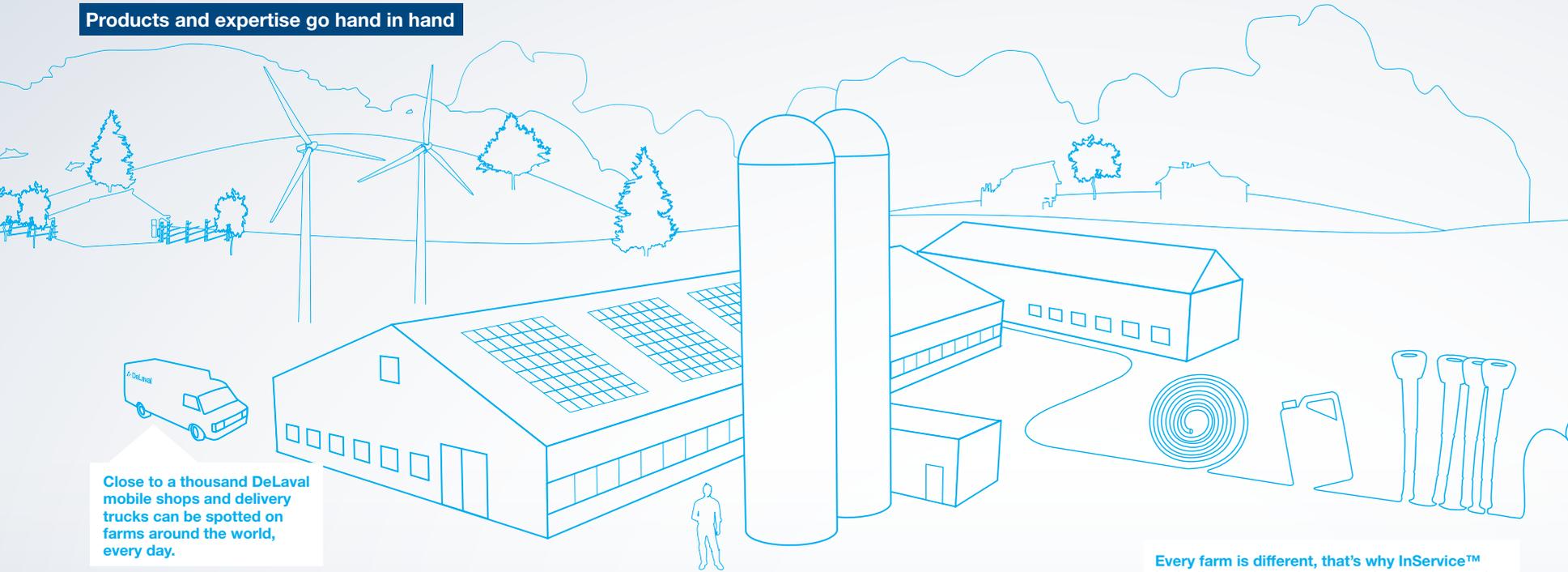
**SOME SEE  
EQUIPMENT**  
**We see farm  
management**

**At DeLaval we have always had a holistic view of dairy farming. This means going beyond looking at a simple process or operation to see how everything on the farm is integrated.**

The result of this can be best witnessed in our smart farming systems which are being rolled out step-wise over the coming years. Smart farming enables the different elements within milking, feeding and the barn, to speak to one another in order to create the optimal environment for cows and ultimately maximise milk yield and profitability.

And that's just on the farm, in the future, different stakeholders, such as veterinarians, nutritionists, service engineers, farm management experts, and dairy processors, will all be able to remotely connect to the system to deliver services that will further enhance the farming operation. With this in place, food production can become a truly connected business.

Products and expertise go hand in hand



Close to a thousand DeLaval mobile shops and delivery trucks can be spotted on farms around the world, every day.

# SOME SEE A FARM We see a unique situation and ways to improve farmers' lives

Improving farmers' lives involves embracing modern technologies, while having a comprehensive understanding of modern farming techniques.

At DeLaval we have specialists in everything from chemical and composite materials to robotics and IT management, system engineering, manure, feeding and veterinary science. Together with our teams in the field our onsite experts are responsible for developing everything from cooling systems to detergents, hoof disinfectants, teat dips, milking liners, and many more products that help optimise daily farming operations.

Supporting customers does not begin and end with products. Optimising operations and improving the working lives of our customers is also about

ensuring the equipment is properly serviced by certified engineers as well as identifying ways to enhance the user experience, whether it's through a remote app or user-friendly software.

As farming is such a unique business, with an endless number of factors that can impact operations – from climatic conditions to the frequency and type of feed that animals are fed – we also offer specialised advisory services. With experience from supporting farmers around the globe, our consultants are experts in helping farmers do more with less, while protecting the health of the herd.

Every farm is different, that's why InService™ is flexible: so it can be customized to the needs of your farm and the way you run it. InService™ consists of five packages.

InService™  
Milking

InService™  
VMS®

InService™  
Cooling

InService™  
Feeding

InService™  
Manure



Together we make sustainable food production possible

# SOME SEE A CUSTOMER We see a fellow farmer

WE ARE WHERE YOU ARE. Our solutions are used by dairy farmers around the globe every day.

As a leading supplier of solutions for professional food producers, we offer you products, systems and services for all steps of milk production.

Don't take our word for it – read a selection of dairy farmers testimonials on [www.delaval.com/meetourcustomers](http://www.delaval.com/meetourcustomers)



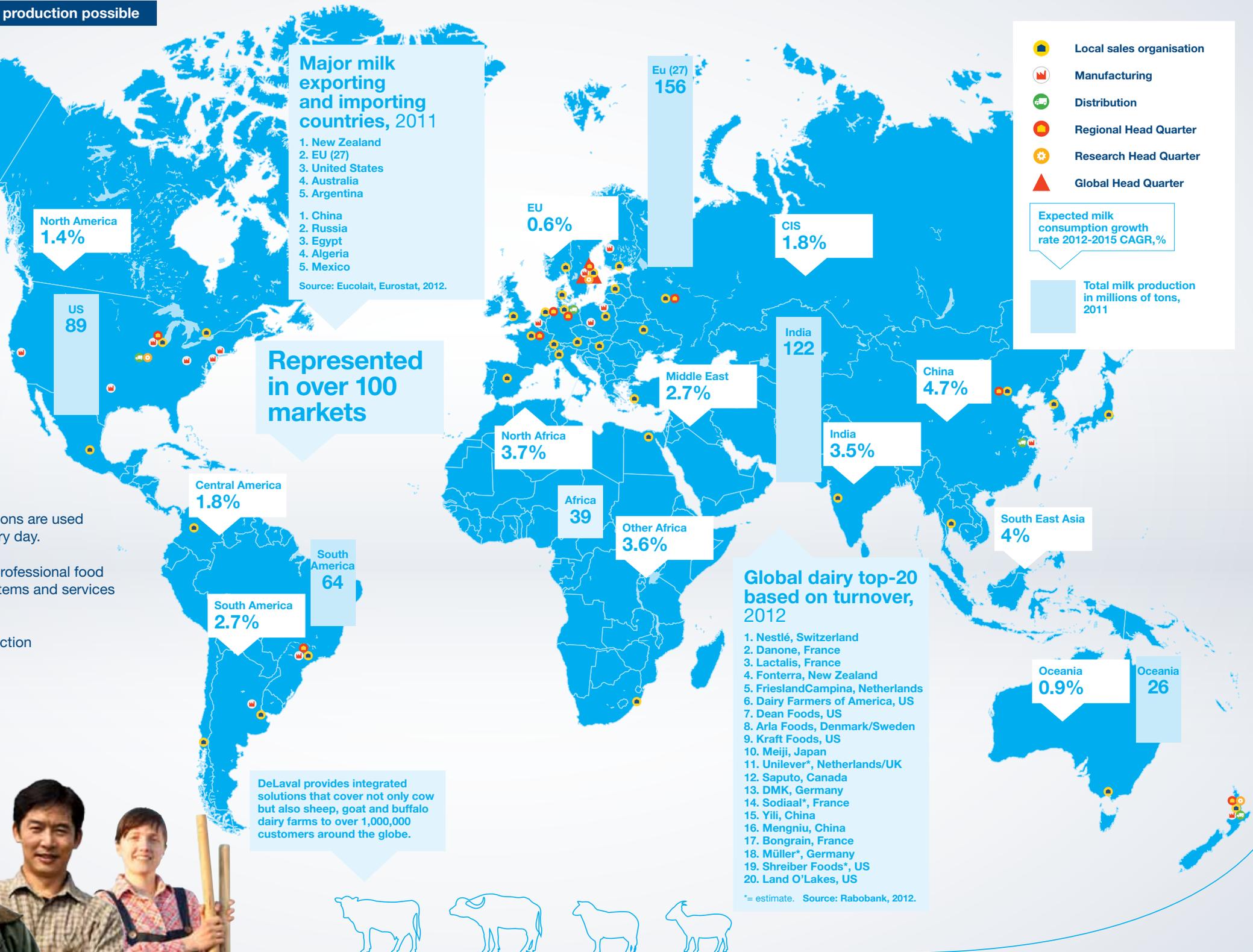
## Major milk exporting and importing countries, 2011

1. New Zealand
2. EU (27)
3. United States
4. Australia
5. Argentina

1. China
2. Russia
3. Egypt
4. Algeria
5. Mexico

Source: Eucolait, Eurostat, 2012.

Represented in over 100 markets



- Local sales organisation
- Manufacturing
- Distribution
- Regional Head Quarter
- Research Head Quarter
- Global Head Quarter

Expected milk consumption growth rate 2012-2015 CAGR, %

Total milk production in millions of tons, 2011

## Global dairy top-20 based on turnover, 2012

1. Nestlé, Switzerland
2. Danone, France
3. Lactalis, France
4. Fonterra, New Zealand
5. FrieslandCampina, Netherlands
6. Dairy Farmers of America, US
7. Dean Foods, US
8. Arla Foods, Denmark/Sweden
9. Kraft Foods, US
10. Meiji, Japan
11. Unilever\*, Netherlands/UK
12. Saputo, Canada
13. DMK, Germany
14. Sodial\*, France
15. Yili, China
16. Mengniu, China
17. Bongrain, France
18. Müller\*, Germany
19. Shreiber Foods\*, US
20. Land O'Lakes, US

\* = estimate. Source: Rabobank, 2012.

DeLaval provides integrated solutions that cover not only cow but also sheep, goat and buffalo dairy farms to over 1,000,000 customers around the globe.



## DeLaval at a glance

Number of employees

4,400

Local sales offices

35

Manufacturing units

18

Market presence

>100

Mobile shops & delivery trucks

736

Research and Innovation centers

3

### Our vision

We make sustainable food production possible

### Our solutions

DeLaval offers five Capital Goods systems: Conventional Milking Systems, Automatic Milking Systems, Cooling Systems, Feeding and Housing Systems and Farm Management Support Systems. DeLaval customers can also choose from a wide range of services and consumables which are grouped in four portfolios: Liners & Tubes, Farm Supplies, Services & Original Parts, Milk Quality & Animal Health.

### Focus on service

In a competitive market, good customer service differentiates one company from another. To further strengthen the partnerships we have with our customers, we have created InService™. It is a trademark for service taking into consideration that every farm is different and every farmer unique, whilst adapting the solutions to their particular requirements.



### DeLaval Corporate Social Responsibility cornerstones are:

#### Food for Development

Food for Development is an important part of DeLaval's corporate social responsibility. The target is to achieve sustainable social and economic dairy development by promoting public-private partnership in developing countries. We are committed to helping customers, governments and community based organisations to provide milk to children around the world. A public-private partnership is the best way to fight rural poverty and malnutrition through dairy development.

#### Sustainable Dairy Farming

Sustainable Dairy Farming is a DeLaval initiative to support farmers do more with less. The goal is to reduce the environmental footprint of farms, while improving milk production, farm profitability and the well-being of the people and animals involved. DeLaval believes this goal can be achieved by providing smart technology and services to increase resource efficiency.

#### R&I

Research and innovation has been essential to DeLaval's steady progress. This is especially emphasised in product development, where the team works in close contact with a worldwide network of farmers, academics, dedicated research facilities, scientists, sales teams, authorised dealers and other agricultural experts.

#### Smart Farming

Smart Farming is a DeLaval initiative aimed at influencing and shaping the future of dairy farming today. The goal is to accelerate the transition from milking management to global farm profitability management by harnessing emerging decision tools and automation technologies for better quality milk and profits.

Download the full CSR report on:

[www.delaval.com/en/About-DeLaval/Sustainability/](http://www.delaval.com/en/About-DeLaval/Sustainability/)

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