



ALLAND  *ROBERT*
— *Since 1884* —

DISTRIBUTOR MEETING DECEMBER 2025

Agenda

1. COMMERCIAL TEAM A&R
2. BUSINESS REVIEW AND RAW MATERIALS
3. A&R DISTRIBUTION
4. COMPETITIVE ENVIRONMENT
5. TARGETS 2026
6. STRATEGY
7. ACTIONS 2026

1. TEAM A&R

1. Commercial Team A&R

- Service Com

- *Customer Management (GKA, Direct Customer, Distributor)*

- Helen Ravets
 - Nawal El Kahlaoui

- Service ADV

- *Order Management*

- Pascaline Dodier
 - Stéphanie Douchez
 - Patricia Gabens
 - Myriam Bekkar
 - Magalie Lhermelin

2. BUSINESS REVIEW AND RAW MATERIALS

2. Business review and raw materials

- A&R business 2025 15% below budget
 - Missing raw materials (Senegal)
 - Poor quality of raw materials
 - High stocks at several customers from 2024
 - Sudan crises and high prices of raw materials
- Sales starting for Beyond Acacia, many learnings about possible applications, but also non-uses
- First hit for Syndeo Gelling
- New competitors in the market



SYNDEO® GELLING,
A PLANT-BASED
GELLING AGENT

3. A&R DISTRIBUTION

3. A&R distribution

Global Key Accounts

Coca Cola

Pepsi

Mars Wrigley's

Nestlé

Mondelez

Perfetti

Danone

Ferrero

Givaudan

Symrise

Mane

IFF

DSM Firmenich

ADM

Sensient

Döhler

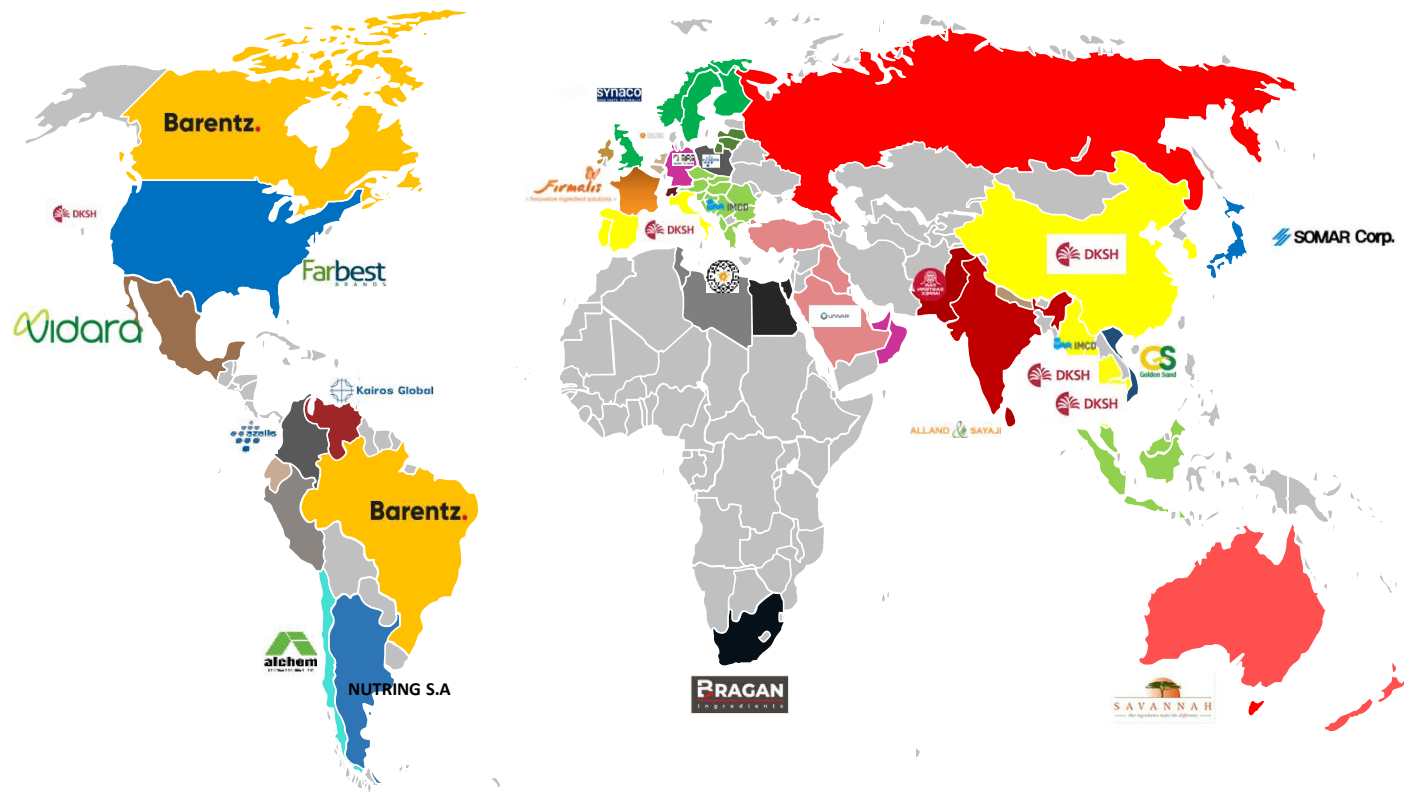
3. A&R distribution

Many changes in recent years

- Barentz buys Cambrian Canada and Metachem Brazil
- Azelis buys Rocsa Colombia and Peru and Hortimex Poland
- Univar buys Kalekimya Turkey
- Vidara buys Helm Mexico
- Solevo buys Bragan Ingrediens South Africa
- A&R changes distributors to new partners
 - Germany: Bioscience Food Solutions
 - Spain, Portugal and Italy: DKSH
 - Singapore, Malaysia and Indonesia: DKSH

Barentz.





4.

COMPETITIVE ENVIRONMENT

4. Competitive Environment

- Traditional competitors
 - Nexira France
 - Willy Benecke / Spraygum Germany
 - Ingredion (TIC Gum) US
 - ISC US
 - Kerry Ingredients UK

4. Competitive Environment

- New competitors
 - Ingredion Thailand and Brazil
 - Morouj UK
 - Drytech India
 - Dingli China
 - Lucas Ingredients Turkey
 - Caragum Marokko

4. Competitive Environment

- Trading competitors
 - Norevo Germany
 - Agrigum UK

5. TARGETS 2026

5. A&R Targets 2026

- Stabilize sourcing and quality
- Transfer clients to T4 / granulated gum
- Add customers to Syndeo Gelling
- Promote FFL
- Add value to gum acacia supply chain

5. Strategy

- Promote Beyond Acacia whenever possible, offering financial advantages and technical support for the transfer
- Aggressive pricing to defend our position in the market
- Challenge our competitors' quality and reliability
- Add new proposals to our range
- Increase service, flexibility, speed, reliability, innovation

5. Strategy

- Explore new segments and products
 - Karaya gum
 - Liquid gum
 - Savoury solutions
 - Glazing agents
 - Animal feed
 - Agricultural products / crop protection

6. ACTIONS 2026

6. Actions 2026

- Regain confidence through stable supply
- Regain market share with competitive prices
- Analyse markets and find new customers and applications
- Position Beyond Acacia as the best gum in the market, a win-win-win solution (for the client, for A&R and for the environment)
- Promote Syndeo Gelling as the ultimate vegan texture solution
- Add value to the supply chain with additional services
 - Technical support from our experts
 - provide new offers like FFP, liquid gum, A&R services

YOUR TURN !

...and we will support you:

