



BCNET
CONNECT
HIGHER ED & RESEARCH TECH SUMMIT

Empowering Growth

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TELUS Agriculture

Agenda

- Industry challenges
- Why agriculture, food and consumer goods
- What we're doing
- Partnering for success



Challenges we're facing

30% of all food produced is wasted.

34% of Canadians would pay a premium for brands known for sustainability practices.

25% of freshwater used in agriculture goes to produce lost or wasted food.

Almost **1 in 10** people in the world fall ill after eating contaminated food and 420,000 die every year.

Consumers will spend up to **\$150 billion** on sustainable products by 2021.

48% of Canadians are concerned over plastic and packaging waste.

We will need a **70% increase** in food available for consumption by 2050.



Supply chain disruptors



Global pandemic

Increased demand for goods and reshaped supply chains.



Weather

Unpredictable events blocking production or distribution.



Consumer preferences

Trends include omnichannel experiences and greater demand for sustainable products.



Why agriculture, food and consumer goods?



Opportunity to enable data connectivity through knowledge and infrastructure



The social capitalism company supporting sufficient, safe, sustainable food and goods to supply the growing population



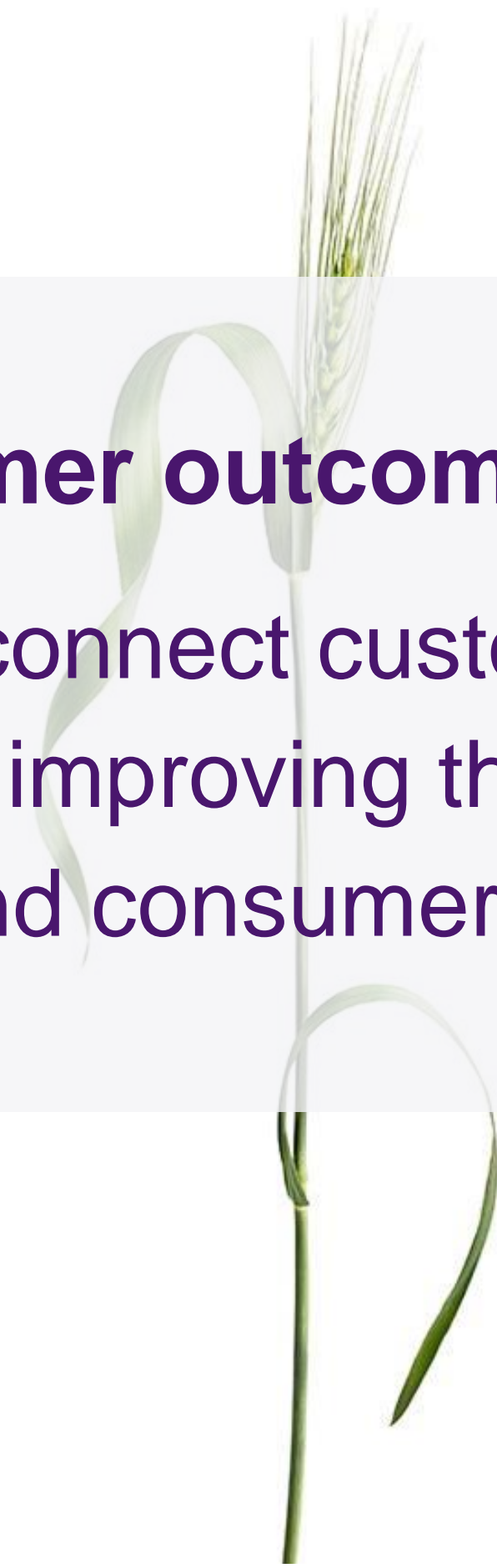
Leveraging TELUS Health experience to deliver better data enabling better nutrition outcomes



About TELUS Agriculture

Creating the best producer-to-consumer outcomes

We deliver digital insights that empower and connect customers, from producers to consumers, around the world, improving the quality, safety, distribution and sustainability of food and consumer goods.



Our strategy



Connect

Connect a rural world underserved with communications capabilities.



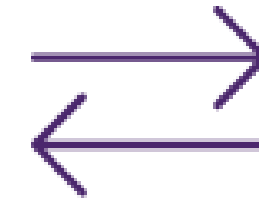
Digitize

Empower all parties by digitizing key information.



Optimize

Optimize customer execution through data insights and artificial intelligence.



Exchange

Exchange digitized information to help all parties operate more efficiently.

Our journey to date



Crop planning and farm management application for growers.

Acquired
July 2019



Data capture, analytics and demand generation for input manufacturers and retailers.

Acquired
August 2019



High-end variable rate technology and professional services company for large growers.

Acquired
December 2019



Precision agriculture solutions and API integrations.

Acquired
June 2020



Capturing and sharing information across the field-to-fork value chain.

Acquired
July 2020



SaaS-based trade promotion management, optimization and analytics (TPx) solutions.

Acquired
September 2021

AI and mobile-first software solutions for CPG, food distributors, and manufacturers.

Acquired
September 2020



Farm-to-fork traceability and supply chain management company.

Acquired
March 2020



Feedlot animal health and production consulting.

Acquired
November 2020



Farm management information systems (FMIS) software and solutions for growers and producers.

Acquired
July 2021

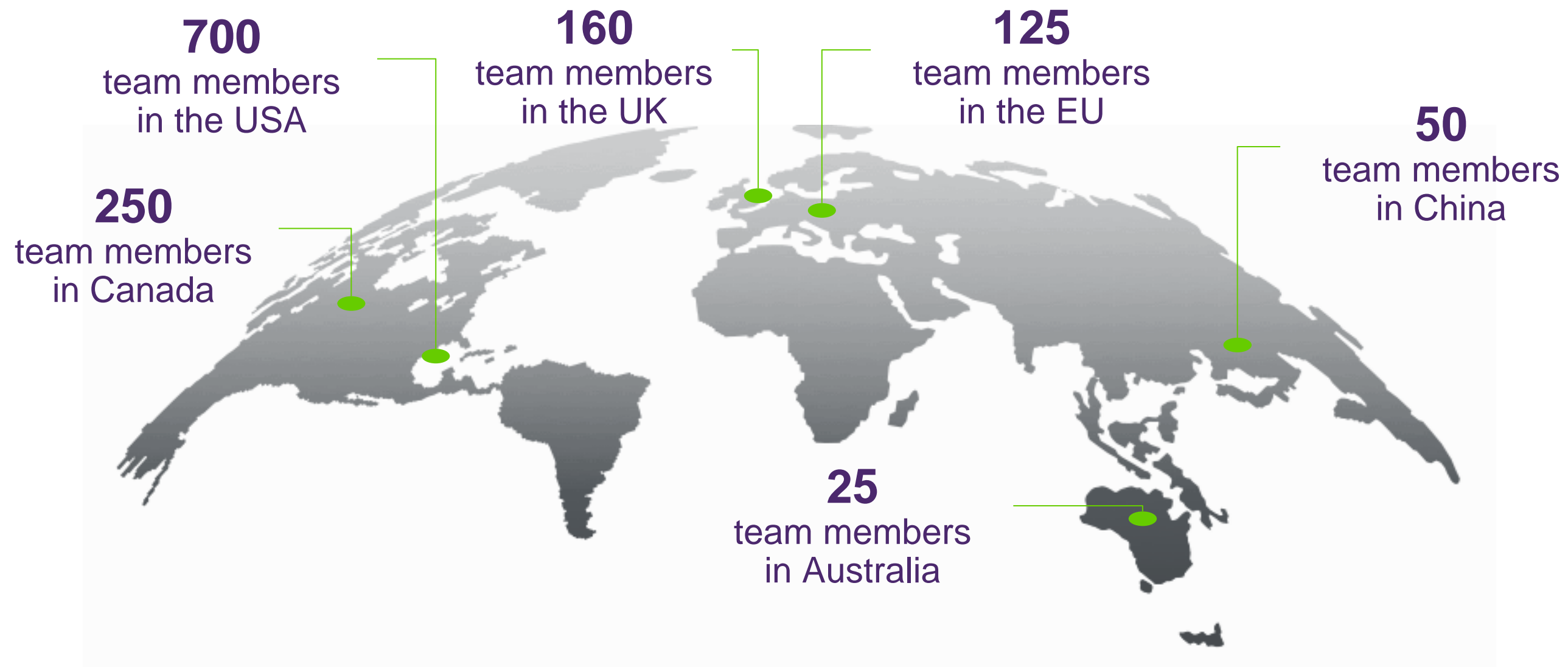


Integrated online cattle record management software capturing data throughout an animal's life.

Acquired
September 2021



Our global footprint



1,600+

Team members on
4 continents

6,600+

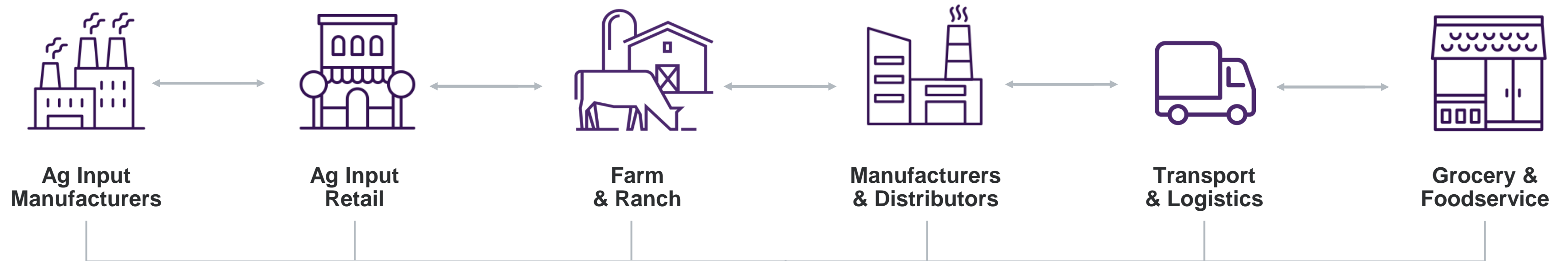
Customers

6 of 10 top Food & Bev suppliers,
and 9 of 10 top Ag companies

50+

Countries with TAG
customers

Building a connected value chain



SHAREABLE DATA & INSIGHTS

- | | | | | | |
|---|---|---|---|---|--|
| <ul style="list-style-type: none"> • Crop input production • Equipment production | <ul style="list-style-type: none"> • Agronomic data • Crop input sales • Animal health input sales | <ul style="list-style-type: none"> • Farming methods • Crop & animal records • Field mapping & imagery • Input & equipment performance • Weather | <ul style="list-style-type: none"> • Production methods • Traceability & quality • Ingredients & nutrition • Trade promotion planning | <ul style="list-style-type: none"> • Inventory optimization • Transport capacity • Logistics performance | <ul style="list-style-type: none"> • POS & consumer behaviour • Store replenishment • Shelf optimization • Service performance |
|---|---|---|---|---|--|

Connecting the value chain to unlock the next phase of operational efficiency and strategic growth for participants

What we do



Agribusiness

Connected solutions for optimized profitability, farm management, increased efficiency and insights.

DATA MANAGEMENT

**MARKETING PROGRAM
MANAGEMENT**

MARKET INTELLIGENCE & INSIGHTS

FARM MANAGEMENT SOFTWARE

PRODUCTION OPTIMIZATION

INTEGRATED IoT



Food, beverage & consumer goods

Connected solutions for consumer goods manufacturers and distributors from planning through to execution.

TRADE PROMOTION EXCELLENCE

RETAIL EXECUTION

SUPPLY CHAIN MANAGEMENT



Animal health

Livestock farm management software and data-driven recommendations for how to assess risk and monitor the animals well being.

PRODUCTION CONSULTING SERVICES

HERD CONSULTING

MARKETING PROGRAM MANAGEMENT

DATA MANAGEMENT /SERVICES

DEMAND CREATION

PHARMACEUTICAL SERVICES

VIRTUAL VET CARE

Who we work with

Agribusiness



Food, beverage and consumer goods



Animal health



Case study: Unilever Sustainability



CHALLENGE

Need for all agricultural raw materials to be sustainably sourced by 2020

SOLUTIONS USED

- Farm management
- Supply change management

What we did:

Remotely analyzed suppliers' performance against Unilever's on-farm Sustainable Agriculture Code that included 380 data points, such as:

- Pesticide and water use
- Social, economic, animal welfare
- Carbon footprint performance

Outcome:

Provides Unilever real-time insight to proactively manage and respond in real time to risk issues in their supply chain by supplier, country or crop.

240+
Suppliers

80K+
farmers

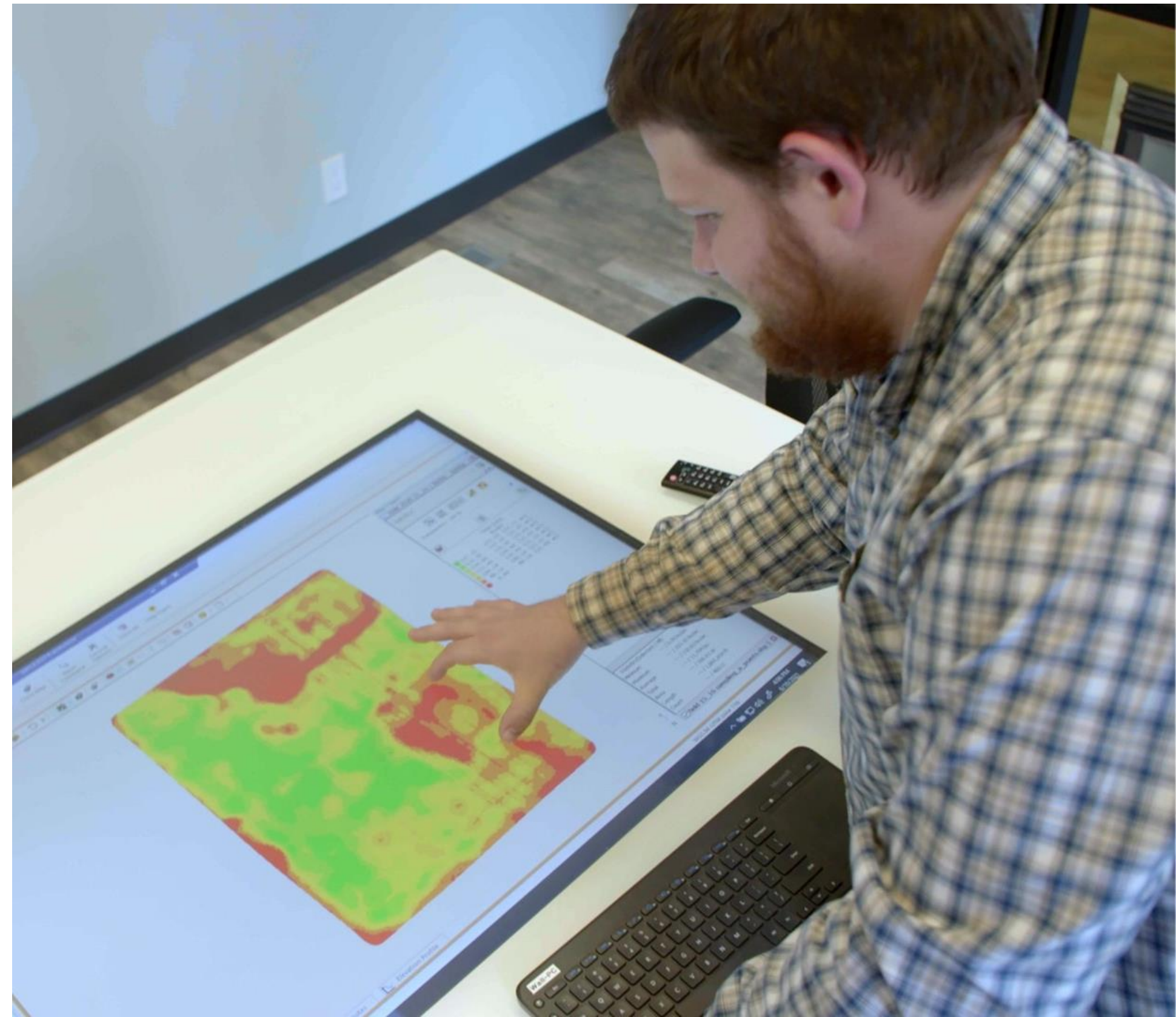
67
countries



Partnering for success

Olds College Smart Farm

- 2,800-acre living lab
- Test tech and data solutions in real-world conditions
- Develop next generation of farm talent



Olds College Smart Farm projects



Connectivity

- 5G
- Repeaters/extenders

Farm sustainability

- Variable rate technology
- Farm management platforms

IoT solutions

- Farm security
- Animal health tags
- Bin monitoring
- Weather solutions

Summary

- Addressing global social and supply chain challenges
- Building a connected, digitized value chain
- Applying social purpose in agriculture, food and consumer goods





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