



Elanco Food Solutions

Who We Are

- Veterinary division of Eli Lilly & Company
- *“Not the tray packaging company”*

Eli Lilly – Fast Facts

- A heritage more than 130 years strong: company founded on May 10, 1876
- Headquarters located in Indianapolis, Indiana, U.S.A.
- About 40,000 employees worldwide
- About 7,900 employees engaged in research and development
- Clinical research conducted in more than 50 countries
- Research and development facilities located in eight countries
- Manufacturing plants located in 13 countries
- Products marketed in 143 countries

Elanco Division of Eli Lilly & Company

Who We Are

- Veterinary division of Eli Lilly & Company
 - Brought more than 35 agricultural and animal health products to the global marketplace for pork, poultry, beef and dairy including
 - Food safety solutions
 - Livestock production medicine such as antibacterials, parasiticides, anticoccidials, productivity enhancers and feed additives
 - Elanco products touch >60% of Canadian pork, poultry, beef and dairy

By the numbers:

History:
Lilly Founded 1876 – Elanco 1953

Employees :
Lilly 39,000 – Elanco 2,300

Sales:
Lilly 2.1 B – Elanco >1.2B

Sales Market Countries:
Lilly 143, Elanco 75

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What we do

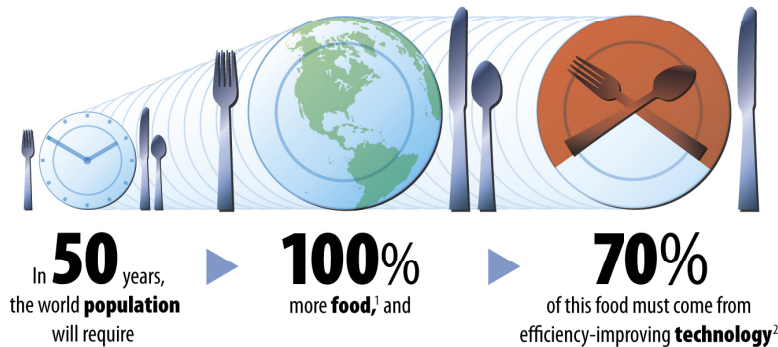
- We provide goods/knowledge/services to:
 - Food retailers
 - Meat and milk processors
 - Government regulatory bodies
 - Veterinarians
 - Feed input suppliers and distributors
 - Livestock producers and their suppliers

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Food Economics and Consumer Choice

An overview of the challenge ahead

Key Data



¹ Green, R. et al. January 2005. "Farming and the Fate of Wild Nature." Science 307.5709: 550-555; and Tilman, D. et al. August 2002. "Agricultural sustainability and intensive production practices." Nature 418.6898: 671-677.

² "World Agriculture: toward 2015/2030." 2002. United Nations Food and Agriculture Organization, Rome. Accessed 12/8/08. <ftp://ftp.fao.org/docrep/fao/004/y3557e/y3557e.pdf>.

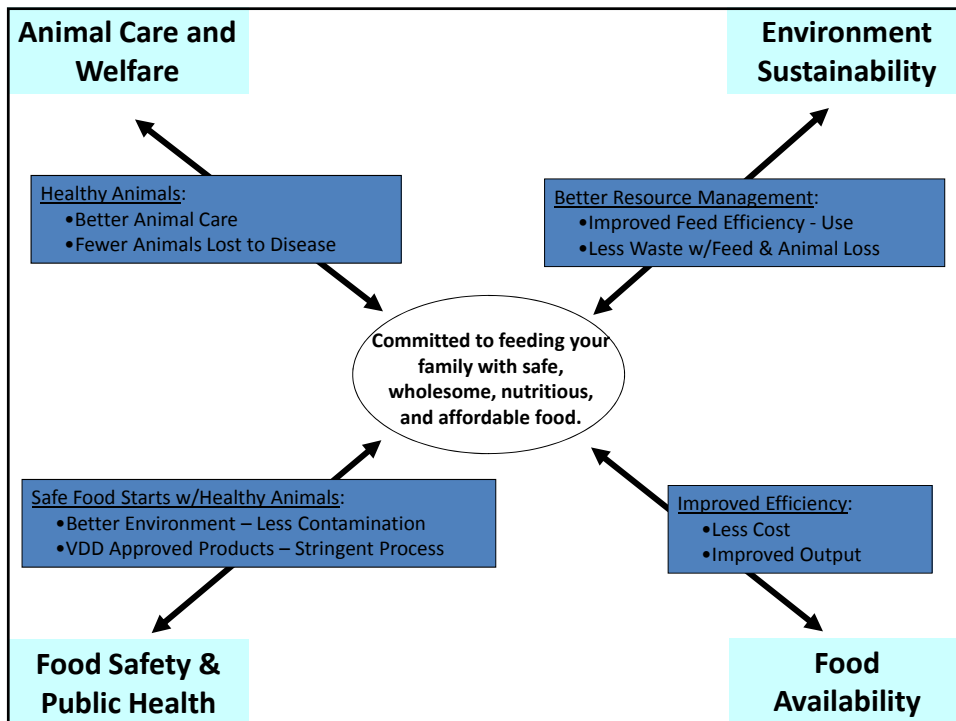
TECHNOLOGY'S ROLE IN THE 21ST CENTURY

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Elanco – Social Responsibility

- Five areas of philanthropic and social responsibility:
 - World hunger – Heifer International
 - Agriculture Leadership
 - Human – Animal Bond
 - Environment
 - Community Service

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Animal Care and Welfare

Healthy Animals:

- Better Animal Care
- Fewer Animals Lost to Disease
- With veterinarian oversight and individual monitoring, use of animal-care applications are essential to ensure the health and comfort of all food animals

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Environment Sustainability

Improved Resource Management

- Three times more efficient than grass fed beef
- Reduces greenhouse emission by 40 percent compared to grass-only programs
- More efficient food animal production than in the past
- Ensures affordable food supply for all

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Food Safety and Public Health

Safe Food Starts with Healthy Animals

- Healthy animals reduce risk of food borne illness*
- Maintain animal health; prevent and/or treat disease
 - Key component of comprehensive health program
- Help minimize losses during processing
 - Respiratory and digestive

*Elanco Consumer Research 08

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Food Availability

Improved Efficiency

- Less Cost
- Improved Output

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How we deliver

- **Provide trusted solutions to problems within the food supply chain (our source of income)**
 - Systems that reduce the e-coli log by 2 on beef carcasses entering the food chain
 - Reducing risk of food borne illness, and increasing shelf life
 - Medicines that fight and prevent disease in the live phase
 - safe, affordable and consistent supply of pork, beef, dairy and poultry
 - Technologies that increase the sustainability of the global food basket
 - One Elanco solution reduces the carbon footprint of beef production by X% versus organic type practices

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How we deliver

- **Research and development of novel, patented solutions (same process as new medicines to the human medicine business)**
 - Elanco spends over 100 million dollars annually on
 - Sustainability solutions
 - Increased sustainability through efficiency
 - Welfare
 - New and improved medicines and their safe administration
 - Food safety
 - Minimize risks of contamination, healthy animals, tracability in our production

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How we deliver

- **Customized knowledge solutions**
 - Welfare concerns are addressed through Elanco's significant investment in capabilities, research and field outreach on low stress handling of pigs
 - Food residue detection and monitoring through our Assurance Plus monitoring program

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Why are we here?

- Your customers, are our customers
- Your supply chain, who are influenced by you, pay us
- We can help you, and them, address the opportunities and challenges of our food basket

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How?

- Match your initiatives around sustainability, welfare and brand with our solutions
- Become a knowledge resource to you, on topics in our wheelhouse
- Create new solutions, based on your identified needs

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Our ASK

Can we explore these needs further we your organization?



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