BIOMARINE BUSINESS CONVENTION

GRAN CANARIA
SPAIN

Marine Bio-Resources...
For a New Blue Economy
3. GROWTH POTENTIAL

THE MARKET FOR BIOMARINE ECONOMY IS WORTH $176 BILLION

BUT...

| Marine biotechnologies represent only 8% of the total biotech market | 15% |
| Marine bioplastic is less than 1% of the total biomaterial market | 10% |
| Marine bio energies represent 1.5% of the energy market | 3% |
| Marine renewable energies are less than 8% of the energy market | 17% |
| Aquaculture represents 12% of the global protein market | 35% |
| Blue chemistry represents only 6% of the chemicals market | 15% |
| Marine cosmetics account only for 13% of the cosmetics market | 30% |
| Marine nutraceuticals represent 32% of the nutraceuticals market | 50% |
| Marine ingredients represent 38% of natural compounds market | 55% |
3. INDUSTRIES & APPLICATIONS

**FOOD & NUTRITION**
- Food safety and quality
- Innovation and product development
- Sensory science
- Aquaculture
- Production
- Marine bioprospecting
- Seafood and health
- Nutrition
- Product stability
- Traceability
- Environment and ethics
- Market-based harvesting etc.

**COSMETICS**
- Marine raw materials and ingredients
- Additives
- Anti-ageing, anti-wrinkle
- Anti-inflammatory, anti-irritants, soothing
- Antibacterial
- Antioxidants, radical scavengers
- Biological, biofermentation
- Biofilms
- Corrosion inhibitors
- Dispersants, suspending agents
- Emollients, oils, fats
- Emulsifiers
- Enzymes, enzyme inhibitors
- Natural actives etc.

**PROCESSES:**
- Culture, waste-capturing, water recycling extraction...

**BIOMASS:**
- Algae, bacteria, fishing byproducts...

**SEA WATER**

**MARINE RENEWABLE ENERGY**
- Algae and biofuels
- Hydrogen (as a byproduct of other marine renewable energies)
- Osmotic and reverse-osmotic seafood byproducts etc.

**ENVIRONMENT & CLEANTECH**
- Sustainable technology for shipbuilding
- Processes
- Bioremediation
- Waste management
- Impact management
- Water treatment
- Marine natural fertilizers
- Blue chemicals
- Environmental consulting etc.

**HEALTH & PHARMACOLOGY**
- Biotechnology
- Pharmaceuticals
- Pharmaceutical products
- Gene therapy
- Metagenomics
- Cancer therapy
- Fertility
- Dermatology etc.
2. AUDIENCE

DEVELOPING PARTNERS
ESTABLISHED PARTNERS
STRONG PARTNERS

ALASKA
BRITISH COLUMBIA
OREGON
CALIFORNIA
SAN DIEGO

NOVA SCOTIA
NEW BRUNSWICK
QUEBEC
MAIN

BOSTON
MARYLAND
NORTH CAROLINA
FLORIDA

SWEDEN
GERMANY
POLAND
IRELAND
UK
FRENCH BRITTANY

SPAIN
PORTUGAL
MONACO
ITALY
MALTA

CHINA
MALAYSIA
VIETNAM
SINGAPORE
INDONESIA

ICELAND
NORWAY

RUSSIA
JAPAN
HAWAII

CHILE
ARGENTINA

BRAZIL

SOUTH AFRICA
MOZAMBIQUE

ISRAEL
U.A.E

INDIA
AUSTRALIA
NZ
SYNERGIES MAP

Connect
Collaborate
Finance

CLUSTERS

Communicate
Inform
Advertise
with BioMarineTV

GLOBAL COMMUNICATION

Showcase
Meet
Deal
at BioMarine Business Convention

Represent
Link
Create value

BTICA

Best practises
Governance regulatory with B.I.C.A

BioMarine

Investors

$ INVESTORS

Scout
Identify
Invest
with BioMarine
Blue Fund's partner
2. ABOUT BIOMARINE

What is BioMarine?

• A unique annual business convention of 300 CEOs, top executives and government officials
• A fast growing community with over 255,000 professionals
• A business connector platform dedicated to the Biomarine industry and related sectors
• A strategic partner of key industry leaders and investors
• An international organization of clusters: BioMarine International Clusters Association (B.I.C.A)

What is BioMarine recognized for?

• Broker for Innovation in marine bio resources - innovation forum
• Broker for Investment - unique scouting platform
• Broker for International collaboration: industry - developing countries & applied research
• B2B for marine bio resources industries
ESTORIL CONGRESS CENTER
Avenida Amaral, Estoril, Portugal
20 km from Lisbon, on the coast, located in the heart of the famous Costa do Estoril

Dimension
• Biggest maritime area (EEZ) in the EU and one of the 12 largest continental shelves in the World
• Extensive coastline and 2 Atlantic archipelagos

R&D
• More than 50 scientific centres of marine knowledge and research
• Considerable experience in marine biotechnology for investigation purposes

R&D

Portugal’s competitive advantages

Biodiversity
• Seamounts with rich marine biodiversity, deep sea coral reefs and hydrothermal vents hosting biota for biotech industries

Political aspects
• Adoption of public policies focused on Blue Growth
• Government support and incentives
• Local authorities full support for Blue Growth
• New legislation facilitating the access to maritime spaces and the exploration of marine natural resources
• Significant public support to foreign and domestic investment in the Blue Economy, including marine bioressources industries
• EU Structural Funds 2014/2020

Abundance of raw materials
• World’s third largest consumer of seafood per capita
• Developed fish processing industry

Pr Manuel Pinto de Almeida
Secretary of State for the Sea, Portuguese Government

Portugal is a principal European country in bio marine capabilities and aims at becoming Europe’s foremost leader in the bio marine sector, particularly by creating and attracting investment opportunities and supporting the development of R&D. (...) Portugal’s resolve in developing its sea-economy is aligned with the agenda of BioMarine2014. This is a unique opportunity for investors to meet, extend their network and learn from the best practices of key national and international stakeholders. BioMarine2014 is the gateway for outstanding business opportunities in Portugal.

Veronica McGuire
Executive Director
Program, Regulatory and Trade Policy Directorate, Canada

An increasingly complex global economy demands ongoing dialogue between industry leaders and government decision-makers among others. Key to this dialogue is taking full advantage of opportunities to share perspectives and learnings at the international level.

Oyvind Filling Jensen
CEO, Hofstra, Norway

Hofstra - the Norwegian Institute of Food Fisheries and Aquaculture - is a leading European-applied research institute in the fields of aquaculture, fisheries and food science. We have chosen the BioMarine Business Convention as an important venue to meet with business partners, other research institutes and industries interested in value creation based on marine resources. We see the oceans and materials of marine origin will increase in importance and become a key resource for building a new, blue economy, where the fisheries are managed sustainably and raw materials are used for creating new products and industries. The scope of BioMarine Business Convention is a key to achieving this objective.

Pia Winberg
Founder and CEO Venus Shal Systems, Australia

BioMarine has harnessed the collective energy and network that is needed for the world to address some of the global challenges that face us; sustainable marine resources, global change, nutrition and security from the oceans. It does this by bringing to the table the people that can turn the challenges into opportunities; efficient marine food production industries, marine bio-tech industries and marine clean tech industries.
2. DEAL-MAKING HISTORY  More than 76 M€ in deals since 2008

2008
BioMarine Forum
Toulon, Marseille, France
- 4 DAYS
- 550 ATTENDEES (2000 Public Sessions)
- 58 COUNTRIES
- 26 M€ DEALS

2009
Mer & Outre Mer
Paris, France
- 1 DAY
- 275 ATTENDEES
- 8 COUNTRIES
- +7 M€ DEALS

2011
BioMarine Business Convention
Nantes, France
- 2.5 DAYS
- 1175 ATTENDEES (including public sessions)
- 15 COUNTRIES
- 20 M€ DEALS

2012
BioMarine Business Convention
London, UK
- 2 DAYS
- 152 CEOs & EXECUTIVES
- 18 COUNTRIES
- +17 M€ DEALS

2013
BioMarine Business Convention
Halifax, Canada
- 2.5 DAYS
- 230 CEOs & EXECUTIVES
- 22 COUNTRIES
- +6 M€ DEALS (4 months)
### 5. IMPORTANT DATES

#### 2014 CALENDER

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<tr>
<th>JANUARY</th>
<th>FEBRUARY</th>
<th>MARCH</th>
<th>APRIL</th>
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<tr>
<td><strong>Fórum Do Mar - Portugal:</strong> BioMarine and Oceano XXI co-organize a think-tank on the use of fish by products</td>
<td>North Atlantic Sea Food Forum - Norway: BioMarine and Marlife will co-organize the Innovation Forum</td>
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<tr>
<th>MAY</th>
<th>JUNE</th>
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<td>ISAP annual conference - Sydney, Australia: BioMarine and ISAP will organize an industry and investors think-tank on the use of seaweeds</td>
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<th>SEPTEMBER</th>
<th>OCTOBER</th>
<th>NOVEMBER</th>
<th>DECEMBER</th>
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<tr>
<td>BioMarine Business Convention 2014, Cascais, Portugal</td>
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MISSION

- Structure our New BioMarine Industry
- Bring the 20 most important Biomarine clusters together
- Establish priority action framework for best practises
- Foster investment and innovative partnerships between all members
BICA’S HONORARY BOARD

HSH Prince Albert II of Monaco

Arne Benjaminsen
Director General Research and Innovation, Ministry of Fisheries and Coastal Affairs, Norway

Prof. Manuel Pinto de Abreu
Secretary of State of the Sea, Portuguese Government
With over 255,532 professionals, our BioMarine community represents a unique business environment. Stay in touch and get the latest updates from our network through our new BioMarineTV portal…