

Commercialization of Innovations through Corporate Partnerships

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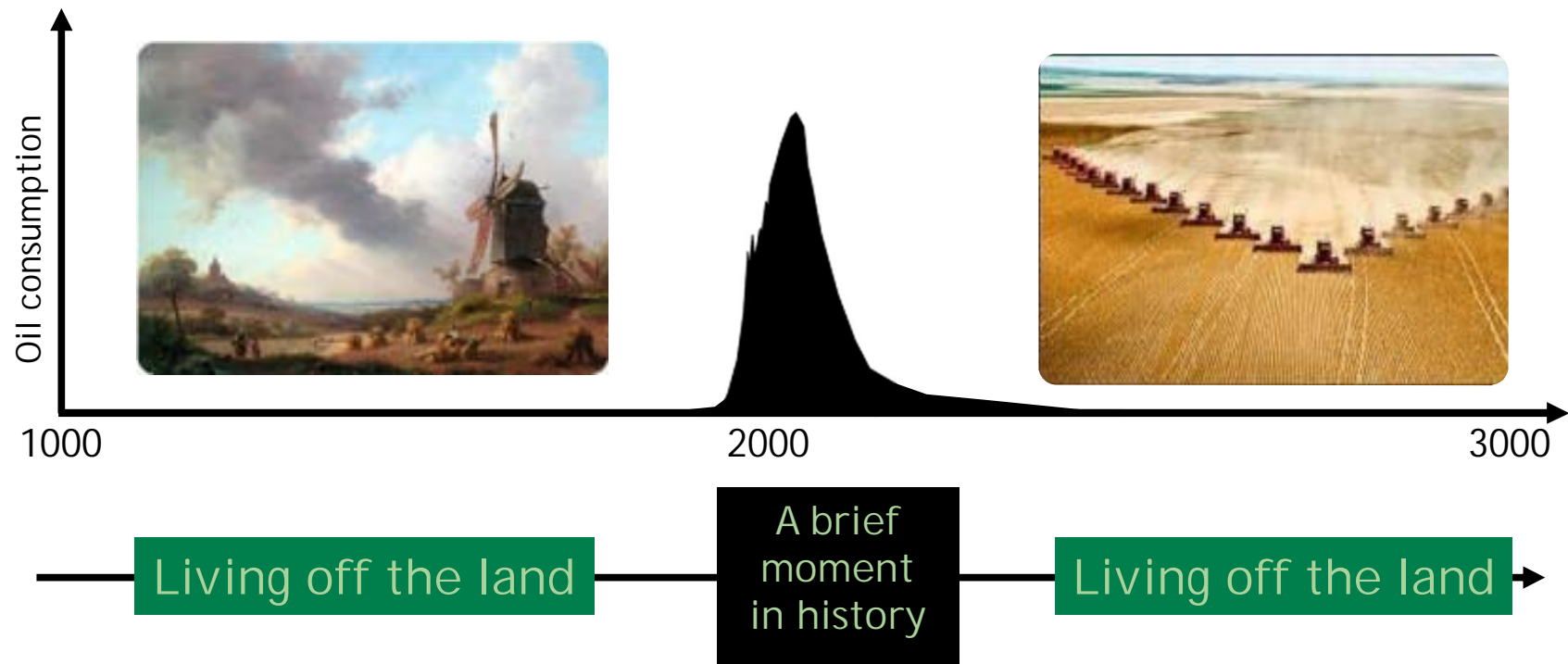
Safe harbor statement

This presentation may contain forward-looking statements with respect to DSM's future (financial) performance and position. Such statements are based on current expectations, estimates and projections of DSM and information currently available to the company. DSM cautions readers that such statements involve certain risks and uncertainties that are difficult to predict and therefore it should be understood that many factors can cause actual performance and position to differ materially from these statements. DSM has no obligation to update the statements contained in this presentation, unless required by law.

The English language version of this document is leading.

A more comprehensive discussion of the risk factors affecting DSM's business can be found in the company's latest Annual Report, which can be found on the company's corporate website, www.dsm.com

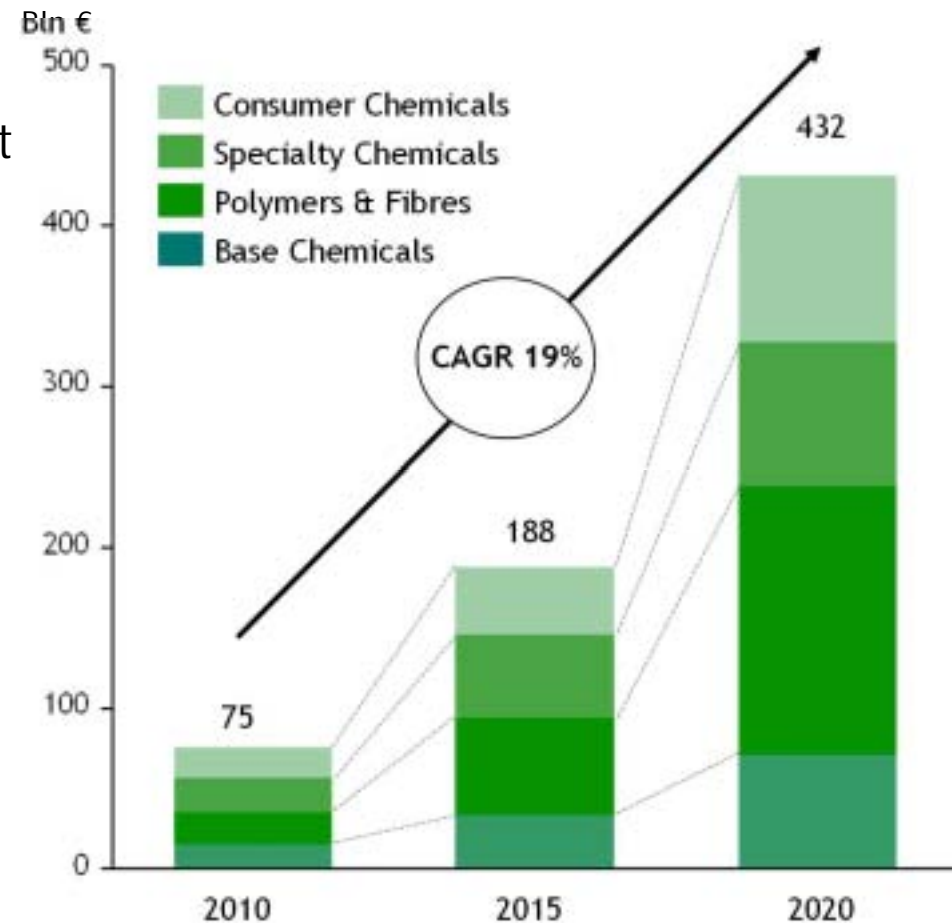
The End of an Era



The Oil age will end long before we run out of oil
And while running out, it will become much more expensive

Bio-based Chemicals Coming of Age

- The Growth Trend of Industrial Biotech is positive forecasted at 15-20% per Year Between 2010/2020
- Different studies have shown market forecast using different approaches (PMCs grouping, classification and assumptions).



Source: FESTEL CAPITAL Industrial Biotech Database 2011



Who is DSM?

(and where do we come from?)

Our purpose is to create brighter lives for people today and generations to come.

We connect our unique competences in Life Sciences and Materials Sciences to create solutions that nourish, protect and improve performance.

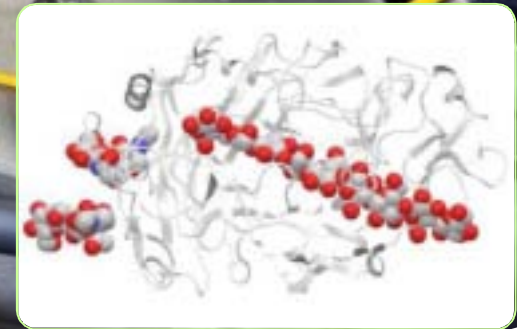
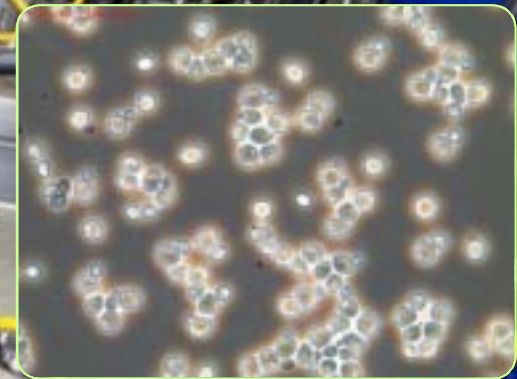
Successful transformation 1902 - 2010

Coal Mining → (Petro)chemicals → Life Sciences & Materials Sciences



We know Bio-Tech

Delft (Netherlands)

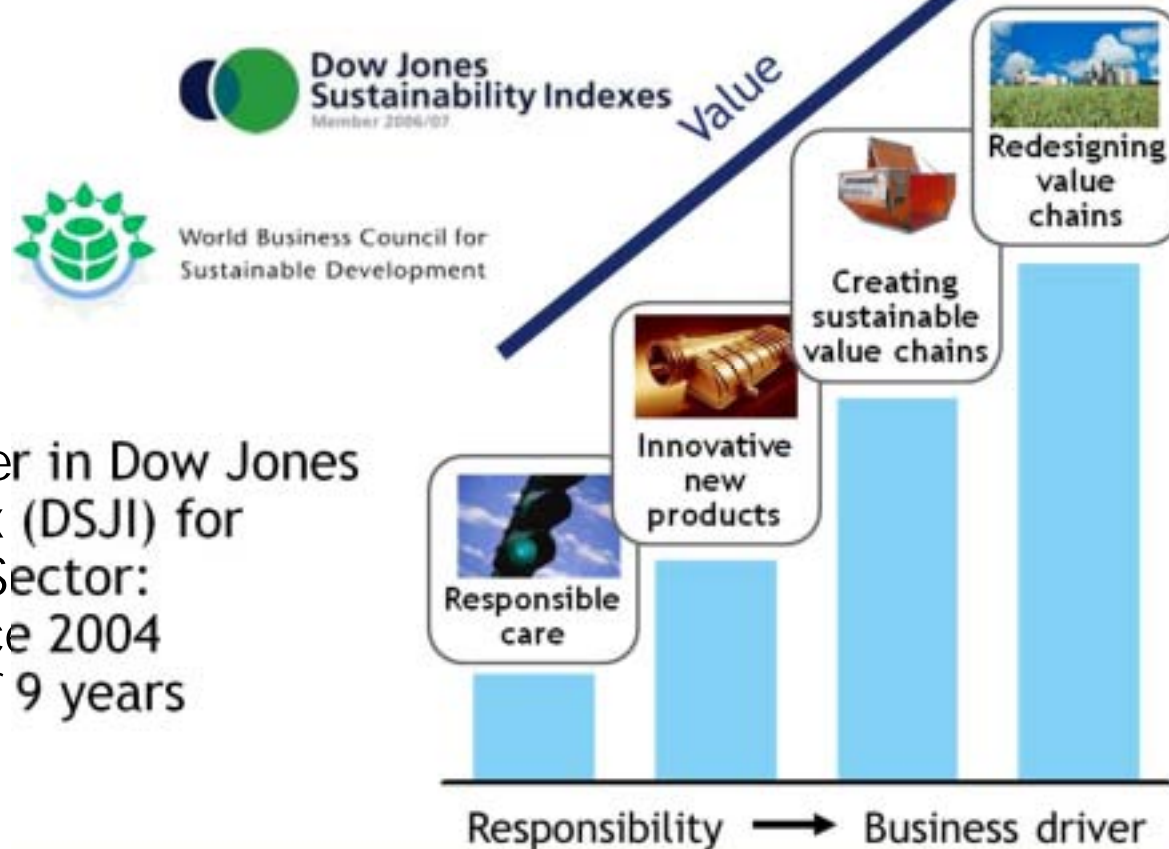




We know Manufacturing
Build & Operate Large Facilities (Geleen, Netherlands)

Sustainability

From Responsibility to business driver



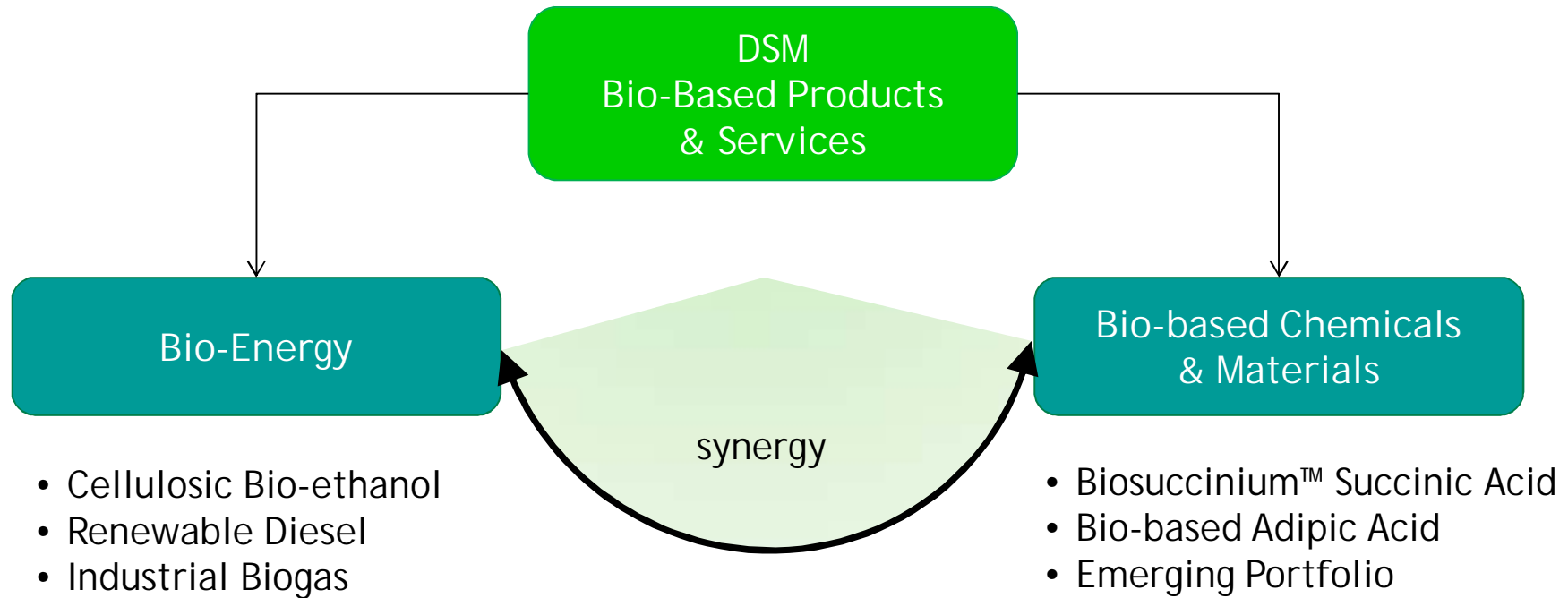
DSM is stable leader in Dow Jones Sustainability Index (DSJI) for Chemical Industry Sector:

- Top-ranking since 2004
- No. 1 in 6 out of 9 years

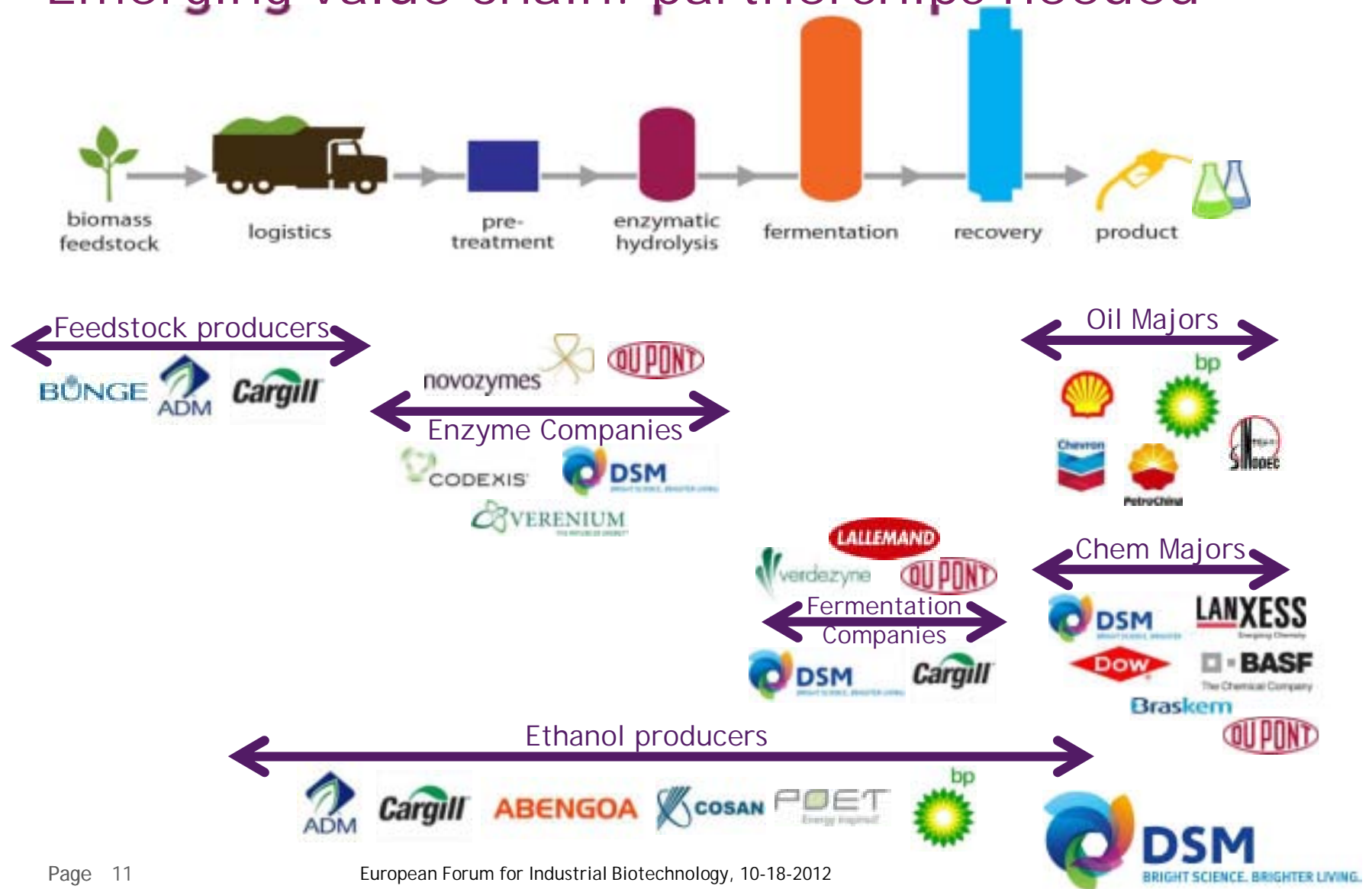
Rooted in DSM Core Values: "We can't be successful in a world that fails"

From Biotech to total Business Model

Enabling & Accelerating the Bio-Based Economy



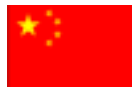
Emerging value chain: partnerships needed



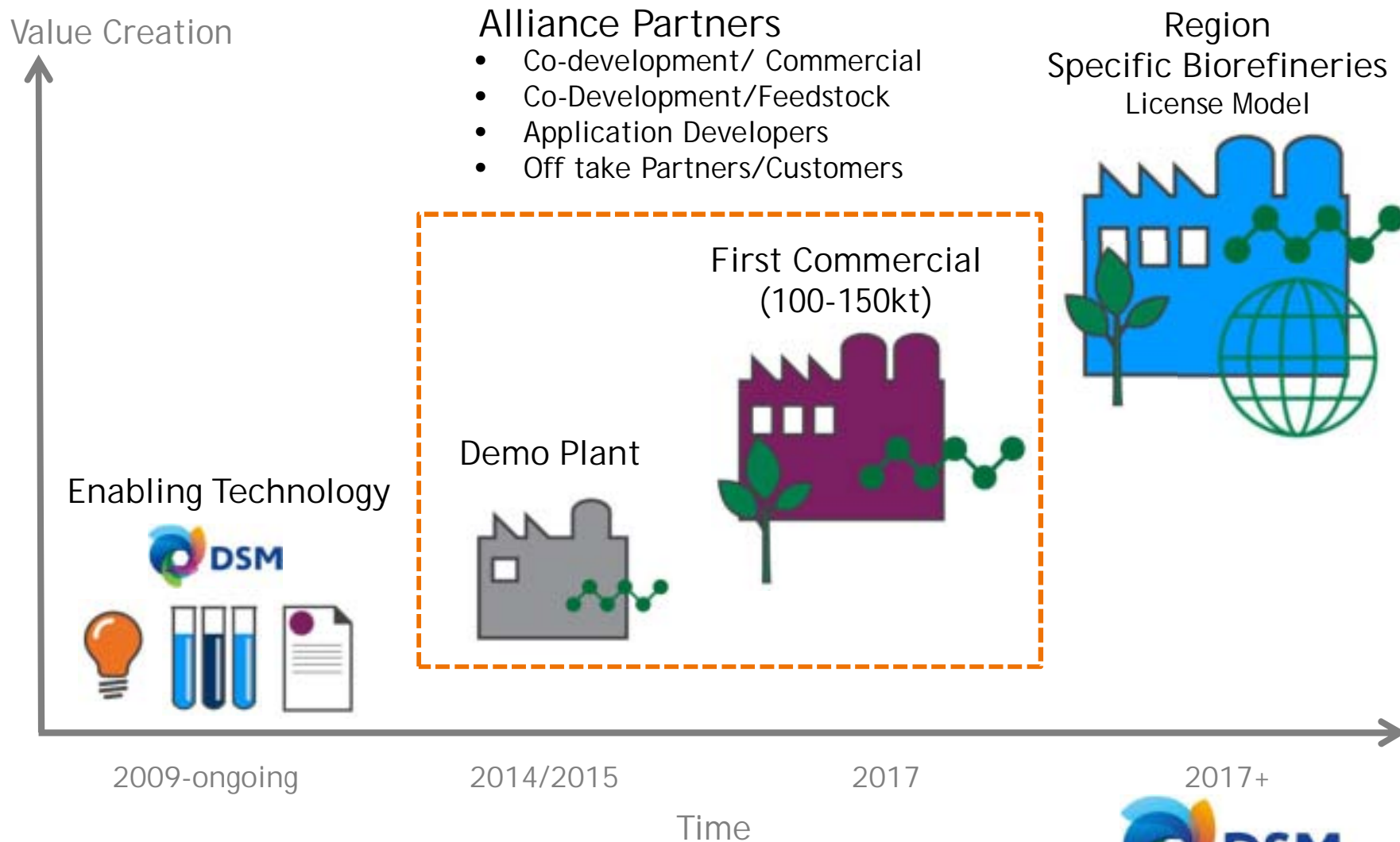
Examples of Recent DSM JV and Acquisition Deals

JV Deals

Acquisition



DSM Creates Enabling Technology (Software) to Facilitate Construction of Demo and Commercial Plants



Portfolio Direct Investments

Other forms of partnerships through Venturing

Life Sciences



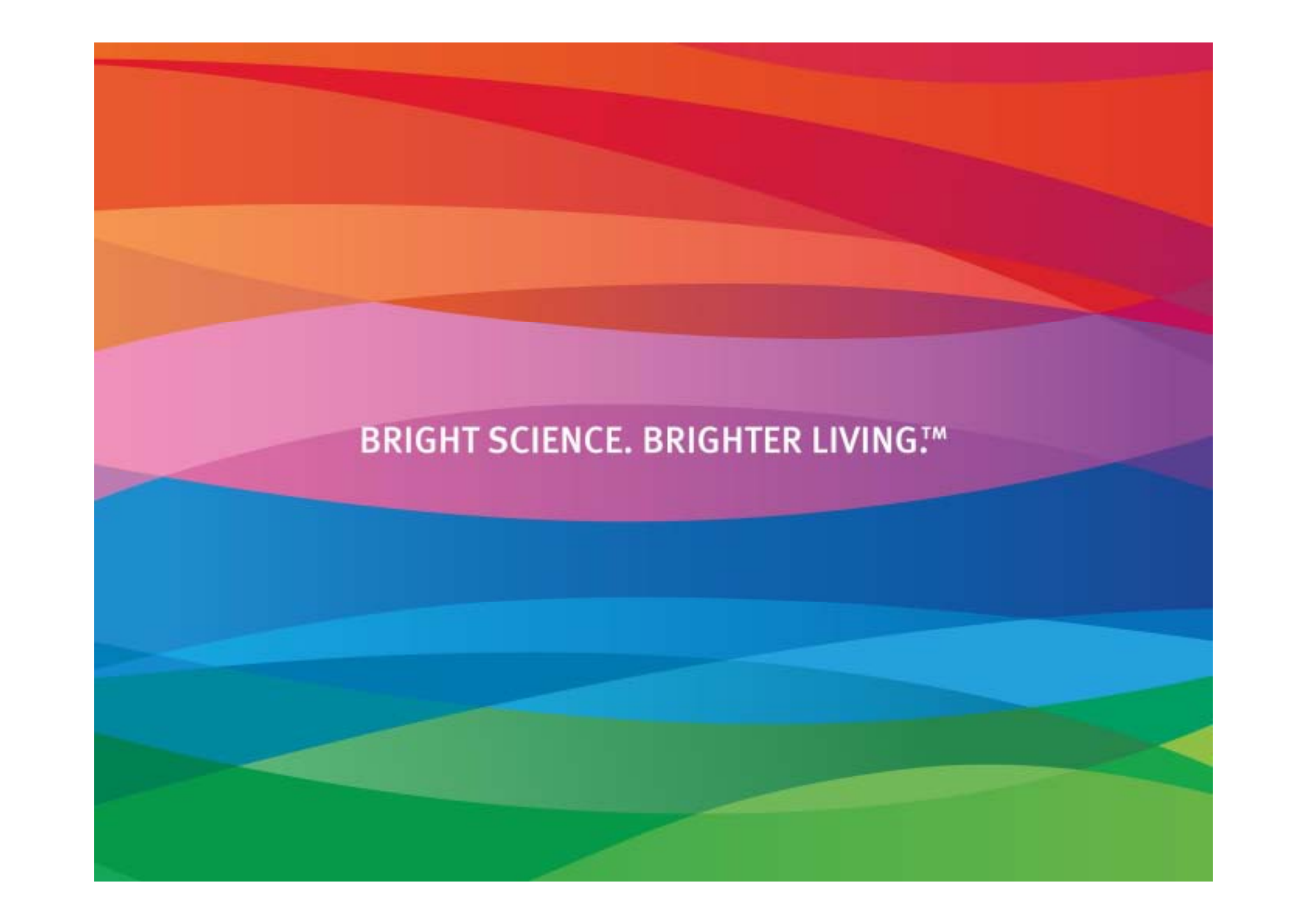
Material Sciences



Recap & Conclusions

- Sustainability addresses societal needs
- Innovation = sustainability = business
- Partnerships are needed:
 - Manage complexity
 - Feedstock-to-distribution
 - (Financial) risk sharing
- Don't hesitate to get in touch
 - Info.biofuels@dsm.com





BRIGHT SCIENCE. BRIGHTER LIVING.™

Give it 2 Me!

1. In 2050 there are 9 billion people on our globe
2. Demand for food will rise 70% in 2010-2050; Demand for calories will triple!
3. More than half of the world harvest currently goes to waste
4. We need innovations in agriculture and technologies to grow more - From the same amount of land
5. By 2025 1.8 billion people will be living in countries with absolute water scarcity
6. Global demand for water will increase by 30% by 2030
7. A third of water used with ordinary irrigation is lost
8. With efficient agricultural systems we can cover global food demand in 2050
9. Without technological improvements we may need up to 10 earths to fulfill energy demand based on biomass in 2050
10. Bio-based materials can substitute 20% of current plastics in 2050 without increasing the area of land used today
11. In 2020 Europe can cover more than 50% of gasoline consumption with biofuels, without changing today's agricultural patterns . This will lead to greater transport fuel self sufficiency

“DSM’s efforts on energy, oil-replacement materials and so on is exactly the kind of long-term, beyond-the-horizon thinking that we encourage and extol”

Robert Safian, Chief Editor, Fast Company



“DSM’s actions are excellent examples of how the private sector can be a force for good in bringing about better quality of life sustainable growth and a low-carbon prosperity for all”

Ban Ki-Moon, UN Secretary-General



What's next?

- Let's use CO₂ as a raw material. We are developing a resin that contains 50% atmospheric CO₂
- Every day about half a billion people take DSM vitamins. But there are still 5.6 billion people who never take any...
- Nature takes 10,000 years to turn plant material into fossil fuel. DSM can do that in a week.

