Long term agribusiness outlook robust, short term challenges

1. Long term outlook for agribusiness remains robust
2. Global economy under pressure
3. Commodity price, farm profitability decline
4. Shrinking agribusiness profit pool

Our Ambition
Helping small and large farms meet the challenges of global food security

Our ambition is to bring greater food security in an environmentally sustainable way to an increasingly populous world by creating a worldwide step-change in farm productivity.

- **8M** large-scale farms >100 Ha
- **450M** smallholder farms ~2.0 Ha

With passionate people and a comprehensive capability

- **$1.4 billion** R&D investment in 2015 and more than **5,000** R&D staff
- Over **28,000** employees in some **90** countries
- **$13.4bn** sales in 2015

Supported in APAC by a broad reach of R&D

- **14 countries**
- **503 employees**
- **18 sites**
- **12,489 trials**
- **30+ crops over 5-6 seasons a year**
- **USD$43m**

With our strategy focused on creating value for growers

Create value for growers
Enhance value capture for Syngenta and channel partners

Think like a grower
Innovate
Outperform
Differentiate
Leverage
Our Offers

Developing offers on a global crop basis

- Corn
- Soybean
- Cereals
- Rice
- Sugar cane
- Diverse field crops
- Vegetables
- Specialty crops
- Lawn and Garden

With clear drivers for developing Crop Protection Products

- Labor shortage
- Regulations
- Crop intensification
- Change in farming practices
- Chemical resistance
- Breakdown of host plant resistance
- Climate variability and climate change
- New technologies – biologics and RNAi

Understanding the long path from a molecule to a product

- 100,000 molecules p.a.
- 5,000 product
- 30 years
- $250 million US

Support
Evaluation
Discovery
Profiling
And always ensuring product safety

To ensure that the use of our products do not result in harm to humans or the environment through:
Data Generation & Risk Assessment

In APAC, from global active ingredients we build leading brands and maximize the potential of technology...

Amistar® Technology
Chlorantraniliprole
Difenconazole
Thiamethoxam
Mefanoxam®
Paraquat
Cyantraniliprole

And outcompeting through an exciting Crop Protection pipeline

Fungicides
Insecticides
Herbicides
Seedcare

Year of launch 2012 2017 2022 2024

FORTENZA™DUO: Optimal crop establishment

Black Cutworm
Agrotis ipsilon

Untreated
Fortenza Duo

Plants damaged 75% Plants damaged 5%
22 days after planting 22 days after planting

Peak sales potential
>$500m $200m $100m
APIRO FORTE: Early post-em herbicide for transplanted rice

ADEPIDYN™: Broad spectrum fungicide for multiple crops

ISABION: Vegetables cold stress and transplanting shock

GroMore™: aligned to the life cycle of rice