



First quarter 2013 sales

April 18, 2013

Safe harbor

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First quarter 2013 highlights

- Integrated sales up 8% at constant exchange rates
 - volume +6%, price +2%
- Continued momentum, growth across all regions
- Reinforcing emerging market leadership:
 - Latin America, Eastern Europe, South East Asia
- Sales force fully integrated worldwide

First quarter 2013 regional sales: up 8 percent

North America: +6%

- Soil moisture improvement but low temperatures
- Record corn planting intentions
- Growers benefiting from high farm income

Europe, Africa & Middle East: +10%

- Cold, wet weather delays season start in some countries
- Further dynamic growth in CIS, SE Europe
- New product launches in France

Latin America: +14%

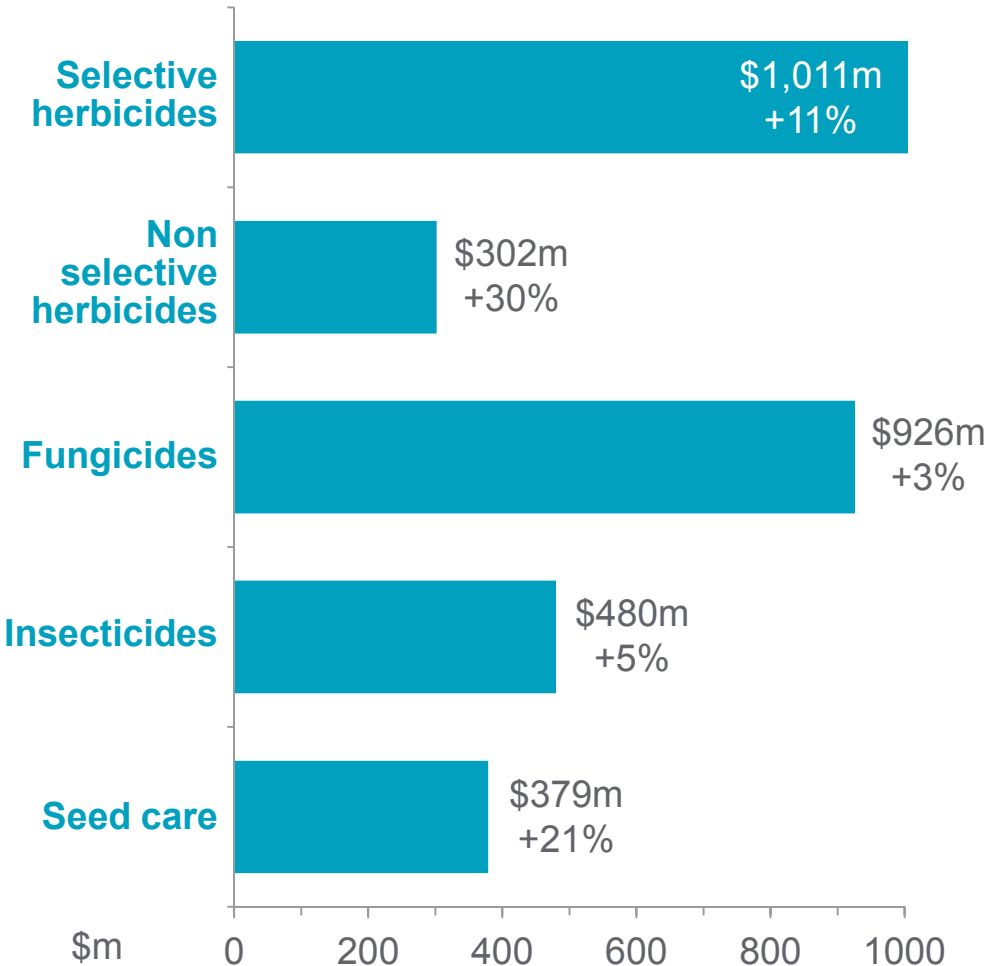
- Strong end to season
- Focus on fungicide applications
- Increased insect pressure in soybean and cotton

Asia Pacific: +2%

- Strong start in Thailand, Indonesia, Bangladesh
- Growing demand for treated corn hybrids, fungicides
- Drought delayed season in Australasia

Growth at constant exchange rates

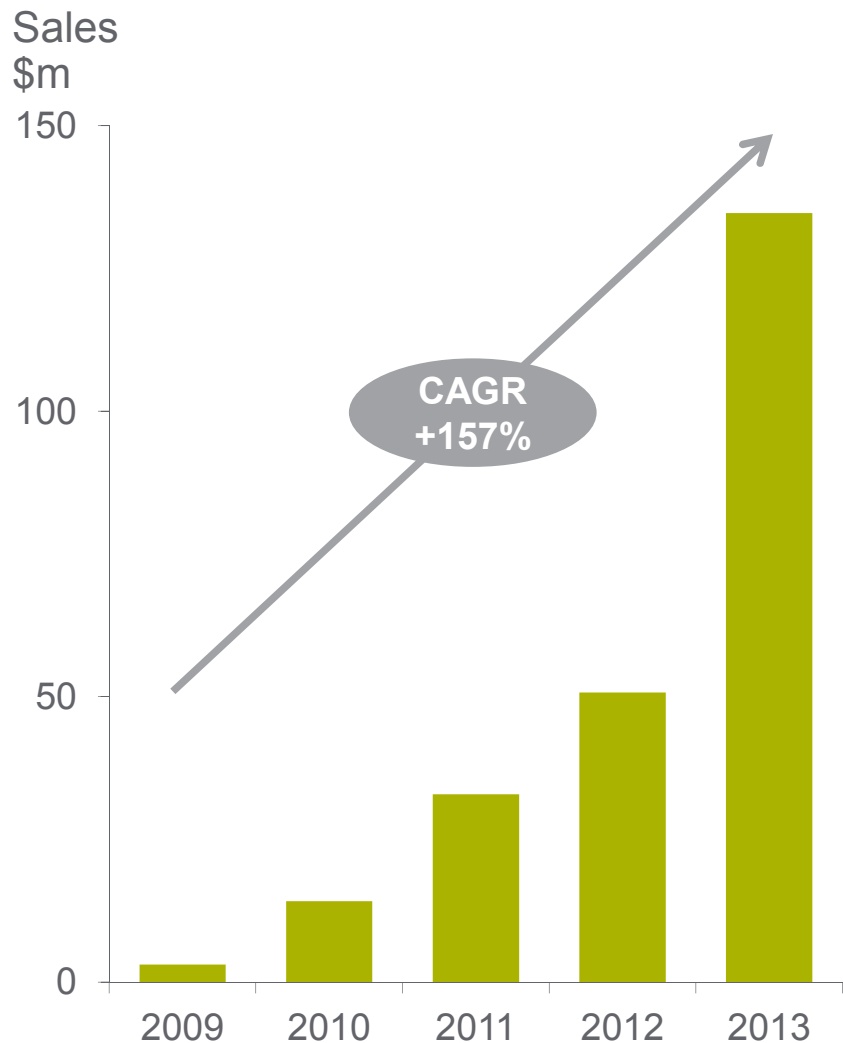
Crop Protection: Q1 sales up 10 percent






- Leading corn portfolio, AXIAL up >20% in all regions
- TOUCHDOWN volume and price
- Brazil up >30%; northern Europe, USA lower
- Strong growth Brazil; resistance management USA
- VIBRANCE launch; emerging markets drive CRUISER

Chart excludes 'Other': \$27m (-28%)
Growth at constant exchange rates

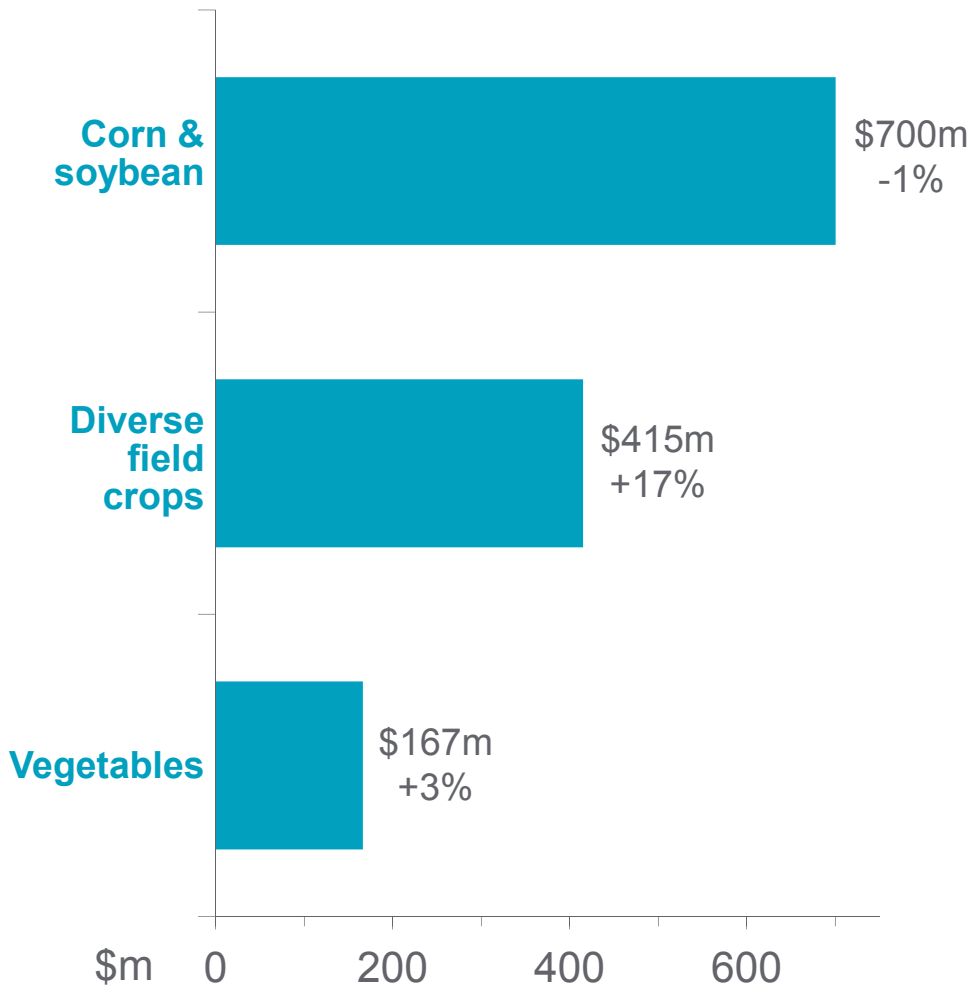
Crop Protection portfolio: new product highlights



% at constant exchange rates

-  **Durivo**[®]: sales doubled in Brazil; continuing adoption in Asia Pacific
-  **Seguris**[®]: full EU registration
-  **Vibrance**[™]: first launch North America, sales >\$50 million
- Solatenol[™]: first sales in Paraguay
- Combined peak sales potential: >\$1.2bn

Seeds: Q1 sales up 5 percent



Growth at constant exchange rates

- Sales up 2% adjusted for MIR604 licensing income
- Drought impact on production
- Strong growth in CIS, Asia Pacific

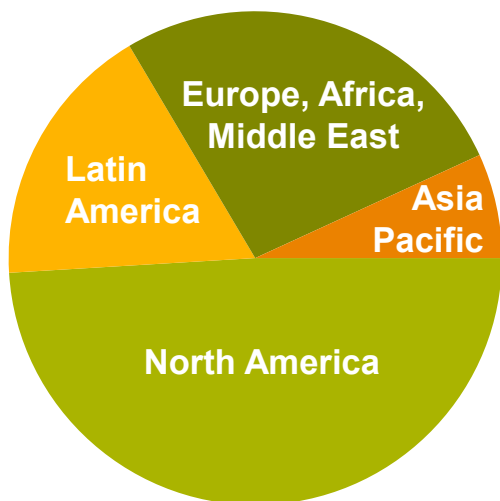
- Sunflower growth; lower sugar beet acres

- Market rebound in the Americas, Asia Pacific
- European consumers still cautious

Integration driving global Corn growth

2012/13 season

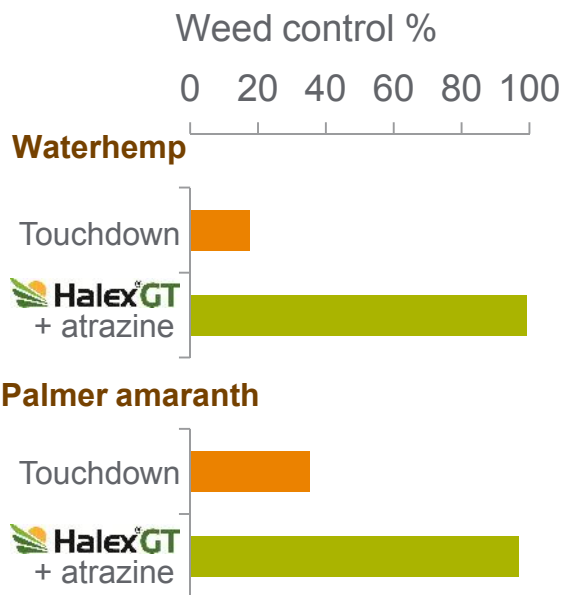
Germplasm diversity



Total Corn seed sales
\$800 million, +8% CER*

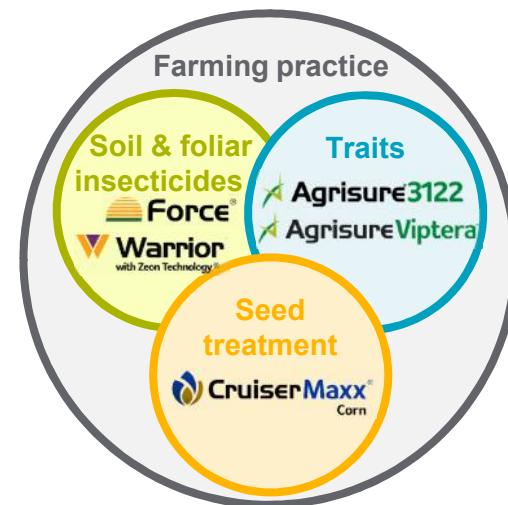
* Excluding DuPont Pioneer royalty

Weed resistance management



Total Corn herbicide sales
\$915 million, +39% CER

Integrated insect control



Total Corn insecticide sales
\$139 million, +34% CER

AgrisureDuracade™: a new standard for corn rootworm control

RIB solutions

2010 2011 2012 2013 2014 2015

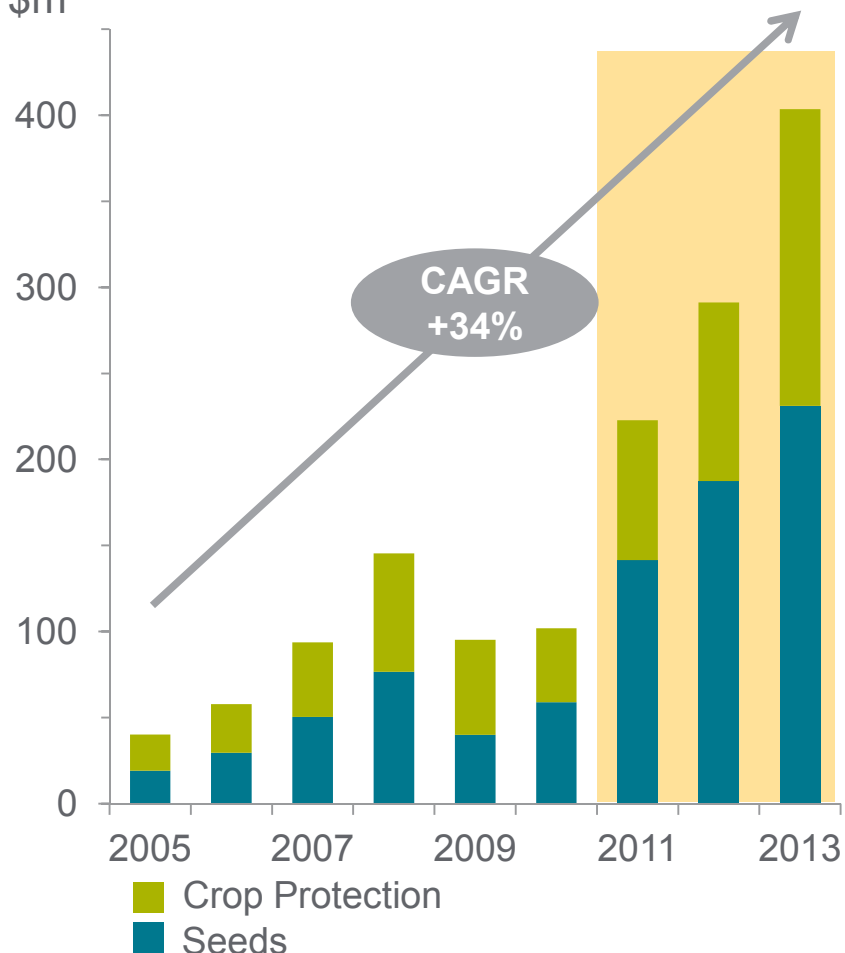


5% RIB: best agronomic practice

- USDA approval received: launch for 2014 season
- Fourth proprietary corn trait introduction in six years
- Stacks with AGRISURE RW: different mode of action
- Tenfold reduction in Western corn rootworm beetle emergence
- Enhanced RIB options including VIPTERA

Integration driving growth in the CIS

Q1 sales
\$m

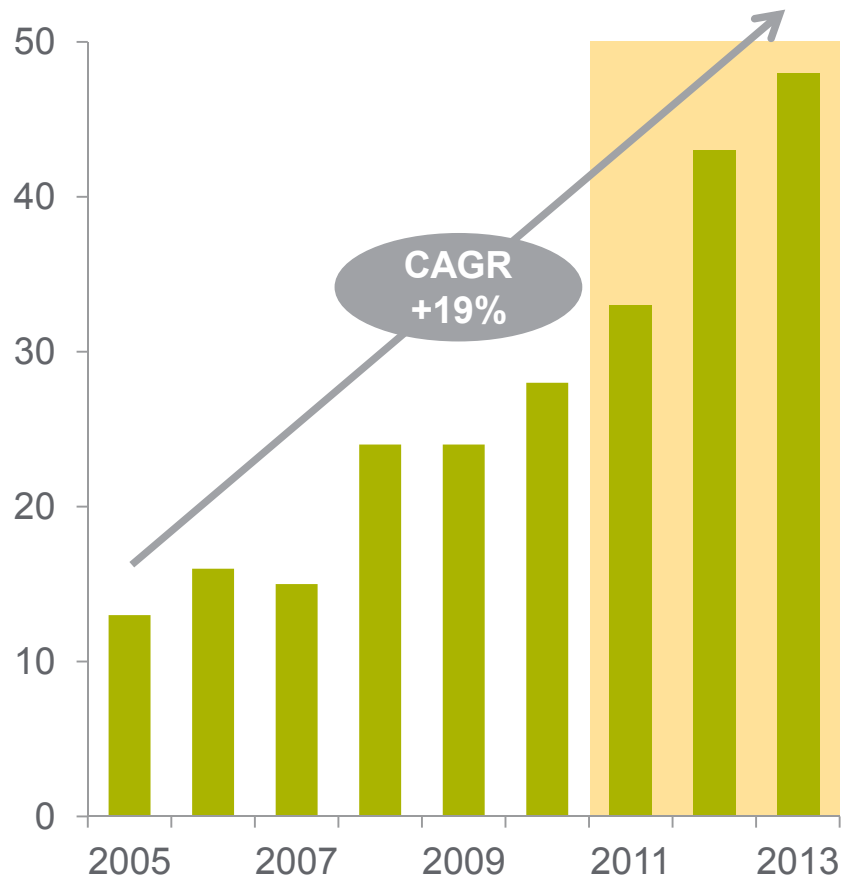


Growth at constant exchange rates

- Leading sunflower seeds portfolio
- New corn hybrids delivering enhanced yield
- 2nd year of integrated sales force
- CP growth across all product lines
- Sales up tenfold since 2005

Integration driving growth in South East Asia: Indonesia example

Q1 sales
\$m

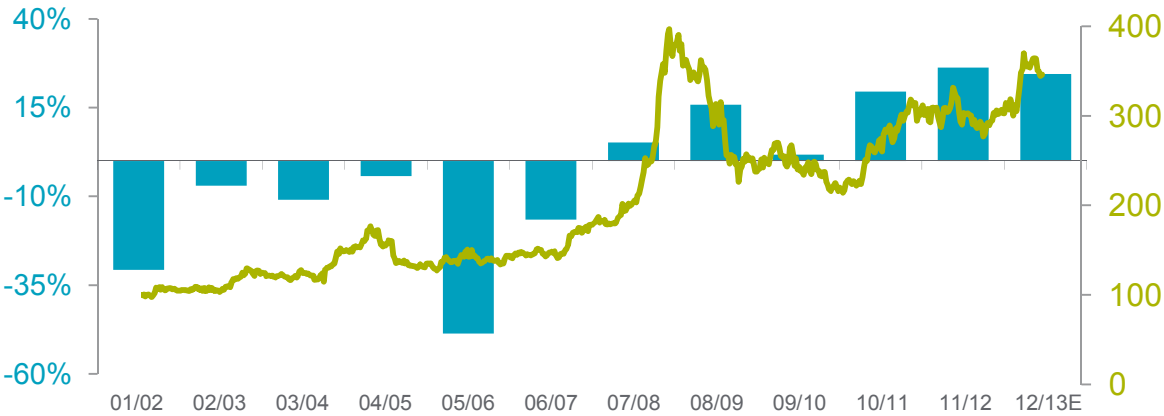


- Integration building on early footprint
- Strong retail presence
- StartRight 45 day solution for Corn growers
- Rapid expansion in Vegetables
- Significant Rice potential with  GroMore™ solution

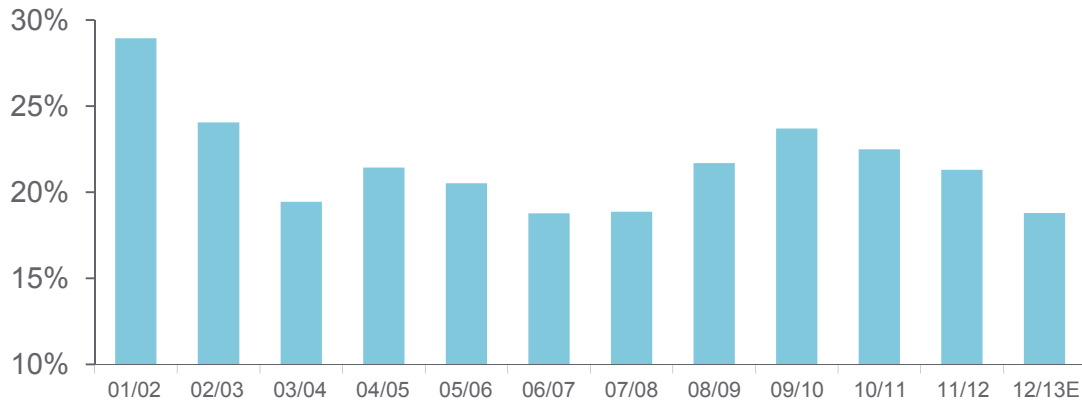
Growth at constant exchange rates

Robust farm economics

Farmer profitability*
US Corn



Stocks-to-use ratio**



- Robust farm incomes supporting investment
- Global grain supply remains tight
- Ongoing growth in demand
- Productivity drive in emerging markets

* Net income margin excluding government payments

** Corn, soybean, rice, wheat

Source: USDA; Bloomberg, Syngenta

Full year outlook

- High grower profitability, integration momentum
- Sales growth in line with long-term target
- Currencies and raw materials neutral, seed production costs higher
- Focus on cost efficiency
- Significant free cash flow generation

Bringing plant potential to life