



2017 Full Year Results

Update to Media – 15 February 2018

Erik Fyrwald, Chief Executive Officer
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Classification: PUBLIC

Safe Harbour

Cautionary Statement Regarding Forward-Looking Statements

This document contains forward-looking statements, which can be identified by terminology such as 'expect', 'would', 'will', 'potential', 'plans', 'prospects', 'estimated', 'aiming', 'on track' and similar expressions. Such statements may be subject to risks and uncertainties that could cause the actual results to differ materially from these statements. For Syngenta, such risks and uncertainties include risks relating to legal proceedings, regulatory approvals, new product development, increasing competition, customer credit risk, general economic and market conditions, compliance and remediation, intellectual property rights, implementation of organizational changes, impairment of intangible assets, consumer perceptions of genetically modified crops and organisms or crop protection chemicals, climatic variations, fluctuations in exchange rates and/or commodity prices, single source supply arrangements, political uncertainty, natural disasters, and breaches of data security or other disruptions of information technology. Syngenta assumes no obligation to update forward-looking statements to reflect actual results, changed assumptions or other factors.

Syngenta – a leading agriculture technology company



#1 in Crop Protection and #3 in Seeds

Bringing innovation to serve farmers all over the world



\$12.65B annual revenue
>50% emerging markets



~27,400 employees
across 90+ countries



Broadest portfolio in the industry

Crop Protection, Seedcare, Pest Control, Seeds, Biotechnology Traits

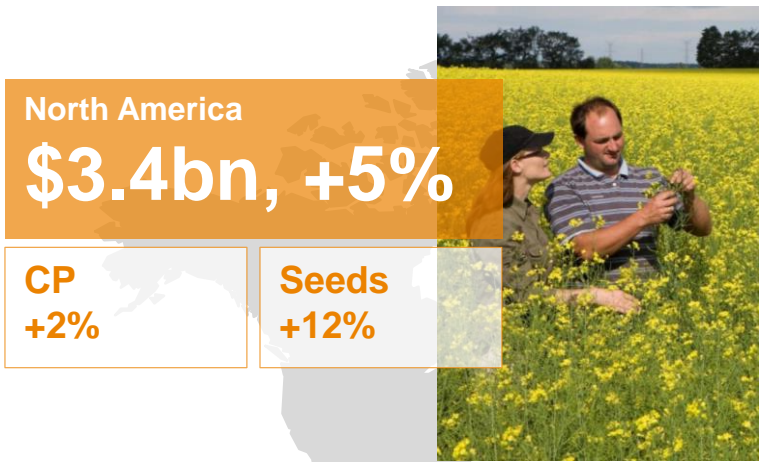


Key R&D sites in US, EU, and China

\$1.3B per year R&D spend

Full year results 2017: regional overview

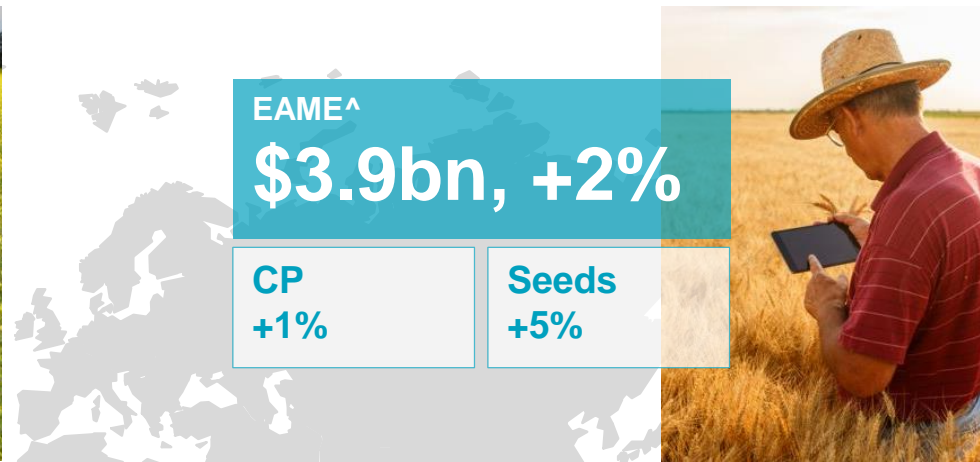
Regional sales: \$12bn, -1%*



North America
\$3.4bn, +5%

CP +2%	Seeds +12%
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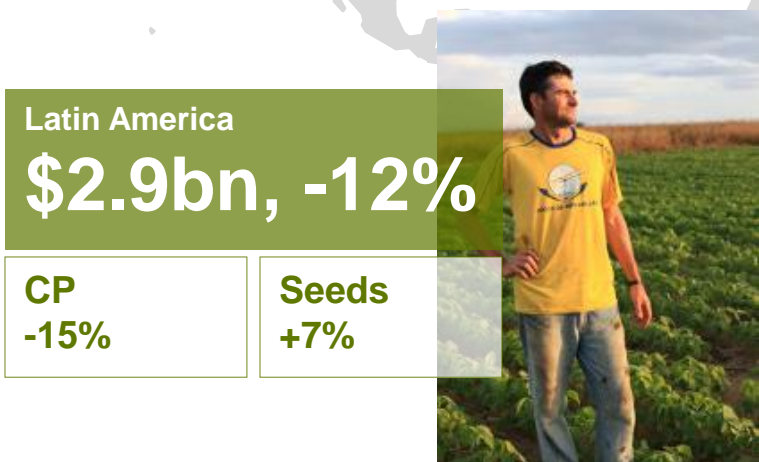
A photograph of a man and a woman in a field of yellow flowers, possibly rapeseed, examining a plant.



EAME[^]
\$3.9bn, +2%

CP +1%	Seeds +5%
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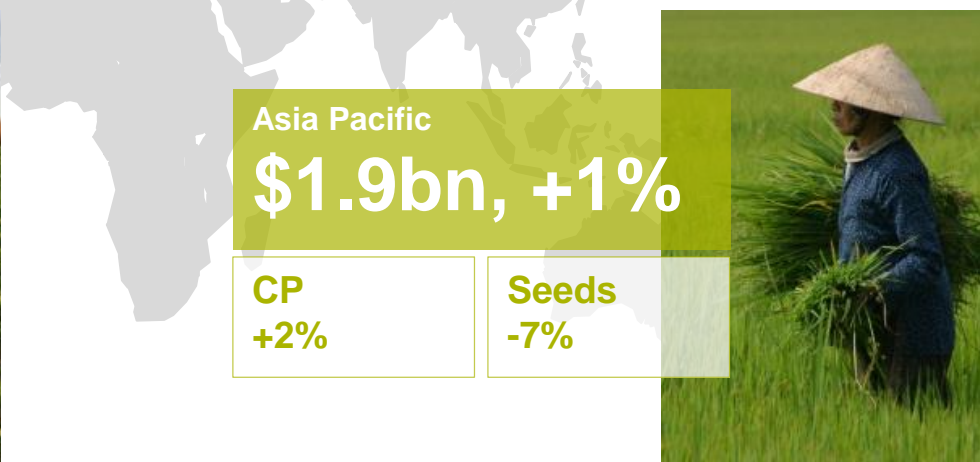
A photograph of a man wearing a straw hat and a red shirt, looking at a tablet in a field of golden wheat.



Latin America
\$2.9bn, -12%

CP -15%	Seeds +7%
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A photograph of a man in a yellow t-shirt standing in a field of green crops.



Asia Pacific
\$1.9bn, +1%

CP +2%	Seeds -7%
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A photograph of a person wearing a conical hat, working in a lush green rice paddy field.

* Growth at reported rates vs. 2016; [^]Europe Africa & Middle East

Full year results 2017: Crop Protection sales

\$9.7bn, -3%*

North America

\$2.4bn, +2%

Continued success with new products

Increased generic pricing pressure

Corn area reduction; partial recovery from delayed planting; lost acres and sprays

EAME[^]

\$2.9bn, +1%

Continued strong demand in Russia & CIS, Europe South East

Successful product launches in Western Europe

Adverse spring weather impact in Western Europe cereals market

Controls

\$495m, +4%

Strong Vector Control sales in Africa Middle East

Solid sales growth continued across most markets

Strong demand for professional pest management products

Latin America

\$2.4bn, -15%

Product repositioning

High channel inventory in Brazil; addressed in Q4

Paraguay intense generic pressure

Asia Pacific

\$1.6bn, +2%

Good growth in ASEAN

Corn area reduction in China

High channel inventory, low insect pressure and low liquidity impacting India

Seedcare

+5% (sales of \$1055m incl. in CP sales)

Brazil: strong seedcare performance

Europe strong sales in hybrid crops

Expansion in Africa, India, LAN[^]

* Includes sales to seeds; Growth at reported rates vs. 2016; [^]Europe Africa & Middle East, LAN = Latin America North

Full year results 2017: Seeds sales

\$3.0bn, +6%*

North America

\$1.0bn, +12%

Corn share gain
Alliances to strengthen corn
Canada Soybean growth
Duracade royalty

EAME[^]

\$1.0bn, +5%

Strong Sunflower performance in CIS and South East Europe
Low yields and commodity pricing impacting Cereals sales
Strong Vegetables performance across the Region

Flowers

\$186m, Flat

Increased sales of Young Plants in EAME
Delayed seeds ordering in North America

Latin America

\$481m, +7%

Brazil corn successful second season
Mexico strong Vegetables performance
Sunflower momentum in LAS[^]
Royalties upside

Asia Pacific

\$281m, -7%

Severe competition in Philippines corn
Low vegetable prices and difficult market conditions in South Asia
Low crop prices in Thailand

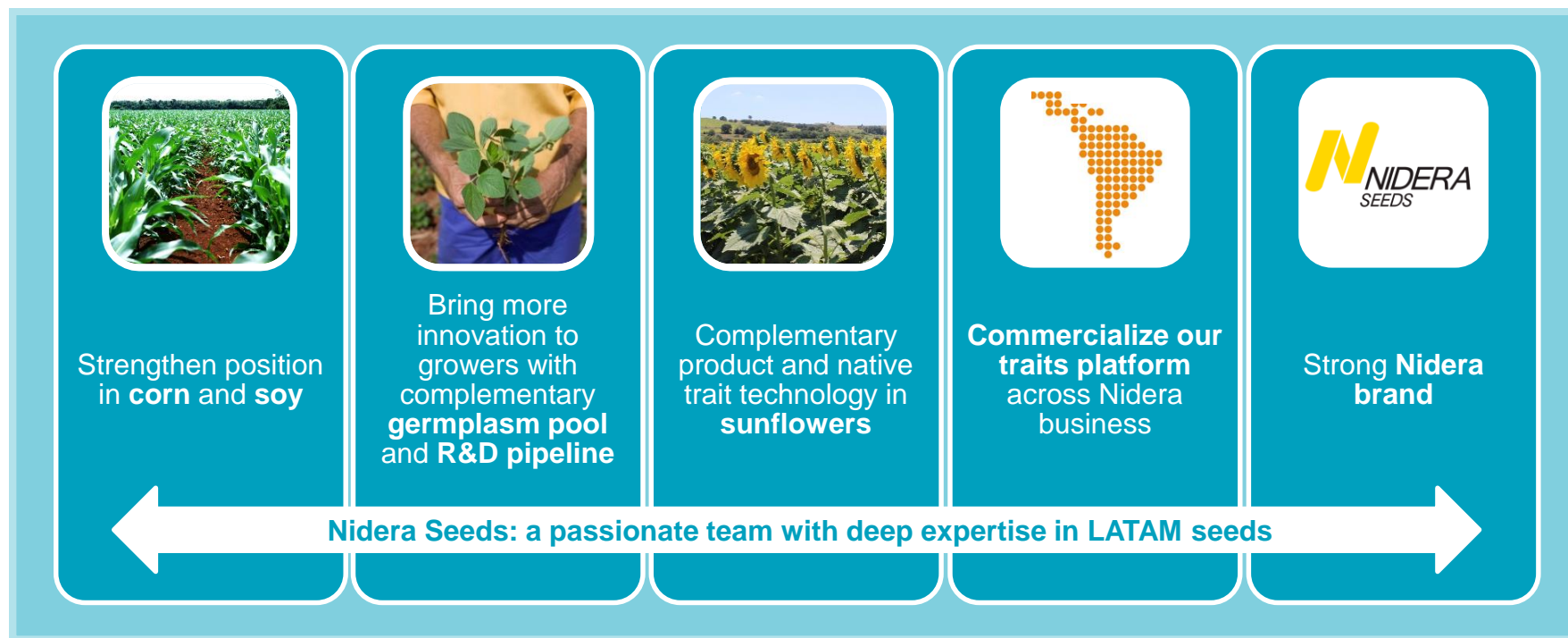
Vegetables

+1% (sales of \$622m incl. in Seeds sales)

Strong growth in EAME and LATAM[^]
South Asia affected by low crop prices

Nidera Seeds – strategic acquisition for Syngenta

Latin America is a big growth opportunity, and Corn and Soybean are priority crops. This acquisition is core to our Seeds strategy and ambition to grow from a distant #3, to a strong #3



Crop Protection innovations launching around the world

ADEPIDYN™

New broad spectrum fungicide delivers a step-change in leaf spot control and excellent control of powdery mildew in many crops

Highly effective against difficult to control diseases (i.e. Fusarium Head Blight, Botrytis)

Key crops: canola, cereals, corn, soybean, specialty, vegetables



Controlling powdery mildew

SOLATENOL™

Potent SDHI active ingredient treating the most important and damaging diseases of cereals, including Septoria and Rust

Provides long-lasting control

Wide range of major crops including soybeans, cereals, vegetables and specialty crops



Treating septoria

ACURON®

Corn herbicide based on a new chemical combined with three other active ingredients

Improves control of more than 70 increasingly difficult to manage weeds (i.e. Palmer amaranth, giant ragweed)

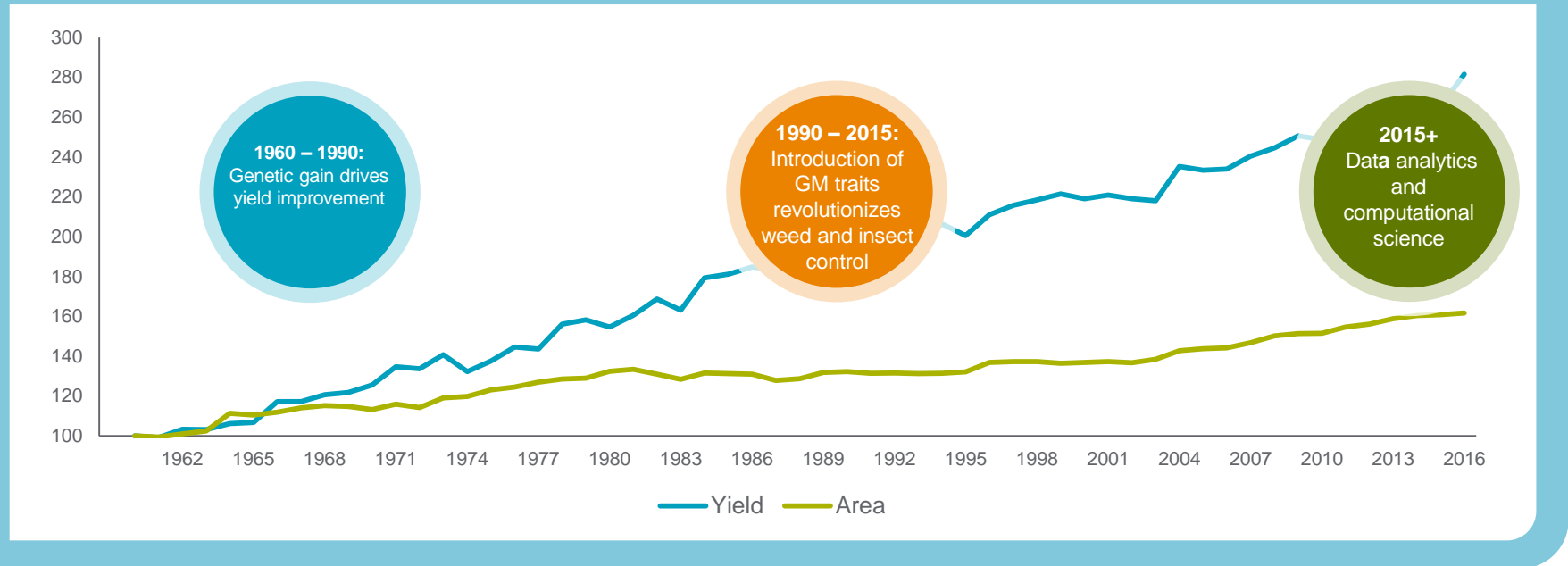


Controlling giant ragweed

Technology in seeds drives yield gain

Reducing need to cultivate more acres

Index 100: 1960



Strong commitment to sustainability

- New Chief Sustainability Officer
- New partnership with USAID to help smallholders in Africa, Asia and Latin America
- US Sustainability Prize:
 - Received the 2017 Collaboration of the Year Award with The Nature Conservancy and Kellogg's from the Alliance for Sustainable Agriculture
- Work started to expand our GGP commitment: link Syngenta ambition to our business strategies

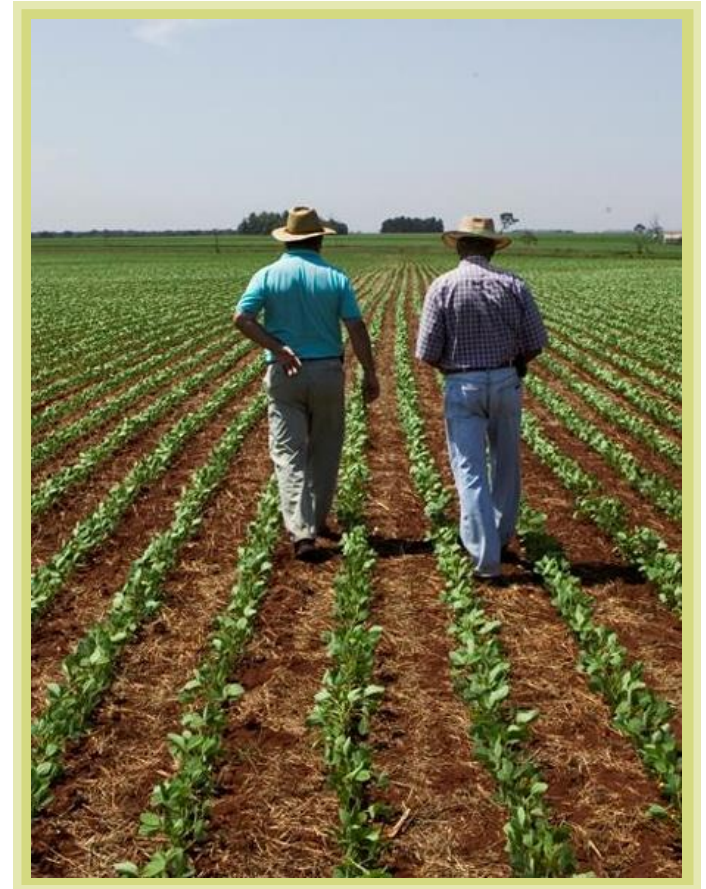


2018 Outlook

- Farm economics remain challenging
- Focus on customer

- Drive new innovation
- Deliver pipeline

- Strong free cash flow generation
- Low single digit sales growth



Bringing plant potential to life