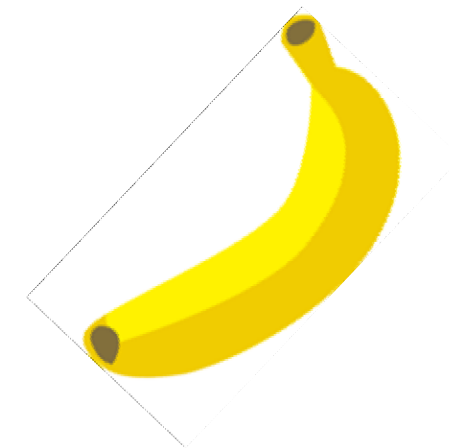

Specialty Crops

Presented by:

Mark Bidwell

Global Head Specialty Crops



December 4, 2013

syngenta

Syngenta's \$2bn Specialty Crops business is market leader

Potato



Pome



Cotton



Citrus



Banana



Grape

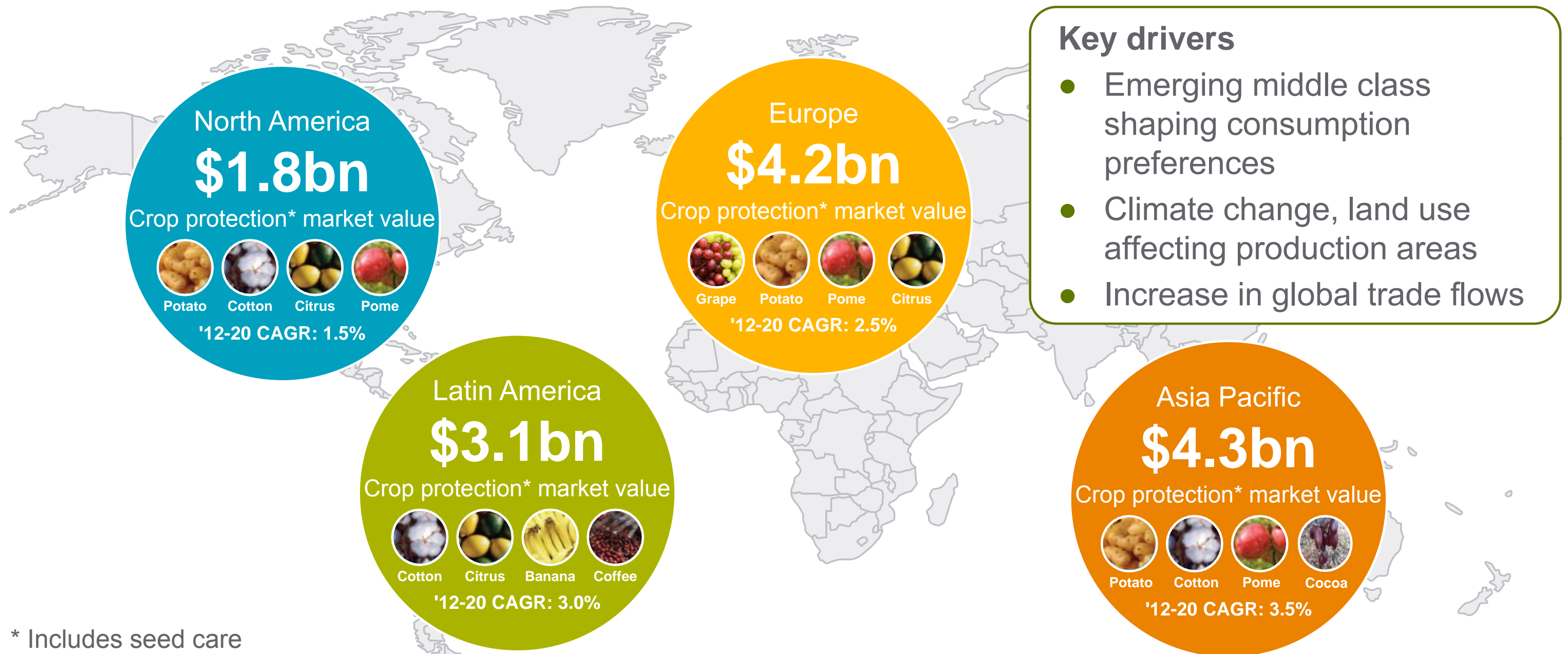


Cocoa



Coffee

Specialty Crops: a \$13.5bn market opportunity underpinned by solid growth drivers

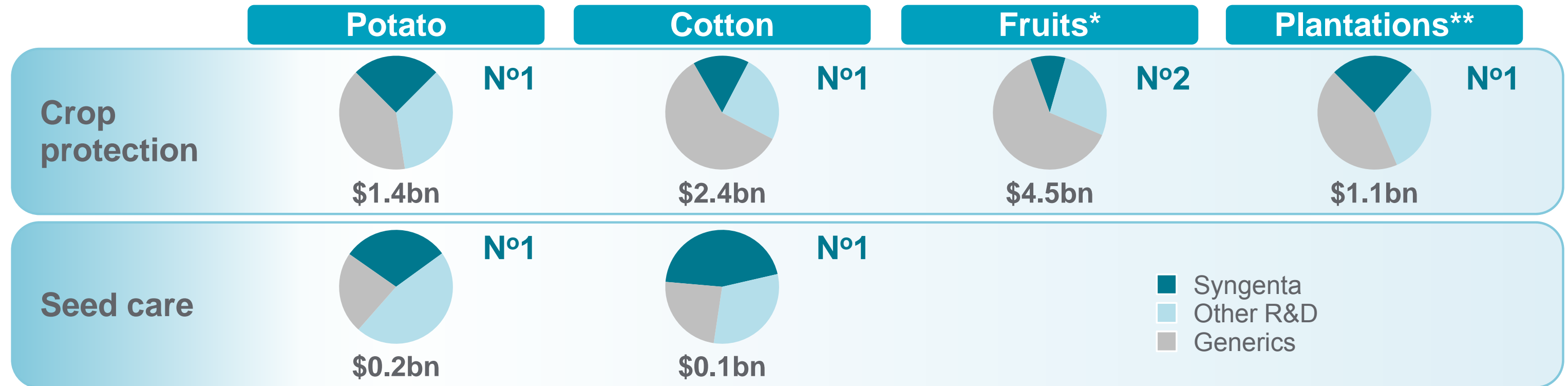


* Includes seed care

Source: Phillips McDougall, Syngenta estimates

Syngenta with leading position in main crops

2012 global market size



- Wide crop, geography coverage
- Proven and trusted brands
- Broad, deep agronomic expertise
- Strong relationships with growers, value chain

* Fruits include pome, citrus, grape ** Plantations includes coffee, cocoa, oil palm, banana

Source: Phillips McDougall, Syngenta estimates

Three elements to the growth strategy

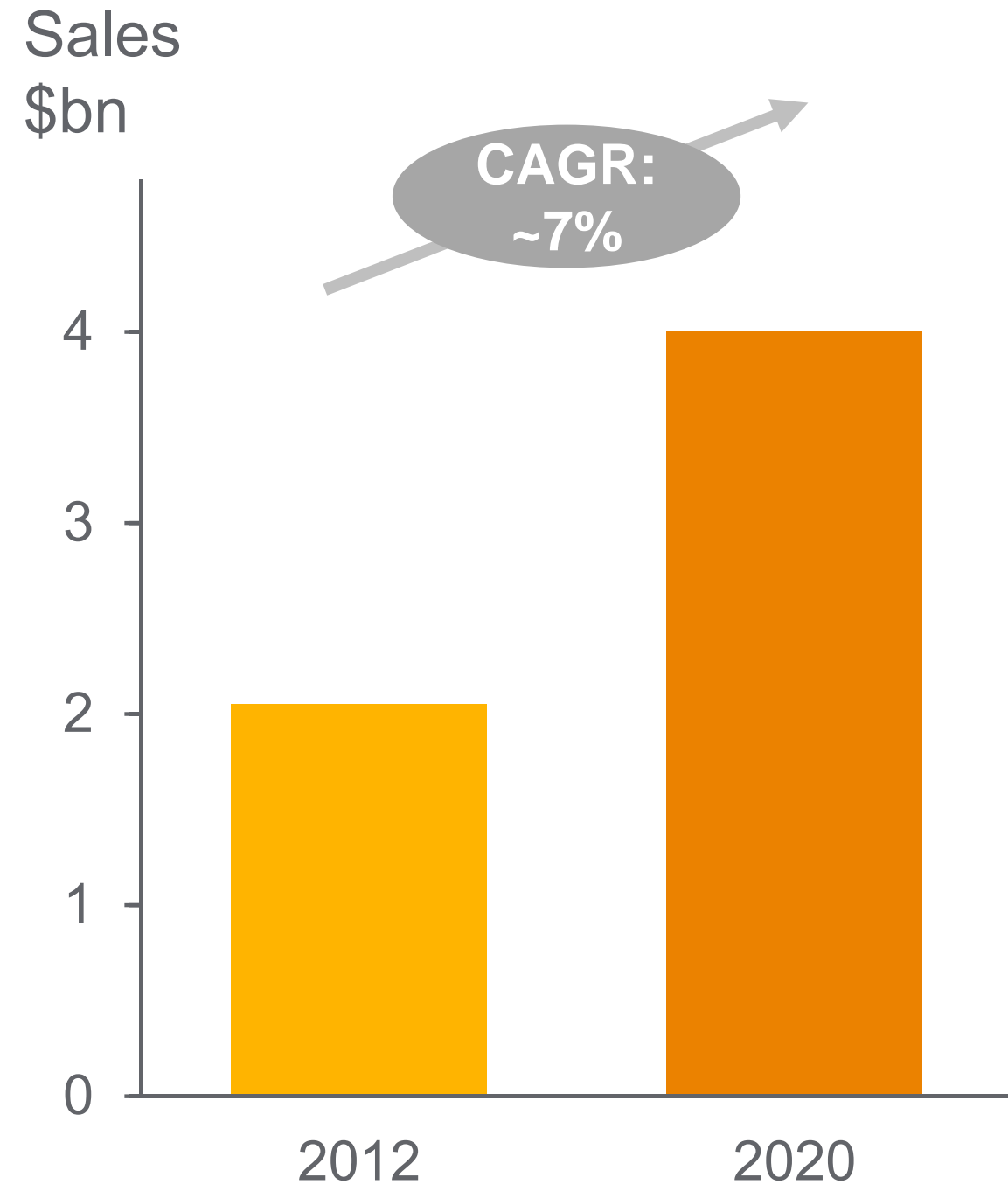
Leveraging blockbuster chemistries

Integrated offers

- Potato healthy tubers
- Fruits quality contract
- Cotton fast start performance
- Plantations sustainable productivity
- Young tree care

New business models

- Expansion into new geographies



Leveraging blockbuster chemistries: positions Syngenta for long-term growth

Portfolio and pipeline

Portfolio broad and deep:



Pipeline strong and innovative:

Cyantraniliprole,
Solatenol[™];
Oxathiapiprolin



In-licensing 3rd party products for integrated offers

Biologicals:



Abiotic stress management:



Partnering with seeds companies

Cotton:



Potato:

seed producers;
technologies



* TMG is a former FMT brand

Biologicals: key to continued leadership and enabling comprehensive integrated offers

Biologicals play increasingly important role in agriculture

- Meets value chain requirements
 - Improved public perception
 - Enhanced resistance management
 - Reduced time to registration
- All drivers relevant across Specialty Crops
 - fruit market leads opportunity
 - \$250m sales targeted in 2020

Focus on Biological pipeline to enable integrated offers*

Potato healthy tubers

Fruits quality contract

Cotton fast start performance

Plantations sustainable productivity

Young tree care

 Taegro®  Sakalia™

 Dardo®  Clariva™  Bioline™

 Isabión®  Quantis

* New products sourced by in-licensing and acquisition

Potato healthy tubers: increasing yields in China

Current practice

Integrated solution



Healthy seed

- Seed partnerships



Seed care



Crop protection

- In-furrow
- Foliar



Food chain

- Partnerships with processors

* Based on 200 trials in China 2011-13

** Based on incremental spend vs. standard

Fruits quality contract: enabling growers to meet changing market requirements

solutions progrès
Contrat Qualité Vigne

Conformité de votre vin à vos ambitions
 Sécuriser vos débouchés
 Sérénité pour votre culture
 Tranquillité d'esprit

- Guarantees efficacy and crop safety
- Ensures sustainability compliance
- Assures market access

syngenta

Customized program

Downy mildew	RidomilGold®	Pergado®	
Powdery mildew	Topas®	Dynali®	Sakalia™
Botrytis	Switch®	Geoxe®	Sakalia™
Berry moth	Affirm®		
Hoppers	Actara®		

May June July August

Sustainability services

- Enhanced biodiversity
- Reduction in post harvest waste
- Improved worker safety

Contract

- Market access assured or money back

Cotton fast start performance: improving yield and grower profitability in leading geographies

Current practice

Integrated solution



Seed care

 **Avicta[®] Complete**
Cotton

 **Cruiser[®]**

Crop protection

 **Polo[®]**

 **Gramoxone[®]**

 **Quadris[®]**

 **Actara[®]**

Adjacent technologies

- Water, nutrition management

Services

 **AgriEdge Excelsior[®]**

* Based on 120 trials in India 2012

** US & India based on incremental spend vs. standard

Plantations sustainable productivity: crop solutions that address market needs

Banana




- Increased productivity and profitability
- Reduced disease management uncertainty, environmental impact


Root health

- Vigor and protection  **Reflect Xtra**  **Solvigo**

Sustainable Sigatoka control

- New mode of action, mixtures, biocontrols integrated spray programs  **Boost**

Services & adjacent technologies

- Environmental maps, crop management solutions  **Skan**

Cocoa



- Plantation yield: +20%
- Accelerated grower returns: payback after Yr 1 (vs Yr 3 standard)

Crop protection

- Optimized CP program, supported by Syngenta learning centers, lead farmers

Partnerships

- Value chain engagement

Intercropping

- Pre-bearing intercropping with maize

Young tree care: integrating technologies to deliver healthier trees and enhanced yields

Untreated Treated*



Crop protection



Adjacent technologies

- Biostimulants  **Isabión**

Services

- Pest and disease monitoring

Expansion

- Potential in other plantation and perennial crops

- Accelerated and increased initial yields
- Improved risk management
- Increased grower ROI

* Brazil citrus

Pests and diseases, a clear and present danger to crops

The New York Times

Citrus Disease With No Cure Is Ravaging Florida Groves

 REUTERS

Central American coffee farmers fear ruin from rust fungus

 CenárioMT.com.br

CENÁRIO AGRÍCOLA :: HELICOVERPA

Governo decreta estado de emergência e libera importação de defensivos contra praga

 USA TODAY

Cotton farmers in Southeast face a foe in pigweed

DIGITAL JOURNAL

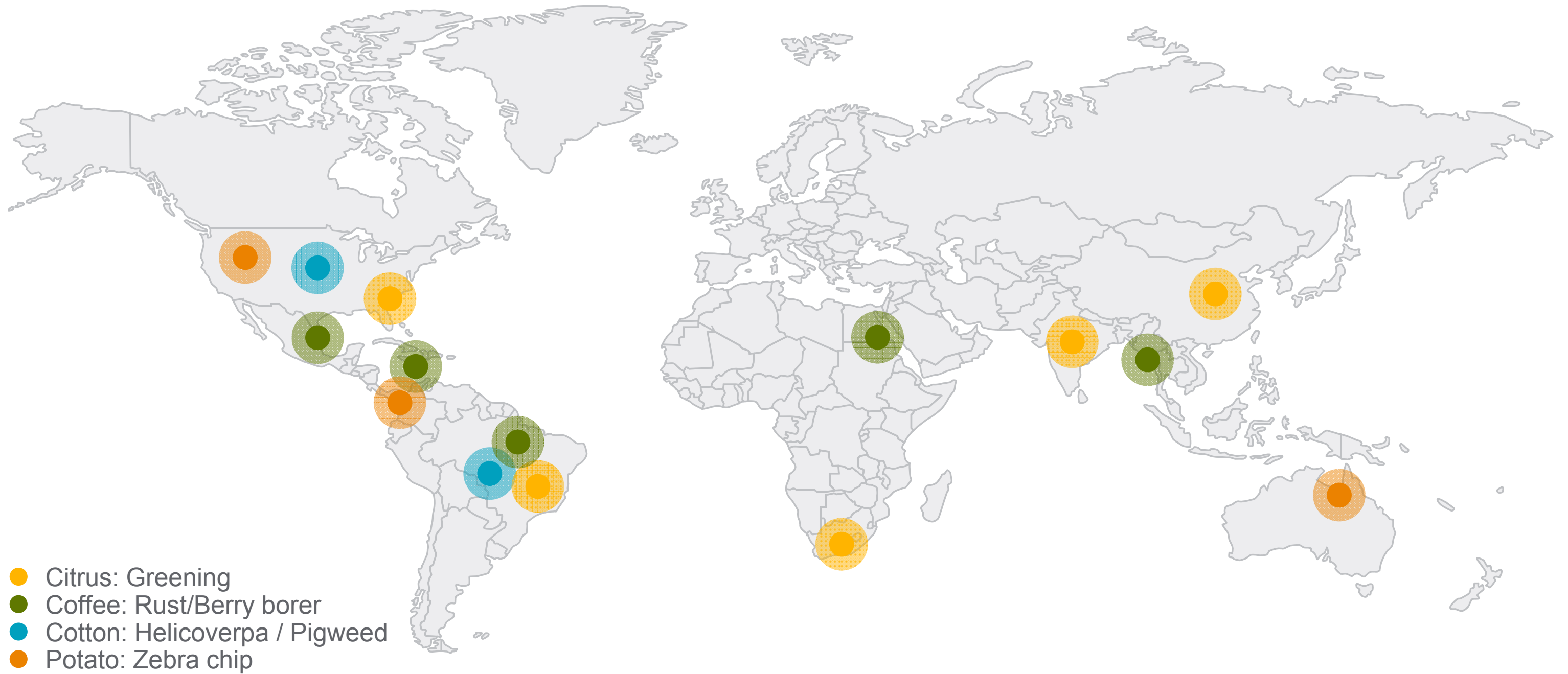
Zebra Chip Threatens Potato Chip Industry

 FT
FINANCIAL
TIMES




















January 4th, 2013





The great vine decline

Syngenta's CP asset base, offering solutions against evolving threats

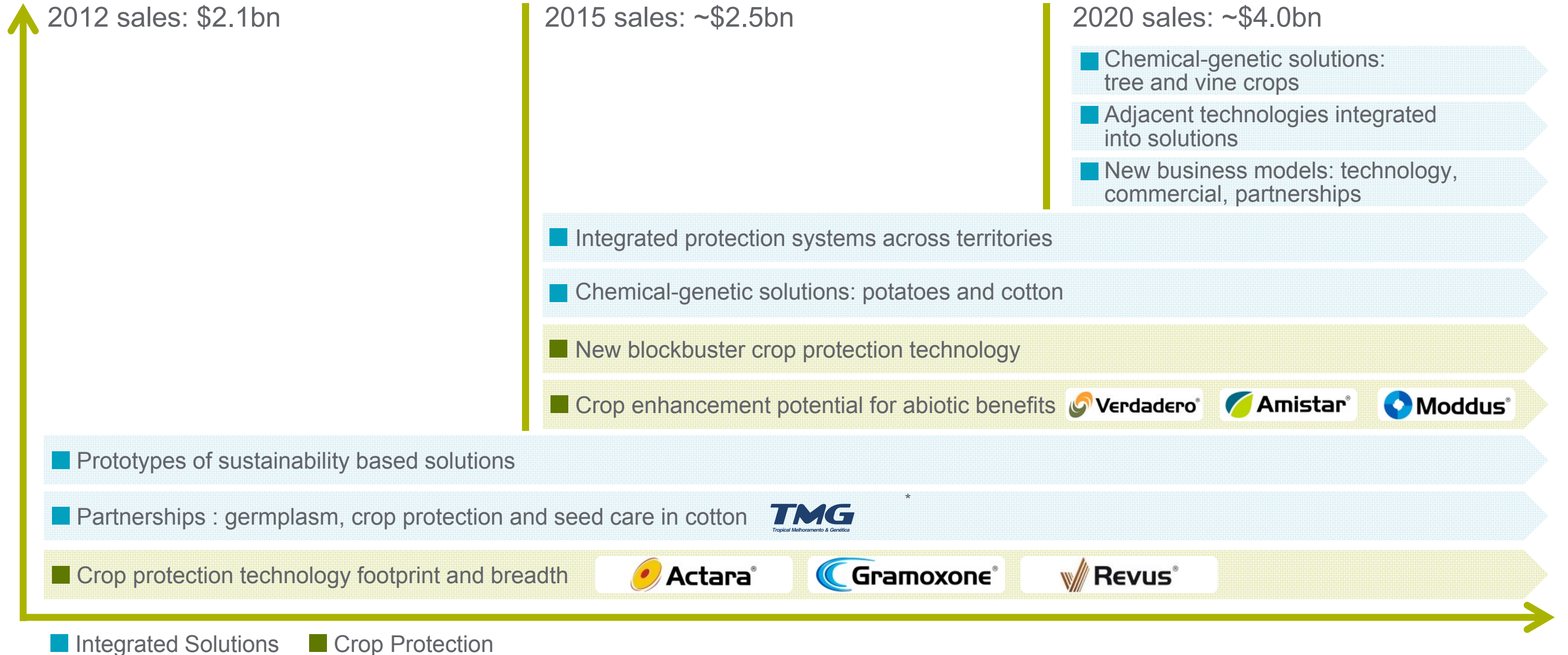


Syngenta's CP asset base, offering solutions against evolving threats

Expanding diseases	Solutions	
	Portfolio	Pipeline
Citrus: Greening	  	Young Tree Care: Cyantranilprole, Rnai
Coffee: Rust/Berry borer	   	 
Cotton: Helicoverpa / Pigweed	  	 
Potato: Zebra chip	    	

-  Citrus: Greening
-  Coffee: Rust/Berry borer
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Specialty Crops pipeline



* TMG is a former FMT brand

Potato



Pome



Cotton



Citrus



Banana



Grape



Cocoa



Coffee



Bringing plant potential to life