



First quarter 2010 sales

April 15, 2010

Safe harbor

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First quarter 2010 highlights

- Sales down 8%* at \$3.5 bn
 - reported sales down 3%: weaker dollar
- Strong Latin America performance
- Northern hemisphere
 - late start, cautious channel behavior
 - France, US: lower prices
 - season now well underway

* At constant exchange rates

Market update

NAFTA:

- Late start, high channel inventory
- Glyphosate price
- Acreage shift: from wheat into corn and cotton, soybean flat

Latin America:

- Improved weather, increased disease pressure
- Greater usage intensity

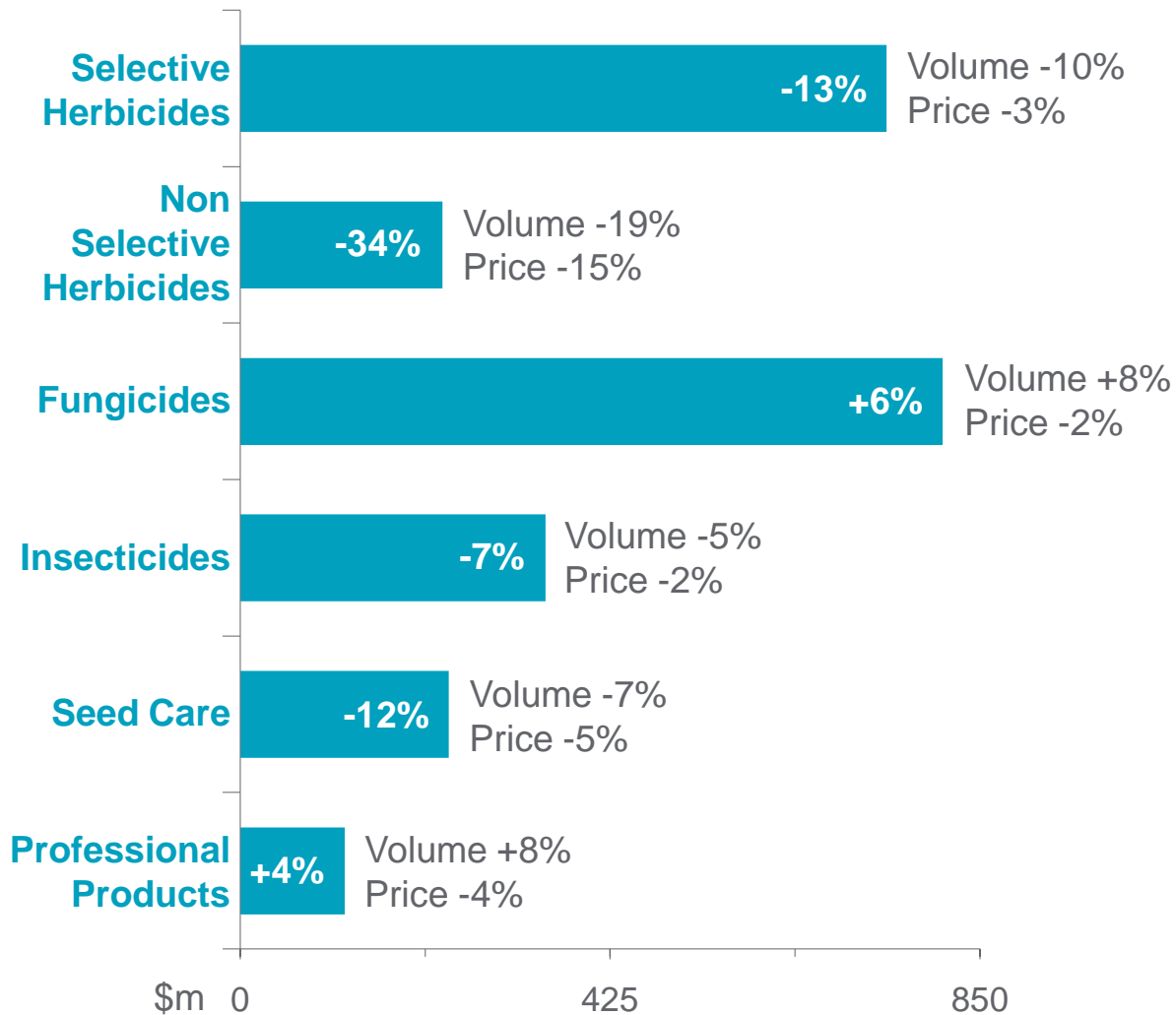
Europe, Africa & Middle East:

- Prolonged winter
- WE: delayed start, crop quality most important driver
- EE: improving environment, continuing focus on grower credit

Asia Pacific:

- Government focus on agriculture
- Emerging market growth

Crop Protection sales: \$2.5 bn down 8%



- Channel inventory, lower pricing; phasing in France and Germany
- TOUCHDOWN prices, high US channel inventory
- LATAM, NAFTA growth
- ACTARA, DURIVO growth; competitive environment for older chemistries
- LATAM, APAC double digit growth; higher US treated seed inventory
- Early recovery in consumer-led sector

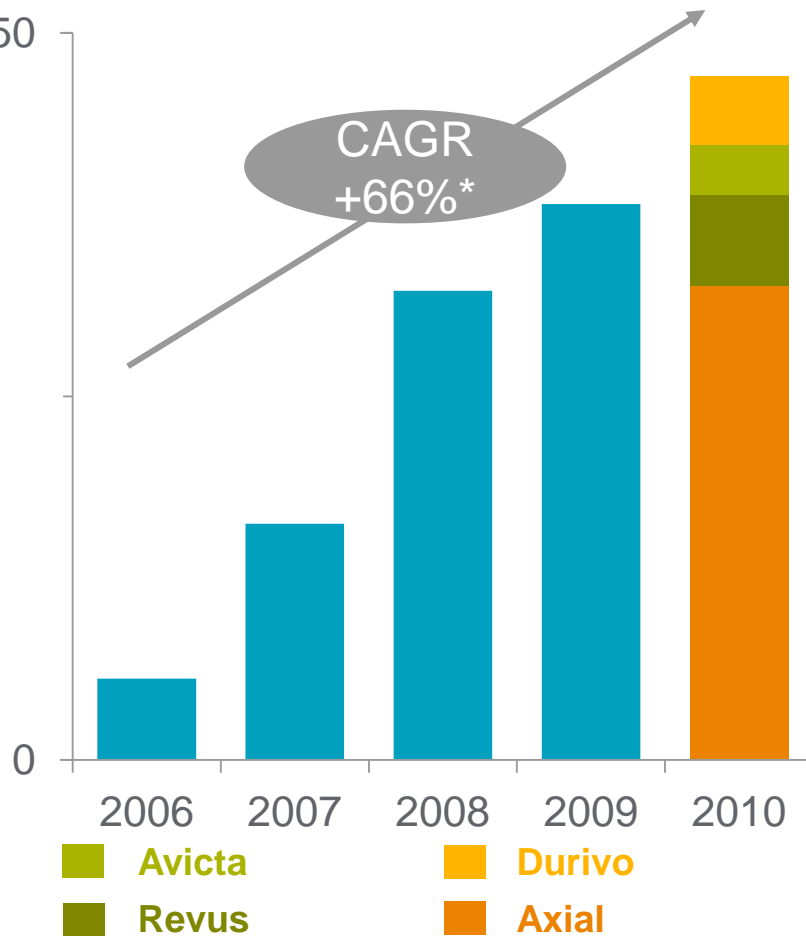
Chart excludes 'Other': \$18m (+54%)
Growth at constant exchange rates

New products sales up 13%*

Q1 sales

\$m

150



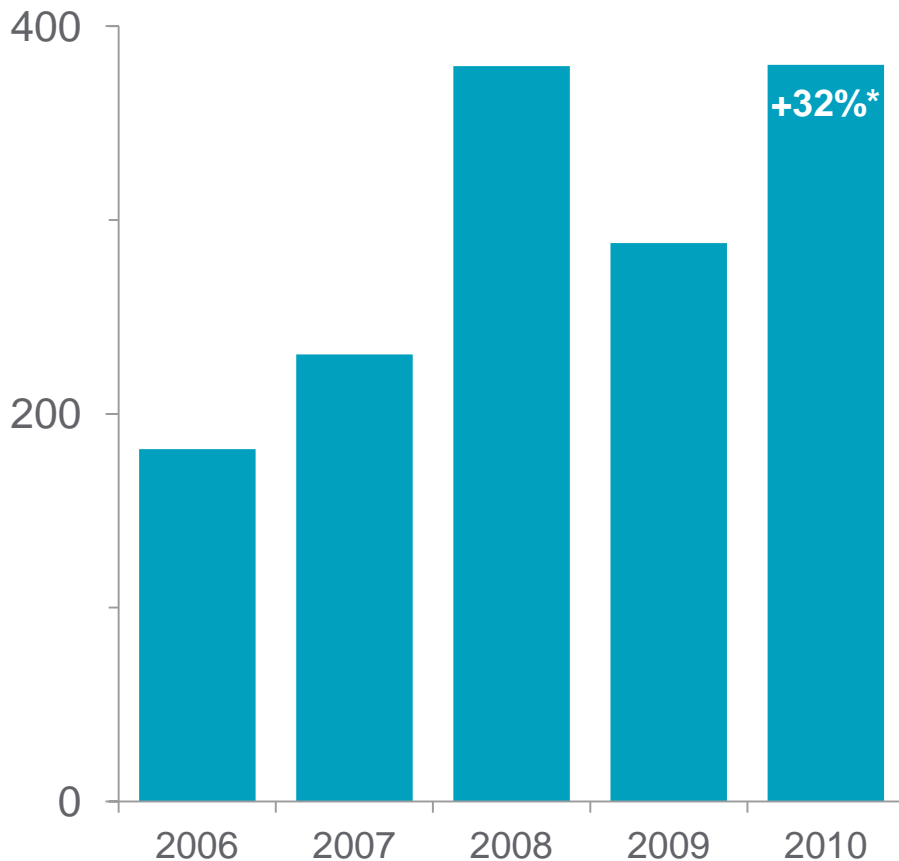
* At constant exchange rates

- **Durivo**: strong growth, broad reach across crops, geographies
- **Avicta Complete** Corn: launch in US corn
- **REVUS** **AXIAL**: further growth potential
- **Invinsa**: granular formulation introduction in Malaysia, Pakistan
- **Isopyrazam**: first approval in UK on barley

Latin America: leading offer, market outperformance

Q1 sales

\$m



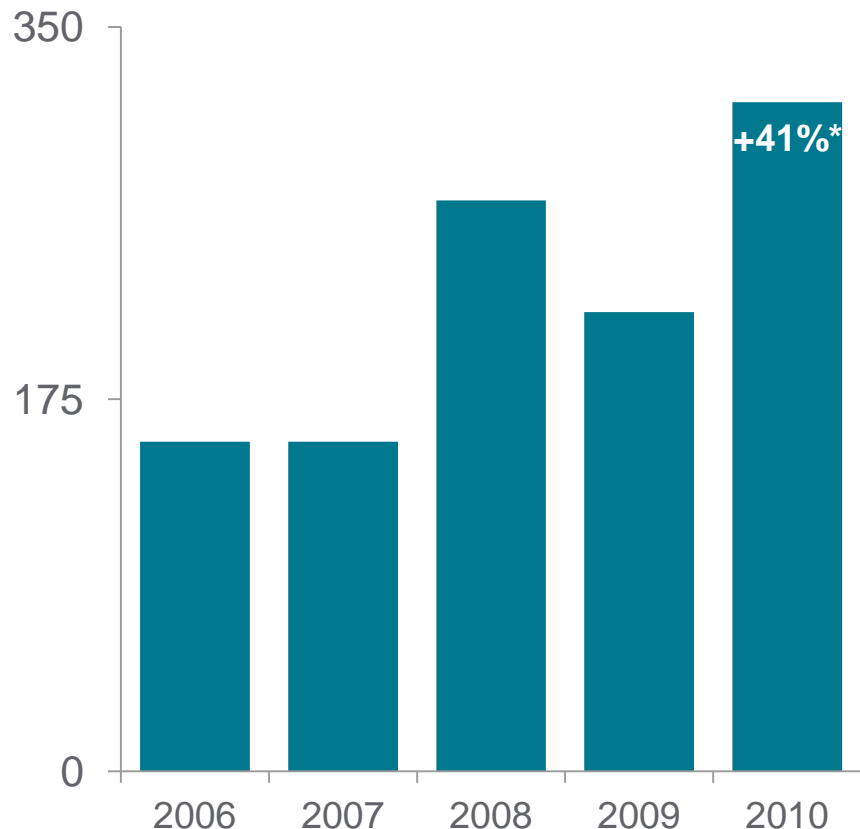
- Return to 2008 record sales level
- Argentina, Brazil recovery
-  **Priori Xtra**[®] : substantial sales increase, leading offer on soybeans

* At constant exchange rates

Amistar® : excellent disease control, crop enhancement

Q1 sales

\$m



- Immediate demand for new capacity
- Yield and quality benefits, ease of harvest
- ~120 crops in ~100 countries
- 80% of sales in mixtures by 2012



Amistar range contains azoxystrobin

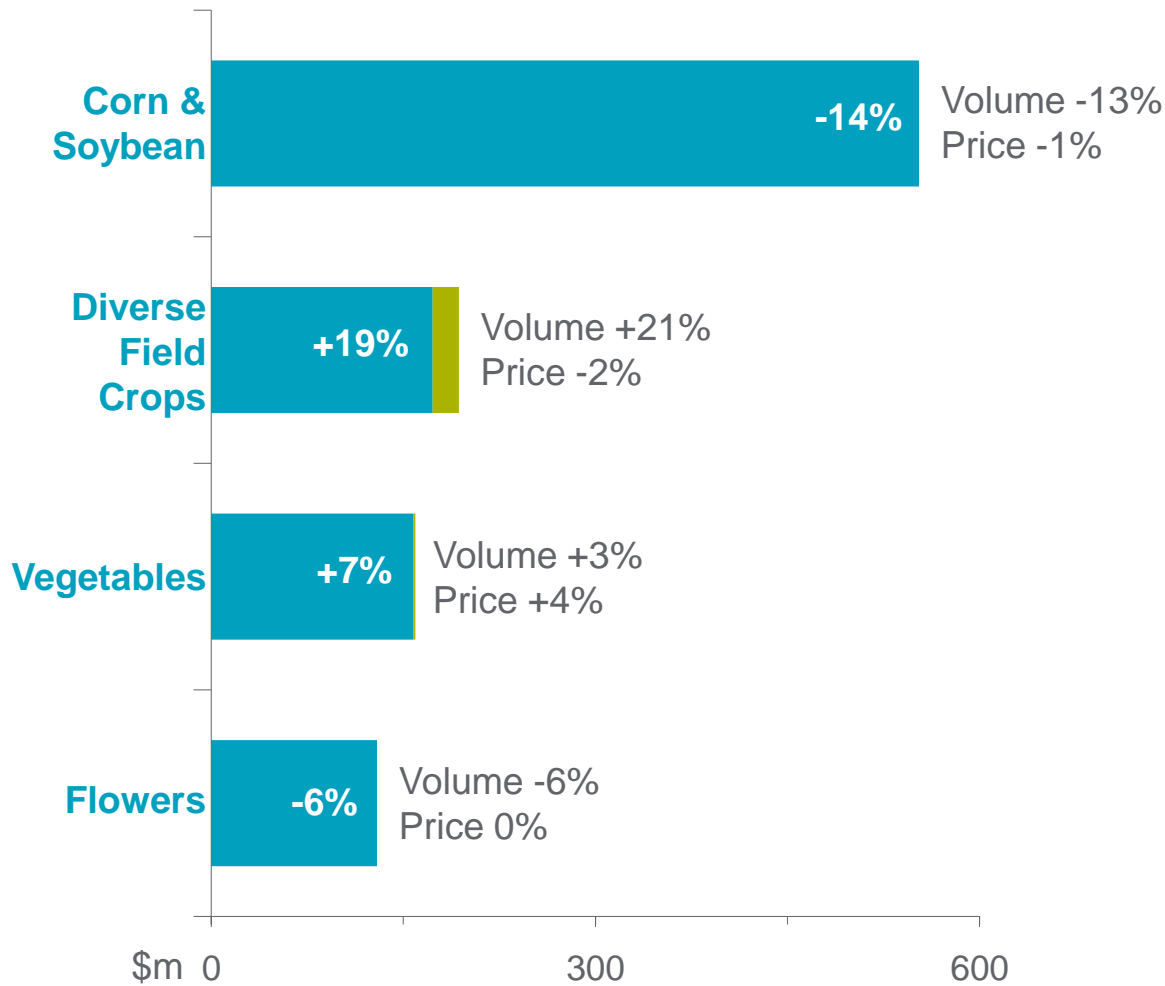
* At constant exchange rates

Seeds highlights

- Sales down 6%* at \$1.0 bn
 - up 7%* adjusting for advanced NAFTA Q4 '09 corn & soybean sales
- Corn & Soybean: US triple stack penetration
- Vegetables, Diverse Field Crops: continuing growth
- Flowers: delayed start

* At constant exchange rates

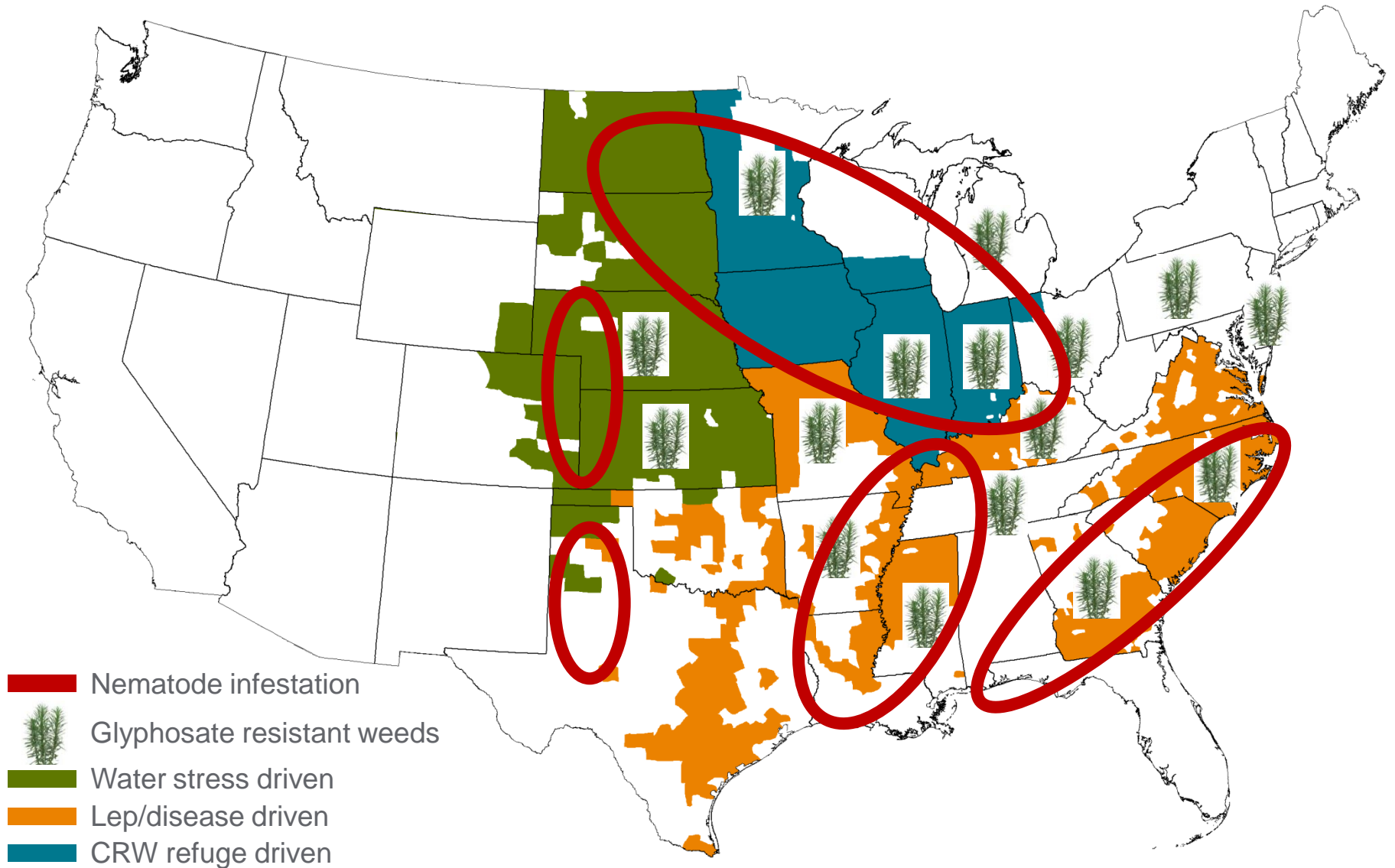
Seeds sales by product line



- Sales +6%* adjusting for advanced NAFTA Q4 '09 sales; E Europe, LATAM growth
- Sunflower acquisition, Eastern Europe growth
- Growth 9% excluding divestments; double digit in emerging markets
- Delayed start to selling season

Growth at constant exchange rates ■ Acquisitions

US corn: differentiated approach



Outlook

- Volume growth from Q2
- Crop Protection: channel inventory reduction expected
- Seeds: EBITDA margin expansion
- Currency, raw material benefit: +~\$200m
- Depreciation expense ~\$275m, NFE ~\$170m, tax rate >20%
- Operating income growth > EPS, strong free cash flow

Global reach and diversity

- Q1 2010: market dynamics affected by difficult 2009
 - higher grain inventories, lower commodity prices
- Emerging markets expansion
- Syngenta: continuing investment in growth, innovation
- Seeds transformation
- Broad crop and product reach, integrating technologies
- Targeting market outperformance

Bringing plant potential to life