



First quarter 2011 sales

April 15, 2011

Safe harbor

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First quarter 2011 highlights

- Good start to Northern hemisphere season
- Continued strong emerging market growth
- Sales up 13%*: volume +14%, price -1%
- Growth in all product lines, all regions

* At constant exchange rates

Integrated business update

North America: +6%

- USA: robust volume growth
- Challenging price comparison
- Canada: high cereal herbicide inventories

Europe, Africa & Middle East: +20%

- Strong start: commodity prices, favorable weather; France, Germany lead growth
- Acreage expansion
- Eastern Europe rebound

Latin America: +16%

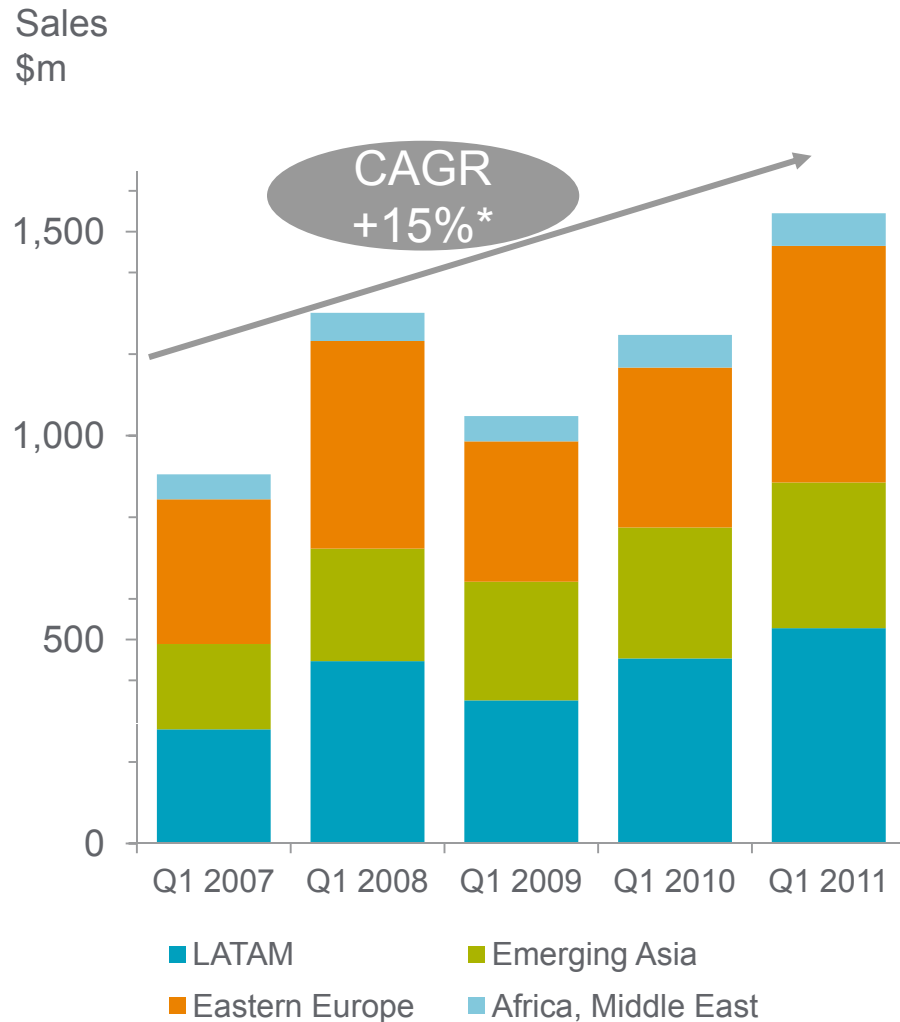
- Strong insecticide sales: ACTARA[®], DURIVO[®]
- Corn in Brazil, Mexico

Asia Pacific: +6%

- Increasing seed care adoption
- AMISTAR[®] expansion
- Emerging market growth; Japan lower

Crop Protection + Seeds at constant exchange rates

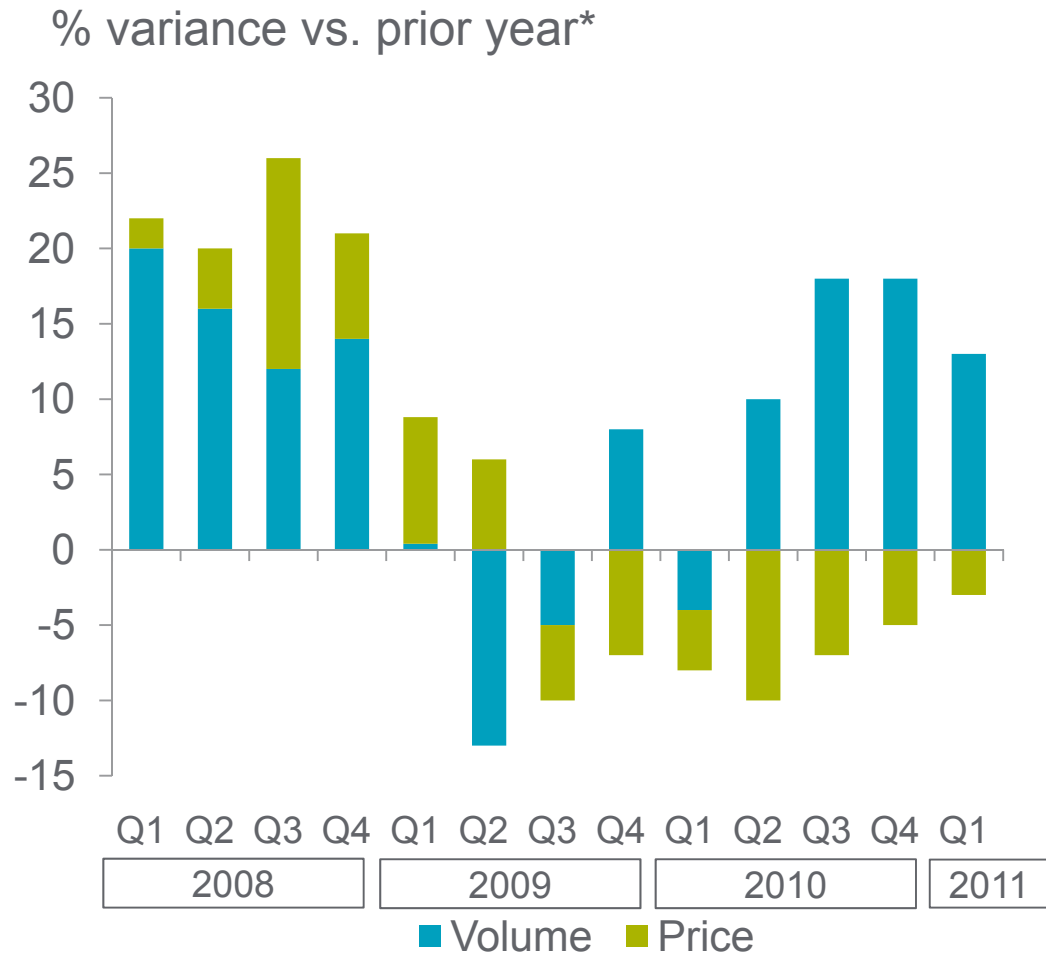
Track record in emerging markets



- ~50% of group sales
- Market leader in all regions
- Early and ongoing investment
- Leveraging strong presence in key crops
 - soybean in Latin America
 - sunflower in Eastern Europe

* At constant exchange rates

Crop Protection: quarterly performance



- Positive volume momentum: Q1 2011 +13 percent
- Improving price trend
- Q1 price -3 percent: North America comparative
- Price increases implemented: on track for price stability

* At constant exchange rates

Crop Protection: Q1 sales by product line

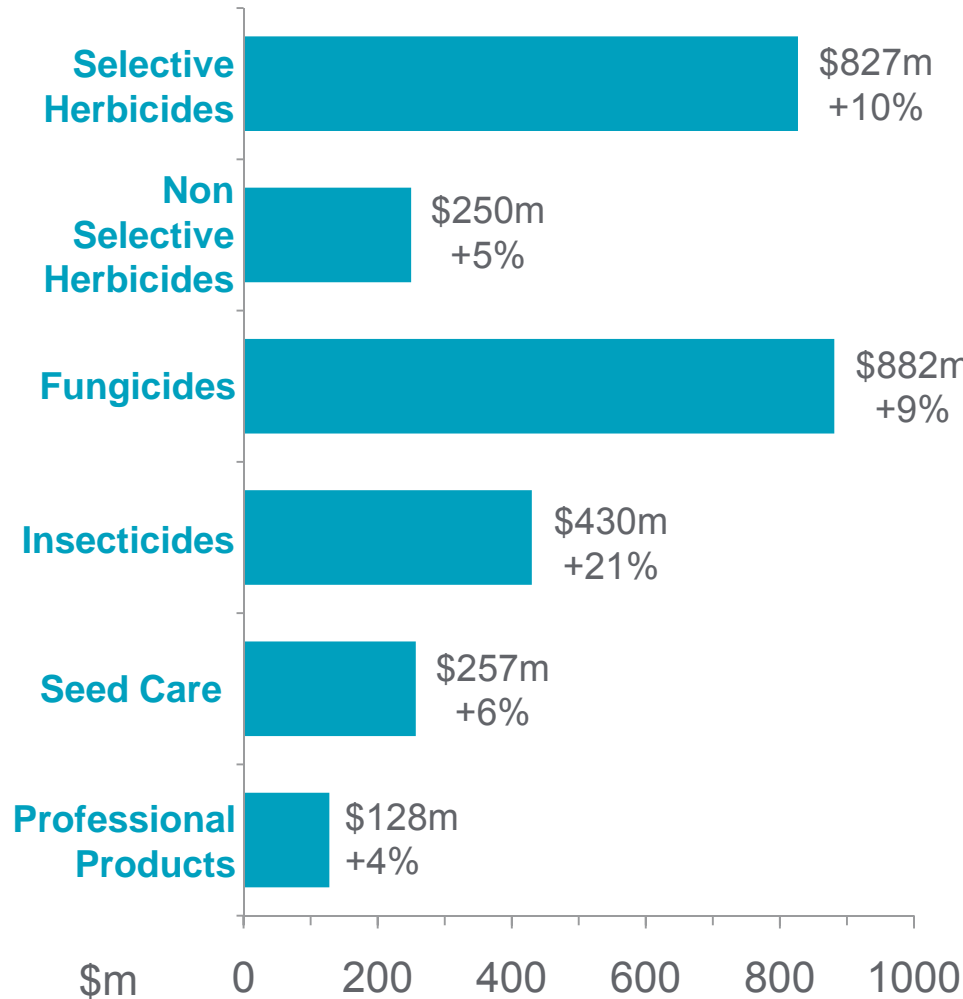


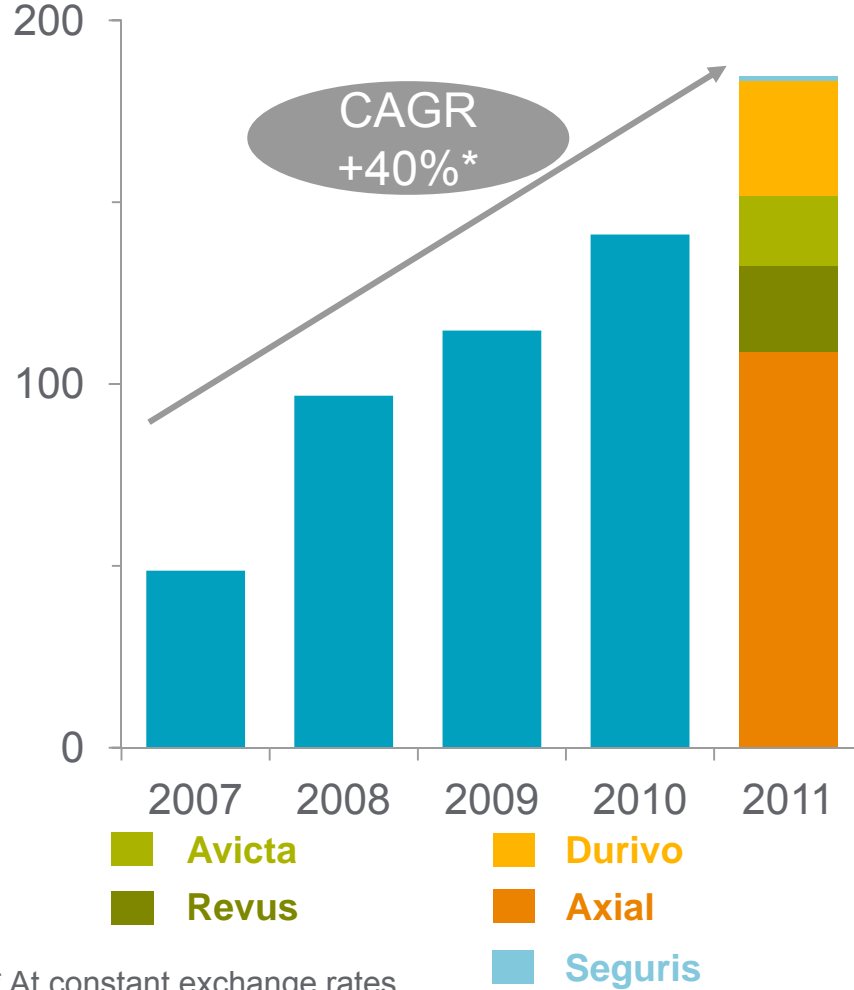
Chart excludes 'Other': \$17m (-6%)
 Growth at constant exchange rates

- Cereals in Europe, resistance management in USA
- Growth in the Americas; glyphosate price stabilized
- Growth in all regions; early Northern hemisphere sales
- Sales up by >50% in the Americas: FORCE[®], DURIVO[®], ACTARA[®]
- CRUISER[®] growth in Europe, ongoing adoption in Asia Pacific
- Improved Consumer performance in Europe

New products sales up 31 percent*

Q1 sales

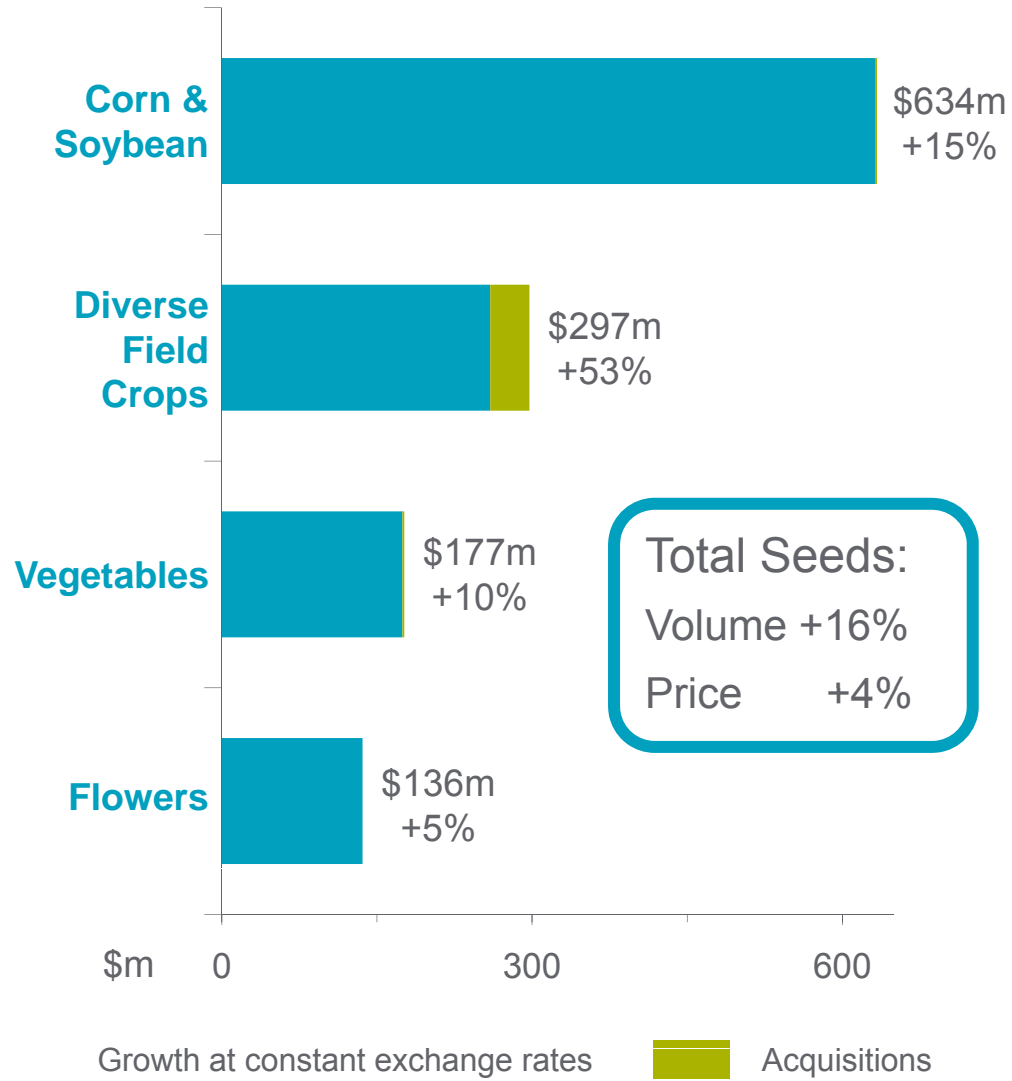
\$m



* At constant exchange rates


- **AXIAL**: cereals launch in France, Spain and China
- **REVUS**: >50 countries
- **Avicta**[®]: volume growth in US cotton market
- **Durivo**[®]: continued success on rice, vegetables in Asia
- **Seguris**[®]: expansion to LATAM

Seeds: Q1 sales by product line



- Enhanced US portfolio; Latam, Eastern Europe expansion
- Sunflower in Eastern Europe
- Continued expansion in all crops
- Recovery in Europe, modest growth in North America

Corn & soybean: continued technology advance

- US portfolio progression:  
 - 60 percent triple + 20 percent multi-stack
- Viptera™: leveraging technology across borders
 - First triple stack approval in Brazil
- : dual mode of action + broad lep
 - corn belt 5% block refuge approval; awaiting RIB approval
-  **Enogen**™ corn amylase trait: first output trait for ethanol
 - USDA approval, ~20,000 acres planted
- Soybean: development of HPPD herbicide tolerance trait
 - new tool to combat weed resistance

Diverse Field Crops: significant growth



- Sales up by > 50 percent
- Global leadership in sunflower
- Successful integration of acquisitions
- Market expansion in Eastern Europe

Financial update

- Currency: Swiss franc appreciation
 - Full year EBITDA impact -\$75m
- Raw materials: broadly neutral
 - Long term supply contracts, inventory lag
- Trade working capital: continuing reduction as % of sales
- Share repurchase: \$200m planned
 - 102,500 shares to date, value \$32m
- Dividend: CHF 7.00 per share proposed
 - AGM on 19 April: expected payout ~\$650m

Integration update

John Atkin



Regions: Europe, Africa,
Middle East

Latin America

Crops: Cereals
Soybean
Sugar cane
Specialty

Products: Crop Protection

Davor Pisk



Regions: North America
Asia Pacific

Crops: Corn
Diverse Field Crops
Rice
Vegetables

Products: Seeds

- Global Crop Heads appointed: teams in place
- Territory leadership appointed
- Sales force combination underway
- On track for full integration by 2012

Outlook

- Continued positive volume momentum
- Broad-based growth across regions
- Stabilization of Crop Protection pricing
- Financial objectives:
 - EBITDA margin: 22-24% by 2015
 - CFROI above 12%
 - Increased dividend return

Bringing plant potential to life