



First quarter 2014 sales

Basel: April 16, 2014

Safe harbor

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First quarter 2014 highlights

Group sales:

\$4.7bn ↑2%

Integrated sales:

\$4.5bn ↑5% at CER

Volume +2% | Price +3%



- Strong start to European season
- North America plantings delayed by weather
- Ongoing emerging market growth: +11%
- ELATUS™ approval in Brazil

First quarter 2014 integrated sales: up 5 percent

North America: -7%

- Prolonged cold temperatures leading to delayed US season
- Extreme drought in California
- Seedcare driving growth in Canada

Europe, Africa & Middle East: +10%

- Mild winter and spring leading to early season
- Strong growth in Iberia and Italy
- Dynamic growth in CIS; currency movements partly offset by price

Latin America: +9%

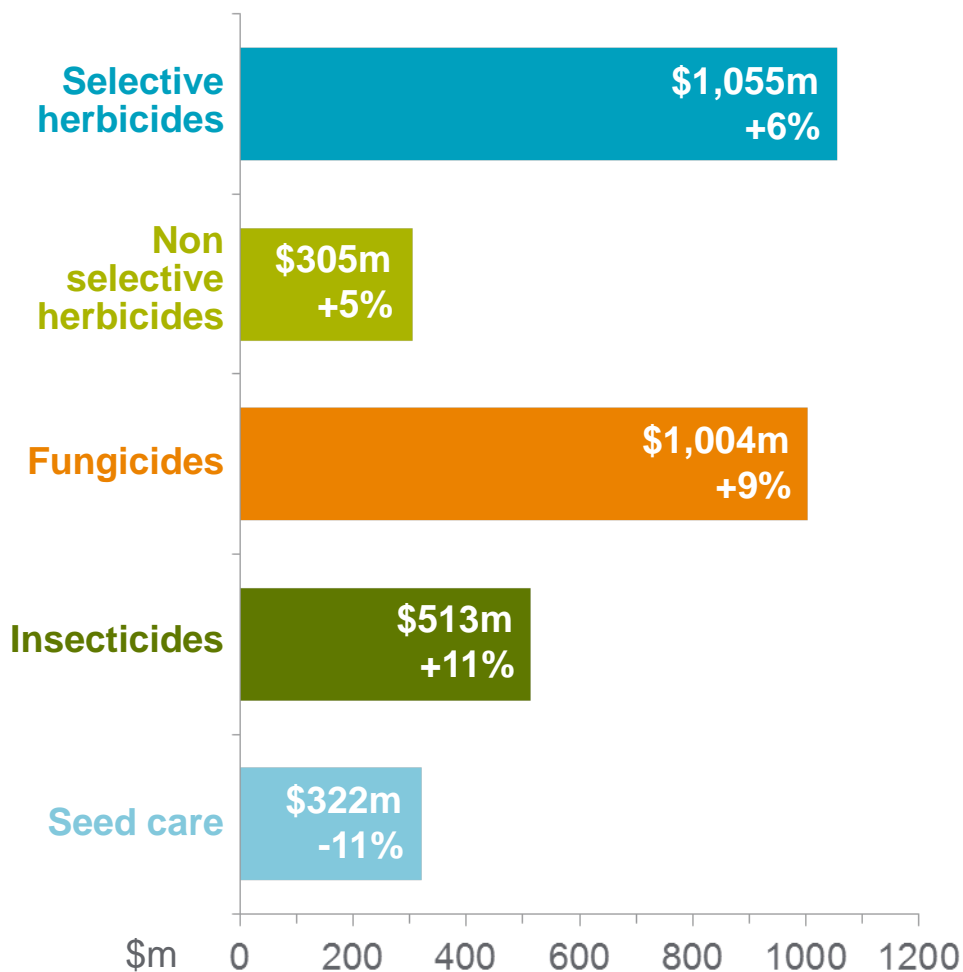
- Good growth despite dry conditions in Brazil and LAS
- Lower 2nd season corn acreage
- Venezuela business resumed

Asia Pacific: +14%

- Broad based sales momentum
- Strong herbicide growth
- AMISTAR® technology expansion in China, South Asia

Growth at constant exchange rates

Crop Protection: Q1 sales up 6 percent

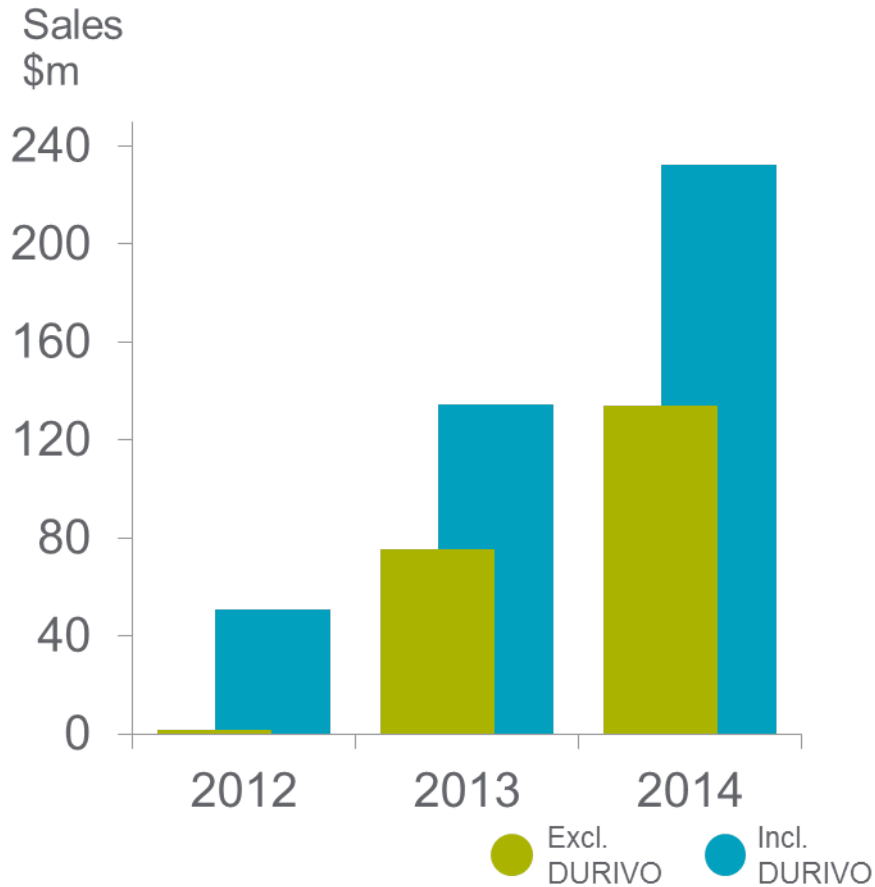


- Early season in Europe, strong performance in cereals and corn
- GRAMOXONE® growth more than offset lower TOUCHDOWN® sales
- Early demand across Europe; double-digit growth in Latin America
- DURIVO® expansion in Latin America; drought impacting sales in North America
- EU suspension of neonicotinoids; lower corn sales in Latin America

Chart excludes 'Other': \$45m (+70%)
Growth at constant exchange rates

Crop Protection portfolio: new product highlights

Q1 2014 sales up 85%



% at constant exchange rates



Clariva™

Successful launch on soybeans in USA



Fortenza®

Successful launch in Argentina



Vibrance®

Ongoing rapid transition in North America



Seguris®

Strong demand in Central Europe

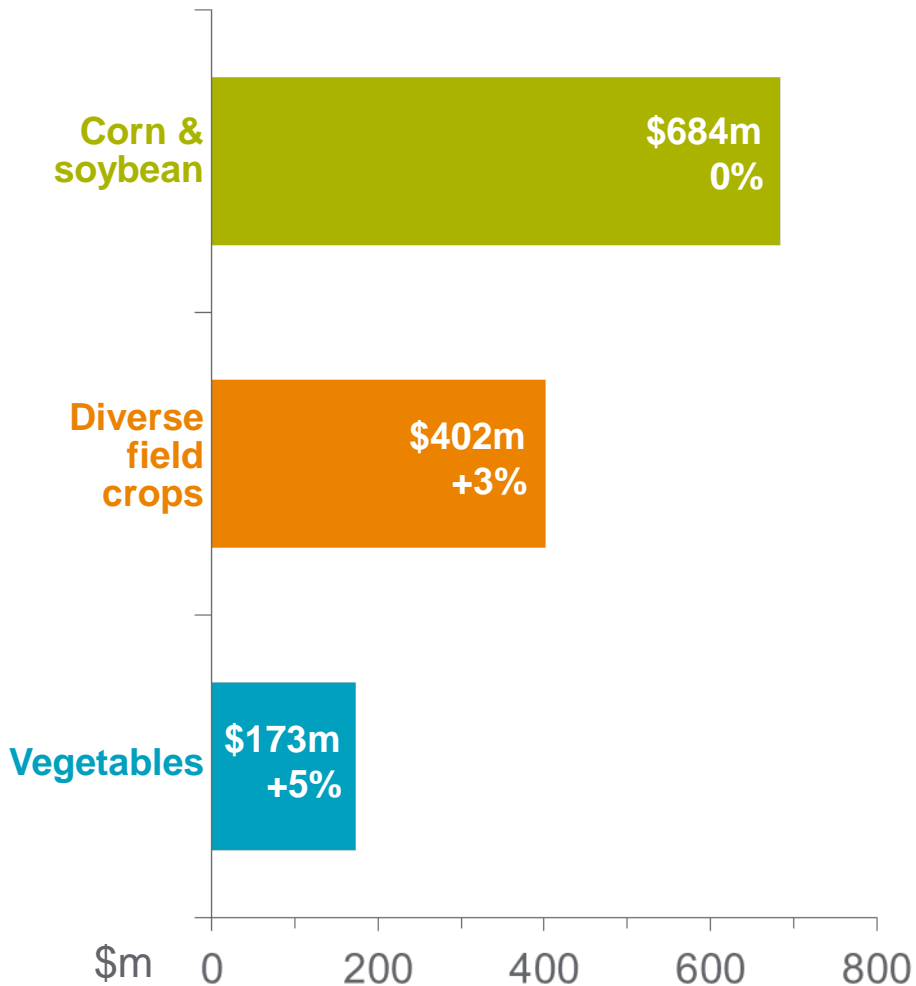


Elatus™

Growth in Paraguay and Bolivia

SDHI chemistry gathering momentum

Seeds: Q1 sales up 2 percent

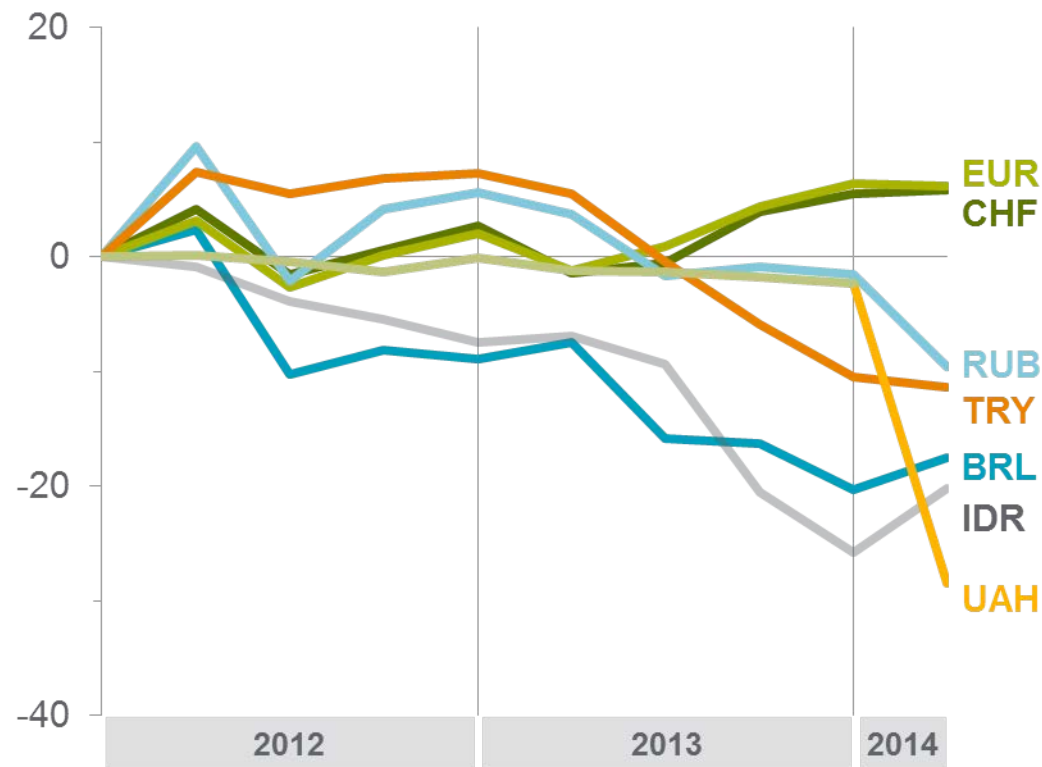


Growth at constant exchange rates

- North America sales unchanged despite delayed season
- Lower corn acreage in Latin America
- Growth in Europe and Asia Pacific
- Ongoing sunflower technification in CIS; lower sales in Europe ex. CIS
- Underlying growth ex. DULCINEA® divestment 9%
- Developed market recovery continuing
- Strong emerging market growth

Emerging market currency weakness

End quarter % change vs. dollar indexed to December 31, 2011

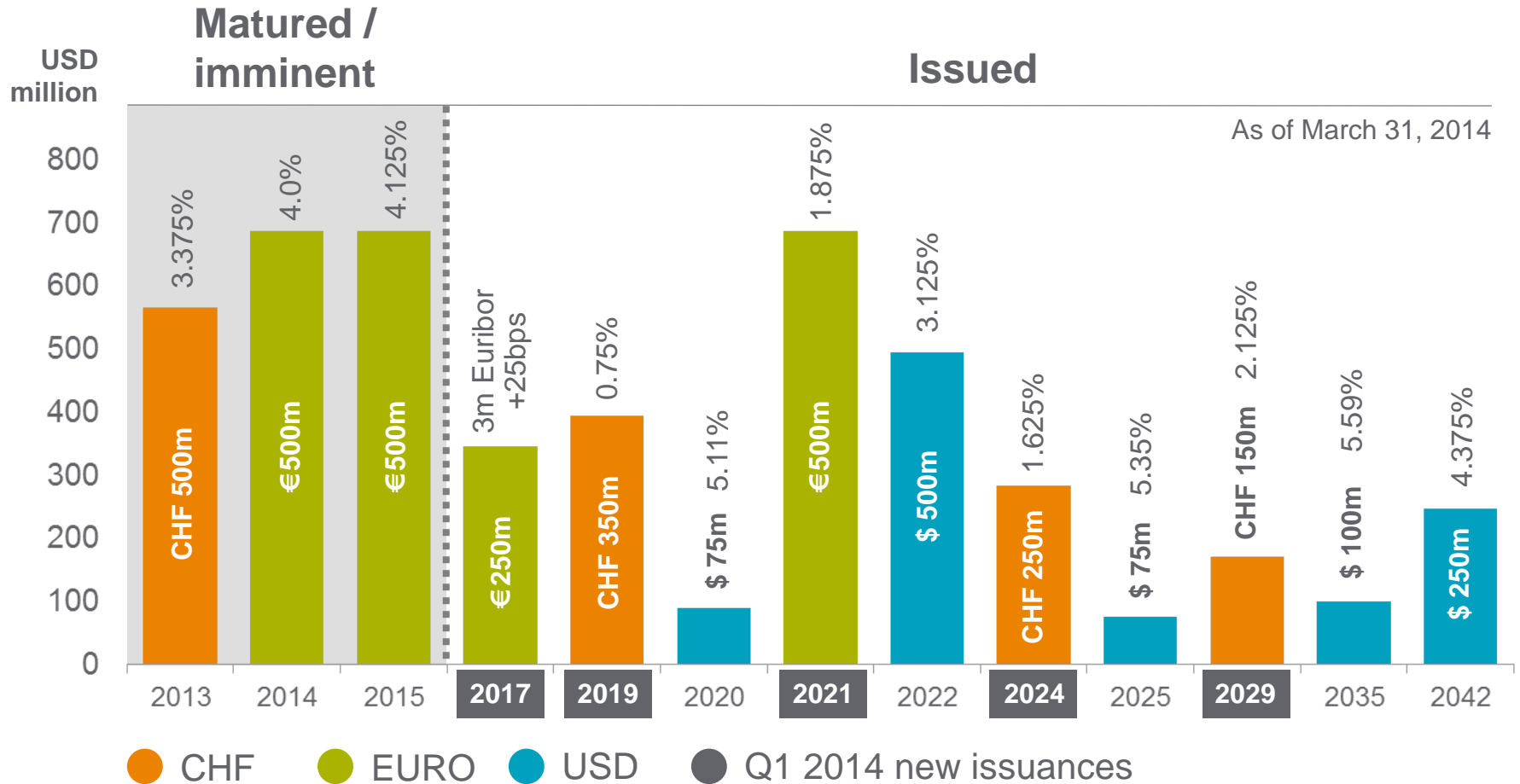


- Russia Ruble
- Turkey Lira
- Brazil Real
- Indonesia Rupiah
- Ukraine Hryvnia

- Depreciation of emerging market currencies, particularly CIS
- Ukraine, Brazil: systematic recovery of currency loss through price increases
- Full year currency impact ~\$100m, net
- Emerging market demand robust
- Active risk management in place

2014 bond issues: demonstrate balance sheet strength and credit quality

- Significantly enhanced debt maturity profile
- New bond issues at attractive rates



Expanding presence in durum wheat

Acquisition of PSB complements cereals portfolio



- 30% of Italian durum wheat seed market: prime varieties grown on 330,000 hectares
- Leading breeding and production expertise
- High quality wheat for pasta production in Italy
- Supporting international expansion

Syngenta protocols driving yield and protein content

Standard growers

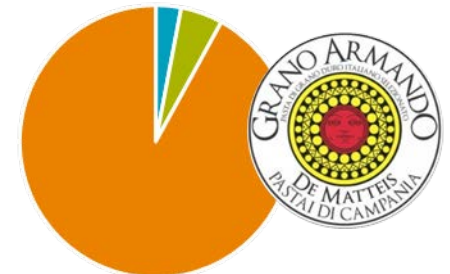


Average yield 3.3 tons/ha

Protein target >14.5%

- Fully reached
- 13.5 – 14.5%
- Failed

>540 participating growers



Average yield 3.9 tons/ha

US Corn: increasing ethanol plant productivity



Collaboration to make ethanol from corn kernel fiber

The Quad County Corn Processors (QCCP) ethanol plant in Galva, Iowa



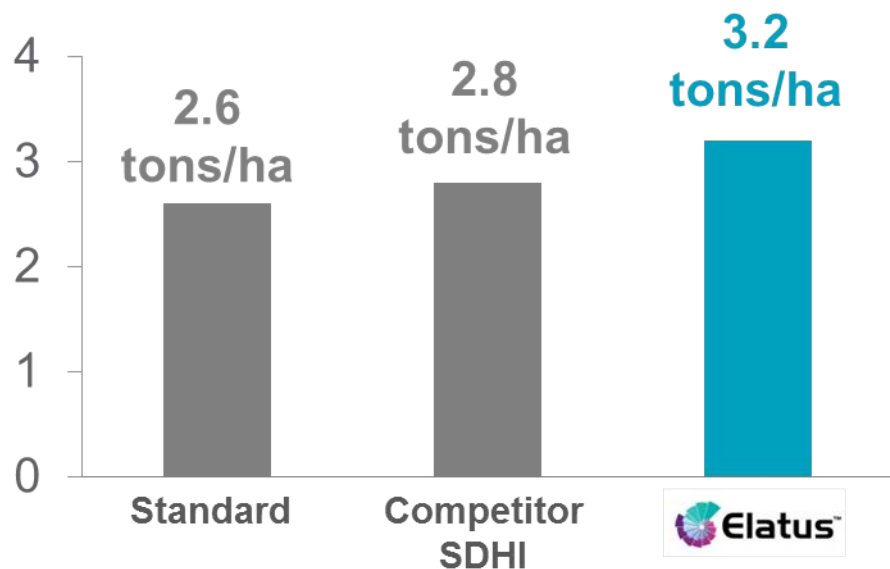
 **Enogen®** + **ACE**

- Licensing Adding Cellulosic Ethanol (ACE) technology: new process for ethanol plants
- ENOGEN®: only corn output trait producing ethanol from corn starch
- Combined offer delivers greater cost benefit:
 - 17% increase in ethanol production per plant expected
 - 200% corn oil yield increase
 - Higher protein content in DDGs

Substantial increase in sustainability and profitability of ethanol plants

Securing reliably higher yields for soybean growers

Soybean yield
tons/ha



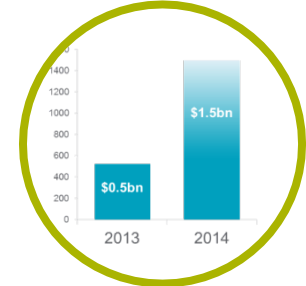
Soybean rust:
\$20bn in crop losses
since 2001



- Intervals between applications are 7-10 days longer
- Greater flexibility and improved efficiency for the grower
- Potential on other crops in the EU and North America

Full year outlook

Integrated sales:
6% at CER



- Gross margin improvement: lower seeds costs
- R&D expense at upper end of 9-10% of sales target
- Currency impact on EBITDA ~\$100m
- Free cash flow before acquisitions \$1.5bn

Bringing plant potential to life