First quarter 2015 sales

April 17, 2015

Safe harbor

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First quarter 2015 highlights

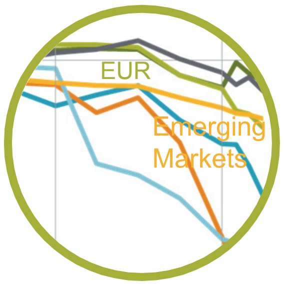
Group sales:

$4.0bn ↓14%

Integrated sales:

$3.8bn ↑1% at CER

Volume -7% | Price +8%



- Significant currency headwinds: emerging markets, Euro
- Pricing largely offsets currency in CIS
- Good start in Europe
- Delayed North American season
- Latin America and Asia-Pacific lower following strong 2014

First quarter 2015 integrated sales: up 1 percent

North America: -16%

- Sales -13% ex glyphosate
- Industry oversupply in Canadian seedcare
- Lower corn acres expected

Europe, Africa & Middle East: +15%

- Successful management of volatile CIS markets
- Broad based fungicide growth
- Good performance in Central and Northern EU

Latin America: -11%

- Venezuela sales delay
- Low insect pressure
- Lower second season corn acreage in Brazil

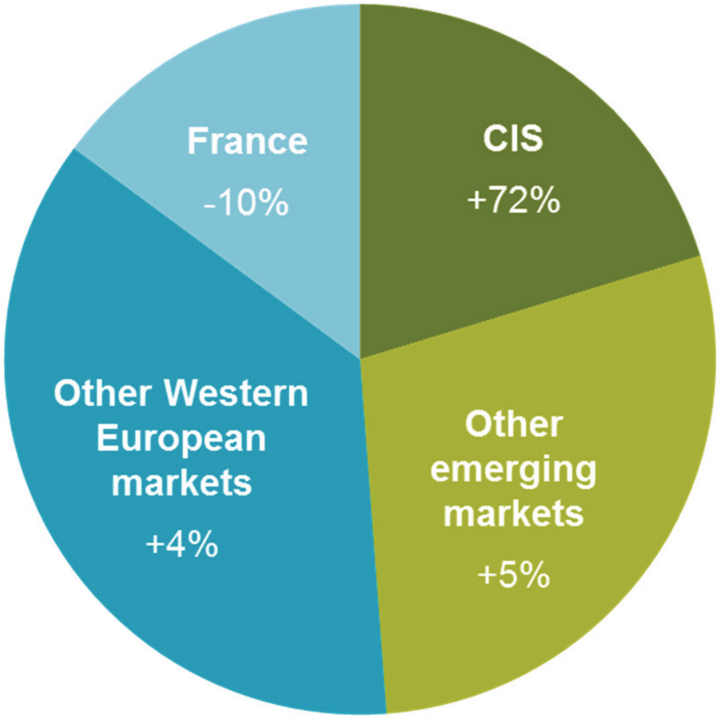
Asia-Pacific: -6%

- China: paraquat regulatory change
- Japan phasing due to consumption tax
- Lower rice acreage in Thailand partly offset by GroMore™ in South Asia
- Broad based price increases

Growth at constant exchange rates

Resilient performance in Europe, Africa and Middle East

Q1 integrated sales: $1.8bn



- CIS currency depreciation: price offset
  - 2014 collections: UA 100%, RU 96%
- Europe ex CIS up 2% CER versus strong Q1 2014
- Other emerging markets:
  - good crop protection performance
  - lower spring crop planting in South East Europe
- France: early orders in Q4 2014
- Other Western European markets: good early season performance led by crop protection

Growth at constant exchange rates

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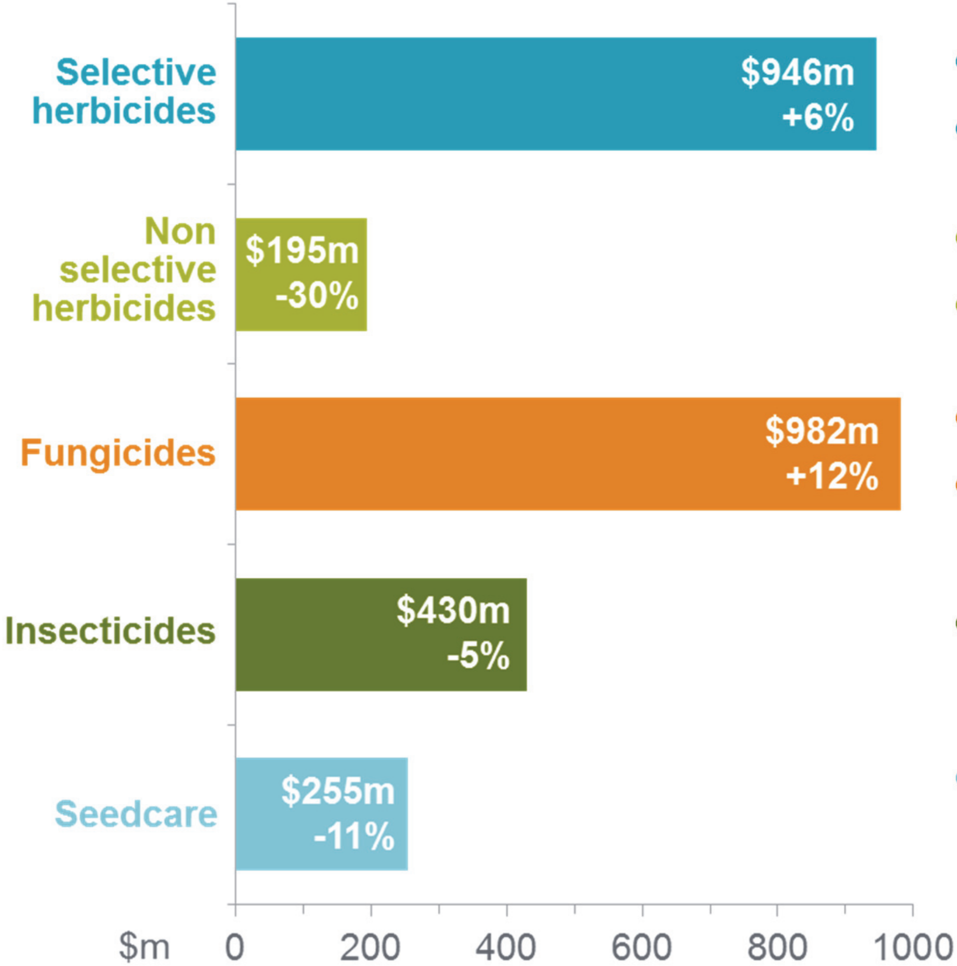
Crop Protection: first quarter sales up 1 percent



- CIS: good volume growth, price increases
- Lower sales in France and North America

- Deliberate reduction in TOUCHDOWN®
- Paraquat: regulatory change in China

- Europe: double digit volume growth
- Latin America: continued ELATUS™ adoption

- Limited pest pressure in Brazil and Argentina

- High channel inventory in Canadian cereals market

Chart excludes ‘Other’: $33m (-22%)
Growth at constant exchange rates

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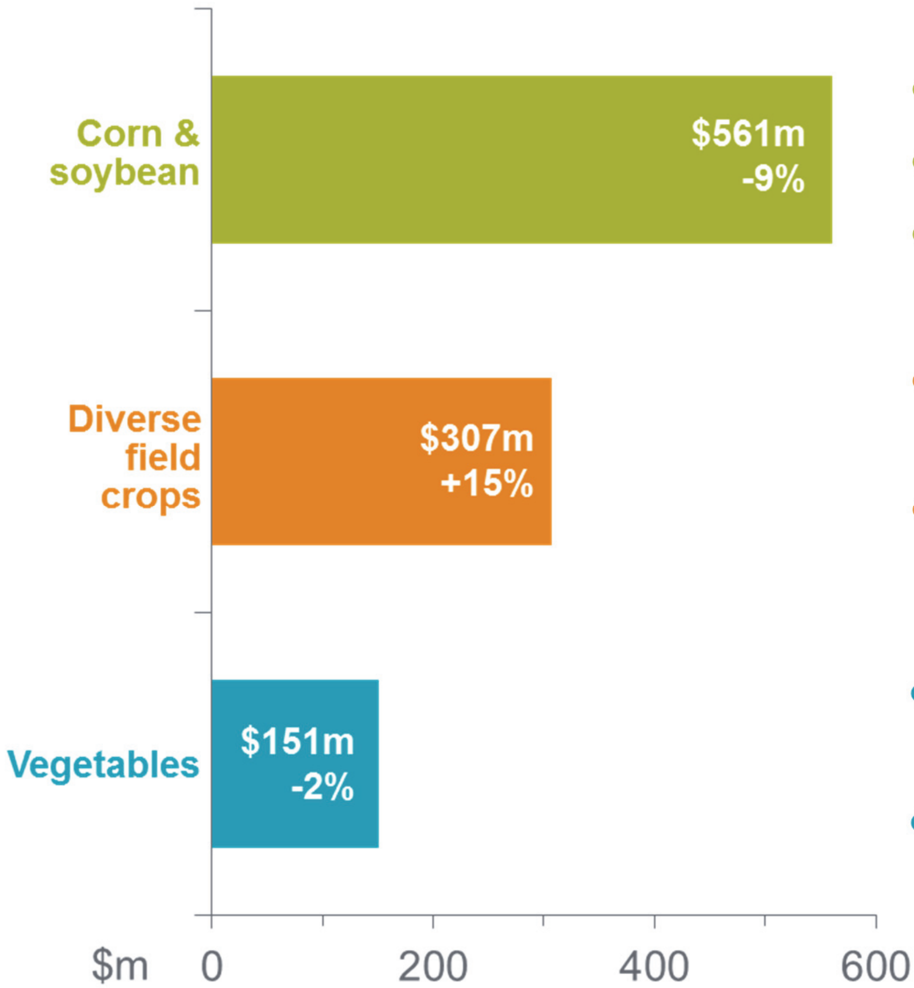
Seeds: first quarter sales unchanged



- Distribution changes in USA
- Royalty income lower
- AGRISURE VIPTERA® >30% portfolio

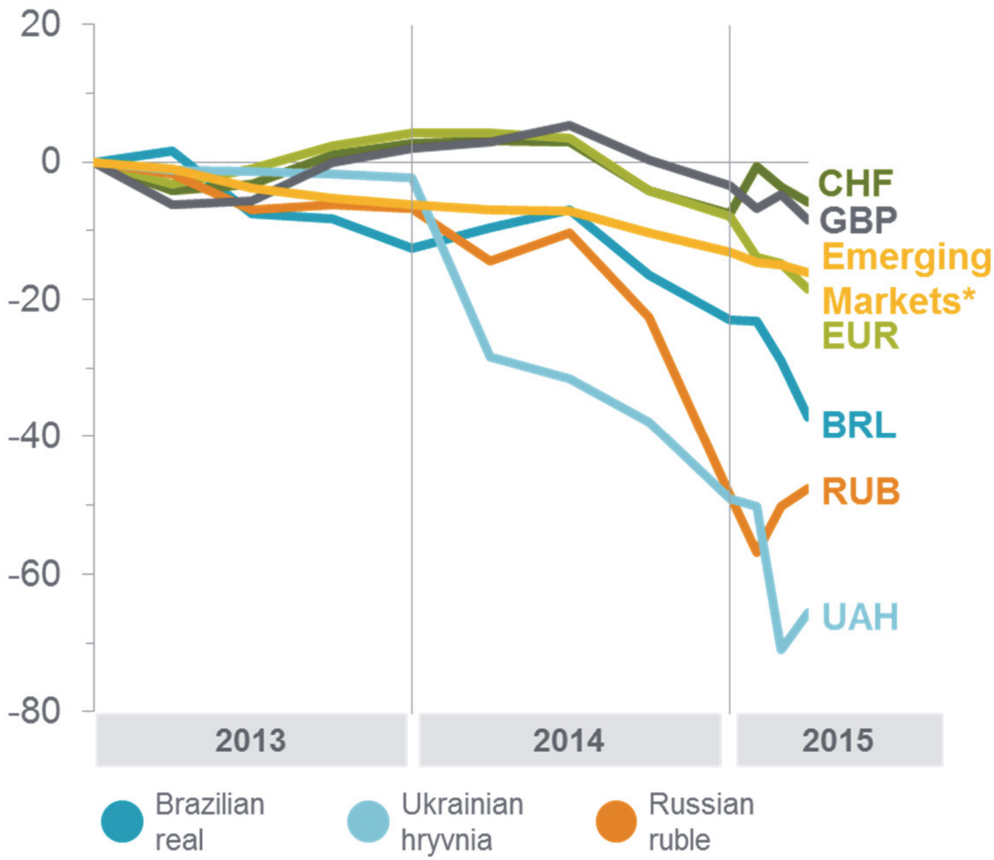
- CIS price increases; growers opting for local genetics
- South East Europe: cold wet conditions delay planting

- Lower sales of sweet corn in Brazil and China
- Developed markets showing good momentum

Growth at constant exchange rates

Currency movements: first quarter volatility

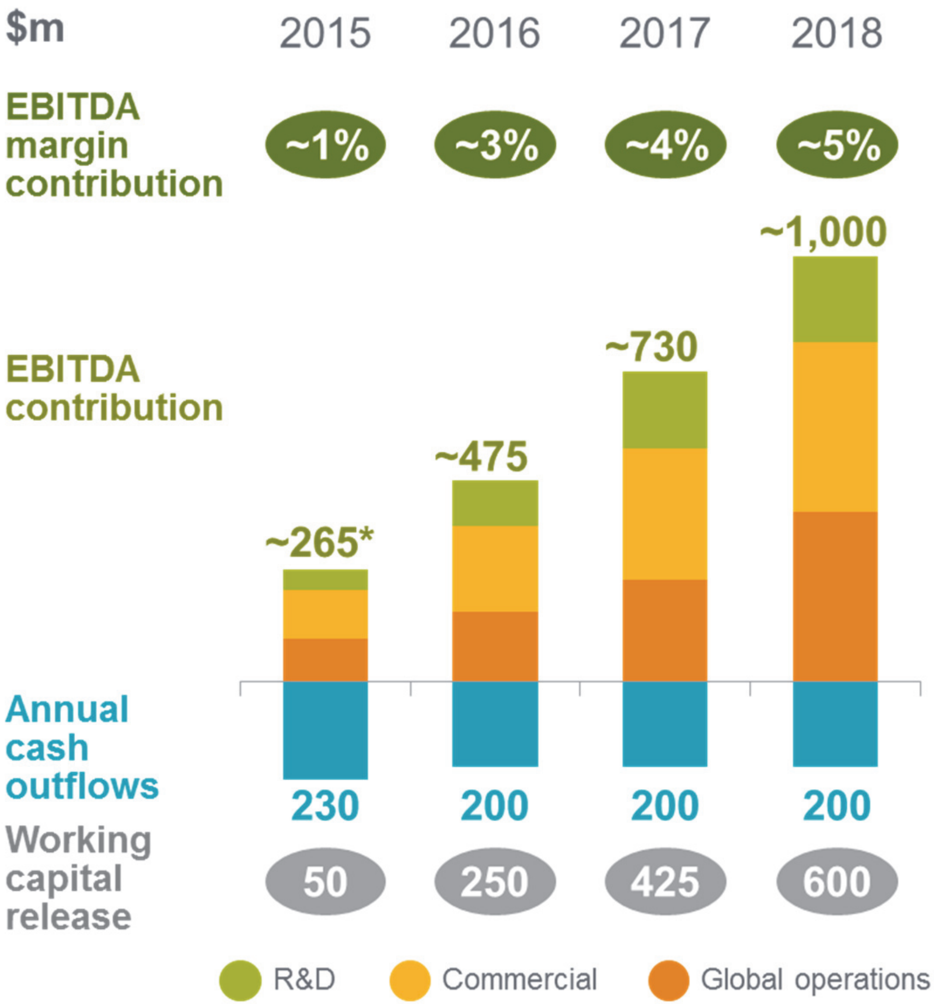
End quarter % change vs. dollar
(2015 end month % change vs. dollar)
Indexed to December 31, 2012



- Significant further currency volatility: Euro, CIS, BRL
- Price increases offset 75% of emerging market currency depreciation in Q1
- Euro, CHF EBITDA protection through hedging
- Continuing US dollar strength: estimated FY currency headwind ~$130m ex CIS
  - higher net financial expense

* Sales-weighted basket of emerging market currencies excl. BRL, UAH, RUB

Accelerating Operational Leverage program



- Good progress since 2014 launch
  - savings on track for $265m* in 2015
- 2015 total restructuring and impairment**:
  - pre-tax charge: ~$300m
  - cash outflow: ~270m

* Includes existing program savings: $75 million in 2015
** Includes AOL, prior programs and integration related expenditures

Outlook

Focus on higher profitability and above market growth

2015:

- Sales unchanged at CER
- EBITDA around 2014 level
- Tax rate higher
- Substantial free cash flow

Long term:

- 24-26% EBITDA margin target for 2018 maintained
- Integrated strategy driving above market growth:
  - emerging market presence
  - new products

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Strong portfolio of new products

	Cereals and DFC	Corn	Rice	Soybean	Vegetables and Specialty	Peak sales
Seguris®	●		▲		●	>$150m
Vibrance®	●	●	●	●	▲	~$500m ↑
Clariva™	●			●		>$200m
Elatus™ Solatenol™	▲	▲		●	▲	~$1,000m ↑
Fortenza™ Minecto™	●	●	▲	●	●	>$400m
Acuron™	▲	▲				>$250m
Orondis™ Oxathiapiprolin					▲	>$100m
New product	▲	▲		▲	▲	>$300m

● Already launched ▲ Launches to come

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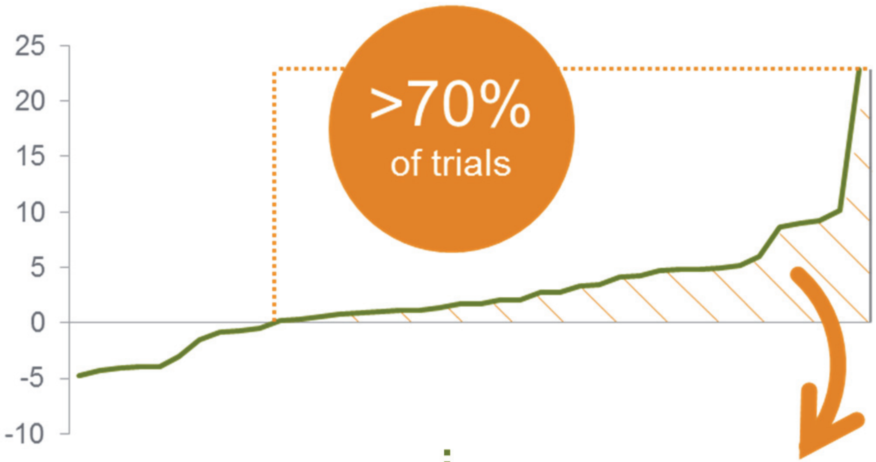
Solatenol™ on cereals: beats standard in over 70 percent of trials

Solatenol™ mixture benefit (dt/ha)



Untreated

Solatenol™ mixture

- Over 600 trials in 13/14 in EU
  - wheat and barley focus
- Outperforms current standard across all major diseases
- Registration expected
  - 2015: USA
  - 2016: Europe
- Reinforcing recent SDHI innovations: VIBRANCE®, SEGURIS®

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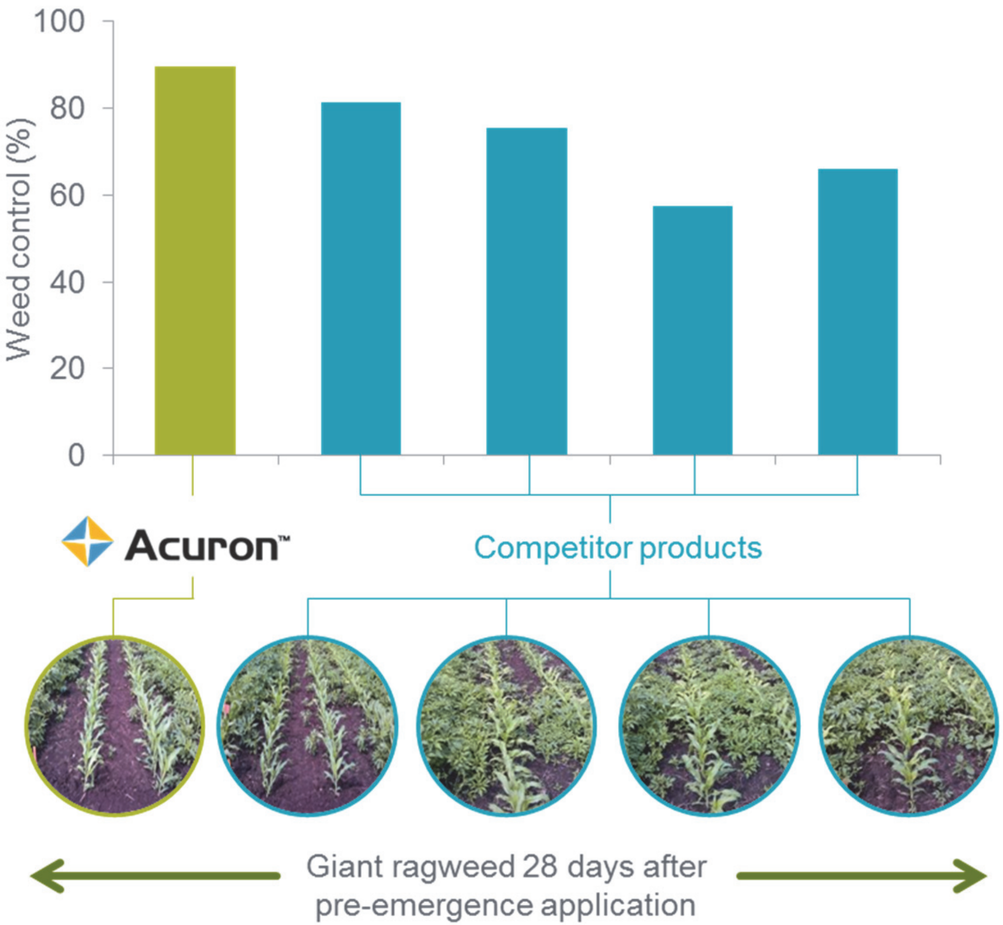
ACURON™: outperforming competitor solutions in corn



- >150 herbicide trials with universities across 35 US states
- Outperforms current leading herbicide solutions
- Provides 4 active ingredients and 3 different modes of actions to help growers manage weed resistance
- Complements Early Season Weed Management approach
- Registration expected
  - 2015: USA and Argentina

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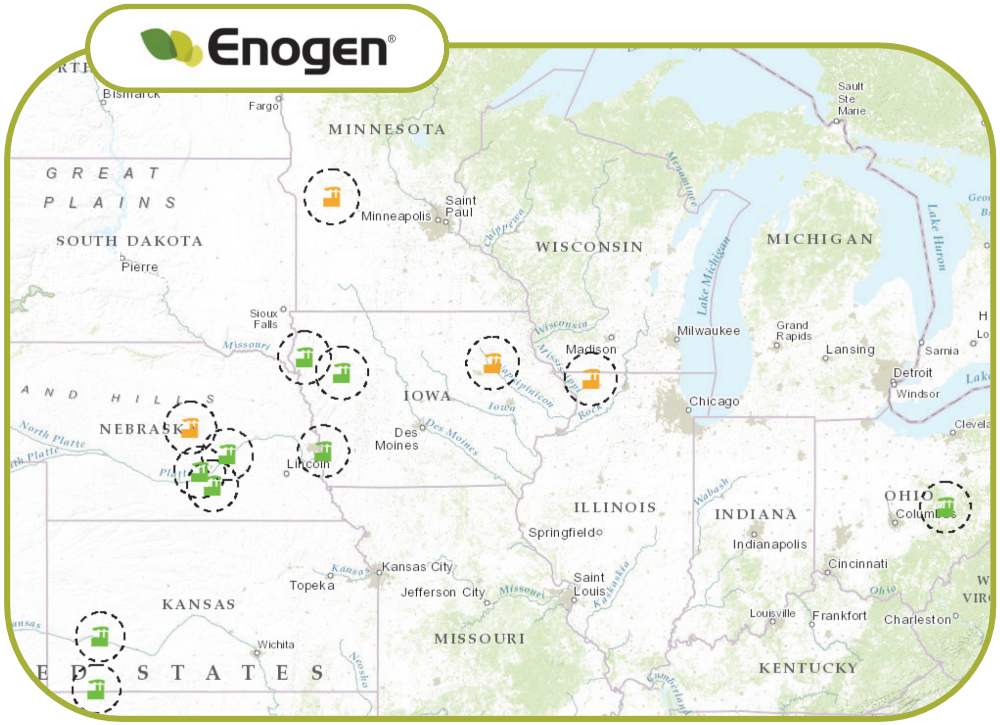
Corn: continuous expansion of the ENOGEN® platform



Commercial acre partners

Current trial partners

- Ethanol grain quality solution launched 2015
- ENOGEN®
  - 9 commercial partners with >700m gallons total capacity
  - 2015: doubling ENOGEN® acreage
- CELLERATE™ technology: first cellulosic output from corn kernel fiber hits 1m gallon milestone

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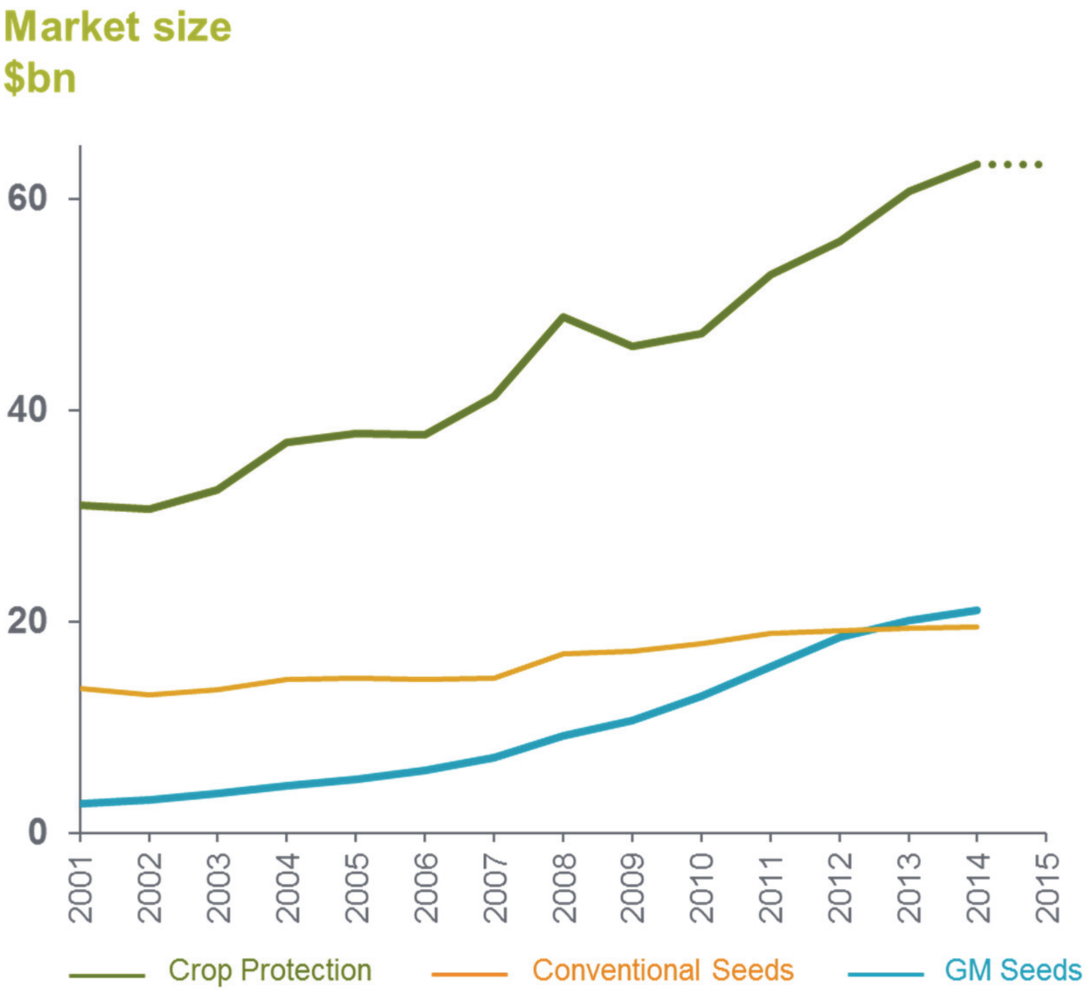
Long term market growth potential



- 2014 crop protection market: >$63 billion
- 2014 GM and conventional seeds: >$40 billion
- Pace of GM growth slowing
- Longer term crop protection outlook robust:
  - innovation, resistance management
  - adoption, intensification

Bringing plant potential to life