

# Get to know Syngenta Group



**One of the global challenges is to feed a growing population**  
with the same amount of land and resources available

LAST 70 YEARS

**Agriculture has fed  
a further 5bn people  
on almost the same  
amount of land**

NEXT 30 YEARS

**+2bn**  
people

**+50%**  
more food needed



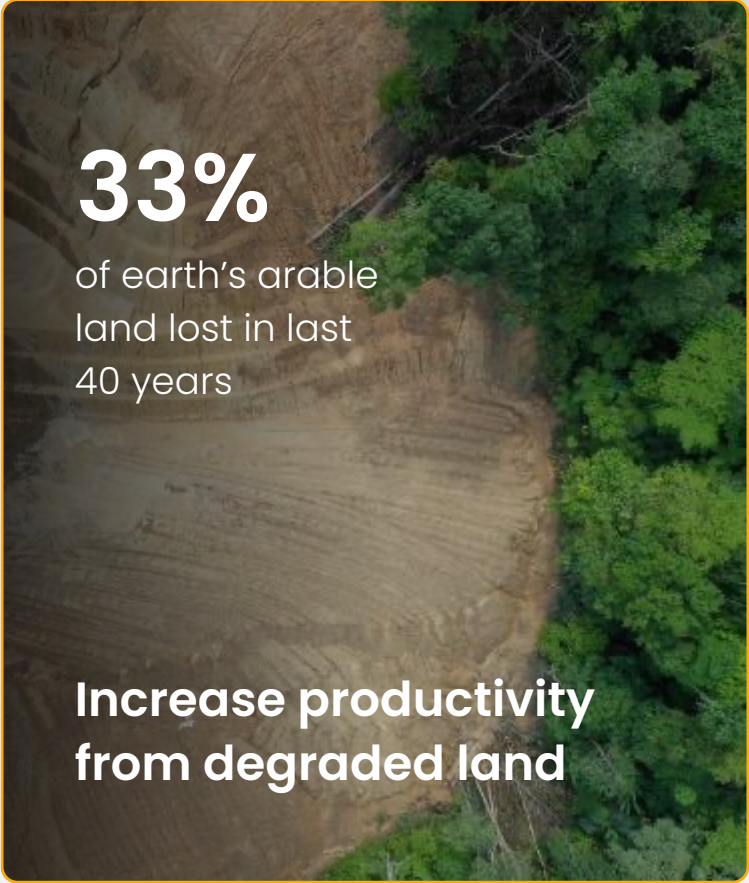
# Agriculture needs to change current practices with sustainable innovation

An aerial view of a large-scale irrigation system with multiple nozzles spraying water over a lush green agricultural field.

**70%**

of global fresh  
water used  
in agriculture


**Improve water  
use efficiency**

An aerial view showing a stark contrast between a cleared, brown, degraded piece of land and the surrounding dense green forest.

**33%**

of earth's arable  
land lost in last  
40 years

**Increase productivity  
from degraded land**

An aerial view of a red tractor with a tillage implement working in a field, turning over dark brown soil.

**23%**

of greenhouse  
gas emissions  
caused by agriculture,  
forestry and other land use

**Increase carbon  
storage in soil**



# Farmers are at the core of navigating a complex world to grow the food we need and protect the resources we depend on



Cope with effects of **climate change** driven weather extremes such as **floods** and **droughts**



Cope with **pest pressure** and more **resistant diseases**



Are good stewards of the soil and **conserve arable land**, manage water and input usage



Meet rising demand for **more food** and **higher quality**



Increase profitability and ensure investments to **adopt new technology** and **train labor**



Satisfy consumers **changing diets** and meet new **regulatory standards**





**Syngenta Group creates long-term,  
sustainable value for farmers everywhere**



With our HQ in Basel, Switzerland, Syngenta Group is a leading sustainable agricultural innovation and technology company. We embrace the diversity of our teams and expertise in more than 100 countries to deliver the broadest range of products and services for the benefit of farmers, society and our planet.



**#1**

in Crop Protection

**#3**

in Seeds

**#1**

in crop nutrition  
and farmer  
services in China



# Our passion for innovation has driven and inspired us for more than 250 years



# 2020

**Syngenta Crop Protection and Syngenta Seeds**  
Part of Syngenta Group  
June 18, 2020

**ADAMA**  
Part of Syngenta Group  
June 18, 2020

**Syngenta Group China**  
Sinochem Agriculture (BU) + ChemChina agribusiness merger  
June 19, 2020

**Syngenta Group**  
A new industry leader created through the grouping of Syngenta, ADAMA, and the agricultural businesses of Sinochem and ChemChina





# Our four Business Units together deliver unparalleled capabilities to serve farmers worldwide



Syngenta Crop Protection is a world leader in protecting crops.



ADAMA is a global leader in off-patent crop protection.



Syngenta Seeds is one of the world's largest developers and producers of seed.

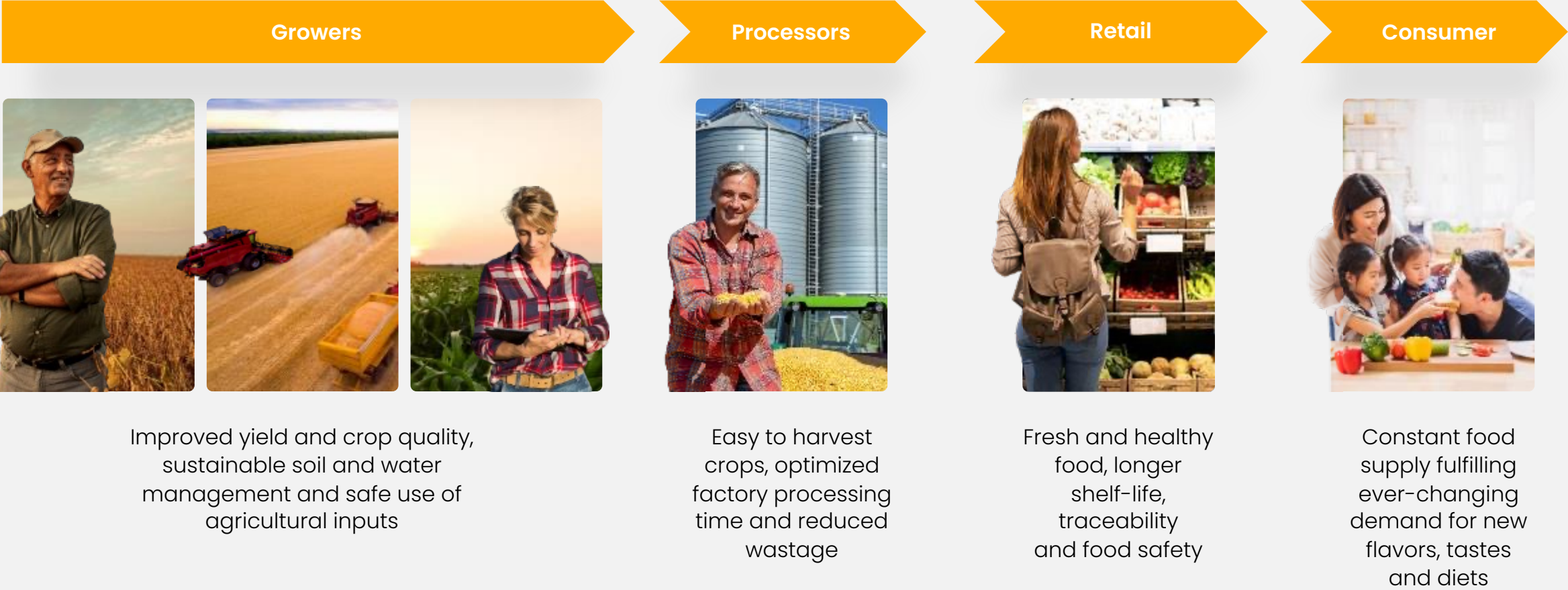


Syngenta Group China is China's leading agricultural technology and innovation partner, consisting of crop protection, seeds, crop nutrition, MAP and digital agriculture businesses.





# Our contribution positively and sustainably impacts the entire food value chain



# World's biggest food players

## committing to Regenerative Agriculture



Nestlé committed to **source 50%** of key ingredients through regenerative agricultural methods **by 2030**



PepsiCo committed to regenerative practices across **7 million acres by 2030**



Cargill committed to advance regenerative agriculture practices across **10 million acres** of land in North America **by 2030**



McCain Foods committed to implement regenerative agriculture practices across **100%** of McCain potato acres **by 2030**



General Mills committed to **1 million acres** of regenerative agriculture **by 2030**



Walmart works with suppliers to increase adoption of regenerative practices and commits to help manage at least **50 million acres of land by 2030**



# Regenerative Agriculture

Regenerative agriculture is an outcome-based food production system that nurtures and restores **soil health**, protects the **climate**, **water resources** and **biodiversity**, and enhances **farms' productivity** and **profitability**.

## Key principles



### Minimized soil disturbance

ADOPT NO-TILL OR REDUCED-TILL TECHNIQUES



### Plants in the ground year round

PLANT COVER CROPS TO PREVENT SOIL EROSION AND INCREASE CARBON INPUTS



### Diversified crops in time and space

EXPAND CROPS IN ROTATION AND ADOPT INTERCROPPING



### Precision application of biological and chemical inputs

DATA-ENABLED PRECISION PLACEMENT OF SEEDS, CROP PROTECTION AND CROP NUTRITION



### Integrated livestock when possible

CROP RESIDUES AND COVER CROP GRAZING, MANURE AND COMPOST INPUTS



# What is Syngenta Group's contribution to regenerative agriculture?

As the world's most local agricultural technology partner, Syngenta Group strives to transform agriculture through tailor-made solutions that support and enable farmers across the world to adopt regenerative agricultural practices, for the benefit of farmers, society and our planet.



Science to quantify environmental, agronomic, and economic outcomes



Technical advice and training to growers



Elite crop varieties with sustainability traits for climate resilience



New value chain partnerships to create premium markets for regenerative products



Biological technologies that enhance crop and soil health



Access to digital tools to unlock the potential of precision agriculture



Support access to finance for the transition to regenerative agricultural practices





Greensboro, USA



Raleigh, USA



Uberlândia, Brazil



Tel Aviv, Israel



Linyi, China



Nanjing, China



Enkhuizen, The Netherlands



Stein, Switzerland

>\$1.4bn

annual R&D investment

Leading

innovation pipeline

**As a global innovation powerhouse, we lead the way  
in accelerating game-changing innovation to bring  
farmers safe and sustainable new products**



A background image showing three scientists in white lab coats working in a greenhouse. One scientist in the foreground is looking through a microscope, another is holding a flask with green liquid, and a third is in the background. The greenhouse is filled with rows of seedlings in trays.

**Our scientists breed thousands of new seed varieties and explore over 100,000 new compounds every year**

**>6,000**

R&D experts

**>150**

years of experience in breeding, 30 years in biotech

**~10,000**

Patents across seeds varieties, crop protection and solutions

**>250**

years of experience in chemistry, 40 years in biologicals with Valagro

**Second to none**

Un-replicable library of millions of screened seed varieties and CP AIs

**Partner of choice**

for hundreds of universities, public and private institutions



# Our products help farmers to transform agriculture

## Artesian corn

Drought tolerant

Up to 40% higher corn yields in extreme drought



**YOOM**

More nutritious food

Higher in antioxidants and extended shelf life



**Enogen**

Feed efficiency

5% higher feed efficiency and improved ethanol productivity



## ADEPIDYN™

Lower application

Long-lasting control against fungal diseases and 20% lower application rate



## Crop Protection

Improved efficiency

Increases efficacy to improve crop yield while reducing environmental impact

**Asorbital™**  
FORMULATION TECHNOLOGY

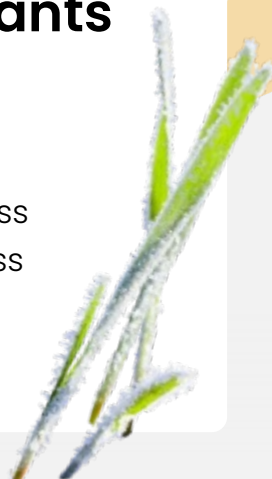


## Plant biostimulants

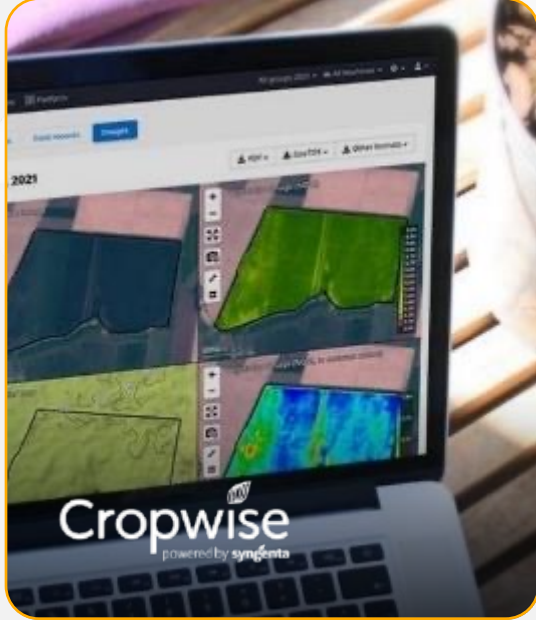
Surviving frost

Promotes vegetal growth during environmental stress and improves effectiveness of treatments

**MEGAFOL**

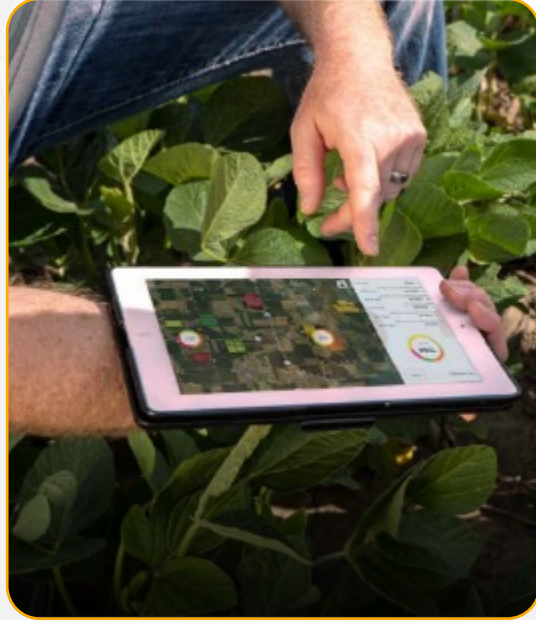


# We seek and move into new areas that help make farmers even more successful



## Digital platform

All-in-one digital farming solution with leading position in every region



## Unique seed placement tool

Optimizing seed selection and placement



## Precision farming

Driving increased productivity and sustainability through targeted application



## Innovative distribution services

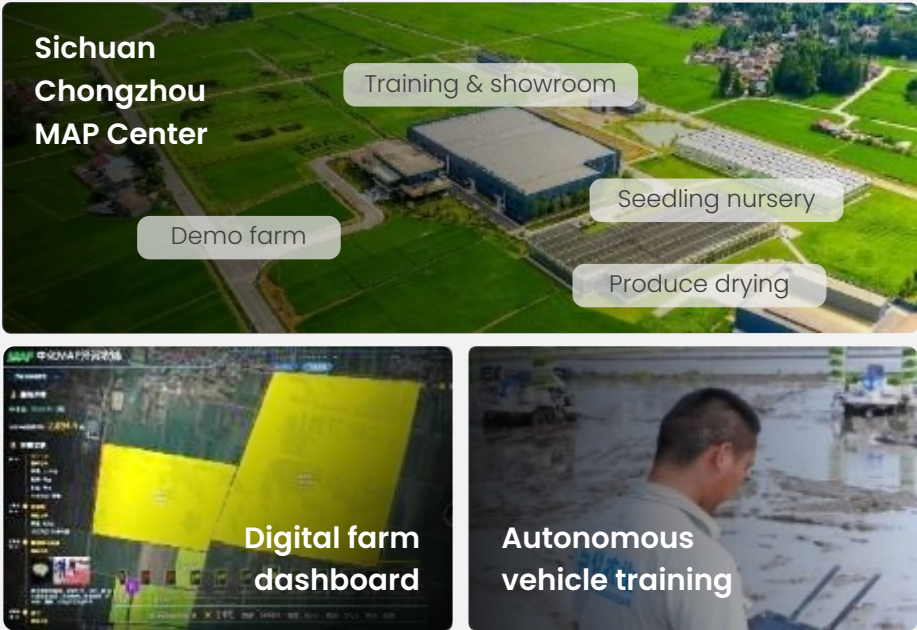
Growing direct sales networks



# The most exciting new business in the whole of agriculture



To transform agriculture in China our network of Modern Agriculture Platform (MAP) Centers help farmers to modernize their farms with new sustainable solutions and connecting them to premium buyers – increasing the quality of their crops and their profitability



## Rapid growing MAP center network: transforming agriculture side-by-side growers



# Leading the way in meeting consumer demand for sustainably grown great tasting and healthy food



## A KEY PART IS MAP BESIDE

A program that helps farmers grow very high quality, traceable crops in a climate-smart way and sell to commercial buyers at premium prices. The crops end up in China's Hema (or Freshippo) fresh grocery chain operated by Alibaba, the country's top online retailer.



**QR code provides  
traceability with data**



# Partnerships are essential to ensure we can feed the world while meeting the challenge of climate change

Bringing degraded pastureland **back into productivity** in Brazil

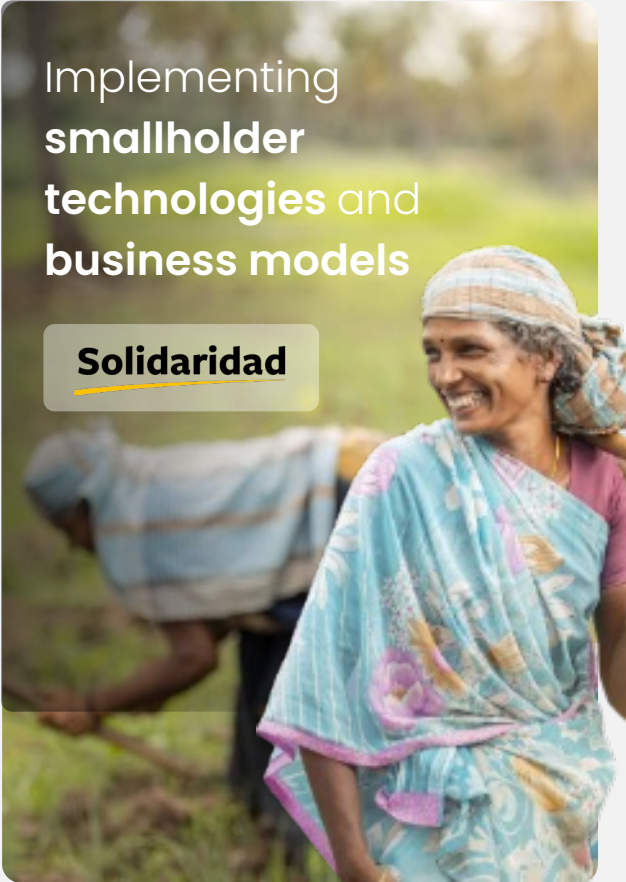


Reverte

The Nature Conservancy

Implementing **smallholder technologies** and **business models**

**Solidaridad**



Promoting **carbon soil retention** through our Run Tian program in China that encourages farmers to avoid burning leftover straw and crops



The Nature Conservancy

Helping thousands of farmers and their suppliers adopt and track **agronomic conservation practices**



Kellogg's





# We are proud to be the most geographically and culturally diverse company in agriculture

## Diversity provides a competitive edge

53'000 employees from 123 nationalities across more than 100 countries make our success possible



**#1 Ag employer**  
#6 overall in  
biotech innovation



**Member**  
of UN Women's  
Empowerment Principles



**Top quartile (A-)**  
Leadership Level climate  
change and water security



**Most customer –  
centric in Ag**  
only Ag company  
in Top 25 ranking



**Early implementer**



# An experienced international leadership team

Representing nationalities from across Europe, North America, the Middle East and Asia.



**Erik Fyrwald**

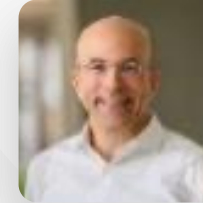
Chief Executive Officer

Through our diversity and the unparalleled capabilities of our four businesses we deliver breakthrough agricultural technology and digital service innovations for farmers.



**Jeff Rowe**

President  
Syngenta Crop Protection



**Chen Lichtenstein**

Chief Financial  
Officer



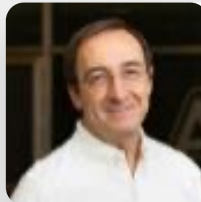
**Justin Wolfe**

President  
Syngenta Seeds



**Steve Landsman**

Group General  
Counsel



**Ignacio Dominguez**

President  
and CEO ADAMA



**Hengde Qin**

Chief Human  
Resources Officer



**Hongsheng Liu**

President  
Syngenta Group China

# Strong growth performance

## First Quarter Results 2023 (Q1)

Q1 2023 Group sales  
**\$9.2bn** +3% (CER +8%)



Q1 2023 Group EBITDA  
**\$1.9bn** +1% (CER +9%)

**syngenta**  
Crop Protection

Q1 2023 sales  
**\$4.3bn** +2%

**ADAMA**

Q1 2023 sales  
**\$1.6bn** -12%

**syngenta**  
Seeds

Q1 2023 sales  
**\$1.5bn** +12%

**Syngenta Group China**

Q1 2023 sales  
**\$3.0bn** +26%

Syngenta Group Full Year Results 2022: **\$33.4bn +19% (CER +22%)**

CER: Constant Exchange Rates.  
Note: The results in this presentation are an unaudited, pro-forma consolidation of the Business Units in the Syngenta Group including Yangnong Chemical, in which Syngenta Group acquired a controlling stake as of July 2021.  
YNC respective sales are consolidated as of January 2020; for internal purposes; we continue presenting YNC as appended to SGC, aligned with our 2021 budget. Syngenta Seeds figures include CNS and Winall in China.





# A record growth performance

## Full Year Results 2022

FY Group sales  
**\$33.4bn +19%** (CER +22%)



FY Group EBITDA  
**\$5.6bn +20%** (CER +25%)

**syngenta**  
Crop Protection

FY sales  
**\$16.3bn +21%**

 **ADAMA**

FY sales  
**\$6.7bn +16%**

**syngenta**  
Seeds

FY sales  
**\$4.7bn +14%**

 **Syngenta  
Group China**

FY sales  
**\$8.6bn +17%**

CER: Constant Exchange Rates.

Note: The results in this presentation are an unaudited, pro-forma consolidation of the Business Units in the Syngenta Group including Yangnong Chemical, in which Syngenta Group acquired a controlling stake as of July 2021. YNC respective sales are consolidated as of January 2020; for internal purposes; we continue presenting YNC as appended to SGC, aligned with our 2021 budget. Syngenta Seeds figures include CNS and Winall in China.



Helping farmers feed the world with safe,  
nutritious and tasty food

