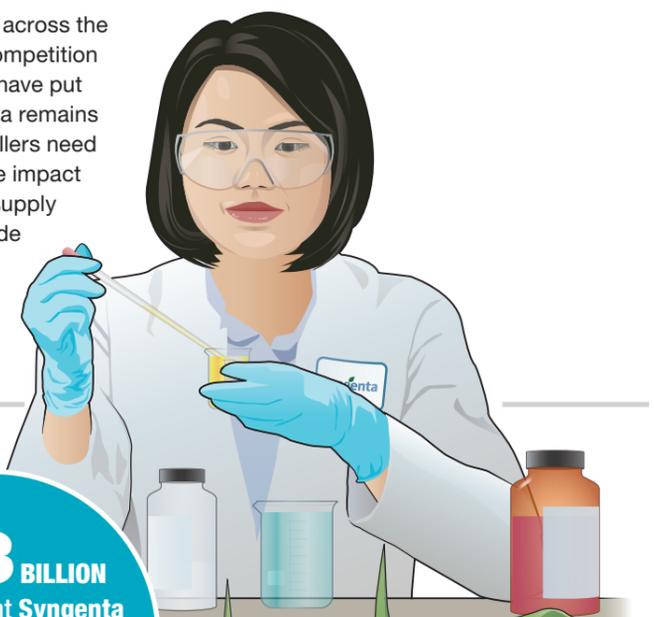


DELIVERING VALUE

Prices for crop inputs, including agrichemicals and seeds, are rising across the agriculture industry. Market dynamics—such as trade challenges, competition across industries, transportation bottlenecks and rising fuel costs—have put strong upward pressure on costs. Despite these pressures, Syngenta remains committed to providing the products and services growers and resellers need to maximize their success. To bolster innovation while minimizing the impact of price increases, Syngenta has put steps in place throughout the supply chain to help soften the impact of a down market. These steps include securing alternative sources for key production ingredients; having an extensive, reliable distribution network; and refusing to slow down the pace of innovation.

ILLUSTRATIONS: VIC KIKULIN



IN THE LAB

\$90 MILLION and **10.8 YEARS** are the industry averages for **bringing a new active ingredient** to the market.

\$1.3 BILLION is the amount Syngenta invests in global R&D every year. (That's \$3.5 million spent daily!)



IN THE FIELD

The Syngenta **industry-leading portfolio** includes

37 SEED TREATMENTS

34 HERBICIDES

44 FUNGICIDES

21 INSECTICIDES

+ 4 NEW ACTIVE INGREDIENTS and 15 NEW BRANDS will be introduced to the market **BY 2020.**



SUPPORT SYSTEM

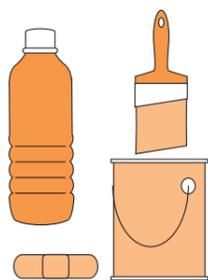
250+

NUMBER OF EXPERTS Syngenta has in **sales and agronomy** at the farm level in the U.S.



What's Driving Up Costs?

RAW MATERIALS



20 LARGE INDUSTRIES, including **pharmaceuticals, plastics and paints**, are vying for many of the **same raw materials** used in crop protection products.



MORE THAN 40% of **Chinese manufacturing facilities** have recently closed down due to regulatory concerns, causing a **shortage** of key **U.S. crop protection ingredients**.

SHIPPING COSTS



NATIONWIDE TRUCK DRIVER SHORTAGE is forcing shippers to pay a premium in bonuses and to prioritize shipments.

ALSO

The **ELECTRONIC LOGGING DEVICE** mandate is increasing transit times for truckers who must **log all work hours**, including time spent waiting in line for loading and unloading.



36 MILLION-TON INCREASE in **demand for chemical shipments** across industries is expected by **2020**, which is **+1.8 million shipments**.

BUT ONLY

1 IN 12 trucks will have the **proper equipment** to help **move the freight** on time.