Future of Farming Dialogue 2019

Big Challenges Require Bolder Approaches

Liam Condon
President of the Crop Science Division
Humanity faces Great Challenges

- Climate Change
- Growing Population
- Limited Natural Resources
Growing Population
Limited Natural Resources
Agriculture’s Paradox

Produce vs Preserve
We have the opportunity and ambition to help solve the paradox.
Our opportunity

Leading market position in all major crops...

Corn
~€20bn market²

Soybean
~€15bn market²

Horticulture
~€15bn market²

Cereals
~€10bn market²

Digital Farming
Climate FieldView
Digital platform

Note: Reflecting BCS' portfolio after divestments. Market sizes rounded to nearest $5bn.

Source: Pro-forma calculations Bayer, Bayer CS market model

¹ Includes fruits, vegetables, flowers and nuts.
² Includes seeds, traits, crop protection chemistries and environmental science; does not include fertilizer.
Our ambition

Shaping Agriculture to benefit farmers, consumers and our planet

Deliver world-class innovation

Pioneer the digital transformation

Set new standards of sustainability

Drive inclusive business growth with output-based business model

Tailored solutions are key to sustainably managing resources and improving productivity to feed a growing global population
Producing better
Short-stature Corn
Intacta RR2-Pro™
Helping farmers to reduce their overall environmental impact with innovation

Results from a peer-reviewed study

Taking 3.3 million cars off the road
20 million tons incremental yield
Conserving 200 million liters of water
From inputs to outcomes:

**Climate FieldView™**

Gather Data

Visualize & Tabulate

Compare & Benchmark

Diagnose, Recommend & Prescribe

Utilizing data & analytics to optimize decision-making & help farmers sustainably increase productivity
New Outcome Based Pricing Model

Leading Portfolio + Customized Prescription + Innovative Pricing = New Outcome Based Business Models

Value

RX
Reducing field greenhouse gas emissions by 30% from the most emitting crop systems in the regions Bayer serves.

Reduce the environmental impact of crop protection by 30% with new technologies that help scale down volumes & enable more precise application.

Empowering smallholder farmers to access sustainable agricultural solutions: >100M smallholders benefit, e.g. access to education, tailored solutions & partners.

Our sustainability commitments help advance a carbon-zero and more inclusive future for agriculture.
Effective weed control is crucial to enhance sustainability

Saves 1/3 of yields
Can enable no-till farming
Helps maintain soil fertility and prevents soil erosion

Bayer investing ~€5bn in alternative weed management methods to offer farmers more options for effective weed control
EUR 3 million awarded to 4 social innovators to improve the life of African smallholder farmers and their communities:

Tailored solutions & services
Value-chain partners
New technologies

Creating Ecosystems

to bring smallholders access to:
Investing in
Future Generations

4-6 November, Brasília
100 delegates from 45 countries, aged 18-25, developing projects to accelerate food security.

Youth Ag Summit

Educate future opinion leaders & consumers
Create & empower a network of youngsters who are passionate about Ag
Mobilize young leaders to agvocate for modern ag
Thank you

Twitter.com/bayer4crops
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