



Solid Demand and Stabilized Glyphosate Pricing Expected in 2025



Glyphosate

Branded Glyphosate-Based Herbicide Sales Normalizes as Generic Reference Price Slightly Below Historical Median



Market Trends:

- > Global demand continues to remain strong in 2025 with generic supply and channel inventory consistent with historical levels
- > Generic Chinese glyphosate technical reference spot price continues to trend slightly below 15-year historical median price

Our Strategy:

- > Maintain supply for ~40% global glyphosate market, with focus on the over-the-top markets in the Americas
- > Maintain brand premium over generic glyphosate-based herbicides with agile and strategic pricing; with focus on low-cost operating model
- > Distinctly steered in a competitive commodity market