

Emerging Markets Megatrend

A growing global population that desires new innovation...and wants it now



Emerging Markets

Deliver market-driven science to elevate the well being of people everywhere
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Top Five DuPont Businesses by Country/Region (2008 revenue basis)

India

1. Titanium Technologies
2. Pioneer Hi-Bred
3. Crop Protection
4. Performance Polymers
5. Packaging & Industrial Polymers

China

1. Performance Polymers
2. Electronics & Communications
3. Performance Coatings
4. Titanium Technologies
5. Packaging & Industrial Polymers

ASEAN

1. Titanium Technologies
2. Performance Polymers
3. Crop Protection
4. Packaging & Industrial Polymers
5. Electronics & Communications

The Challenge

A pre-eminent driver of global change is the growing population. In the last 10 years, more than 1 billion people have joined the global population which is now estimated at 6.8 billion people. To accommodate this explosion, economies are evolving at rapid paces. Infrastructure, such as highways and rail, are being constructed in places that never before had roads. New ways to protect lives in a world that is more densely populated are being developed. The emerging markets have different local challenges. In many instances, emerging markets are step-changing incumbent technologies. Countries such as China and India are building high-speed rail. Energy-efficient construction is taking place across the emerging markets. Innovation is delivering the high quality, sustainable materials that growing economies demand.

The DuPont Value Proposition

Our approach to growth outside the United States targets fast-growing industries as the increasing population needs more food, better infrastructure and transportation, and a greater emphasis on safety and security. Market-driven science plays a key role in our ability to penetrate and grow in an emerging market. We initially establish relationships with strong local supply chains and build a base of business with our existing offerings. As we gain market insight, we use our science capabilities to develop products that are tailored to the unique demands of the local market.

	Agriculture	Infrastructure	Photovoltaics	Automotive	Oil & Gas	Electronics	Biofuels
China	✓	✓	✓	✓		✓	✓
India	✓	✓		✓			
ASEAN	✓			✓	✓		
Latin America	✓			✓	✓		✓
Eastern Europe	✓	✓		✓	✓		✓
Middle East/ Africa		✓	✓		✓		

The Market Opportunity

DuPont sales in emerging markets grew by 80 percent in the past five years and accounted for nearly one-third of the company's \$30.5 billion sales in 2008. While 2009 emerging market sales estimates are expected to be down about 10 percent from \$9 billion in 2008, DuPont projects the market opportunity for emerging markets to be approximately \$13 billion by 2012.

Regional Growth Opportunities

DuPont was the first U.S.-based multi-national company to have established a wholly-owned legal entity in **China** in the late 1980s to capture business opportunities brought about by the "Open Door Policy" implemented in 1978. Over the years, DuPont has become well positioned in China with all major businesses entrenched. As China continues to grow, it is taking a more balanced approach in its development, addressing challenges resulting from greater demand for food; accelerating rural area development for better wealth distribution; the need for better environmental performance; and the shift to a more knowledge-intensive industrial structure as its population starts to age. All this presents business opportunities for DuPont in agricultural products, renewable energy, clean technologies, automotive, and more.



Latin America

1. Pioneer Hi-Bred
2. Crop Protection
3. Performance Coatings
4. Titanium Technologies
5. Packaging & Industrial Polymers

Eastern Europe

1. Crop Protection
2. Pioneer Hi-Bred
3. Building Innovations
4. Titanium Technologies
5. Performance Coatings

Middle East/Africa

1. Titanium Technologies
2. Performance Coatings
3. Pioneer Hi-Bred
4. Chemicals & Fluoroproducts
5. Crop Protection

Eastern Europe is rich in agriculture and natural resources. The region has a high level of education and high quality of human resources, and is in a modernization trend. The main sector of activities for DuPont in the region is agriculture, construction and automotive, as well as oil and gas.

In the past 15 years, the company has opened offices in the **Middle East** and invested in developing local talents. DuPont is a partner of choice for the some of the regions' key industries such as oil and gas where Middle Eastern oil represents 41 percent of global reserves. DuPont also is focused on regional opportunities such as the infrastructure boom where \$105 billion in infrastructure projects are planned or are under construction in the United Arab Emirates and construction contracts in Saudi Arabia's real estate market are expected to top \$60 billion in 2010. The MASDAR initiative in Abu Dhabi, an ambitious \$22 billion project, aims to becoming the world's first zero-carbon, zero-waste, car-free city.

In **Brazil**: DuPont has grown an average of 20 percent in the last five years. There are 11 production units in the country and 10 R&D stations. In 2009, DuPont inaugurated its Innovation & Technology Center in Paulinia to develop new applications for several businesses. In 2008, DuPont Brazil launched Armura®, an innovative and affordable armoring system using DuPont™ Kevlar®. In November 2009, the company will launch DuPont™ Rynaxypyr® in Brazil, combining strong insecticide power with sustainable characteristics.

When DuPont was founded in Wilmington, Del., in 1802, one of the raw materials for the company's first product, gunpowder, was imported from **India**. DuPont set up its India subsidiary in 1994 and now DuPont India has more than 1,500 employees. DuPont sees India not only as a key growth market, but also as a strategic partner particularly in the areas of the company's R&D and knowledge initiatives. India 2008 revenues were nearly \$500 million. The company has six production facilities in India in three locations (Vadodara, Madurai and Hyderabad) for Crop Protection, Pioneer Hi Bred, Engineering Polymers, performance Coatings and DuPont Chemicals and Fluoroproducts. Recent strategic expansion in India has included locating two global centers in the city of Hyderabad, India -- the DuPont Knowledge Center and the DuPont Services Center. Both became operational in 2008.

The Association of Southeast Asian Nations (ASEAN) countries stand at the center of the most dynamic economic region of the world with a population of nearly 583 million people (or equivalent to 8.7 percent of the world population) and a gross domestic product (GDP) of \$1.5 trillion in 2008. In efforts to enhance the region's power and competitiveness in the international trade community, ASEAN has recently announced its economic integration into a single market and production base of several products and services. The region's key industries are agricultural and food products and ingredients, automobile parts, electronics, oil and gas, and renewable energy. DuPont has been operating in the ASEAN region for more than 30 years. The key growth industries for DuPont in ASEAN region are agriculture, solar power, electronics and oil and gas.



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