



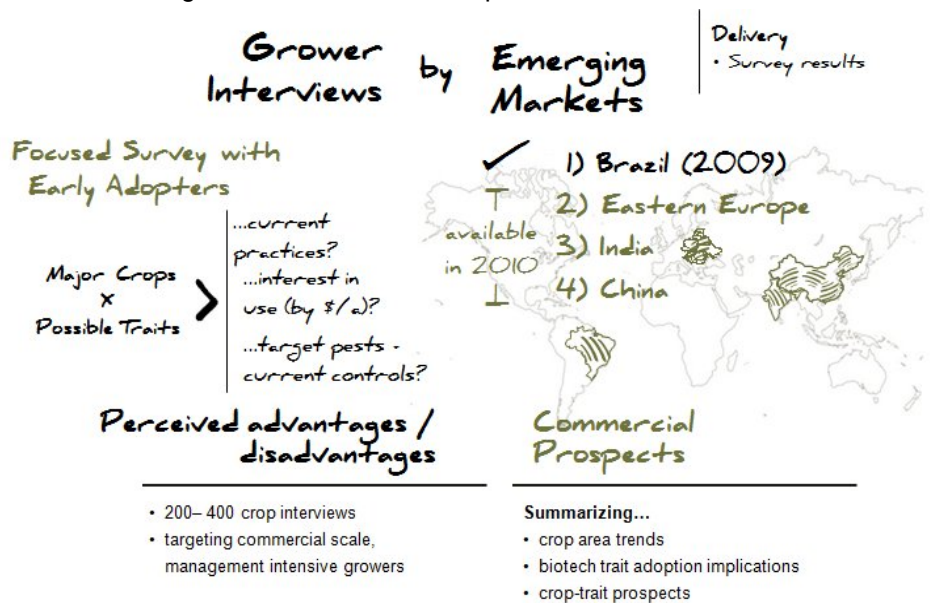
## FOCUS: BUSINESS/STRATEGY

### Context Emerging Market Outlooks

The global value of field crops in 2020 is projected to approach 40b USD. In our many and thorough analyses of seed and biotech industries and market segments, Context has noted that the U.S. – Canada region is expected to remain the largest seed and trait market through the forecast period. Seed markets in the EU, China and the rest of the world are expected to realize more modest growth reflective of the expected, more limited trait market expansion. However, emerging markets, Brazil, Argentina and India are expected to realize the highest compound annual growth rate among the major market regions.

Context appreciates that strategic discussions on the future of plant biotechnology are more robust when rooted in conversations with growers. Grower preferences and prospects on biotechnology are most revealing when placed in the context of regional crop production trends and productivity differences.

The 2009 edition of Plant Biotech Traits Commercialized, (BTC) dedicated a segment of the research to a 'deep-dive' focus describing biotech trait trends in a key emerging market, Brazil. In 2010, Context offers similar 'deep dives' in China, India, and Eastern Europe.



- Context has deep, relevant and significant bodies of research available in our multi-client reports including:
- ✓ Global Seed Market Database
  - ✓ Major Vegetable Crops Outlook
  - ✓ Major Field Crops Outlook
  - ✓ Biotech Traits Commercialized
  - ✓ Emerging Market Outlooks

Visit our website at [www.contextnet.com](http://www.contextnet.com) for more information or contact [mark.nelson@contextnet.com](mailto:mark.nelson@contextnet.com).

**The Context Network** provides business management and strategy consulting services to the world's leading agriculture, biotechnology and food companies and government agencies and institutions. Major areas of expertise include strategy, merger and acquisition support, valuation of new technologies, formation of alliances, and market research. The West Des Moines-based firm is composed of a core of professional consultants that is complemented by a network of hundreds of industry and subject-area experts.