

# Global Seed Sector 2020 Outlook: Major Vegetable Crops, 2<sup>nd</sup> edition, 2010



## BACKGROUND

As third-world countries expand economically and consumers there demand more and better food, a varied and resounding impact awaits global vegetable production and consumption, as well as the underlying vegetable seed marketplace. Differing economies, governments, consumer mentalities and cultural practices throughout the world's growing regions make the market layered and complex to analyze. Variable adoption of hybridization and biotechnology further complicate the picture.

In light of shifting economics and demand, and shifting global and regional economics, a comprehensive and segmented analysis of the vegetable seed market seemed a must to The Context Network.

This second edition multi-client study by The Context Network offers an in-depth investigation and analysis of the factors expected to drive market expansion in the global vegetable seed sector through 2020. The **Global Seed Sector 2020 Outlook: Major Vegetable Crops** packages actionable market knowledge for industry visionaries.

## MAJOR VEGETABLE CROPS: A GLOBAL MARKETPLACE OUTLOOK

This novel investigation analyzes influences on vegetable crop acreage and production, and seed pricing at the grower level. The core of the study includes projections of vegetable crop production and consumption, as well as forecasts for changes in seed use and seed market values. The outcome of thorough analyses includes identification of key growth factors, as well as important marketplace threats.

Additionally, the 2020 report explores the influence of biotech prospects, including regulatory issues unique with vegetable crops and the relevance of specific biotech traits for the vegetable sector. Even more importantly, from a sector growth perspective, the study examines the price-lifting effects of national and regional shifts from open-pollinated varieties to hybrids that add to the price-increasing influences of global competition for land.

*“Global vegetable seed market values will grow at a faster rate, driven largely by dramatic shifts in Asia.”*

### World Vegetable Trends, Impact

In its analysis, Context has identified key market expansion drivers including:

- ✓ expanding use of hybrid seeds,
- ✓ higher seed prices,
- ✓ the introduction of value adding trait technologies,
- ✓ increased population and per capita consumption.

In composite, these drivers point to increased fruit and vegetable consumption, and also to higher vegetable seed prices.

Globally, Context will detail global commercial vegetable seed sector growth from a current market value of \$3.8b in 2008.

### Outlook, By Region

Regional and country-level roles and shifts are identified in the 2020 report. For select countries and regions, Context presents a vegetable consumption outlook, key trends, the current market profile, and forecast of market dynamics through 2020.

Select Asian markets are expected to provide the largest growth market for vegetables, more than European Union and North American seed market expansions.

Elsewhere, Context is monitoring Mexico's industry developments, such as increasing use of hybrids and lifting seed prices. U.S. production practices, including the use of biotech traits, continue to move into Mexico. In contrast, the hybrid transition is nearly complete in Latin American nations.

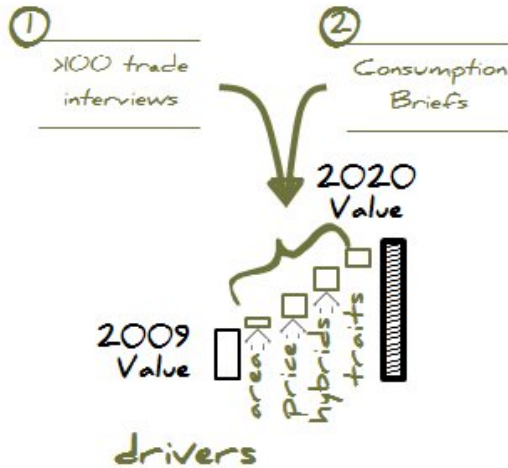
Global Vegetable  
Seed Market Value  
~ \$3.8b USD



- forecast of seed sector fundamentals for 17 major vegetable species
- forecast implications of future trait commercialization
- macro economic outlook (population and GDP forecast)
- consumption profile and trend outlook for select major country markets

## Current Global Vegetable Seed Market Shares by Region

Outlook opinions from 2 vantage points



### Study Component and Methodology

In *Global Seed Sector 2020 Outlook: Major Vegetable Crops*, Context has examined the industry through a multi-faceted lens. Contents of the report include: key findings and forecast interpretations, seed trade interview responses and commentary, biotech prospects for vegetable seeds, and the global macro-economic and vegetable consumption outlook.

Featured data include information from 100-plus direct, face-to-face seed trade interviews conducted worldwide between November 2009 and February 2010. These discussions tap the expertise of multi-national seed industry personnel as well as regional seed trade personnel, distributors, government officials and seed trade associations worldwide. Personal discussions with these representatives will cover topics that range from commercial vegetable consumption to factors affecting seed use and value, to most important growth drivers and threats they expect to be presented.

*“Worldwide per capita consumption of fruits and vegetables is projected to grow 15 percent.”*

## ORDER FORM

The *Global Seed Sector 2020 Outlook: Major Vegetable Crops* multi-client report sells for \$26,500. The pdf file can be sent via e-mail and/or CD-ROM format.

A personal presentation will be available for the cost of time and travel.

To protect our investment in this report and that of other subscribers, we agree to keep confidential study results within our company. We may make this report available to any subsidiary company in which we hold more than 50% interest or to a parent company that holds more than 50% interest in our firm. We understand that we may use or disclose any information in this report that is public knowledge or that was in our possession before receipt of the study, or that comes to us from third parties independently of this report.

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