

# Global Seed Market Database 2010

## BACKGROUND

Marked increases in value underscore the dynamic changes under way in the global seed sector marketplace. Significant market expansion has been recently realized.

Context analysts expect the rapid and dramatic transition of increasing value in seed to continue at an intense pace for the near future.

Context analysts have recorded global changes in the value of the seed sector and have rigorously monitored individual market segment developments over the past eight years.

Continued expansion, promoted by developments and commercialization of improved genetics and new hybrid crops will advance across markets and across geographies. Trait adoption/value creation and elevated commodity price levels have contributed to value being added to the seed and traits industry.

The Context investigation frames factors, both regionally and globally, to paint an encompassing valuation for seed industry executives and watchers. That insight will be captured in Context's dynamic resource, the **Global Seed Market Database 2010 (GSMD)**.

## THE CROP SEED MARKET-PLACE: A GLOBAL VIEW

The GSMD is a powerful information tool, providing insight into the worldwide seed market. With data and information collected from over 200 sources and reviewed by crop experts from each continent, the GSMD provides the comprehensive global data progressive companies need, without spending the weeks required to conduct independent research.

The GSMD 2010 report explores changes in key factors influencing the seed market including crop acreage, seed sector fundamentals and technology penetration. The report benchmarks past and current seed market values around the world.

Many subscribers find that the GSMD is very useful in differentiating between values of crops with dissimilar characteristics, especially the value of crops which incorporate new technologies versus those that do not. The analyses cover crops ranging from cotton and maize, to sugar beet, rapeseed, sunflower, rice and more. The database is set up to allow users to establish the parameters of the search while delivering customized results with the exact data the user needs.

With each year's report, Context's analysis describes dynamics by illustrating changes within key aspects affecting the seed sector's evolution.

## SEED MARKET ESTIMATES: A RECAP

In 2008, the value of global proprietary seed markets increased more than \$5 B USD over 2007 values. Since Context's 2001 global estimate, \$15B USD in value has been added to the global proprietary seed sector. Notably, this is the first time the value of the seed with traits segment topped \$10 B USD.

This 2010 edition of the report will explore changes in key factors influencing the seed market, including crop acreage, seed sector fundamentals and technology penetration. GSMD 2010 will benchmark past and current seed market values around the world.

*"Occurrences of 2008 will be a point of reference for one of the best years in world agriculture." Mark Nelson, Context Senior Associate*

### Recent Key Market Drivers

Significant market expansion in 2008 was attributed to several key drivers, including:

- Economic outlook and commodity price situation
- Stacked traits in the U.S.
- Hybrid use in Asia
- Weakening dollar in the U.S.
- Increasing acceptance of technology

Context Network's 2010 Global Seed Market Database Report tells the full story, identifying mega-trends for 2009 and beyond.

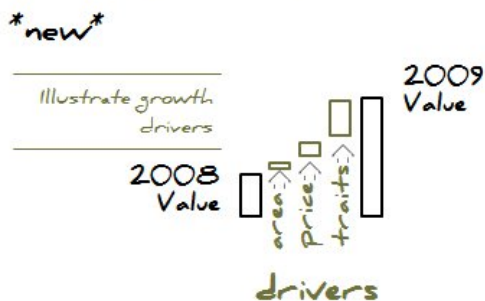
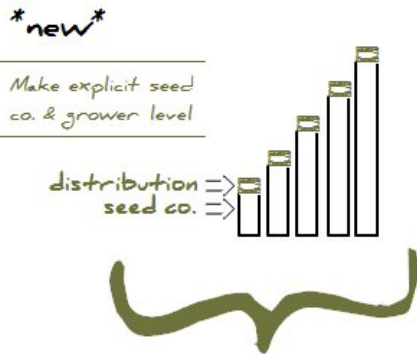
Summary charts of market valuation data are provided in the GSMD Summary Report, which communicates a top-line, executive summary of the global seed sector's market valuation and recent dynamics.



- country-crop market estimates
- 2009 update of valuation elements, a nine year time series, 2001 - 2009
- all major field and vegetable crops

- select major markets
- 2009 company shares, a six year time series, 2003-2009

## Market Value



New to GSMD, the 2010 edition will provide market valuation estimates at both the Seed Company and Grower Levels.

Growth driver estimates will also be summarized more explicitly in the Summary Report.

### About the Database and Methodology

Context Network Global Seed Market Database includes 48 crops in 230 countries categorized by six different regions. GSMD takes a country-level by crop approach in its modeling, offering the opportunity to describe major directional changes in fundamental "levers" of country level seed sector value. Modeling these levers in aggregate provides characterization of industry megatrends.

The database's unique design provides its subscribers with an objective, thoroughly researched resource describing the global seed sector's market valuation dynamics. Both market valuation and share data are provided in the database. Market valuation data is characterized by data level, interface and report features. Subscribers can also access summary charts of market valuation data on a special GSMD website.

## ORDER FORM

The purchase price of the **Global Seed Market Database 2010** is \$28,500.

- o A global *vegetable seed market only* version of the database is available for \$16,000.

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

### To subscribe to GSMD 2010, please read and agree to the following statement:

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