



Background

Growth in field crop seed markets has been dramatic over the past decade. Biotech innovations have both lifted and shifted value to seed.

Context's review of biotech trait pipelines for major multinational and boutique biotech companies promises potential of continued strong growth in seed market value over the next fifteen years. Still, key uncertainties remain:

- Can accelerated rates of productivity improvement be achieved?
- If so, will demand keep pace?
- What impact will generic traits have on trait premiums?

This third 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 field crops seed sector through 2025. The **Global Seed Sector 2025 Outlook: Major Field Crops** packages actionable market knowledge for industry visionaries.

Major Field Crops: A Global Marketplace

This multi-client study by The Context Network is an in-depth investigation and analysis of the factors expected to drive market expansion in the global field crops seed sector through 2025.

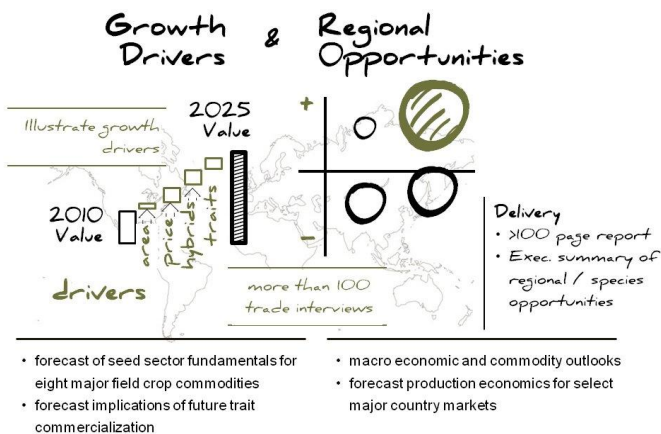
Globally, Context will detail commercial field crop seed sector growth from a 2009 market value of \$25b.

Key data are presented analyzing influences on major field crops acreage and production, and seed pricing. The outcome of thorough analyses includes identification of key growth drivers, as well as possible marketplace pitfalls.

World Field Crops Trends, Impact

GSSO 2025 Major Field Crops focuses on key production agriculture demand fundamentals, such as food security and biofuel production. These factors have the potential to keep grain/oilseed inventories comparatively tight versus historical levels, possibly sustaining elevated commodity prices, albeit with more volatility, through the forecast period. The fundamental relationship for seed prices is that they expect to change in relation to anticipated farm revenues.

2009 Global Field Crops Seed Market Value – \$25b USD



The report monitors key market expansion drivers including:

- Both changes in acres planted with traits and traits planted per acre
- Seed price developments in relation to commodity price forecasts
- Commercial development impacts, such as privatization and hybridization, expected within major global country-crop markets

Analytics performed to describe major impacts are clearly summarized as either, (i) biotech trait, (ii) seed price, (iii) commercial transitions (such as increases to bought seed, most notably higher value hybrids), (iv) and seed volume (changes in crop area and planting rates).

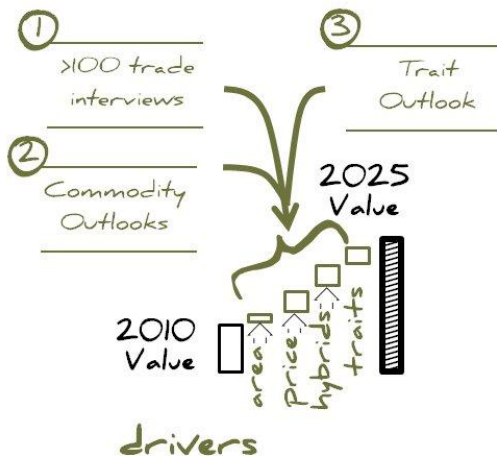


We offer transparency in articulating these forecast assumptions, so that these results can serve as areas of discussion to cross-check and challenge your internal assumptions on projected crop, trait and regional roles and shifts

The GSSO Major Field Crops study investigates projected growth of major field crop seed market value by major geographies. Biotech trait impact will be significant, but will vary in major regions across the world. Anticipated commercial trait value expansion will be strongest for the major field crop seed market in the Americas.

The U.S. – Canada region is expected to remain the largest seed and trait market through the forecast period. Emerging markets, Brazil, Argentina and India are expected to realize the highest CAGR among the major market regions. 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.

Outlook opinions From 3 vantage points



Study Component and Methodology

In *Global Seed Sector 2025 Outlook: Major Field Crops*, Context has carefully and comprehensively evaluated, valuated and analyzed the field crops seed market. Contents of the report include:

- I. Key Findings – global, regional and crop opportunity evaluations
- II. Seed and Trait Projections
- III. Macro Economic – commodity outlook
- IV. Analysis: Projecting Seed Expenditures – farm gate revenue & seed market
- V. Projections
- VI. Seed Sector Fundamentals for Crop Markets in Transition
- VII. Definition of Key Terms and Study Scope

Order Form

The purchase price of Context's
Global Seed Sector 2025 Outlook: Major Field Crops
is \$26,500 USD.

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.

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