

FOCUS: SEED

Global Vegetable Seed Industry Database Previews 2020

Context Consultants project increased vegetable consumption, higher vegetable seed prices, and forecast much more via the first-ever vegetable seed industry market database. With its **Vegetable Seed Industry Vision for 2020 Report**, Context Network has synthesized vegetable seed marketplace data as never before.



Context Senior Associate, Mark Nelson

The study forms the basis for the Global Vegetable Seed Industry Database, from which periodic updates and reports will be available to subscribers. Contributing to the report are data from 100-plus in-depth interviews conducted worldwide, tapping the myriad expertise from multi-national seed industry personnel to regional seed trade personnel, distributors, government officials and seed trade associations.

“Our discussion with these experts, as well as the analysis that followed, led to the discovery of important consensus points within the global vegetable seed industry. Impact of these findings will be felt in the industry through 2020 and beyond,” said Mark Nelson, Context Consultant.

Among the 2020 Report’s projections is a look at the impact of national and regional shifts between open-pollinated crops and hybrids. Analyses include forecasts of growth in protected culture production, including heated glass houses, plastic houses, tunnels and shaded production. The study gauges the influences of global competition for land on grower seed prices, and assesses the potential role of vegetable crop limiting factors such as crop disease.

In collaboration with NextLegacy, Context tapped the expertise of 40-year vegetable seed industry expert Tom McBride.



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McBride said these interviews were revealing. “Worldwide per capita consumption of vegetables is projected to grow by a 3-5% CAGR. As this growth occurs and Asian seed markets transition to hybrids, many other market influences—including land competition influenced by biofuel production, and bioengineered traits—will provide additional opportunity for lift in seed prices.”

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Broad View of GSS 2020 Outlook: Major Vegetable Crops Study Elements

- Three elements - GSMD 2008, Vegetable Consumption Forecast and NextLegacy’s Trade Interviews - provide the cornerstones the Global Seed Sector (GSS) Outlook.
 - GSS 2020 Outlook incorporates forecast analytics on seed expenditures, market transitions of commercialization and/or hybridization, and grower adoption and sector value creation of enhanced seed traits.
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The 2020 Report explores the influence of food safety concerns, along with changing views of retail sales channels, their future roles and size. Market value growth is projected, influential drivers are established, and critical industry benchmarks are set, Nelson said. “Industry stakeholders will find this study and, ultimately, a subscription to the Global Vegetable Seed Industry Database to be a fundamental and powerful tool in managing planning, allocating resources, and contributing to inventory and marketing considerations,” Nelson said.

To purchase the 2020 study and the supporting 2007 Global Vegetable Seed Industry Database contact: Mark Nelson: mark.nelson@contextnet.com or visit www.contextnet.com, then Products and Services, Multi-Client Reports.

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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 more than 100 industry and subject-area experts.