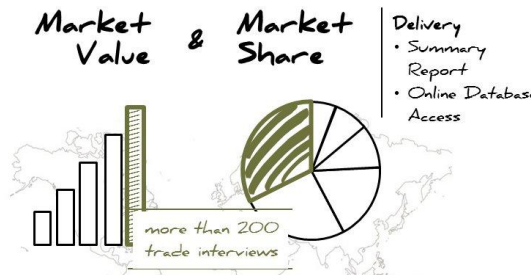




Introducing Context's Global Seed Market Database 2012

Expansion continues in the global proprietary seed industry. Over the past decade, The Context Network has recorded economic change and monitored seed dynamics along with the forces pressing on grower seed purchasing decisions. These results are published in Context's **Global Seed Market Database 2012 (GSMD)**.

GSMD is widely recognized as the leading global seed-trait database providing detailed insight into the worldwide seed market. Using data and information collected from over 200 sources and reviewed by crop experts from each continent, **GSMD 2012** is THE source for global data that progressive companies use to support decisions made in an increasingly fast-paced and necessarily fact-based business environment.



- country-crop market estimates
- 2011 update of valuation elements, a eleven year time series, 2001 - 2011
- all major field and vegetable crops
- select major markets
- 2011 company shares, a eight year time series, 2003-2011

Value, Growth, Emerging Trends

GSMD 2012 is an important tool for monitoring the global confluence of events that impart and affect outcomes central to our seed and agricultural industry. It puts the seed market in context – providing a defined global perspective on strategic trends and the impact and degree of change occurring within markets - emerging through mature.

“GSMD notes the value of the global seed industry at \$37B USD. In 2011, the industry’s global annual growth rate slowed to less than 10 percent following six years of double digit yearly growth.”
Context Partner, Mark Nelson

The **GSMD 2012** report explores changes in key factors influencing the seed market including crop acreage, seed sector fundamentals, technology penetration and company market shares. The report benchmarks past and current seed market values around the world and differentiates seed values within crops having multiple characteristics (e.g. hybrid vs. open pollinated, biotech vs. conventional, protected culture vs. open field, fresh vs. processor).

Context Partner, Mark Nelson notes “The report also highlights the first wave of GM traits maturing in the U.S. corn trait market. Technology packages for insect protection have begun to segment and seed providers are balancing their seed product lineups accordingly. In addition, new technologies including water and nutrient utilization products are coming to market amidst very dynamic times and strong economic fundamentals.”

GSMD 2012: A Powerful Analysis Tool

Many subscribers find that Context's **GSMD** is very useful in differentiating between values of crops with different characteristics, especially in comparing the value of crops that incorporate new technologies to those that do not. Analyses cover 10 leading field crops and 18 leading vegetable species. **GSMD** is designed to allow users to modify and adjust search parameters and receive customized results and data extracts to meet each user's specific needs and expectations.



About GSMD 2012

GSMD 2012 provides a comprehensive global database, offering extracts by country, crop and trait:

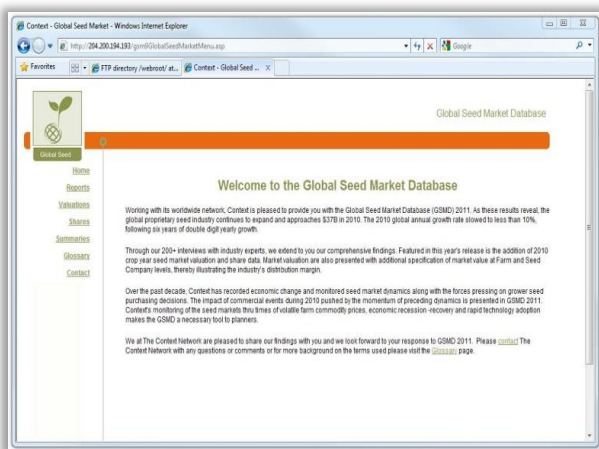
- » Executive & detailed summaries of key annual changes in seed market values, such as notable changes in...
 - Trait adoptions (esp. U.S. & Brazil), hybrid use (esp. Asia), crop area and seed prices
 - Leading company market shares from 21 select country field crop markets, >80% of seed market value
 - Global – regional market share estimates of leading vegetable seed companies
 - Query tools on summaries, extracts, and reports of global, regional, or country level seed market data

In addition, **GSMD 2012** provides market data and information collected from over 200 sources and reviewed by regional crop experts worldwide:

- » Gathers economic, valuation, and directional market intelligence
 - Provides distributor and dealer pricing and valuation dynamics
 - Integrates trade-specific and public sources
 - Assembles vast amounts of public sources on crop area
 - Includes data from >200 executive style interviews by >10 seed trade experts around the world

Database and Analytical Capabilities

This combination provides subscribers interested in a broad view of the industry and its future with a more powerful and comprehensive view of important trends and potential outcomes in the dynamic agribusiness world that is seed and plant biotechnology traits.



Vision, Perspective, Value

GSMD 2012 provides subscribers with quantified global country seed market value, built up from acres, planting rates and seed prices. Exceptional value is provided in its ability to benchmark current and past (back to 2001) seed market values around the world. **GSMD 2012** allows users to differentiate seed values within crops with dissimilar characteristics including:

- by crops grown with hybrid vs. open pollinated
- by crops leading certain biotech traits vs. conventional
- by vegetable species grown in protected culture vs. open field
- by vegetable species grown for fresh vs. processor markets

Ultimately, **GSMD 2012** is the industry's iconic and most comprehensive analysis tool providing its users critical perspective and valuation comparison in this essential, vibrant and growing industry.

“GSMD 2012 is an important tool that helps monitor the global confluence of events that impart and affect outcomes central to our seed and agricultural industries. It puts the seed market in context – providing a defined global perspective on strategic trends and the impact and degree of change occurring within markets – emerging through mature.”
Context Partner, Mark Nelson

For more information on **GSMD 2012**, or Context's *Global Seed Sector Outlook 2025: Major Vegetable Crops, or Plant Biotech Traits Commercialized 2012* contact Mark Nelson at: mark.nelson@contextnet.com.

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