

## The World's Top 10 Seed Companies - 2006

### World's Top 10 Seed Companies Based on 2006 Seed Revenues

<i>Company</i>	<b>2006 seed sales US \$ millions</b>
1. <b>Monsanto + Delta &amp; Pine Land</b> (US) <i>pro forma</i>	\$4,476
2. <b>Dupont</b> (US)	\$2,781
3. <b>Syngenta</b> (Switzerland)	\$1,743
4. <b>Groupe Limagrain</b> (France)	\$1,035
5. <b>Land O' Lakes</b> (US)	\$756
6. <b>KWS AG</b> (Germany)	\$615
7. <b>Bayer Crop Science</b> (Germany)	\$430
8. <b>Takii</b> (Japan) <i>estimate*</i>	\$425
9. <b>Sakata</b> (Japan)	\$401
10. <b>DLF-Trifolium</b> (Denmark)	\$352

**Source: ETC Group**

**Based on 2006 revenues, the top 10 seed corporations account for \$13,014 million or 57% of the commercial seed market worldwide.**

**The top 3 seed companies account for \$9,000 million – or 39% of the commercial seed market worldwide.**

**The top 4 seed companies account for 44% of the commercial seed market worldwide.**

**The world's largest seed company, Monsanto, accounts for 20% of the world's commercial seed market.**

**Concentration Trend Accelerates:** According to estimates provided by industry analysts, Context Network, the value of the overall commercial seed market was \$22,900 million in 2006 (includes seeds purchased from public breeding programs).<sup>i</sup> By contrast, just two years ago, ETC Group reported that the top 10 accounted for 49% of the worldwide market. In 1996 – one decade ago – the top 10 seed companies accounted for 37% of the worldwide market – and Monsanto did not even appear on the list.

**Proprietary Seed Market:** The market share of the top 10 seed companies is even greater when looking at the proprietary seed market (that is, brand name, commercial seed – subject to intellectual property). **According to Context Network, the global proprietary seed market was worth \$19,600 million in 2006.**

- **In 2006, the top 10 companies (all proprietary seed sellers) account for \$13,014 million – or 66% of the total proprietary seed market.**
- **Monsanto – the world’s largest seed company – accounts for 23% - almost one-fourth of the global proprietary seed market.**
- **The top 3 companies – Monsanto, Dupont and Syngenta – account for \$9,000 million – or 46% of the total proprietary seed market.**
- **The top 4 companies account for \$10,035 million – over half (51%) – of the total proprietary seed market.**

\* Note: Takii is a private seed company based in Japan that specializes in vegetable seeds. The company is not required to disclose annual seed revenues. Based on available information, we estimate that Takii’s seed revenues were \$425 million in 2006.

ETC Group, formerly RAFI, is an international civil society organization headquartered in Canada. The ETC Group is dedicated to the advancement of cultural and ecological diversity and human rights. [www.etcgroup.org](http://www.etcgroup.org). The ETC Group is also a member of the Community Biodiversity Development and Conservation Programme (CBDC). The CBDC is a collaborative experimental initiative involving civil society organizations and public research institutions in 14 countries. The CBDC is dedicated to the exploration of community-directed programmes to strengthen the conservation and enhancement of agricultural biodiversity. The CBDC website is [www.cbdcprogram.org](http://www.cbdcprogram.org)

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<sup>i</sup> Personal communication with the Context Network. <http://www.contextnet.com/>