

SEED: A Global Industry

Seed can cross up to six borders before being planted by a farmer. Therefore, the international movement of seed is critical for the success of U.S. seed companies. Strong free trade agreements are a vital tool to maintain and expand market access.

NAFTA countries alone account for \$610 million in annual exports, making Mexico and Canada our two largest export markets. While ASTA is supportive of strengthening the North American Free Trade Agreement (NAFTA), any negotiated changes to the NAFTA should do no harm.

Seed movement throughout the Asia-Pacific market is critical for the commercialization of new varieties and future seed export growth. Free trade agreements create regional trade rules and practices, which reduce non-tariff barriers to trade that the seed industry faces globally. Given the global nature of the seed industry, coordinated regional and global policies are necessary for U.S. seed companies.

Seed Industry Position: ASTA supports a strong trade agenda. Eliminating tariff and non-tariff barriers to trade, promoting stronger intellectual property rights and harmonizing regulations are ASTA's top priorities for expanding global trade.

About ASTA: Founded in 1883, the American Seed Trade Association (ASTA) represents over 700 companies involved in seed production, plant breeding and related industries in North America. ASTA's broad membership offers varieties from alfalfa to zucchini and all production types including conventional, organic and biotech.



Exports by the Numbers

- Total 2017 Ag Exports: \$138 billion
- Total 2017 Seed Exports: \$1.8 billion
- Seed Exports Add:
 - › 4,800 jobs
 - › 2.2 billion in business activity
- Vegetables, grasses, corn and soybeans are the most commonly exported seeds
- Top Exporting States:
 - › California (\$532m)
 - › Oregon (\$177m)
 - › Illinois (\$98m)
 - › Texas (\$93m)
 - › Idaho (\$57m)
 - › Arizona (\$56m)
 - › Michigan (\$52m)
 - › Iowa (\$46m)

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Ensuring Open Markets

Market Access Program (MAP) funds enabled industry experts to meet with Chilean regulators to prevent the adoption of non-science based phytosanitary measures. The experts presented MAP-funded data proving that the regulation was not technically justified and that proposed requirements were impossible for the U.S. seed industry to comply with. The regulations would have closed a \$17 million market to U.S. seed companies, but the economic loss would have been much greater. Chile is critical for counter-seasonal production and variety research and development. The impact would have rippled through U.S. seed company operations and directly impacted U.S. farmers and ranchers. Without access to Chile's winter growing season, research would slow and U.S. farmers and producer would have to wait longer for improved varieties to be commercialized.

Successful Public-Private Partnership

- ASTA has participated in FMD since 1963.
- The association became a MAP cooperator in 1994.
- The seed industry matches public dollars received through these programs at a rate of 1,200%.

Protecting Intellectual Property

For over a decade, Foreign Market Development (FMD) funds have enabled ASTA to work with the Chinese National Seed Association (CNSA). Through a Memorandum of Understanding, ASTA advocates for stronger intellectual property (IP) protection for plant breeders. While reviewing their seed law, Chinese regulators met with ASTA six times, including a two-week trip to the U.S. Many U.S. recommendations were included in the final law. Now the Chinese government is reviewing its Plant Variety Protection Act (PVPA) and again, ASTA is actively engaging with the government. The Chinese government's new law will provide IP protection consistent with the strictest global standards. Strong IP protection is critical for U.S. companies to sell seeds into any market. U.S. seed exports to China have grown by 15% since the new seed law was adopted. However, exports are still quite small given the size of China's agriculture industry. U.S. companies are reluctant to sell seed to China. However, with stronger IP protection, China could become our largest export market.

Supporting the USDA

ASTA has utilized MAP and FMD funds to facilitate a coordinated, global effort to encourage policy alignment on plant breeding innovation, such as genome editing. Alignment is critical to ensure that international trade is not hindered in the future. Government and industry representatives from over a dozen countries have joined four meetings on this topic which would not have been possible without this support. USDA leveraged these opportunities to host additional government-to-government meetings. This effort has enabled the U.S. to proactively influence a rapidly evolving global conversation.



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