

# THE U.S. SEED INDUSTRY AT A GLANCE

## The U.S. Seed Industry is Diverse and Robust

- ✓ The U.S. seed industry researches, develops, produces and distributes all varieties of seeds – including grasses, forages, flowers, vegetables, row crops, and cereals.
- ✓ The U.S. seed industry is a thriving industry that has an estimated \$15 billion market value.
- ✓ The U.S. seed industry is both the largest market for seeds in the world and the largest global exporter of seeds, with an annual export value of over \$1.25 billion.

## The U.S. Seed Industry is Innovative

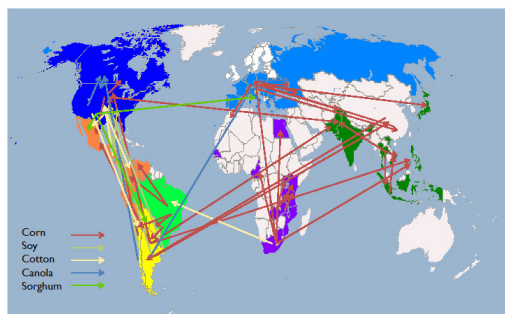
- ✓ Developing new tools for plant breeding is essential to addressing the challenge of limited genetic diversity for important traits such as:
  - Resistances to pathogens and diseases
  - Water and nitrogen use efficiency
  - Drought tolerance
  - Improved nutrition and taste

At any one time, a seed company could be moving thousands of different—and distinct—seed varieties internationally as part of the process of developing new varieties for the market.

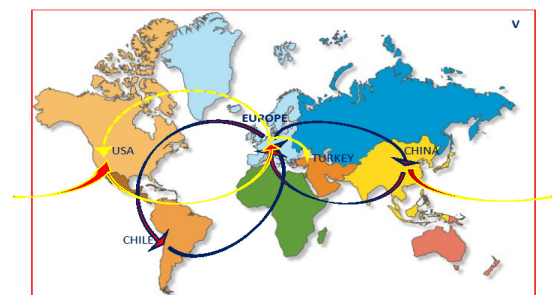
## The U.S. Seed Industry is Global

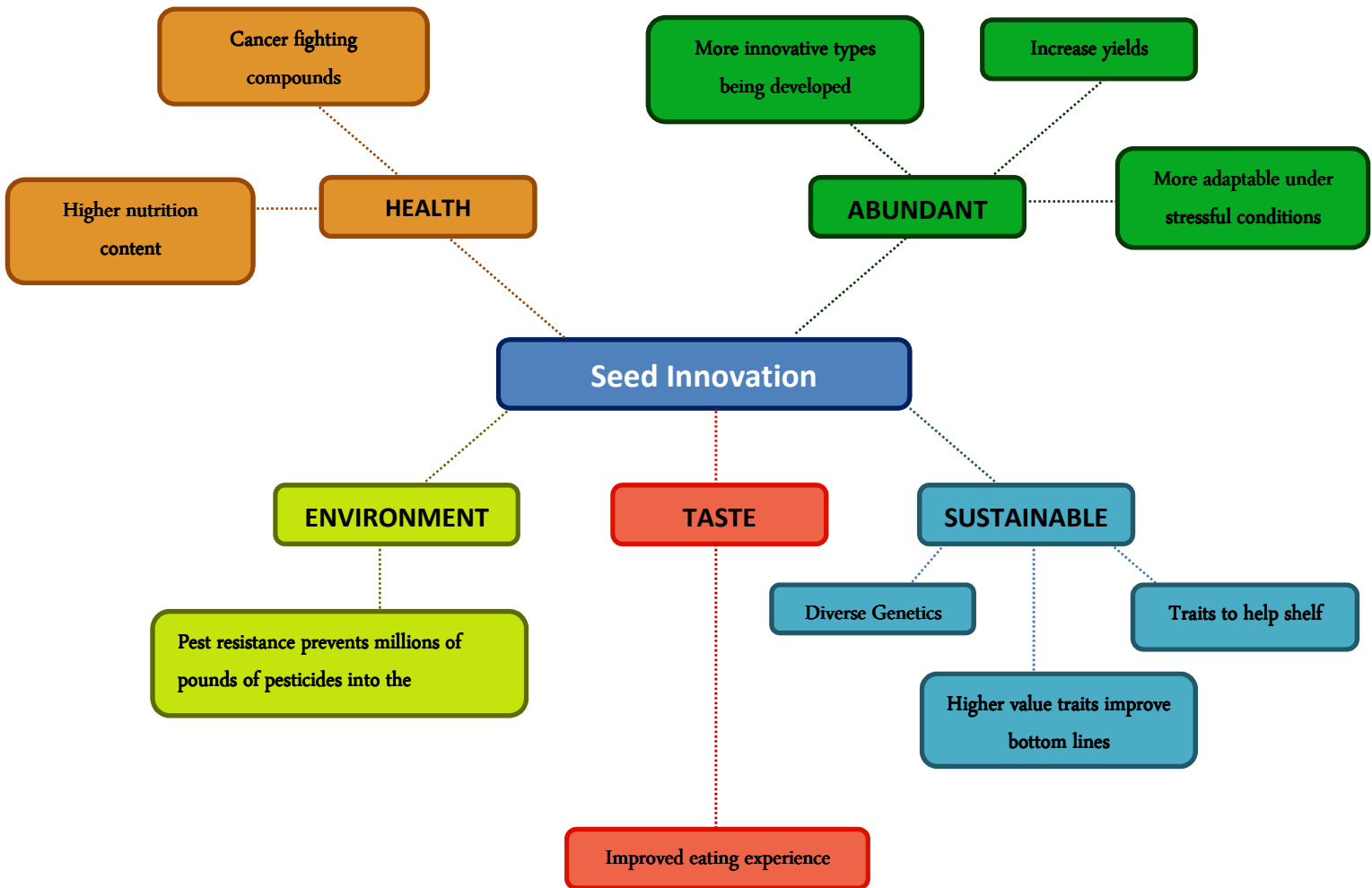
- ✓ Movement across national borders is an integral and essential part of variety development.
- ✓ Seed movement is critical for the development of:
  - Foundation and breeder seed lines used in research and development
  - Parental seed and stock seed production
  - Commercial seed production
  - Processing and packaging of commercial seed

GLOBAL SEED FLOWS



Potential pathway of a tomato variety





Produce Examples	Field Crop Benefits
<ul style="list-style-type: none"> <li>• Sweet onions</li> <li>• Seedless watermelon</li> <li>• Snack sized tomatoes, carrots, cucumbers</li> <li>• Multi-leaf lettuce</li> <li>• High lutein spinach</li> <li>• High carotene carrots</li> </ul>	<ul style="list-style-type: none"> <li>• Modified oil or carbohydrate composition</li> <li>• Anti-nutrient reduction</li> <li>• Lignin reduction for improved digestibility</li> <li>• Phytate reduction to increase phosphorous availability</li> </ul>