



Indian Seed Sector - Opportunities Beyond India & Its impact on small holder farmer incomes

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Seed Export Development

- Many Strategic steps to be taken to make India as “Seed Valley” to help India develop as seed export hub.
- India should aim for at least 10% of the total global seed trade of 14B\$ by 2030 (currently around 200M\$ exports)
- Current leaders in this market –
 - Chile, South Africa, Australia & others (Field Crops)
 - China, Japan, South Korea, Europe & others (Vegetables)

India's strengths

- Diverse agroclimatic conditions
- Technical manpower
- Well developed seed industry with seed production and processing capabilities
- Tropical and Sub-tropical climate

India's weaknesses

- Lack of strong processes for Intellectual Property development and protection
- Not a strong culture of respecting others' IP
- Quality standards and compliances not world class
- Seed Enhancement technologies to suit machine planting - not well developed
- Respect for contracts and time schedules ?
- Lack of infrastructure and policy overlay for seed export development

India's Opportunities

- Custom Production
- Counter Season Production
- Develop varieties for global markets, produce and export
- Joint Research Projects with outside companies to develop new varieties for other countries, produce and export

	Category of seed exports	Policy support needed
1	Custom production & counter season production of both GM and non-GM seeds	<ul style="list-style-type: none"> a. Such varieties should be exempted from registration. b. Special category of approval for such GM seeds by GEAC with minimum data. c. Flow of parent seed into India and produced seed from India should be freely allowed without any delays. d. IP protection for parent seed that is coming into the country for custom production purposes.
2	Export oriented seed varieties development, production and export	<ul style="list-style-type: none"> a. Such varieties should be exempted from registration b. Export of produced seed from India should be freely allowed without any delays. c. Time bound approvals from NBA for export of Indian varieties.
3	Seed production for both domestic and export markets	<ul style="list-style-type: none"> a. Registration mandatory for such products b. Time bound approvals from NBA for export of Indian seed varieties.

India as a global seed production hub - Policy support needed



1. A national policy on developing seed exports which makes it a smooth process across several stakeholders like Central Govt, State Governments, NBA, GEAC, Ports, etc.
2. Dry Port facilities for quick movement of seed, closer to production centres. For example, Bangalore, Coimbatore, Hyderabad, Aurangabad, Ahmedabad, etc will need such a facility. Each port should have warehouses suitable for seed storage, seed quality testing facilities recognized globally (Pvt or PPP) & PQ facilities.
3. Setting up export zones with necessary infrastructure closer to dry ports, where export oriented processing and packing facilities can be set up by industry.

India as a global seed production hub - Policy support needed



4. A predictable policy regarding export of seeds – clarity between grain export & seed export to avoid frequent ban on exports of seeds (Eg. Rice)
5. Financial incentives for seed exporters which will help them to compete with Chile, Argentina, South Africa and other major exporters.
6. Financial incentives for vegetables seed exporters for construction of Green Houses which increase certainty of production and meeting export obligations without fail.
6. Seed Export Promotion Council with representatives from Government, States, industry, scientists and others.
7. A special cell in the Ministry of Agriculture that deals with export promotion and facilitation – efficient disposal of export permits, import permits, PRA, etc

Impact of increase in domestic and export business



- Seed Industry expected to reach 5B\$ domestic + 1.5 B\$ export by 2030.
- Increasing SRR, Biotechnology, Mechanization and Digital technology will drive domestic growth
- Massive increase in seed production requirements and capabilities
- Diversify seed production & processing areas to mitigate risks and to manage costs
- Large investments in infrastructure, capacity building , Quality upgradation
- Increase research investments from current 3% of revenue to at least 6% to develop world class plant varieties with climate resilience & natural resource conservation.

Impact on farmers welfare



- Increased seed production will put more money in more farmers pockets.
- Profitability of seed production is higher than commercial cultivation in many crops

Eg. Hybrid Rice

Hybrid Rice seed production Rs. 37000/ac profits vs

Rice commercial cultivation Rs. 28000/ac profits

E.g. Hybrid Corn

Hybrid Corn seed production Rs. 32000/ac profits vs

Corn commercial cultivation Rs. 27000/ac profits

Impact on farmers welfare



- Increased seed production will put more money in more farmers pockets.
- Profitability of seed production is higher than commercial cultivation in many crops
 - almost Rs. 4000 -6000 per acre higher profits in seed production
 - varies between crops and hybrids depending on many factors
- Seed companies will spend more on social infrastructure development of seed villages – benefit for farmers families and the society around them.

Conclusions



- Huge opportunity outside India (15B\$)
- Calls for focused efforts from industry –
 - Research, Product Development, IP, Seed Production volumes, Quality, Market Development, Building credibility Internationally
 - Large scale adoption of technology (Biotech, Digital Tech, Mechanization)
- Policy support from Govt
 - Ports, PQ facilities, ISTA accredited Quality Labs, Processes, Export Zones, Seed Export Development Council, Enabling Regulatory policies
 - Coordinated approach between Centre and States
- Seed growing farmer will be benefited through additional profits and prosperity

Thank You