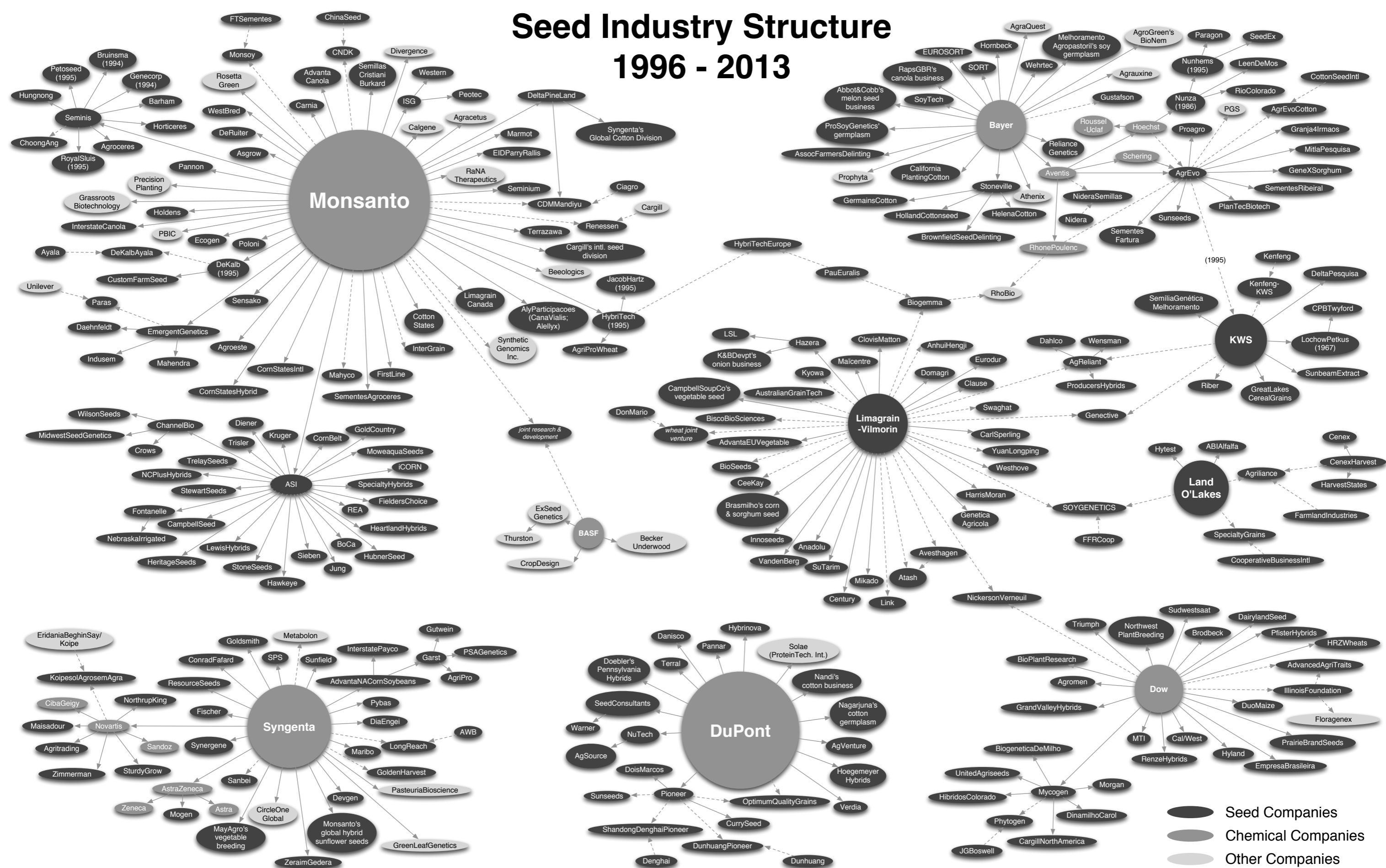


Seed Industry Structure 1996 - 2013



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● Size proportional to global seed market share

● Seed Companies
 ● Chemical Companies
 ● Other Companies
 — Full Ownership
 - - - Partial Ownership