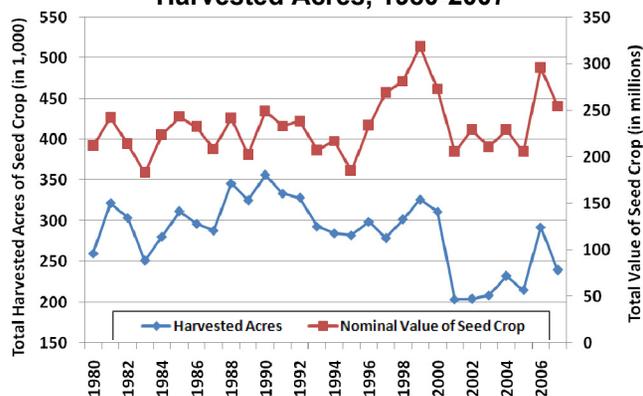


The California Seed Crop: A Historical Perspective

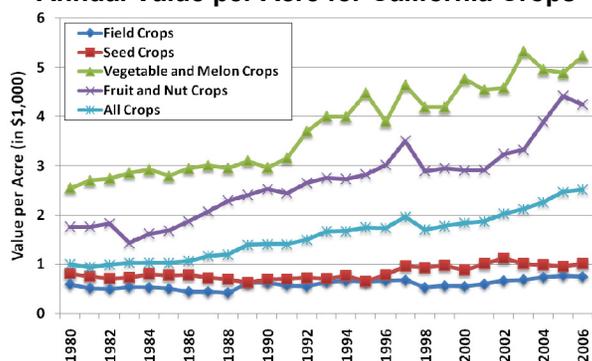
Production of seed crops in California is documented through the state's annual County Agricultural Commissioner reports. Using this data, this report tracked historical information starting in 1980. This information demonstrates the importance of seed production as part of California's agriculture.

California Seed Crop: Annual Value vs. Harvested Acres, 1980-2007



The graph above shows that the value (adjusted for inflation) of California's annual seed crop, as well as the harvested acreage, has changed very little over this time period. However, the value per acre for seed crops has shown a steady, if small, increase, with the value per acre of seed crops averaging 24% higher than the value per acre of field crops.

Annual Value per Acre for California Crops



The complete report of *The California Seed Industry: A Measure of Economic Activity and Contribution*, is available online at:

<http://aic.ucdavis.edu>



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The UC Agricultural Issues Center (aic.ucdavis.edu) is a forum for the identification and analysis of important issues affecting the agricultural sector. AIC provides broadly based, objective information on a range of critical, emerging agricultural issues and their significance for the economy and natural resources through studies, conferences and publications.



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The mission of the Seed Biotechnology Center (sbc.ucdavis.edu) is to mobilize the research, educational and outreach resources of the University of California, in partnership with the seed and plant biotechnology industries, to facilitate discovery and commercialization of new seed technologies for agricultural and consumer benefit.

Funding for this project was provided by the
California Seed Advisory Board

The California Seed Industry: A Measure of Economic Activity & Contribution to California Agriculture



Conducted by the
UC Agricultural Issues Center
and the
Seed Biotechnology Center



Economic Study of the California Seed Industry – Summary of 2008

Overview

A recent study commissioned by the California Seed Advisory Board, *The California Seed Industry: A Measure of Economic Activity and Contribution to California Agriculture*, has been conducted by the Agricultural Issues Center and the Seed Biotechnology Center at the University of California, Davis. Through a two part analysis, 1) a historical investigation of the seed crop production in California and 2) primary data collection from the California seed industry, the role of seed production in the state has been documented. This study demonstrates the important contribution of the seed industry to California agriculture and the economy of the state.

California Seed Industry

California's diverse climate and soils, in combination with sophisticated infrastructure for growing, harvesting, processing and marketing high quality seeds, makes this an ideal area for seed production. Spread throughout the state, the seed industry is a major provider of seeds for specialty crops, and the industry has evolved to fill an important niche in the global seed industry.



California's Seed Industry
is worth an estimated
\$2.9 billion globally

Purpose of Study

Seed production and sales for the U.S. in 2008 accounted for about 2.6% of the \$324.2 billion in total U.S. agricultural production (USDA ERS). This indicates the significance of the seed industry to U.S. agriculture. For this reason, **this study was conducted to document the economic contribution of the California seed industry to agriculture and the overall economy of California.**

Summary of Results

California is a major producer of seed crops. In each of the past three years, the California seed industry has generated more than \$2 billion in gross revenue of seed sales in the global seed market. This represents almost 8% of the global seed market and 13% of the U.S. seed market (Table 1).

**Table 1: 2008 California Seed Industry
Global, U.S. and California seed market value**

	Global Market	U.S. Market	CA Market
	In \$million		
Gross Revenue generated by CA Seed Industry	\$2,887	\$1,106	\$295
Total Market Value	\$36,500 ¹	\$8,500 ¹	\$481 ²
CA Seed Industry Market Share	7.9%	13.0%	61.4%

¹ Global and domestic market values from International Seed Federation.

² California market value from CDFA Seed Services Program.

Results continued

Primary data collected from the industry has allowed for estimates of the gross revenues generated for the California seed industry from the sale of seed produced within the state. Table 2 shows that field crop seed production generates about 50% of the total value of California produced seed sold by the industry over each of the last three years, with vegetable seed being the next highest valued category at about 30%.

**Table 2: Total Gross Revenue Generated
from the Sale of California Produced Seed**

	2006	2007	2008
	Gross Revenues in \$millions		
Vegetable Seed	\$195.8	\$226.7	\$235.3
Field Seed	\$292.8	\$348.0	\$409.9
Turf Seed	\$47.8	\$63.8	\$61.9
Flower Seed	\$59.6	\$53.2	\$44.9

Quick Facts

- The value of the California seed industry to the state in 2008 was *\$481 million*
- *7.9% of the global seed market value comes from California*
- *684 firms* are authorized to sell seed in California
- *205 seed labeling firms* are located in the state (55% of market)
- 36 of 58 California counties have reported seed production in the last 3 decades
- California produced seeds represents *61.4%* of the California seed market value
- About *3% of all crop acreage* is dedicated to seed production in California