



Prospects of Indian Seed Industry

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Accounting for approximately 30% of the national GDP, agriculture is the backbone of Indian economy. It is the source of livelihood for over 70% of its population. Having an arable area of 170 million ha., India ranks second only to USA in sheer size of agriculture. By virtue of its large arable land area, sizeable irrigated area, rich agri-biodiversity, diverse agro climate and well developed research system, the country has all the potential to emerge as a global power in agriculture. Unlike in developed countries, population growth in India is far in excess of its agricultural growth warranting sustained and steady increase in food production. The route to increase production lies through improved agronomic practices especially the use of high quality seed that can contribute to 20% yield. With the heralding of High Yielding Varieties/Hybrids, seed production had seen a steady improvement over the past few decades.

The Indian seed market has witnessed a major restructuring as a result of the implementation of some progressive policies by the government. Enactment of Seed legislation especially Seeds Act, 1966 and Seeds Rules, 1968 and policies viz., Seed Development, 1988 and National Seed Policy, 2002 have helped in strengthening the Indian seed industry in the areas of R&D, product development, supply chain management and quality assurance. The Indian seeds market reached a value of US\$ 3.6 Billion in 2017, exhibiting a compound annual growth rate (CAGR) of around 17% during 2010-2017 and is expected to grow further at a CAGR of 14.3% during 2018-23, reaching a value of more than US\$ 8 Billion by 2023.

Though the current seed production is dominated by government production, private seed companies have also thrived in this competitive market. Both private and public sector companies/corporations are involved with the production of seed. The public sector component comprises two central corporations, viz., National Seed Corporation (NSC) and State Farm Corporation of India (SFCI) and 13 State Seed Corporations. There are about 150 organized seed companies in India today. With enactment of PVPFRA (2007), several companies recognized research and development and have produced and released a large number of varieties and hybrids in several crops. The contribution of private research in terms of value is steadily increasing. India's seed industry has grown in size and level of performance over the past four decades.

The present contribution of OPV in the total bought seed market segment has expanded indicating greater use of purchased seed by farmers. However, diverse regional crop growing habits, language and poor literacy among farmers makes it difficult to sustain a pan Indian seed distribution. Private seed companies concentrate mostly in hybrids and vegetables, leaving out the cheaper option of OPV to public sector which is again subjected to financial strains. Improving the irrigation potential is necessary for farmers to use quality seed which is again to be increased from the current poor irrigation coverage. The need for creation of awareness among farmers and general public on the benefits and risks associated with transgenic crops is also very important. Maintaining the genetic biodiversity among crops, promoting traditional varieties by helping the farmers to maintain quality seed of land races will ensure protection against climate changes are need of the hour.

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