

Current Trends & Issues Affecting Farmers' Rights to Seeds



Farmers' seed systems under threat

- Farmers are the stewards of seed diversity since the dawn of agriculture
 - up to 80% of seeds are supplied by the farmers' seed systems
- The global recognition remains in the articles of treaties and declaration
 - The implementation remains a challenge
 - Issues on access and benefit sharing
 - Digital Sequence Information
- Corporate capture
 - Technological
 - Market
 - Laws and legislations
 - IPR
 - Seed certification & marketing laws
- Alarming rate of PGR diversity loss



Corporate Concentration



1985	\$M	SHARE OF GLOBAL SEED MARKET	1996	\$M	SHARE OF GLOBAL SEED MARKET	2009	\$M	SHARE OF GLOBAL SEED MARKET	2012	\$M	SHARE OF GLOBAL SEED MARKET	
COMPANY	NET SALES		COMPANY	NET SALES		COMPANY	NET SALES		COMPANY	NET SALES		
PIONEER	735	4.1%	PIONEER	1500	5.0%	MONSANTO	7297	17.4%	MONSANTO (USA)	9800	21.8%	
SANDOZ	290	1.6%	NOVARTIS	900	3.0%	DUPONT PIONEER	4700	11.2%	DUPONT PIONEER (USA)	7000	15.5%	
DEKALB	201	1.1%	LIMAGRAIN	650	2.2%	SYNGENTA	2564	6.1%	SYNGENTA (CH)	3200	7.1%	
UPJOHN ASGROW	200	1.1%	ADVANTA	460	1.5%	LIMAGRAIN	1155	2.8%	LIMAGRAIN (FRANCE)	1700	3.8%	
LIMAGRAIN	180	1.0%	SEMINIS	375	1.3%	KWS	920	2.2%	WINFIELD (USA)	1300	3.5%	
SHELL NICKERSON	175	1.0%	TAKII	320	1.1%	BAYER	645	1.5%	KWS (DENMARK)	1300	2.9%	
TAKII	175	1.0%	SAKATA	300	1.0%	DOW	635	1.5%	DOW (USA)	1000	2.9%	
CIBA GEIGY	152	0.8%	KWS	255	0.9%	SAKATA	485	1.2%	BAYER (GERMANY)	0.4	2.2%	
VANDERHAVE	150	0.8%	DEKALB	250	0.8%	LAND O'LAKES	?	?	SAKATA (JAPAN)	0.4	1.0%	
SHARE IN GLOBAL SEED MARKET (GSM)		12.5%			16.7%			> 44%				62%

The leading seed companies are also the leading agrochemical companies

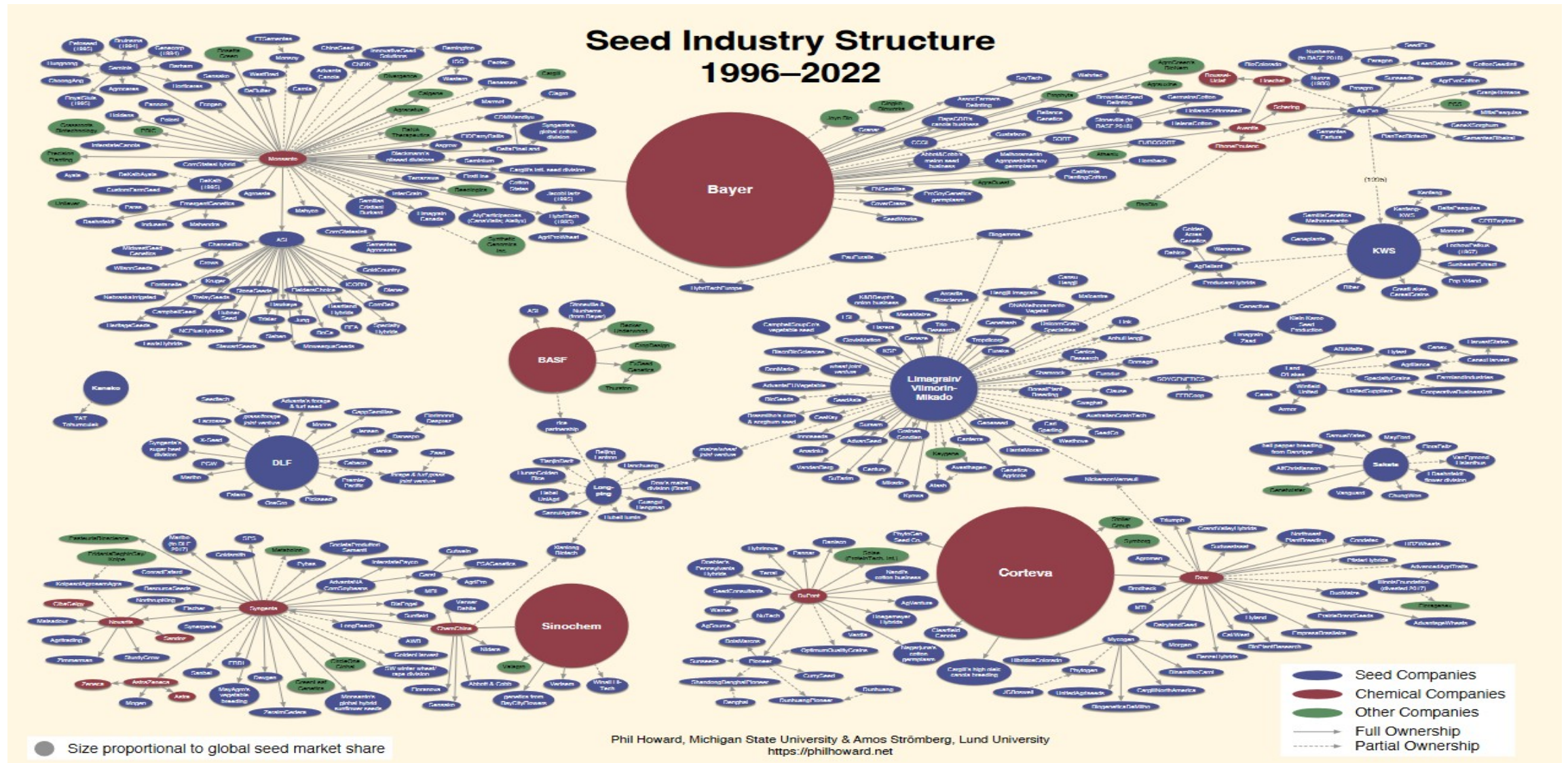


LEADING COMPANIES BY AGROCHEMICAL SALES, 2020



LEADING COMPANIES BY SEEDS & TRAIT SALES, 2020

Transnational companies are continually consolidating the market



Conclusion

Seed development, production, exchange, & sale are part of dynamic farmers' seed system

- This dynamic system is the reason why we still have seed diversity
- To protect such diversity, we need to protect the farmers' seed systems
- Current seed policies imported from developed countries do not fit this dynamic systems
- Policy making must be grounded on realities and recognition of the two distinct seed systems

We need to incorporate rights-based approach in the seed conservation and sustainable use

- Agrochemical corporations, food processing companies, and all other corporations engaged in food production should be guided by the United Nations Guiding Principles on Business and Human Rights.
- Breeders, including farmer breeders need to be provided with incentives that do not restrict farmer's access to seeds
- With all the challenges that farmers are facing now, the only way they can continue sustaining genetic diversity is when their rights are protected and upheld





Salamat po!



“The more a seed system recognizes and supports farmers as stewards of a seed system for all of humankind, the more this system fulfils people’s human rights.”

*Michael Fakhri
UN Special Rapporteur
on the right to food*

Thank you!