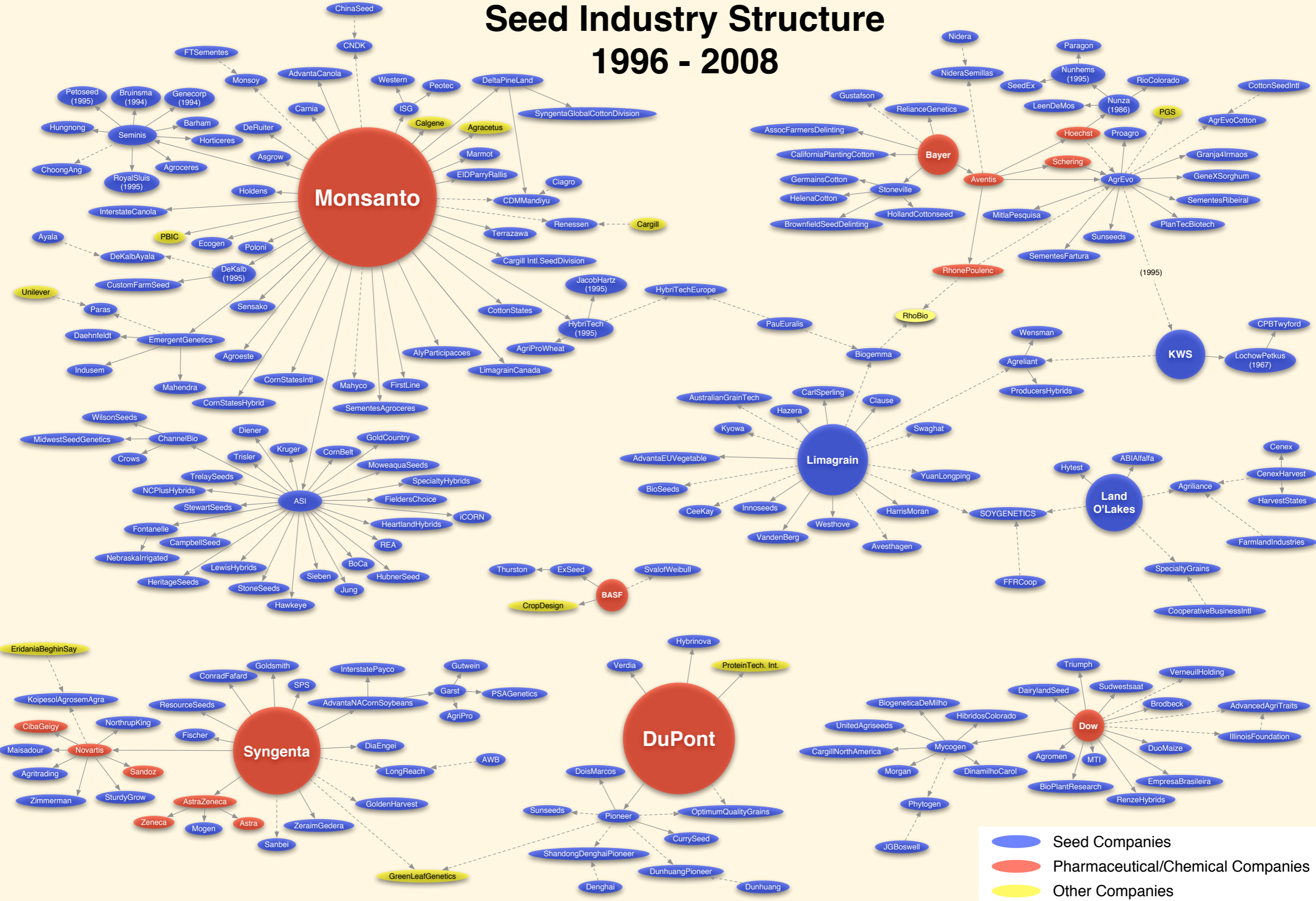


# Seed Industry Structure 1996 - 2008



● Size proportional to global seed market share

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