



Seed Industry in *Hyderabad* - *Highlights*

- Globally recognised as “**Seed Capital of India**” .
- Major Seed Companies “**Head Quarters**” are located.
- Total Seed Companies are **364 in SMA** (Small 75% , Medium 15 % and Large 10 %) and **members are from 6 states**
- **Supplies (Processed & Packed) “60%”** of Seed Requirement in India.
- Seed **Warehouse** Capacity is **45 lacs sft**
- **Cold Storage** space is **1.3 Crore cft** .
- Seed Processing Capacity is **650 Metric Ton / hr**, which is highest in the world at one place.
- **1.2 lac Mt Maize Cob** drying facilities.
- **Raw seed arrival** for processing & packing from **5 states**
- Around “**17000 employees**” Regular & Outsourced.
- More than **1 lakh** Seasonal Skilled workers.
- Exports to more than 20 Countries.



Why Hyderabad is “Called Seed Capital” of India?

- Telangana is **No 1 State** in India where highest **Seed Research investment around 380 Crores / year** is made by Private Sector.
- **Asia’s biggest** Private Sector Multi Field Crops Seed Research Centre (MCRC) has come up recently and it is located in **Gajwel**, Medak District.
- Most suitable Climate for crops research – **2 Crop cycles per year can be taken**
- Because of its **Dry Climate**, Seed Can be stored for a **longer period**.
- Major Seed Production Areas are within <200 Kms range
- **Seed production** farmers are very skilled and **produce the finest seed quality** in India.
- All the Major Field Crop Research Institutes like **Crop Directorates (DOR, DRR, IIMR), ICRISAT, CCMB, NBPGR are based at Hyderabad**
- **Top notch agri professionals training institutes ISB, NAARM** and **MANAGE** are located here.
- **Skilled Work Force** is available.
- Excellent **Logistics Services Centre**, seed can reach any part of country with in a week.

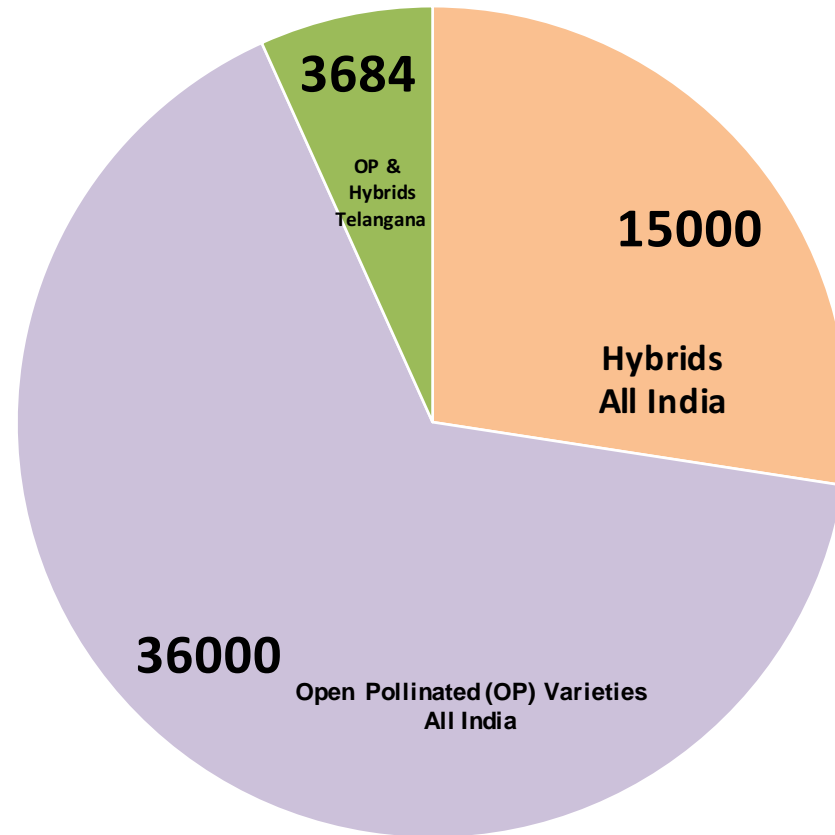


Tunkikalsa Village, Wargal, Gajwel





SALES



In Crores

■ Hybrids India ■ OP India ■ Telangana OP & Hybrids



Exports

Value in Crores

India

427

All Seeds

Hyd

345

**Vegetables, Rice,
Sorghum, Millet.**



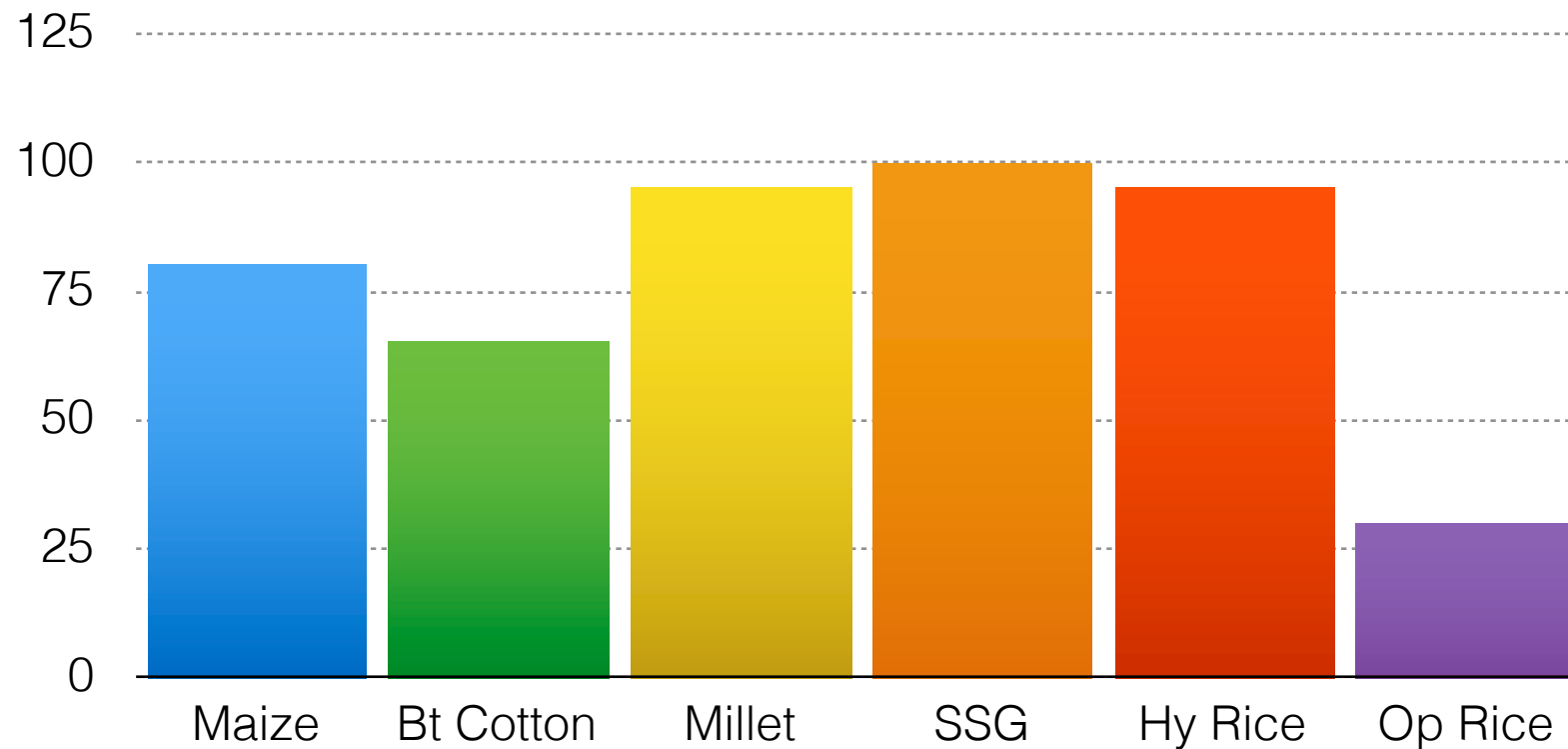
Crop Wise Seed Supply to All India From Telangana Seed Production

1. SSG is 100 %
2. Millet is 70%
3. Hybrid Rice is 90%
4. OP Rice is 35%
5. Maize is 30%
6. Bt Cotton is 27%



Seed Supplies from Hyderabad to All India

5 Crops supply 60%
(Processed & Packed)



Around 25-30% Hybrid Seeds of Maize, Millet & Bt Cotton Seeds will come from other States and 100% Hybrid Vegetable Seeds from other states



Why Seed Production is attractive for Farmers ?

1. Companies will buy back the Produce
2. Farm Income / kg is more than the Govt MSP
 - a. Hybrid Rice > 5 Times
 - b. Bajra > 2 Times
 - c. Maize > 3 Times



Hybrid Seed Production Details- Field Crops Telangana State



MAP NOT TO SCALE

Crops	Total	Existing	% of Total
Crops		5	
Mandals	443	107	24.15
Villages	10761	1435	13.35
Acres		2,59,900	
Farmers		1,91,697	
Qty.in Mt		1,91,300	
Payment in Crores		1361.26 Cr	



Hybrid Seed Production Details- Vegetables OP Telangana State



MAP NOT TO SCALE

Crops	Total	Existing	% of Total
Crops		7	
Mandals	167	5	3
Villages	4316	42	1
Acres		22500	
Farmers		56250	
Qty.in Mt		12420	
Payment in Crores		128.7	

7 Crops: Ridge Gourd, Cluster Beans, French Beans, Bhendi, Tinda, Chilli, Tomato & Cow Pea
3 Main Districts: Mahbubnagar, Warangal & Adilabad



Hybrid Seed Production Details - Nizamabad District



Crops	No of Mandals	No of Villages	No of Acres	No of farmers	Total Qty (MT)	Total Payments (In Cr)
SSG (Red)	5	62	32000	16000	38400	77
SSG (White)	3	16	8000	4000	8000	18.5
Millet	8	44	30000	15000	24000	84
Mustard	2	19	5300	4800	3000	16.5
Corn	2	4	800	533	1040	2.64
Total	20	145	76100	40333	74440	198.64



Hybrid Seed Production Details - Adilabad District



Crops	No of Mandals	No of Villages	No of Acres	No of farmers	Total Qty (MT)	Total Payments (In Cr)
SSG (Red)	2	17	8000	4000	9600	19.2
SSG (White)	2	8	2000	1000	2000	4
Millet	4	19	5000	2500	4000	14
Rice	2	15	2300	1533	1150	98
Total	10	59	17300	9033	16750	132.2



Hybrid Seed Production Details - **Karimnagar District**



Crops	No of Mandals	No of Villages	No of Acres	No of farmers	Total Qty (MT)	Total Payments (In Cr)
Corn	5	70	9500	6333	12350	40.7
Rice	27	531	38000	25333	19760	167
Total	32	601	47500	31666	32110	207.7



Hybrid Seed Production Details – Warangal District



Crops	No of Mandals	No of Villages	No of Acres	No of farmers	Total Qty (MT)	Total Payments (In Cr)
Corn	2	14	2800	1533	3640	9.24
Rice	5	42	42000	28000	21840	185
Total	7	56	44800	29533	25490	194.24



Hybrid Seed Production Details – Khammam District



Crops	No of Mandals	No of Villages	No of Acres	No of farmers	Total Qty (MT)	Total Payments (In Cr)
Corn	3	110	11000	7333	14300	36.3
Rice	2	32	14000	9333	7000	59.5
Total	5	142	25000	16666	21300	95.8



Hybrid Seed Production Details – Mahabubnagar District



Crops	No of Mandals	No of Villages	No of Acres	No of farmers	Total Qty (MT)	Total Payments (In Cr)
Cotton	22	360	38000	58000	10450	496
SSG (Red)	6	37	6000	3000	7200	14.4
Total	28	397	44000	61000	17650	510.4



Hybrid Seed Production Details – Medak District



Crops	No of Mandals	No of Villages	No of Acres	No of farmers	Total Qty (MT)	Total Payments (In Cr)
Rice	2	17	2200	1466	1100	9.35
Corn	2	9	1200	800	1560	5.28
Total	4	26	3400	2266	2660	14.63



Hybrid Seed Production Details – Nalgonda District



Crops	No of Mandals	No of Villages	No of Acres	No of farmers	Total Qty (MT)	Total Payments (In Cr)
Rice	1	9	1800	1200	900	7.65
Total	1	9	1800	1200	900	7.65



How we can improve Seed farmers income and Options?

Focus:

- **Vegetables : Seed Nurseries & Seeds:** Huge Domestic and Export Potential: Hyderabad , RR District, Medak and Mahbubnagar Districts. Current all India Exports are 427 Crores
- **Flowers and Seeds:** Huge Domestic Consumptions. RR District , Medak District and parts of MahbubNagar District. Current all India Exports are 460 Crores.
- **Medicinal Plants and Seeds:** Huge Domestic consumptions, since Hyderabad is Pharma Industry Capital: Adilabad District & parts of MahbubNagar, Khammam and Warangal Districts.
- **Pulses:** Huge Export Potential and Domestic. **Tandoor Mandal.** Current Exports are 1209 Crores.
- **Farmers Seed Co-Operatives like Ankapur and Mulkanoor Co-Operatives.** Link these Societies to Directly Buyers from India and Other Countries.



How we can Consolidate existing set up?

- Designate **Seed Production Zones** based on Crop wise performance.
 - **Rice Zone**: Karimnagar, Warangal, Khammam & Nalgonda Districts.
 - **Millet Zone**: Nizamabad and Adilabad Districts.
 - **Cotton Zone**: MahbubNagar Distrcit.
- Create **Seed Export Production Zones** to attract exports to other Countries.
- **Seed SEZ**'s should be developed with required infrastructure in Karimnagar, Nizamabad & Mahbubnagar & Medak Districts .
- **Quantity** and **Quality** incentives to Farmers. Govt can think for giving **Seed Production Card** for Farmers and link it to all incentives.
- **Need** to Encourage **Public and Private Partnerships** in areas of mutual interest projects and also establish **ISTA Lab** and issue of **Phyto Certificate** at Agri University Campus.
- Establish Independent **Seed Science & Technology Department with Masters and Ph.D Courses** in the University and have collaborations with all International Institutes and Seed Departments.



Concerns

1. Frequent Vigilance Raids during peak season.
2. Delay in Seed Licences and R&D Inspections.
3. Delay in Subsidy payments .
4. Co-Marketing.
5. Utilizing the Central Seed Production Schemes.
6. Moving Seed production & Infrastructure of some crops to other states.
7. Labour Issues



Support Required

- **Industry**
- 40 % Subsidy for Seed Warehouses.
- 50% Subsidy on Cold Storages.
- 40% Subsidy on Electricity Charges from February to June for Seed Processing Plants .
- **Farmers**
- Central / State Seed Subsidy for Seed Production.
- 90% Subsidy on Solar Pumps.
- Subsidy on Nursery Structures.



Corporate Social Responsibility by Seed Companies

- **Adopting Rural Schools in Seed Production Areas.**
- **Construction of Water Tanks in the Villages.**
- **Health Camps.**
- **Scholarships for Children of Seed Production Farmers for Professional Education.**



Thank you very much