

RICE SEED MARKET CONCENTRATION IN BRAZIL

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This contribution³ aims to analyze the structure and concentration of the rice seed market in Brazil. As market segments we considered conventional, hybrid, CL (Clearfield®), and CL hybrid varieties. Therefore, the market share and the Herfindahl-Hirschman Index (HHI) were recalculated for the potential market of registered rice varieties from January 01, 1998 until July 05, 2012 and real market (rice varieties adopted by farmers). There are national and international companies on the Brazilian rice seed market. Among the national companies, there are public and private companies. In total, 254 rice varieties registered in Brazil by July 05, 2012. Considering that some varieties were developed by more than one company, there are 309 company contributions to rice variety generation in Brazil from January 01, 1998 until July 05, 2012. Considering only the 254 rice varieties, 194 (76.38%) belong to public organizations, 55 (21.65%) are of private companies and five (1.97%) were developed by public-private partnerships. In the potential market, there is no concentration for the conventional and hybrid seeds intended for the conventional production system (HHI = 68) and a high concentration in this segment of CL hybrid seeds (HHI = 2,500). In the real market, there is a high concentration in the market of upland rice seeds (HHI = 3,608), even though the HHI is linearly shrinking over time. There was no market concentration for rice seeds in the irrigated cropping system (HHI = 331). Since the CL technology is present in this cropping system, there is a higher presence of the private sector.

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