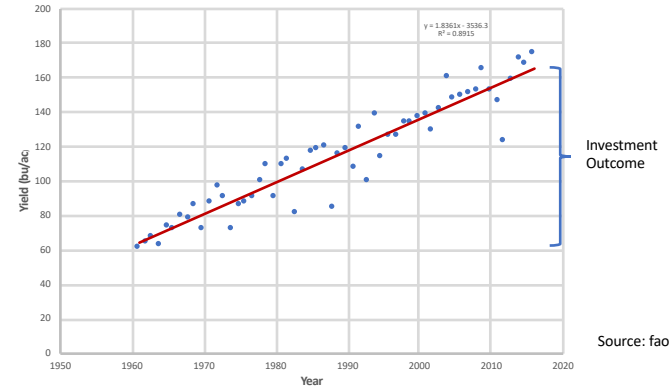


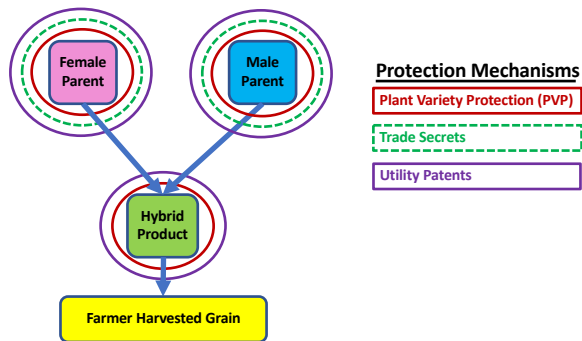
Selling Seed In China: A Retrospective

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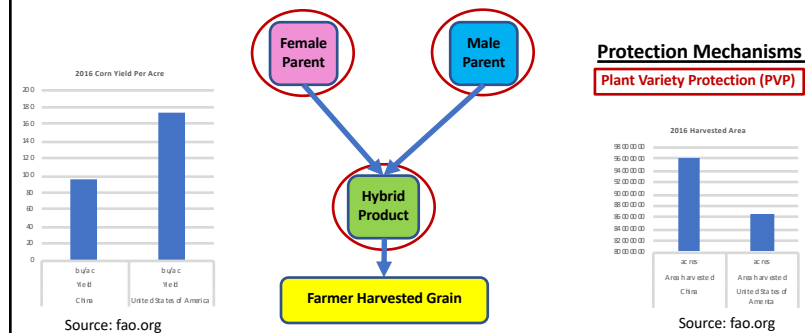
U.S. Corn Per Acre Yields



Options to Protect Parent Lines and Hybrids in The U.S.



Options to Protect Parent Lines and Hybrids in China



Impact on the Seed Industry in China

- Legitimate seed companies suffer from IP loss by illegal acquisition of parental lines.
- “Counterfeit” and “look-alike” products pressure legitimate seed companies on cost/value in the market.
- Enforcement of infringement is local, selective, and small in scale relative to the larger scale problem.
- A logistical challenge without strong central policy and attention to the legitimacy of the over all seed market.

Our Approach In China

- Utilize the Plant Variety Protection System.
- Conduct routine surveillance of competitor products.
- Establish local breeding capability in China using Chinese regulations and IP environment.
- Engage China Ministry of Agriculture and other agencies directly and through seed industry organizations.
- Work to improve policy and perspective on the China seed market, other industry IP have improved based on this approach.