

THE IMPACT OF HT CROPS ON THE GLOBAL CROP PROTECTION INDUSTRY

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Abstract Herbicide – tolerant (HT) crops have changed agriculture drastically. Today, US and Argentinean soybean production are dominated by Roundup Ready varieties. Outside soybeans, other HT technologies play a role also. More than 95% of the Canadian canola market are driven by three HT systems. In some crops, weed control without modified crops has been reduced to a minimum amount. In a few major crops however, HT – systems have not gained a high proportion yet: cereals, rice, plantation crops, corn. Political, agronomy issues and the lack of value capture systems for agrochemical companies are the reasons for this fact. Agrochemical companies have changed their structures and their objectives according to the growing importance of the seed business. The turnover of some companies, e.g. Monsanto and DuPont is primarily based on new traits today. As a consequence, the investment in herbicide research has been reduced drastically. The number of new molecules entering the market has decreased accordingly. This presentation summarizes the background of HT crops and demonstrates how the change of our industry will affect agriculture in the future.