

BENORI



CASE STUDY

Understanding the Controlled Environment Agriculture Seeds Market



OBJECTIVE AND SCOPE

- The client, a Europe-based venture capital firm, wanted to explore sustainable agriculture options by assessing the potential of the Controlled Environment Agriculture (CEA) Genetics Seeds segment. It also wanted to conduct due diligence on the relevant firm before investment, and sought Benori's support to:
- Analyze CEA Seeds market trends, drivers, opportunities, challenges, size, and comparison to outdoor seeds
- Benchmark the target firm vs. top players based on value chain, crop portfolio, pricing, patents, market share, and revenue





APPROACH

We conducted extensive secondary research to understand the CEA seeds market to understand the major trends, drivers, market size, major crops and top players. We also conducted primary research, interviewing industry experts to understand the value chain, value proposition, partnerships, price ranges and other details, along with insights on market dynamics for all identified key players.



METHODOLOGY



**Secondary
Research**



**Primary
Research**



**Data
Modelling**





IMPACT

The detailed insights helped the client in:

- Gaining insights into the market potential and opportunities in the CEA seeds segment, supporting their focus on sustainable agriculture
- Understanding the strengths and weakness of its target company in comparison to other top players in the market which aided them in making informed investment decisions

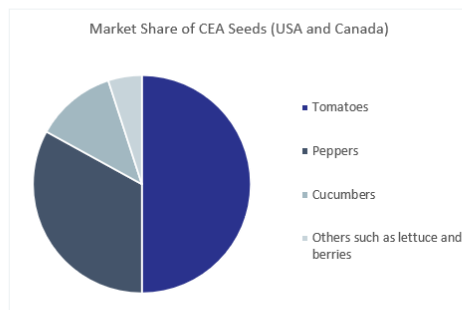


SAMPLE OUTPUT

Market Overview

Tomatoes and peppers collectively constitute over xx% of the CEA seeds market

The USA vegetable market is mostly import-oriented and get their vegetables from Canada during the summers and from Mexico during the winters

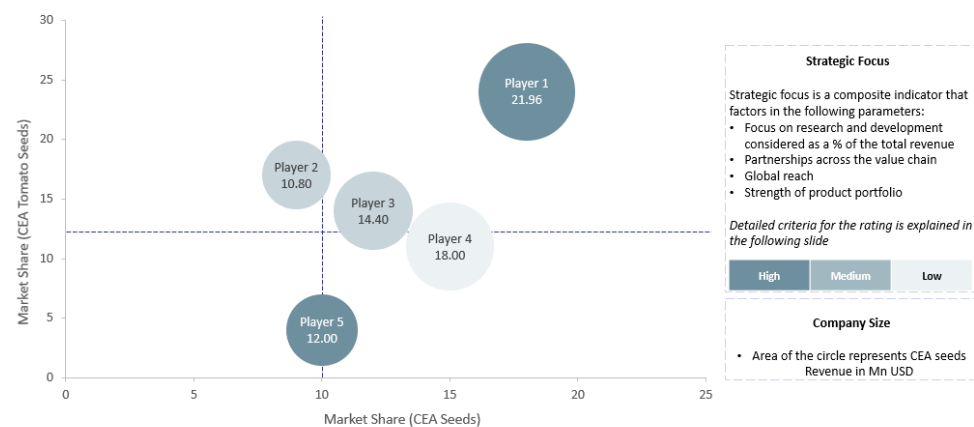


- The cucumber is anticipated to grow the fastest in the coming years followed by tomatoes and peppers
- In the pepper segment, sweet pepper will be the slowest-growing category

Competitive Assessment

Comparative assessment of players based on their market share and strategic focus

Player 2 holds the second highest position in the tomato segment



Strategic Focus

Strategic focus is a composite indicator that factors in the following parameters:

- Focus on research and development considered as a % of the total revenue
- Partnerships across the value chain
- Global reach
- Strength of product portfolio

Detailed criteria for the rating is explained in the following slide

High Medium Low

Company Size

- Area of the circle represents CEA seeds Revenue in Mn USD

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