



# CIAT *Urochloa* hybrid seed sales and adoption: 2021 data and global developments

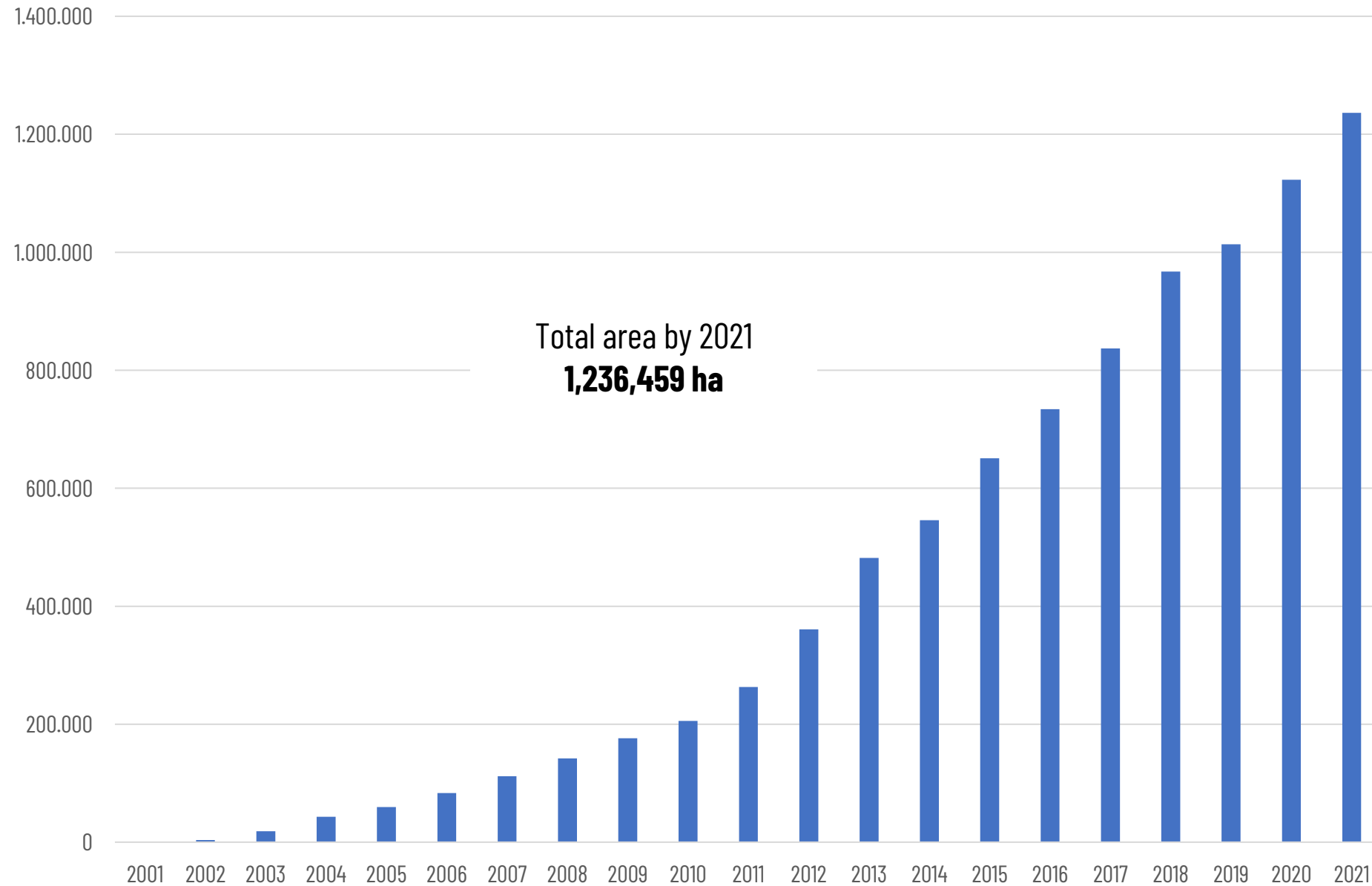
**Burkart, Stefan**

November 1, 2022

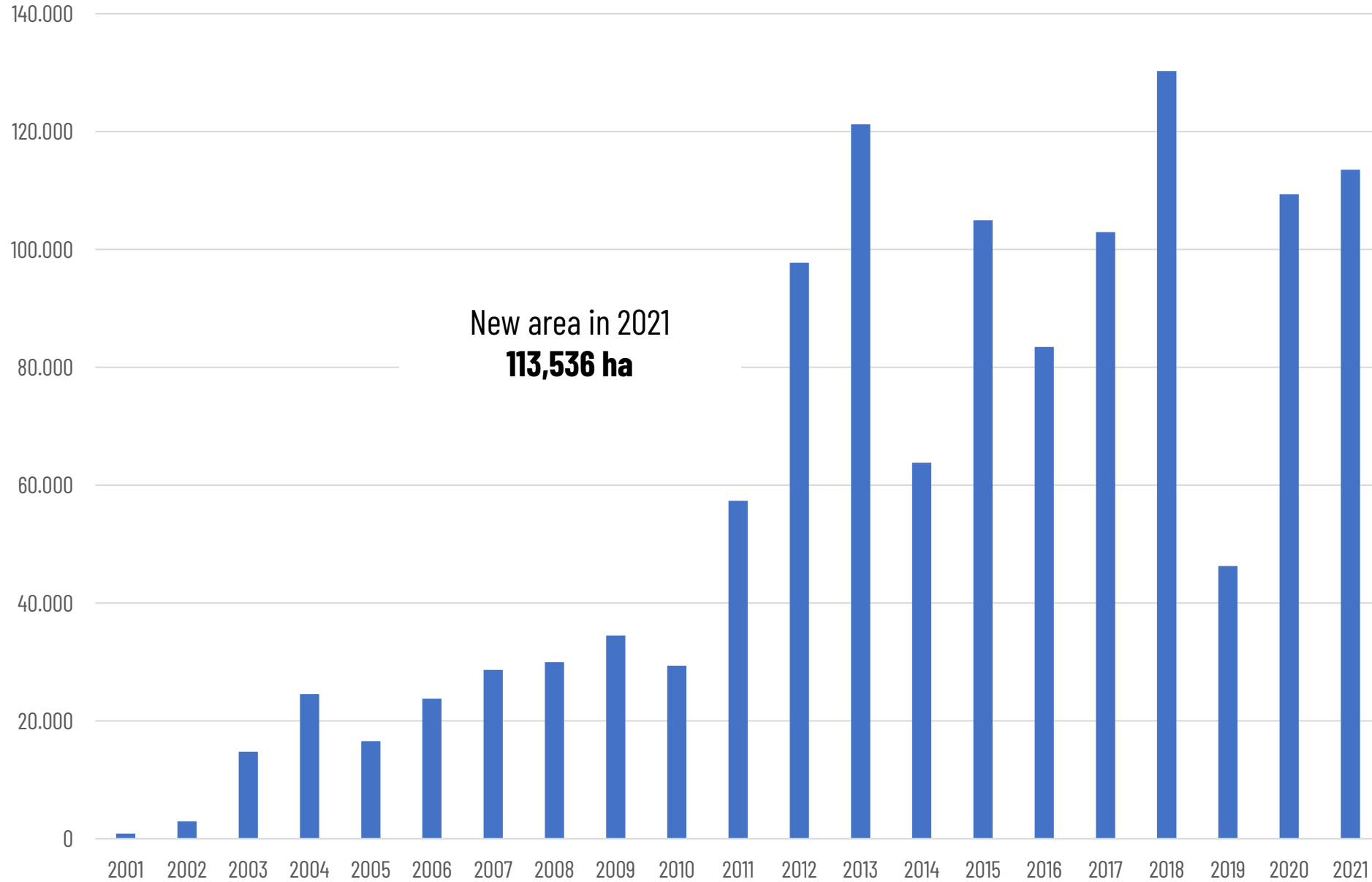


**Global development of  
*Urochloa* hybrid adoption**

## CIAT *Urochloa* hybrid global adoption (cumulative, in ha)

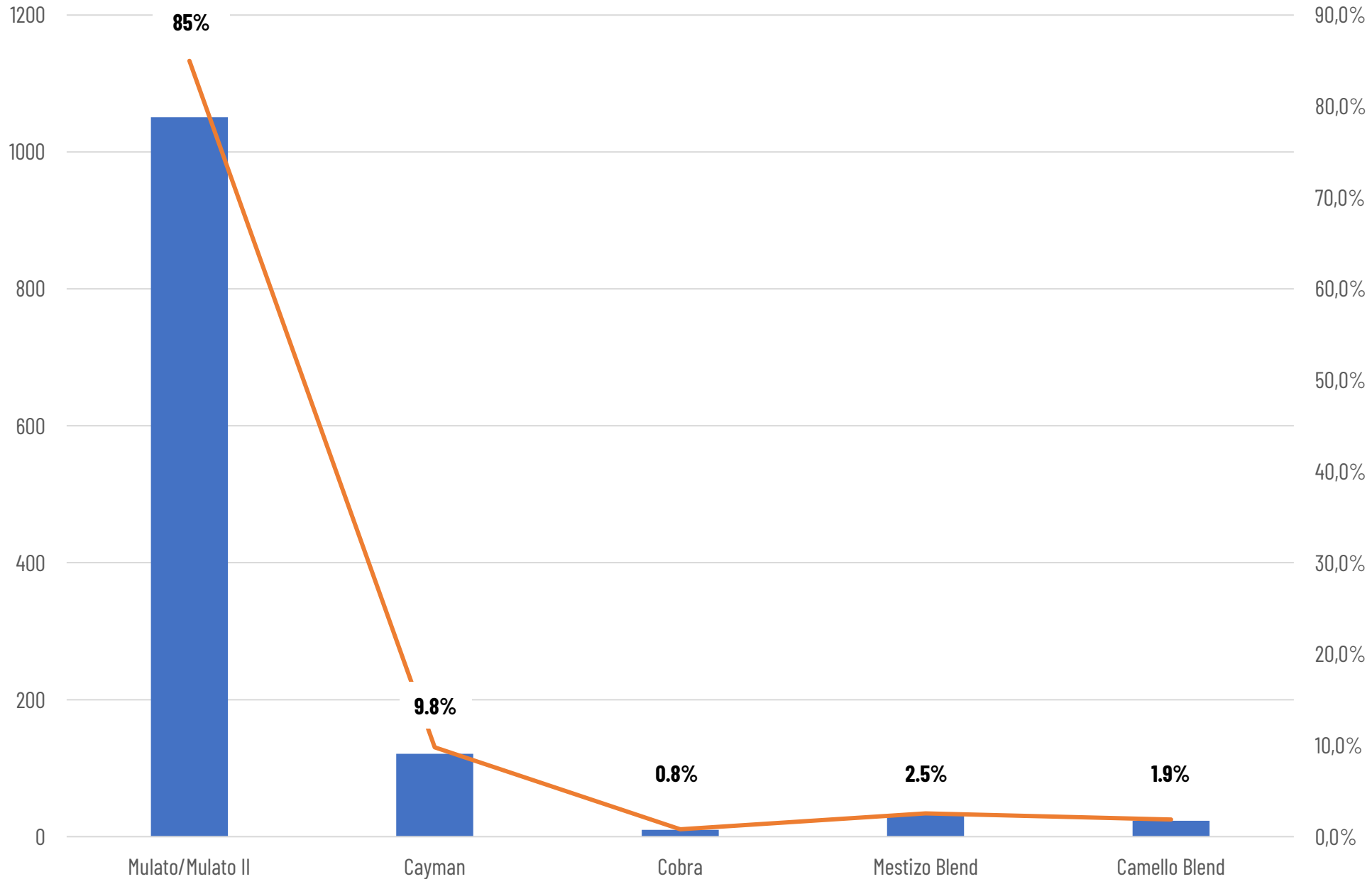


## CIAT *Urochloa* hybrids global annual adoption (in ha)

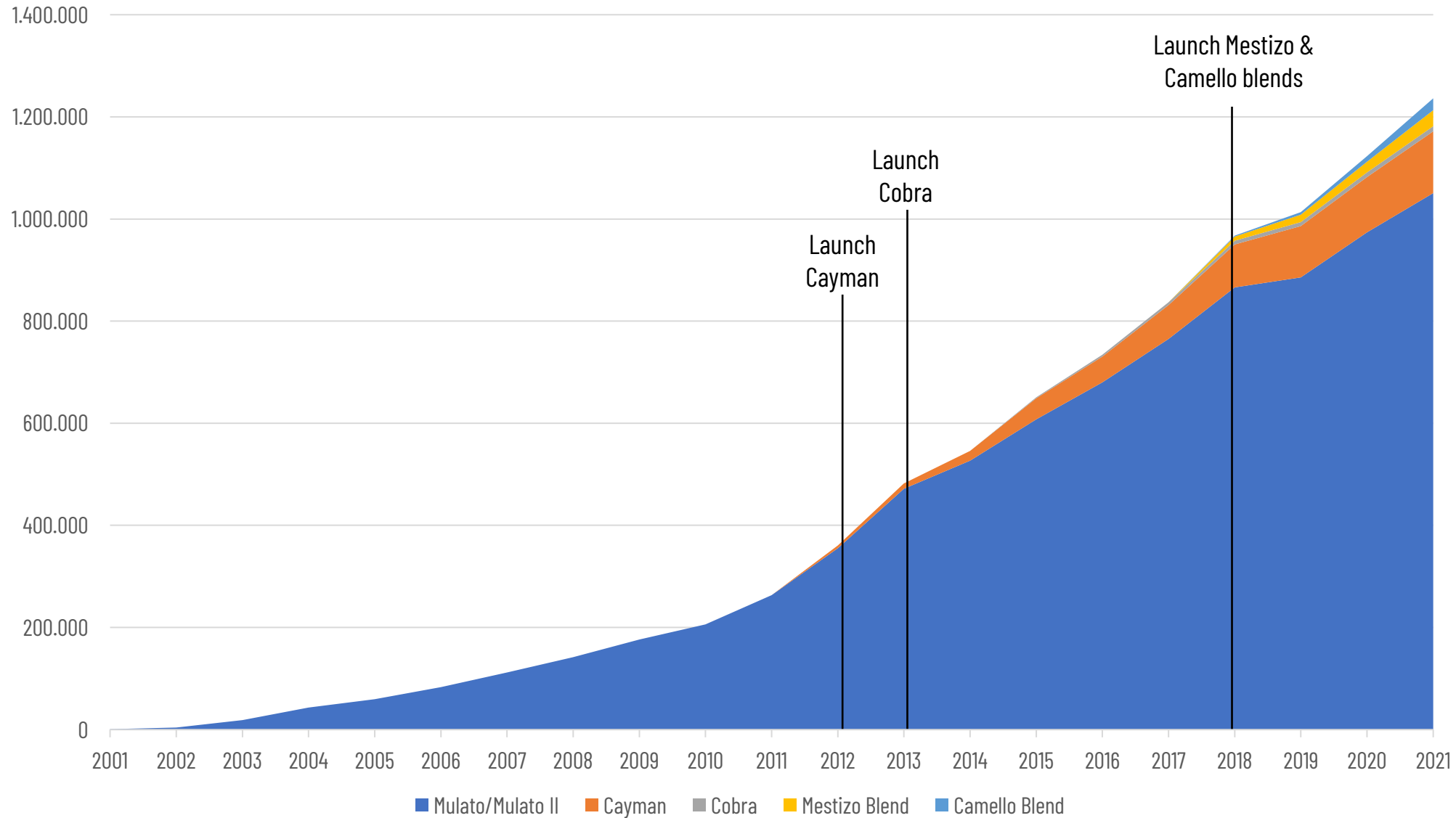


New area in 2021  
**113,536 ha**

## CIAT *Urochloa* hybrid global adoption (1000 ha; %)



## CIAT *Urochloa* hybrids - annual growth in adoption (in ha)



# Key messages

- Since the inception of the first CIAT *Urochloa* hybrid in 2001, adoption has reached >1.2 million hectares globally. This is based on seed sales data and an estimated average sowing rate of 7kg/ha.
- Seed sales figures show that adoption has been stable in 2020 and 2021 – despite the COVID-19 pandemic.
- 2019 was a difficult year in terms of hybrid adoption, since seed sales dropped significantly as a result of storage-related seed shortages.
- *Urochloa* hybrid cv. Mulato II is still the most prominent hybrid on the market. Nevertheless, *Urochloa* hybrid cv. Cayman is gaining in importance. Yet minor importance have the more recently introduced hybrids Cobra, Mestizo blend, and Camello blend.

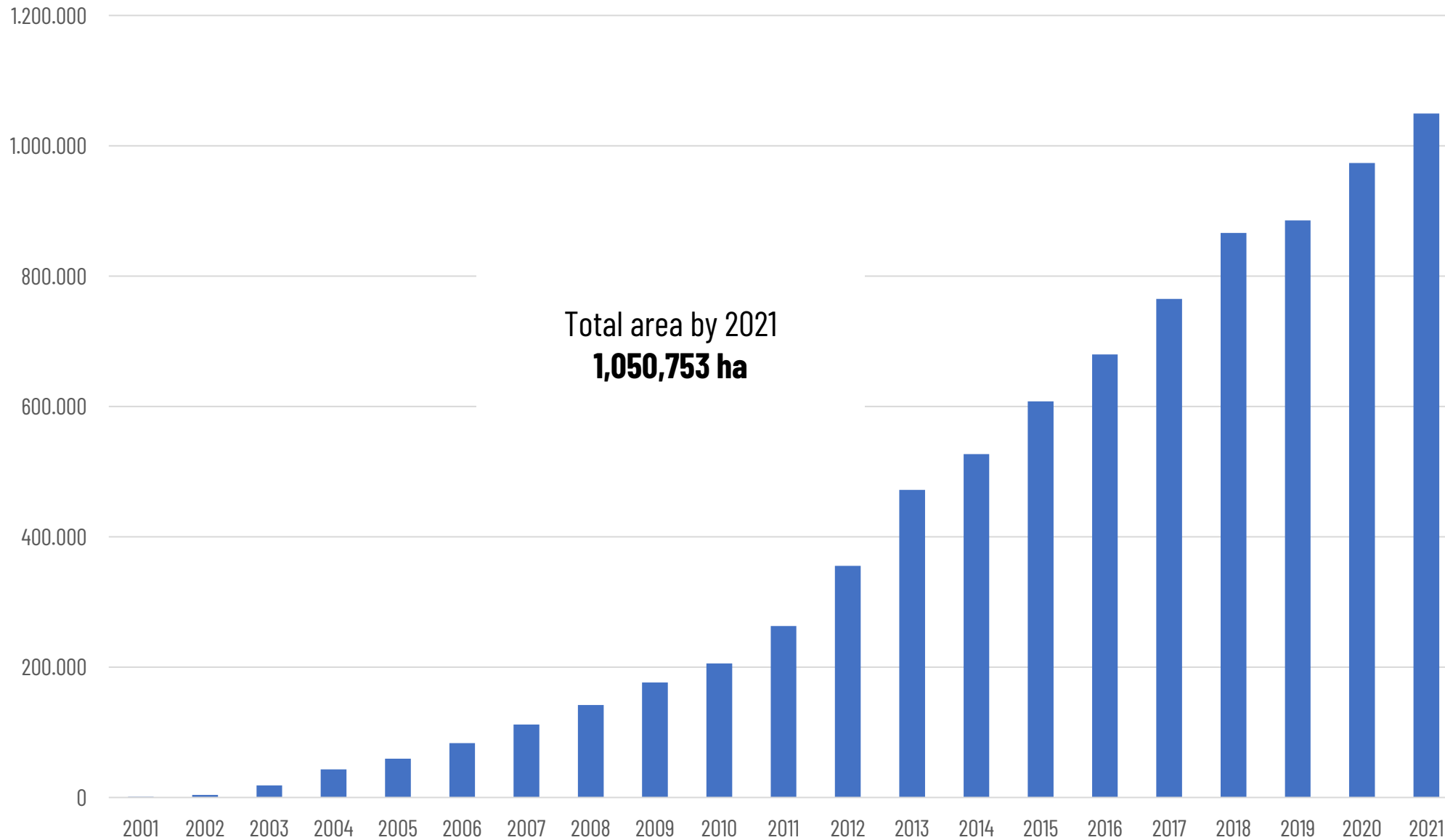
# Development by *Urochloa* hybrid

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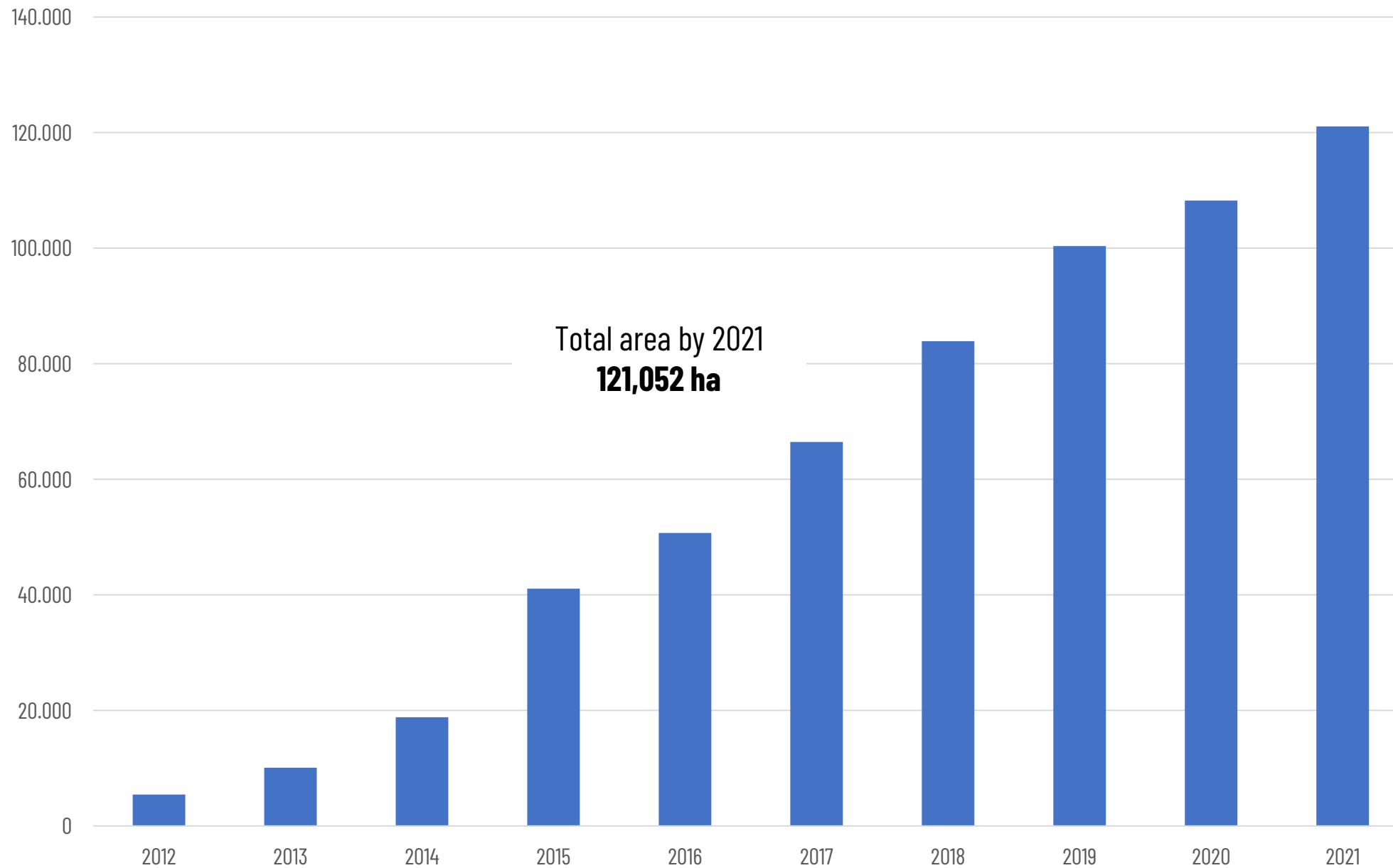




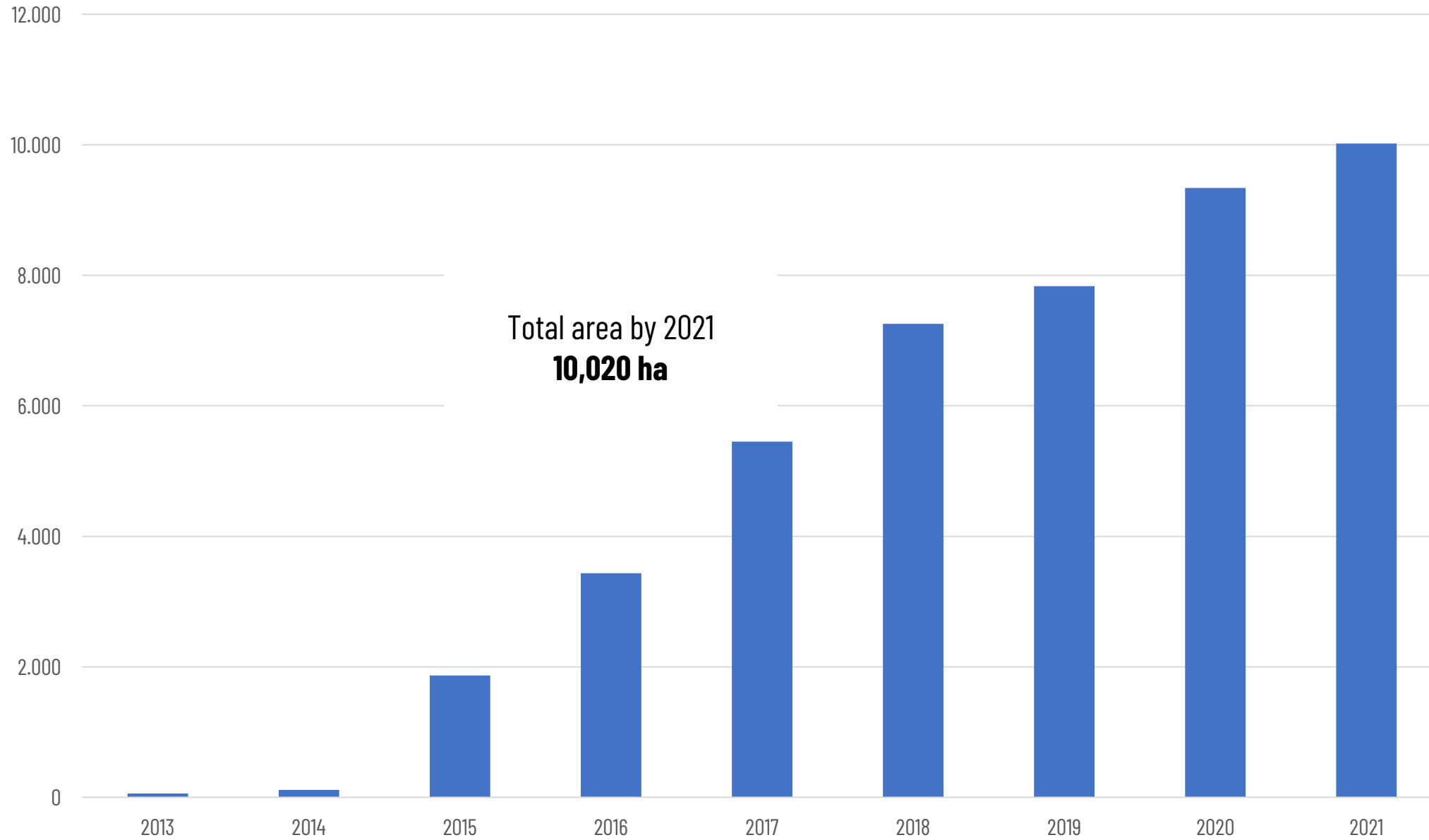
## *Urochloa* hybrid cv. Mulato/Mulato II global adoption (cumulative, in ha)



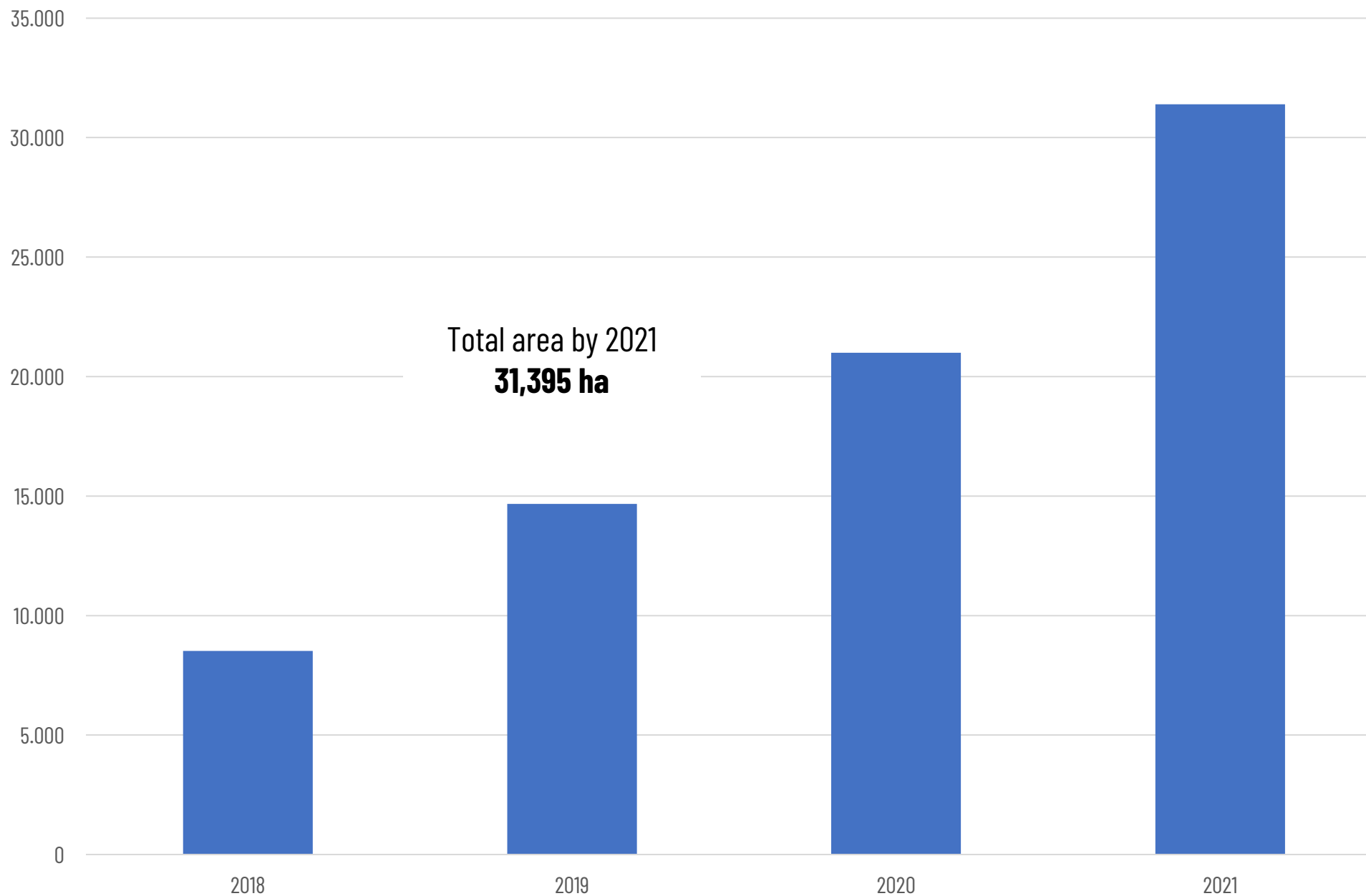
## Urochloa hybrid cv. Cayman global adoption (cumulative, in ha)



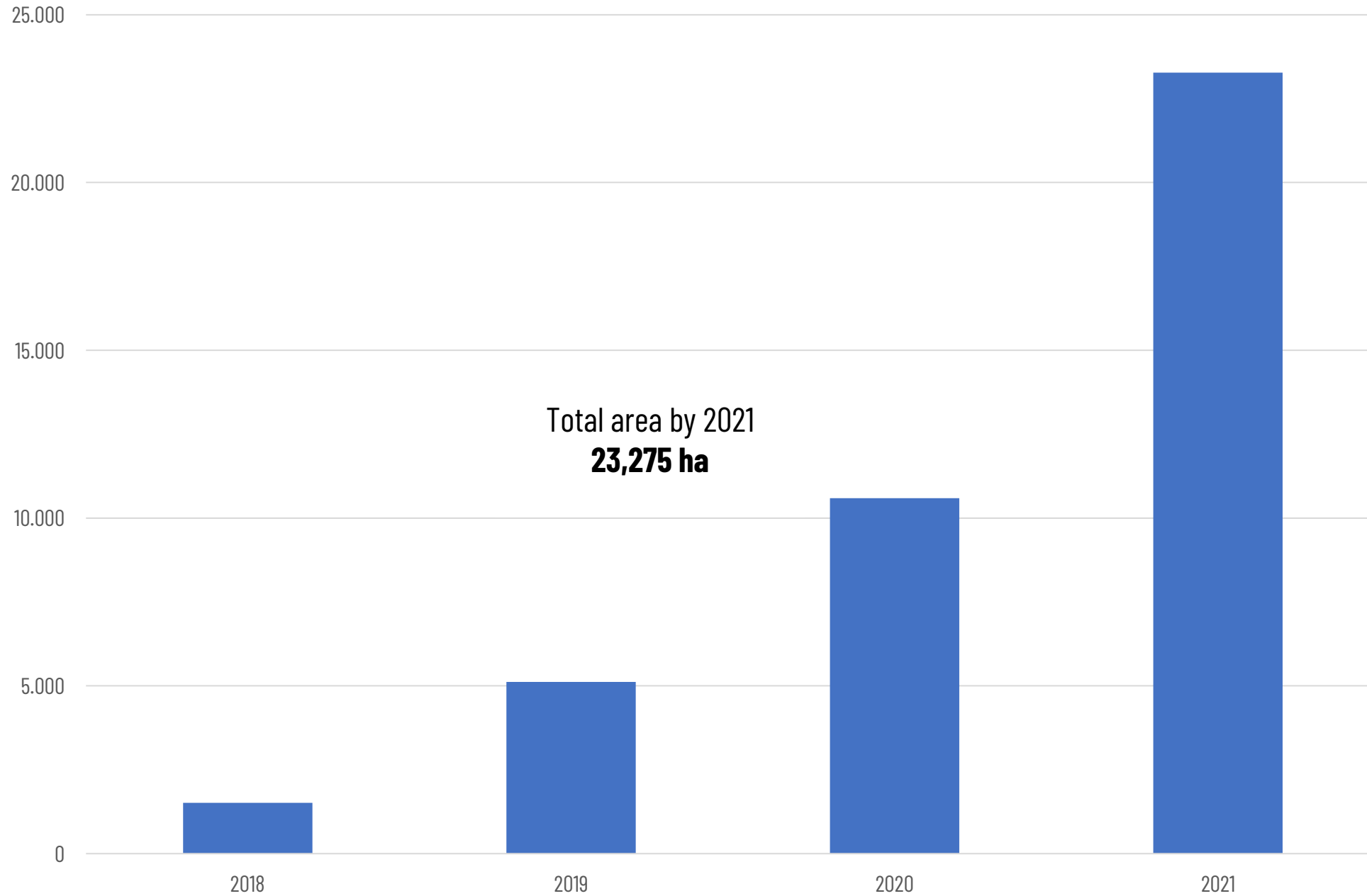
## Urochloa hybrid cv. Cobra global adoption (cumulative, in ha)



## *Urochloa* hybrid cv. Mestizo blend global adoption (cumulative, in ha)



## *Urochloa* hybrid cv. Camello blend global adoption (cumulative, in ha)



# Key messages

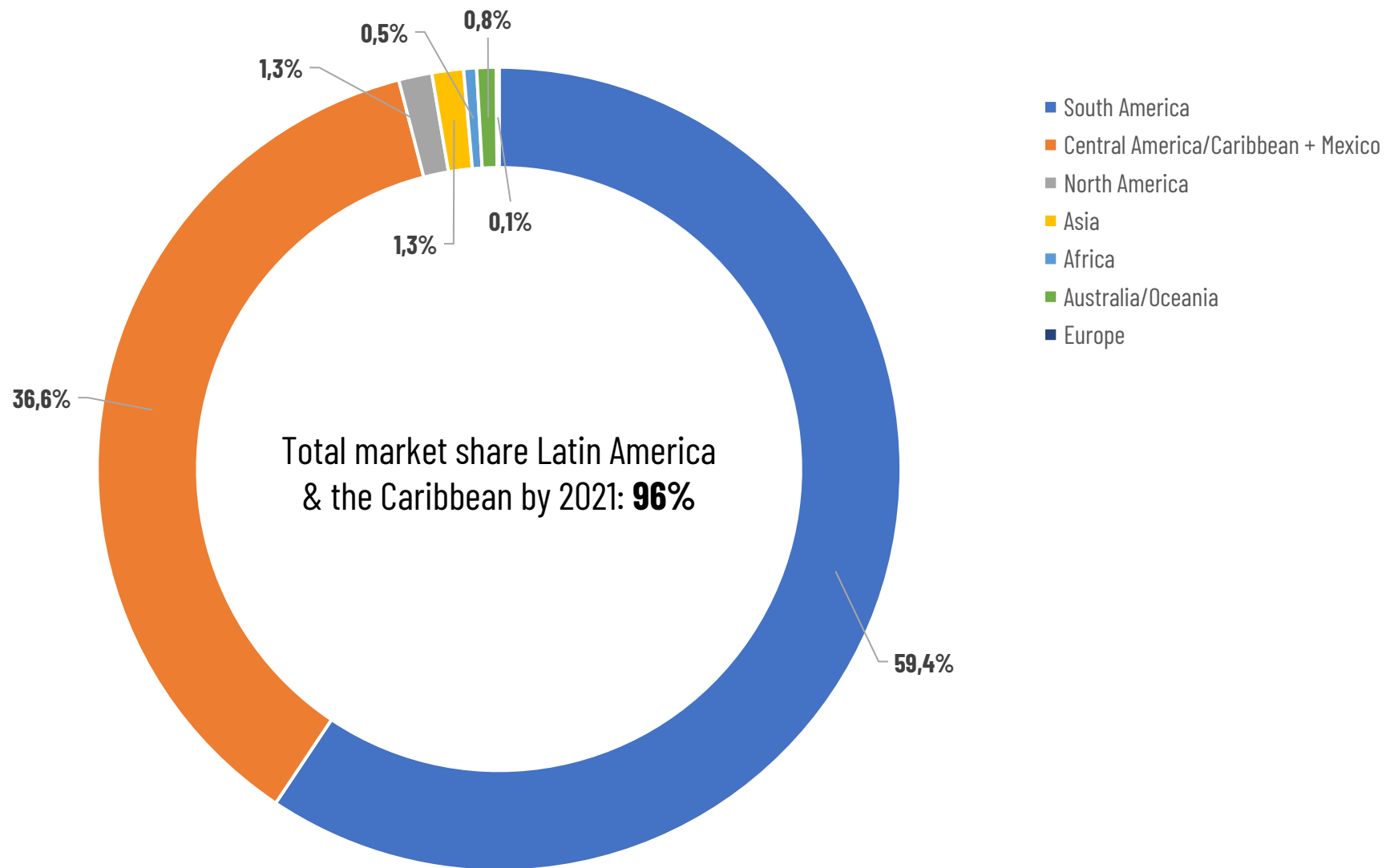
- *Urochloa* hybrid cv. **Mulato II** has not yet reached market saturation despite being on the market for two decades. Adoption is still increasing year by year.
- *Urochloa* hybrid cv. **Cayman** is increasingly gaining importance and already has a significant market share, despite a relatively short presence on the market (10 years).
- *Urochloa* hybrid cv. **Cobra** has a much lower adoption, despite being on the market for only one year less than Cayman.
- The two blends *Urochloa* hybrid cv. **Mestizo blend** and *Urochloa* hybrid cv. **Camello blend** have quickly importance although they were released only four years ago.

# ***Urochloa* hybrid adoption per region**

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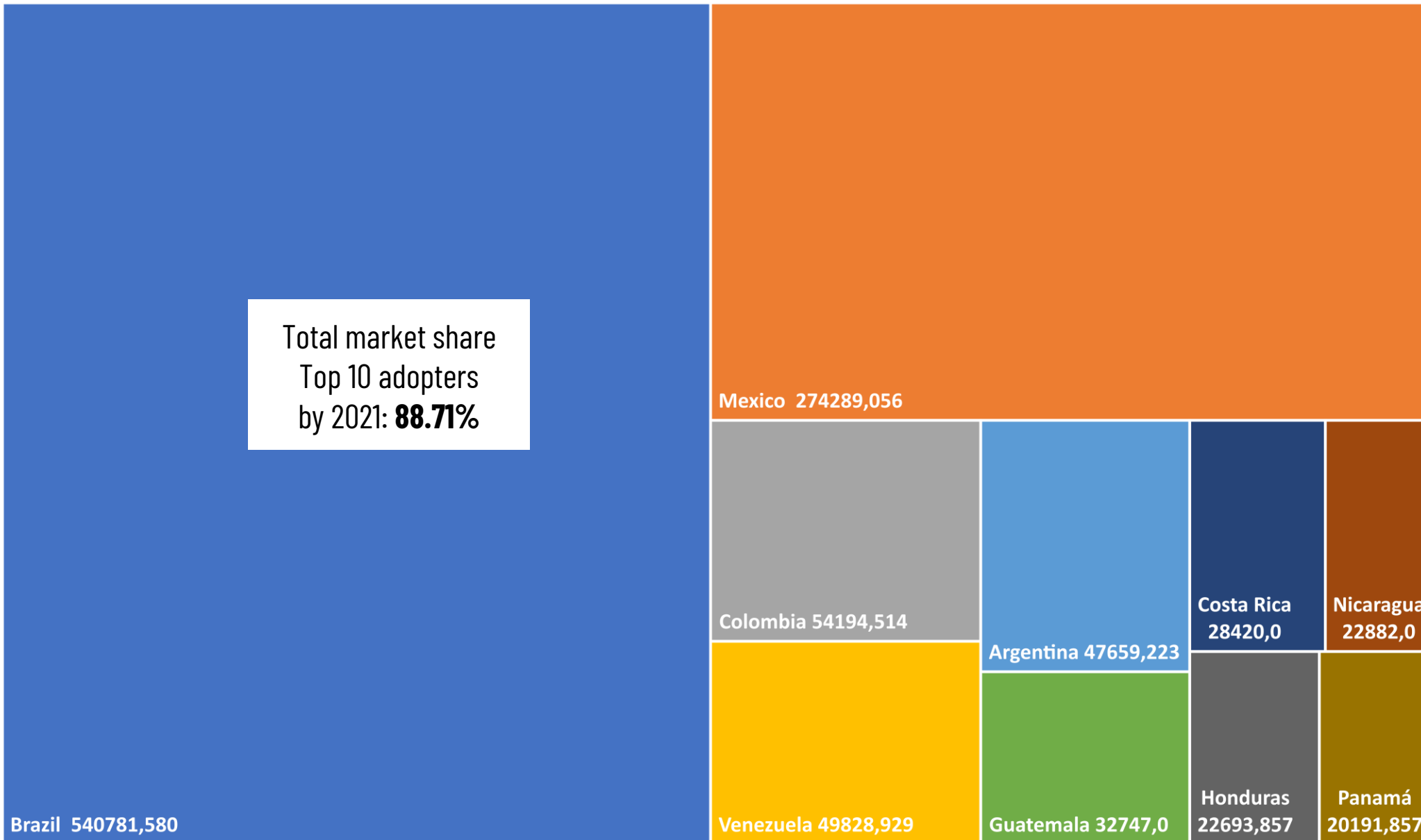
## CIAT *Urochloa* hybrid global adoption per region (%)





## Global Top 10 CIAT *Urochloa* hybrid adopters (in ha, by 2021)

Total market share  
Top 10 adopters  
by 2021: **88.71%**



## Global Top 5 CIAT *Urochloa* hybrid adopters (in ha, by 2021)

Total market share  
Top 5 adopters  
by 2021: **78.41%**

Brazil 540781,580

Mexico 274289,056

Colombia 54194,514

Venezuela  
49828,929

Argentina  
47659,223

# Top 5 CIAT *Urochloa* hybrid adopters in South America (in ha, by 2021)

Total area by 2021:  
**732,086 ha**

Brazil 1093688,016

Colombia  
54194,514

Venezuela  
49828,929

Argentina  
47659,223

Paraguay  
14681,031

# Top 5 CIAT *Urochloa* hybrid adopters in Central America incl. Mexico (in ha, by 2021)

Total area by 2021:  
**451,250 ha**

Mexico 274289,056

Guatemala 32747,0

Costa Rica 28420,0

Nicaragua  
22882,0

Honduras  
22693,857

# Top 5 CIAT *Urochloa* hybrid adopters in the Caribbean (in ha, by 2021)

Total area by 2021:  
**30,016 ha**

Cuba 16408,429

Dominican Republic 5175,0

Belize 5081,429

Puerto Rico 1628,986

Trinidad & Tobago  
756,157

# Top 5 CIAT *Urochloa* hybrid adopters in Africa (in ha, by 2021)

Total area by 2021:  
**6,388 ha**

Kenya 3740,071

South Africa 1657,143

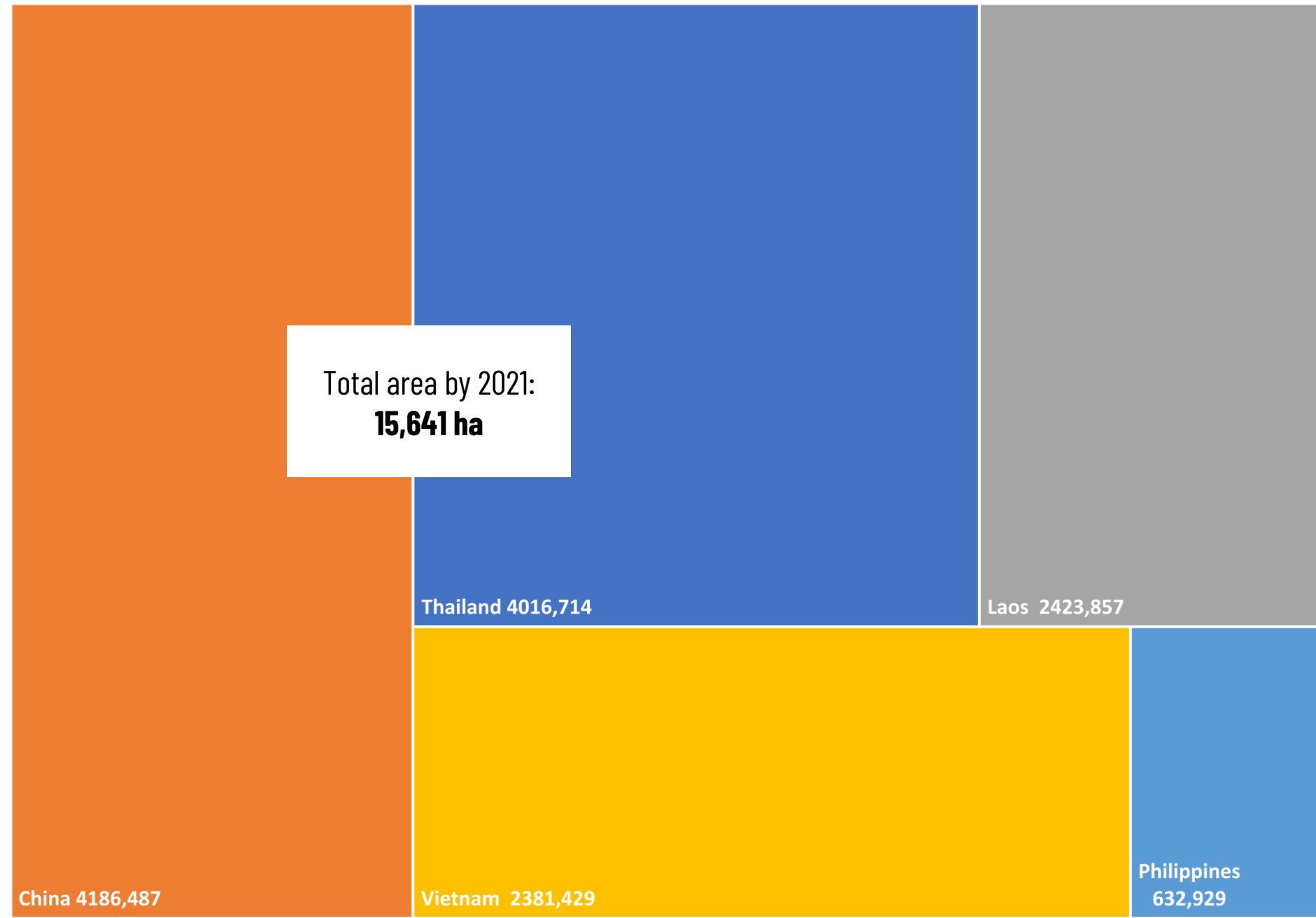
Congo 228,571

Ethiopia 539,143

Uganda 82,286

# Top 5 CIAT *Urochloa* hybrid adopters in Asia (in ha, by 2021)

Total area by 2021:  
**15,641 ha**



# Top 5 CIAT *Urochloa* hybrid adopters in Oceania (in ha, by 2021)

Total area by 2021:  
**9,689 ha**

Vanuatu 4495,714

Australia 1819,786

Papua New Guinea  
1556,196

New Caledonia 1254,286

Fiji 440,460



# Top 3 CIAT *Urochloa* hybrid adopters in North America and Europe (in ha, by 2021)

Total area by 2021:  
**17,820 ha**

United States 16488,636

Spain  
876,104

Italy  
428,571

# Key messages

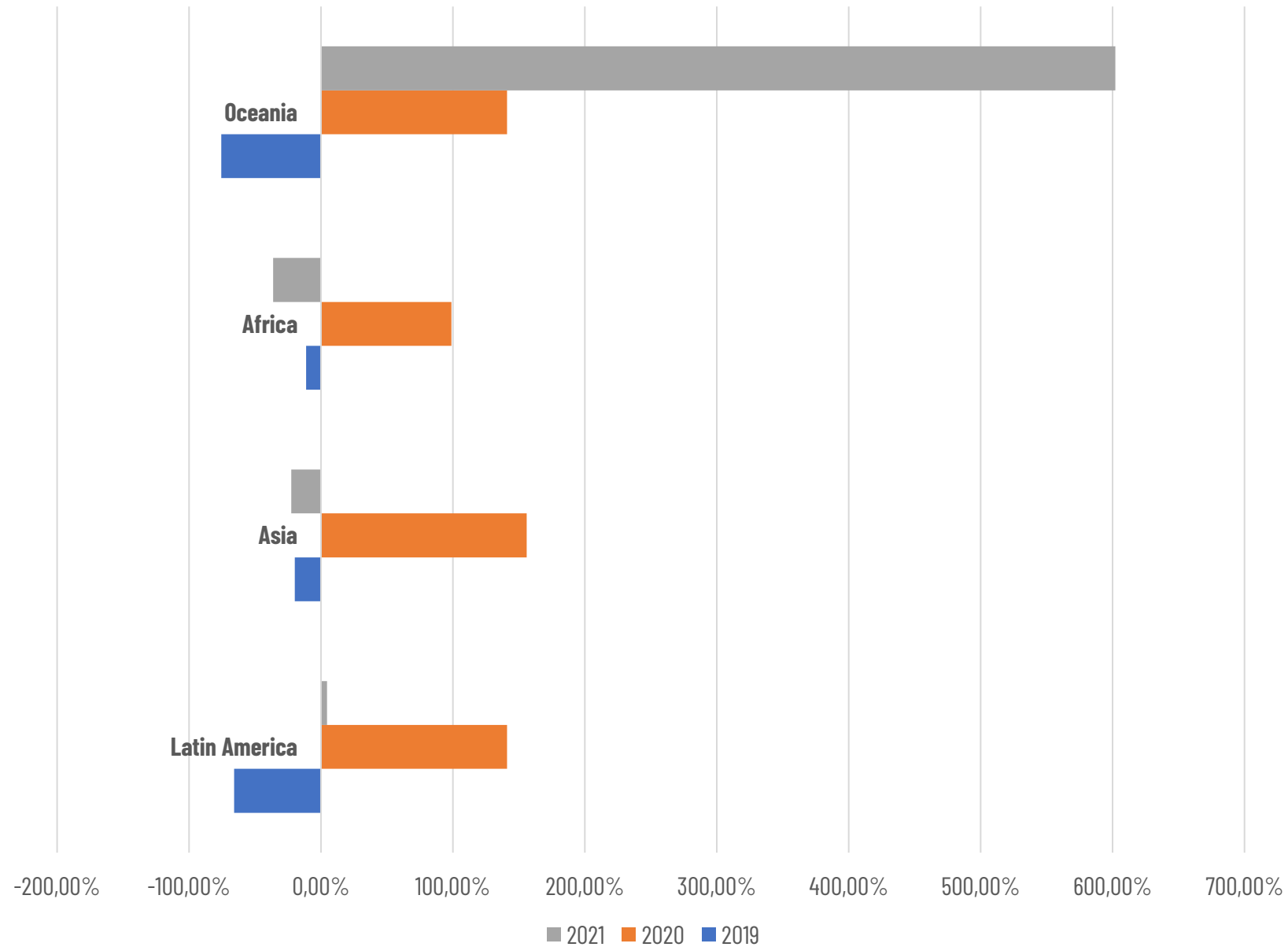
- Although CIAT's *Urochloa* hybrids are being sold on all continents, most of the adoption still happens in Latin America and the Caribbean, with a **market share of 96%** of the global hybrid seed sales.
- The global **Top 10 *Urochloa* hybrid adopter countries** make up **89.71%** of the global hybrid seed sales and the **Top 5 countries 78.41%**, respectively.
- **All Top 10 countries are located in Latin America**, all Top 5 countries are located in South America, with the exception of Mexico.
- **Brazil and Mexico are by far the largest adopters** of CIAT *Urochloa* hybrids. Together, they make up **>66%** of the global sales. Brazil alone is responsible for **44%** of the global sales.
- The largest adopters outside Latin America and the Caribbean are the U.S., Vanuatu, Thailand, and Kenya. Adoption is, however, still limited there.

# ***A quick glance at recent growth rates***

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## Urochloa hybrid adoption growth rates per region (compared with the respective previous year)



# Key messages

- In 2019, seed sales and thus *Urochloa* hybrid adoption decreased significantly in all regions, with Latin America and Oceania having decrease rates of >65% and >75%, respectively.
- In 2020, strong growth rates were observed – despite the COVID-19 pandemic, reaching 156% in Asia, 141% in Latin America, 141% in Oceania, and 99% in Africa.
- In 2021, contrary to the expected, growth rates could only be observed in Latin America (5%) and Oceania (506%), whereas seed sales dropped by 51% in Asia and 36% in Africa.



# Thanks!

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