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Introduction

- 1. Proprietary seed market accounts for almost 67% (Watch, 2009)
- 2. Horticultural seed companies are minor in world seed trade.
- Only Sakata and Takii are Asian seed companies ranked in world top 10 seed company. Both occupy only 2% of world seed market. → Seed companies based in Asia are still weak
- 4. Sakata and Takii are both strong in world flower seed market.
- 5. Zespri and Suntory, originated in Asia, are very strong worldwide in specific fields, eg) Kiwii and flower breeding
- 6. Crop oriented private company or governmental institutes are focusing on breeding and development of specific crops.

Horticultural seed market in Asia

Table 4. Horticultural Seed market in Asian countries.

Countries	Market size(million US\$)				
China	4,000				
India	1,500				
Japan	1,500				
Russia	500				
Australia	400				
Republic of Korea	400				
Other	300				
Total	8,600				

Horticultural seed market in Asia

- Vegetables: Chinese cabbage, Radish, Watermelon, Strawberry,
- Fruit trees: Kiwii fruit, Apple, Pears, Grape,
- Ornamental flowers: Lisianthus, Gentiana, Statice, Pansy, Petunia, seed Lilium
- · Companies:
 - Vegetables : Sakata, Takii, Nongyu, Nongwoo, Individual breeders etc.
 - Fruit trees : Governmental institute, Zespri int'l, individual breeders etc.
 - Flowers : Sakata, Takii, Myoshi, Suntory, Florigene etc.

Recent breeding activities for horticultural crops in Asia

Breeding tools?

Gene / Chromosome manipulation

+, - : Crossing

- : Mutation

 $\stackrel{\square}{}$ X: Polyploidisation (2x \rightarrow 4x \rightarrow 8x)

 \div : Haploidisation (2x \rightarrow x)

Plant breeding is the purposeful **manipulation** of plant species in order to create desired genotypes and phenotypes for specific purposes





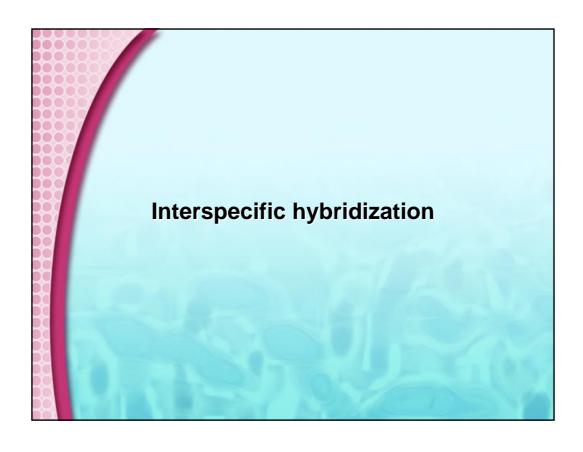
Tools for improving crop quality

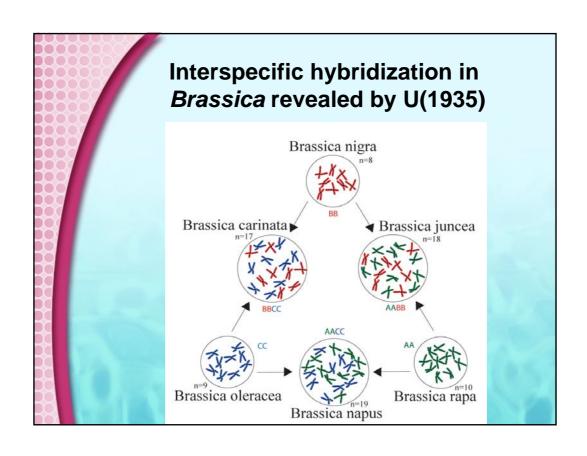
- Hybrid Breeding : SI, MS, haploid breeding, intra- or interspecific hybridisation : all crops
- 2. Mutation Breeding: ornamental flowers, cereals
- 3. GMO Breeding: ornamental flowers
- 4. Marker Assisted Breeding: vegetables, fruit trees



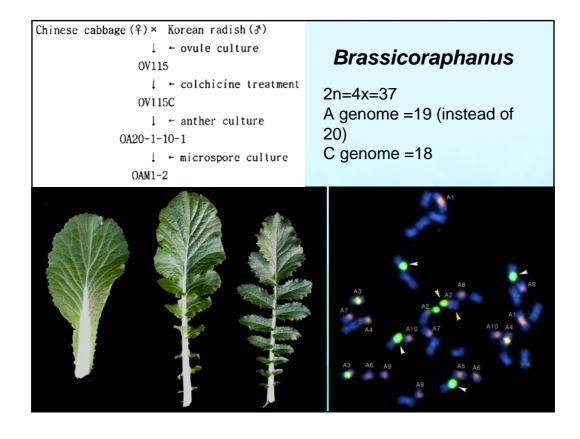


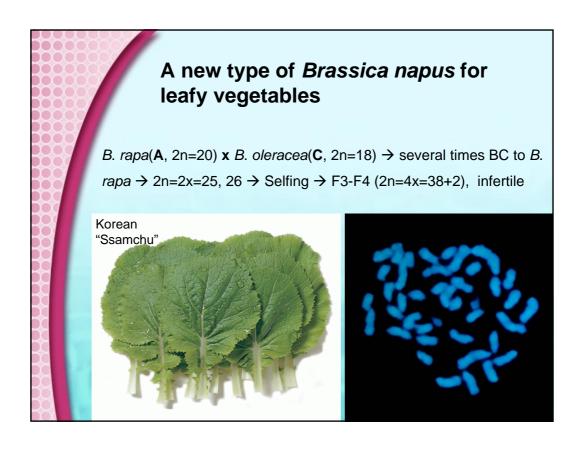


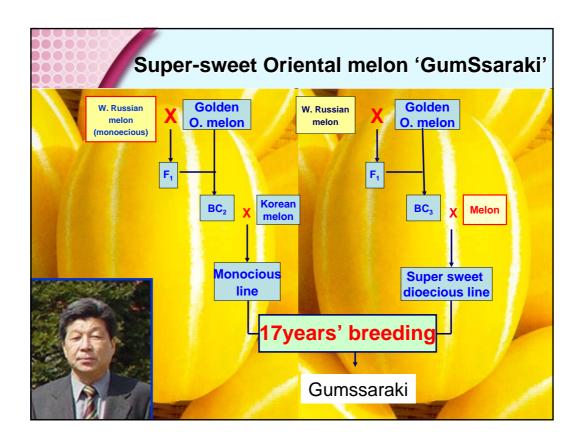


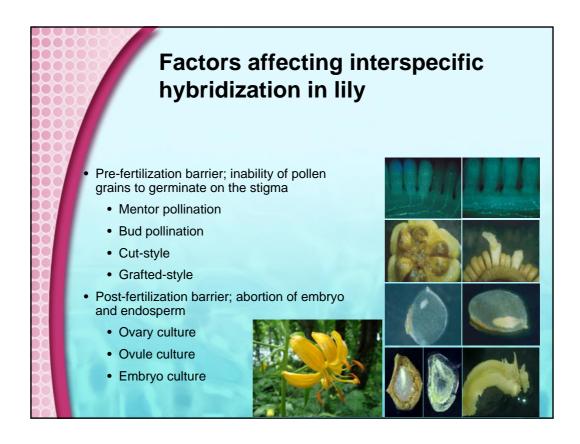


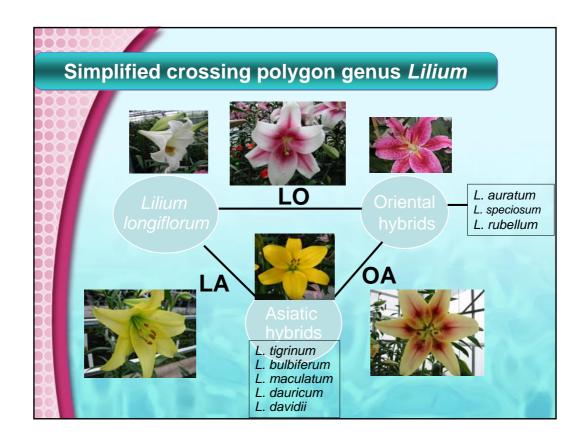


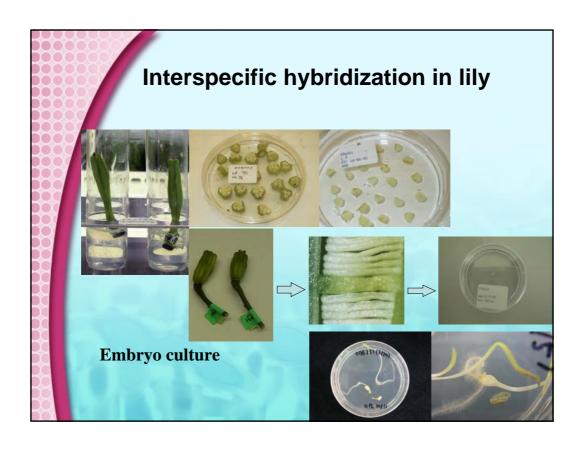


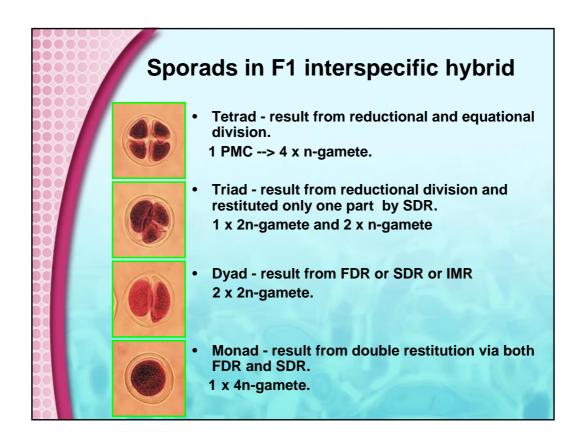


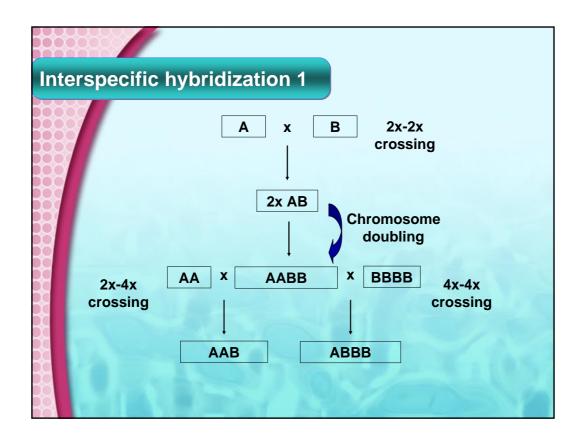


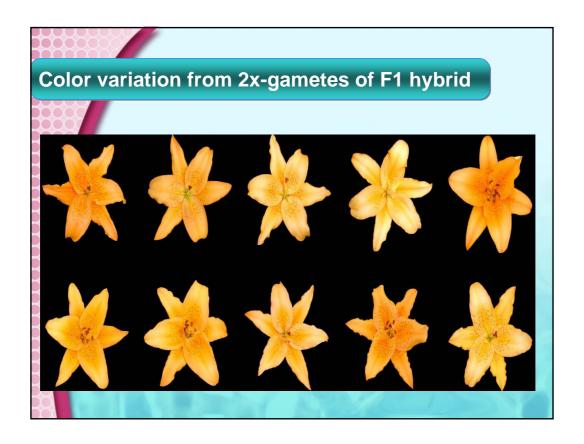


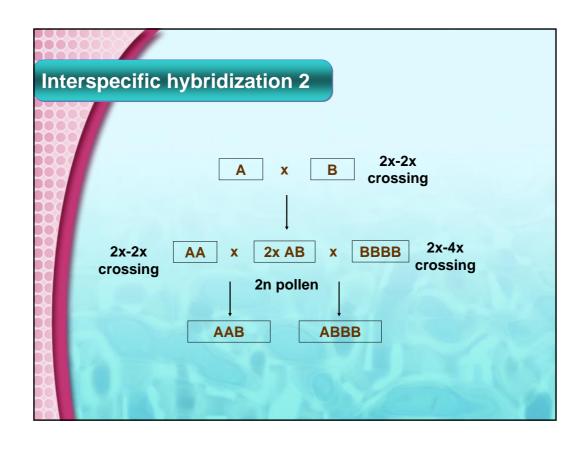




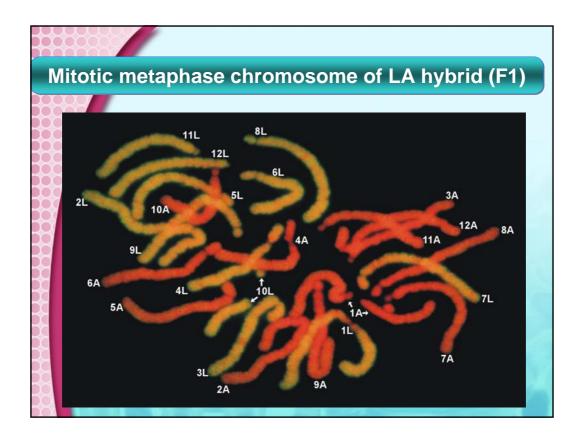


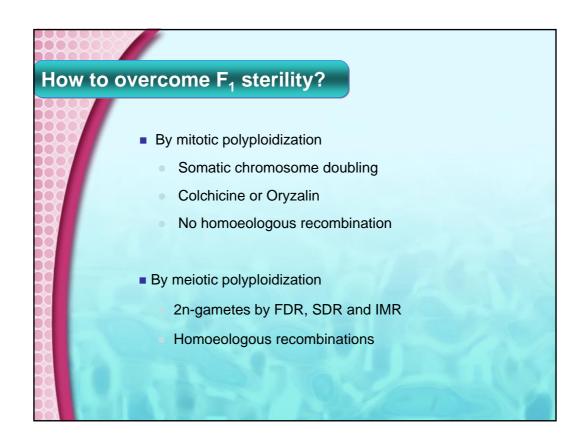


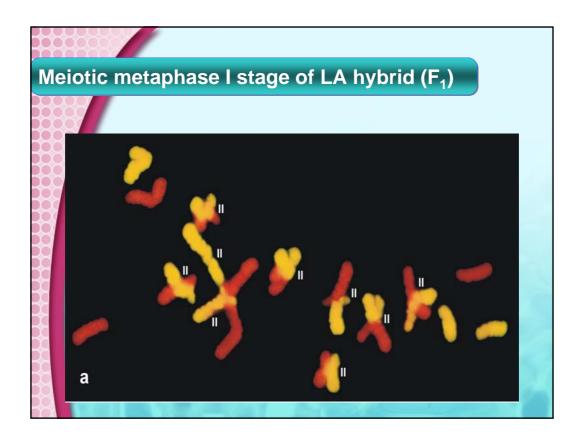


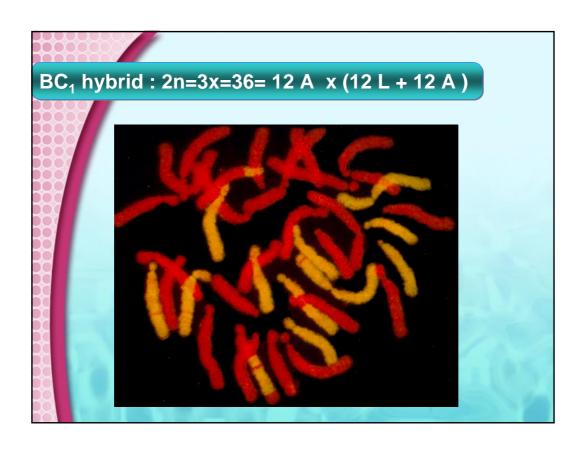


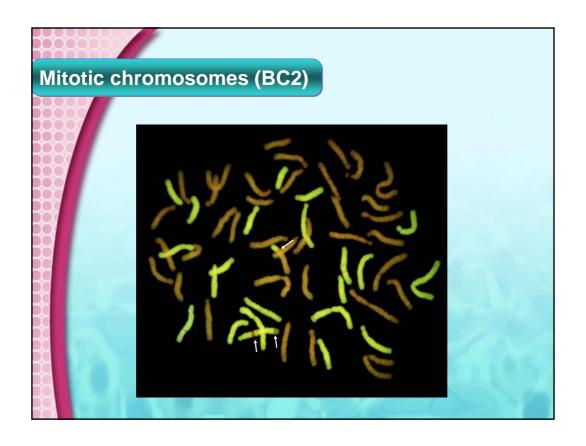


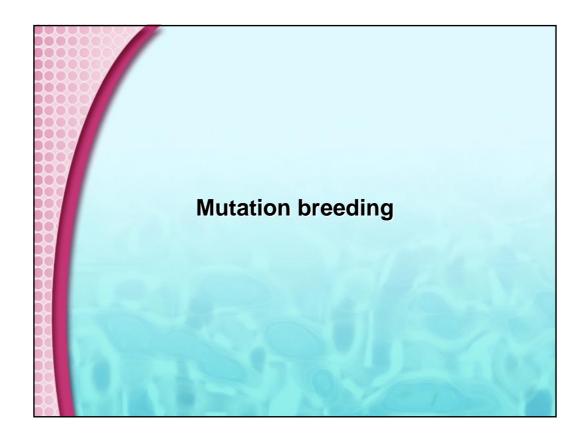












Plant Breeding using the ion beam irradiation

- RIBF is the biggest facilities capable of accelerating heavy ions world wide
- Ion beam is highly effective for inducing mutagenesis of tobacco embryos during fertilization without damage to other plant tissue. Eg) albino, periclinal chimera, sectorial chimera, herbicide-tolerant and salt-tolerant phenotypes
- 6 new flower cultivars on the market in Japan, USA, Canada and EU since 2002 by RIKEN: only three years breeding period
- The ion beam irradiation technique induces a high mutation rate without severe growth inhibition at relatively low doses.

Variety development by radiation breeding methods by countries in 2009

Crops	China	India	Japan	Russia	Korea	Netherlands	Germany	USA	
Major cereals	366(55.9)	58(21.4)	82(35.2)	41(19.4)	8 (42.1)	1 (0.6)	72(41.6)	39(31.2)	
Soybean	56 (8.5)	39 (14.1)	25 (10.7)	28 (13.3)	2 (10.5		10 (5.8)	26 (20.8)	
Minor cereals	70 (10.7)	9 (3.3)	4 (1.7)	62 (29.4)	-			12 (9.6)	
Industrial crops	23 (3.5)	29 (10.5)	9 (7.5)	10 (4.7)	-		-	3 (2.4)	
Oil	41 (6.3)	16 (5.8)	1 (0.8)	3 (1.4)	6(31.6)	- 4	-	1(0.8)	
Flowers	60 (9.2)	95 (34.4)	81(34.8)	40(19.0)	2 (8.0)	173(98.3)	80(46.2)	23(18.4)	
Fruit tree	20 (3.1)	2 (0.7)	6 (2.6)	7 (3.3)	7	(·		2 (1.6)	
Vegetables	17 (2.6)	14 (5.1)	14 (6.0)	10 (4.7)	1-3	2 (1.1)	1 (0.6)	3 (2.4)	
Others	2(0.3)	14 (5.1)	11 (4.7)	10 (4.7)	4		10 (5.8)	16(12.8)	
Total	655(100%)	276(100%)	233(100%)	214(100%)	19(100%)	176(100%)	173(100%)	125(100%)	
(FAO-IAEA MVD, 2009)									

Mutant lines developed in various crops using RIBF **lutant** Ion/Dose Survival/ Plant material Developer phenotype Mutation (%) (Gy) Sterile N/10 Verbena Stem 842.8 Suntory Flowers Ltd Cyclamen Tuber C/12 50/13 Hokko Chem, Ind. Co Ltd Flower color and shape Hiroshima City Agri Forest Prom, N/5 NE/20.3 Dahlia Shoot Cen. Rose Dormant scion Ne/15 70/51.7 Kanagawa N/30 90/43.1 Pref Agri Cent C/10 94/14 Chrysanth. Plt Btech. Inst. Ibaraki Agri, Cen. Stem Torenia Leaf/stem N/50 NE/1.9 NE/1.6 Ne/20 Variegation

ND

80/1.3

Suntory Flowers Ltd

Natl. Inst. Veget. and Tea Sci.

ND: no data, NE: no effect

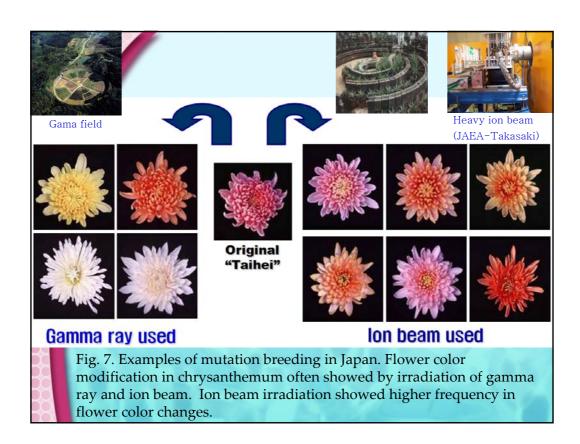
Petunia

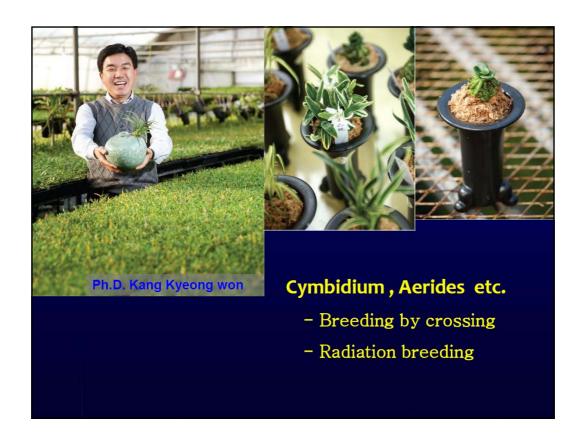
Stem

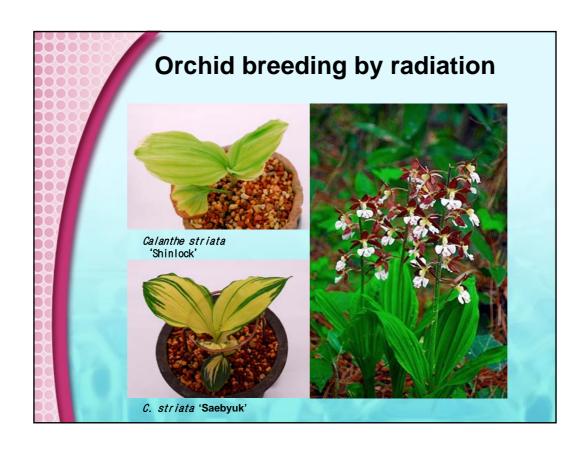
Sweet pepper Dry seed

N/5

Ne/10















Dendrobium kingianum 'Royal gold'

D. monifolium 'Royal present' Director general of IAEA with Oriental orchid mutant

- Application of radiation breeding in Orchids in Korea
- Chronic and acute irradiation of gamma ray on in vitro rhizome and seed of Oriental Cymbidium: Fragrance, cold resistance, dwarfism, resistant to climate
- Multiplication of mutant lines and commercialization : export to Japan, and other countries
- Inducing mutation of Orchids seeds via space radiation in 2008.



