

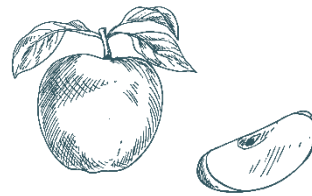
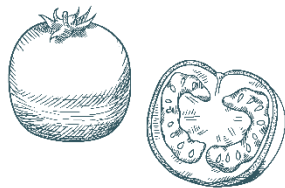


LIVESEED

Status-quo on supply and demand of
organic seed in Europe

North-Western Workshop 25-26 June 2020

Freya Schäfer - FiBL Germany



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LIVESEED analysis on supply and demand

- **A farmers survey** was conducted to understand reasons for (not-)using organic seed (~850 responses)
- **A seed supplier and breeders survey** was conducted to analyse the organic seed sector in Europe (210 responses)
- **A production analysis and an expert validation survey** was conducted to estimate the **potential demand and supply** of organic seed in Europe

More details at www.LIVESEED.eu



Farmers survey

Who is using more organic seed?

The highest share of organic seed use per farm was found:

- On farms that predominately grow **vegetables**, whereas the lowest share was found on **forage** farms
- On farms in **Northern and Central Europe**, where most organic seed production takes place
- On farms selling **directly to consumers** and to **organic shops**

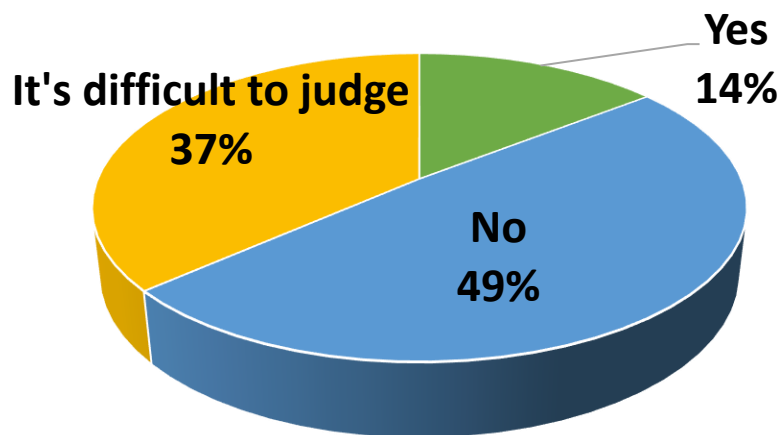
(BUT... 60% of organic food in Europe is sold in supermarkets!)



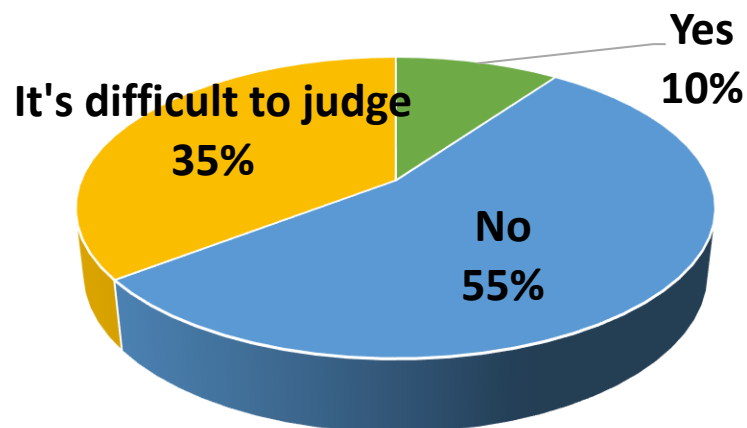
Farmers survey

Specific issues with organic seed?

More **germination** problems with organic seed?

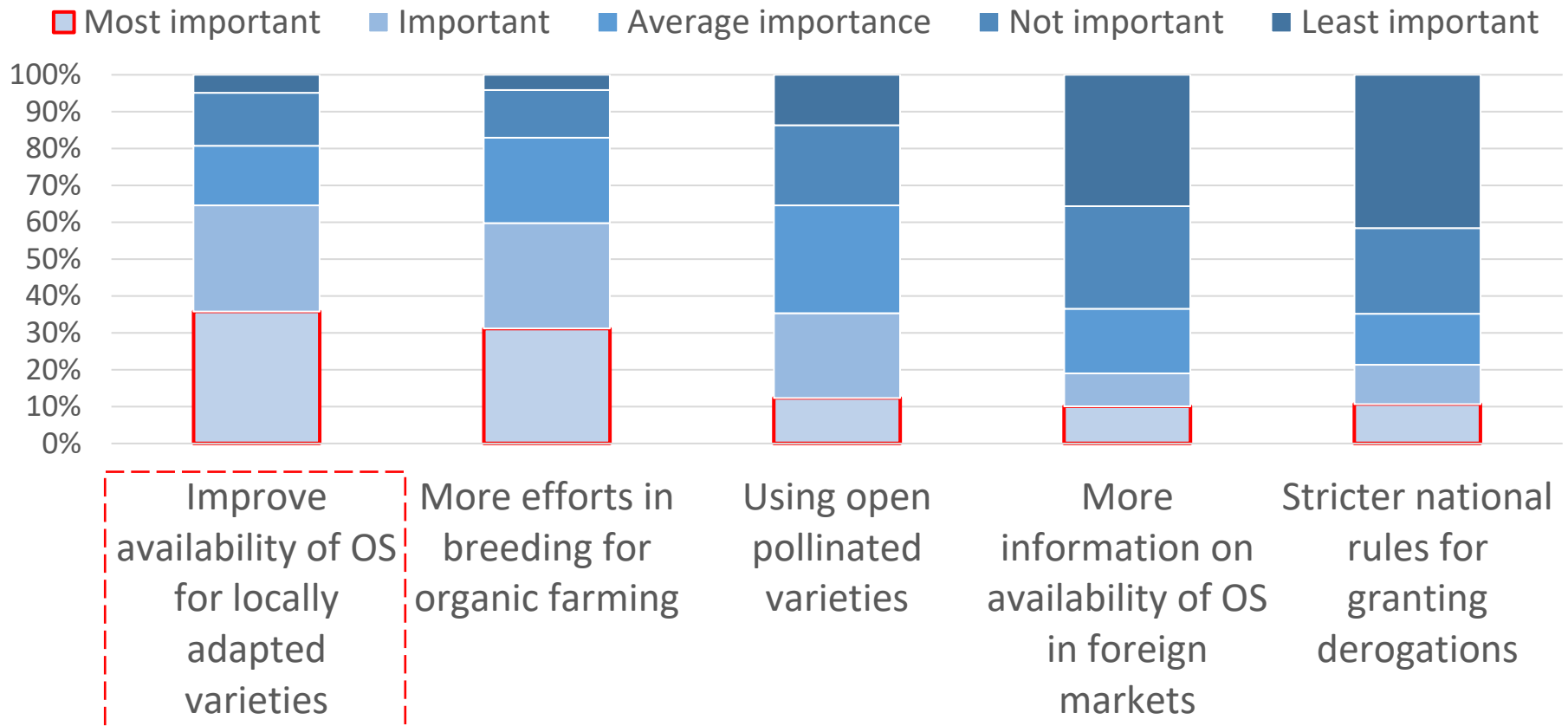


More **pests and disease** problems with organic seed?



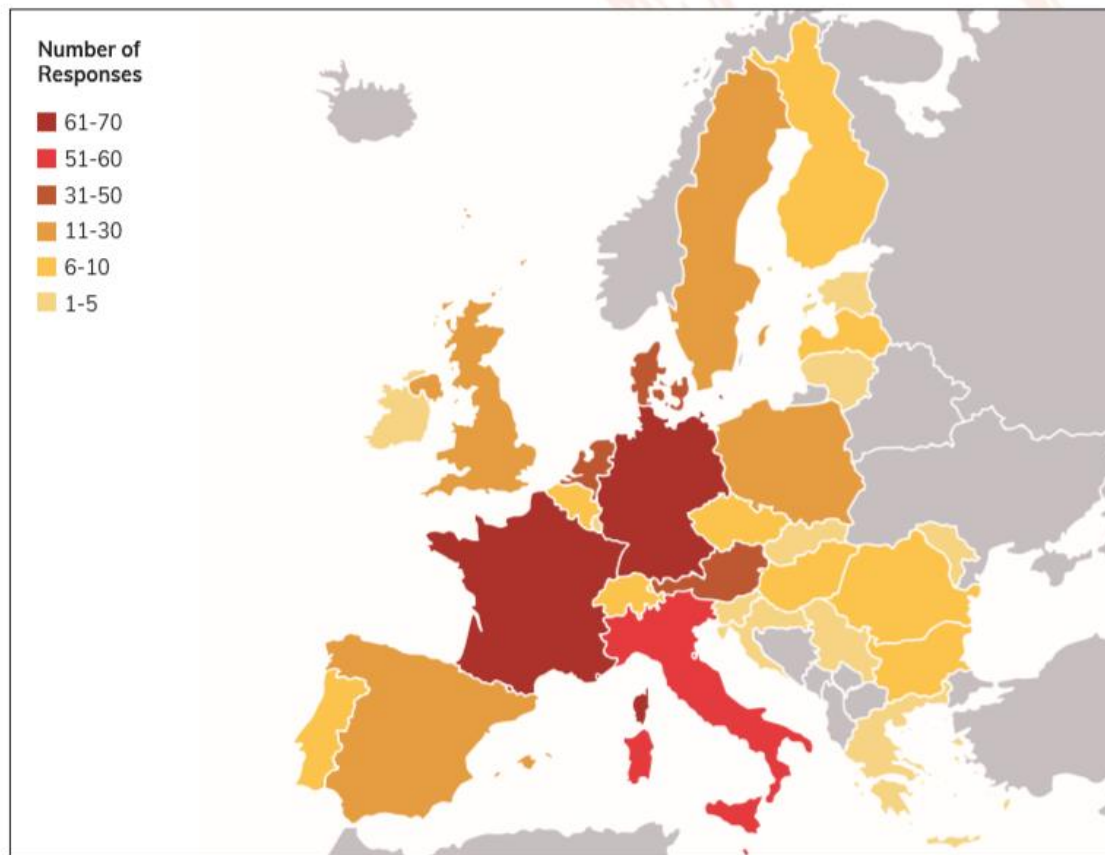
Farmers survey

Ranked actions by farmers to boost organic seed use



Seed supplier and breeders survey

Organic seed production



Most important countries for organic seed production:

- France
- Germany
- Italy
- Denmark
- The Netherlands
- Austria

FIGURE 4.1 Geographical distribution of organic seed production as indicated by European seed companies (based on frequency of responses to question “Where does your company produce organic seeds or have them produced?”).

Seed supplier and breeders survey - Organic seed market perspectives

Organic Seed Sales Turnover Variation

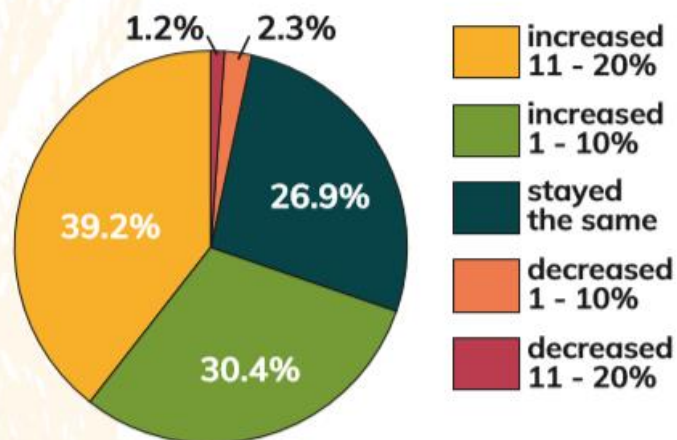


FIGURE 4.2 Yearly variation in organic seed sales gross turnover, based on a five-year period (2013-2017) (n=171).

Organic Seed Investment Prospects

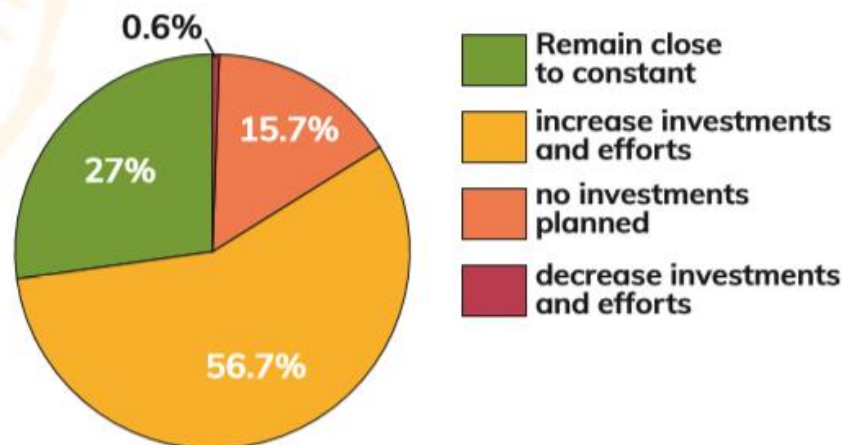


FIGURE 4.3 Planned investments in the organic seed sector by European seed companies over the next 5 years.

Seed supplier and breeders survey

Technical challenges in organic seed production

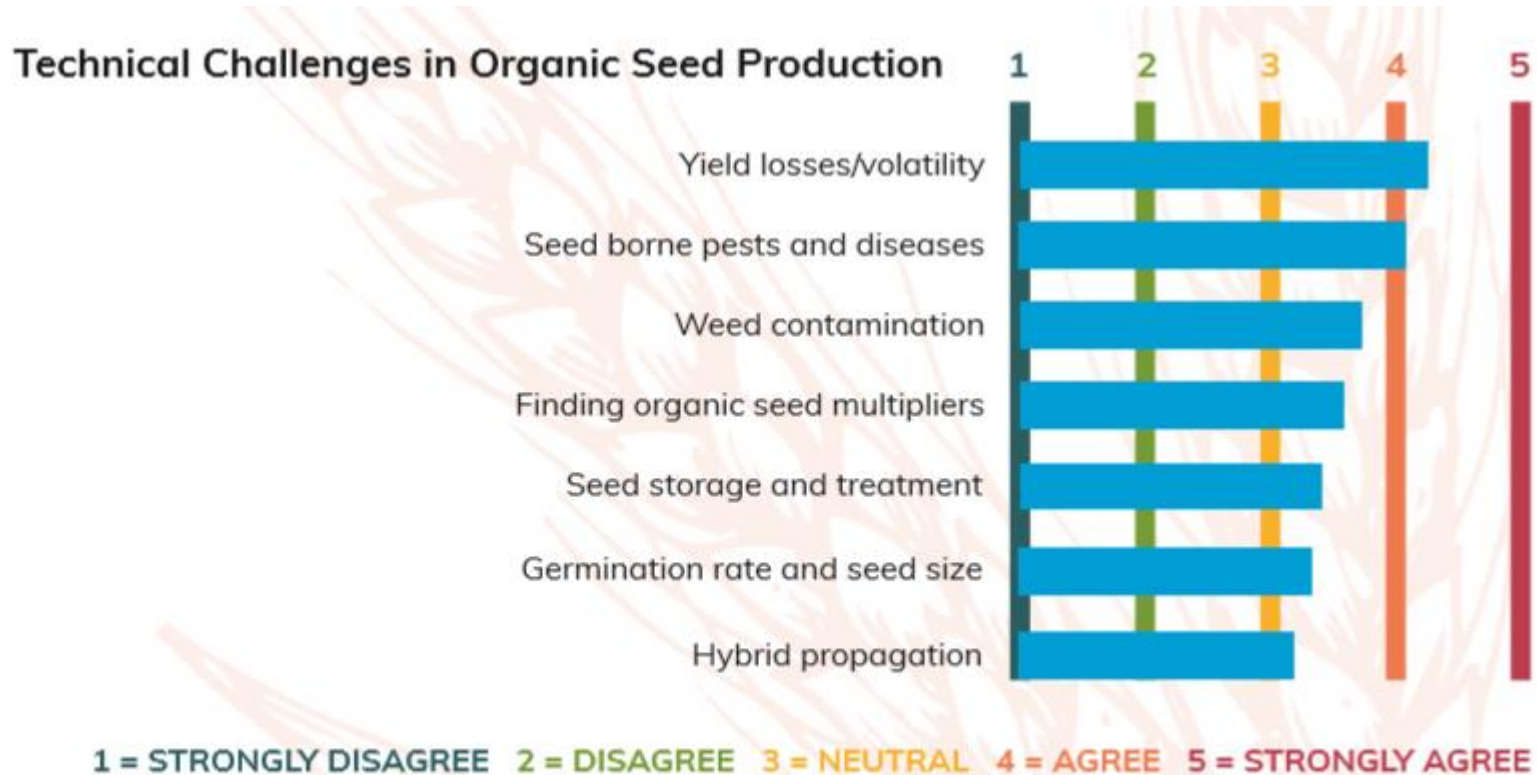


FIGURE 4.4 Seed companies' rating of technical challenges related to organic seed production

Seed supplier and breeders survey

Marketing issues with organic seed

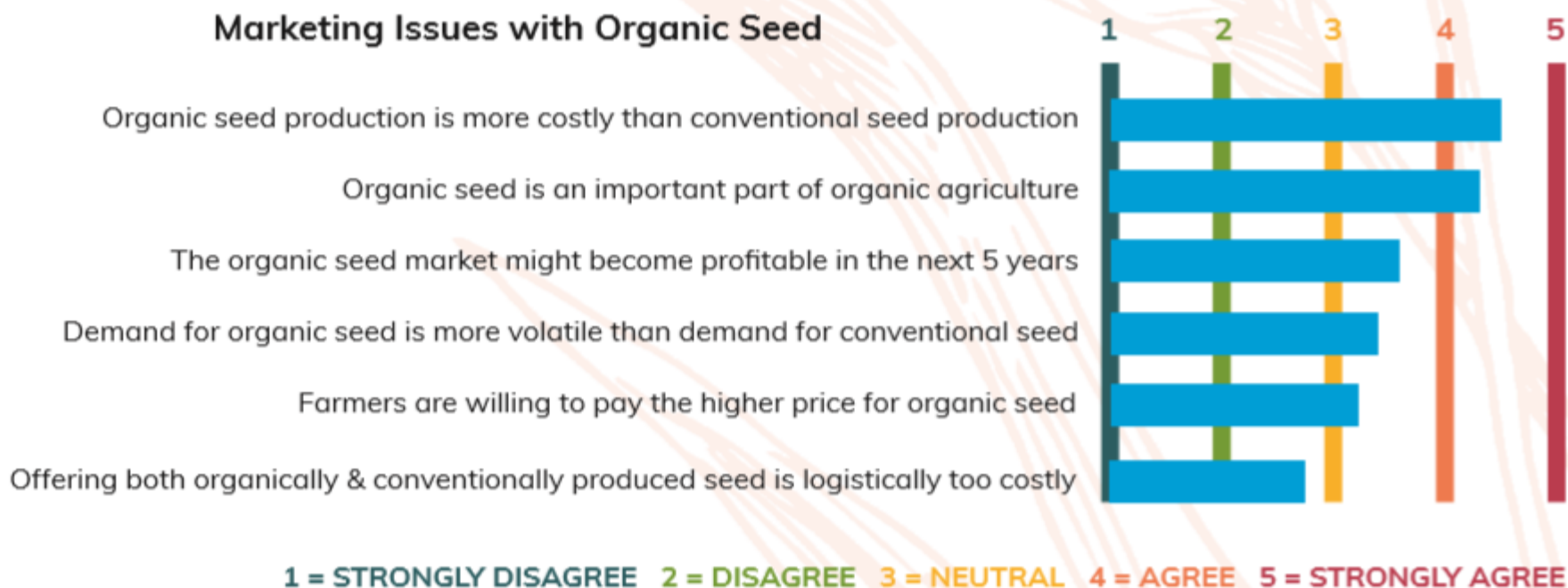


FIGURE 4.5 Seed companies' perception on organic seed marketing issues

Seed supplier and breeders survey

Policy measure to enhance organic seed production

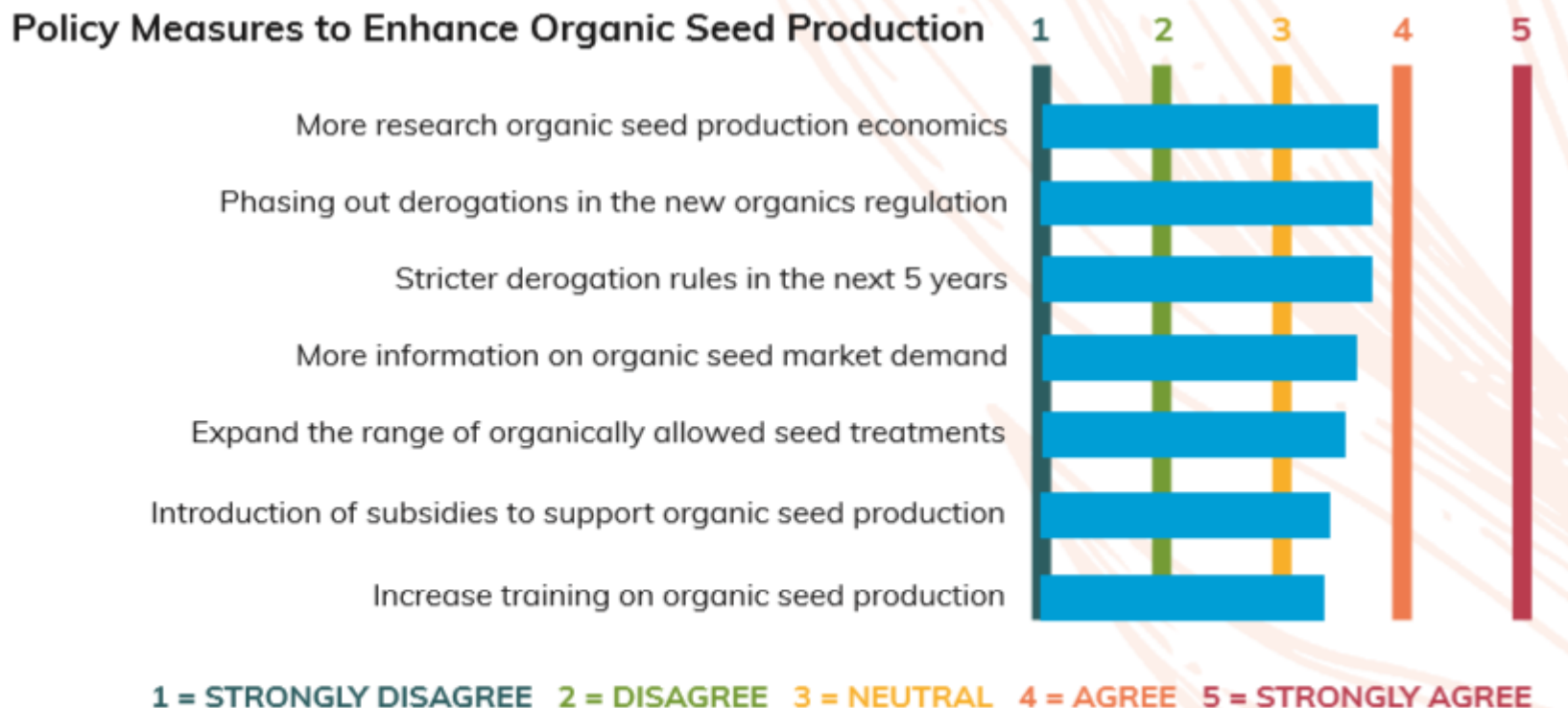
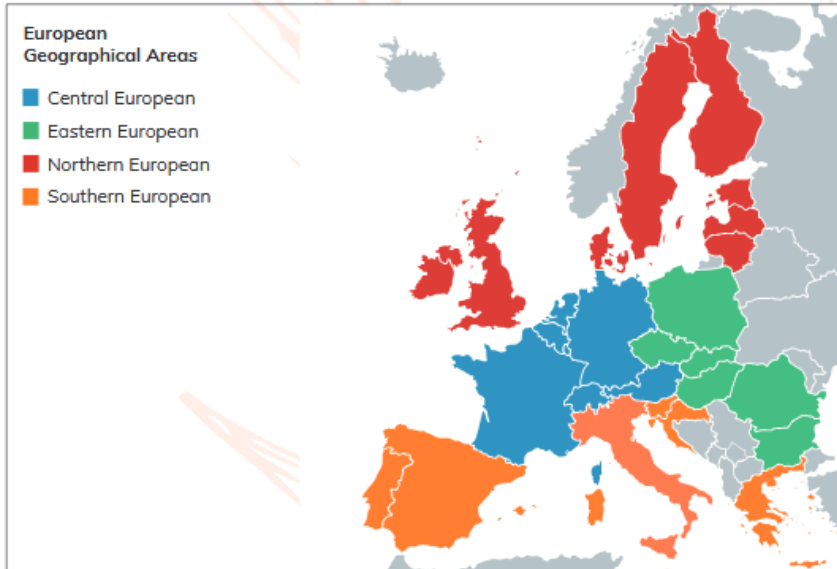
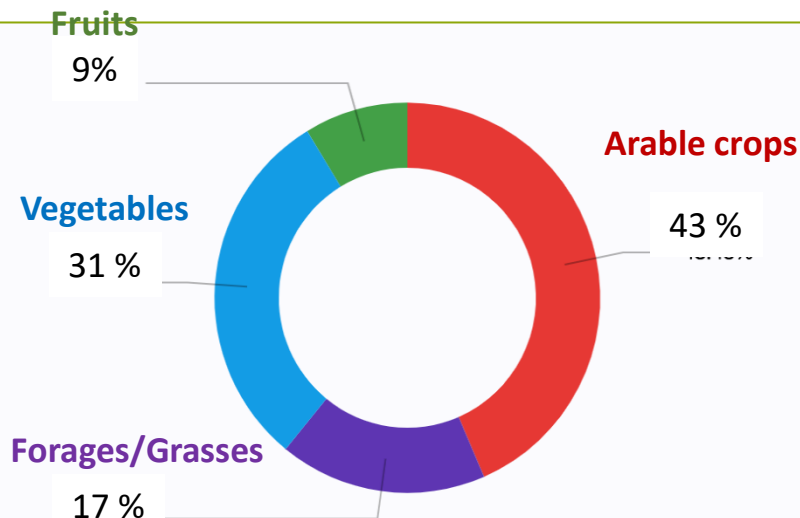


FIGURE 4.6 Seed companies' rating of policy measures addressing organic seed production bottlenecks

Production analysis & expert validation survey

37 experts & 18 countries

- seed companies
- organic associations
- farmers' coop.
- researchers



- **Objective:** validate the average percentage of organic seed for each organic crop and country/EU region.
- Each expert was sent a questionnaire with instructions to **validate and comment** on each crop based on their knowledge and experience.
- **Online survey:** from October 2019 to December 2019

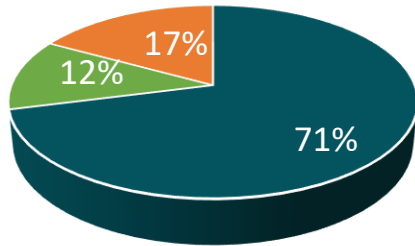
Estimation from farmer survey

ORGANIC SEED SUPPLY

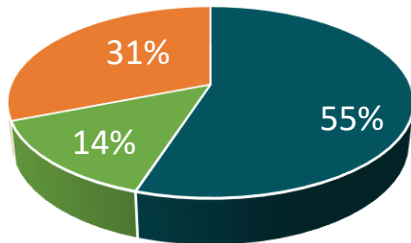
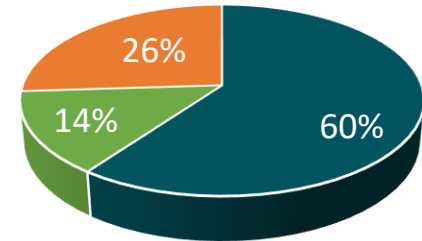
NON-ORGANIC SEED SUPPLY*

ORGANIC FARM SAVED SEED

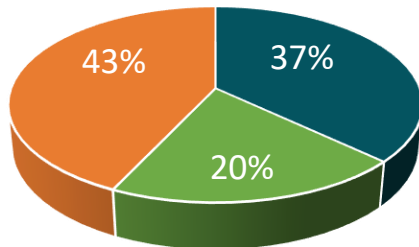
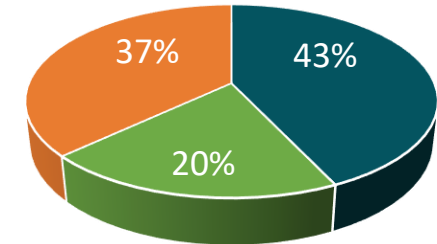
Validation with experts



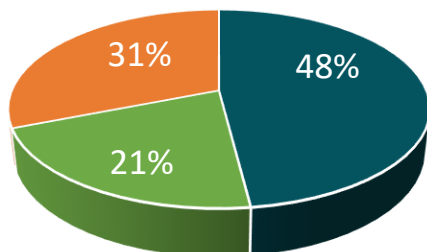
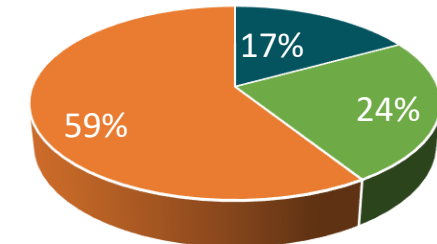
Central EU



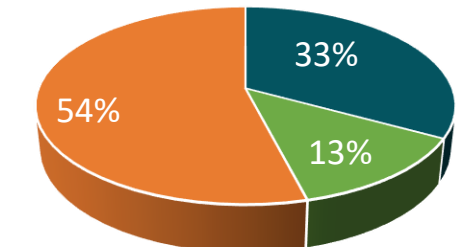
Northern EU



Eastern EU



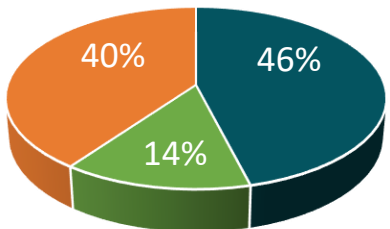
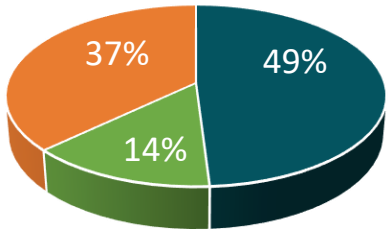
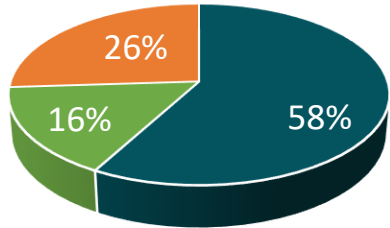
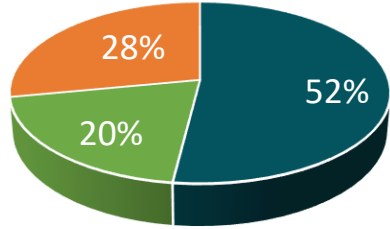
Southern EU



Rate of seed sources on organic farms
by EU + CH areas - 13 strategic crops in 2016

* untreated conventional seeds used in organic farming

Estimation from farmer survey



ORGANIC SEED SUPPLY

NON-ORGANIC SEED SUPPLY *

ORGANIC FARM SAVED SEED

Arable EU



Vegetable EU



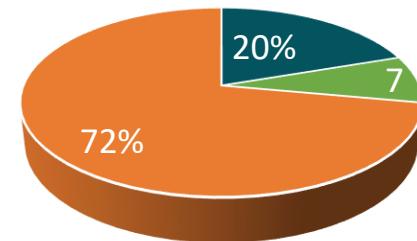
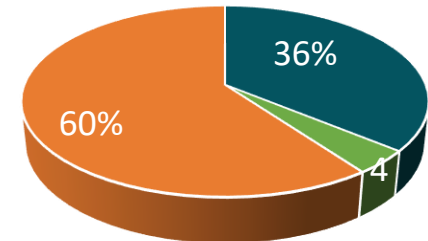
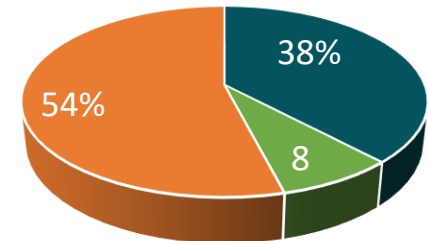
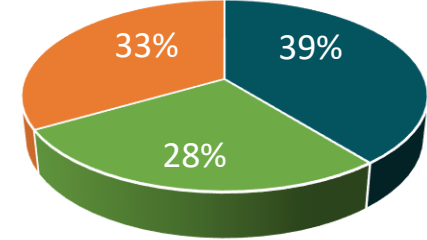
Forage EU



Fruit EU



Validation with experts



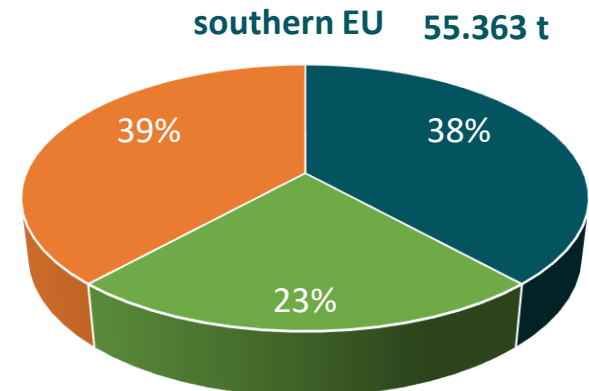
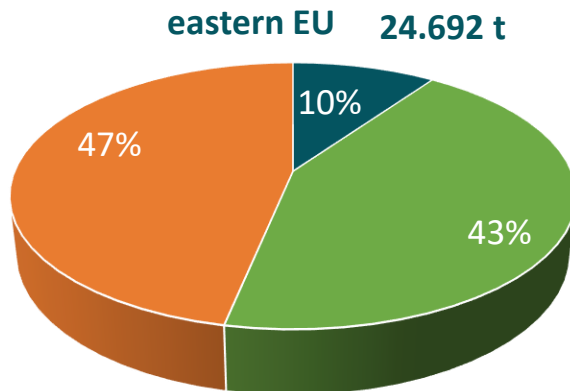
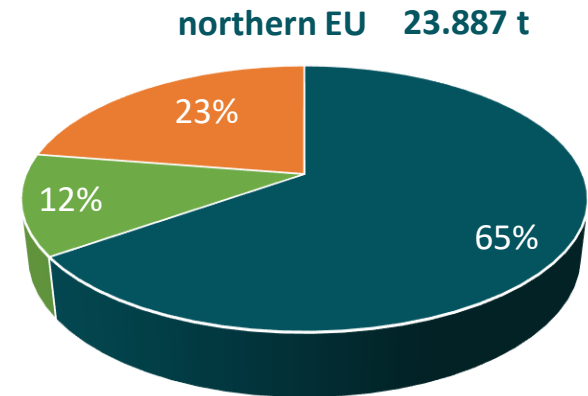
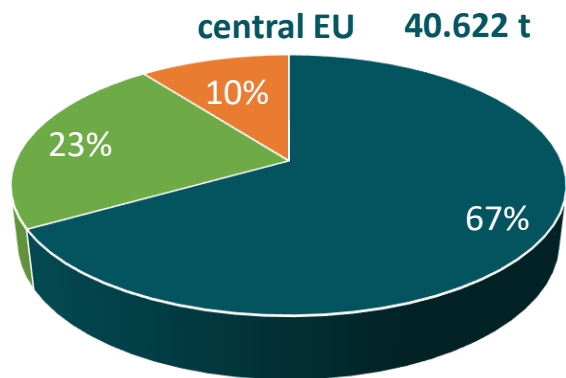
Demand and supply of seed & plant reproductive material used in OF (EU + CH in 2016)

| | Organic seed supply (Amount & percentage) | | Non-organic seed supply ** (Amount & percentage) | | Organic farm saved seed (Amount & percentage) | |
|------------------|--|-----|---|-----|--|-----|
| GRAINS | | | | | | |
| Wheat (t) | 61.071 | 42% | 39.694 | 28% | 43.799 | 30% |
| Grain_maize (t) | 1.221 | 44% | 1.138 | 41% | 436 | 16% |
| Barley (t) | 21.013 | 47% | 9.923 | 22% | 14.163 | 31% |
| LEGUMES | | | | | | |
| Lupine (t) | 2.582 | 66% | 590 | 15% | 730 | 19% |
| Soybeans (t) | 4.650 | 46% | 3.358 | 33% | 2.133 | 21% |
| Peas (t) | 5.572 | 38% | 3.017 | 21% | 6.039 | 41% |
| Lucerne (t) | 1.145 | 50% | 901 | 39% | 255 | 11% |
| VEGETABLE | | | | | | |
| Tomatoes * | 81.656.213 | 22% | 247.577.029 | 68% | 35.905.821 | 10% |
| Onions * | 2.132.177.002 | 61% | 1.195.814.254 | 34% | 160.039.191 | 5% |
| Carrots (t) | 6 | 27% | 15 | 70% | 1 | 3% |
| FRUIT | | | | | | |
| Apples * | 1.858.114 | 41% | 1.974.877 | 43% | 715.199 | 16% |

Crops marked with * are quantified in terms of number of transplants.

** untreated conventional seeds used in organic farming

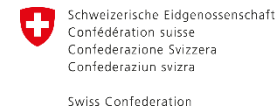
Demand and supply of wheat seed used in OF EU + CH in 2016



* untreated conventional seeds used in organic farming



LIVESEED



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