



Embracing technological progress - how the EU PRM rules can contribute

EU Advisory Group on the Food Chain; 18.02.2022



Who we are

34

National member associations from EU Members States and beyond, which in turn represent many thousand seed businesses across Europe.

67

Direct company members from family businesses to multi-nationals, including seed related industries.

Euroseeds has members also in other parts of the world: e.g. in the USA, Canada etc.



Mission:

Maintaining the EU's global leadership in seed exports by keeping clear and workable rules and market access conditions;

Providing a broad range of high-quality seed products for all types of agriculture, including organic, as a result of innovative and diverse breeding and seed production programmes;

Fostering future plant breeding innovation in the EU by assuring investment in plant breeding and protecting inventions and plant breeders' rights.

The EU seed sector

EMPLOYMENT:
approx.

52.000

**ANNUAL R&D
SPENDING:**

up to: **20%**

(of the companies'
turnover)

**R&D
STATIONS:**

750

SEED MARKET IN THE EU:

**COMMERCIAL
SEED MARKET**
value: **€ 10 bn***

**FARM
GATE** value
of agricultural
products:
> € 100 bn

**PROCESSED
AGRICULTURAL
PRODUCTS**
value:
> € 1.000 bn

**Source: OECD (2018), Concentration in Seed Markets: Potential Effects and Policy Responses, OECD Publishing, Paris.*

Guardians and creators of biodiversity

3.500 NEW
VARIETIES

of agricultural and vegetable
species come to the
EU market **EVERY YEAR***.

42.000 DIFFERENT
VARIETIES

of agricultural and vegetable
species are available to EU
farmers **TODAY***.

Source: **Source: EU common catalogues of varieties of agricultural plant and vegetable species*

Commission questions: adapting to technological progress

- Use of new technologies in variety registration and certification – international developments:
 - hybrid production,
 - true potato seed,
 - in vitro propagation of PRM
 - BMT
 - Digitalisation
- What are the specific needs that the EU PRM legislation would need to cater for?
 - This does not refer or relate to NGT/GMO!



Introduction: technological progress

- Two key areas of development to consider:
 - Breeding technologies such as e.g. hybridization systems, seed production methods etc.
 - Digital & online systems e.g digital traceability, digital labelling, admin. fee payments etc.




Introduction: technological progress

- **PRM should facilitate rapid uptake of new genetic and seeds contribution to sustainability**
 - Short consultation and legislative processes to adapt and add new standards where needed and merited (e.g. adaptation of requirements for marketing of hybrid wheat) and to list/delist species in the scope of the Seed Marketing Directives (e.g. the amendment of 2002/55/EC to add some species)
- **PRM administrative systems should take full advantage of digitalization to become fast, efficient, low cost and accessible to all**
 - Regulatory texts focus on principles and information to be provided
 - Short administrative processes to adopt and standardise digital means of information exchange



Breeding & genetics

- Cost and time efficiencies between PRM & PVP using 'one key several doors' DUS remains essential for breeders (cost efficiency)
- Use of molecular methods in DUS testing therefore should remain aligned with developments in that area in UPOV
- Genomic selection and phenotype performance prediction in local environments for VCU remains a very imprecise method due to high complexity of interaction between plants and their growing conditions (Genetics x Environment)
- New production means (e.g. true potato seed) require specific seed standards and respective rules
- Hybridisation (e.g. wheat) requires adapted standards to take account of new production methods
- Molecular characterization is likely to offer cost efficiencies once the technology improves
- Alignment with international seed trade schemes (OECD) need to be facilitated and assured
- Other new developments within the lifetime of the new legislation will come: adaptability required



**ADAPTABILITY
ALIGNMENT**

Digital administration systems

- 'Real time' addition to digital EU Common Catalogue from national registers
- E-certification and e-certificates for all companies
- Online payment of administrative fees
- User information databases ("information hub")
- Continual alignment with international standards (ISTA)
- Online record-checking and compliance audit for official supervision
- Electronic traceability and digital labelling to replace paper (e.g. OECD e-certificate)
- Automatic digital interfaces between official systems and companies ERP systems
- Real time transmission of seed certification/labelling/sampling/testing information

PAPERLESS
ACCESSIBLE
HARMONIZED
LOW COST



Conclusions

- Technological developments are fast changing and can not be predicted for the potential lifetime of a new seed “acquis”
- Legislation should be primarily framed around what information is required to be transmitted/audited
- Process for amendment of procedures and consultations needs to be enabled to make changes to standards, procedures and information transmission methods within short timescales





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