



# **ESA**

## **European Seed Association**

**Breeding and seed production in  
the 21st century –  
challenges and expectations of  
the EU seed industry**

**Garlich v. Essen**  
Secretary General



# Seed industry's challenges



**Contribute to food security**

**Help to reduce the environmental footprint**

**Develop high quality varieties for all markets**

**Support integrated production chain management**

**Sustain technological competitiveness**

**Contribute to proportionate and effective Regulation**





# Seed makes food and feed



**Contributing to food and feed security**  
**Reducing the environmental footprint**



- 9.5 billion world population in 2050
  - Climate change
  - increase production
  - enable production
  - safeguard production
  - protect production
- } sustainably!

→ **Classical breeding goals are as valid today  
as they were in the past!**



# Seed makes more...



**Fuel, Fibre and Further...**

**Quality seed of high performing varieties is precondition for a competitive production of**

- **biofuels / bioenergies**
- **biofibres**
- **further plant based products for industrial, medical or other uses**



**→ seed is a starting point for „Greening“ the EU's economy**



# Seed industry: creating value



The European seed industry's customers:

- farmers and growers, worldwide
- food and feed industry
- industrial and other non-food users



Cost conscious clientel that looks for identity, performance and quality to create value for their customers

Seed of high quality varieties kick off today's value chains (identity, traceability) in the agri-food sector





# EU seed industry today



**Turnover:  $\approx$  6.5 – 7 billion EUR**

**$\approx$  1000 companies, vast majority SMEs**

**R&D share of turnover:  $\approx$  15 %**

**Largest seed market worldwide**

**Largest exporter of seed worldwide**

**Continuous flow of new varieties**

**Seed of new varieties is the single largest contributor to growth in agricultural productivity**





# Seed industry's expectations



**Better Regulation - ESA's terms of reference:**

**Strengthen the competitiveness of the EU seed sector**

• **Maintain and enhance a true Common Market for seed in line with international standards and taking account of crop specific requirements\***

- **DUS: identity**
- **VCU: performance**
- **Certification: quality**

\* VCU and certification are not required for vegetables





# Seed industry's expectations



**Better Regulation - ESA's terms of reference:**

**Strengthen the competitiveness of the EU seed sector**

• **Safeguard and promote the innovation capacity of the seed industry**



- **Support R&D and access to genetic resources**
- **Support enforcement of IPRs**
- **avoid overregulation of new technologies**
- **no additional authorisation requirements**
- **SME compatible**

**→ KBBE – the knowledge based bio economy**





# Seed industry's expectations



**Better Regulation - ESA's terms of reference:**

## Strengthen the competitiveness of the EU seed sector

•Take account of the international development and provide practical rules for GM varieties and AP of GMOs in conventional seed

•Integrate the phytosanitary dimension. **Healthy seed is the base for healthy crops.**





# Seed industry's expectations



**Better Regulation - ESA's terms of reference:**

**Strengthen the competitiveness of the EU seed sector**

- **Efficient, cost-effective administration of the '*acquis communautaire*' : Better Administration**
- **Public-private partnership in decision making and management: Better Governance**





# Better Regulation for Seed



- **Maintain, strengthen and enforce the constitutional elements of the EU seed legislation (DUS, VCU, Certification, IP)**
- **Align, streamline and improve the implementation of these provisions**
- **Supplement the legal framework with workable and proportionate provisions where needed**
- **Involve seed industry in the management of the system to increase efficiency and cut costs**



# Better Regulation for Seed



**A regulatory framework that strengthens the competitiveness of Europe's seed sector will**



- **Safeguard Europe's leading role in plant breeding and biotechnology**
- **Contribute to the EU's policy of becoming the leading knowledge based bio economy**
- **Strengthen the competitiveness of Europe's farmers and agri-food sector**
- **Contribute to global food security**