7th ECO-PB workshop

on Organic Seed Regulation

Organic seed propagation and plant breeding

Preliminary results of the survey

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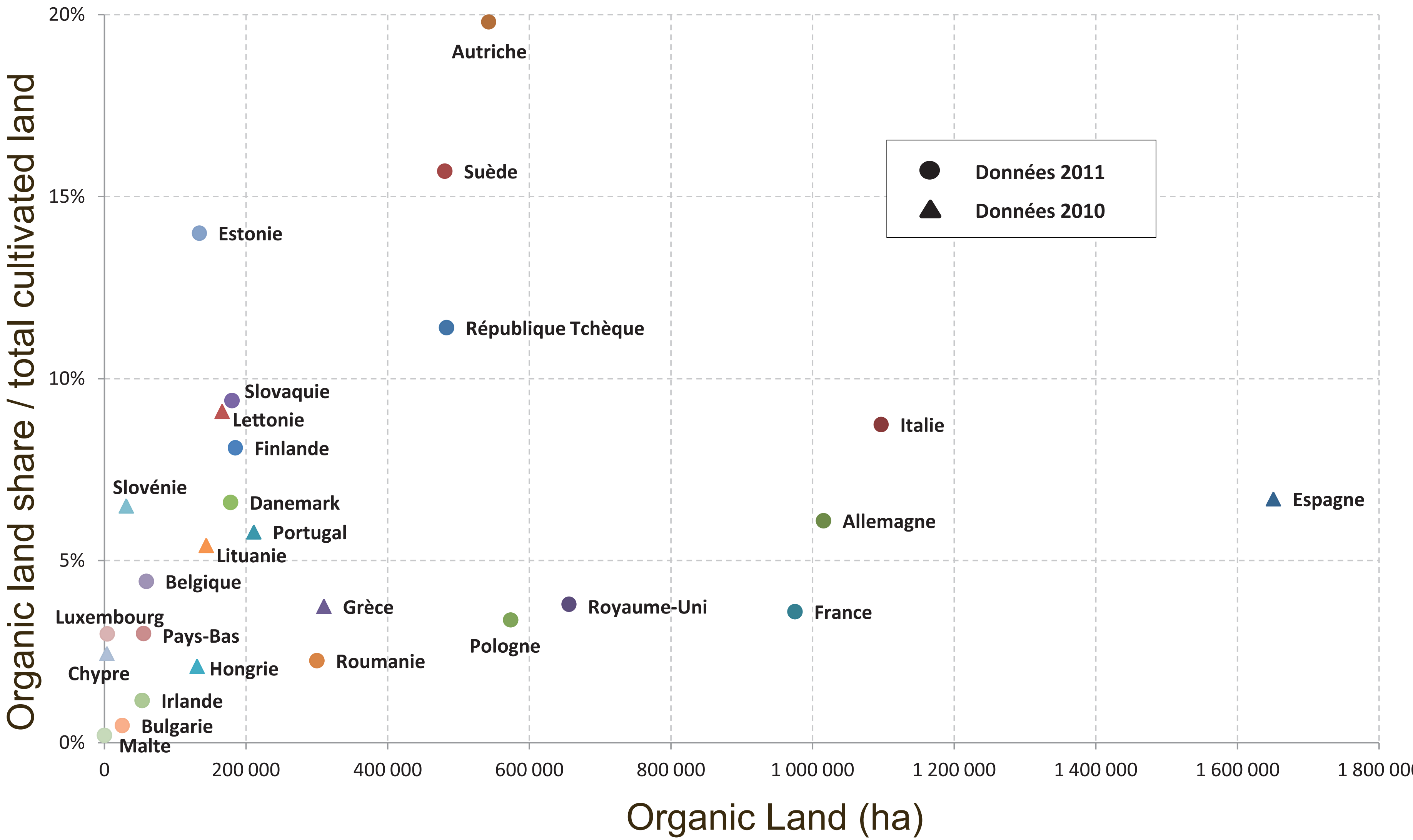
Solibam

COBRA Coordinating Organic Plant Breeding Activities for Diversity

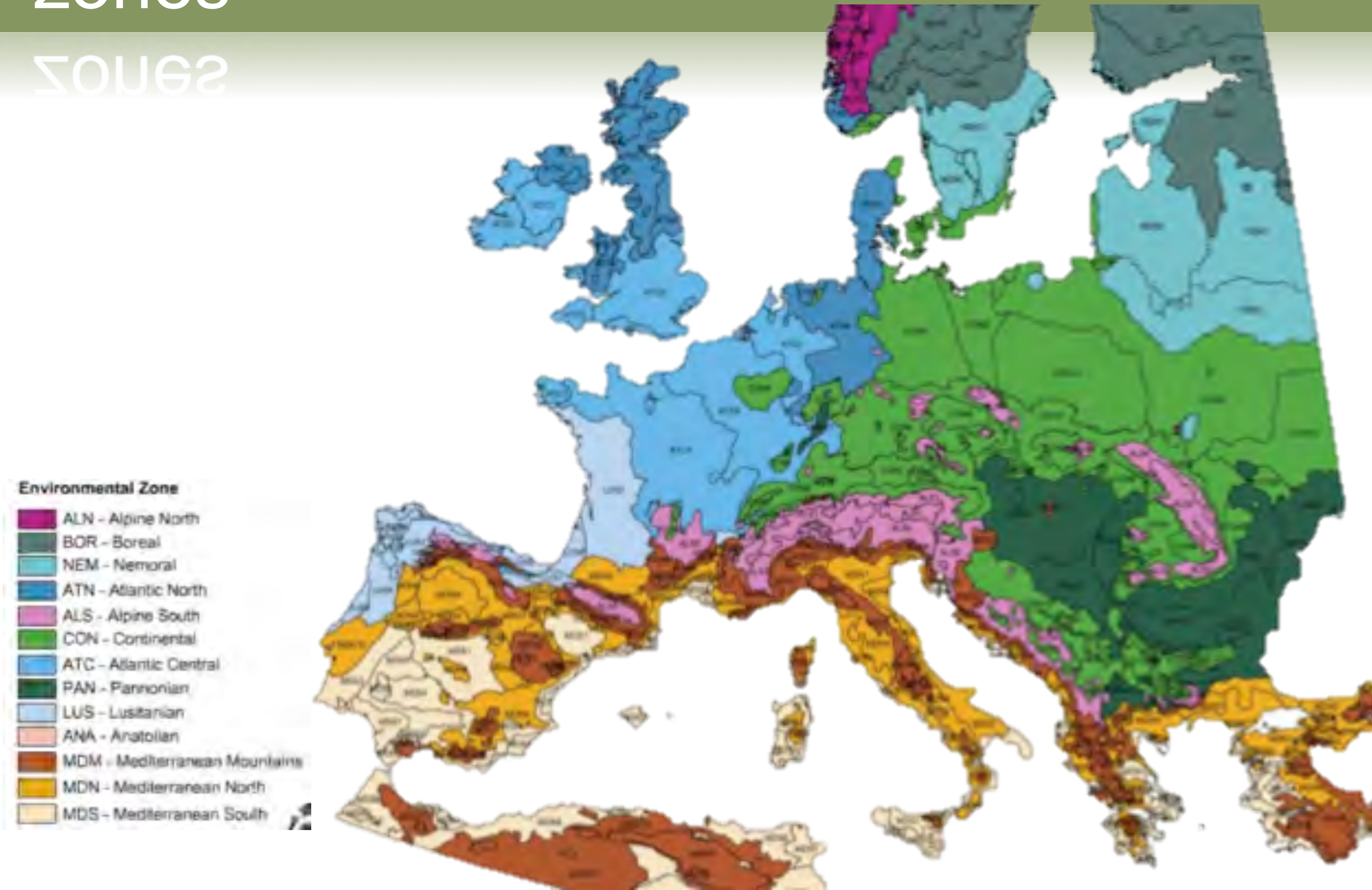
1. DIVERSE SEED EXPECTATIONS

1. Contrasting situations- OA in EU



Sources: Agence BIO from various EU sources -2012

…a wide range of agro-environmental zones

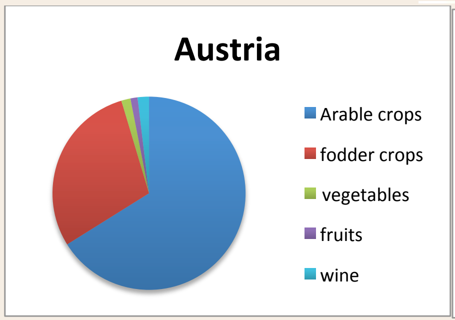


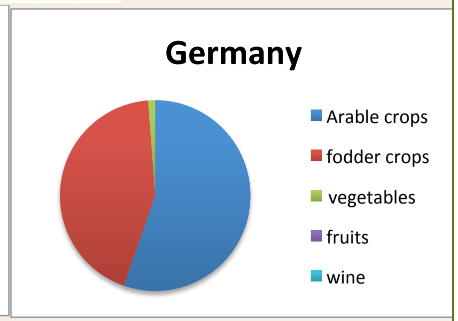
1. Contrasting situations

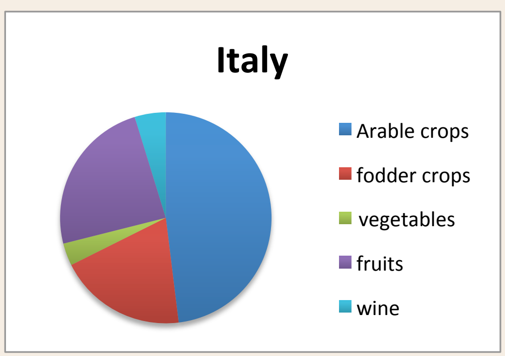
Main organic crops in some EU countries

More crop diversity

Predominance of **arable crops**







Sources: SOLIBAM-2010 data

1. Contrasting situations

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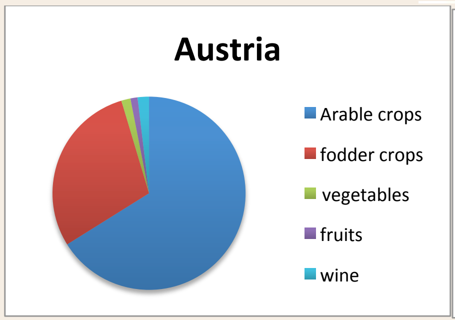
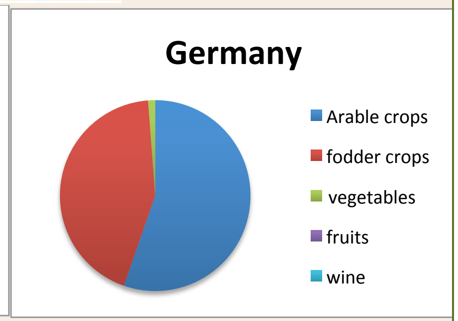
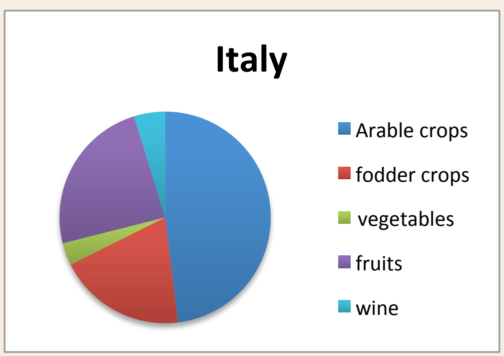
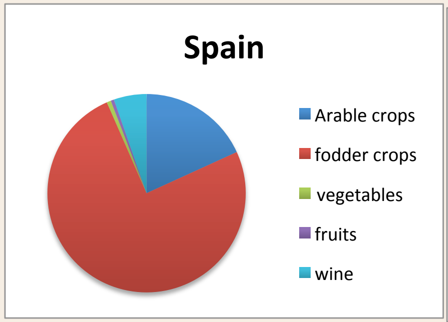
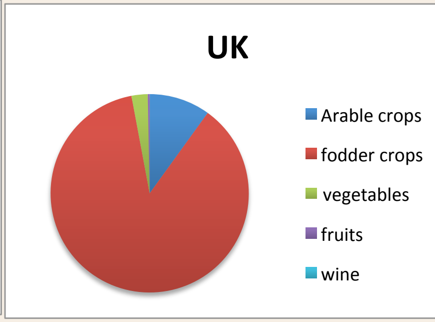


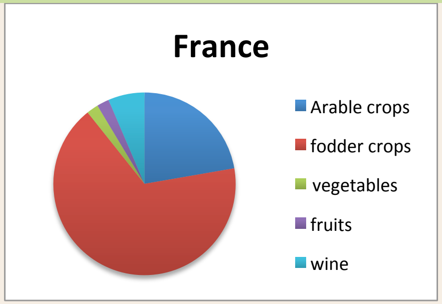


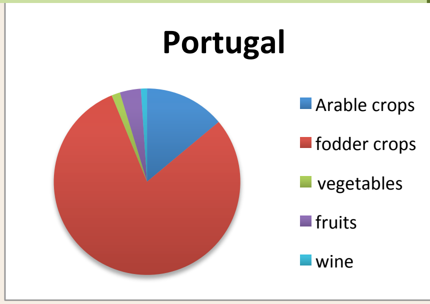


Predomance of **fodder crops**





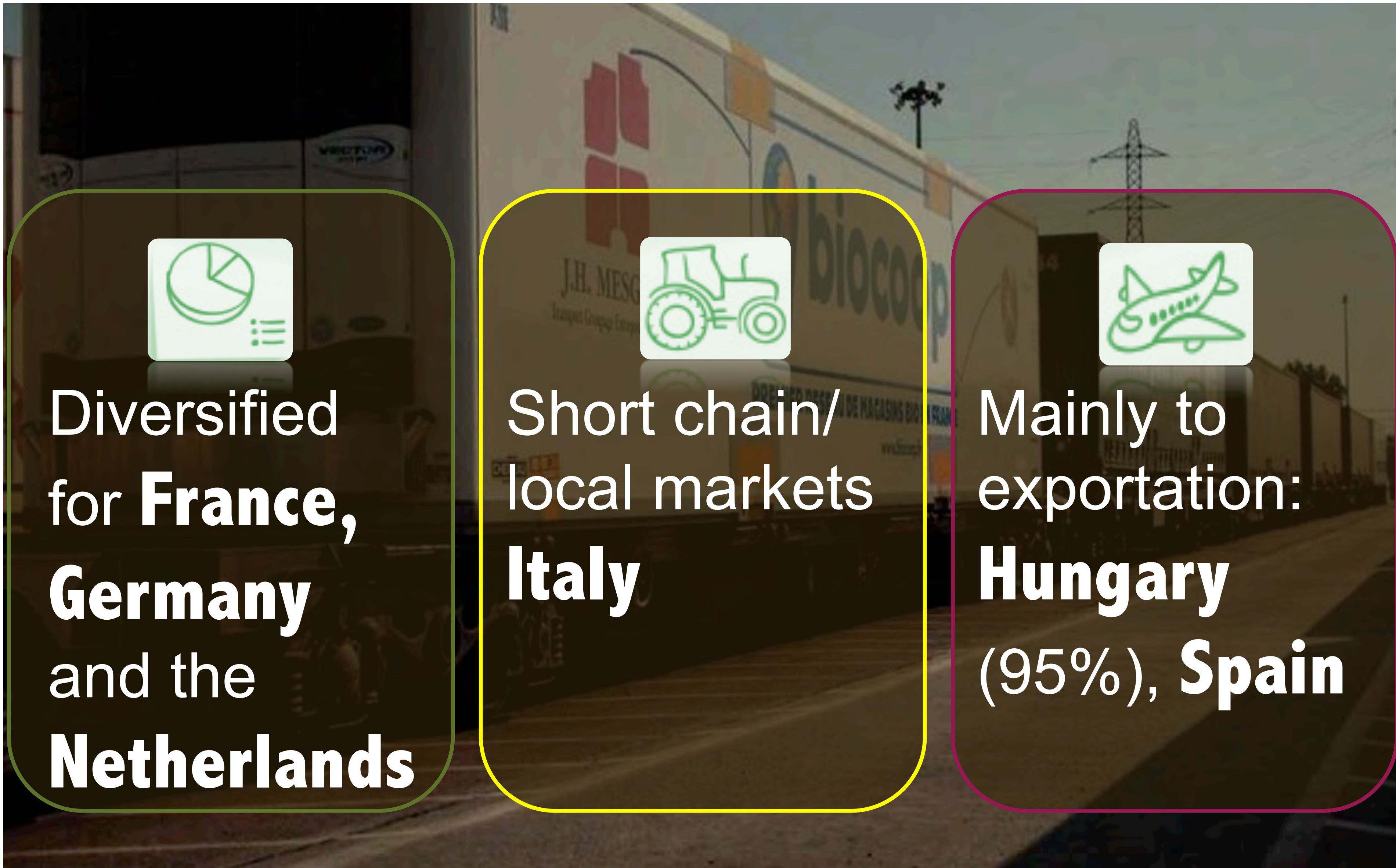




Sources: SOLIBAM-2010 data

3.1 Contrasting situations

Main distribution channels for organic products



Diversified for **France, Germany** and the **Netherlands**

Short chain/ local markets **Italy**

Mainly to exportation: **Hungary** (95%), **Spain**

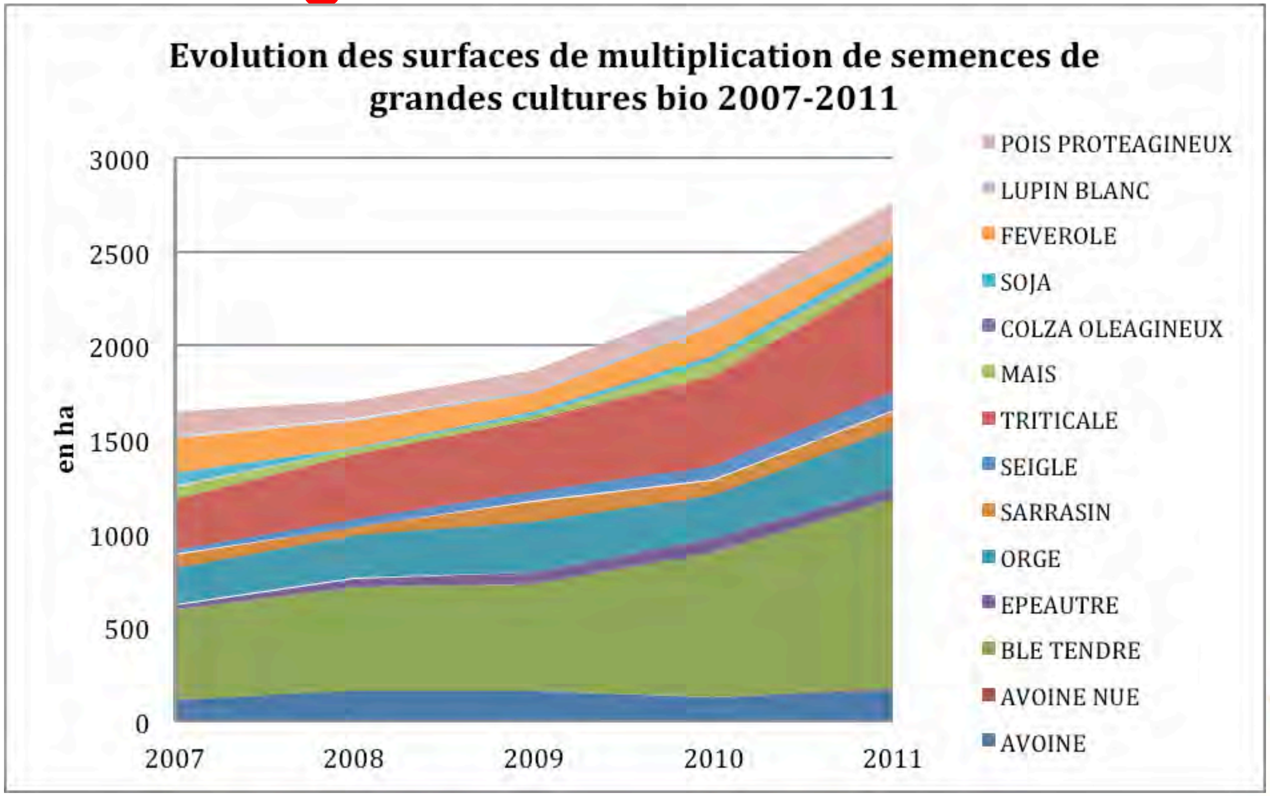
2. TRENDS IN ORGANIC SEED PROPAGATION

2. Organic Seed Production

Trends in areas devoted to organic seed propagation

in France (Gnis-Coop de France, 2011)

+ 84% growth



tons

2 Organic Seed Production

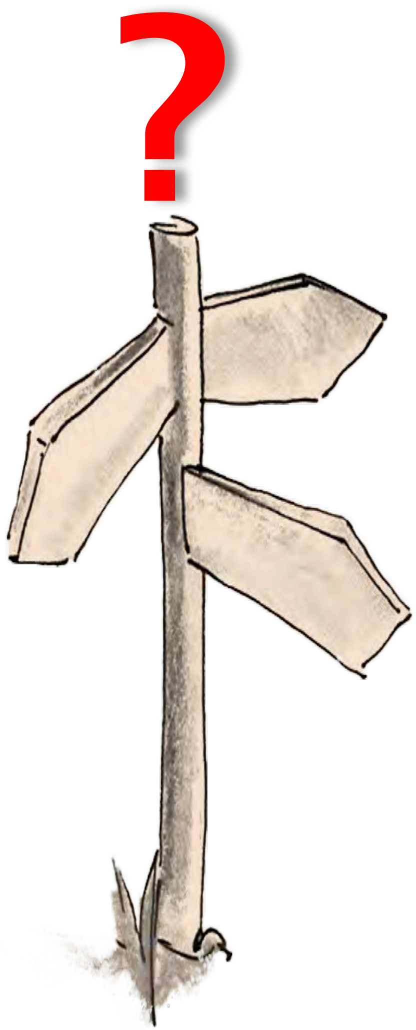
Yields **for organic seed multiplication** in France (Gnis-2008, 2011)

	harvested area (ha)	Yield (t)	organic/ conventional
Barley	756	3,3	51%
Wheat	1740	3,1	44%
Maize	172	1,7	48%
Faba beans	467	2,6	52%

3. SURVEY: PRELIMINARY RESULTS

Organic seed propagation and plant breeding

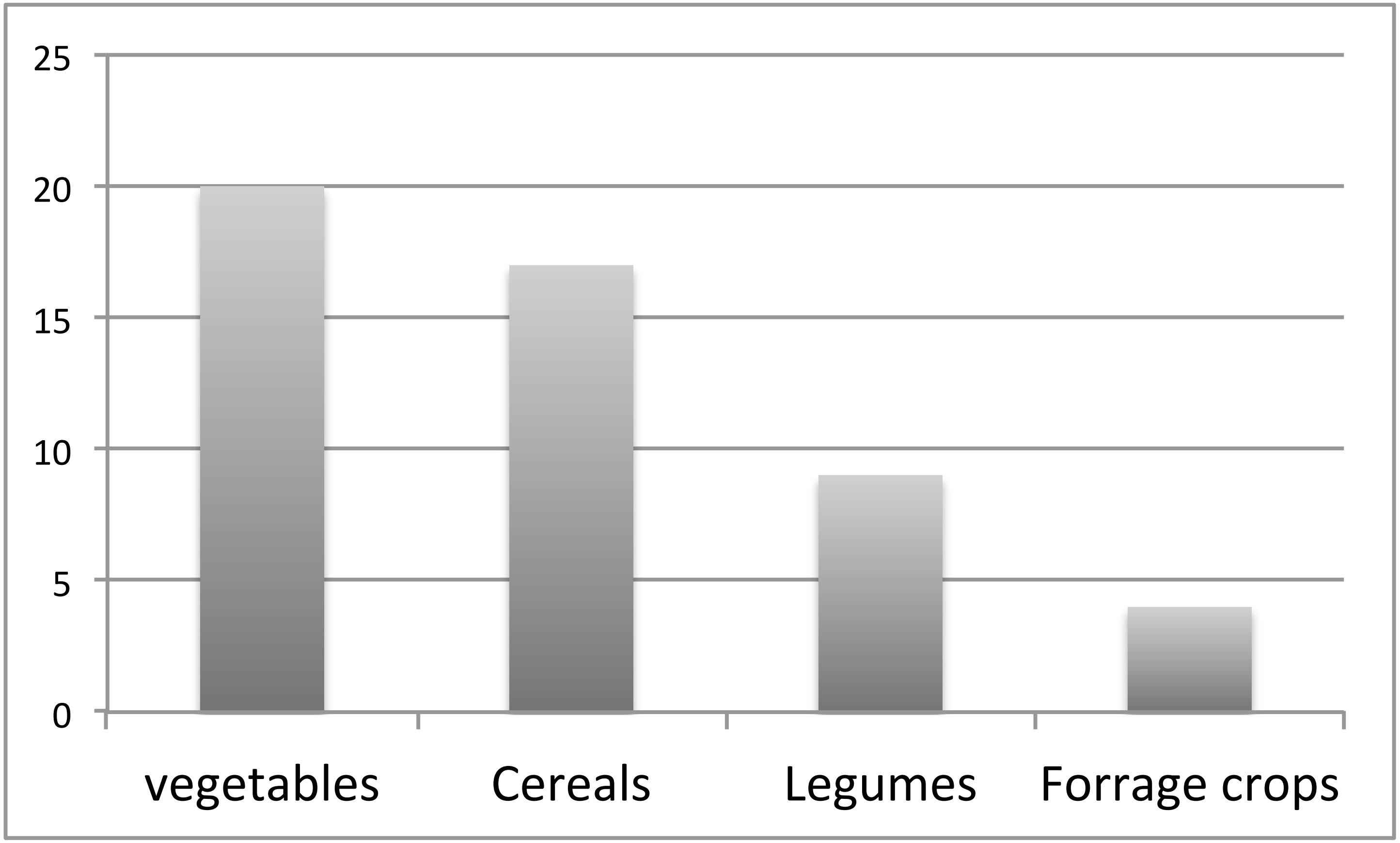
CONTRIBUTIONS



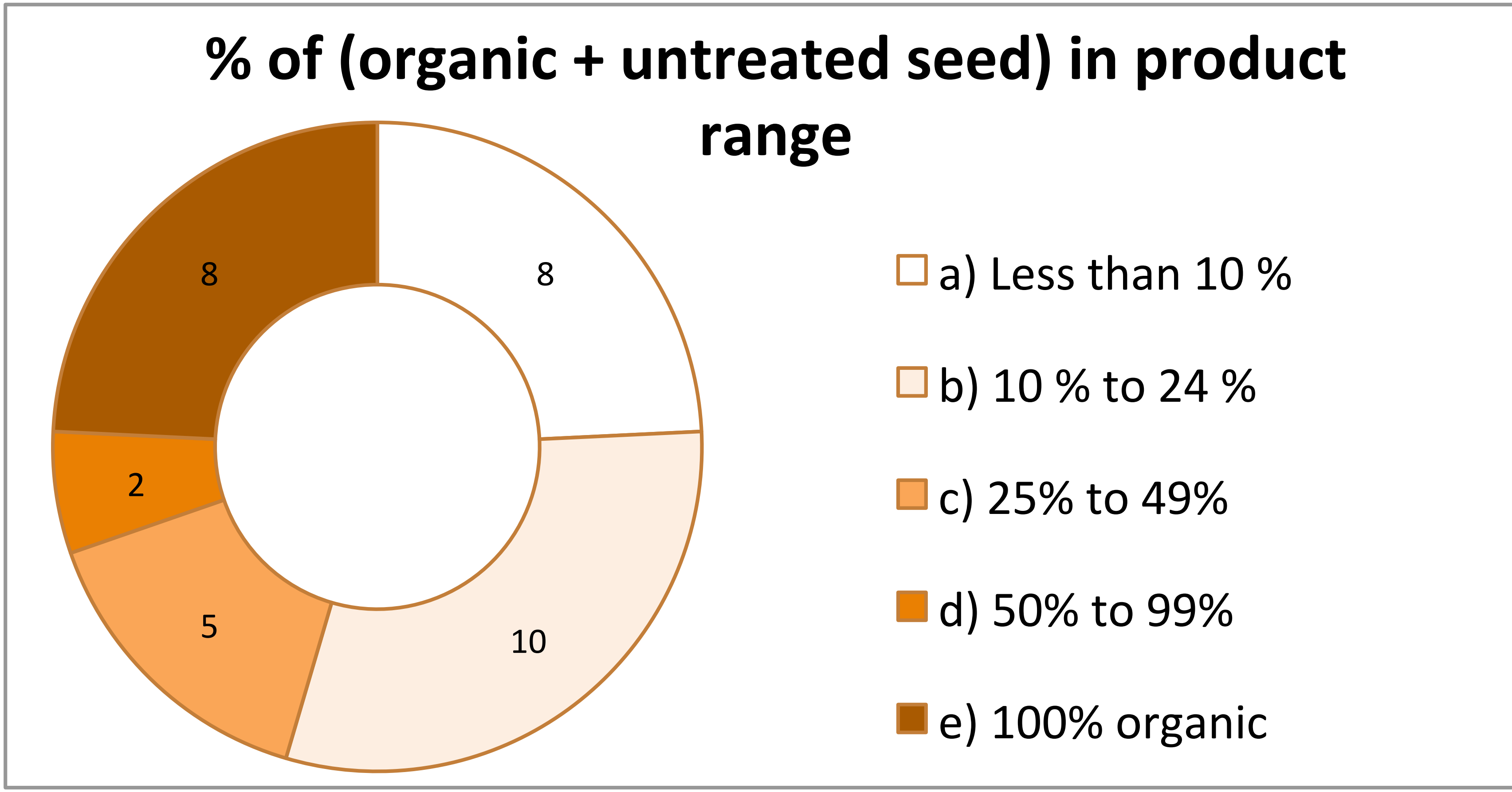
Country	contributors (nbr.)
UK	10
France	7
The Netherlands	6
Austria	3
Denmark	2
Switzerland	2
Germany	1
Latvia	1
Spain	1
Total	33

33 CONTRIBUTIONS

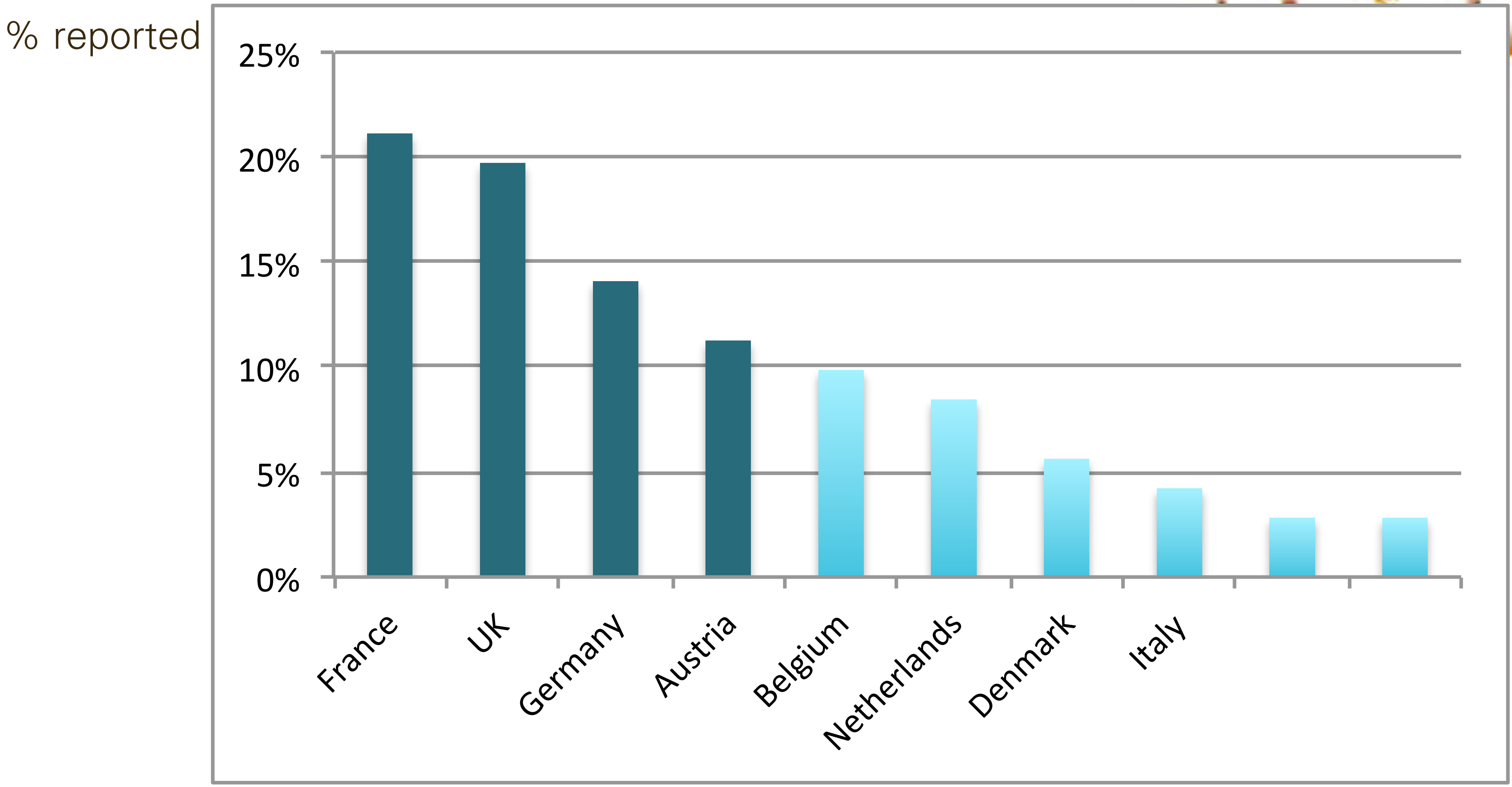
Number of seed companies involved in the sector



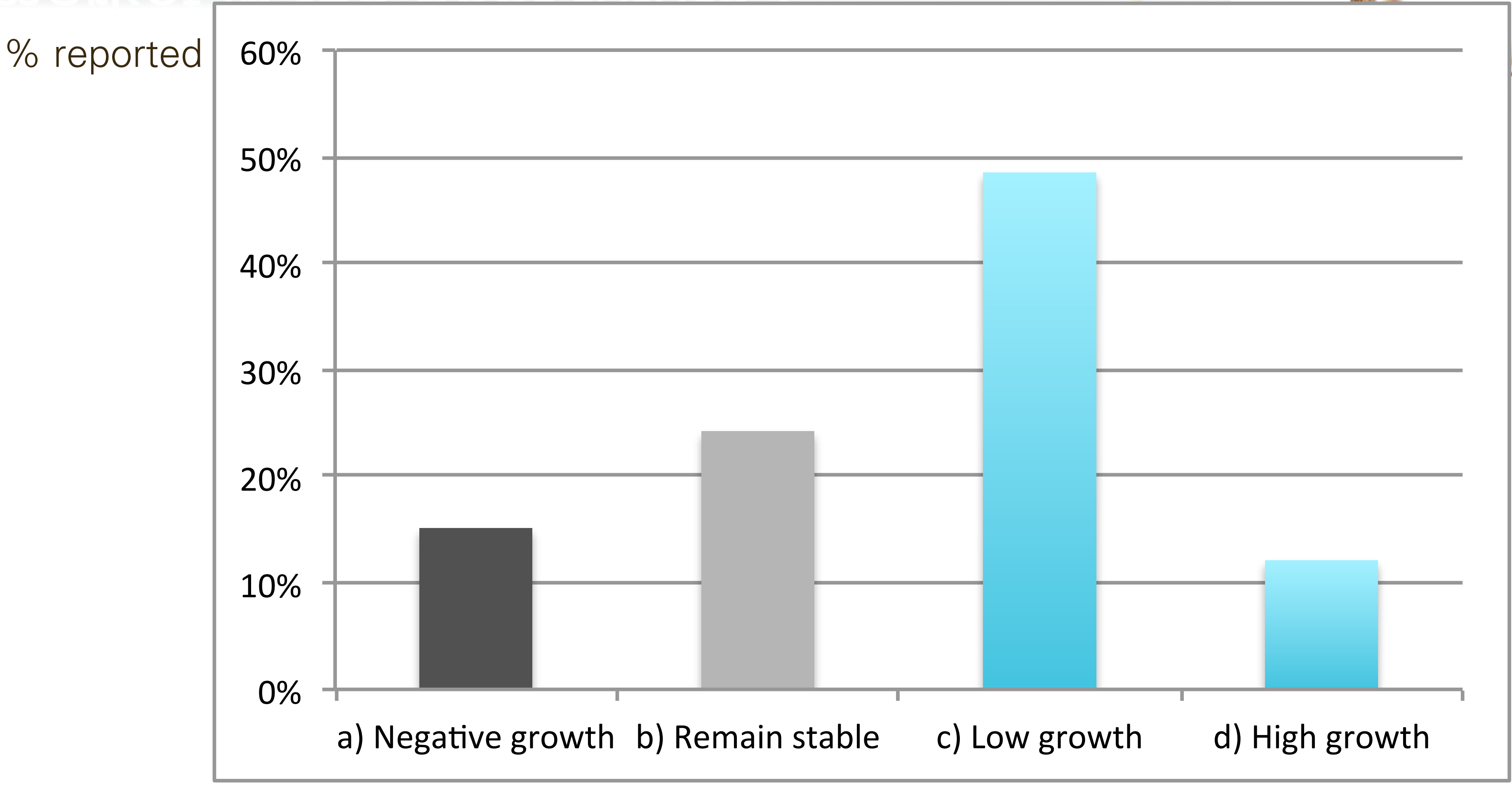
33 CONTRIBUTIONS



organic seed sales increased in…

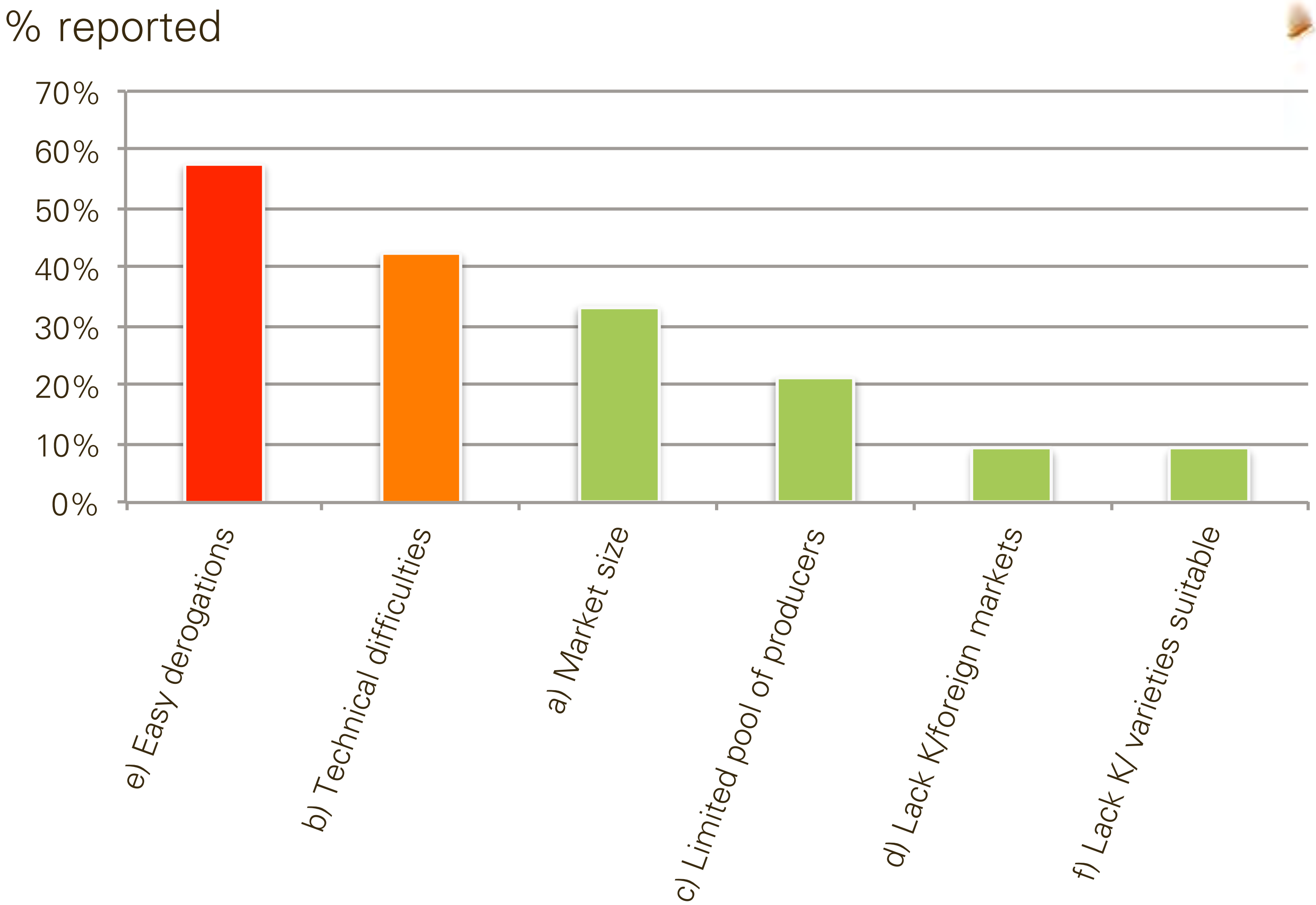


A positive growth of the organic seed market in the near future?



Based on 33 contributions

Main limiting factors: derogations, technical difficulties and market size…

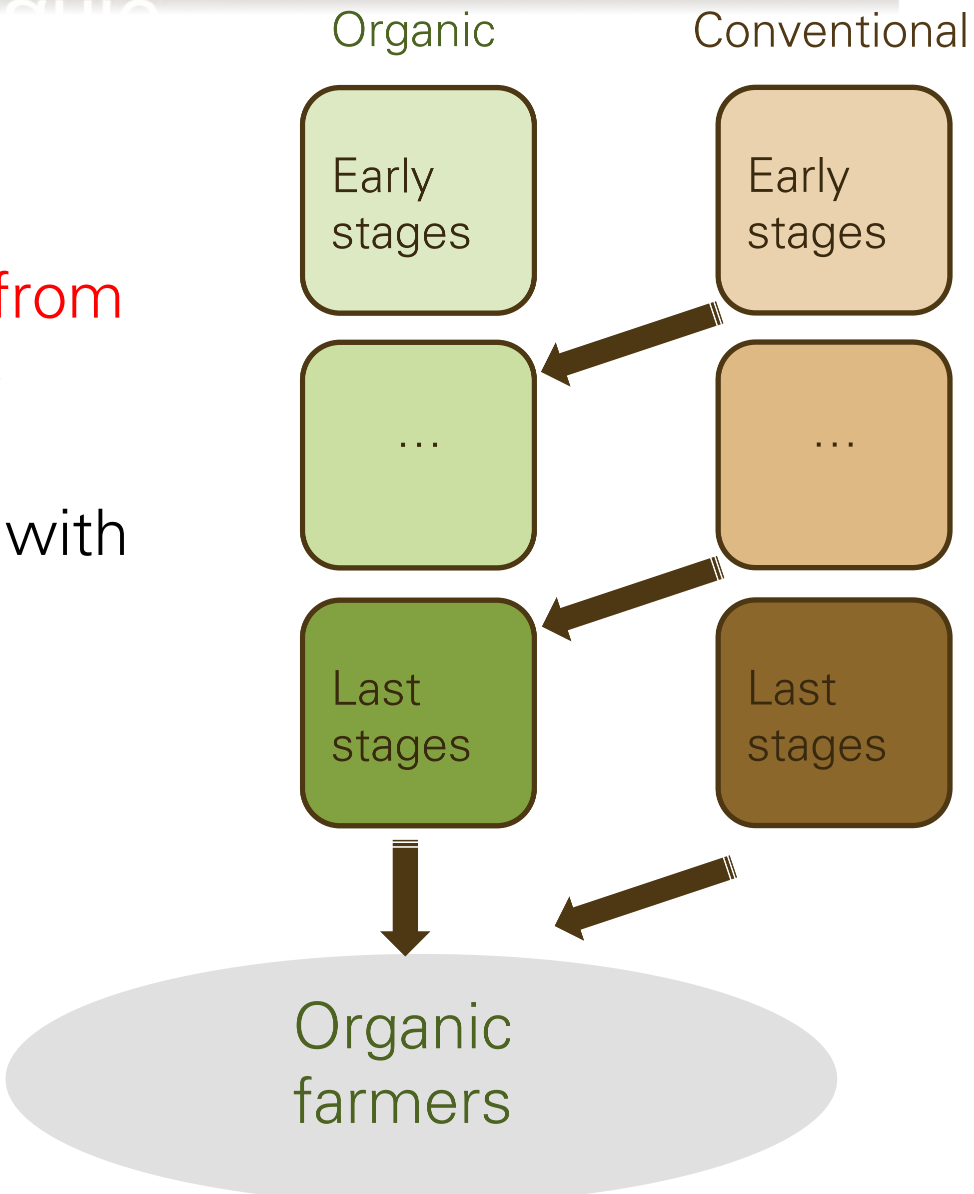


Based on 33 contributions

Breeding for organic

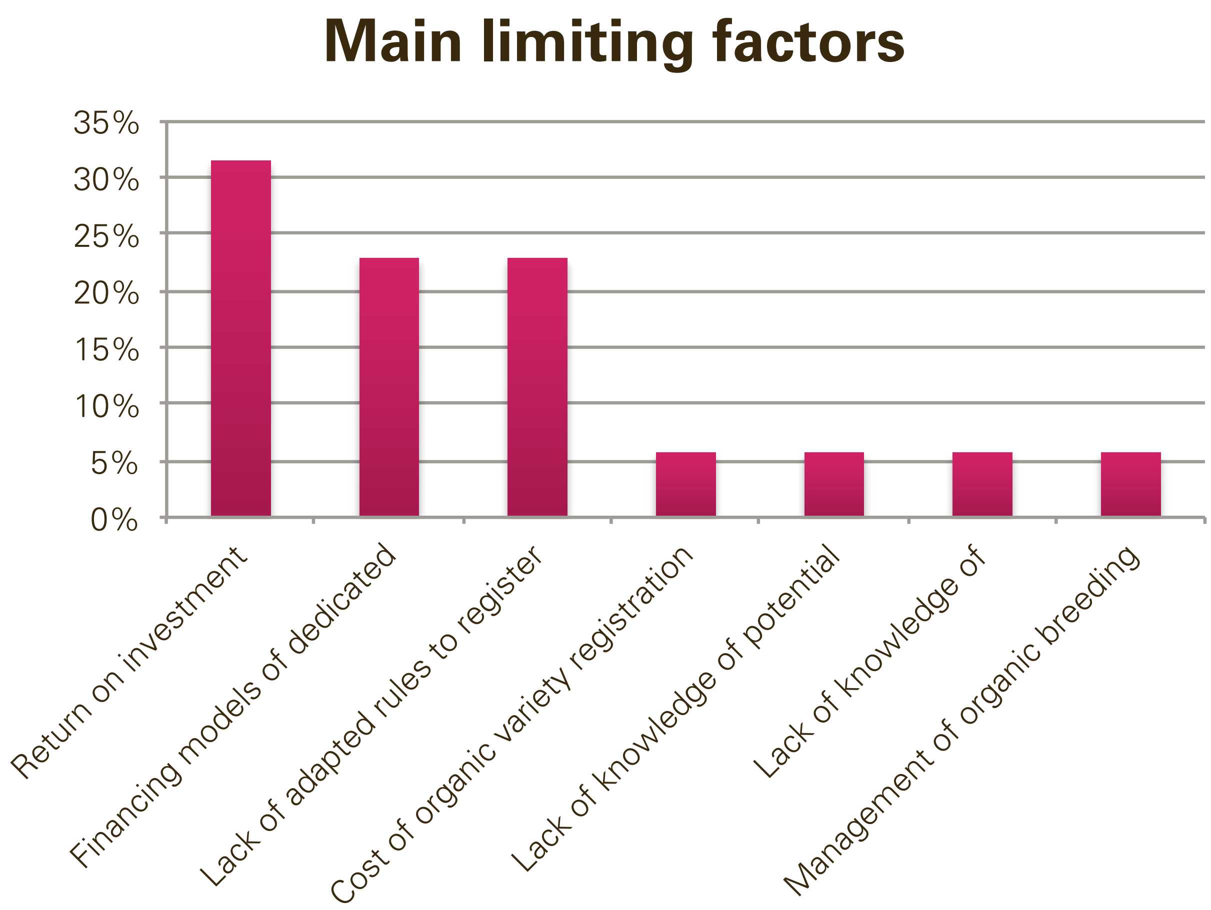
Various strategies:

- **8** companies are developing organic breeding program from the begining to the end.
- **6** start in common with conventional
- **3** don't make separation



Breeding for organic, limiting factors

Economic reasons for **54%**

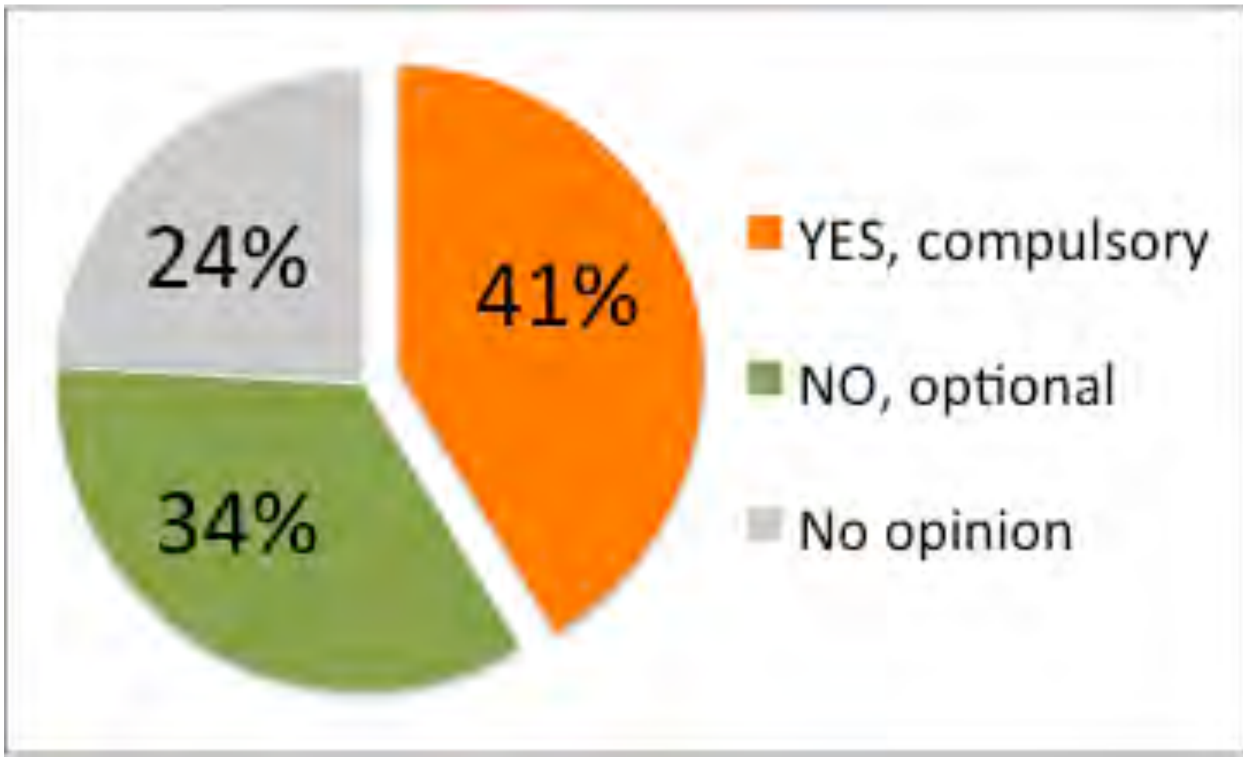


Organic plant breeding certification

…several seed companies would be interested in a formal certification (9)

European seed regulation

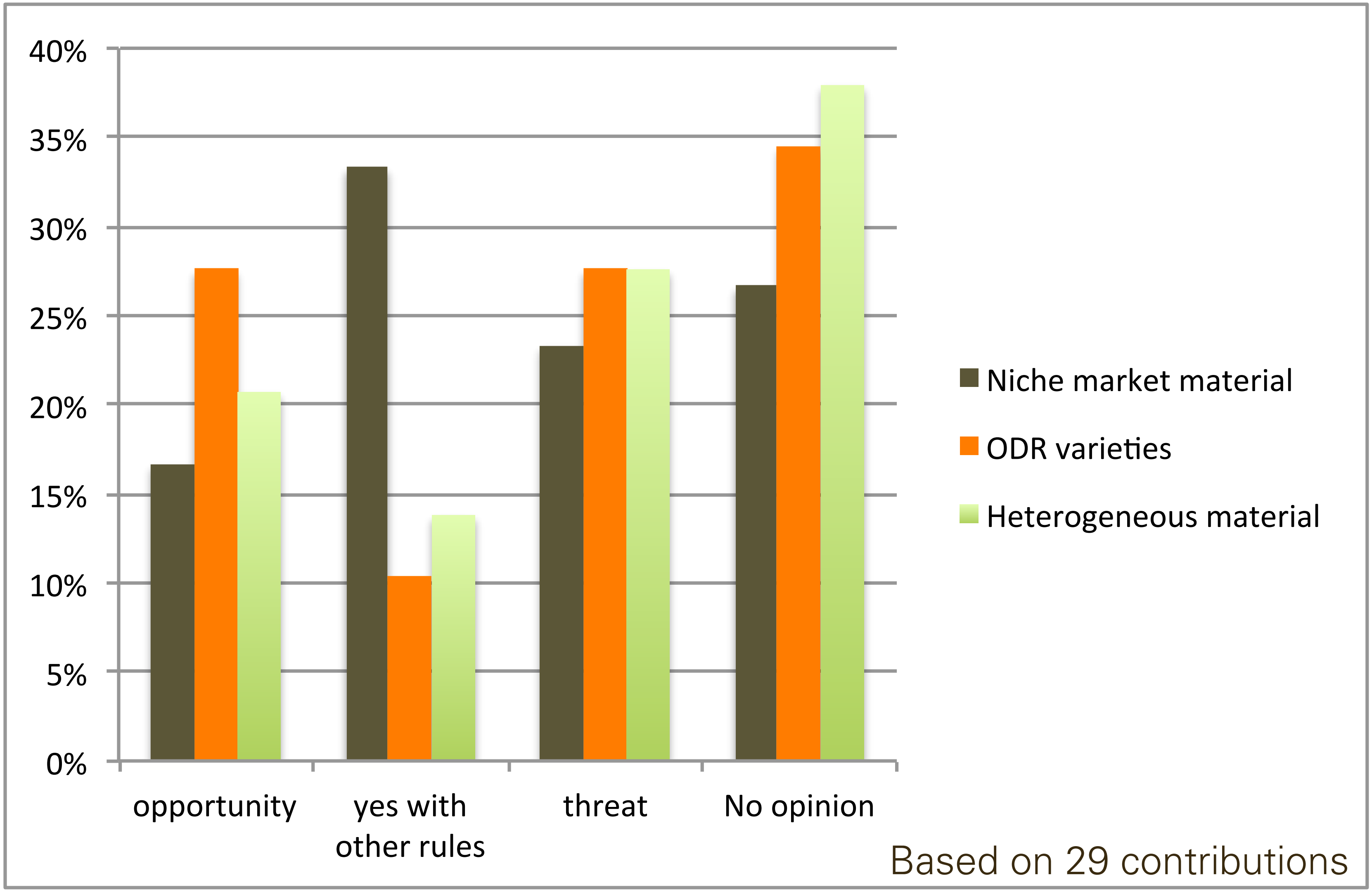
VCU testing for varieties dedicated to OA, should remain compulsory?



Based on 29 contributions

European seed regulation

New seed categories (EC proposal May 2013)



CONCLUSION

diverse expectations

- Context of the farm (agro-ecological, distribution channels)
- The development of the organic sector
- Diversity, an organic principle

provide

purchase

organic seed regulation

organic seed prod.

- Positive market growth (e.g. France, UK, Germany, Austria)
- Limiting factors: **derogations,** technical difficulties

support

suited var.

plant breeding for OA

- Several ongoing programmes
- Limiting factors: **$$$** (return on invest. / financing) + **adapted rules** for variety registration

Contributors

Saatzucht LFS Edelhof
Saatzucht Donau GesmbH&CoKG
Esporus
State Stende Cereal Breeding Institute
Saatzucht Gleisdorf
Rijk Zwaan
Agrolocica
Sejet Planteforædling
Bejo Zaden
CARNEAU
Cope Seeds Ltd
Sativa Rheinau AG
Bingenheimer Saatgut AG
Skea Organics Ltd
Vitalis Biologische Zaden B.V.
Cotswold Seeds Ltd
Stormy Hall Seeds
Pearce Seeds
Dalton Seeds
Bejo France
Moles Seeds
Agrico
Robin Appel Ltd
SA PINAULT
Otto Hauenstein Samen AG
AGROSEMENS
IAR Agri Ltd
Vitalis
De Bolster
Graines voltz
OBS
Innoseeds
Field Options Ltd

Thank you