ORC Factsheet no. 4 - January 2021

BUSINESS & MARKETS

# Organic seed use in the EU

## A survey of organic farmers from across Europe


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**ORC ACKNOWLEDGEMENTS**
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**YEAR**
2017-2021

**FUNDING - PROJECT**
**EU Horizon 2020**
- LIVESEED

## Abstract

Organic farming endeavours to be a closed-loop system, as such the new European Organic Regulation 2018/848 aims to make the organic sector more independent from conventional agriculture. There is a planned phasing out of derogations for the use of untreated conventional seed by 2036, i.e., seed that has been produced within conventional farming systems but has not received any chemical seed treatments. The phasing out is in line with the principles of organic agriculture, in particular with the idea that only organic inputs should be used. However, at present, the use of organic seed is limited. How realistic is this target and what factors drive seed choice across Europe at present?

The Organic Research Centre, as a partner in the EU Horizon 2020 LIVESEED project, led a survey of 763 organic farmers in Europe, to identify the factors currently affecting the use of organic seed. The results of the survey reveal big challenges to the achievement of the goal of 100 % organic seed use in organic farming. Significant differences in organic seed use were found across different groups of farms: between farms operating in 'alternative' and 'mainstream' food supply chains, between smaller and larger farms, between established and more recently converted organic farms, and finally between farms located in different geographical regions.

In addition, farmers claimed a lack of availability of organic seed for a wide range of varieties they need to use to match the different agri-environmental conditions throughout Europe. This is a critical issue which needs to be addressed to allow all European farmers to pursue the inter- and intra-species diversity required in organic farming.


## Introduction

The new European Organic Regulation 2018/848[1] that will enter into force in 2022 has announced the phasing out of derogations for the use of untreated non-organic seed in the EU organic agriculture by 2036. In fact, the current Regulation 834/2007 still allows the use of untreated non-organic seed through derogations where no organic seed is available. So far, however, the use of organic seed is limited.

The Organic Research Centre, as a partner in the EU Horizon 2020 project LIVESEED 'Boosting organic seed and plant breeding across Europe', has led a survey to understand the factors that are currently affecting the use - or not - of organic seed by farmers.

## MAIN RESULTS

The survey was conducted in 2018-2019 with a network sample of 763 organic farmers in 17 European countries, which yielded the following results[2].

- Organic seed use is not consistent across European regions: farmers in Central Europe, the region where most organic seed production takes place, use more organic seed than farmers in the other geographical regions, in particular Eastern and Southern Europe.

- As far as production orientation is concerned, organic seed use is highest in the vegetable sector, followed by arable, the forage and, last, the fruit sector. As shown in **Figure 1**, differences in organic seed use are statistically significant between the vegetable and forage (livestock) sectors, and between the fruit sector and the arable and vegetable sectors.

- Organic seed is mainly used by farms operating in short and specialised supply chains. In fact, farmers that sell their production directly to consumers, farmers markets, organic shops, use more organic seed than farmers in the mainstream food chains selling to supermarkets.

- The share of organic seed used on farm decreases as farms get larger and more recently converted.

- The main critical issue reported by the surveyed farmers was the availability of organic seed for the varieties they need, followed by seed price, whereas seed quality was not reported to be a problem.

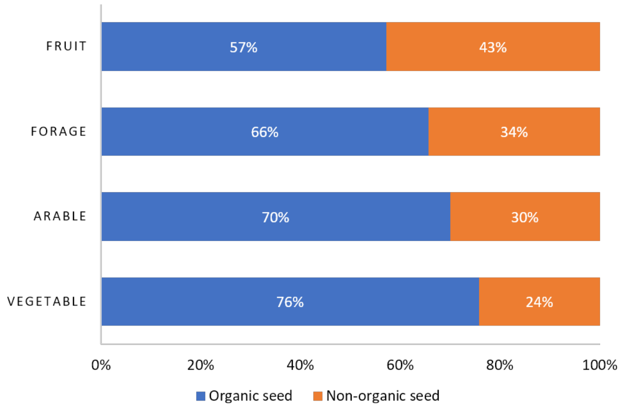


**Figure 1** Mean share of organic seed use by production orientation across the surveyed EU farms. Bars with the same letter are not significantly different (Kruskal-Wallis test)

- Across five possible actions to boost the use of organic seed in Europe, the ones perceived as most important by most farmers were "*Improve availability of organic seed for locally adapted varieties*" and "*More effort to breeding programmes for organic farming*" (**Figure 2**).

Overall, organic farms use a relatively low proportion of organic seed unless they are part of short and specialised organic supply chains. As more farms in Europe convert to organic farming, barriers to organic seed use by the recently converted generation of organic farmers must be identified and overcome. This is especially true considering that in the Farm to Fork and Biodiversity strategies published by the European Commission, organic agriculture is put at the heart of a transition towards sustainable food systems, with a target to reach at least 25 % of agricultural land under organic farming on average in the EU by 2030[3,4].

## Conclusion

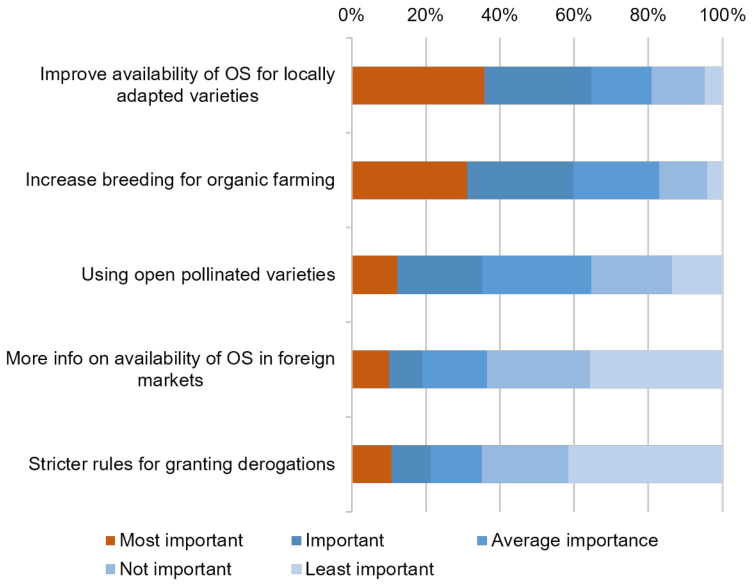


**Figure 2** Actions to boost organic seed use: percentage of farmers classifying each action as most important

Given the current situation, a 100 % organic seed use by 2036 as set out in the new Organic Regulation appears to be challenging unless the issue is more widely addressed.

Whilst the harmonisation of the implementing rules and the organic seed market in Europe remains a fundamental goal for the sector, the first condition for the sustainability of organic agriculture is to ensure availability of a wide range of varieties and species suitable to different agri-environmental conditions to allow all European farmers to pursue the intra- and inter-species diversity required in organic farming. Also see: Factsheet no. 2 "Farm-based organic variety trials" and Factsheet no. 3 "(R)evolutionary wheat populations". To improve the availability of organic seed, seed companies throughout Europe need to invest in organic seed multiplication. ORC is leading further work within the LIVESEED project to investigate if competitive business models exist and what they should look like so that supply can meet farmers' demand.

## References

1. Regulation (EU) 2018/848 : eur-lex.europa.eu/eli/reg/2018/848/oj
2. Orsini S *et al.* (2020) doi.org/10.3390/su12208540
3. European Commission (2020) Farm to Fork Strategy: tinyurl.com/y3ro3fcg
4. European Commission (2020) EU Biodiversity Strategy for 2030: tinyurl.com/yyae5hc9
5. LIVESEED project website: liveseed.eu

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