Key outcomes of the Seed supplier and breeder survey on the organic seed and breeding sector in Europe

In 2018, Seed supplier and breeder survey on the organic seed and breeding sector in Europe was conducted as part of the LIVESEED project. Survey was completed by **210 respondents** from **30 European countries.**

Main aspects of the survey:

- turnover from seed sales & percentage of turnover from organic seed
- development of organic seed sales over the past five years
- organic seed production restrictions
- national databases in which organic seed offers are listed

Main outcomes:

- most organic seed production and seed sales are conducted in **Central European countries** (France, Germany, the Netherlands, Belgium, Austria, Luxemburg and Switzerland)
- **169 respondents working with organic seed** - 99 seed companies indicated that the **turnover from organic seed** accounts just for **1-10 %**
- positive trend of changes in turnover from organic seed in the past 3-5 years – **increasement of organic seed sales**
- only **10 %** of all respondents are exclusively involved in **organic breeding**
- databases of Central EU countries are the most frequently used databases in Europe
- **low level of database entries in foreign databases** → language barriers and administrative burdens
- **large differences** in how far the organic seed production and breeding are developed **in the different EU regions**
- **supply-demand paradox** → seed suppliers question if demand justifies scaling up production, while farmers find the supply of organic seed and reproductive material insufficient
- **more research needed** in organic breeding and seed production
- technical challenges in organic seed production (yield losses/volatility and infections with seed-born pests and diseases) may lead to **higher costs of organic seed production** in comparison to conventional seed production
- interventions to initiate and **foster entrepreneurship** in the organic seed sector

Regarding the past developments in changes in turnover and the planned investments it becomes clear, that the ***organic seed and breeding sector is constantly growing***, and many respondents plan to increase their investments.

TURNOVER FROM ORGANIC SEED SALE

41 respondents indicated 0 % turnover from organic seed (conventional seed trade only)

38 respondents indicated 81-100 % turnover from organic seed

ORGANIC SEED PRODUCTION

56 producers in the Northern EU countries
34 producers in the Eastern EU countries
113 producers in the Central EU countries
61 producers in the Southern EU countries
19 producers in countries outside of the EU

ORGANIC SEED PRODUCTION RESTRICTIONS

113 producers indicated they have encountered restrictions

organic seed derived from organic bred varieties have slightly less health problems (72.2 %) than organic seed derived from conventionally bred varieties (78.9 %)

ORGANIC SEED TRADE

78 % of respondents that only operate with conventional seed are interested in organic seed trade
unsecure market situation, low organic seed demand & derogation system - the main reasons holding them back
arable crops (85 %) - major interest to start organic seed trade