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MINUTES of the
Meeting of the Civil Dialogue Group on Agricultural Markets – COP & Seeds
5 March 2024

Chair: AGRI E.4

CDG Cereals, Oilseeds, Protein Crops

1. Adoption of the agenda

The agenda was approved.

2. Nature of the meeting

The meeting was non-public.

3. List of points discussed

Overview of the market situation

World cereals market

World wheat harvest is now finished for the 2023/24 crop year. The International Grains Council (IGC) estimates production at 788.0 million tonnes (-1.9% y/y), the 2nd largest on record. The Russian crop was raised by 1.0m m/m to 91.0 million tonnes (-4.6% y/y). Despite a minor monthly reduction, wheat consumption is forecast at a new peak of 803.1 million tonnes (+1.0% y/y), incl. 553.3 million tonnes (+0.9%) of food use and 155.0 million tonnes (+3.4% y/y) for feeding. In the case of food use the annual increase is supported by population growth, while for feeding by the larger share of lower grades during last harvest in some of the major producers. Closing stocks are placed at a five-year low of 264.9 million tonnes (-0.7m m/m; -5.4% y/y), including a below-average 59.8 million tonnes (-8.0% y/y) in the eight major exporters.

IGC lifted its forecast for world trade in 2023/24 (July/June) to 199.6 million tonnes (-3.8% from last season's record y/y). Russian exports were raised to a new peak of 50.3 million tonnes (+4.6% y/y) and Ukrainian shipments are now placed at 15.5 million tonnes (+1.5m m/m; -9.4% y/y). EU outlook steady m/m at 32.5 million tonnes (-1.8% y/y). EU import forecast increased further to 10.0 million tonnes (+1.5m m/m; -19.3% y/y) in view of sustained demand for competitively priced Ukrainian supplies. Based on strong arrivals from Russia, imports by Iran were raised by 0.5m m/m to 4.0 million tonnes (+14.3% y/y).

Outlook for 2024/25: partly due to lower prices, world harvested wheat area is projected to decrease by 0.7% y/y to 221.6 million ha, incl. EU area at 23.3 million ha (-2.6%), Ukraine at 6.0 million ha (-5.0%), Russia at 28.2 million ha (-2.7%) and US at 15.6 million ha (+3.5%). Production is tentatively projected to increase by 1% to 799 million tonnes, while consumption to reach a new peak at 804 million tonnes.

Concerning maize, led by record harvests in China and the US, IGC forecasts world production at a new peak of 1,233.7 million tonnes (+6.1% y/y). Ample supplies at affordable prices will boost consumption to an all-time high of 1,222.0 million tonnes (+4.0% y/y), incl. 732.3 million tonnes of feed use (+4.7% y/y) and 311.6 million tonnes of industrial use (2.8%). Driven by a strong accumulation in the US, global ending stocks are expected to increase to 286.3 million tonnes (+4.3%), with combined Chinese and US stocks (229.9m t) representing 80% of world total.

Based on final USDA estimates, the US crop was lifted by 2.7m to a record 389.7 million tonnes (+12.4% y/y) with the yield also seen at a new peak. Forecasts are unchanged m/m for Argentina (61.0m t; +47.3%) and Brazil (119.7m t; -9.3%), where harvests are far to be completed. World trade (July/June) is forecast to decline for the third consecutive year reaching 177.3 million tonnes (+1.3 m m/m; -2.4 m t or -1.4% y/y). US is expected to be the main exporter (52.4 m t; +15.8% y/y), followed by Brazil (48.0 m t; -1.2% y/y), while Ukrainian shipments are placed at 19.5m t (-33.5% y/y). The EU will remain the leading importer (21.7m t; -26.4% y/y).

Preliminary prospects for 2024/25: world harvested area is projected fractionally larger y/y at 205.8 million ha (+0.4%), incl. EU at 8.8 million ha (+4.2%) and Ukraine at 4.0 million (-1.4%). The potential decrease in the US reflects more favourable price patterns for soya bean over maize. Assuming normal weather and trend yields, production could potentially increase by 1% to a new peak, while consumption is also expected to rise next season on expectation of large supplies and attractive pricing for key origins.

Following the introduction of a grain export quota of 24.0 million tonnes for the period of 15 February – 30 June, the Russian Agricultural Ministry proposed to increase the export quota by 4.0 million to 28.0 million tonnes. According to press reports, the unofficial fob export threshold price was lowered to USD 235 per tonne. Russian exporters are expected by the government not to make offers below this price at international tenders.

According to first preliminary projections of the USDA, 2024/25 wheat production could increase moderately in the US reaching 51.7 million tonnes (+4.9% y/y), while maize output is tentatively placed at 382.0 million tonnes, down 2.0% from the record harvest of 2023/24.

As of 26 February, Ukrainian grain exports in 2023/24 (Jul/Jun) are estimated at 28.6 million tonnes (-3.2m t y/y), including 11.3 million tonnes of wheat (+0.1m t), 15.4 million tonnes of maize (-2.8m t) and 1.6 million tonnes of barley (-0.4m t). Russian wheat exports accelerated lately, and local analyst SovEcon, forecasts wheat exports to reach 3.8 million tonnes in February, 1.2 million tonnes above the recent average for this month. Total Russian grain exports in MY 2023/24 are forecast at 62.7 million tonnes, including a record 48.6 million tonnes of wheat and 5.9 million tonnes of barley.

Reflecting unfavourable growing conditions and reduced area forecasts, the official Brazilian maize production forecast was cut by 3.9m t to 113.7 million tonnes (-13.8% y/y) in 2023/24. The total includes 23.6 million tonnes (-13.8% y/y) for the first and 88.1 million tonnes (-13.9%) for the second (safrinha) crop. Exports are expected to fall sharply to 32.0 million tonnes (-3.0m m/m and -23.5m t) in marketing year 2024/25 (March/Febr). Planting of the first maize crop has been completed, while its harvest advanced to 25% done. Sowing of the second (safrinha) maize crop progressed to 59% finished.

Export competition continued to be particularly strong on both the wheat and maize markets with Russia dominating price movements for wheat. As for maize, supplies are tightening in Brazil, however remain ample both for the US and Ukraine, while harvest prospects are very positive for Argentina.

Wheat price for FR Rouen (fob export) decreased by nearly USD 20 to slightly above USD 220 per tonne, while RO Constanta is quoted at USD 220 per tonne or even lower for later deliveries. Russian milling wheat prices fell sharply to USD close to 210 per tonne (-USD 30). US wheat prices decreased more moderately, with the US Soft Red Winter wheat easing to USD 251 per tonne (- USD 5) and the Hard Red Winter wheat down USD 5 to USD 275 per tonne.

Maize prices (fob export) continued to decline considerably for all key origins reflecting ample global supplies, incl. a strong recovery in Argentina and fluid trade flow from Ukraine. US Gulf price fell by USD 20 to USD 185 per tonne, while Brazil declined sharply to around USD 184 per tonne (-USD 40). Argentine maize price fell also to around USD 185 per tonne (-USD 20). Ukrainian maize fob Black Sea ports decreased by USD 10 to USD 166 per tonne, remaining the most competitive on fob basis. Maize export prices on average are about 38% lower than a year ago.

EU cereals market

Total cereals estimated of 2023/24 area is unchanged since December at 50.3 million hectares, down 1.5% year-on-year. The total EU cereals production for 2023/24 is now projected at 269.8 million tonnes, 0.8 million tonnes higher than in January. It is now 1.1% above last marketing year but 3.9% down compared to the five-year trimmed average.

Soft wheat production is projected at 125.6 million tonnes (-0.2% year-on-year, +1.1% compared to the five-year average). It is 0.3 million tonnes lower than in January.

Barley production is expected at 47.5 million tonnes (-7.6% year-on-year). It is 0.1 million tonnes higher than a month ago.

As regards maize, production forecast is unchanged at 62.3 million tonnes (+17.3% year-on-year but 9.6% lower than the five-year average).

Durum wheat production forecast is unchanged compared to the January forecast with 7 million tonnes (-6.3% year-on-year and -8.6% compared to the five-year average).

Rye production forecast is projected at 7.4 million tonnes (+2.2% year-on-year, -4.3% compared to the five-year average). This is a decrease of 0.1 million tonnes compared to January.

As regards the other items of the balance sheet, the maize import forecast was lowered by 1.5 million tonnes and the soft wheat import forecast was increased by 0.5 million tonnes.

Imports from Ukraine:

From July to December 2023, imports to Spain represent 73% of the total EU wheat imports from Ukraine and 36% of the EU maize imports from Ukraine. Italy, the Netherlands, Slovenia, and Germany are also important clients of Ukrainian maize. From 1 July to 31 December 2023 the EU imported in total 8.9 million tonnes of cereals from Ukraine with practically no imports to the MS neighbouring Ukraine.

Prices: EU cereal prices further dropped month-on-month (-3 to -8%) and remain well below their level one year ago (between -15% for durum wheat and -40% for maize and feed wheat).

Comments:

Low EU cereal prices are influenced by high exports with low prices from Russia.

A high share of the cereals of the current harvest was not of milling quality.

Due to unfavourable weather conditions in autumn 2023, the winter cereal area for the next marketing year is reduced in several Member States. Increased spring cereal area should compensate for this.

Oilseed and protein market

In February, the International Grains Council projected a higher world soya bean output for the marketing year 2023/24, reaching a record of 391 million tonnes, which is 5% increase compared to the same month in the previous year. This is nearly 18 million tonnes higher than the previous season as the favourable prospects in Argentina's production are offsetting the decline in Brazil and the US. Total consumption is expected to rise by 4% year-on-year, to a peak of 383 million tonnes, with further gains linked to biofuel production in the US and Brazil. Closing stocks are seen expanding to 65 million tonnes (up 14% year-on-year) due to softer demand. Amid 2% contraction in world demand, particularly driven by China and Argentina, the forecast for total trade is marginally lower year-on-year at 168 million tonnes.

At 88.7 million tonnes, the 2023/24 world rapeseed production remains unchanged from the previous month. However, it is 0.5 million tonnes lower than the previous season. The gains in the EU and the Black Sea region are partially offsetting the drop seen in key exporters, particularly Australia. Despite a decline in production, world consumption is anticipated to reach a record 89 million tonnes, driven by robust demand from food, feed, and biofuel markets. In the UE, uptake is expected to peak at 25 million tonnes, with minor year-on-year changes. Total stocks are projected to decrease to 7 million tonnes,

due to a drop in Australian inventories. Amid substantial carry-in stocks in China, world trade is projected to drop by 10% year-on-year, to 17 million tonnes.

Owing to larger harvests in the EU and the Black Sea region, world production of sunflower seeds for 2023/24 season is projected to reach a new peak of 58 million tonnes (3% increase compared to the previous season). Amid expanded output, total consumption is expected to rise to 58.3 million tonnes, which is 1.3% higher than the previous season. This increase is linked to strong utilisation in the Black Sea Region. Total trade is expected to drop by 17.4% year-on-year to 3.3 million tonnes, reflecting reduced shipments from Ukraine to the EU, which are pegged at 0.6 million tonnes.

Amid seasonal pressures in South America and a slowdown in global demand, soya bean quotations plunged by 34% from the previous year to USD 402 per tonne in Argentina. The US is now the most expensive origin at USD 446 per tonne due to strong demand from the biofuel market (however, this is a 24% decrease year-on-year). Brazil is the cheapest origin at USD 395 per tonne (28% below the same month previous year) due to ample stocks and low international demand.

Rapeseed prices lost ground given the ample supplies in key regions and declines in world vegetable oil markets. With a smaller year-on-year production, Canada stands as the most expensive origin at USD 470 per tonne, which is 28% lower than the previous year same period. Australia is at USD 469 per tonne, experiencing a 32% year-on-year drop despite projections of lower output. The EU prices decreased by 20% this year, to USD 448 per tonne, mainly due to losses in vegetable oil markets.

EU Bordeaux sunflower seed prices fell by 26% from the same month previous year to USD 442 per tonne, due to the weaker demand and ample domestic availabilities. Despite increases in the last months, Ukraine remains the cheapest origin at EUR 310 per tonne, with a drop of 24% year-on-year.

Total EU oilseed area for 2023/24, including linseed, remains near unchanged at 12 million hectares this month, which is 0.6% increase compared to the previous season. Marginal upward revisions of 5% year-on-year in the rapeseed on expanded areas in Romania, France, and Germany. Rapeseed area is expected at 6.2 million hectares, which is 0.3 million hectares higher compared to the previous season. While sunflower seed area is stable, soya bean experienced a drop of 9% year-on-year mainly due to revised areas in Italy, France and Croatia.

EU oilseed production is estimated at 33 million tonnes (+5% year-on-year). Slight increase in the rapeseed output due to expanded areas. Total rapeseed production now stands at 19.8 million tonnes. Despite the drop in area, soya bean production remains at 2.8 million tonnes, a 15% increase year-on-year due to higher yields (i.e. 2.84 tonnes per hectare). Finally, sunflower seed production is forecast to increase by nearly 10% year-on-year due to better yields in key Member States.

The EU protein crops area is pegged at 1.48 million hectares, reflecting area adjustments for broad beans and lupins.

EU production of protein crops is estimated to be 3.5 million tonnes (2.8% lower than the previous season). Field peas production is expected to reach 2 million tonnes, indicating a 4.8% increase year-on-year. On the other hand, broad beans experienced a 6.6% drop in production due to trimmed outturn in Denmark, Germany and Lithuania.

With regard to trade flows, the changes in oilseeds relate to lower rapeseed and sunflower seed imports compared to the exceptional marketing year 2022/23 when we had substantial imports from Ukraine. Total imports are now expected at 20 million tonnes, including 13.5 million tonnes of soya bean.

Total oilseed meal production is pegged at 29.8 million tonnes, including rapeseed meal at 13.6 million tonnes. Imports and exports of soya meal are expected to contract by 0.4 million tonnes and 0.15 million tonnes. Total oilseed meal imports are projected at 18.6 million tonnes, including soya bean meal at 15.2 million tonnes.

EU vegetable oil imports are anticipated at 6.5 million tonnes, including sunflower oil at 1.9 million tonnes.

Comments:

COPA highlighted that the decline in rapeseed cultivation, especially in Germany, is attributable to reduced prices rather than Ukrainian imports. The EU market relies on these imports. COPA expressed concern regarding the importation of organic oilseeds from China, emphasising the need for compliance with EU organic labelling standards. Additionally, COPA considers that the recently implemented GAEC derogations by the Commission will not positively affect protein crops in the absence of possibility to use plant protection products.

COCERAL voiced concern on the future prospects for soya bean and the implementation of the Regulation on Deforestation-free products (EUDR) scheduled for 2025. COCERAL underscored that the EUDR poses considerable uncertainty not only for EU importers but also for EU producers. We might face supply failures if this regulation is taken into account. It is a matter that should be carefully considered moving forward.

Ukrainian grains and oilseeds exports, logistics situation and production prospects

The Commission presented the latest update on the imports of cereals and oilseeds into the EU from Ukraine, in particular the situation in the five EU Member States neighbouring Ukraine.

The reopening of the Black Sea corridor eased the increase of shipments of feed wheat and maize to Spain where it has been needed following very disappointing crops two years in a row. As regards the imports of oilseeds and oilseed products, the EU is importing significant quantities of soya and soya meal from South America, the US and Ukraine.

Since the world started in May 2022 the initiative on the development of Solidarity Lanes, over 109 million tonnes of cereals and oilseeds have been exported from Ukraine by the end of January 2024. Solidarity Lanes represent two-thirds of the overall Ukrainian export of cereals and oilseeds but this share started to decline the last months because more grains go through the Black Sea corridor if there is security guaranteed for the vessels.

The Ukrainian production forecast is over 80 million tons of cereals and oilseeds of which they will be able to export about 59 million tons of cereals and oilseeds.

Comments:

COCEGA expressed their concerns as regards the low prices ex-farm in Ukraine as well as the Red Sea problems which are also bringing extra pressure on the EU markets, maize buyer mainly but also feed wheat in Asia switch to other origin because of the high freight prices due to the Red Sea tensions.

DG AGRI replied that our services are following very attentively what's going on in the Red Sea because there may be more severe implications for other agricultural products because container transport is even more affected by those disruptions than bulk product transport such as grains.

CELCAA expressed the need for more communication on the market situation. It is important to secure and facilitate the export of cereal grains from the Ukrainian market through for instance an efficient transit under the Baltic corridor. Transshipment and storage capacity in Polish ports should be increased and grain transport by rail from the Ukrainian market to the ports in Gdańsk/Gdynia, Szczecin/Świnoujście and Kołobrzeg should be improved.

CEPM and COPA emphasised the need to monitor the cereal price developments and resolve the Red Sea as well as the issues with the ATMs and COGEGA asked if the Commission could give an oversight on the significant sizes of imports coming illegally into Europe.

Information on the fertilisers market

The Commission presented the situation in the fertilizer sector. Market data on trade, average prices and production of fertilisers across the EU is now available on the Agri-Food data portal.

The drop in production in April was mainly due to increasing imports from cheaper source and dropping price. Imports declined compared to 2022 but are still very high. As regards the imports of urea, EU succeeded in diversifying the imports although Russia remains one of the main actors of the market. In 2023 we see an increase in the share of Russia but looking at the long term trend, the volumes imported from Russia are comparable with historical levels.

For phosphate, we consider two main inputs, phosphate rock and phosphoric acid. 70% of the imports concern phosphate rock. Potassium fertilizer imports decreased in the latest two years mainly due to a reduced demand by farmers and that price went up since 2021. For the market of phosphate and potassium, we are monitoring the situation of the tension in the Middle-East.

Nitrogen fertilizer exports is recovering but it is still below the five-year average. This is confirming a loss of competitiveness of the European-based industry. Exports are, on the contrary, high for potassium and phosphatic fertilizer. The prices for nitrogen-based fertilizer and the potassium are decreasing. The DAP (De-Ammonium Phosphate) price is increasing on the European and global markets mainly driven by increasing demand from third countries.

Comments:

COPA and Euroseeds raised concerns over the high fertilisers prices at the same time as cereal prices are going down.

Discussion on implementation of Good Agricultural and Environmental Conditions (GAEC) in the past two years

The Commission presented shortly some experiences with amendments to the CAP Strategic plans and went through some of the issues for farmers identified after the adoption of the CAP plans in certain situations to respect certain requirements. The partial derogation from GAEC 8 in 2024 was explained as well as the amendments to the Delegated Act in relation to GAEC 1.

Comments:

BeeLife asked why the nitrogen-fixing crops are considered not productive in the context of the partial derogation from GAEC 8. The Commission replied that nitrogen fixing crops are not non-productive but have environmental benefits. This is part of the partial derogation from GAEC 8. It was reminded that there is a ban on plant protection products on such areas under the partial derogation.

COCEGA explained the difficulties with the non-productive surfaces in certain years. The Commission needs to warn farmers early in the season to give the farmers sufficient time to plan and purchase seeds for example.

COPA added that the main problem is the one size fits all approach when we do have quite big differences in both climates, soils across the EU. It added that ruminants are important to keep the permanent grassland in good shape.

Any other business

BeeLife is proposing to work together with associations, for instance farmers or seed growers to create sectorial pollinator based management practices to identify the interactions of the sectors with the pollinators and then to generate best management practices that are touching the habitat and IPM. The webinar will be organised at the end of the process to promote work developed in collaboration with relevant stakeholders. It will permit sharing best practices. It will create a win-win situation. BeeLife invites all the sectorial associations to co-create these guides.

4. Next meeting

The next meeting is foreseen to take place on 18 September 2024.

CDG Seeds

1. Adoption of the agenda

The agenda was approved.

2. Nature of the meeting

The meeting was non-public.

3. List of points discussed

Overview of the seeds market situation

COPA-COGECA presented the seed production situation in the EU with the focus on the seed potato market. The total seed growing area in the EU in 2023 continued to decrease by almost 5% to 1.9 million hectares while the seed potato area decreased by 7.5% in the EU.

Several issues have been highlighted: poor quality due to high presence of viruses, lack of insecticides to control aphids in cropping season and wet weather conditions for harvest were raised. Difficult weather conditions resulted in lower yields and low germination rate. Flooded areas require reseeded this spring. Competition between ware and seed potatoes production is strong due to higher production costs for seed potatoes. Concerns about the trade in seed potatoes with the UK were raised where a new model is necessary to obtain a balanced two-way system.

Comments:

COPA-COGECA highlighted that there is a lack of potatoes for planting so the lower production will have an impact on export markets as the volumes available for export to third countries are limited and create imbalances across the chain.

EUROSEEDS agreed with the speaker and emphasised the need for the imports of seeds to comply with the EU legislation to ensure a good quality.

Market transparency – certified seeds notification set by Regulation (EU) 2022/791

The Commission informed about implementation progress of notifications for certified seed area, production and stocks, introduced by amending Regulation (EU) 2022/791. The same amendment also introduced requirements for notifications on stocks of cereals, oilseeds, and oilseed products, and comes after 2019 amendments introducing new price and quantity notifications for agricultural products, at agricultural production level as well as the supply chain (including processing and retailer buying prices). The Commission sought seed stakeholder feedback on certain limited amendments to the certified seed provisions, as well as on certain legal language issues around data collection.

Comments:

COPA and Euroseeds pointed out that information on seed stocks at both companies and at farmers' level can give an indication of what is available for sowing and guide operation decisions. The indication of the stock levels in both September and July is important. Member States should have data available for certified seed area sown and harvested, as these data are routinely collected already, and the lack of reporting after mid-2022 by a few Member States of these data may be due to coordination issues at national level (for example, the data may be held at in a Member State at a regional,

subnational level, and the national authorities have not yet managed to gather the data at national level).

Information on Member State prescription regarding appropriate cultivation conditions for varieties made herbicide-tolerant under Article 16(2) of Directive 2002/53 on the common catalogue of varieties of agricultural plant species

DG SANTE explained the Directive 2002-53 which is setting the rules for establishing a Common Catalogue of Varieties of agricultural plant species that can be marketed in the EU if they belong to varieties registered first at national level and then transferred to a Common Catalogue. According to paragraph 2 of Article 16, a member state can apply to be authorized to prohibit the use of a variety in all or in part of its territory or to lay down appropriate conditions for its cultivation for different conditions including if it is considered that the variety presents a risk for human health or the environment. under this specific provision of the Directive.

France introduced in February 2022 a request to be authorized to set such cultivation conditions for certain herbicide tolerant varieties of sunflower. The Directive requires that such authorization is given if in vitro and in vivo random mutagenesis are indeed subject to the GMO EU legislation, that in vitro and in vivo random mutagenesis are exempted from the application of the directive. According to the regulation the authorization has to be approved at the standing committee but the applicant has frozen the application.

DG SANTE clarified that the technical definition of an herbicide tolerant variety is where the natural resistance to an active substance is not there, but it has been somehow induced by breeding. Breeding could be by conventional breeding, crossing with a wild relative that has a resistance gene, in this case sunflower varieties that are bred to be resistant to a broadleaf weed killer so they are bred by in vivo mutagenesis to be tolerant to this kind of herbicides.

The socio-economic impacts of the legislative proposals on new genomic techniques and plant reproductive material on the EU seed market, on small and medium farms and on farmers' rights on seeds

Via Campensina (ECVC) presented the social and economic impacts of the legislative proposal on the new genomic techniques and plant reproductive material on the EU seeds market, impacts on the small and medium-sized farms, on farmers' rights on seeds and on the food sovereignty.

Temporary experiment (seed potato): state of play

DG SANTE explained the state of play of the temporary experiment regarding seed potatoes, marketing directive 2002-56 as regards the tubers in order to examine alternative conditions. The alternative condition that was asked to be examined with this temporary experiment took place from 2019 and expired last year in 2023. After the expiration of this experiment, the DUS (distinctness, uniformity, stability) protocol has been updated in order to take into account the specificities of potato varieties that are reproduced through the botanical seed, therefore the request for a new experiment and we are in the process of preparing a proposal as such experiment again has to be approved by the standing committee.

COPA and Euroseeds are in favour of a new experiment and asks if it would be interesting for other Member States than the Netherlands.

Plant Reproductive Material: state of play

DG SANTE presented the state of play as regards the legislation on plant and forest reproductive materials based on the seed marketing directives which cover seed and other propagating material, fruit plants, ornamentals as well as forest reproductive material.

Last year, the commission adopted proposals for two new regulations to replace these twelve directives. One regulation for the marketing of plant reproductive material, and one on the forest reproductive material. Since the adoption by the Commission, these two proposals are examined by the council and the European Parliament. This examination is ongoing. The two co-legislators have each of them to reach their own opinion, adopt their opinion, and then discuss between them to see what should be the final content of this new legislation.

Comments:

Copa and Euroseeds expressed concerns that some of the points for discussion would undermine the plant health legislation.

Information on Patent: state of play of the Commission study

The Commission has started the work on the assessment regarding the impact that the patenting of New Genomic Techniques (NGT) plants and related licensing and transparency practices may have on innovation in plant breeding, on breeders' access to genetic material and techniques and on availability of seeds to farmers as well as the overall competitiveness of the EU biotech industry.

In this regard, the Commission held a first exchange with the biotech patent experts from the Member States on the possible parameters of the assessment at the end of 2023, which confirmed the need for a careful and evidence-based approach.

As part of the assessment, the Commission intends to gather feedback on the relevant issues from the Member States and stakeholders. The exact format of this exercise is still to be determined and further information will be made available in due course.

The Commission intends to report on the results of the assessment and the possible follow-up measures, if any, within an appropriate timeline (at the latest by 2026), also taking due account of possible developments in the context of the legislative process on the NGTs initiative.

Any other business

BeeLife presented the same AOB point as under CDG Cereals, Oilseeds, Protein Crops.

No other point was raised.

4. Next meeting

Next meeting is foreseen to take place in March 2025.

5. List of participants

See the list of organisations present in the enclosed list.

List of participants– Minutes
*Meeting of the Civil Dialogue Group on Agricultural Markets – Cereals, Oilseeds,
Protein Crops & Seeds
5 March 2024*

ORGANISATIONS

BeeLife - Bee Life - European Beekeeping Organisation
CEJA - Conseil Européen des Jeunes Agriculteurs / European Council of Young Farmers
CELCAA - European Liaison Committee for the Agricultural and AGRI-Food Trade
CEPM - European Confederation of Maize Producers
COGECA - European agri-cooperatives / General Confederation of Agricultural Co-operatives of the European Union
COPA - "European farmers / Committee of Professional Agricultural Organisations of the European Union
ECVC - European Coordination Via Campesina
EEB - European Environmental Bureau
Euroseeds
FEDOLIVE - Federation de l'Industrie de l'Huile d'Olive de l'UE
FEFAC - European Feed Manufacturers Federation / Fédération européenne des fabricants d'aliments composés
FoodDrinkEurope
IFOAM - International Federation of Organic Agriculture Movements European Regional Group

Observer:

EUROPEAN ECONOMIC AND SOCIAL COMMITTEE
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