



Market Situation Seeds

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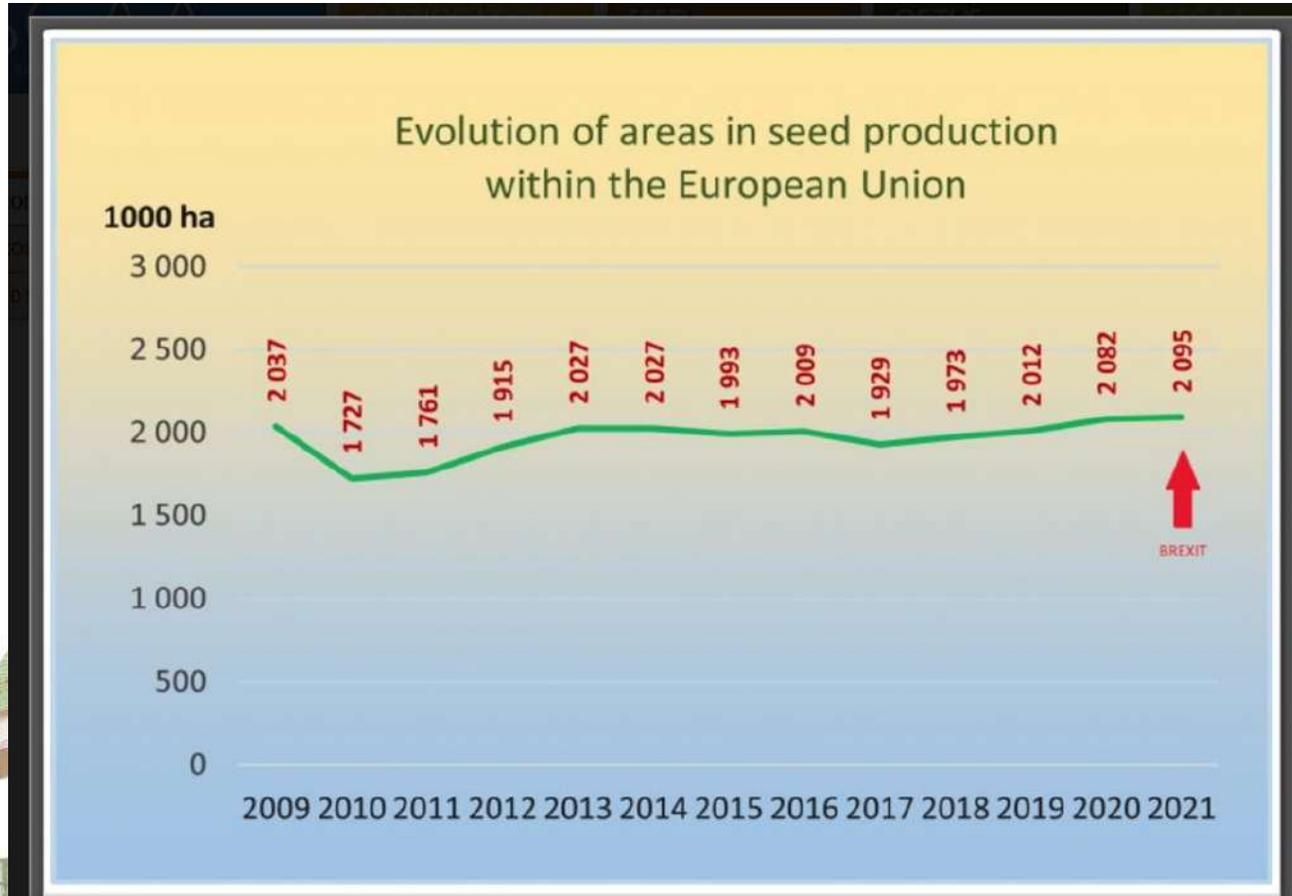
CDG COP +SEEDS

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EU seed production 2009-2021 (ha)

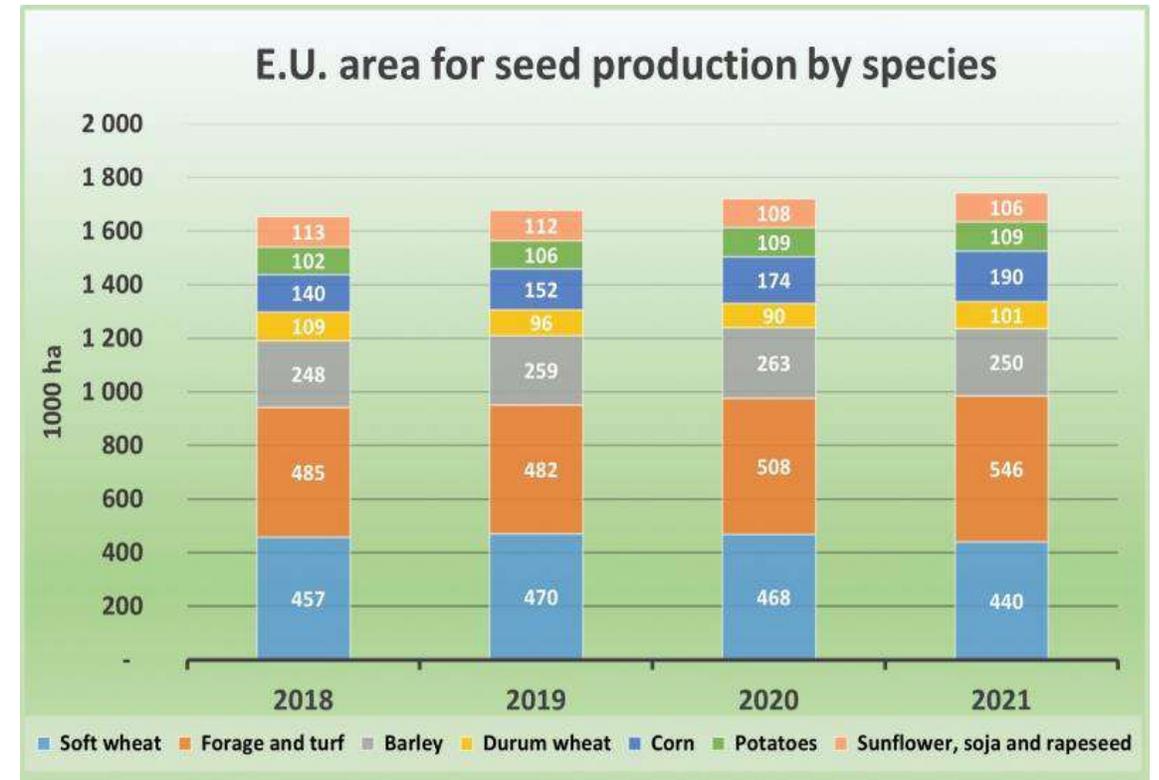
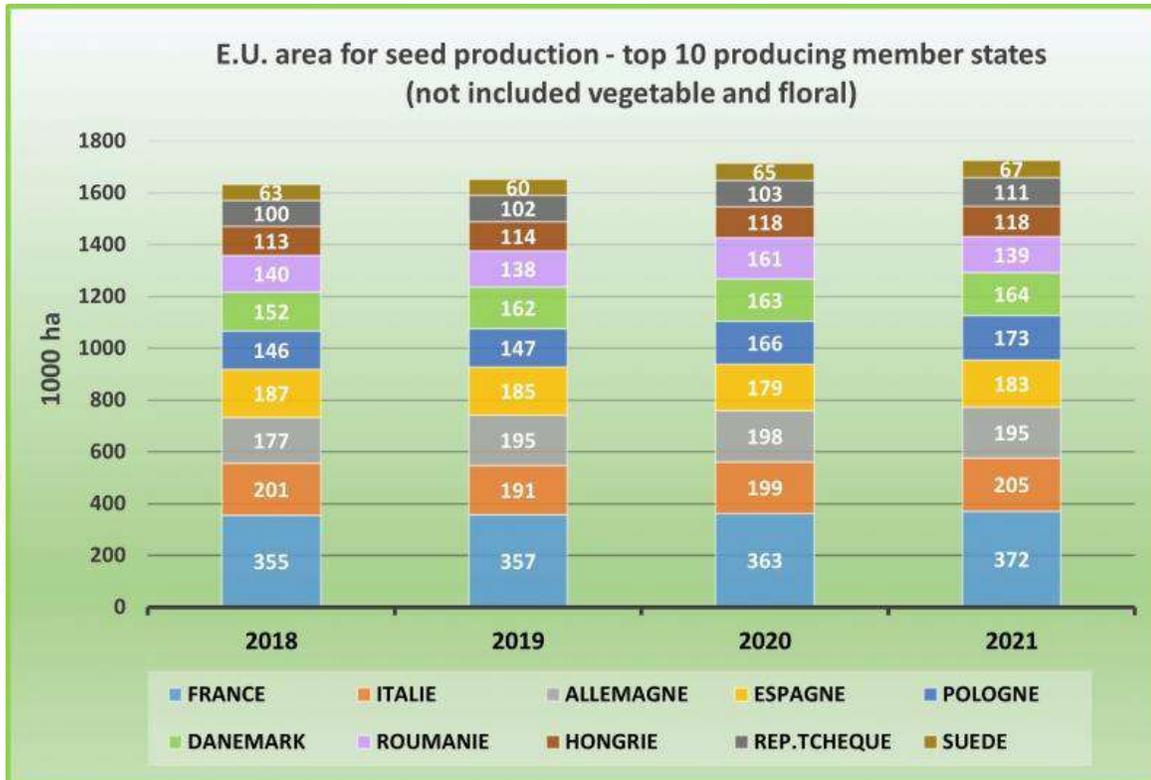
Source: ESCAA



- * In 2021, the areas to produce field seeds within the European Union remain stable (+0,6 %) to 2 095 420 ha (vegetable and floral seeds not included).
- * This total takes into account the exit of the United Kingdom from the European Union, whose areas increase significantly by 20% to 113 983 ha.

EU Area for seed production by species and Top 10 Member States

Source: (ESCAA)



France is a leader in seeds for cereals, corn, oilseeds, pulses, and fiber crops. Denmark dominates the forage grasses market, Italy that of small-seeded legumes and beets, the Netherlands that of seed potatoes.

France: evolution of the area for seeds in multiplication 2018-2022 (ha)

1-01 : Evolution des superficies de multiplication

Unités : hectare

	2018	2019	2020	2021	2022
Céréales à paille - protéagineux	144 490	139 614	134 606	140 841	133 985
Mais et sorgho	62 534	71 256	84 308	90 286	87 845
Fourragères	56 591	48 754	49 879	53 580	44 669
Betteraves	5 918	5 783	5 601	5 984	4 983
Pommes de terre	22 296	23 192	24 161	24 361	23 534
Lins et chanvre	24 878	26 882	31 852	24 945	33 920
Oléagineux	40 398	42 252	33 343	33 521	31 883
Potagères et florales	25 427	23 384	24 266	25 589	23 890
Ensemble	382 532	381 117	388 016	399 107	384 709

Source : SEMAE - SOC-FRANCE

2022/2021
-3.6%



Italy: field inspections of seed crops 2018-2022 (ha)

CROPS	2018	2019	2020	2021	2022
Grass & Vesce	28777,29	33143,22	30703,45	11201,04	26036,65
Cereals	84604,75	81635,72	83720,18	90474,21	93704
Maize	6380,22	6677,95	7870,99	8288,22	8742,72
Sugar beet	5416,16	5176,58	6218,15	6852,26	5596,84
Alfalfa	42781,66	31679,47	36228,42	38825,94	35933,03
Oilseeds	14370,46	13753,62	13754,71	13741,82	16363,36
Protein crops	5085,67	5536,85	6131,18	4931,78	4808,72
Chickpea	3060,43	1495,61	384,99	615,64	963,14
Others					
Total	210530,16	202250,36	208124,18	216306,28	215385,2

Sunflower +27%

2022/2021
-0.42 %

Source: Crea

Denmark: evolution of the area seeds for sowing 2018- 2022 (ha)

	2018	2019	2020	2021	2022
Seeds for sowing	102860	113341	106308	109817	123364
					2022/2021 +12.3 %



Source: Statistics Denmark



Germany: registered for field inspection by species 2018-2022 (ha)

Crops	2018	2019	2020	2021	2022
Cereals and maize	65222,84	70483,11	67636,36	65787,6	63728,89
of which maize	3738,75	4016,86	4116,63	3952,06	3942,55
Grass	7953,65	10012,97	11048,31	11252,99	9749,75
Leguminous	4988,53	6111,08	7448,84	6774,78	6993,86
Oilseeds	3946,32	4998,63	4761,6	5251,35	4788,74
Potatoes	11847,79	12731,83	13593,89	13421,9	13133,78
Other forage crops	12962,14	16292,21	18763,43	18267,17	16800,74
Total	106921,27	120629,83	123252,43	120755,79	115195,76



2022/2021
-4.6 %

Source: <https://www.bundessortenamt.de/bsa/en/seeds>

Hungary: evolution of the area for seeds in multiplication 2018-2022 (ha)

- * The 2022 corn cultivation and seed propagation were basically determined by the lack of rainfall and the heat. In some regions, after July 2021, there was no significant rainfall during the growing season of the corn plants. In 2022, the entire spring and summer were extremely dry, especially east of the Danube, and it was practically only due to the cooler April that the corn crops did not germinate and the corn crops were able to be somewhat fertile.
- * There may not be a serious shortage of rye seed in the fall of 2022, seed stocks of certain spring cereals varieties may run out prematurely.

Source:
Nebih

Species	2018	2019	2020	2021	2022
Total wheat	25062	26610	29577	27643	27859
Durum wheat	2046	1673	1567	1343	1642
Total barley	5217	6331	7265	8230	8798
Total rye	1583	2233	2610	2564	2046
Total autumn cereals	35495	38259	43578	40844	39050
Total spring cereals	4728	5178	5742	5554	3737



2022/2021
-32.7 %



Poland: area registered for field inspection 2018-2022 (ha)

	CROPS	2018	2019	2020	2021	2022
1.	CEREALS (with maize)	82167,1	79635,7	75562,4	72197,6	69365,1
2.	GRASSES	24840,1	29942,4	32135,8	33651	28718,8
3.	LEGUMINOUS	5863,47	9672,94	11877,1	12592,9	12133,2
5.	POTATOES	6112,78	6748,68	7497,39	6689,86	5839,48
6.	OILSEEDS	5722,89	976,84	10447,3	9690,31	8604,13
7.	SMALL-SEED LEGUMES	5863,47	4856,37	4627,87	4547,58	5425,76
8.	BEET	91,51	47,28	138,49	175,46	194
9.	FIBER PLANTS	447,4	448,08	695,66	580,64	202,38
4.	OTHER	8820,55	12441,1	22791,2	25315,8	16027,8
	TOTAL	139929	144769	165773	165441	146511

2022/2021
- 11,44%

Source: Polish Seed Trade Association

Romania: area for seed multiplication 2018-2022 (ha)

Crops	2018	2019	2020	2021	2022
Straw cereals	82531,5	80848,1	99295,5	76465,0	61244,4
Maize	23738,5	25712,8	31000,7	34763,6	31291,1
Soybean	5406,1	5965,2	5885,6	5193,4	7075,2
Sunflower	9455,2	6614,9	5454,7	5705,8	5025,1
Forage crops	16812,6	15342,0	12906,5	11012,6	9672,5
Potatoes	582,8	692,0	655,8	677,3	815,3
Total	138526,7	135175,0	155198,8	133817,7	115123,6

↓ 2022/2021
-13,9 %

Source: RO National Inspection for Seeds (INCS), Laboratory for Seed Quality (LCCSMS)

Views of Copa-Cogeca members of WP Seeds (February 2023)

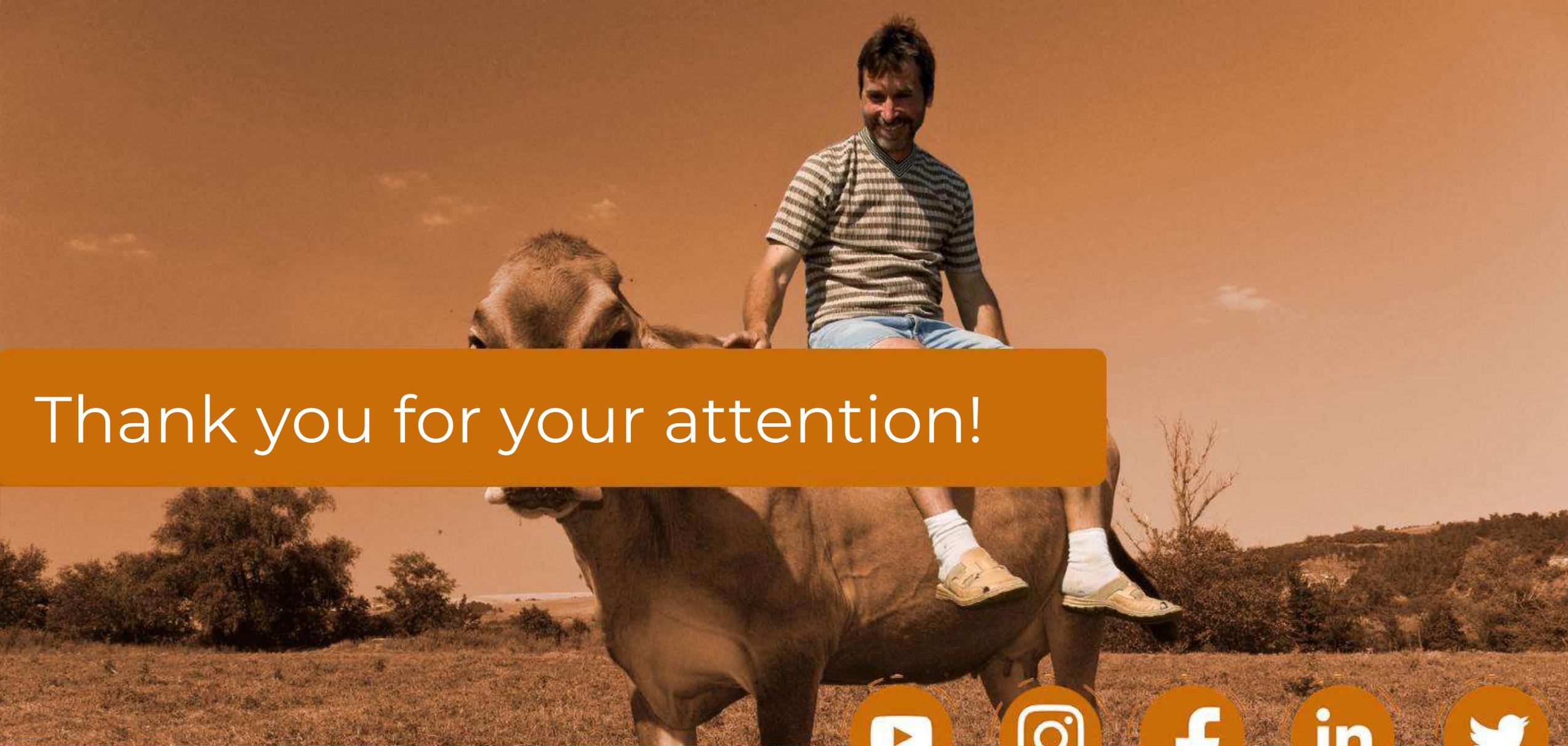
- *Cereals and Oilseeds: normal for autumn sowings in 2022.
- *Maize: seed production in 2022 reaches 70% of target, stock is down. In Hungary and Poland, maize seed exports to the east are affected by the war. Production sites are being closed in Russia. The sector is aiming for a (10-15% tbc) increase in seed maize acreage by 2023.
- *Sugar beet: area to decline in France and Italy.
- *Potatoes: market in balance.
- *Soybeans: not satisfactory in Austria. Need for derogation on seed treatment in Austria.



Views of Copa-Cogeca members of WP Seeds (February 2023)

- * Grass, clover and fodder species and ground soil covers: the 2022 harvest is very satisfactory in Denmark and Poland. Soil covers: the new CAP creates additional demand for soil cover varieties. Seeds of soil cover varieties are too expensive.
- * Competition between grain and seed production is strong. Input costs (energy, fertilisers, labour) and the lack of alternative solutions to banned PPPs handicap the competitiveness of the seed sector.
- * New CAP crop rotation rules: crop rotation is problematic when it comes to rotation with certain seed species.



A man with a beard, wearing a striped polo shirt and blue shorts, is smiling while riding a brown cow. The cow is standing in a field of dry grass under a clear, warm sky. The scene is captured in a warm, golden-hour light.

Thank you for your attention!



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