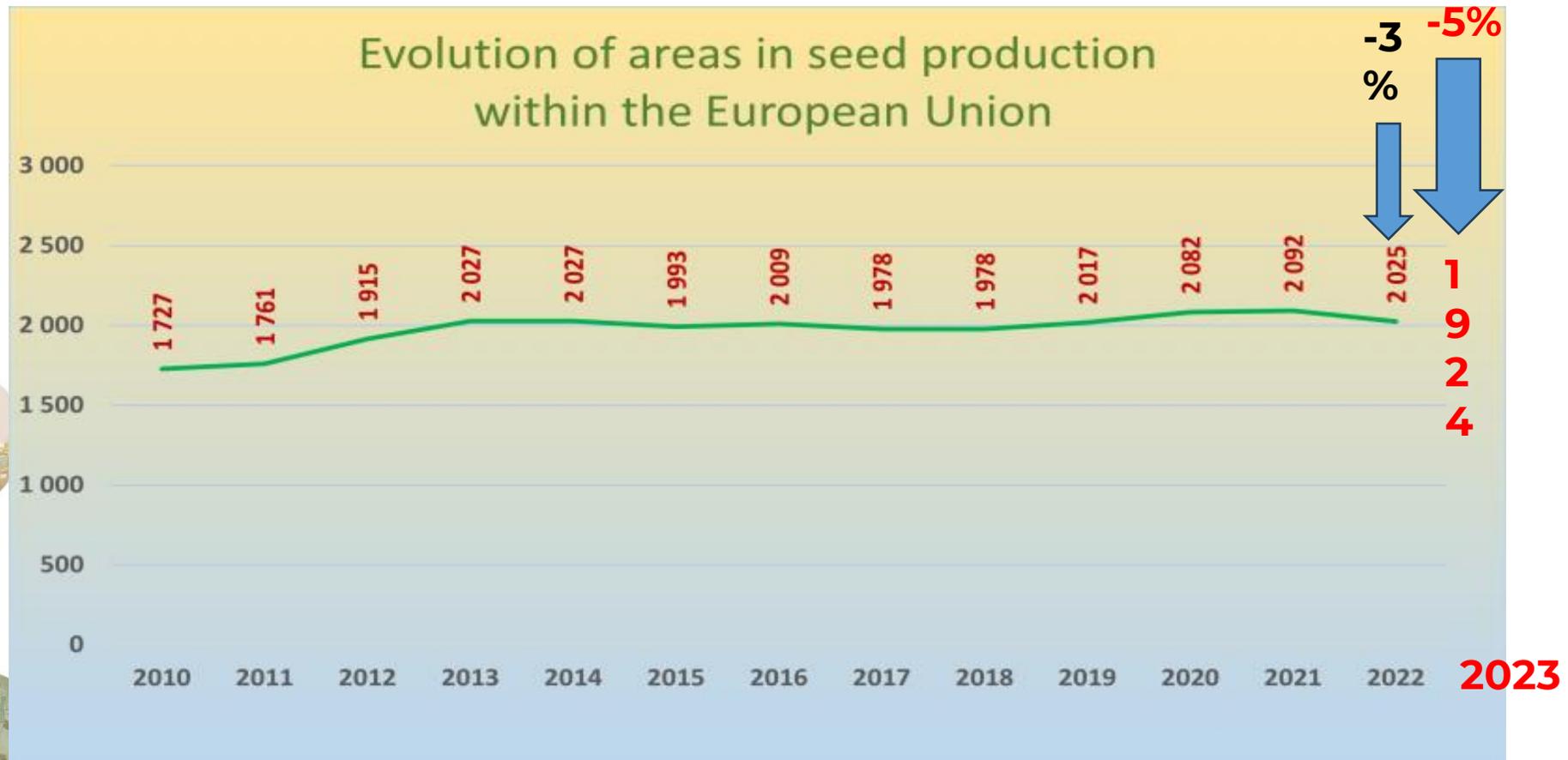




Market Situation Seeds

European Seed Certification Agencies Association (ESCAA) – seed areas 2010-2022 and forecast 2023 (1,000ha)



Surface (ha)	2022	2023	% 23-22/22
PAYS-BAS	41283	37785	-8,47%
FRANCE	22981	20292	-11,70%
ALLEMAGNE	17926	16565	-7,59%
POLOGNE	5925	5491	-7,32%
DANEMARK	4851	5011	3,30%
Total EU	104749	96863	-7,53%

Seed potato areas in the Member States in 2022 and 2023 (ha)

Source: ESCAA

Seed potatoes – insecticides issue

- * At EU level, less and less insecticides available against aphids
- * Flonicamid, problem of residues, only one application and before BBCH15 stage, Expiry of Approval : 30/11/2026
- * Spirotetramat, derogation on potato, expiry of Approval : 30/04/2024
- * Acetamiprid, NNI still authorized at EU level (forbidden in some MS)
- * Sulfoxaflor, NNI still authorized at EU level (forbidden in some MS), expiry of Approval : 18/08/2025
- * Pyrethroids less efficient and with aphids' resistance



Potato seeds – trends 2023

- * Competition between ware and seed potatoes production is strong due to higher production costs for seed potatoes.
- * Seed potato crops : overall poor quality due to high presence of viruses, lack of insecticides to control aphids in cropping season and wet weather conditions for harvest. High rejection rate (1/3 in some cases) significant shortage felt, certain varieties in particular cannot be supplied in 2023.
- * Market is adapting => certification of size > 45 mmm => technical problem for sowing with sowing machinery.
- * Increasing prices for seed potatoes due to unbalanced market.
- * Increasing use of farm saved seeds.
- * Quality standards risks not be met.
- * Knock-on effects on contract negotiations.
- * Trade between GB and EU
 - * Approximately 30,000 tonnes of seed potatoes were exported from Scotland and Northern England to the EU for multiplication and production of ware potatoes, with a similar quantity of seed potatoes exported from the EU to the UK.
 - * We ask for a legal interpretation of Article 42.4 of the EU Plant Health Regulation 2016 No. 2031.
 - * The Commission and the UK government must agree on a new model for two-way trade in seed potatoes between GB and the EU.



Views of Copa-Cogeca

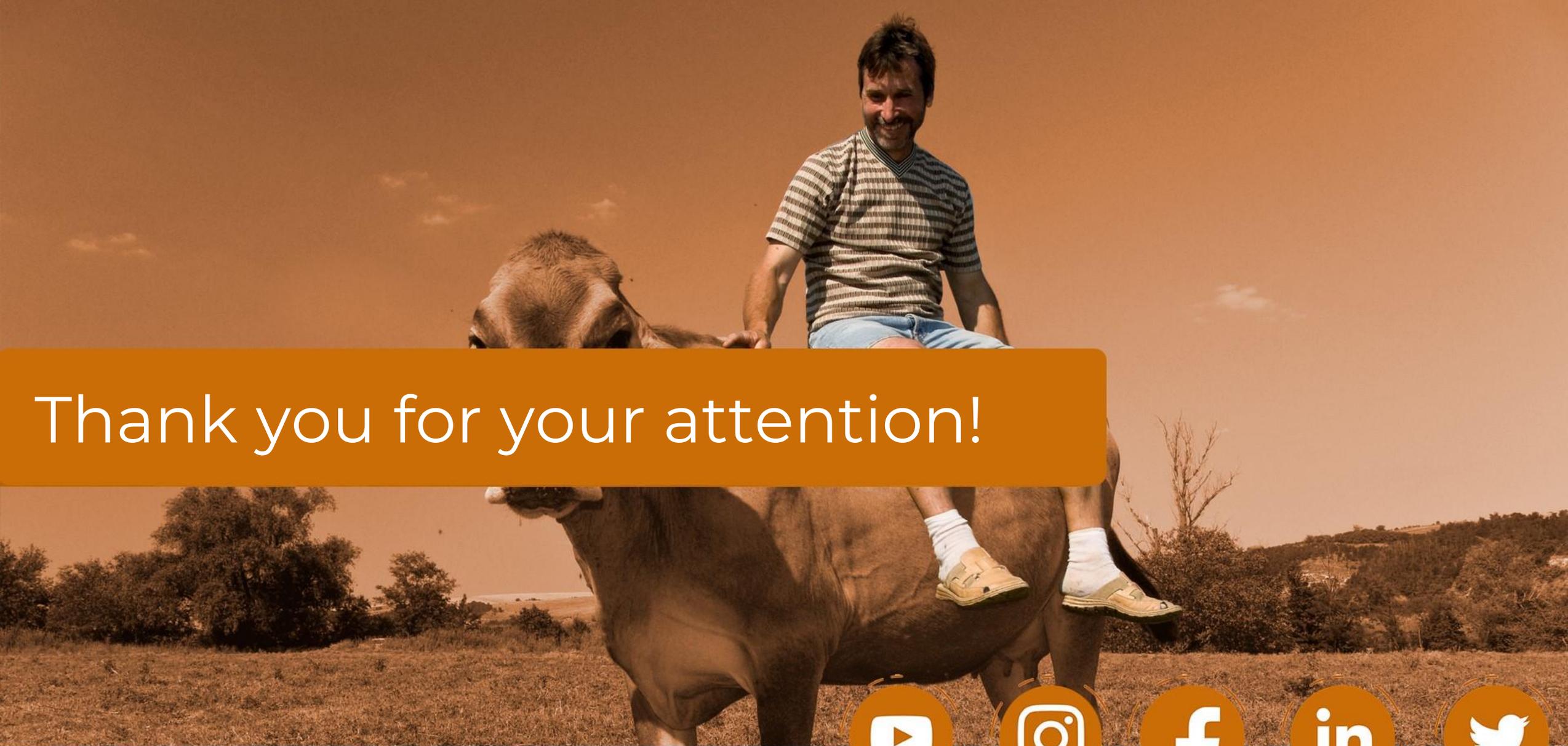
- * Less sowing for winter cereals and OSR: abnormal conditions for autumn sowings in 2023, flooded areas are damaged and require reseeding, significantly poorer germination capacity
- * Increasing area of spring crops
 - * higher demand for certified seed for spring-sown cereals
 - * Corn area expected to increase – corn seed market supply is not a problem but Polish seed growers suffer of competition from UA.
 - * GAEC 7 derogation needed, we want to avoid penalties.
- * GAEC 7: crop rotation is problematic when it comes to rotation with certain seed species (bis-annual crops).



Spring sowings 2024

- * Cereal seed production in many areas (particularly in the North) was poor in 2023.
 - * This fact combined with less winter-sowing in the autumn 2023 due to wet conditions, will increase pressure on spring-types. Some areas will lack certified cereal seed for the 2024 spring sowing.
- * Hence farmers may need to use Farm Saved Seed to a higher degree resulting in less certainty for 2024 production.
- * Spring sowing of grasses for 2025 harvest looks to be quite low due to high stocks.



A man with a beard, wearing a striped polo shirt and blue shorts, is smiling and riding a brown cow. The cow is standing in a field of dry grass under a clear, bright sky. The background shows some trees and a distant horizon.

Thank you for your attention!



www.copa-cogeca.eu