



#GrowingTheFuture

# Market Observatory Meeting on Tomatoes

26.10.2023

# Content

- Introduction to Euroseeds
  - Main role, who are we...
- Seed value chain
- Complexity of vegetable seed business
- Statistics –EU seed sector





# About Euroseeds

- SINGLE voice of the **European seed sector**
- Represents the European seed industry via the **European institutions** and their representatives:
  - European Commission;
  - European Parliament;
  - Council of Ministers;
  - Community Plant Variety Office;
  - European and Mediterranean Plant Protection Organization...



## Euroseeds' main role

- **Inform - Represent - Advocate**

On **all seed related issues**:

- seed marketing, incl. GM and organic seed
  - Intellectual Property Rights; biodiversity; access; research
  - plant/seed health; seed treatment; environment;
  - land use and food production...
- **Help resolving members' concerns related to different crops**



## Who we are?

**34**

**National member associations** from EU Members States and beyond, which in turn represent many thousand seed businesses across Europe.

**67**

**Direct company members** from family businesses to multi-nationals, including seed related industries.

Euroseeds has members also in other parts of the world: e.g. in the USA, Canada etc.

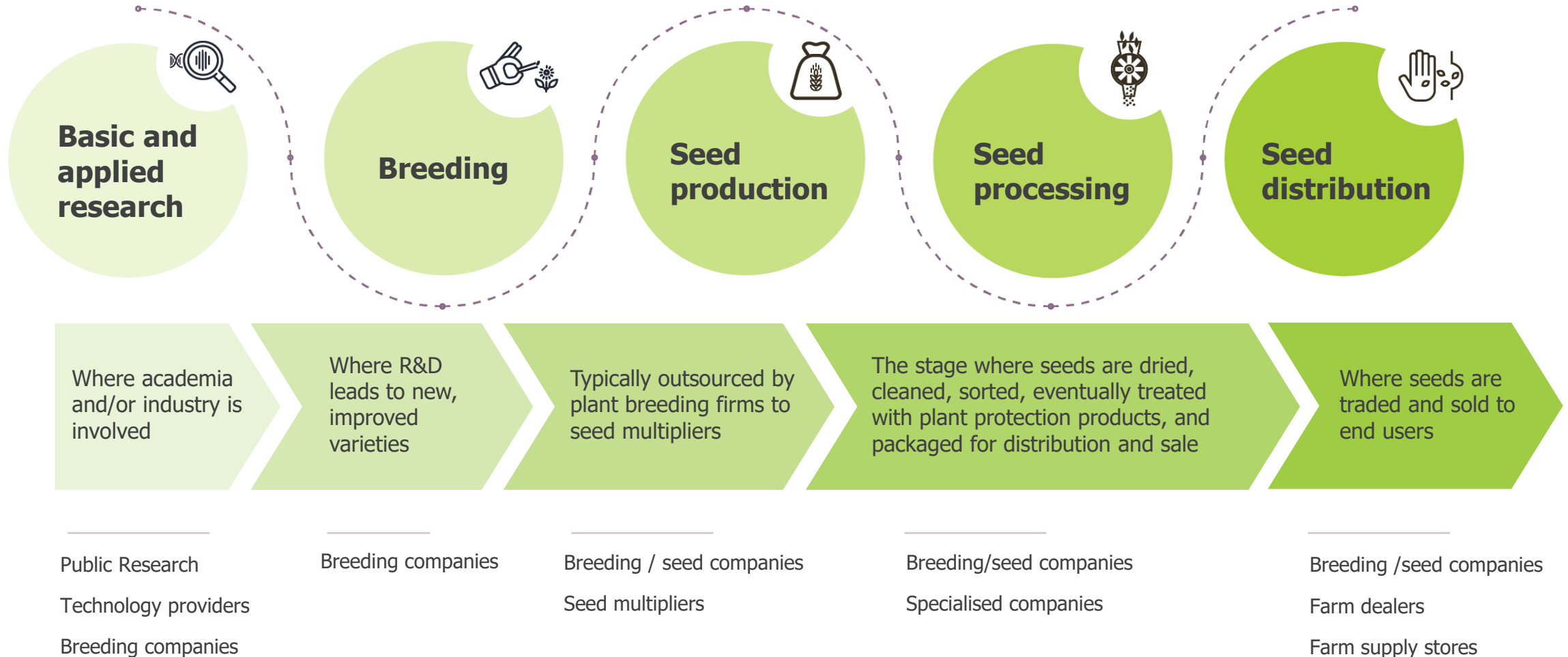


### Mission:

Euroseeds' mission is to engage, on behalf of its members, with all relevant European decision makers in order to represent their interests and to contribute to a:

- **fair and proportionate regulation** of the European seed sector;
- **freedom of choice for customers (farmers, growers, industry, consumers)** in supplying seeds as a result of innovative, diverse technologies and production methods;
- **effective protection of intellectual property rights** relating to plants and seeds.

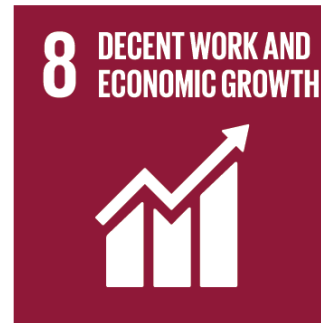
# Understanding The Seed Value Chain



# OUR ASPIRATIONS FOR THE EUROPEAN SEED SECTOR



**IMPROVING**  
the sustainability of food  
production, contributing  
to the new EU Farm to  
Fork strategy;



**ENSURING**  
that the European  
agri-food sector can  
remain fair and  
competitive;



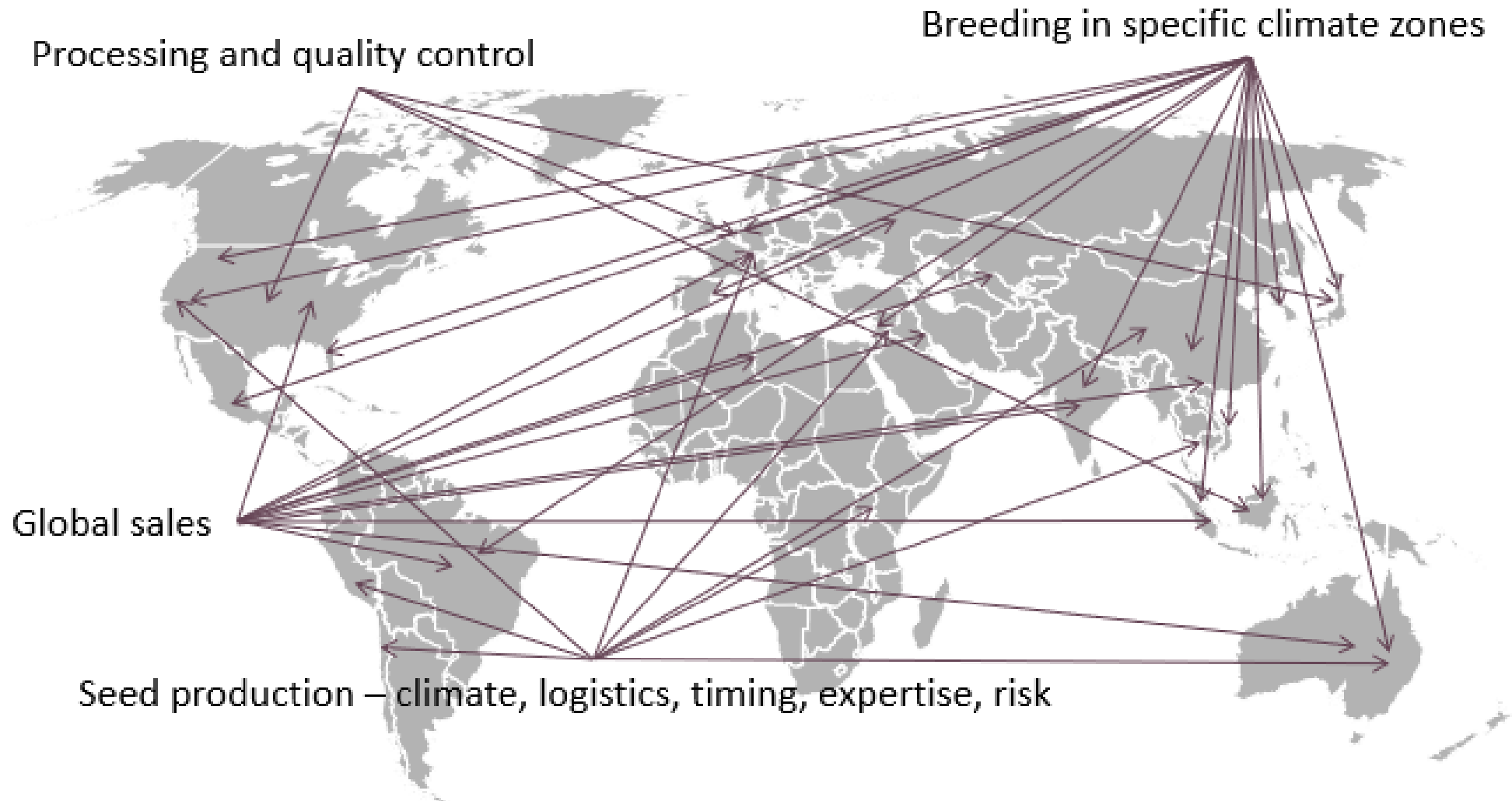
**MAINTAINING**  
and promoting Europe's  
high food quality and  
standards;



**CONTRIBUTING**  
to Europe's climate,  
environmental and  
biodiversity goals.



## Vegetable seed business is global - import & export are essential





# The EU seed sector: facts & figures

**EMPLOYMENT:**  
approx.

**52.000**

**ANNUAL R&D  
SPENDING:**

up to: **20%**

(of the companies'  
turnover)

**R&D  
STATIONS:**

**750**

## SEED MARKET IN THE EU:

**COMMERCIAL  
SEED MARKET**  
value: **€ 10 bn\***

**FARM  
GATE** value  
of agricultural  
products:  
**> € 100 bn**

**PROCESSED  
AGRICULTURAL  
PRODUCTS**  
value:  
**> € 1.000 bn**

*\*Source: OECD (2018), Concentration in Seed Markets: Potential Effects and Policy Responses, OECD Publishing, Paris.*

# Guardians and Creators of Biodiversity

**4.000** NEW  
VARIETIES

of agricultural and vegetable  
species come to the  
EU market **EVERY YEAR\***.

**51.000** DIFFERENT  
VARIETIES

of agricultural and vegetable  
species are available to EU  
farmers **TODAY\***.

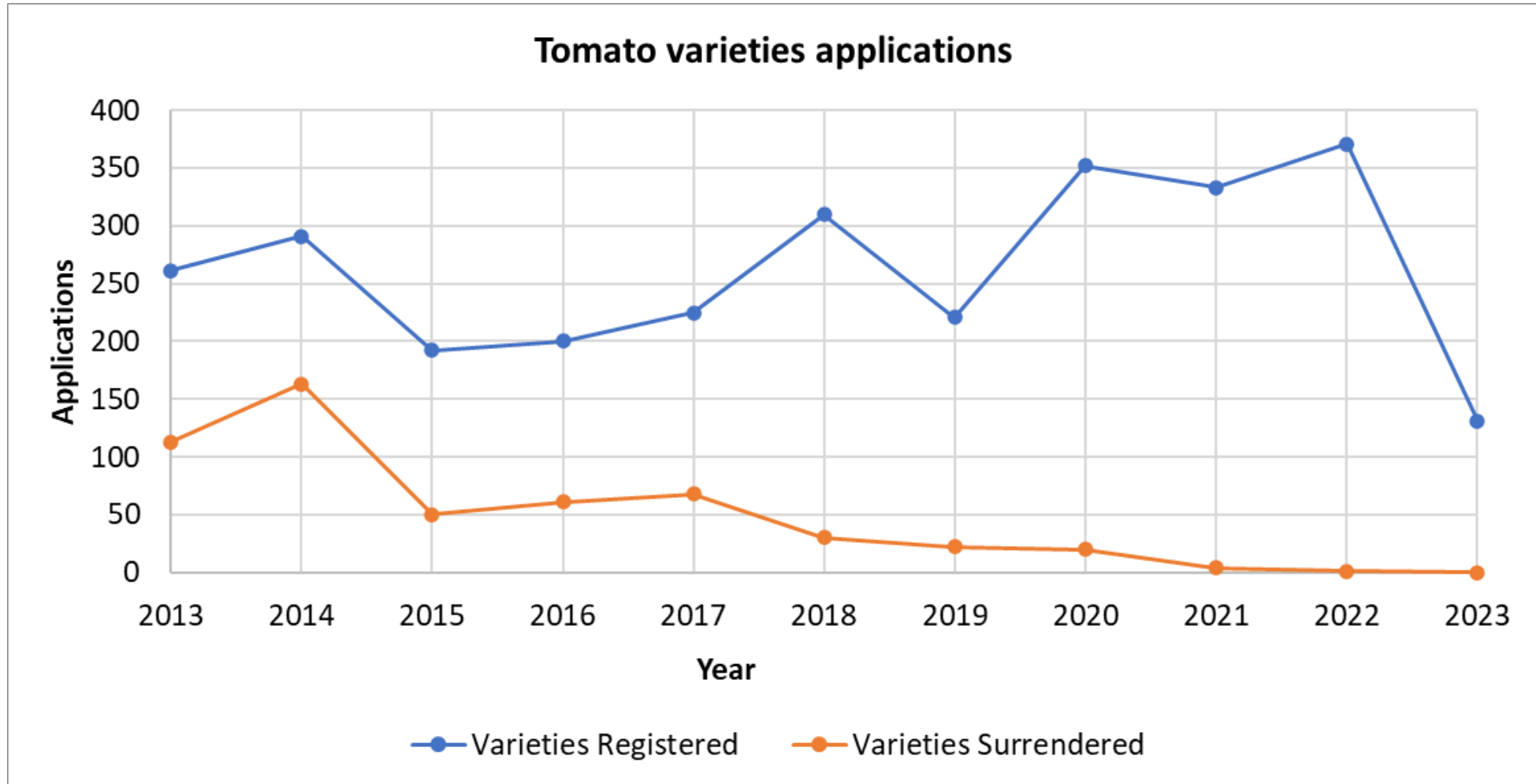
Source: *\*Source: EU common catalogues of varieties of agricultural plant and vegetable species (2023)*

# Tomato varieties on the EU Common Catalogue



Source: \*Source: EU common catalogues of varieties of agricultural plant and vegetable species (10.2023)

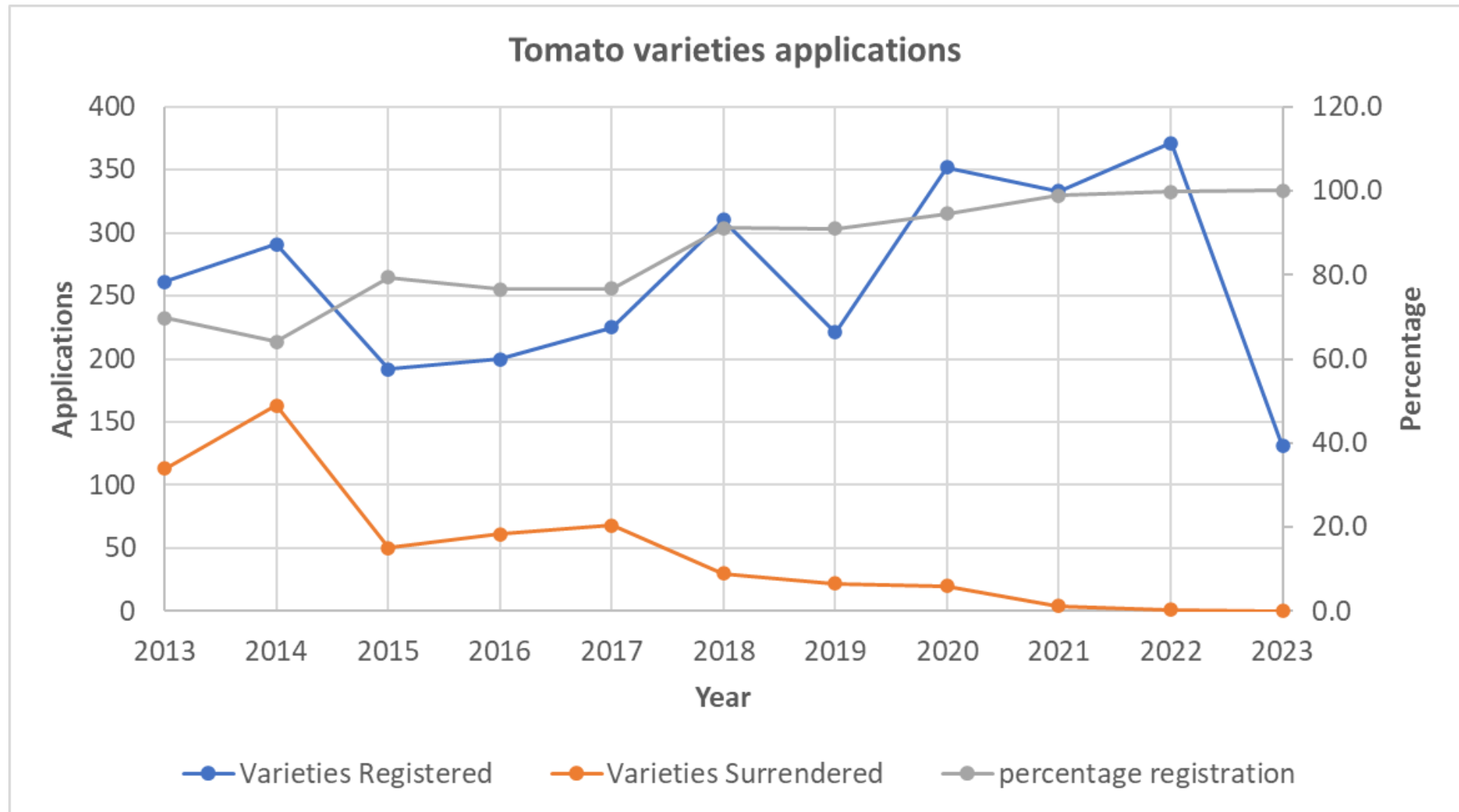
# Tomato varieties over the last 10 years



Source: \*Source: EU common catalogues of varieties of agricultural plant and vegetable species (10.2023)



# Tomato varieties over the last 10 years



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## Import and export of seeds for sowing (ISF 2020)

	Quantity (metric tonnes)				
Seed for sowing	Vegetable crops	% of total	Field crops	Total	
<b>Global import</b>	158.095	2	5.869.880	7.502.058	
<b>Global export</b>	145.312	2	5.410.337	7.264.795	
	Value (mio Euro)				
Seed for sowing	Vegetable crops	% of total	Field crops	Total	
<b>Global import</b>	4.025	31	8.014	13.094	
<b>Global export</b>	4.136	30	8.556	13.904	

# Tomato Seed Production and Sales in EU

- At least 80% of the tomato seeds is imported is imported into the EU
- About 10% of seeds for EU sales are produced in the EU
- In general, seed produced in the EU is not sufficient for the EU demand on tomato





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