ESA

European Seed Association

the seed industry in the region

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CPVO Enforcement Seminar – Hamburg – 25.05.11

CPVO Enforcement seminar – Hamburg

1. European Seed Association
2. Key facts and Figures
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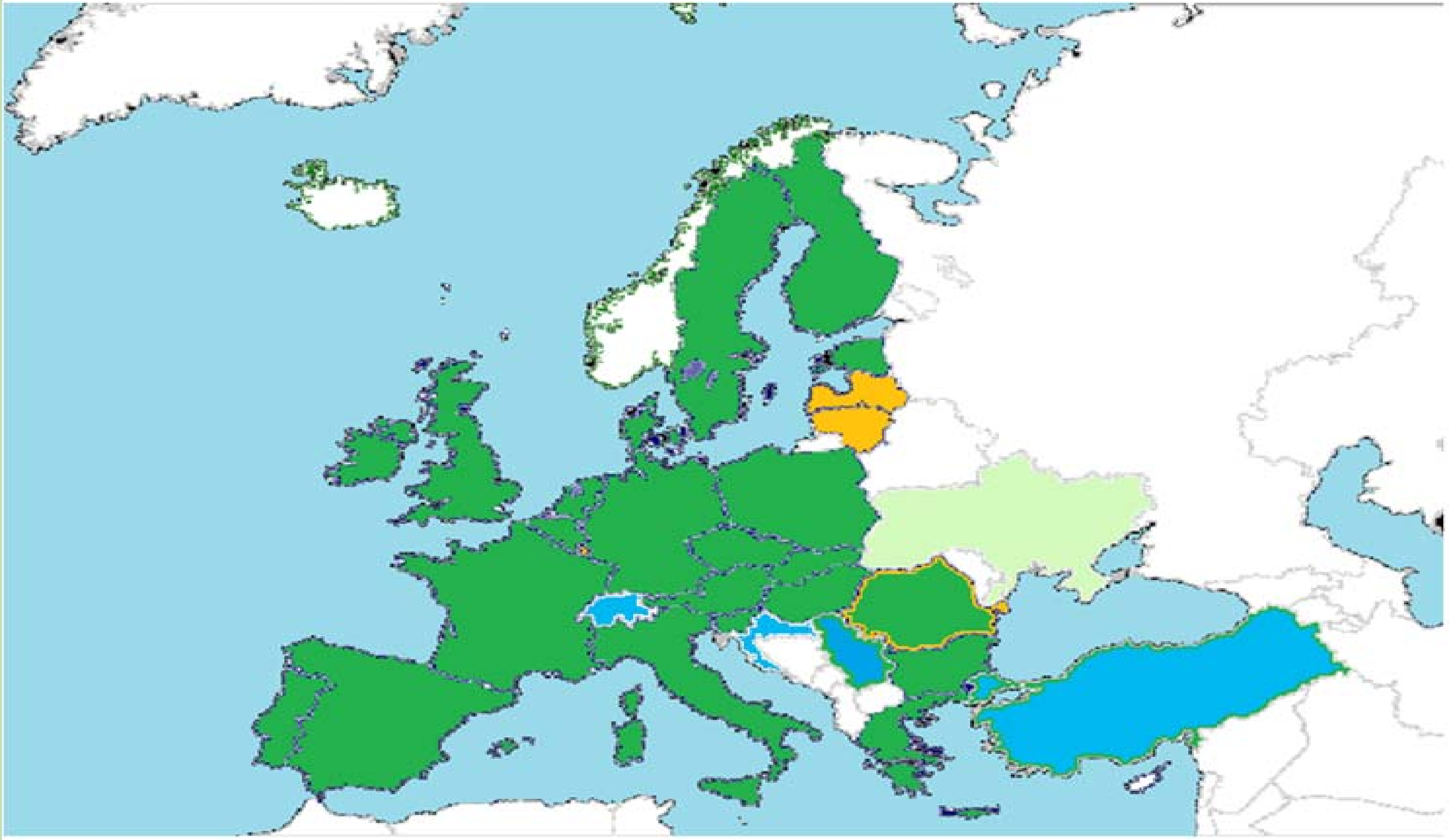
4. Summary

1. European Seed Association

ESA Membership today

- 35 national seed associations
  (ESA Association Members)
- 43 direct company members
  (ESA Individual Members)
- 18 associate company members
  (ESA Associate Members)

1. ESA Association Members



1. Individual Members

ESA
EUROPEAN SEED ASSOCIATION

1. ESA Associate Members

aib
Anti Infringement Bureau

ALTIUS

BREEDERS TRUST

BASF
The Chemical Company

BAYER
Bayer CropScience

KINCANNON & REED
International Executive Search Since 1981

Nufarm

SUET
SUET Saat- und Erntetechnik GmbH

DRUMMONDS
Limited

Agri Information Partners

INCOTEC

KeyGene

vondst
advocaten

syngenta

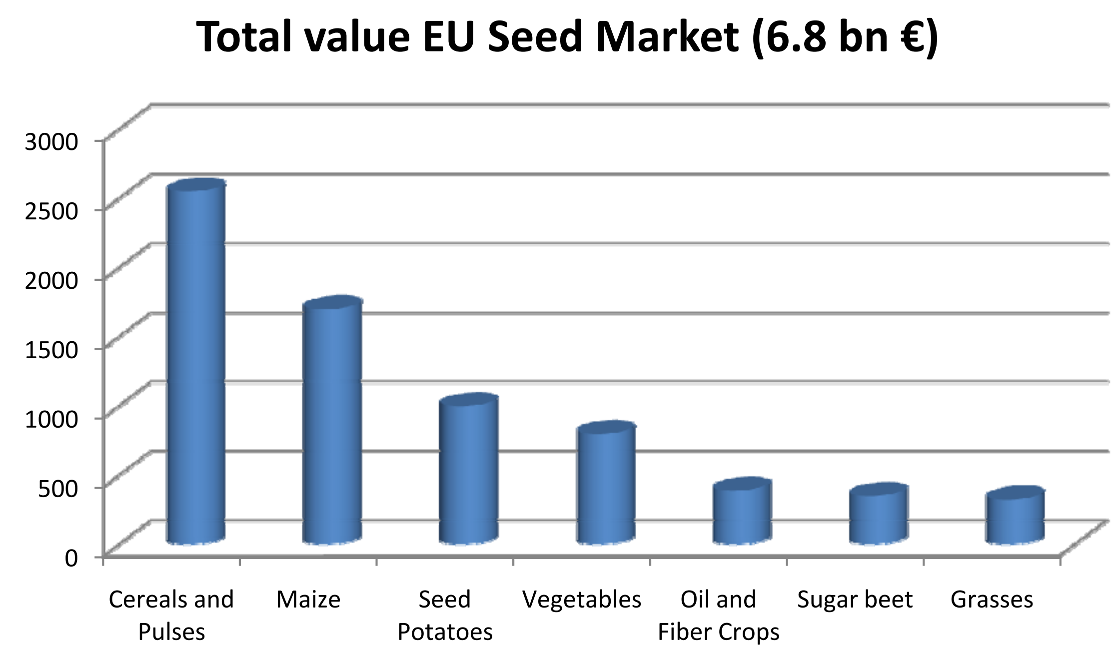
Chemtura

GTG
Germains Technology Group

Plant Breeding Academy[SM]
UCDAVIS

SeedQuest

2. EU seed market – key facts and figures



2. EU seed industry – key facts and figures

Value EU seed market	€ 6.8 bn
Number of seed companies	7.200
Employment	ca 52.000
Annual R&D Spending	4% – 20% (of turnover)
R&D Stations	750
R&D Employees	ca 12.500

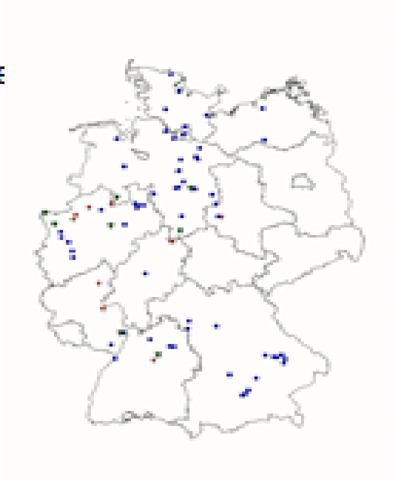
2. EU Seed industry - Innovation and impact

Annual R&D spending of seed industry EU	ca. 15% = € 1 bn
Value seed market EU	€ 6.8 bn
Farm gate value agric. products EU	> € 70 bn
Value processed agric. products EU	> € 700 bn

3. Seed industry in the region

German Plant Breeding Industry - Key Figures

- **130** plant breeding and seed trading companies
  60 breeding companies with own breeding programme
- seed market volume **EUR 1.5 billion,**
  EUR 650 m (43.7 %) abroad
- **12,000** workforce (breeding and seed production)
- **16.1 %** R&D to turnover-ratio
- **4,400** ha breeding nurseries
- **130,000 m²** greenhouse area



Agricultural crops
Vegetables
Ornamental plants

3. Seed industry in the region (continued)

	Country	Arable crops (1)	Wheat (2)	Barley (2)	Oilseed rape (2)
		(x 1000 ha)	(x 1000 ha)	(x 1000 ha)	(x 1000 ha)
	Germany	16.926	3.270	1.593	1.410
Scandinavia					
	Denmark	2.695	735	490	148
	Sweden	3.076	403	351	94
	Finland	2.296	242	490	135
Baltics					
	Estonia	802	122	141	90
	Latvia	1.825	300	138	105
	Lithuania	2.672	535	260	290
	Poland	15.608	2.360	1.080	800

(1): DG AGRI
(2): Coceral

3. Seed industry in the region (continued)

	Country	Value (in million €)	Companies	Employ-ment	R&D Stations	Personnel in R&D
	Germany	1.500	130	12.000	120	2.300
Scandinavia						
	Denmark	200-250	9	735	5	50
	Sweden	250-300	55	720	15	205
	Finland	100-150	22	300	12	80
Baltics						
	Estonia	<50	17	600	4	200
	Latvia	50-100	10	250	4	25
	Lithuania	50-100	10	250	4	25
	Poland	150-200	2.000	5.500	25	625

3. Seed industry in the region (continued)

	Country	Arable crops (x 1000 ha)	Value (in million €)	FSS (%)	Companies	Independent private breeding companies
	Germany	16.926	1.500	50	130	50+
Scandinavia						
	Denmark	2.695	200-250	15	10	<10
	Sweden	3.076	250-300	25	55	<10
	Finland	2.296	100-150	70	22	<10
Baltics						
	Estonia	802	<50	75	17	<5
	Latvia	1.825	50-100	75	10	<5
	Lithuania	2.672	50-100	75	10	<5
	Poland	15.608	150-200	90	2.000	<10

4. Summary

Breeding industry in the region:

Important

- Value
- Employement

Number independent private breeding companies

- Variable depending of the country
- Depending of % use of FSS

Return on investment needed

- Increased investments in R&D
- Maintaining local breeding programs
- develop improved and adapted varieties

Thank you for your attention

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