



Report on cross-country exchange meeting of central and northern EU-countries to improve supply of organic seed

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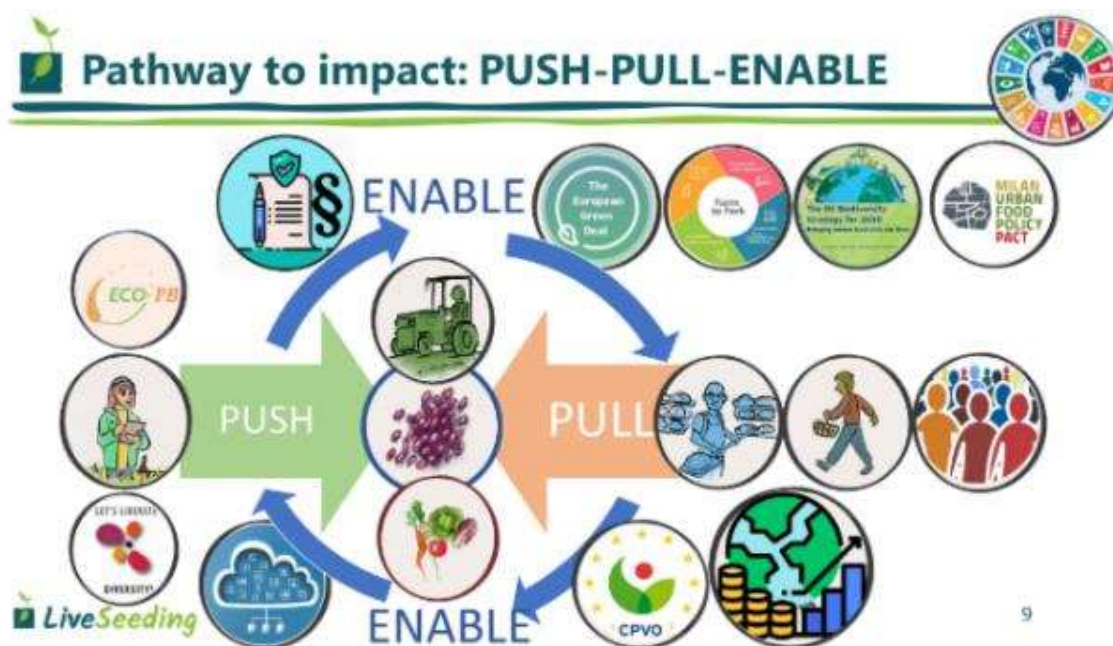


UK Research
and Innovation

LiveSeeding - Organic seed and plant breeding to accelerate sustainable and diverse food systems in Europe is a 4-year Innovation Action funded by the European Union, the Swiss State Secretariat for Education, Research and Innovation (SERI) and UK Research and Innovation (UKRI). The project started in October 2022 and brings together 37 organisations operating in 16 European countries. LiveSeeding provides science-based evidence and best practice solutions to help achieve 100 % organic seed.

LiveSeeding contributes to the transition towards environmentally-friendly, climate-neutral, healthy and fair food systems through a **PUSH-PULL-ENABLE** strategy to

- enhance the availability and adequacy of organic seeds of cultivars appropriate to organic farming (PUSH),
- increase and stabilise the market demand for organic seeds of cultivars appropriate to organic farming (PULL),
- foster an enabling policy and regulatory environment where both demand and supply can harmoniously and productively negotiate without irrelevant constraints due to legal restrictions and/or regulatory fragmentation (ENABLE).



LiveSeeding addresses the topics in a **holistic multi-actor, multi-stakeholder, participatory approach** involving stakeholders along the value chain in 17 local **Living Labs** (LLs) and 3 established networks of organic breeders (**ECO-PB**), seed savers (**ECLLD**) and Milan Urban Food Policy Pact (**MUFPP**). 15 European countries cover the different pedoclimatic zones and socio-economic contexts, including countries with a low level of development in organic seed and breeding in East and South Europe.

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Summary

This report summarizes the LiveSeeding stakeholder event that was held online on 23 May 2024. The aim of the meeting was to foster cross-country exchange of central/northern EU-countries on improving supply of organic seed. Following countries were invited: Austria, Belgium, Denmark, France, Germany, Ireland, Luxembourg, Sweden, Switzerland, the Netherlands, United Kingdom. Representatives of competent authorities, agricultural ministries, control bodies, seed authorities, seed database manager, breeder and multiplier of organic plant reproductive material (PRM), and organic farming associations participated. After a short welcome the objectives of the meeting were presented. Followed by a short introduction round where all participants could introduce themselves. Kaja Gutzen (FiBL Germany e.V.) gave a short presentation on the current categorisation of crops and planned data collection within the LiveSeeding project. Tove Mariegaard Pedersen (ICOEL Denmark) presented the current state of play in Denmark with a focus on seed expert groups and the concept of equivalent varieties. Freya Schäfer (FiBL Germany e.V.) presented a national project that is funded by the German ministry to increase supply and use of organic seed. Matthias Klaiss (FiBL Switzerland) gave an impression on the current revision of the organic regulation and the supply of organic seed in Switzerland. At the end of the 2,5 hour session, a voting on six relevant questions was conducted via Mentimeter. Participants could give feedback on the event, whether there is a need to foster further exchange and to collect potential topics for a next meeting. The meeting was moderated by Freya Schäfer, FiBL Germany e.V.

Agenda:

Time	Presentation	Speaker
10:00	Welcome & Objective of the meeting	Freya Schäfer, FiBL DE Tove Mariegaard Pedersen, ICOEL DK
10:15	<i>Short introduction round</i>	<i>all participants</i>
10:30	Update: Analysis of cat-1-crops in central/northern EU-countries & data collection in LiveSeeding	Kaja Gutzen, FiBL DE
10:40	<i>Discussion</i>	<i>all participants</i>
10:50	Input from DK – Expert groups and equivalent variety lists to support organic seed use	Tove Mariegaard Pedersen, ICOEL DK
11:00	<i>Discussion</i>	<i>all participants</i>
11:15	Input from DE – Roadmaps in Germany - a national project to support supply of organic seed	Freya Schäfer, FiBL DE
11:25	<i>Discussion</i>	<i>all participants</i>
11:40	Input from CH – Status-quo on organic seed supply and revision of organic regulation	Matthias Klaiss, FiBL CH
11:50	<i>Discussion</i>	<i>all participants</i>
12:05	<i>Open discussion & questions via Mentimeter</i>	<i>all participants</i>
12:30	Wrap-up and end of meeting	Freya Schäfer, FiBL DE

1. Welcome & Objective of the meeting

Presentation given by Tove Mariegaard Pedersen, ICOEL DK

Motivation: The Innovation Centre for Organic Farming in Denmark is a research and development centre, supporting the development of sustainable organic farming in Denmark including organic seed issues. In a national project called "future-proof organic vegetable seeds", issues of supply and demand of organic vegetable seed have been in focus. There is a limited supply of organic vegetable seed and supply does not equal demand of organic vegetable growers. It is a highly specialized production, and thus growers have a high demand for quality of seed and varieties. The wholesale market is estimated to around 90% of market share and it is a strongly competitive market with special requirements for uniformity in vegetables. It is difficult for growers to obtain organic seed of the requested varieties.

Even if there is a large organic market share and large share of organic growing area, Denmark – as many other countries – is still a relatively small market for seed, that is not large enough to invest in for larger seed companies. Vegetable breeding is centered in a few companies/countries. Therefore, we see a need for boosting supply and demand of organic seed in cooperation with other countries.

On one side, the demand for organic seed is restricted by the farmers' demand for specific varieties, that may not be available in organic quality, and there is limited knowledge about available varieties, and then derogations are used to get access to demanded varieties. The derogation practice is different from country to country which may also affect demand. On the other side, supply is restricted by difficulties in seed production with e.g. pests and diseases especially in perennial species. The yields are lower and larger seed production areas and skilled seed producers are needed, and costs and seed prices increase, which makes it more difficult to sell the seed at a fair price for growers. Also, breeding techniques that are not accepted in organic farming can restrict the supply of organic seed, as some companies will only use the same technique for organic as for conventional production.

Dialogue and cooperation between stakeholders on both national level and international level is needed to overcome some of these obstacles.

In a European network, we can stimulate communication between seed companies, farmers/growers and authorities across borders in countries facing similar obstacles. Together, countries with relatively small organic vegetable production area, breeding and seed production stand stronger, and can provide important data on market

potential to increase overall demand and thereby stimulate organic seed production. A network can also support use, distribution, and production of organic seed by improved communication and common seed requests. Different derogation practices in neighbouring countries incl. category 1 crops affect the supply of organic seeds differently among countries and increased communication among countries can create a more level playing field for farmers and companies – as a starting point specific crops can be in focus. In a network, it is possible to give inspiration and exchange knowledge with other countries in the same situation regarding expert groups, national action plans, obstacles in seed production and organic field trials in comparable climatic regions etc.

Innovation Centre
for Organic Farming

Motivation to start an organic seed network

Tove Mariegaard Pedersen, Innovation Centre for Organic Farming,
Aarhus, Denmark 23rd May 2024

Promilleafgiftsfonden
for frugtavl og gartnerbruget

DK Project: "Future-proof organic vegetable seeds" – 100 % organic seed in 2037

- Vegetable breeding centered in a few companies/countries
 - Large organic share but small market for seed (not large enough to invest in for larger seed companies)
 - Limited supply of organic vegetable seed, supply does not equal demand
 - High demand for quality and yield stability by growers in a competitive market
 - Wholesale marked (~90%) – require uniformity in varieties (F1 hybrids)
 - Specific varieties may be needed for local climate
- > Need for boosting supply and demand

<https://icoel.dk/media/ombpfyki/oekologiske-groensagsfroe.pdf>



Photos: Morten Tellina and Sven Hermansen

Motivation for international network

- Lack of communication between seed companies, farmers/growers and authorities across borders -> create a platform for exchange
- Countries with relatively small organic vegetable production area, breeding and seed production -> stronger together, provide data on market potential
- Insufficient supply and uneven distribution of available organic vegetable seed -> support use, distribution and production of organic seed (regional seed requests)
- Different derogation practices in neighboring countries incl. category 1 -> create more level playing field for farmers and companies (choose focus crops)
- Expert groups and action plans -> inspiration and exchange of successful implementation
- Lack of knowledge regarding variety testing in comparable climatic zones -> knowledge exchange
- Obstacles in seed production -> share and adjust derogation practice



Innovationscenter
for Økologisk Landbrug

2. Analysis of cat-1-crops in central/northern EU-countries & data collection in LiveSeeding

Presentation given by Kaja Gutzen, FiBL Germany e.V.

Category 1 Crops Analysis

According to (EU) 2018/848, Part I of Annex II, point 1.8.5.6, each EU Member State shall establish an official list (Category I list) of species, subspecies, or varieties (grouped if applicable) for which organic plant reproductive material (PRM) is available in sufficient quantity and for the appropriate varieties in their territory. Until now, access to the national Category I lists has been limited, although each EU Member State must maintain and publish its national Category I list, and the European Commission must publish the links to the national updated lists on a dedicated website. An analysis of 14 European countries revealed that six countries (Austria, Ireland, Iceland, Lithuania, Great-Britain, and Northern Ireland) do not maintain a Category I list, while eight countries (Belgium, Switzerland, Germany, Denmark, France, Luxembourg, Netherlands, Sweden) have at least one species listed under Category I. Agricultural species generally have higher availability, appearing on multiple Category I lists. For vegetable species, only cucumber and onion are listed in several countries, while most species appear on only one Category I list. Ornamental, forest, and fruit species have a very low availability and are rarely listed.

When one country lists a species in Category I, it can affect other countries. Some worry about competitive risks with less restrictive countries, while others see export opportunities. A harmonised approach is essential for the growth of the organic sector. Improved transparency, and increased collaboration between countries could streamline the categorisation process and level the playing field.

LiveSeeding activities

The LiveSeeding project aims to enhance transparency by providing a better overview of species categorisation on the EU Router Database. It will also collect and publish derogation reports. Furthermore, a seed data report will be published, estimating the supply and demand of organic seeds in Europe from 2019 to 2023, focusing on 12 key crops.

Category 1 Crops Analysis

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Regulation basics in a nutshell

Categories (EU) 2018/848	Availability of organic PRM	Derogation
Category I Point 1.8.5.6.	● ● ●	No derogations except for research, test in small-scale field trials, variety conservation purposes, product innovation
Category II Point 1.8.5.1.	● ●	Individual derogations possible
Category III Point 1.8.5.7.	●	General derogations possible



Regulation basics in a nutshell

The competent authorities of the Member States shall create an **official list of species, subspecies or varieties (grouped if applicable)** for which it is established that organic or in-conversion plant reproductive material is available in sufficient quantities and for the appropriate varieties in their territory.

No authorisations shall be issued for the species, subspecies or varieties included in that list in the territory of the Member State concerned pursuant to point 1.8.5.1 unless these are justified by one of the purposes referred to in point 1.8.5.1(d). If the quantity or quality of organic or in-conversion plant reproductive material available for a species, subspecies or variety on the list turns out to be insufficient or inappropriate, due to exceptional circumstances, the competent authorities of the Member States may remove a species, subspecies or variety from the list.

The competent authorities of the Member States shall keep their list updated on an annual basis and shall make that list publicly available.

By 30 June each year and for the first time by 30 June 2022, the competent authorities of the Member States shall transmit to the Commission and to the other Member States the **link to the internet website where the updated list is made publicly available. The Commission shall publish the links to the national updated lists on a dedicated website.**

(EU) 2018/848, Part I of Annex II, point 1.8.5.6



Useful links



Overview of databases by the EC:

https://agriculture.ec.europa.eu/farming/organic-farming/organic-production-and-products/organics-references_en

Overview of category 1 crops on EU Router Database:

https://www.seeds4organic.eu/Resources/Persistent/1/2/9/7/12970f729dc983dd08066f1da7193677e1517100/Category1_March2024.pdf

Analysed countries

14 countries

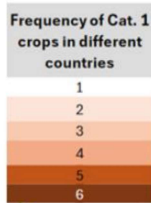
Category 1: BE, CH, DE, DK, FR, LU, NL, SE

No Category 1: AT, IR, IS, LT, UK-GB, UK-NIR



Agricultural

	BE	CH	DE	DK	FR	LU	NL	SE
Bristle oat		Barley	Buckwheat	Bentgrass	Barley	Grain maize	Barley	Wheat
Fodder radish		Emmer	Grain maize	Buckwheat	Cocks foot	Lupin	Buckwheat	
Grain maize		Grain maize	Lupin	Field bean	Field bean	Mustard	Field pea	
Mustard		Mustard	Mustard	Linseed	Field pea	Ryegrass	Fodder radish	
Spelt		Oat	Ryegrass	Lupin	Grain maize	Sugar beet	Grain maize	
Triticale		Phacelia	Rye	Phacelia	Lucerne	Trifolium	Lupin	
		Rye	Sugar beet	Potato	Mustard	Vetch	Lucerne	
		Spelt	Trifolium	Ryegrass	Oat	Wheat	Mustard	
		Triticale	Triticale	Sunflower	Potato		Oat	
		Wheat	Vetch	Timothy	Phacelia		Phacelia	
			Wheat	Trifolium	Ryegrass		Potato	
				Triticale	Rye		Rye	
				Vetch	Spelt		Ryegrass	
					Sunflower		Spelt	
					Triticale		Stevia	
					Wheat		Sunflower	
							Tall fescue	
							Timothy	
							Triticale	
							Trifolium	
							Vetch	
							Wheat	



Vegetable

BE	CH	DE	DK	FR	LU	NL	NL (cont.)	SE
Beetroot	Crunchy lettuce	Cucumber	Cucumber	Aubergine	Cucumber	Asparagus	Lactuca	Gardencress
Celery	Leek	Endive	Garlic	Brassica	Endive	Aztec sweetherb	Leek	Watercress
Chard	Onion	French bean	Luffa	Carrot	Gardencress	Beetroot	Mint	
Cucumber	Soybean	Gardencress	Marrow-stem kale	Celeriac	Onion	Broad bean	Onion	
Cucurbita	Wintercress	Onion	Mungbean	Chicory	Pumpkin	Caraway	Oregano	
French bean		Sweet pepper	Radish	Cucumber	Sweet pepper	Chard	Portulak	
Kohlrabi			Romaine	Cucurbita		Chili	Pumpkin	
Lactuca			Soybean	Fennel		Chicory	Radish	
Leek			Swede	Lactuca		Chervil	Rhubarb	
Onion				Leek		Coriander	Rocket	
Portulak				Onion		Cucumber	French bean	
Radish				Parsley		Dill	Savory	
Sweet pepper				Soybean		Fennel	Sweet pepper	
				Tomato		French bean	Tomato	
				Zucchini		Gardencress	Turnip	
						Garlic	Zucchini	
						Kohlrabi		



Ornamental

CH	CH (cont.)	CH (cont.)	DK	NL	SE	BE, DE, FR, LU
Achillea	Dianthus	Phyteuma	Bunias	Aloysia	Tulipa	/
Aconitum	Digitalis	Pimpinella	Calendula	Crocus		
Agrimonia	Filipendula	Potentilla	Chrysanthemum	Dahlia		
Alliaria	Geranium	Prunella	Papaver	Galium		
Allium	Geum	Pulsatilla	Sanguisorba	Gladiolus		
Anchusa	Globularia	Reseda	Serratella	Helichrysum		
Anthemis	Hippocrepis	Salvia	Viola	Hyacinthus		
Anthericum	Hypericum	Sanguisorba		Lavandula		
Aquilegia	Inula	Saponaria		Melissa		
Artemisia	Iris	Scabiosa		Narcissus		
Aster	Isatis	Scrophularia		Salvia		
Astrantia	Knautia	Silene		Santolina		
Atropa	Lathyrus	Solanum		Sanguisorba		
Bupthalmum	Leonurus	Solidago		Tagetes		
Calamintha	Leucanthemum	Stachys		Thymus		
Campanula	Linaria	Succisa		Tulipa		
Centaurea	Lotus	Tanacetum				
Chelidonium	Malva	Teucrium				
Cichorium	Medicago	Thymus				
Clematis	Melilotus	Tragopogon				
Clinopodium	Myosotis	Tulipa				
Cynoglossum	Ononis	Verbascum				
Daucus	Onopordium	Veronica				



Forest & Fruit

DK	NL	BE, CH, DE, FR, LU, SE
<i>Abies normanniana</i>	Strawberry	/
<i>Abies procera</i>		
<i>Picea abies</i>		



Example: Carrot



Species subgroups on Category I:
FR: Carrot nantaise orange

Source: www.oekolandbau.de / Copyright BLE / Dominic Menzler



Example: Leek



Source: www.oekolandbau.de / Copyright BLE / Thomas Stephan



Species subgroups on Category I:

BE: Summer, Autumn

CH: Planting material

FR: Leek OP (non-hybrid), Hybrid leek

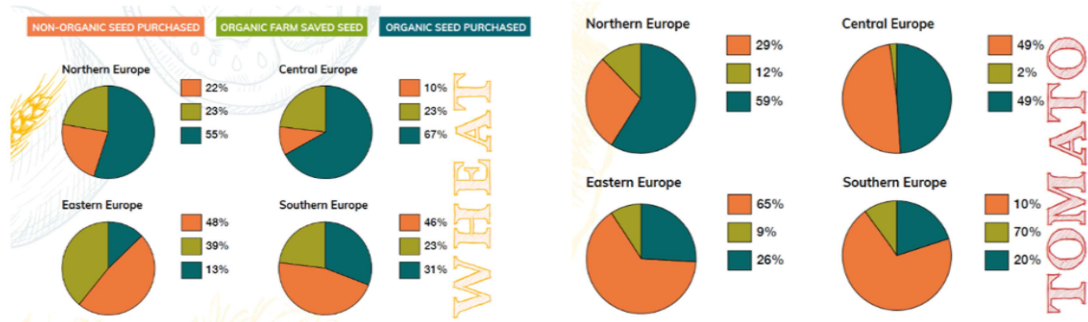
NL: Leek, excluding wintering and regrown leeks

LiveSeeding activities

- **EU Router Database (www.seeds4organic.eu):** New features to improve transparency
 - National species/sub-species categorisation according to Cat. I-III
 - Central repository for yearly derogation reports
- **Seed data report:**
 - Article "Estimating Supply and Demand of Organic Seeds in Europe Using Survey Data and MI Techniques" (<https://doi.org/10.3390/su141710761>)
 - Liveseed report „The State of Organic Seed in Europe“ (https://www.liveseed.eu/wp-content/uploads/2021/03/Booklet2-LIVESEED_2021_web.pdf)
 - LiveSeeding: Continue data collection on organic seed supply and demand, 2019-2023, 12 focus crops



Average total potential demand in different European regions in 2016



Liveseed report „The State of Organic Seed in Europe“

(https://www.liveseed.eu/wp-content/uploads/2021/03/Booklet2-LIVESEED_2021_web.pdf)



3. Input from DK: Expert groups and equivalent variety lists to support organic seed use

Presentation given by Tove Mariegaard Pedersen, ICOEL Denmark

The use of national seed expert groups started in the Netherlands more than 20 years ago and has proven to be a supportive tool to stimulate communication among stakeholders regarding organic seed issues with strong involvement of growers and seed companies. It is a support for authorities in charge of organic seed databases and for the process of moving more species and subgroups to Category 1 (no derogation). New seed expert groups are under implementation in Denmark, and also the use of equivalent variety lists. The equivalent variety lists are meant for support in the derogation process. An equivalent variety is a variety that has such characteristics that it can be used instead of a requested variety and can be suggested to farmers applying for derogation. It will be more difficult to obtain a derogation for the use of a requested variety if there are equivalent varieties with characteristics that equals the requested variety. Experiences with equivalence lists are still very limited.

Discussion

Comment: In Denmark species are only categorized as category 1 in consent with specialist groups holding representatives from the farmers. It is very important to participate in meetings, administration of organic seeds is lots of work, so extra meetings are difficult due to resources.

It was requested how operators/farmers accept the equivalent variety system? What happens if an operator requests a certain variety? Tove: only in strawberry so far, and here it is a special case because you need to order in advance. Other than that, not so much experience yet.

Comment: In Germany difficult to implement. There is currently just a list of requested apple varieties.

Comment: good idea to have equivalent varieties. Why not on higher level, that not each country has to develop one. Database made on basis of equivalent varieties. Try to find efficient way work-load-wise. If you can see there are enough equivalent varieties of a species, it will be a good overview.

Comment: expert groups should also work on future development, technical difficulties, research to be done, to bring together knowledge. In organic regulation there are too many rules and details, which makes it hard for companies and farmers.

Comment: make subgroups more specific, instead of equivalent list, so to harmonize subgroup species.

Comment: very important that seed suppliers will give all data of cultivar, otherwise it is very difficult to work with derogations and for growers they can use it as excuse to not use that available cultivar. About subgroups, to have harmonized ripening groups for potatoes.

Question to the participants to post the number and composition of expert groups in the chat:

Comment: in the Netherlands there are 4 expert groups: 1. open vegetables and potatoes 2. agricultural crops 3. covered vegetables and fruits 4. vegetative plant propagation material. Process of the expert groups in NL: Annually, expert groups (growers & suppliers) assess the organic supply. (Sub)crops are classified into a category based on objective criteria. The expert groups advise the Ministry of Agriculture, which determines the National Annex annually.

Comment: in France there are 5 expert groups in France: 1. field crops 2. fodder and cover 3. Vegetable 4. vine plant 5. fruit plant, small fruit, aromatic

Comment: in Sweden there are 4 expert groups: 1: Cereal and pulses 2. Fodder plant seed 3. Potatoes 4. Vegetables and fruit.

Comment: in Germany there are three expert groups: 1. horticultural, 2. arable, 3. forest/fruit/ornamental

Comment: in the United Kingdom there are four expert groups: 1. horticulture, 2. arable, 3. grass & forage, and 4. potatoes

Comment: in Ireland there is one expert group covering all crops.

Comment: Luxembourg: As far as I know, there is no expert group in Luxembourg yet. We have the organisation SEED, that works on saving vegetable-seeds in Luxembourg, and they work on seed regulations as well, but they are not specialised on organic seeds.

Comment: in Switzerland expert groups organized by Bio Suisse for each plant production section, they take care for categorization of species according to their availability, lists of recommended varieties, contribute to regulatory questions. They consist of farmers, PRM producers, FiBL and other advisors, and staff of BioSuisse.

Innovation Centre
for Organic Farming

Seed expert groups

Tove Mariegaard Pedersen, Innovation Centre for Organic Farming,
Aarhus, Denmark 23rd May 2024



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Seed expert groups

- Seed expert groups can stimulate communication between stakeholders
- Seed expert groups can give advice to the authorities on crop specific seed issues
- Farmers/growers and seed companies must be represented in seed expert groups.



Photo: Morten Telling

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for Økologisk Landbrug

Category 1 and seed expert groups

- The path to Category 1 - obligatory from 2022 in all EU-countries to evaluate crops
- Important to involve stakeholders in the process
- Check availability of most important varieties
- Check if there are sufficient amounts of seed and enough different and suitable varieties from different producers
- Check possibility for subdivision in variety groups based on season, type or market



Seed expert groups in Denmark

The setup in Denmark is under revision and only in the beginning of implementation!

- Established in 2021
 - Main tasks of seed expert groups – to give advice on :
 - Placement of species and subgroups in Category I, II and III
 - Equivalent varieties
 - Original plan was up to 15 groups
- Representatives from (preferably):
- The Danish Agricultural Agency
 - Aarhus University
 - Field trial station
 - Innovation Centre for Organic Farming
 - Suppliers of plant reproductive material
 - Breeders
 - Farmers consultants
 - Farmers/growers



Assessment of variety groups and species

According to the paper of reference by the Danish Agricultural Agency some parameters are given significant value in the assessment of variety groups and species:

- Suitability for cultivation in organic conditions
- Resistance and tolerance to diseases
- Growing season
- Drought and cold tolerance
- Height
- Soil conditions
- Competitiveness
- Special properties
- Organic variety trials
- Etc.

Parameters given limited value in the assessment:

- Yield ratio
- Yield potential
- Conventional field trials

Equivalent varieties

- For support in the derogation process
- An equivalent variety has characteristics that means it can be used instead of the requested variety
- In the starting point, it is not possible to obtain a derogation for the use of a requested variety if there are equivalent varieties with characteristics that equals the requested variety

Equivalent varieties

So far only in strawberry – grouped for open land and production under cover and for wholesale and direct sale

	Tidlighed	Sortsnavn	Ækvivalens
Produktion til:	Tidlig	Flair	Rumba, Honeoye, Dahli
Engros/supermarked	Tidlig	Honeoye*	Rumba, Flair, Dahli
Dyrkningsform:	Tidlig	Rumba	Flair, Honeoye, Dahli, Verdi
Friland	Tidlig	Dahli	Flair, Honeoye, Rumba
Type:	Tidlig	Verdi	Rumba
Alle = frigoplanter	Tidlig	Allegro	
	Middel	Sonata	Sonsation
	Middel	Sonsation	Sonata
	Middel	Falco	
	Middel	Salsa*	
	Sen	Florence	Faith
	Sen	Faith	Florence
	Sen	Malwina	

Discussion

- Examples of succesful/unsuccesful implementation of seed expert groups or the use of equivalent varieties lists?
- How many different seed expert groups do you have in your country?
- When and how often do you meet?
- Farmers/growers involvement?
- Other issues/questions..



4. Input from DE – Roadmaps in Germany - a national project to support supply of organic seed

Presentation given by Freya Schäfer, FiBL Germany e.V.

The national project aims to increase the supply of organic PRM in Germany. The project is organised as a multi-stakeholder project where experts along the whole supply chain are involved in the project. For arable crops, vegetable crops, herbs, fruits, and vine the current status quo on organic PRM will be estimated, as it will be possible to phase out derogations by the year 2036. For each crop bottlenecks and potential incentives are discussed to upscale organic PRM use. The first results of the project reveal, that for vegetables, herbs, fruit and vine an exchange with actors from other countries would be beneficiary. These crops are often multiplied outside Germany, sometimes even outside the EU. This is the case with the three crops carrot, onion and leek (see PPT). Therefore, we are aiming to improve the cross-country exchange between actors and are open to be involved in further meetings.

Discussion

Comment: contribution to carrot case, looking at Cat1 in France, what are the main varieties used and how farmers respond to Cat 1?

Comment: What are the main quality criteria for carrots, limiting the varieties used? In supermarkets? Answer: carrot of certain size in plastic bag, with very strict rules, this is the case for 90% of carrots. If farmers don't deliver a certain carrot size, they go to processed food.

Comment: organic production should be the same as conventional, in terms of uniformity etc. And if you want high volumes of organic, you need to have the same quality standard. On the farmers market you can explain certain lack of quality.

Comment: hard to know the real argument from grower, if it is because of seed price or if it a more complicated argument where they don't want to move to organic seeds. We as an organic movement need to make up our mind if we want organic seed or not, that is very important. Organic breeding is developing, but we need a bold decision.

Comment: we need to make other organic varieties know in the organic market. We need to be more flexible towards other varieties that are also good.

Comment: Derogations need to be implemented more seriously across the European countries. Of course, farmers are preferring cheaper non-organic seed but everybody

producing organic seed should get guaranteed that first organic seed need to be sold, so that he can develop a business.

Comment: legume crops, organic farmers prefer conventional seeds, because of price and quality. They don't have same trust in organic seeds. For small high-quality crops there is very little competition, so farmers will choose conventional.


Comment: I think the responsibility of retailers are not taken into account enough, they refer always to consumer expectations, this is too easy

Comment: I think it needs much more information with the value chain. It is not the consumer asking for 18 cm long carrots, but it is easier for supermarkets to process and pack, but now with new techniques you can put carrots into a bag based on weight not by size. I fully agree that organic should not try to copy the conventional products which has been trimmed for industrial production.

Comment: In the UK we did use a % approach for potatoes in the past, which did work to raise the use of organic seed and variety development, it has also worked well for grass and forage seed.


Comment: There is a contradiction: the National Annex (cat. 1) is based on the national demand and availability of seeds. But some growers of young plants also export these plants to other member state. This effects the National Annex.

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Roadmaps - Improving the availability of organic plant reproductive material in Germany

Project lead: Freya Schäfer, FiBL Deutschland e.V.
September 2023 – August 2026
Project Partner: Bioland Beratung GmbH

Gefördert durch  

aufgrund eines Beschlusses des Deutschen Bundestages



A national roadmap towards 100% organic seed

Main findings

- Based on surveys and an extensive stakeholder consultation process over four years in 23 European countries, the current increase in production and use of organic seed is being slower than how to reach the goal of 100% organic seed in 2030.
- Seed companies need reliable data on the actual demand for organic seed and clear deadlines for development for the different crops to invest in scaling up organic seed production.
- Increased availability of organic seed from suitable and locally adapted varieties is needed to maintain farmers to use more organic seed.
- At the national level, a roadmap with intermediate goals should be developed to phase-out derogations by 2030.
- LIVESEED developed a decision tree for national seed export groups to facilitate making a roadmap on a crop level.

Key policy recommendations

- LIVESEED developed a range of recommendations for policymakers on how to increase the availability and use of organic seed considerably, in order to comply with the new organic regulation which bans the use of non-organic seed in organic farming by 2030 (Article 12, Regulation (EU) 2018/848).
- Member states' national organic action plans should include measures to improve the national seed databases, establish or strengthen existing organic seed export groups and stimulate organic plant breeding and other breeding.
- Seed export groups are recommended to develop a national roadmap towards 100% organic seed using the LIVESEED framework, setting the national and intermediate goals to reach eventually 100% organic seed use for a specific crop.



Policy Brief of LIVESEED

https://www.liveseed.eu/wp-content/uploads/2021/09/Policy-brief-RoadMap-National-Authorities_final_compressed-4.pdf



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www.Liveseed.eu

Horizon 2020 project 2017-2021

WP1: Regulation & policy framework regarding production, use, and transparency of organic seed

www.Liveseeding.eu

Horizon Europe project 2022-2026

WP4: Improve organic seed market transparency



Roadmaps project in Germany

- Multi-actor approach along the supply chain (from breeding to retail) with more than 200 actors

Analysed crop groups:

arable



horticultural



herbs



fruit



vine



- ornamentals are covered by a separate project, coordinated by Bioland



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Some first results

In general, organic PRM supply of arable crops is higher than in horticultural, herb, fruit and vine crops.



Example of leek in DE

- Currently single derogation (Cat 2)
- Current use of organic seed in DE is limited
- Most organic seed is sold to NL and FR (both countries set leek to Cat 1)
- Cat 1 in DE could be expected in some few years
- Supplier need to upscale organic seed production



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Example of onion in DE



- Yellow type "Rijnsburger" since 2016 on Cat 1
- Red type "Rijnsburger" and yellow "American" still on Cat 2
- Current use of organic seed is good (estimated at about 60-70% organic seed use)
- Cat 1 could be possible in future



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Example of carrot in DE



- About 90% of organic carrots in DE are sold via supermarkets (mainly in bags)
 - Certain quality criteria are requested (amount and size of carrots per bag)
 - Mainly two varieties deliver this qualities (Bolero and Nerac)
 - Seed propagation under organic is limited
 - New varieties need to be developed until 2036
- and/or
- Supermarkets need to adapt new quality criteria



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Large investments in the organic seed and breeding sector are needed!

- Many bottlenecks can't be solved at national level
- Exchange on vegetables, herbs, fruits & wine is needed and welcomed



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all pictures in this ppt taken from www.oekolandbau.de

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5. Input from CH – Status-quo on organic seed supply and revision of organic regulation

Presentation given by Matthias Klaiss

As Switzerland is not part of the European Union, the organic regulation 2018/848 does not apply. However, it is envisaged to ensure equivalence with the EU organic directives, with the same goal being pursued. With regard to organic seed, a vegetative planting material, following differentiation is in place: the goal of reaching 100% organic PRM use by end of 2036 is not intended. Switzerland aims to promote and stimulate the use of organic PRM via market incentives, increased transparency and private sector ambitions. A unique “steering taxes system” that cuts off price difference between organic and conventional PRM is in place to finance organic breeding activities. The system is applied in potatoes, some arable crops, and fruit trees. However, this system is a private agreement between BioSuisse members. It works quite well as 95% of organic farms are part of the farming organisation BioSuisse in Switzerland. It reduces the economic incentive for farmers to use non-organic PRM.

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Relevant Changes in Swiss Organic Regulations in compliance to EU Organic Regulations

Live Seeding Cross Country Exchange, Thursday Mai 23rd,
Matthias.Klaiss@fibl.org

The Process of Adaption to EU Organic Regulations

- not complete EU eco regulation adopted but existing organic regulation adapted to EU to ensure equivalence with the EU organic directives.
- Equivalence = “pursuing the same goal”
- FiBL experts compared on behalf of FOAG the new EU standard with the national Bio-Verordnung, SR 910.18
- FOAG published the consultation for adaptations to relevant stakeholders in Switzerland, feedback closed 1st of May, implementation 2025
- 7900 Organic farming operations in Switzerland, > 95% Bio Suisse, 18% of land use area, ~16 % of Swiss farms are Bio
- Bio Suisse categorisation of PRM much more strict than Federal Organic categorisations --> organicxseeds

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The FiBL Organic Seed Service

- Management of derogations for conventional / non BS organic PRM for swiss organic agriculture, availability-categorisation-system of crops
- organicxseeds in Switzerland
- Consulting of organic farming stakeholders concerning PRM on behalf of Bio Suisse (BS), with many FiBL experts
- Lists of recommended varieties with Bio Suisse
- Annual reporting to FOAG
- Coordination of BS steering taxes system (potatoes and other arable crops, fruit trees), skimming off price difference organic / conventional PRM

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Changes organic plant reproductive material system

- Formerly no official annex I, publication of list is now delegated to FiBL
- Categorisation of species by FiBL (with BS expert groups)
- annual report und updated list (annex I) with crops in «Stufe I» = no derogation for production of crops
- Goal of 100 % organic PRM by 2036 not intended
 - Market stimulation by market transparency, private sector ambition
 - Mandatory confirmation of non availability for crops in category 3
- Aspects about heterogenous materials from new EU Organic Regulations will not be taken into account.
 - Niche variety regulations in CH

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Three categories – towards 100 % organic seed availability

Category	Derogation	Crops in Switzerland
Category I Availability of suitable organic varieties ~100 %	Derogations only for research, diversity preservation and seed production	Mais, Soja, Cereals, seeds for sprouts
Category II Organic evaluated varieties available	Single derogation	Potatoes, other grain legumes, oil crops, all vegetative material
Category III Some organic PRM available No evaluation yet	General derogation	Lot of vegetable seeds, mixtures, niche cultures, ornamental, biodiversity,

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Status Quo share of organic PRM for some crops (sales and estimates)

- Fruits 30 %
- Berries 60 %
- Potatoes 60 %, 9 varieties organic but ~ 30 varieties used
- Wheat 100 %
- Soybean 90 %
- Vegetable seeds 50 %
depending on species 0-75%
- Vegetables vegetative PRM 75%
- Vine plants 10 %
- Ornamental PRM <5%

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Challenges with increasing availability of organic PRM

- Virus free pruning material (example fruits, berries)
- Demand for high quality PRM (large production batches)
- Diversity of varieties used vs availability of organic PRM
- Small market in CH
- Quality vs organic (AGFF seed mixtures forage)
- Super diverse biodiversity seed mixtures
- PRM of suitable varieties are not available/ produced for organic
- Discontinuation of PRM production for suitable varieties

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Discussion points for future meetings

- Challenges and approaches to solutions
- How to facilitate increased cooperation between EU and CH actors
- How can PVM producers be specifically supported in order to promote supply of organic PRM (measures/incentives)?
- What measures can be taken to facilitate the market?
- Next steps in the cooperation ?

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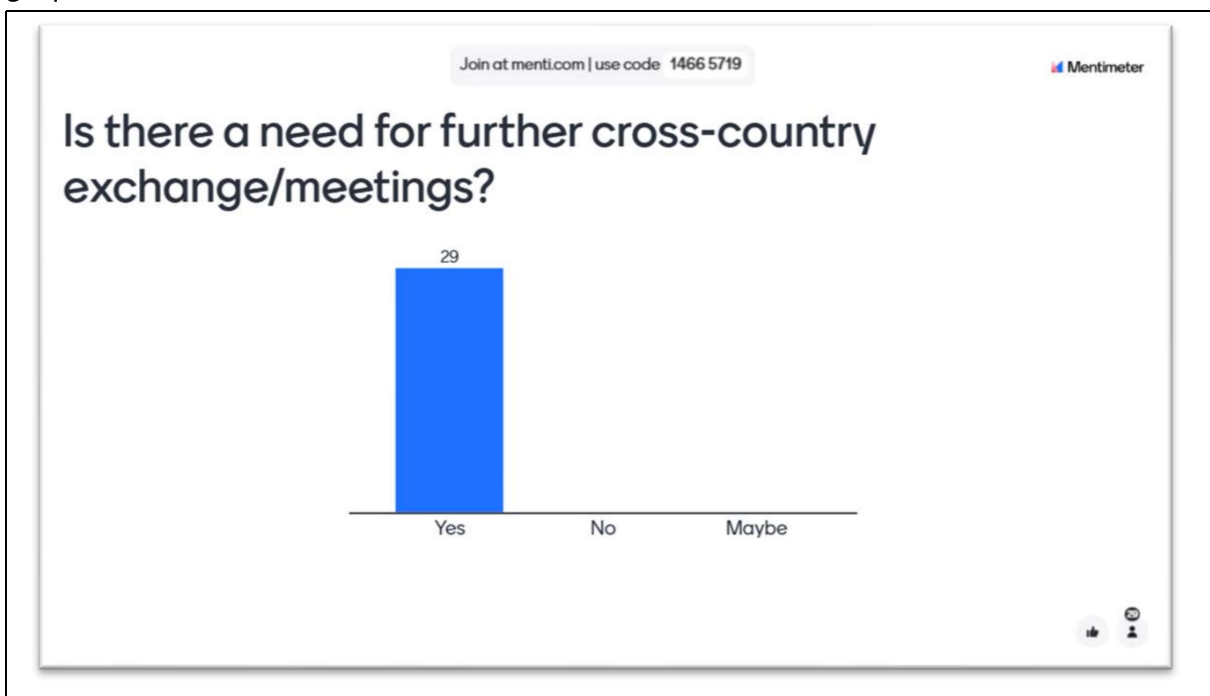
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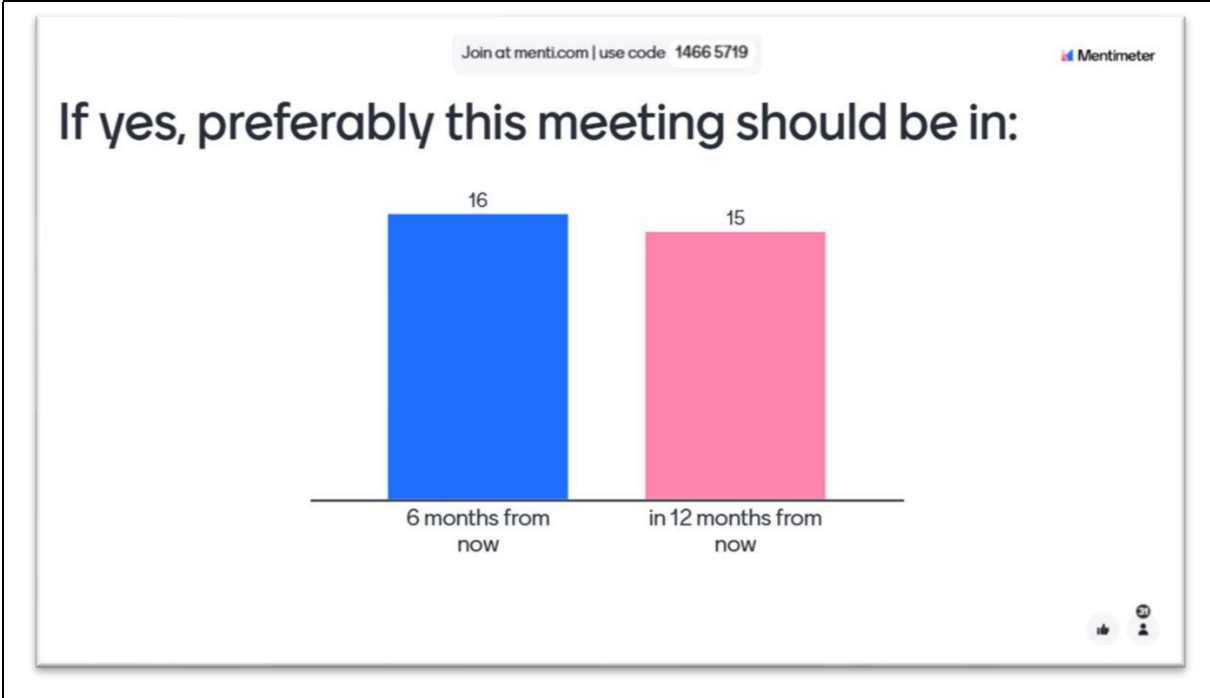
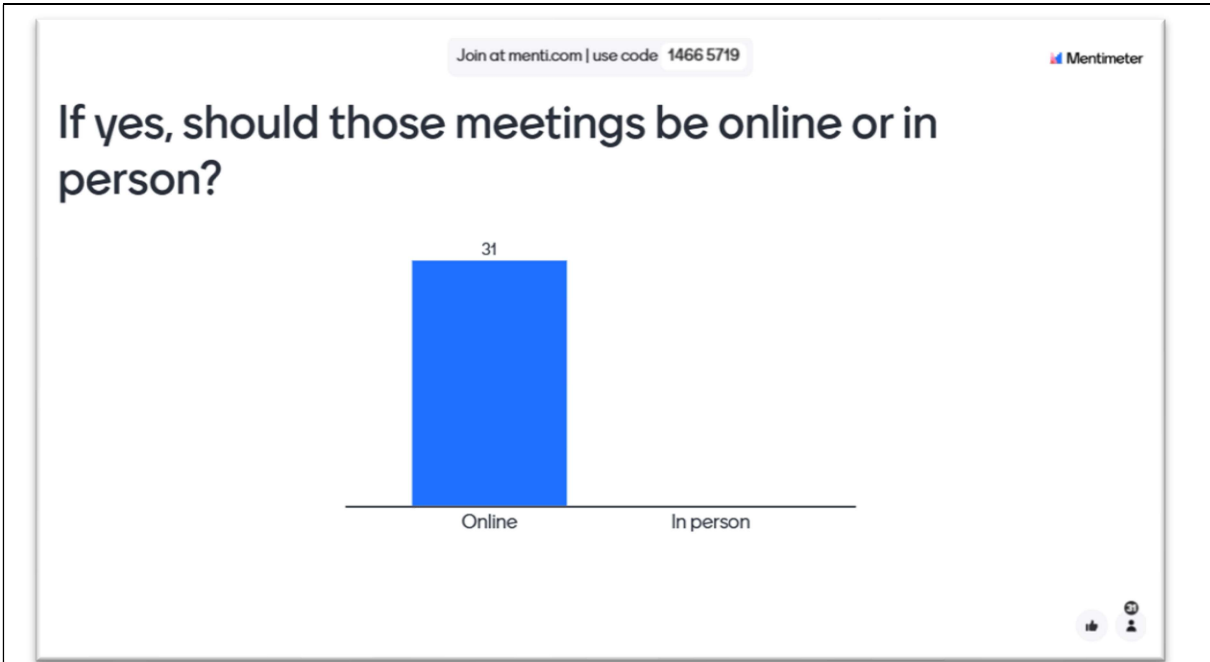
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6. Results of Menti-Meter voting

Via the online tool "Mentimeter", six questions were asked to evaluate the meeting and identify further topics for a next meeting. The responses are displayed in the graphs.





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Who else should be invited to such meetings? Please write (name), organization, role and country

9 responses

Northern European Countries (Scandinavia) and the Baltic Countries.	invite all EU countries CH & UK, more seed producers	IBLA: Institut für biologische Landwirtschaft und Agrarökologie.LSG: Luxemburger Saatbaugenossenschaft	representatives from southern countries e.g. Spain, where a lot of organic vegetables is produced
Breeders of potatoes, fruit, etc	I think it was informative with participants from so many stakeholders, but I would also like to meet in a more specialized forum, eg. derogations.	vegetable seeds	paying for derogation
Concrete positive solutions for one crop category 1 in one country			

👍 👤

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What topics should be discussed? E.g. type of crops, derogation practices etc.

18 responses

young plant export	Simplyfying the rules	how to get harmonization on EU level	registration 1.8.6 PRM
Derogations practices, harmonising hereoff	on the percentage approach, harmonize subgroups,	Derogation practices and specially decision tree to move species between the 3 categories	how the regulation could be harmonized inbetween the countries, to make it more transparent and easier
more practical examples of how to streamline/communicate between countries	Derogations practices, harmonising hereoff	Have more understanding of breeding organic PRM, for instance what is allowed or not under point 1.8.6.	veg. propagated species
harmonizing derogation practices	vegetative propagation material, survey of organic nurseries		minor crops, protein crops etc

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Mentimeter

Are you aware if your country is working on a national project to increase supply and demand of organic seed? If yes, please add your name + country

3 responses

important to have the organic offer on the database. (basis to know the availability). Not every country needs to breed?

we should check with EU project InnoBreed on organic fruit olive and grape

A general question: what is the impact of the possibility to 'use' point 1.8.6. on the production of organic PRM (point 1.8.2. if I'm not wrong).

