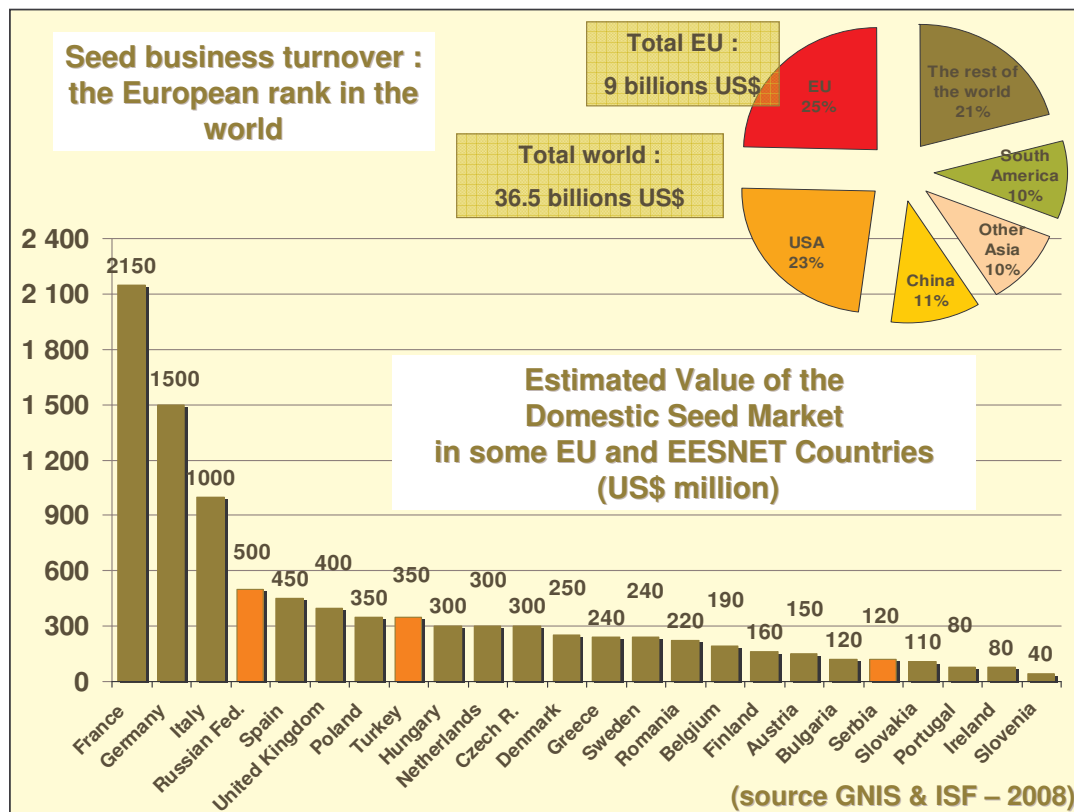


9th EESNET Meeting
Cracow, 8-10 November 2009

**European Seed Market and
Prospect of Regional Seed
Trade Development**

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GNIS
International relation service





The sources of these data are GNIS for the French seed production and ISF for the other data.

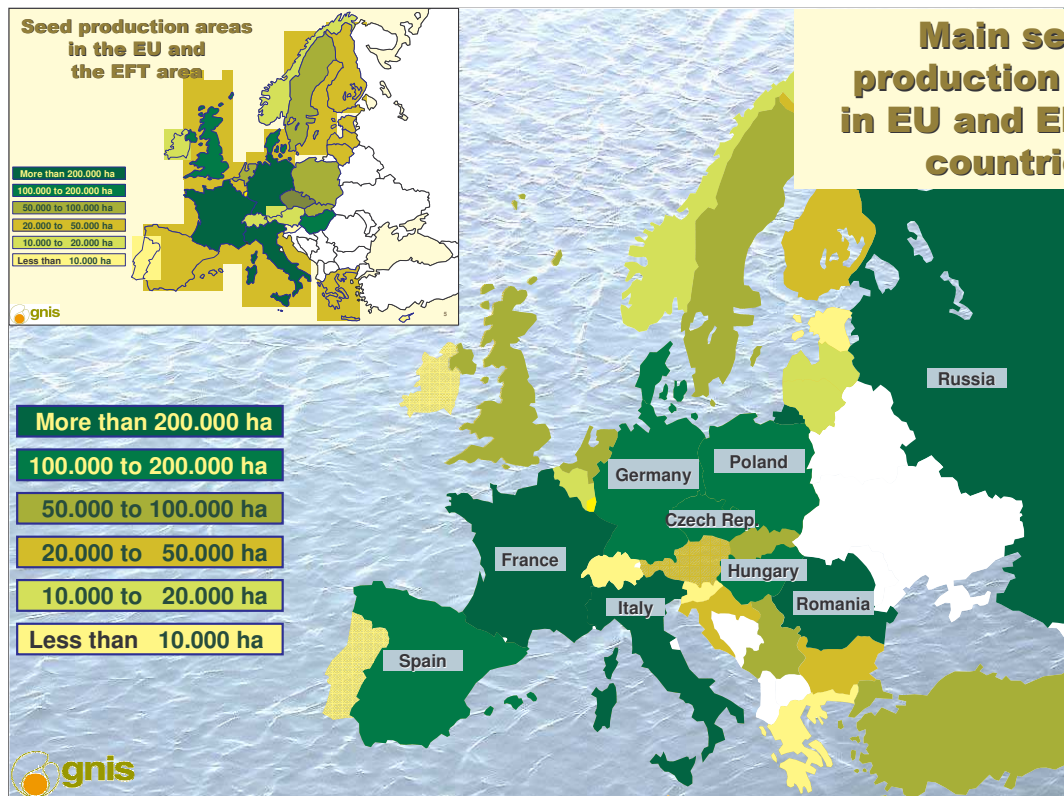
EU represents 25% of the global market estimated in 2008 at 36.6 billions \$.

The three main seed producers in the European region are : France, Germany, Italy;

then followed by a group of countries: Russian Federation, Spain, UK, Poland, Turkey ...

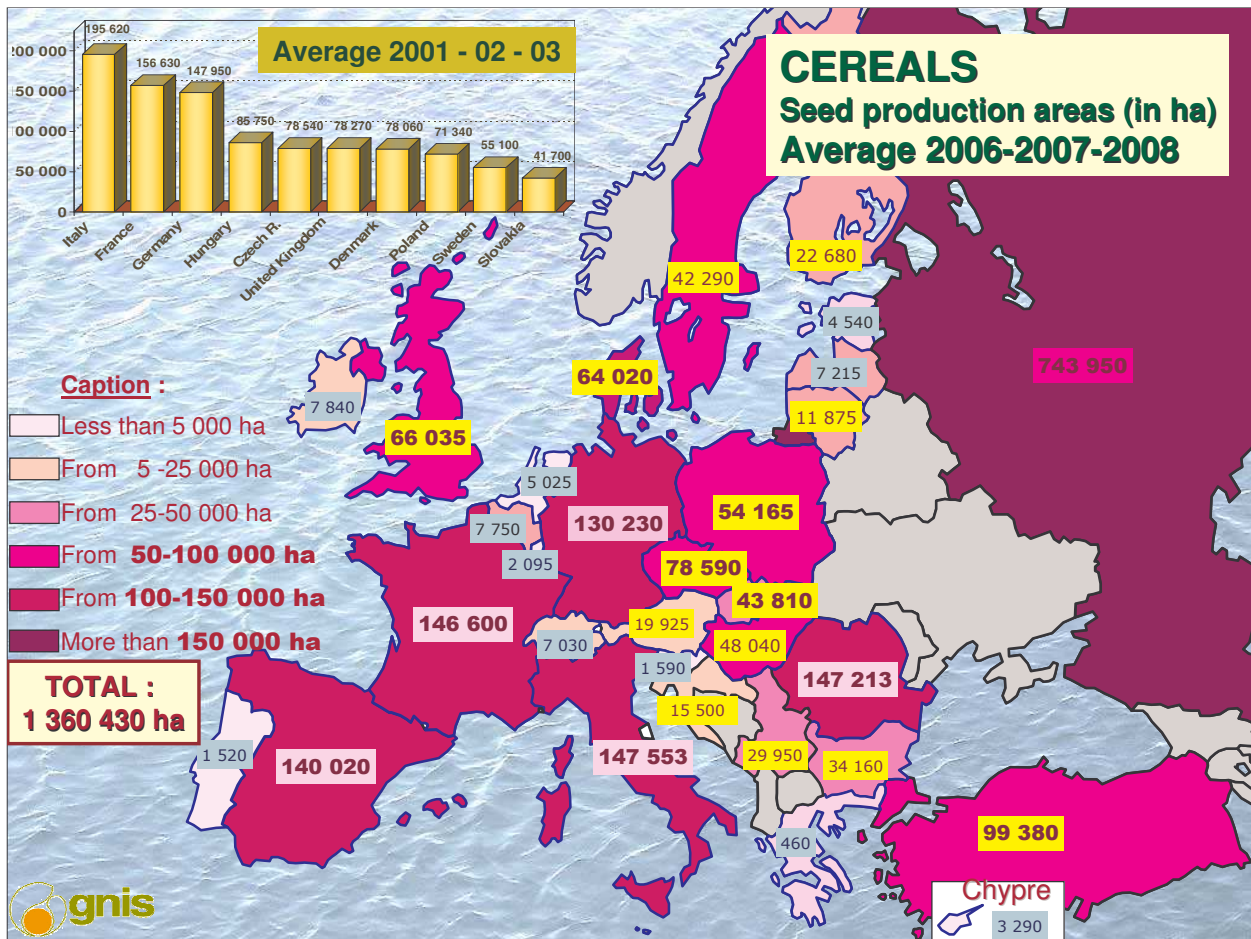
Seed production in Europe

source : European Seed Certification Agencies Association



The map, on the left side, shows the situation in 2005, the second map shows the situation in 2008.

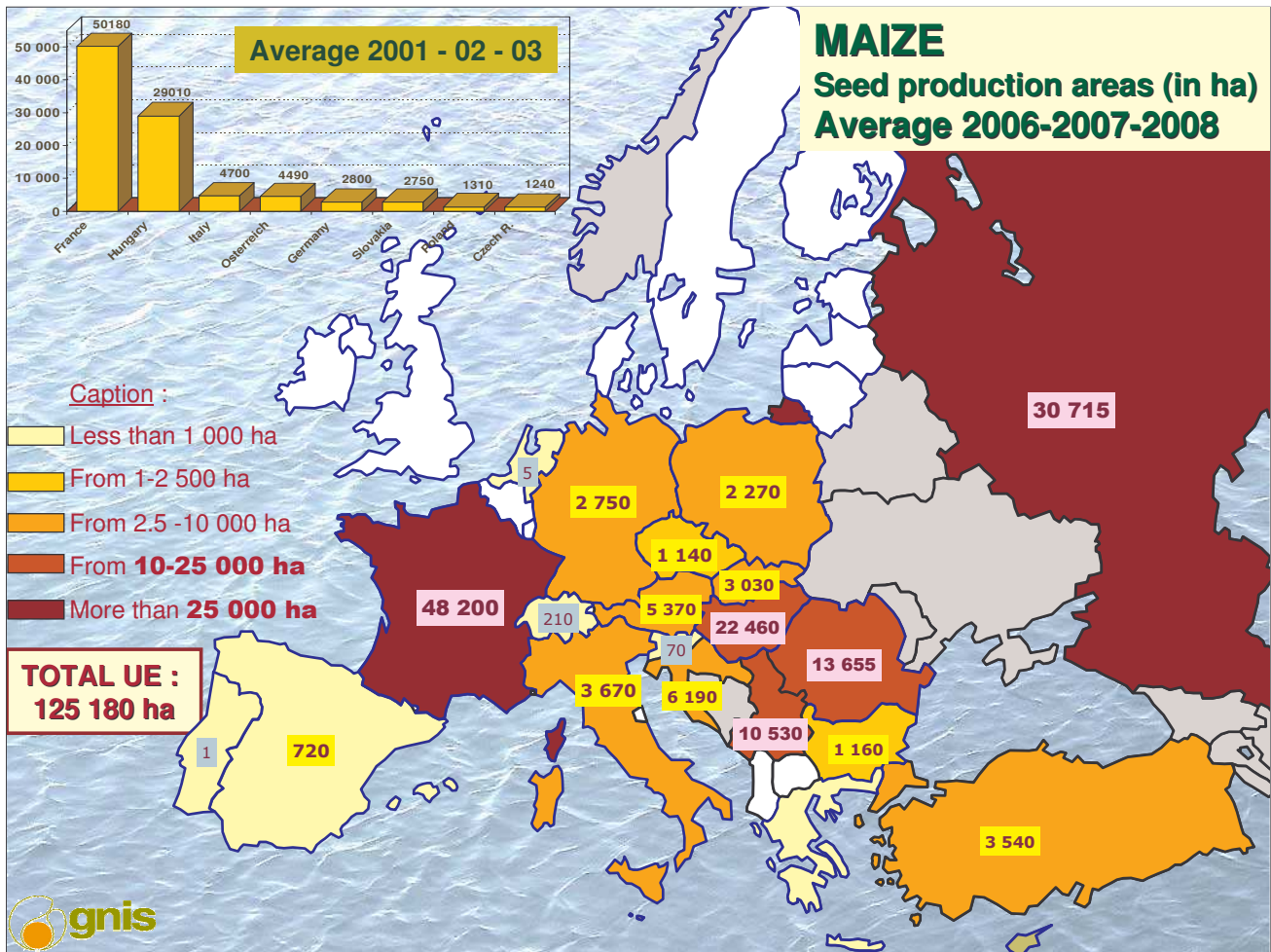
We can see that some eastern countries have increased their seed production during this time, such as Poland, Czech republic, Hungary and Romania. This increase could correspond to a transfer of some seed production from Germany in particular to these eastern countries.



The Russian Federation is the first cereal seed producer, with more than 740 000 ha.

Then, there is a group of 5 countries where the seed production area is between 130 and 150.000 ha: Romania, Italia, France, Spain and Germany.

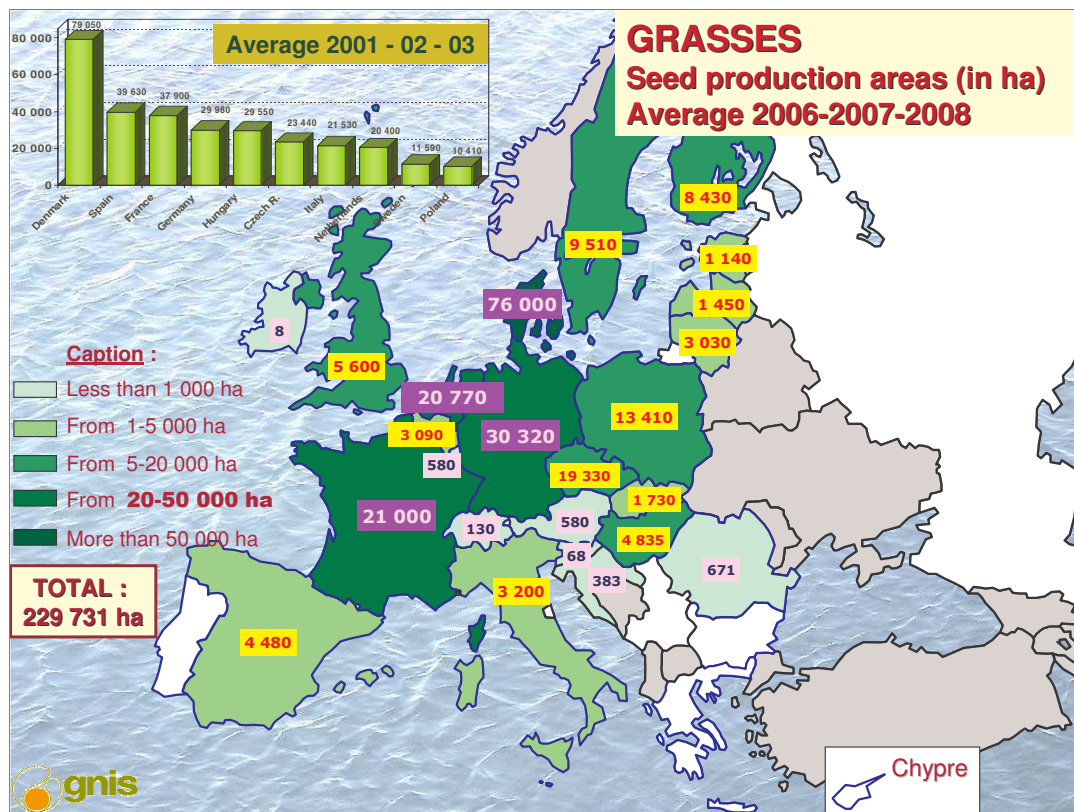
The comparison between the periods 2001/2003 and 2006/2008 shows a decrease in the Italian cereal seed production.



The two main maize seed producers are France with 48.000 ha and Russian Federation with 30.000ha.

Then we find Hungary, Romania, and Serbia.

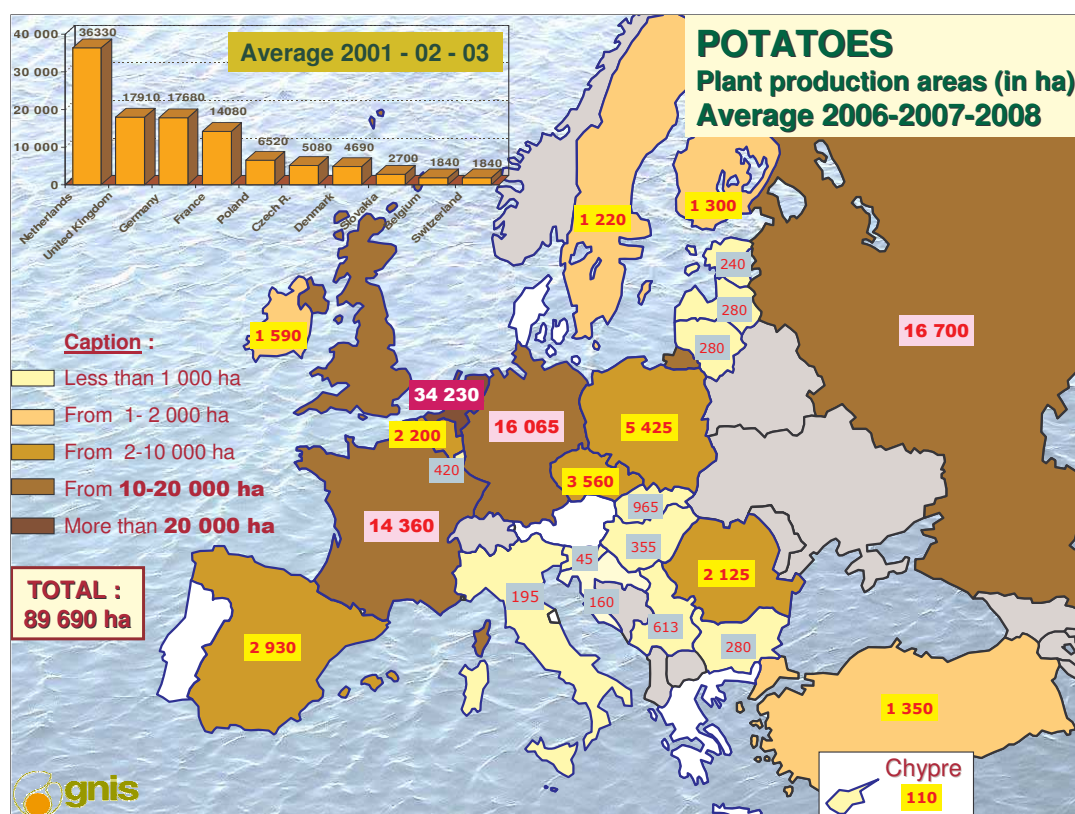
The comparison between the periods 2001/2003 and 2006/2008 shows a decrease in the French maize seed production area.



The main European grasses seed producer is Denmark with 76.000 ha.

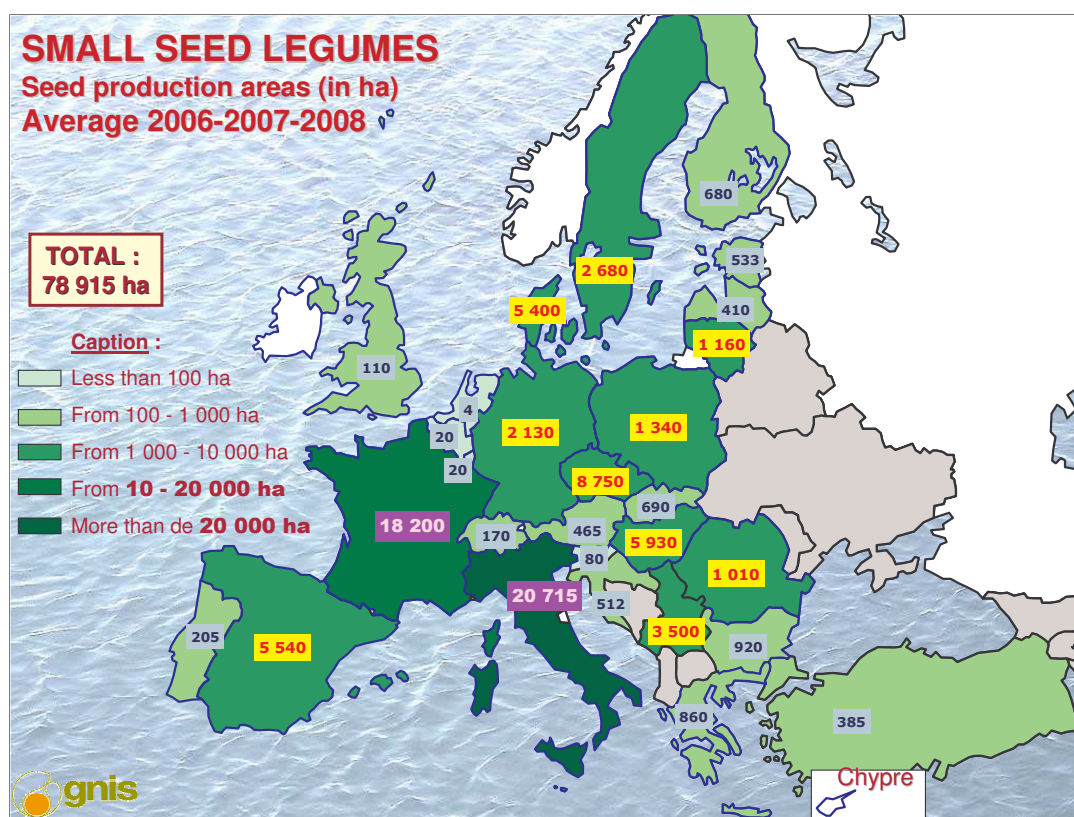
Then we find 3 countries: Germany, France and Netherlands.

The comparison between the periods 2001/2003 and 2006/2008 shows a decrease in the Italian and Spanish grasses seed production area.

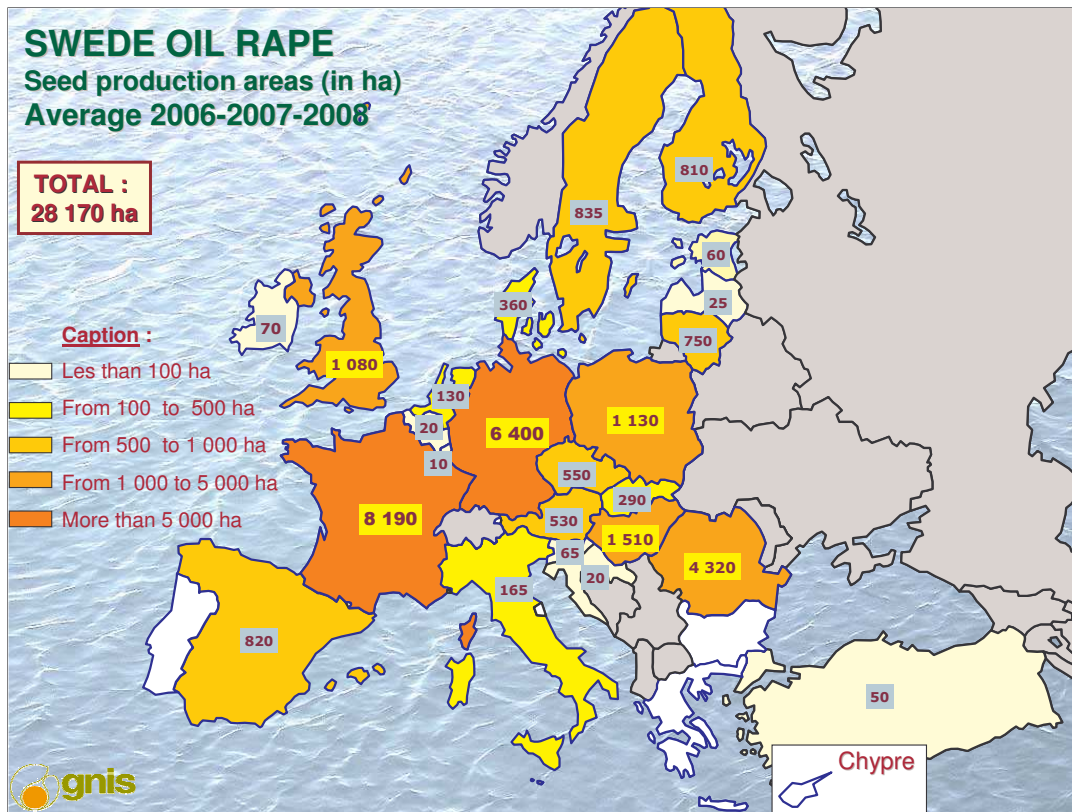


The main European potato seed producers is Netherlands with more than 34 000 ha, followed by Russian Federation, Germany, United kingdom and France.

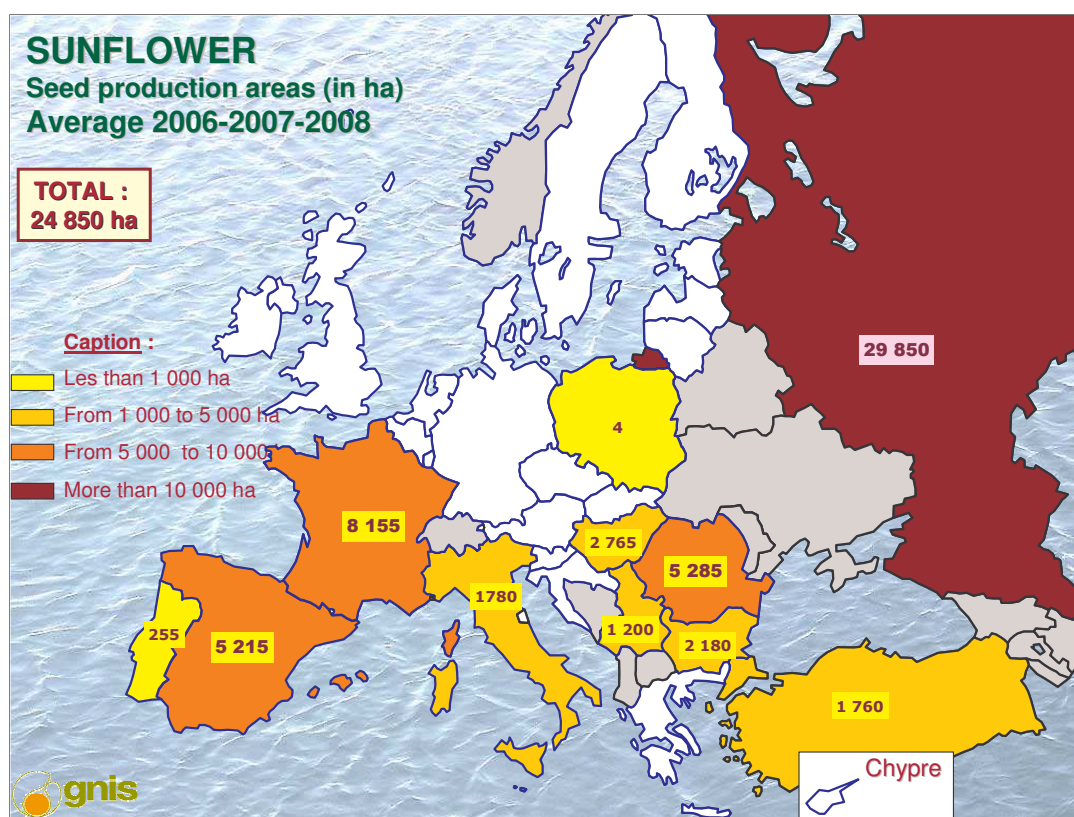
The comparison between the periods 2001/2003 and 2006/2008 shows a decrease in the Dutch potato seed production area.



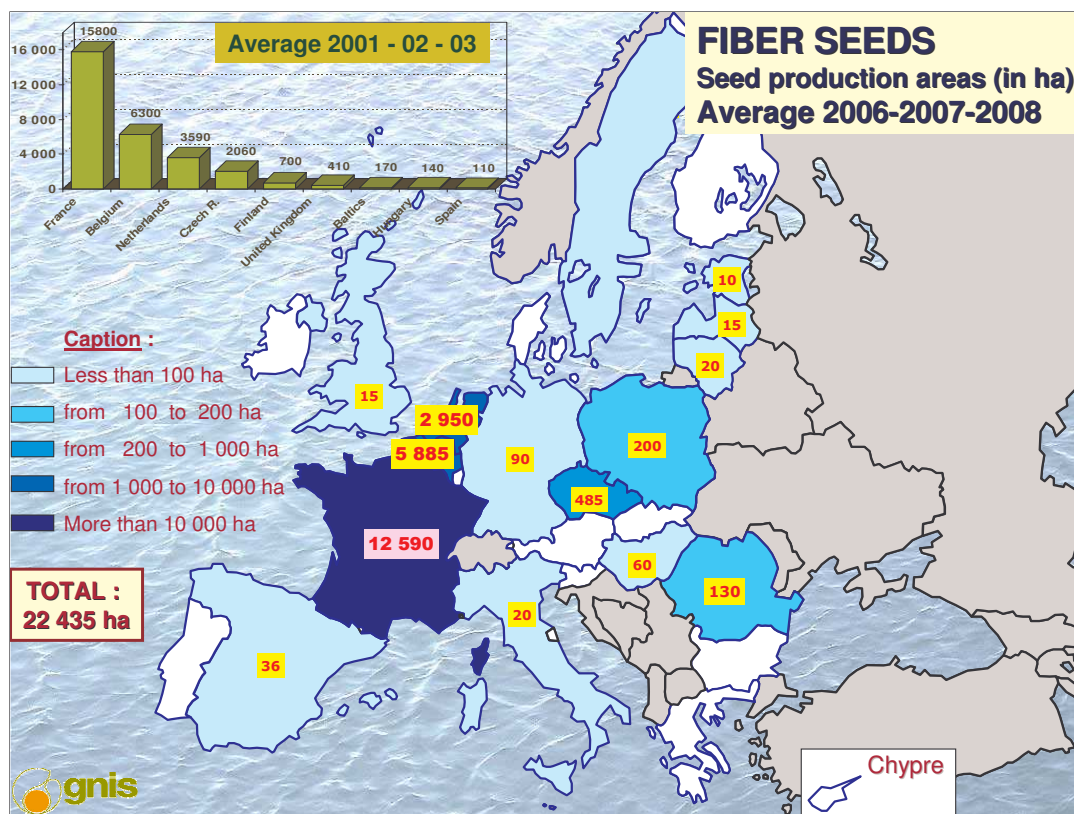
The two main European legumes seed producers are Italy with more than 20 000 ha, followed by France with 18 000 ha.



The two main European oil rape seed producers are France with more than 8 000 ha, followed by Germany with more than 6 000 ha. .

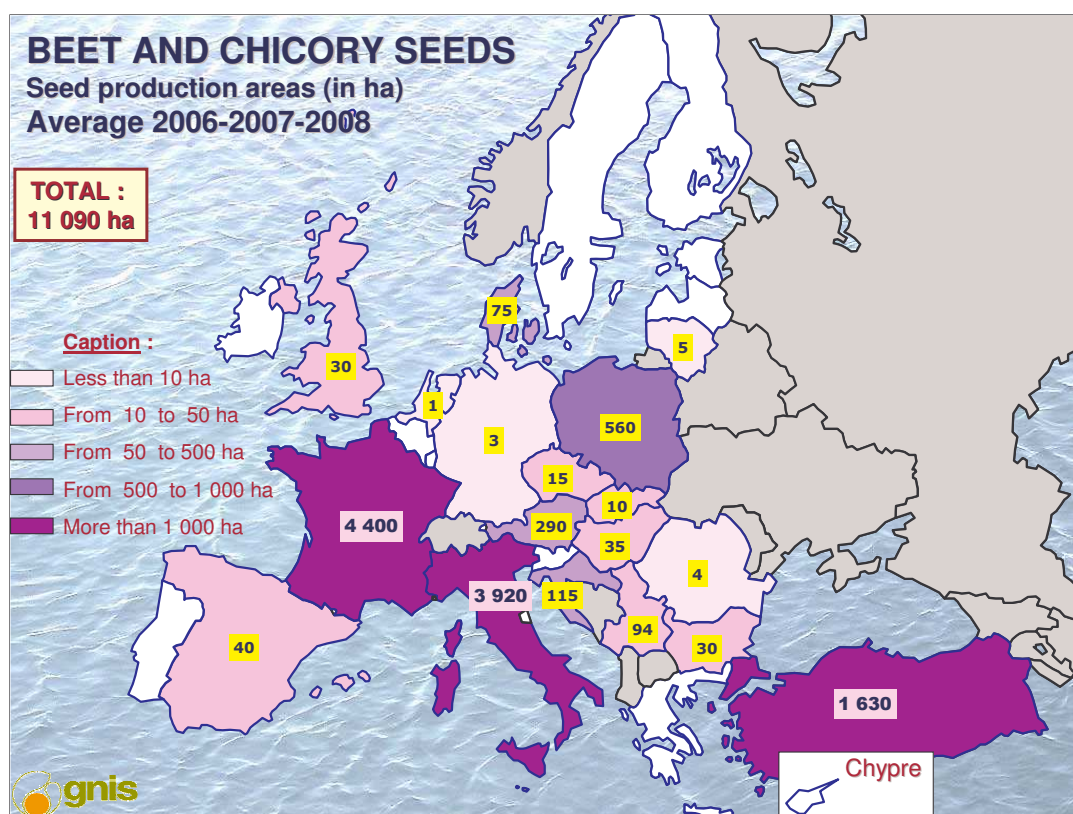


The main sunflower seed producers are the Russian Federation with around 30 000 ha, followed by France (8 000 ha), Romania and Spain (5 000 ha each).



The main European fiber seed producer is France with more than 12 500 ha, followed by Belgium and Netherlands.

The comparison between the periods 2001/2003 and 2006/2008 shows a global decrease in the European fiber seed production area.



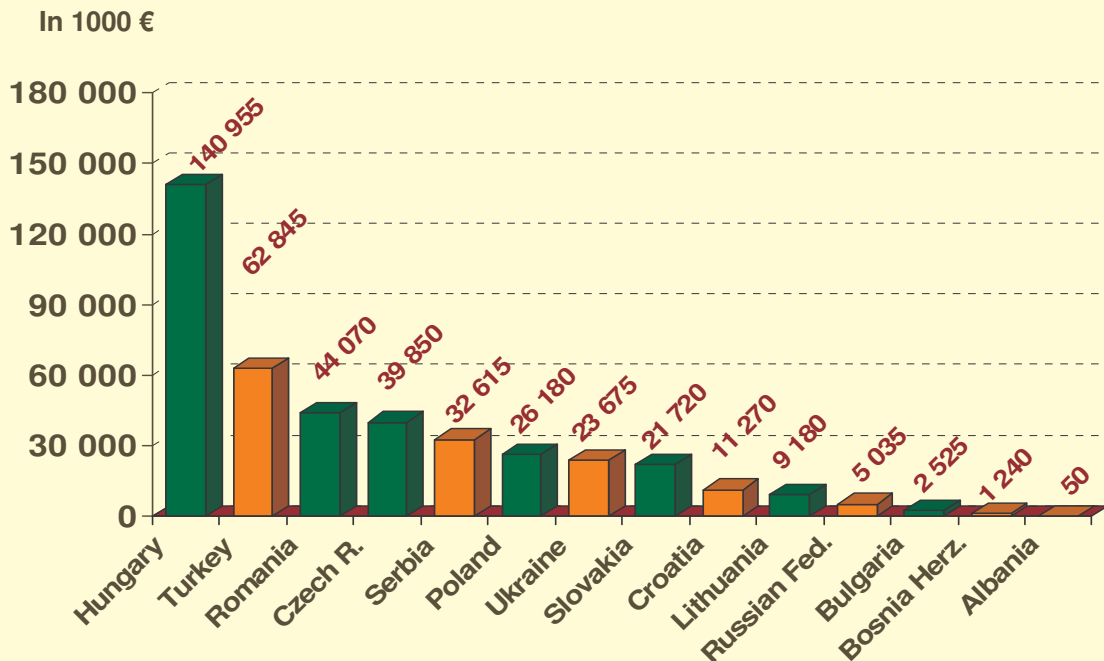
The three main European beet and chicory seed producers are France and Italy with around 4 000 ha each, followed by Turkey.

Trade of E.E.S.N.E.T countries (import / export)

source : Cometrade / Eurostat / USDA - Year 2008

The COMETRADE or customs data do not take into account all the seeds due to the nomenclature. The following tables will present data for maize, vegetable, fodder and beet seeds. They include also some data on oil crops but based on an average price in the countries. The figures have to be taken with reserve!

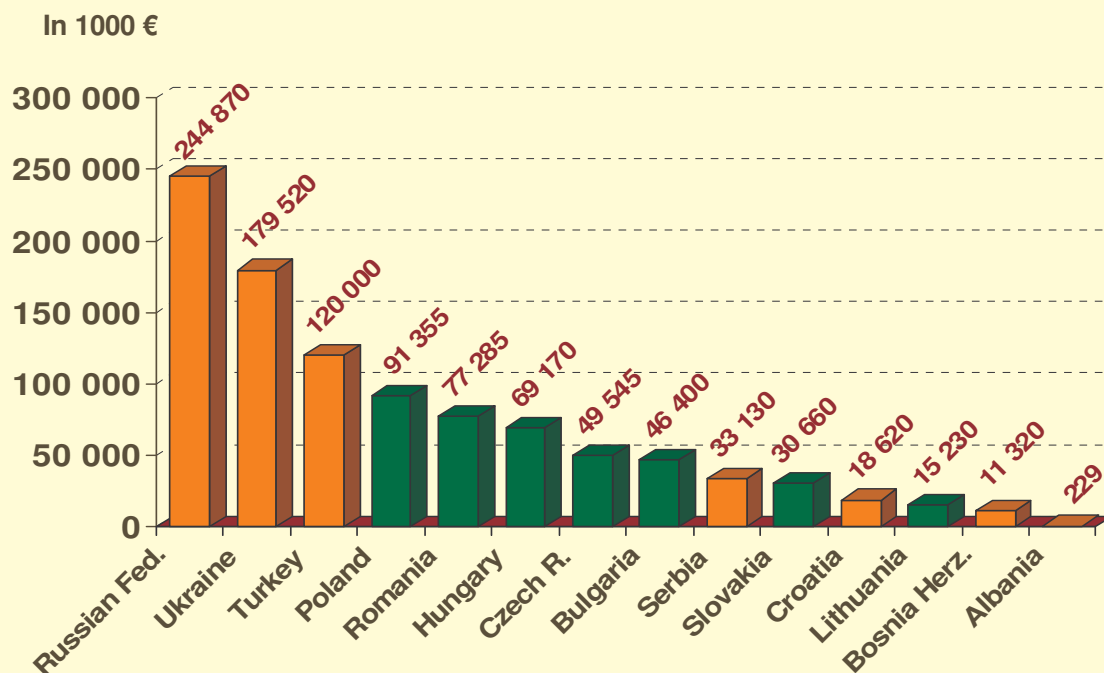
Main exporting countries



Total : maize, oilseed, forage, vegetable, floral, beet seeds

The main exporting countries in EESNET area are: firstly Hungary with 140 millions Euros, followed by Turkey with 62 millions Euros. Then we can find Romania, Czech Republic, Serbia, Poland, Ukraine, Slovakia and Croatia.

Main importing countries

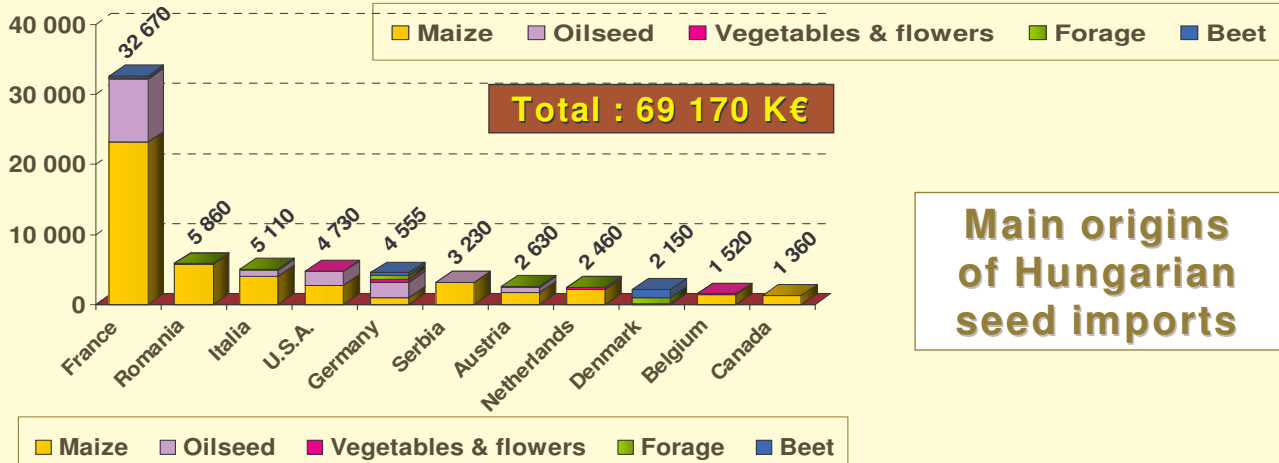
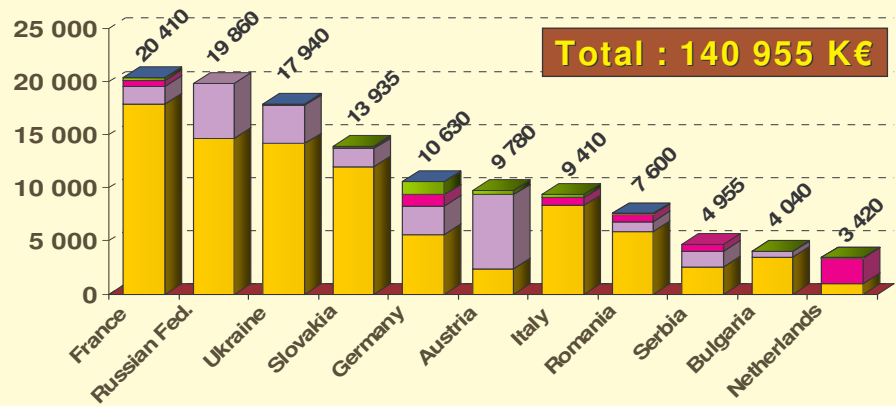


Total : maize, oilseed, forage, vegetable, floral, beet seeds

The main importing country in EESNET are the Russian Federation with more than 240 millions Euros, followed by Ukraine (179 millions) and Turkey (120 millions).

Then we can find Poland, Romania, Hungary, Czech republic, Bulgaria.

Main destination of Hungarian seed exports



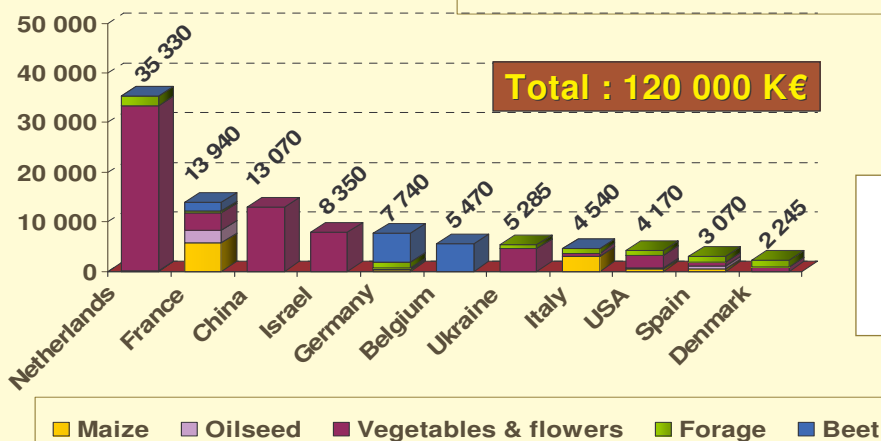
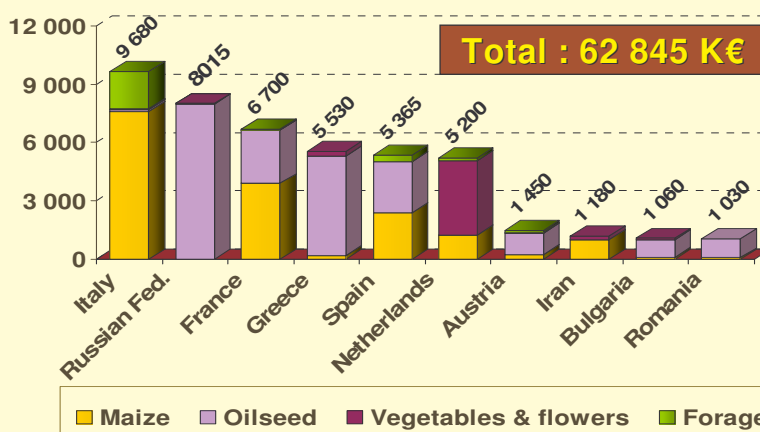
Main origins of Hungarian seed imports

The trade balance of Hungary is positive and represents 70 millions Euros.

Mainly maize seed exporter, Hungary is the main concurrent to France on the European maize seed market.

The main origin of Hungarian seed imports for maize and oil seeds is France.

Main destination of Turkish seed exports



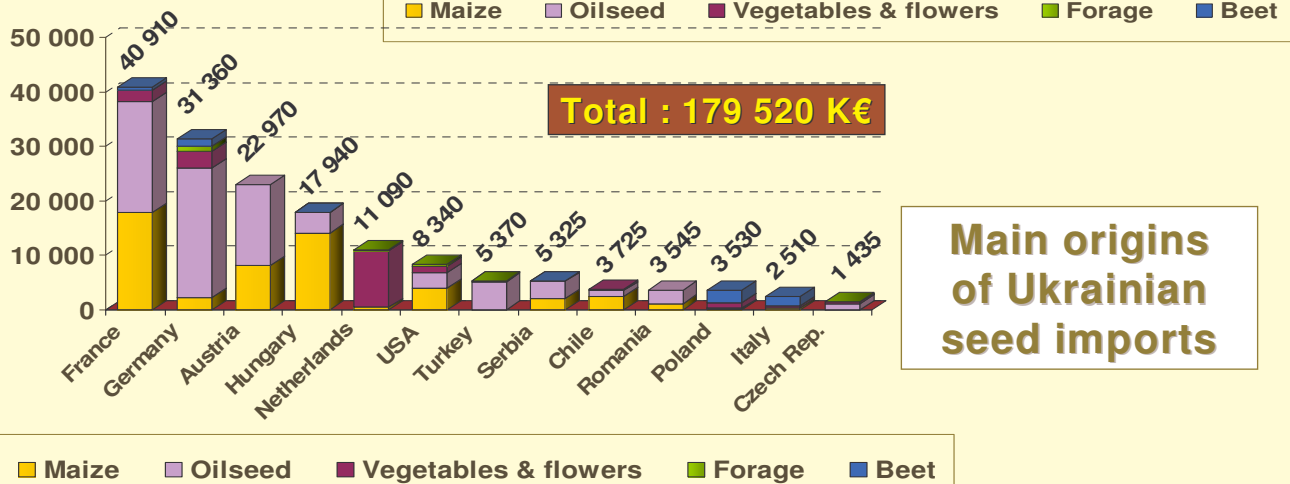
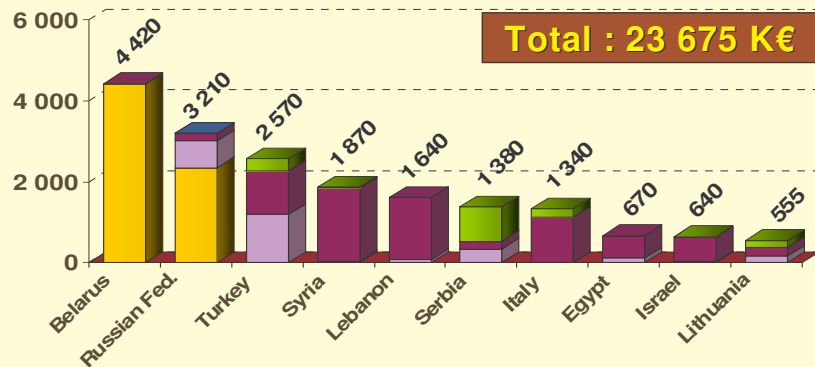
Main origins of Turkish seed imports

Turkey is a big European seed exporters for oil seed, in particular sunflower and poppy, and maize.

The main origins of Turkish seed imports is Netherlands with vegetable and flower seeds.

The trade balance of Turkish seed market is negative and represents 60 millions Euros.

Main destination of Ukrainian seed exports



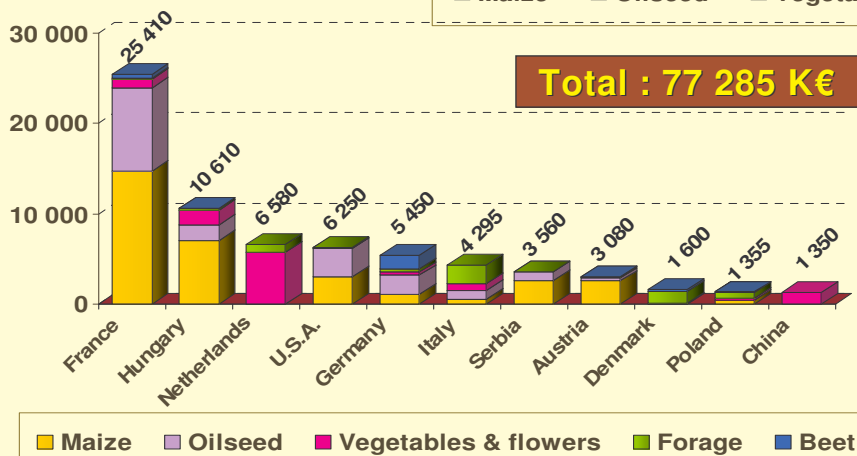
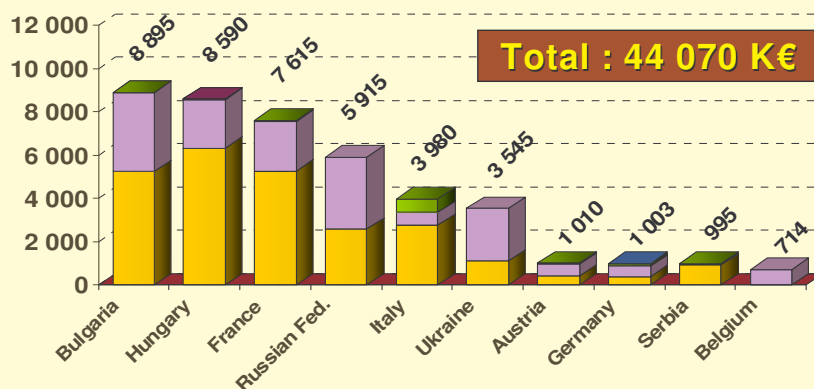
Main origins of Ukrainian seed imports

Ukraine is a big seed importers for maize and oil seeds, from France, Germany, Austria, Hungary.

The main destinations of Ukrainian seed exports are Belarus, Russian federation, Turkey, Syria, Lebanon ...

The trade balance of Ukraine is negative and the value could be estimated around 120 millions Euros.

Main destination of Romanian seed exports

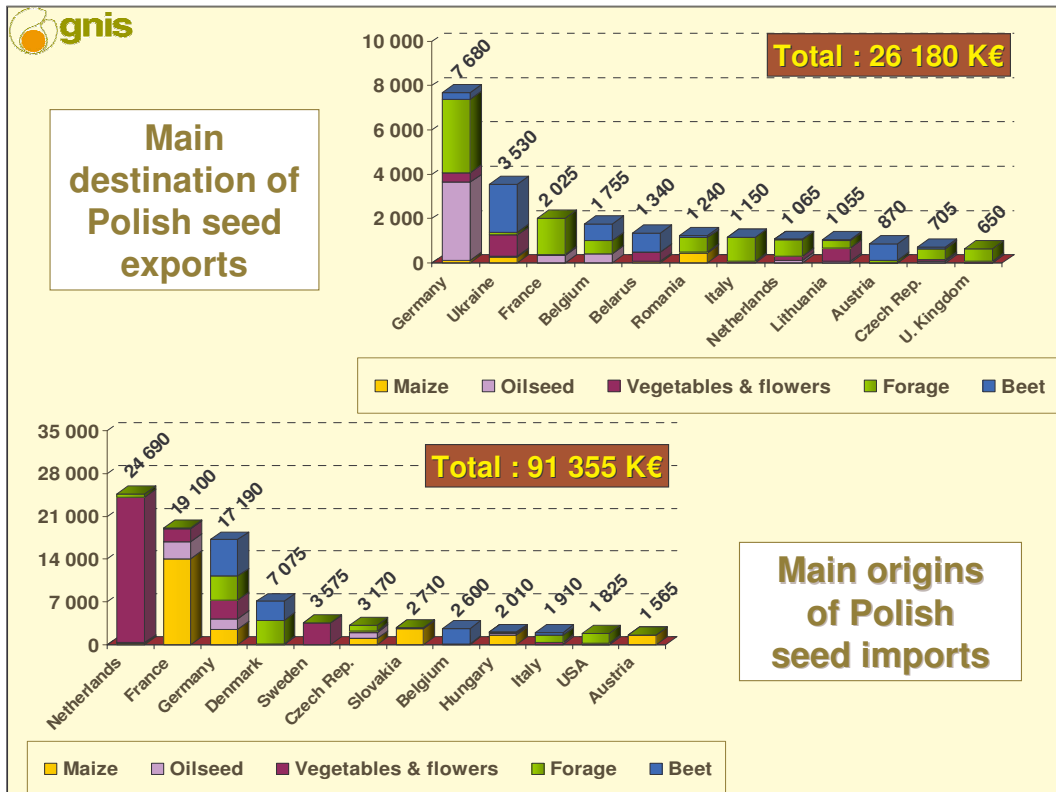


Main origins of Romanian seed imports

The trade balance of Romania is negative and is estimated around 33 millions Euros.

The main destinations of Romania seed exports are Bulgaria, Hungary, France and the Russian Federation, essentially for maize and oils seeds.

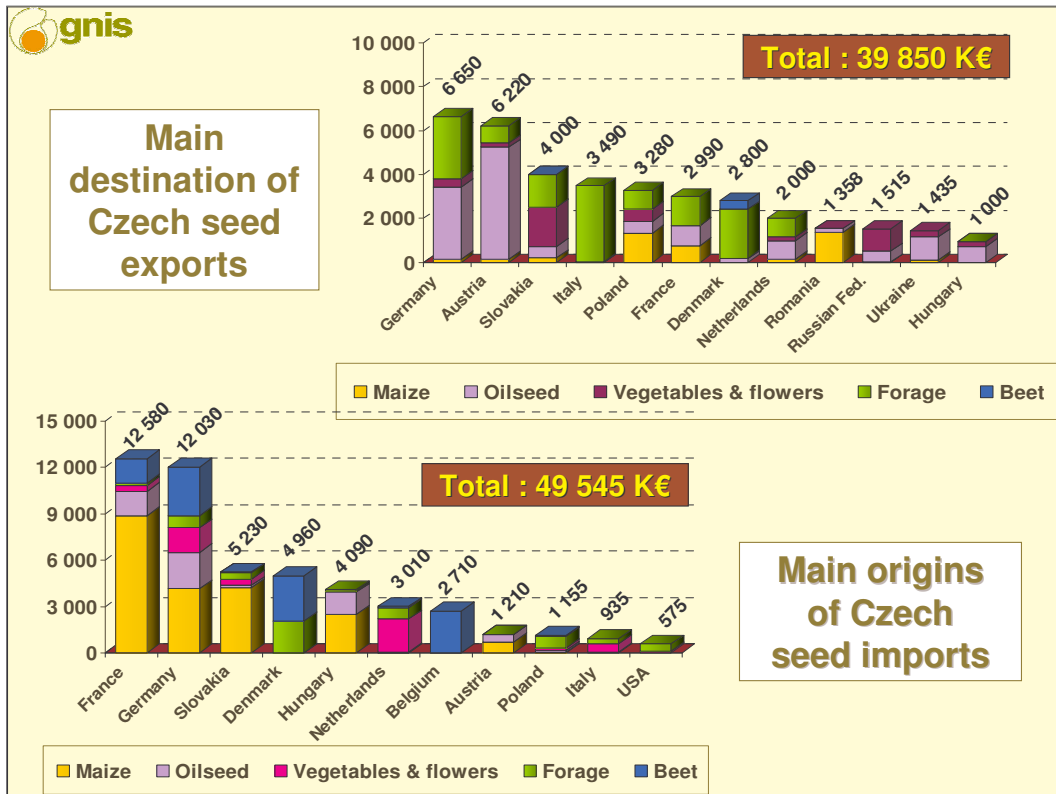
The main origin of Romanian seed imports is France, with maize and oils seeds.



The trade balance of Poland is negative and represents around 50 millions Euros.

Poland exports mainly to Germany (forage and oils seeds) and to Ukraine (beet seeds).

The main origins of Polish seed imports are Netherlands (vegetable and flower seeds)? France (maize seeds) and Germany.

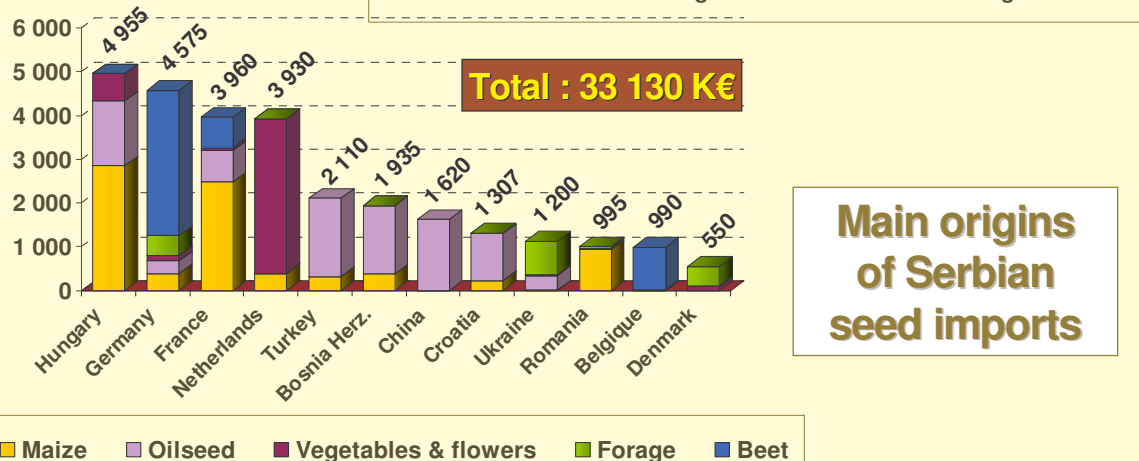
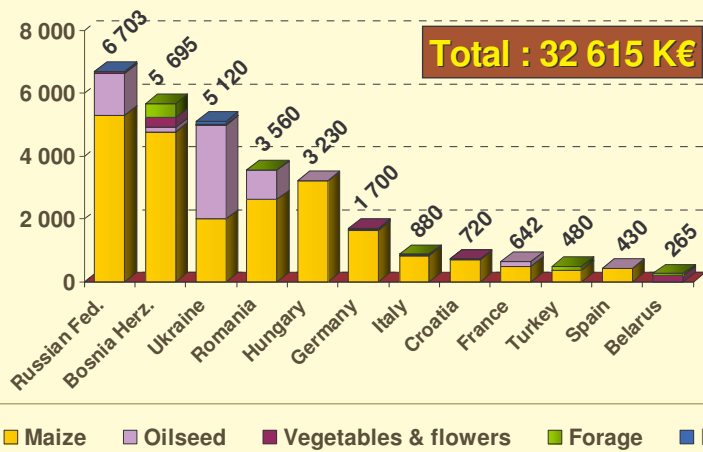


Czech republic is a major European seed exporter for fodder seeds and oil seeds.

The main origins of Czech seed imports are France (maize) and Germany.

The trade balance of Czech republic is negative around 10 millions Euros.

Main destination of Serbian seed exports

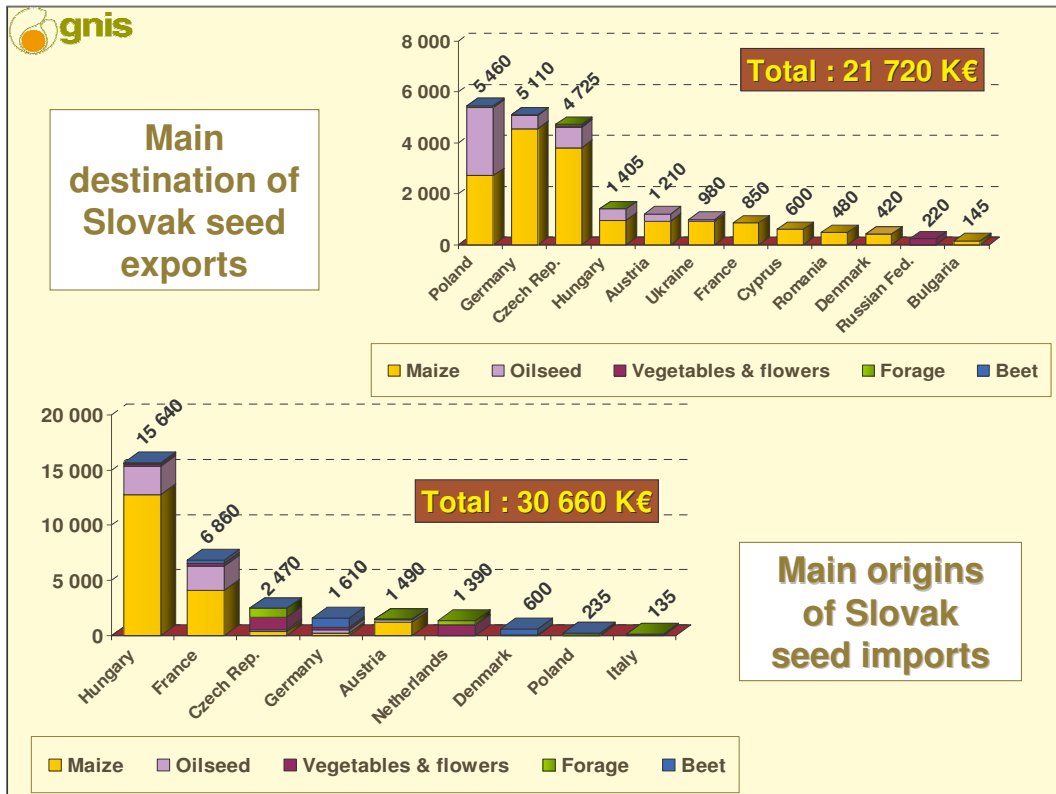


Main origins of Serbian seed imports

Serbia is a seed exporter for maize seeds to the Russian Federation, Bosnia, Ukraine, Romania, Hungary.

The main origins of Serbian seed imports are Hungary, Germany (beet seeds), France and Netherlands (vegetable and flower seeds).

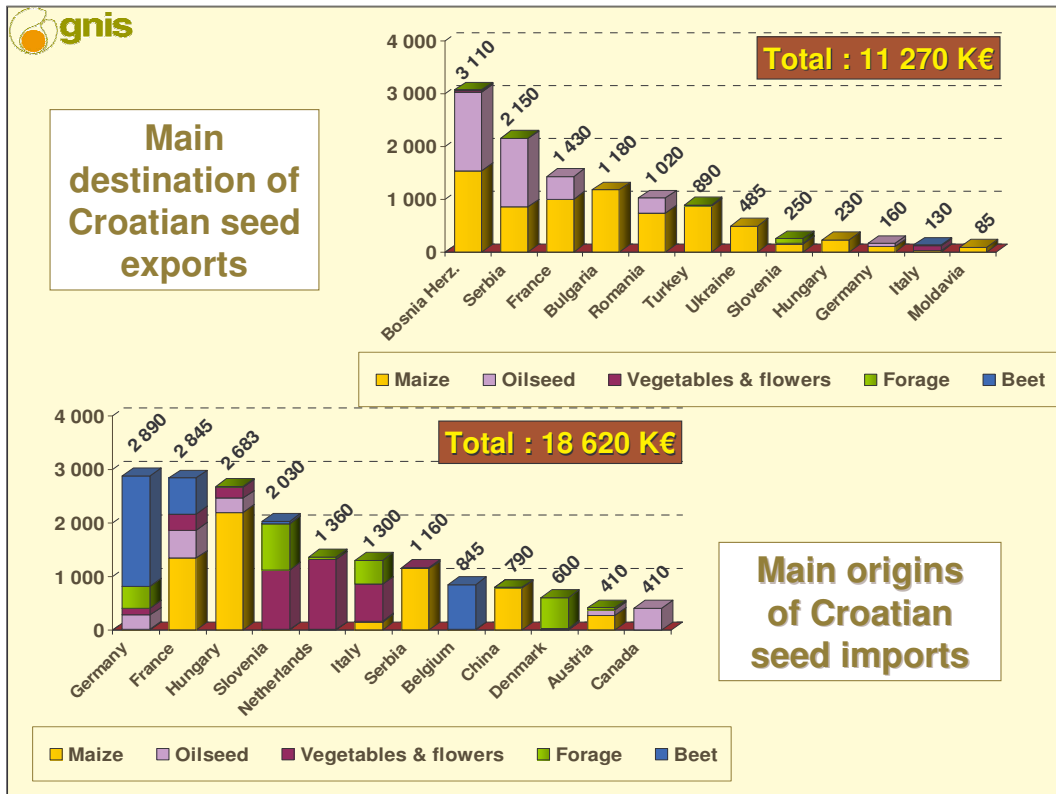
The trade balance of Serbia is globally equilibrate between imports and exports.



Slovakia is a seed exporter for maize seeds. The destinations are Poland, Germany and Czech republic

The main origin of Slovak seed imports is Hungary, then France.

The trade balance of Slovakia is negative: the value is less than 9 millions Euros.

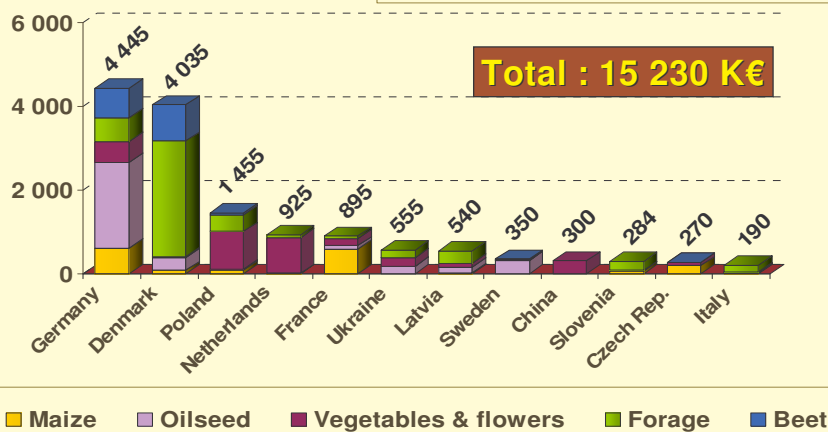
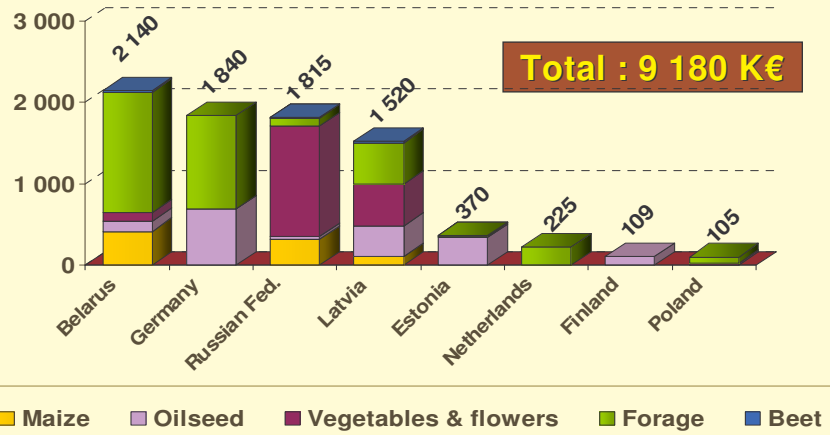


Croatia is a seed exporter for oil and maize seeds.

The main origins of Croatian seed imports are Germany (beet seeds) France, Hungary.

The trade balance of Croatia is negative with a value around 7 millions Euros.

Main destination of Lithuanian seed exports

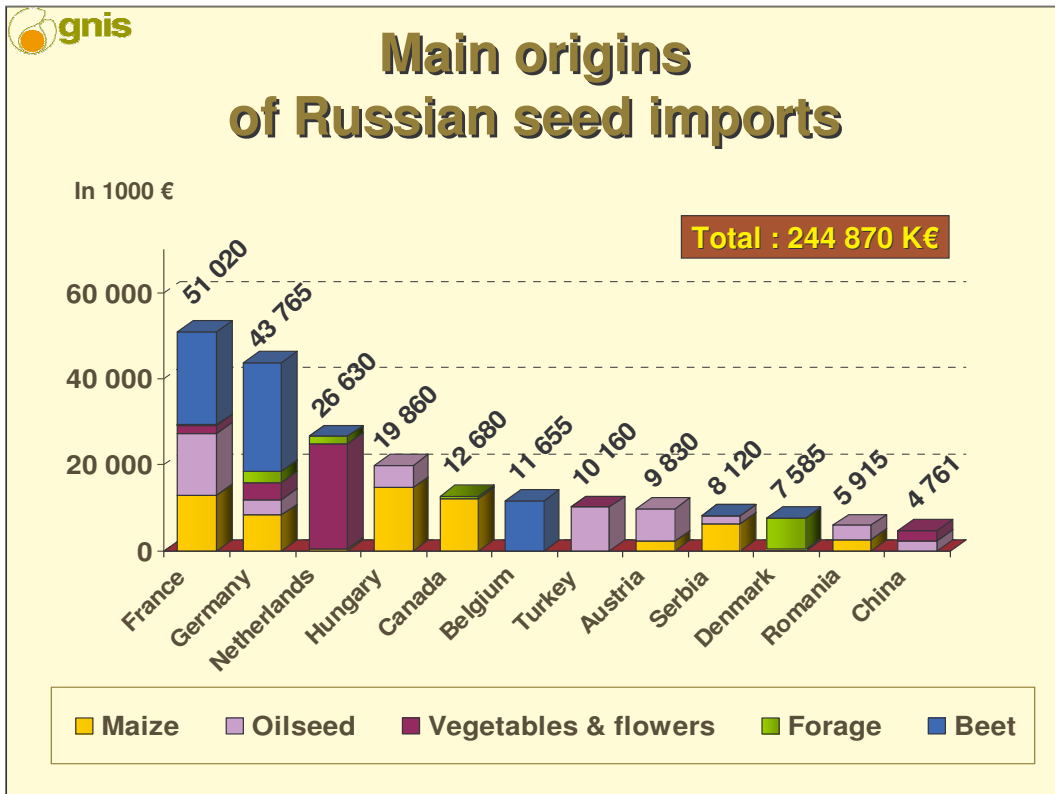


Main origins of Lithuanian seed imports

The trade balance of Lithuania is negative (8 millions Euros).

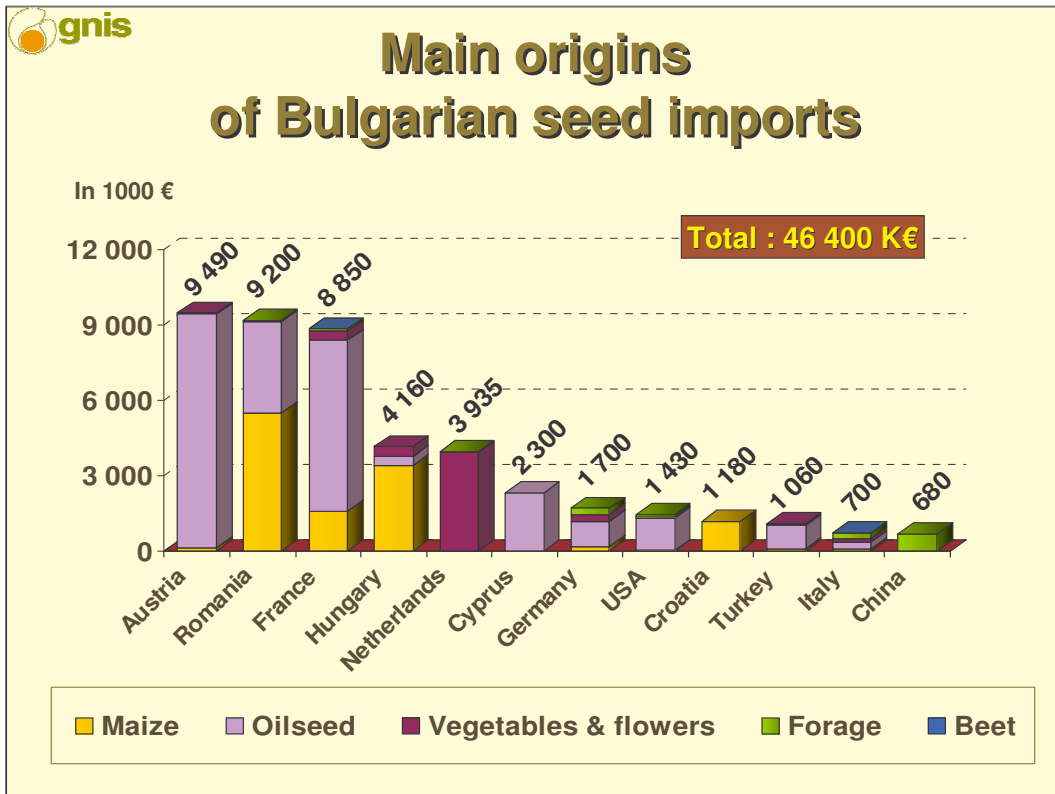
Lithuania exports fodder seeds to Belarus and Germany and vegetable seeds to the Russian federation.

The main origins of Lithuania seed imports is Germany and Denmark (fodder seeds).

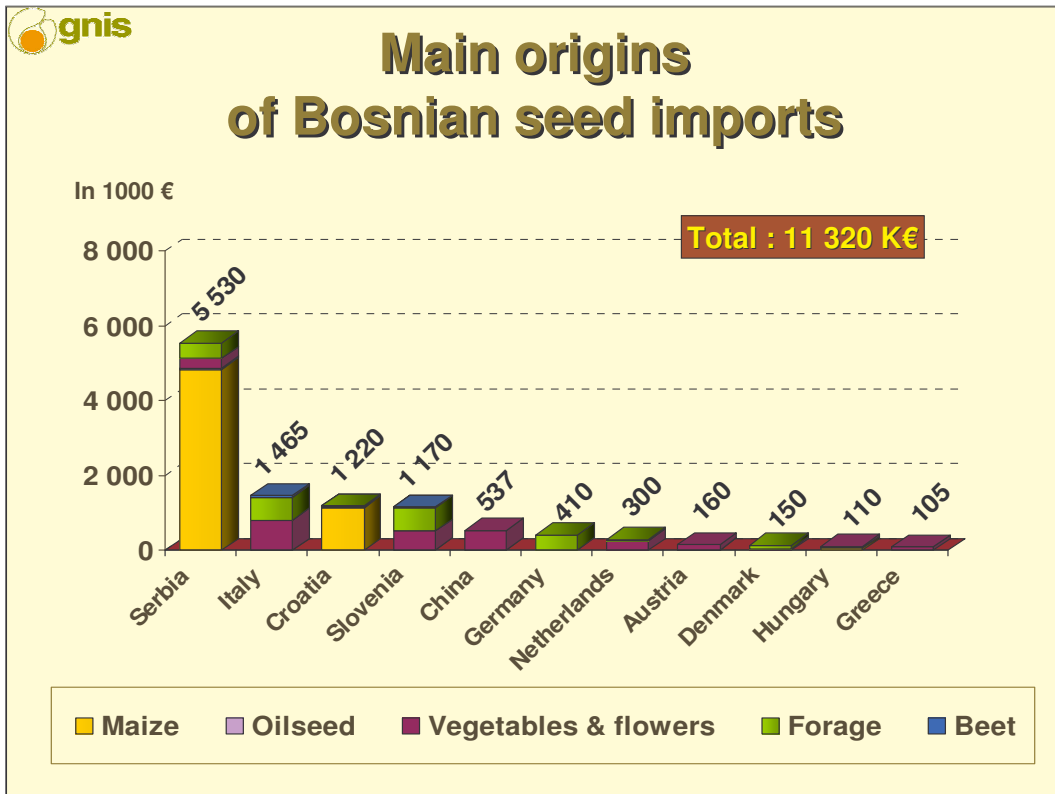


Russian is a big seed importer; the value represents more than 244 Millions Euros.

Russian imports from France (beet, maize, oil seeds), Germany (beet and maize seeds), followed by Netherlands (vegetable seeds), Hungary.

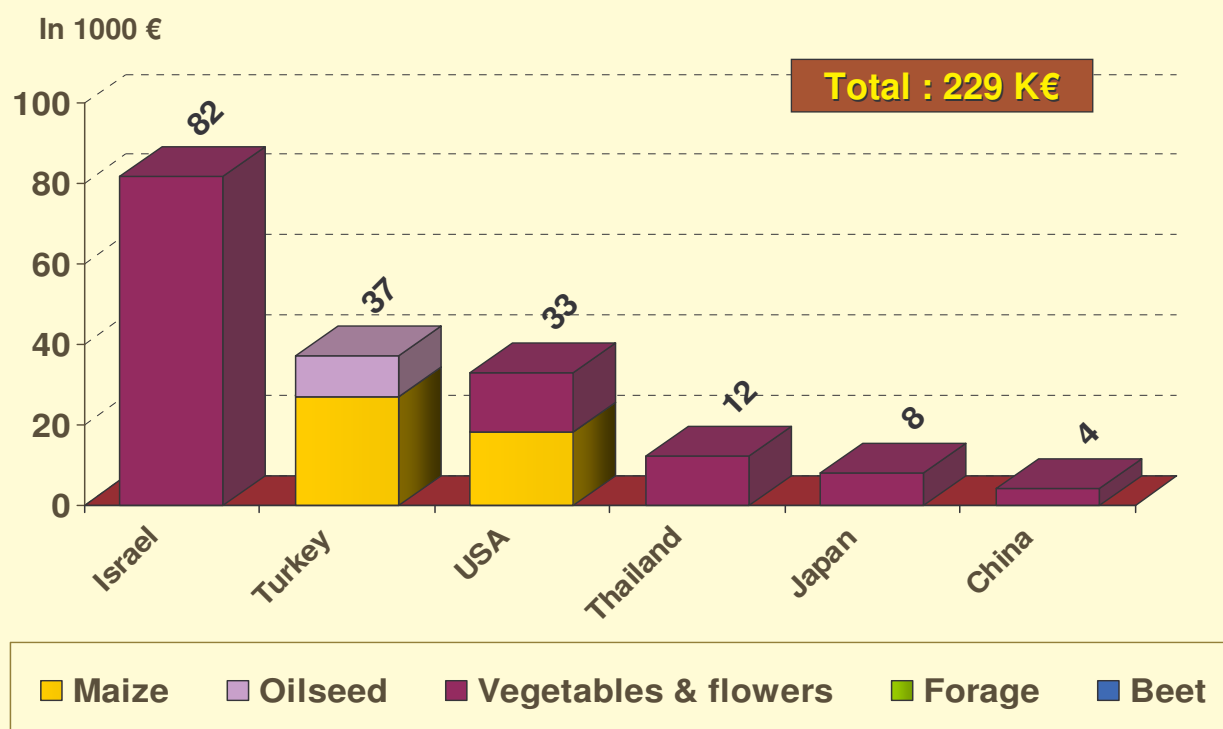


Bulgaria is a seed importer for oils seeds and maize. The main origins of the imports are Austria, Romania and France.



Bosnia imports essentially maize seeds from Serbia.

Main origins of Albanian seed imports



Albania is a small seed importer for vegetable seeds; the vegetable seed origins are non European countries: Israel, USA, Thailand, Japan and China.

