



Forage Seed Production in France

M. Claude TABEL – IHSB Congress / June 2023



SEMAE : French Interprofessional Organisation for Seeds and Plants

An interprofessional organisation dedicated to the common benefit

Created in 1962

Legal frame: article 157 of the OCM (Organisation Commune des Marchés) regulation

Financed collectively through a specific scheme (CVRO : Voluntary and mandatory contributions)

Nearly 200 people, spread all over France, constitute the vital forces of SEMAE

One important specificity: Semae host the national competent authority for seed production and quality control including certification



Scope of Semaie actions:



Knowledge of production and markets: **Production of statistics**



Stricter production rules than those laid down in EU or national regulations



Elaboration of standard contracts compatible with the regulation of the Union; Realization of the standard agreement and its 9 appendices by group of species in coherence with the regulatory evolutions (Law Egalim), realization of economic indicators.



Actions in favor of Biodiversity: TIRPAA funding and Endowment Fund for the preservation of the biodiversity of cultivated species (creation April 2021)



Actions of **promotion and development of the seed production in France** and at the international level



Measures to protect organic farming and appellations of origin, quality labels and geographical indications; Analysis of the evolution of organic markets, provision of information to operators to better understand the needs (quantities and qualities) of organic seeds.



Studies to improve the quality of products: Financing of **technical studies for the production of seeds**.



Research of cultivation methods allowing the limitation of the use of phytosanitary products and assuring the preservation of soils and the preservation or the improvement of the environment



Use of certified seeds and quality control of the products; **Official control SOC**, reference plan quality Dust...



Some examples of interprofessional actions at SEMAE

Support for the maintenance of public domain varieties

Species: old vegetables
Type of action: Create a support fund



Interprofessional agreement on farm seed potatoes

Species: potato
Type of action: Establish an interprofessional agreement



Protected areas of production

Species: Beetroot
Type of action: Develop protected areas



Promote organic seed production

Species: All seeds
Type of action: Development of the national organic seed database



Interprofessional quality standards

Species: chickpea
Type of action: Strengthen quality control



Gardener behavior survey following COVID

Species: all seeds
Type of action: Behavioral survey in 2021 of amateur gardeners



Increase awareness of forage varieties

Species: Fodder crop
Type of action: Creation of a website



Nine specialized sections

SEMAE has nine specialised sections that represent the major species groups in the seed and plant sector. These sections promote exchanges among sector stakeholders as well as between stakeholders and government representatives.

They are the driving force behind collective actions that benefit the sector.



small-grain cereals



forage & turf plants



beets & root chicory



oilseeds



maize & sorghum



vegetables & ornamentals



potatoes



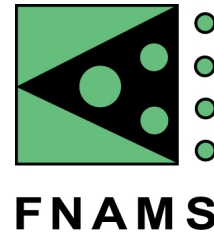
flax & hem



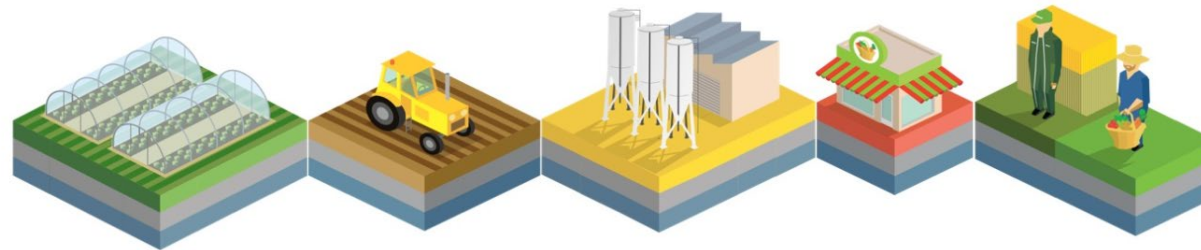
Diversity of seeds

Large representation

238 elected Professionals members of 48 professional federations members of SEMAE



representing 5 main activities of the sector :

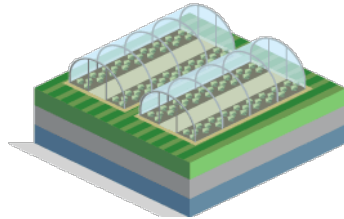


9 specialised sections, 5 commissions, and many working groups

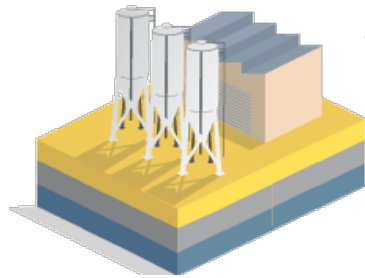


Industry players and stakeholders representation - 2022

69
Breeding companies



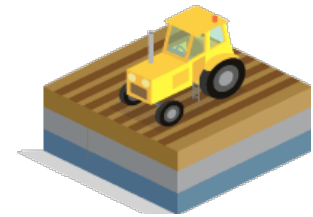
240
Seed production companies



6 000
Distribution companies

Contract

18 600
Seed growers



326 000
Farmer seed users



16,5 millions
Individual seed users



BOARD

The board is made up of the presidents and vice-presidents of SEMAE's nine specialized sections. It also includes 5 members from the farmers unions.

Terms last three years and members can be re-elected.

In the interests of representation, the seed-growers sector must assume the presidency or vice-presidency of the Sections.

The board has the following responsibilities:

- to define SEMAE's strategic goals
- to coordinate work within and among Sections
- to establish and approve the budget



François DESPREZ
SEMAE chairman



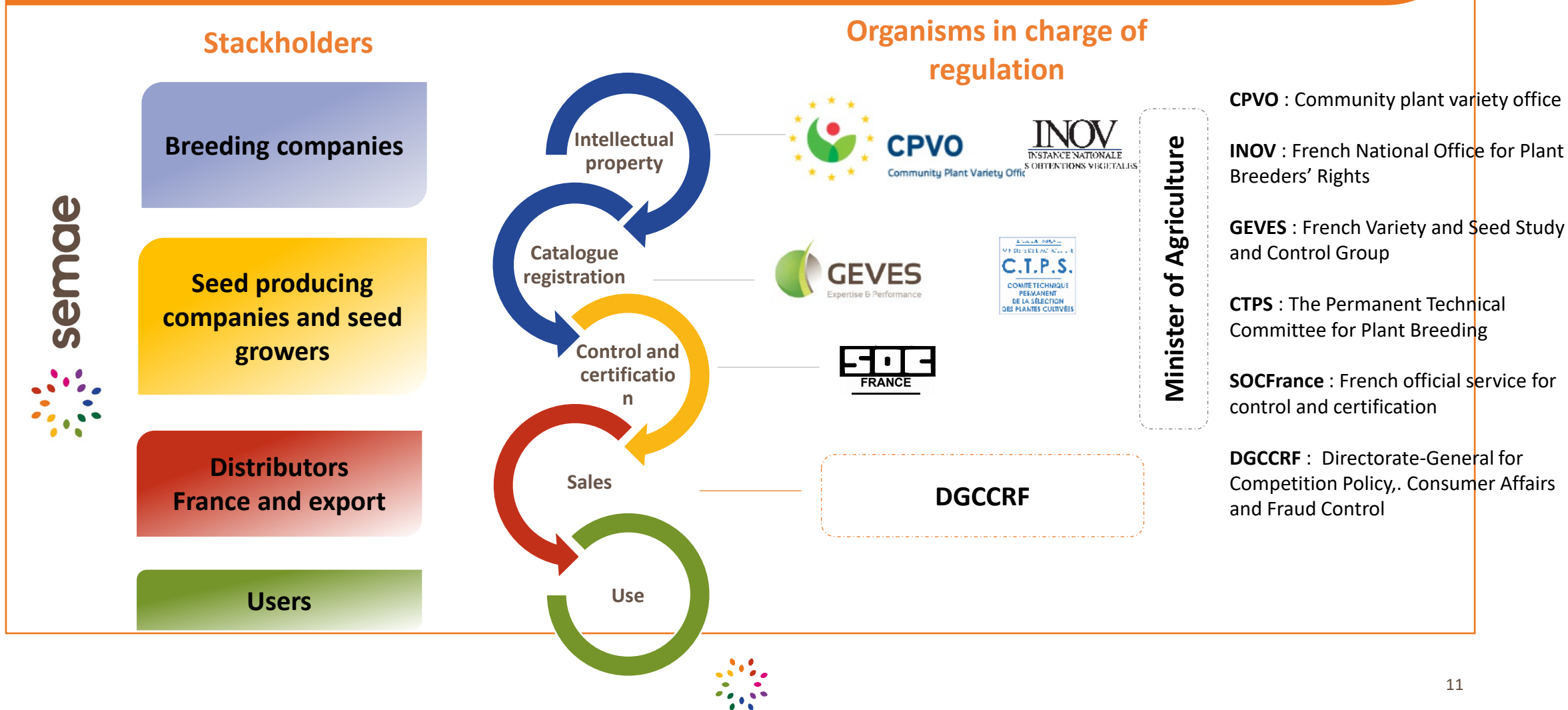
Pierre PAGÈS
SEMAE Vice-chairman





Seed certification and regulation

Organisation of French seed sector



The Quality and Official Control Department

Dedicated technical department, responsible for the public service missions entrusted to SEMAE, headed by a civil servant appointed by the Ministry of Agriculture who is the guarantor of the independence of decisions:

- in charge of the control and certification of seeds and seedlings
- in charge of control and authorization to issue plant passports for seeds and seedlings (phytosanitary requirements for movements of plant material within the European union)
- Delegated body for controls for the implementation of international phytosanitary legislation for seeds and seedlings (phytosanitary certificate)

National Designated Authority towards:



Activities to support continuous quality improvement:

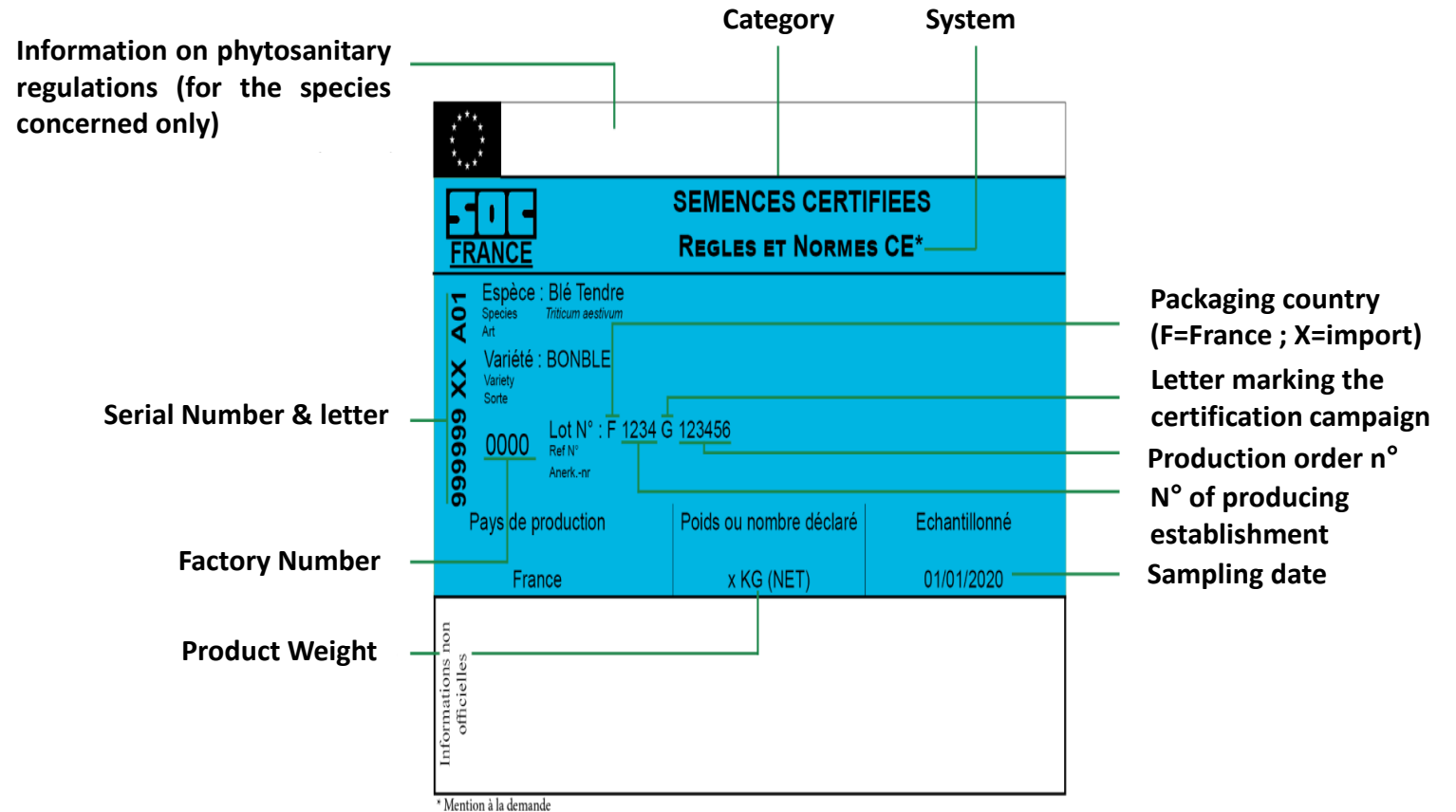
- Implementation of Scheme « Good Seed and Plant Practices » (GSPP)
- Implementation of Scheme « Végétal local »



Specificities of certified Seeds

Certified seed:

The official label and the phytosanitary passport (for species that are subject to it) present on each bag guarantee that the seeds purchased have been controlled and tested to ensure compliance with sanitary and quality standards.





French seeds sector vs. international trade and production

French seed production for all species

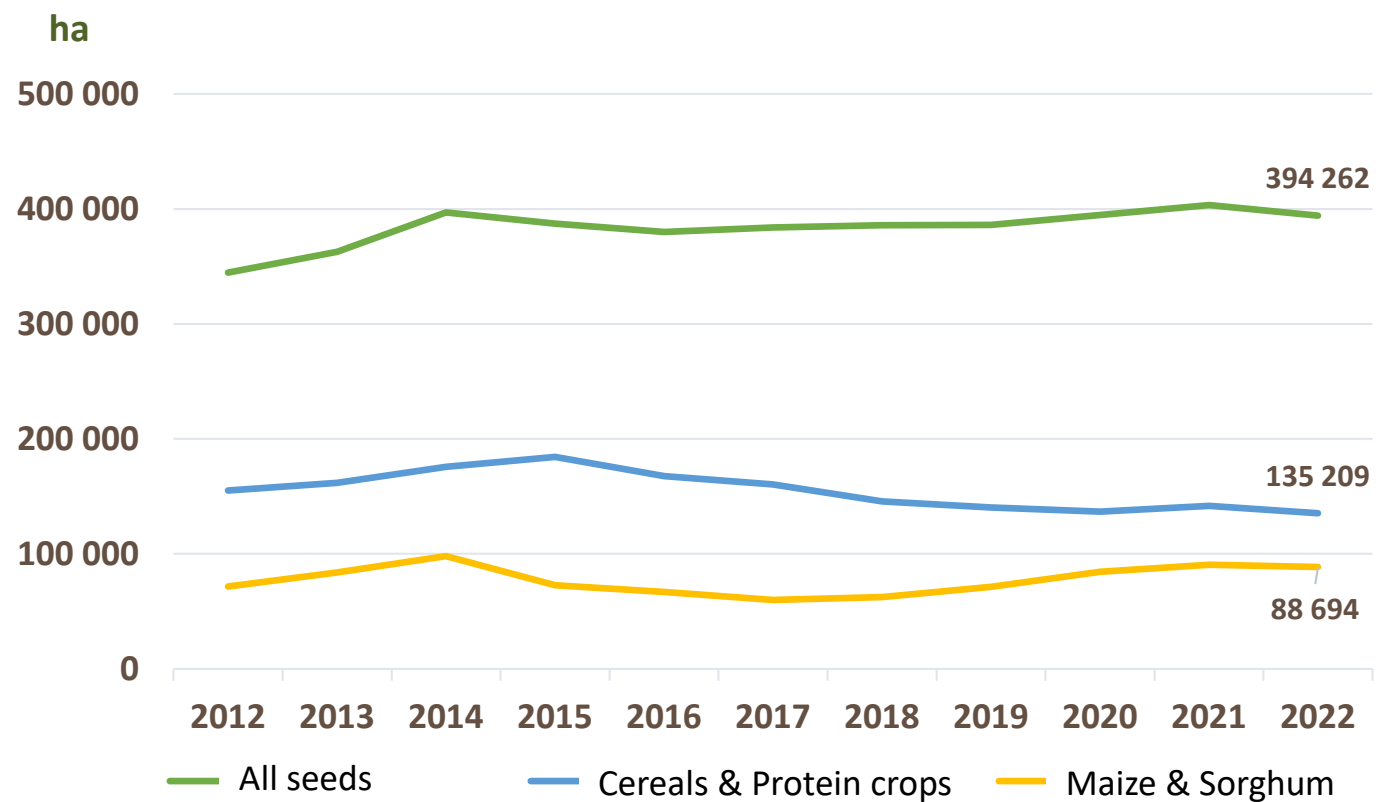
Main countries	Area under seed production excluding vegetables (ha) - 2021
FRANCE	377 790
ITALY	205 450
GERMANY	195 030
SPAIN	182 790
POLAND	172 740
DENMARK	164 215

**Total surface in EU (2021):
2 101 605 ha (+0,6%)**

**France is the first producer in
the EU
=> 18 % of the European area**



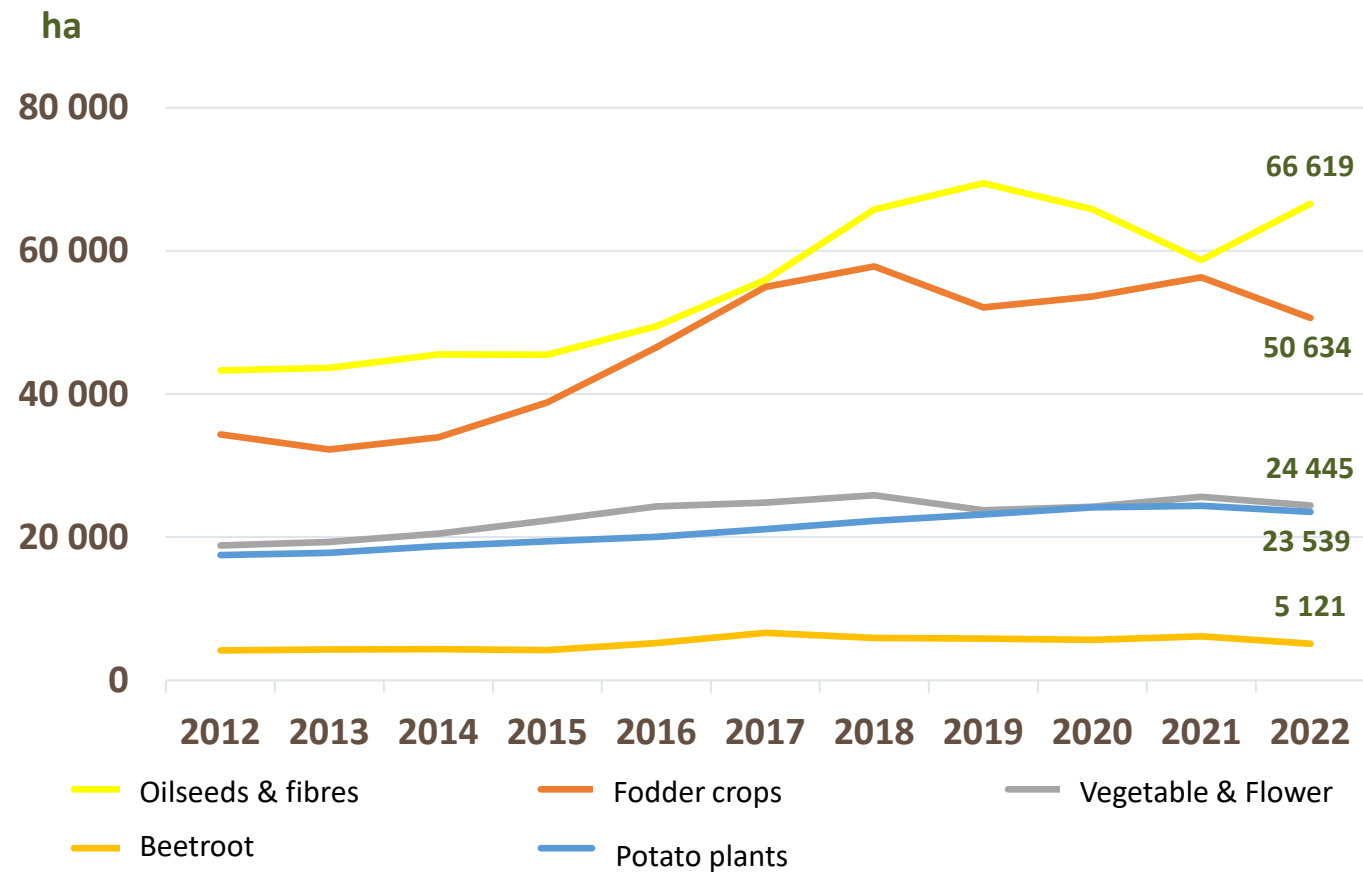
France - Seed production area



Source SEMAE 2022



France - Seed production area



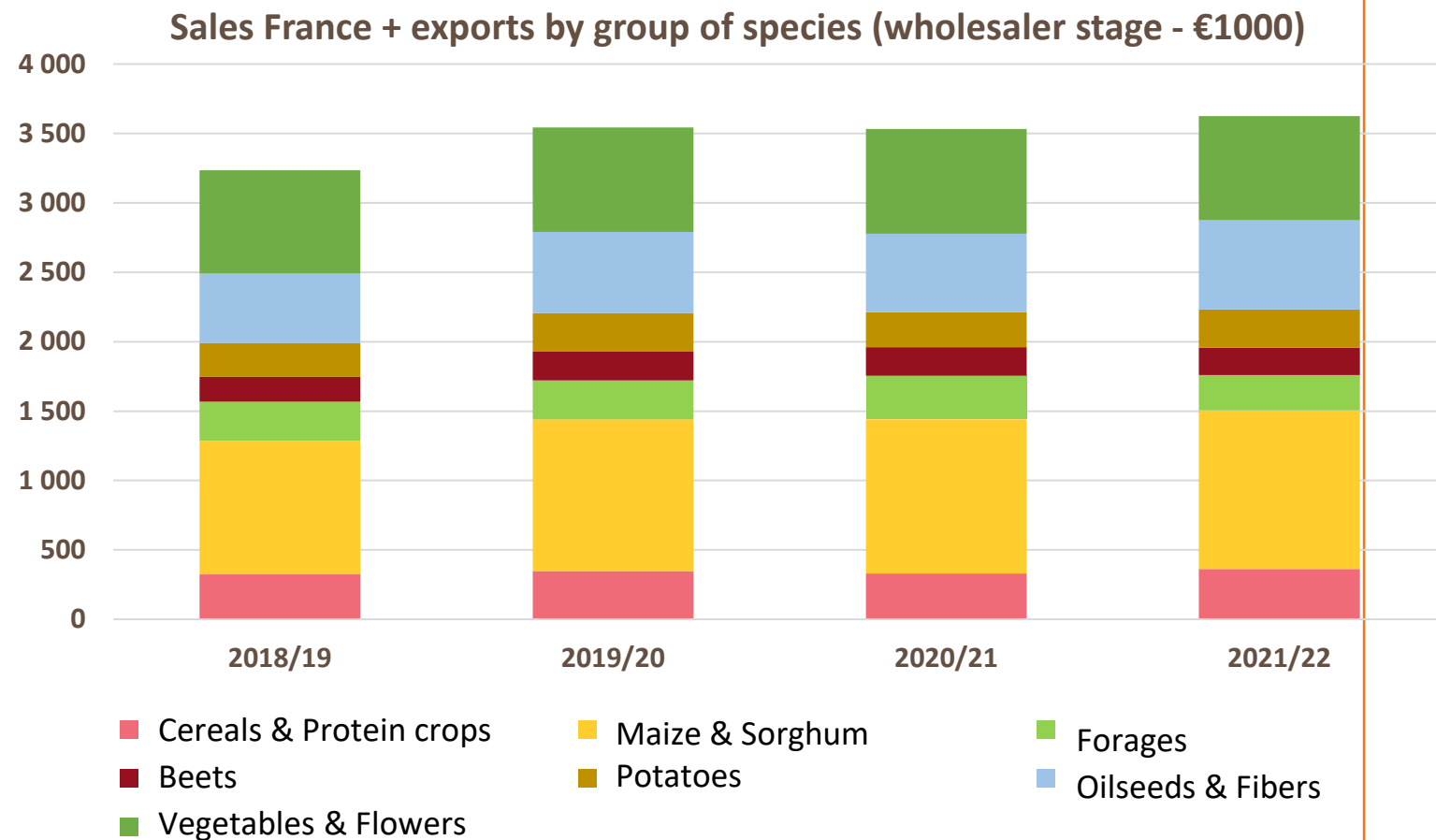
Source SEMAE 2022



France - Breakdown of sales

Sales in the seeds sector are €3.6 billion (2021/2022 wholesaler stage).

By way of comparison, the value of agricultural production (plant products) will be €49.5 billion in 2021 (source: INSEE).



* Source SEMAE d'après Eurostat - USDA - les statistiques du commerce extérieur de la DGDDI pour la France

Top 5 exporting countries - 2021

Main countries	Exportations* (Mio € année civile)		
	2019	2020	2021
France	1 203	1376	1353
USA	936	831	892
Germany	583	642	741
Netherlands	745	705	655
Denmark	296	350	392

1st in maize
1st in oilseeds
2nd in vegetables

2nd in potatoes
3rd for cereals
3rd for beetroot

3rd for fiber flax

* Source SEMAE d'après Eurostat - USDA - les statistiques du commerce extérieur de la DGDDI pour la France



France - An export-oriented sector (2021-2022)

Species group	Sales figures (M€)	Exports (M€)	% Exports
Cereals and protein crops	362	20	6%
Corn and sorghum	1 144	727	64%
Fodder crops & turf	254	38	15%
Beets	196	95	49%
Potato	277	126	46%
Oilseeds & fibres	641	424	66%
Vegetables & flowers	750	523	70%
Total	3 631	1 962	54%



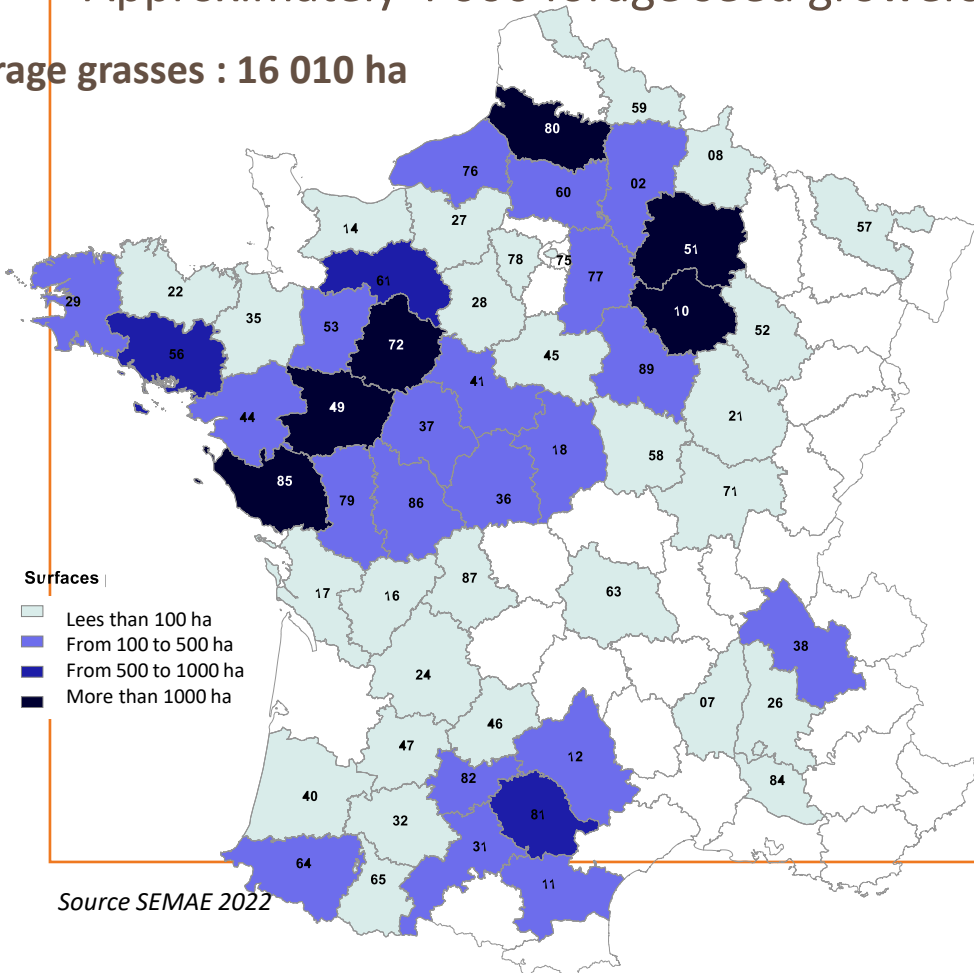


Focus on forage seeds

Farmer seed growers

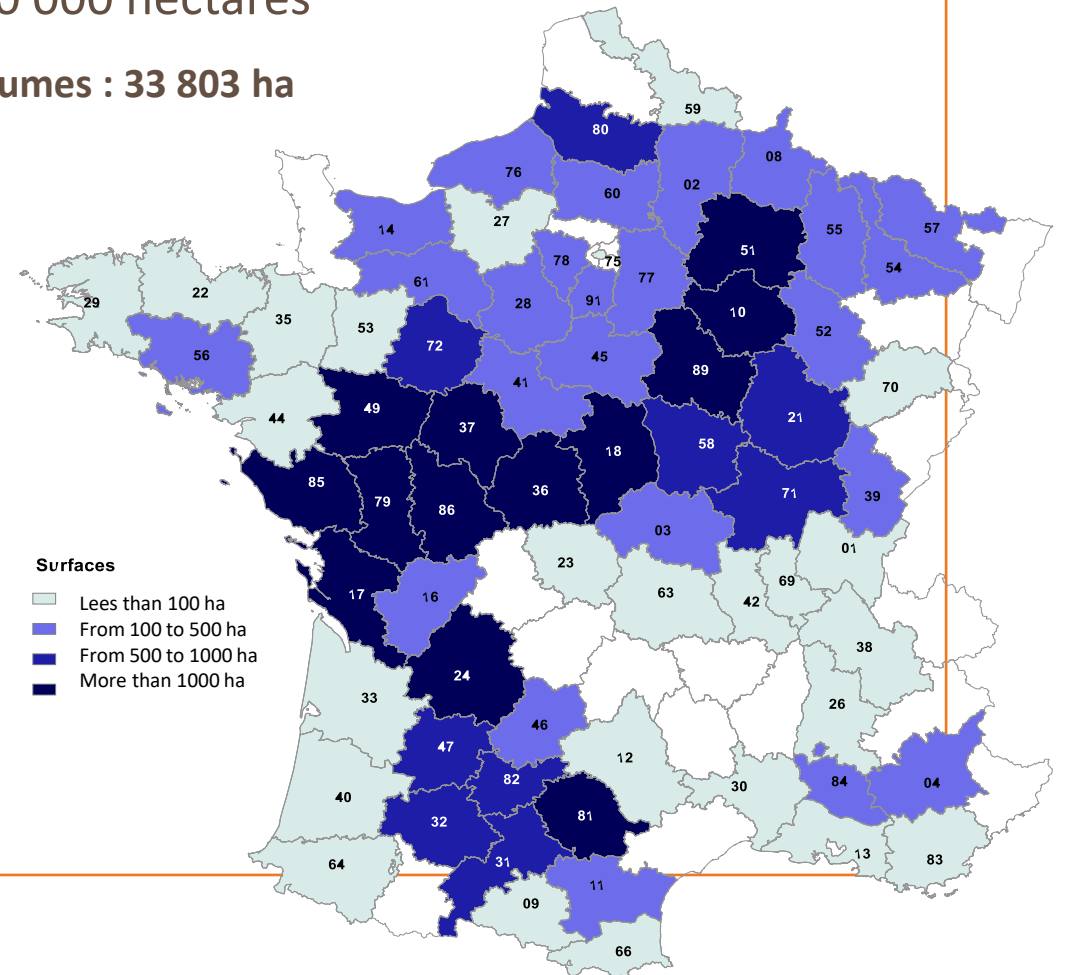
Approximately 4 000 forage seed growers, spread over 50 000 hectares

Forage grasses : 16 010 ha

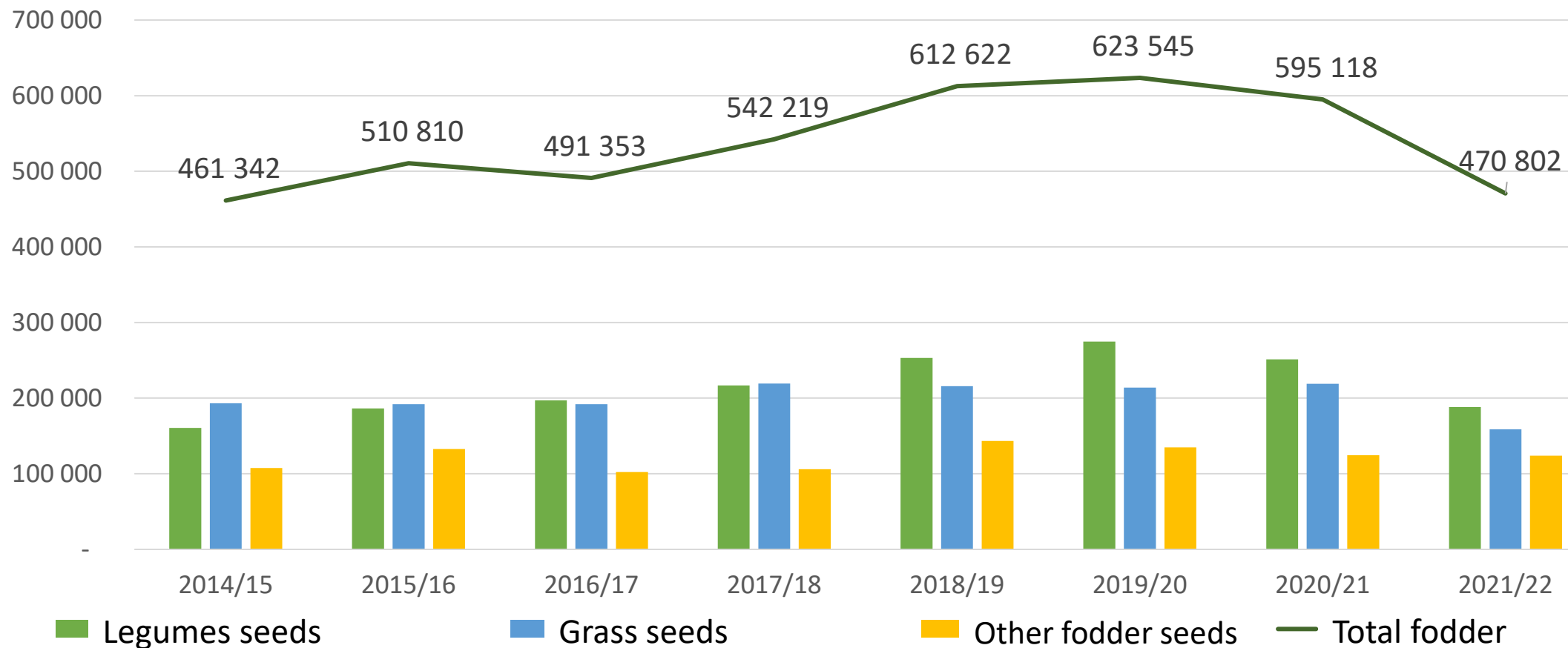


Source SEMAE 2022

Forage legumes : 33 803 ha



Sales of fodder seeds in France (qtx)

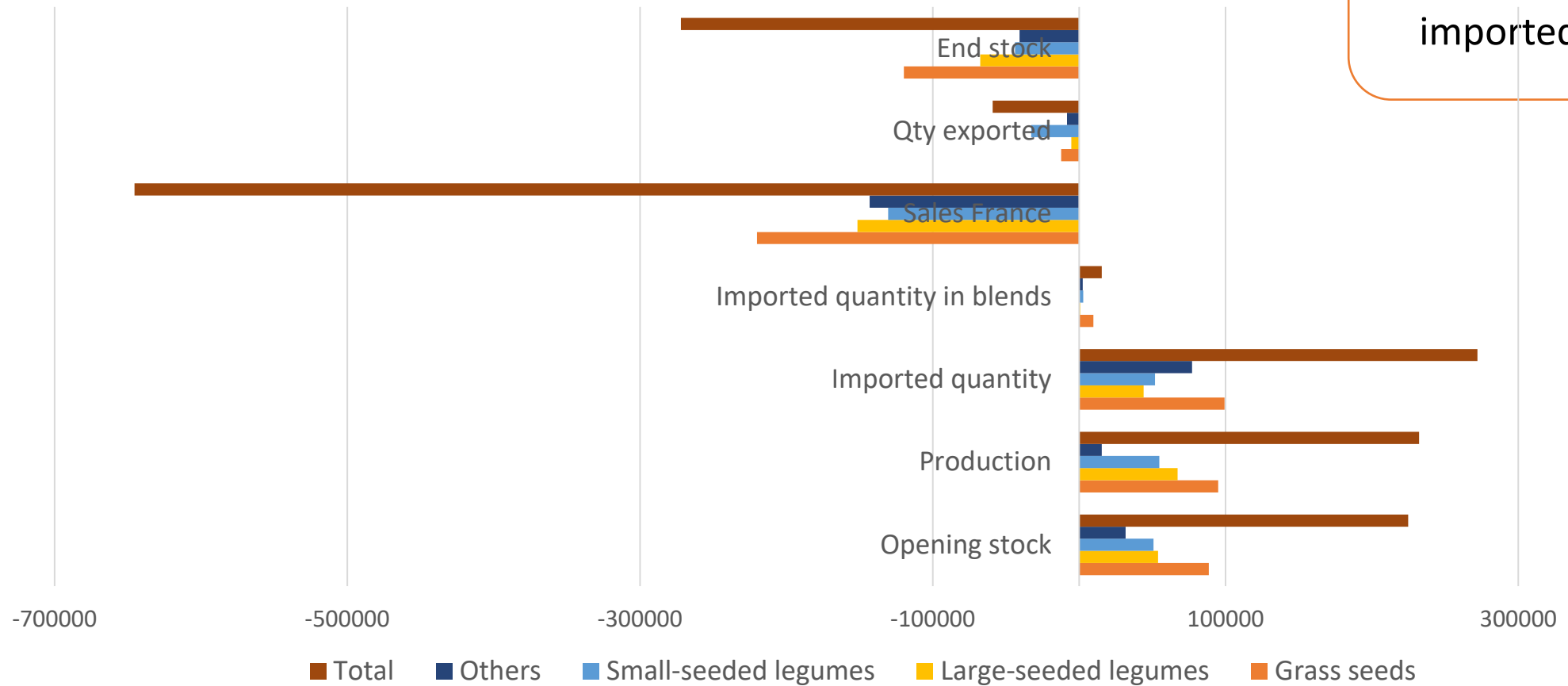


Source SEMAE 2022

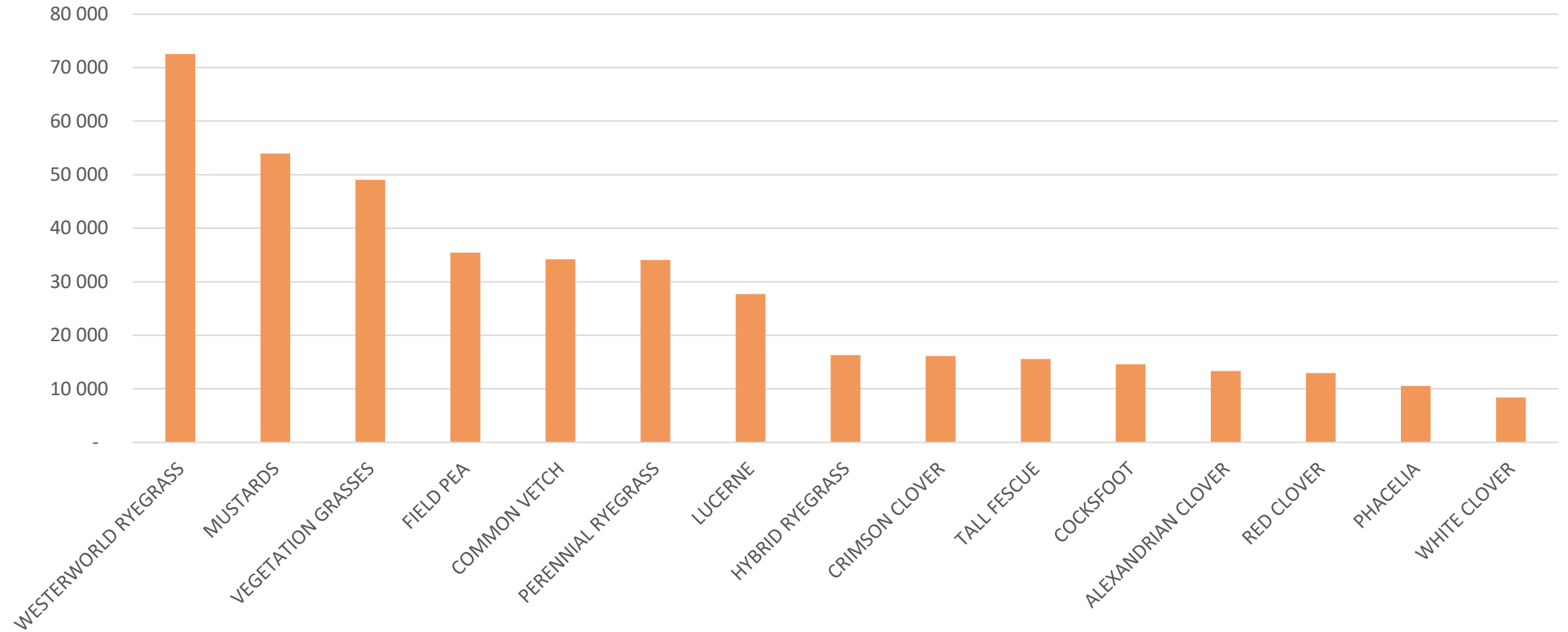


Fodder plants sales review - 2021/2022 (qtx)

> 40% of sales are imported seeds



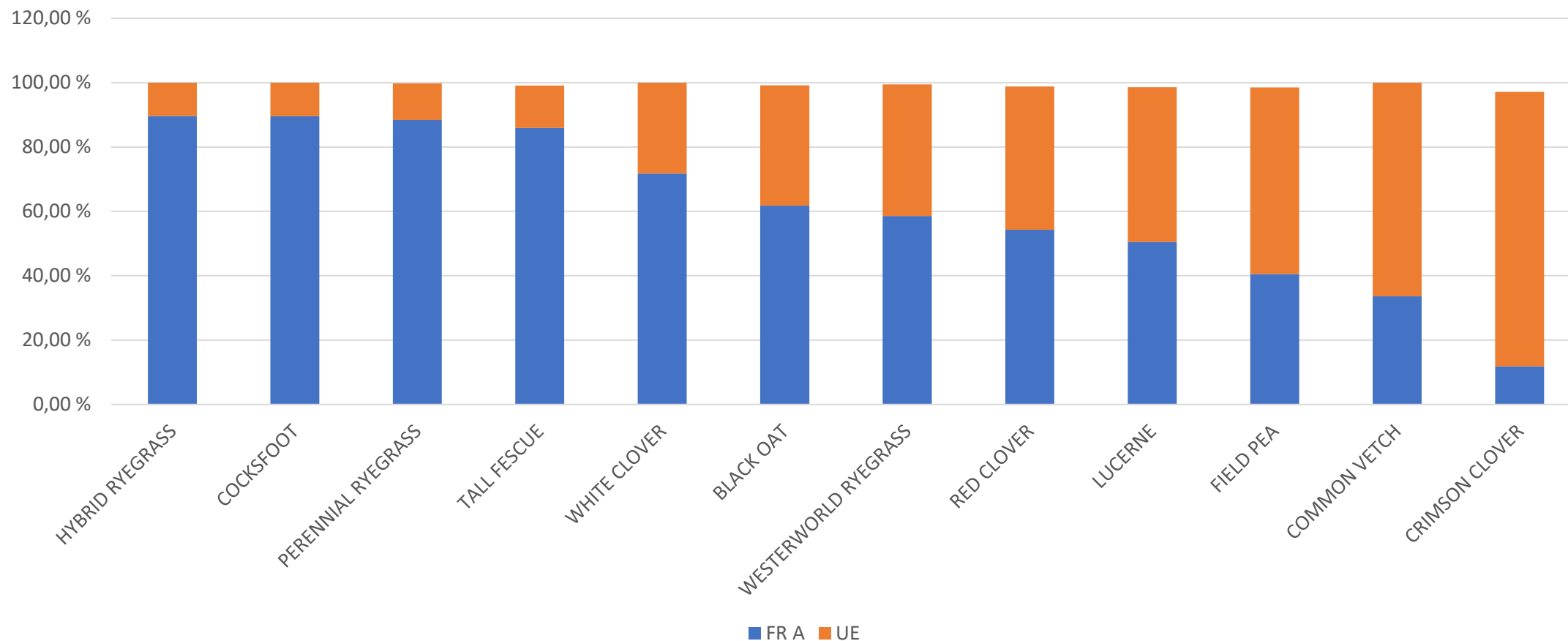
TOP 15 sales in France by forage species 2021/2022 (qtx)



Source SEMAE 2022



Share of French catalog among top-selling species – 2021/2022



Source SEMAE 2022





semae

Toutes les semences pour demain

Thank you