



On March 11, 2021, the **International Online Seed Forum** was organized by the Ukrainian Seed Association, Information Agency APK inform, and the Netherlands Embassy in Ukraine. The event gathered 186 participants from 21 countries. 12 speakers shared their vision on the actual issues in the seed sector.

In this document, we share highlights of only 4 speakers at the forum. More please see on the [discussion page of the event](#). (in Ukrainian).

According to **Michael Keller, General Director of the International Seed Federation**, if the seeds are not right, the food cannot be right, and the seed sector should respond to the changing food habits.

Today, according to M. Keller, there is an increase in the turnover of seeds worldwide. Many countries are trying to stockpile more, which should affect seed production. Over the past 20 years, the world seed market has increased 10 times.

"We should not forget that no country is able to fully provide farmers with their own seeds, which contributes to increasing trade," - said the expert.

The ISF Secretary General also noted that the pandemic has made some changes in the eating habits of people around the world, who have become more interested in the quality of food, its production.

"As the seeds are recognized as the starting point and the most important point for quality food production, the population has become more interested in its origin. We understand that investment in "healthy" food and, consequently, in research in the field of seeds, innovations in genetic engineering should be increased today. After all, if there are no necessary seeds today, there will be no harvest tomorrow," M. Keller added.

Contribution of seed sector through healthy improved seed that is disease free and resistant to pests. Business will not survive without intellectual property protection. Critically important tasks for all players: access to genetic resources, conservation and use of genetic resources. All players are committed to the fight against illegal practices.

The real challenge for the entire market in March 2020 was the closure of borders. There were huge concerns about the supply of seeds, and food gap even increased. "At that time, it was very important to solve the problem of seed supply to many countries that are dependent on imports of this product in a short time. The sowing campaign was at risk in a number of countries, there were problems with the transportation of seeds. However, many seed companies managed to overcome all the challenges, there



was also a constant dialogue between the countries, which further reduced the impact of the pandemic and quarantine restrictions on the seed market, including seed trade,"



Cesar Gonzalez of the European Seed Association Euroseeds

shared with the audience main trends of agricultural development in the European Union: reducing the use of pesticides, less fertilizer application, increasing the share of organic farming, as well as increasing biodiversity. These are the prospects of the EU market for 2021-2030.

In addition, a higher load on agricultural / arable land is expected. Less vacant land, expansion of forest areas, support of permanent pastures. Digitization will be the main factor in increasing crop yields. The main trends also include increased demand for locally produced food and short supply chains. It is expected that consumer choice will be increasingly determined by nutritional value, origin of products, and

environmental aspects.

"In the coming years, against the background of declining arable land in the EU, we still expect an increase in cereal yields, which will ensure their stable production. The area under wheat and barley may be reduced, but maize must remain stable or grow slightly. As for oilseeds, in 2021-2030 the production of sunflower and soybeans will increase, and rapeseed production will decrease due to various factors of influence. We expect an increase in both the area and yield of protein crops. Stable areas will remain under sugar beet, while its yield should be higher," said Euroseeds S. Gonzalez.

Head of the business projects service of IA "APK-Inform" **Andriy Kupchenko** presented the outlook of the Ukrainian seed market.

Ukraine advances in the seed production. A number of international brands are present in Ukraine with their seed production. Equivalence of Ukraine's seed certification scheme is recognized by the EU. Imported seeds account for only 2-3% of the total seed fund of the main crops of Ukraine.

According to the Customs Service of Ukraine, over the past three years, imports of seeds of major field crops to the country exceeded 60 thousand tons, and in 2020 amounted 48 thousand tons, which is only 2-3% of the total seed stock of crops. Major seed fund of Ukraine is formed by wheat seeds, because this crop has the highest sowing rates. At the same time, only two field crops - wheat and barley - form 80% of the country's seed fund. That is why the volume of imports of wheat seeds is very small, i.e. the seed fund is almost 100% of Ukrainian production. The situation with barley is almost the



same, but Ukraine buys seeds of brewing varieties. As for other crops, the largest share of imported seeds is sunflower - 70-80% by 2020 and 58% in 2020. For corn, this figure used to reach a one third, and in 2020 fell to 19%. An increase in the share of imported seeds is observed from rapeseed - up to 44% in 2020, against 32% in 2017," said Mr. Kupchenko. Although Ukraine produces more sunflower, rapeseed and corn seeds in the recent years, but the Ukrainian market still has a very significant share of imported seeds of these crops.



It is very important for the Ministry of Economic Development, Trade and Agriculture of Ukraine to accelerate integration of the Ukrainian seed industry into world politics, said **Deputy Minister Taras Kachka**.

Major success that has been achieved is Ukraine's participation in the Seed Schemes of the Organization for Economic Cooperation and Development (OECD). I am glad that today we are a participant in grain, cruciferous and other oil or yarn crops, sugar and fodder beet. In September 2020, we applied to join the OECD bean Seed Schemes. This is very important for Ukraine, as well as making it possible to export seeds to the European Union. On October 21,

2020, we celebrated the decision of the European Parliament to include Ukraine in the list of countries, not members of the EU who have the right to export to the European market seeds of cereals - wheat, triticale, oats, barley, rice, rye, corn and sorghum.

According to Taras Kachka, the ministry is actively working on improving the procedures for registration of plant varieties and certification of seed products. Regarding the intellectual property, the relevant orders are approved almost weekly, which is also a good sign of the attention paid to the seed segment in the activities of the ministry.

"According to the data of the Ministry of Economic Development, since the beginning of 2021, 77.15 thousand tons of seeds have been certified in Ukraine, of which 56.46 thousand tons are produced in our country. This means that we have the potential for the development of seed production," said the Deputy Minister.

Mr. Kachka agrees that the climate policy and global demand for food will impact the future of the seed industry the most. "We can already see that the EU aims to reduce the use of pesticides and agrochemicals, while increasing organic production. This raises questions about the efficiency of agriculture and the ability to meet demand for food products, including demand in grain. Other countries, who are important players in the global market, such as the United States, say that this can be achieved through the use of more efficient plant varieties, i.e. genetically modified. All this raises the debate again about which seed material can be used, which plant varieties can be allowed and which not," he concluded.