



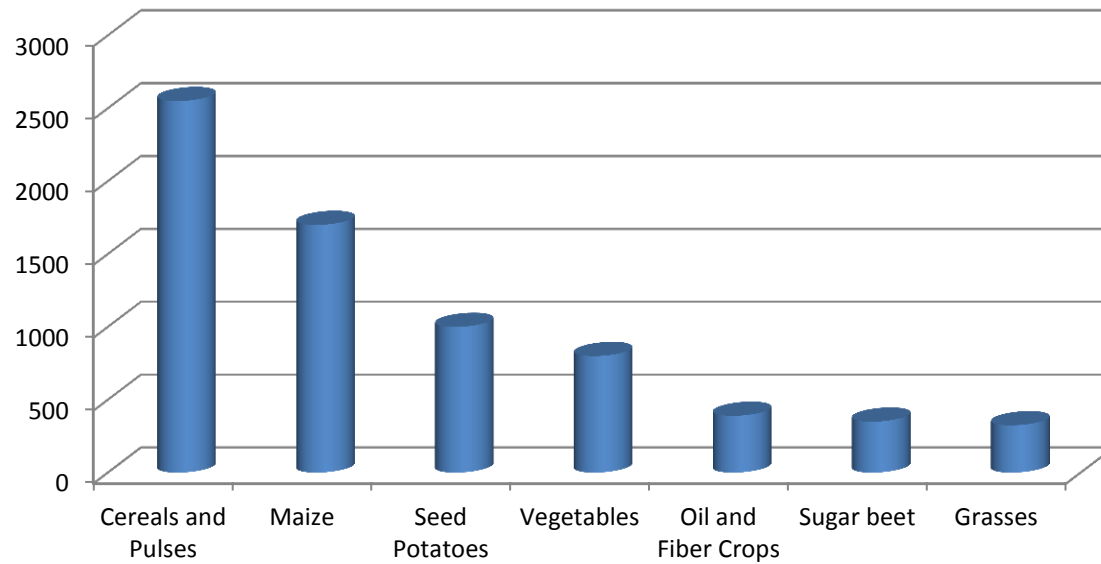
# ESA

## European Seed Association

**Representing the Seed Industry**

## EU seed market – key facts and figures

**Total value EU Seed Market (6.8 bn €)**



# EU seed industry – key facts and figures

Item	
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



# 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



# Food Supply

## Yield from 1 kg of seed at average seeding rates

<u>Crop</u>	<u>Yield from 1 kg seed</u>
Maize	500 kgs grain
Oil seed rape	<1.000 kgs oil seed
Tomato	3.0 – 9.0 mill. kgs tomatoes
Sugar beet	10.000 kgs sugar
Soybean	80 kgs beans
Wheat	70 kgs grain

**Seeds are high-tech, high value added products!**



# ESA Introduction

- ESA is the SINGLE voice of the European seed industry
- ESA represents the European seed industry via the European institutions and their representatives
  - European Commission
  - European Parliament
  - Council of Ministers
  - Community Plant Variety Office



# ESA Introduction

- International involvement and observer status
  - **ISF, UPOV, OECD, ISTA, IPPC, FAO etc.**
- ESA is in continuous contact with other industry associations dealing with agriculture and biotechnology, with non-governmental organisations, the international press and the wider interested public



# ESA History

- founded in November 2000
- merging former seed industry associations as well as individual companies into one single EU wide organisation
- representing the totality of the European seed industry active in research, breeding, production and marketing of seeds



# ESA Mission

## ESA's mission is to work for:

- effective protection of intellectual property rights relating to plants and seeds
- fair and proportionate regulation of the European seed industry
- freedom of choice for customers (farmers, growers, industry, consumers) in supplying seeds as a result of innovative, diverse technologies and production methods



# ESA's principal function

**Inform, represent and lobby on all seed related issues:**

- seed marketing, incl. GM and organic seed
- IPRs ; biodiversity ; access ; research
- plant/seed health ; seed treatment ; environment
- land use and food production

**Help to solve collective problems of Members**



# ESA's activities

## Information

- **Monitoring**
- **Definition of seed related issues**
- **Propose industry action**
- **Communciation to ESA Members**
- **Follow-up**

## Dialogue platform

- **Facilities**
- **ESA meetings**
- **Third party meetings**
- **Annual Meeting**
- **Technical assistance**

## Lobbying

- **Policy strategy**
- **Implementation**
- **Communication / media relations**
- **Representation**
- **Networking**

# ESA Members today

## ESA Membership today

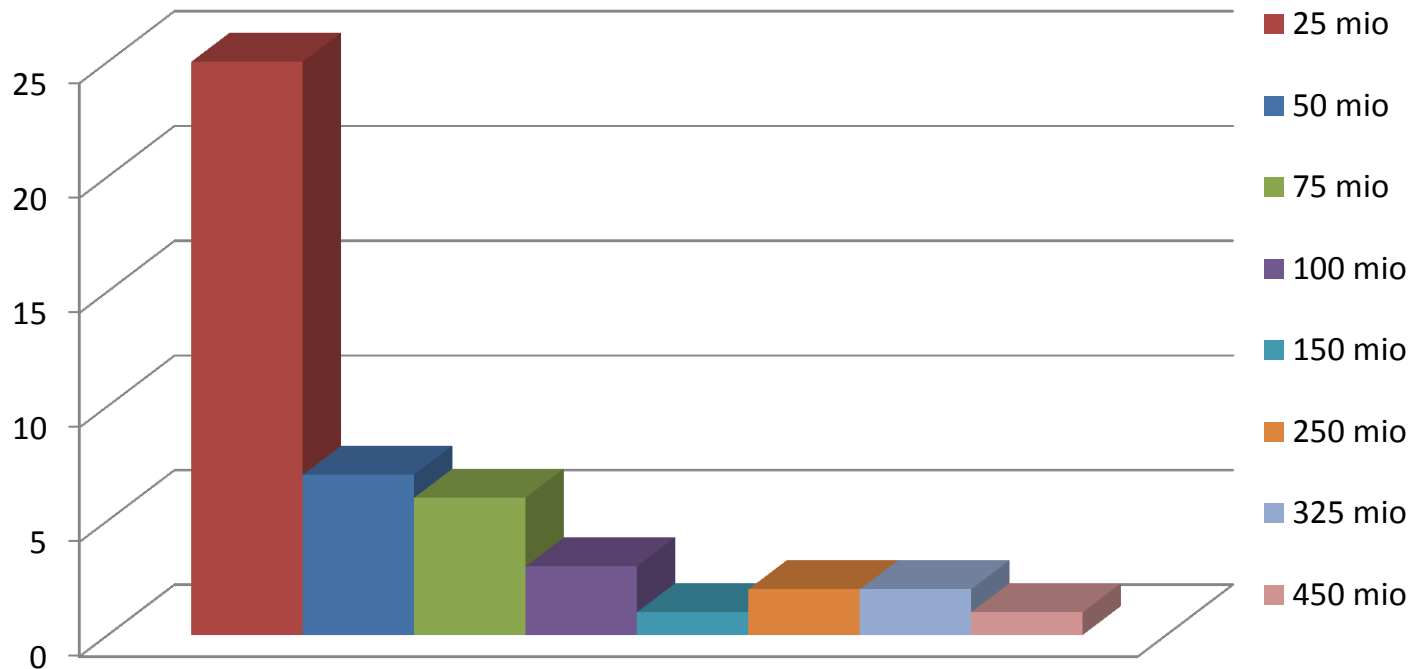
- 37 national seed associations  
**(ESA Association Members)**
- 52 direct company members  
**(ESA Individual Members)**
- 24 associate company members  
**(ESA Associate Members)**

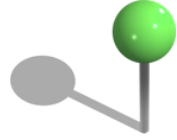


# ESA Individual Members

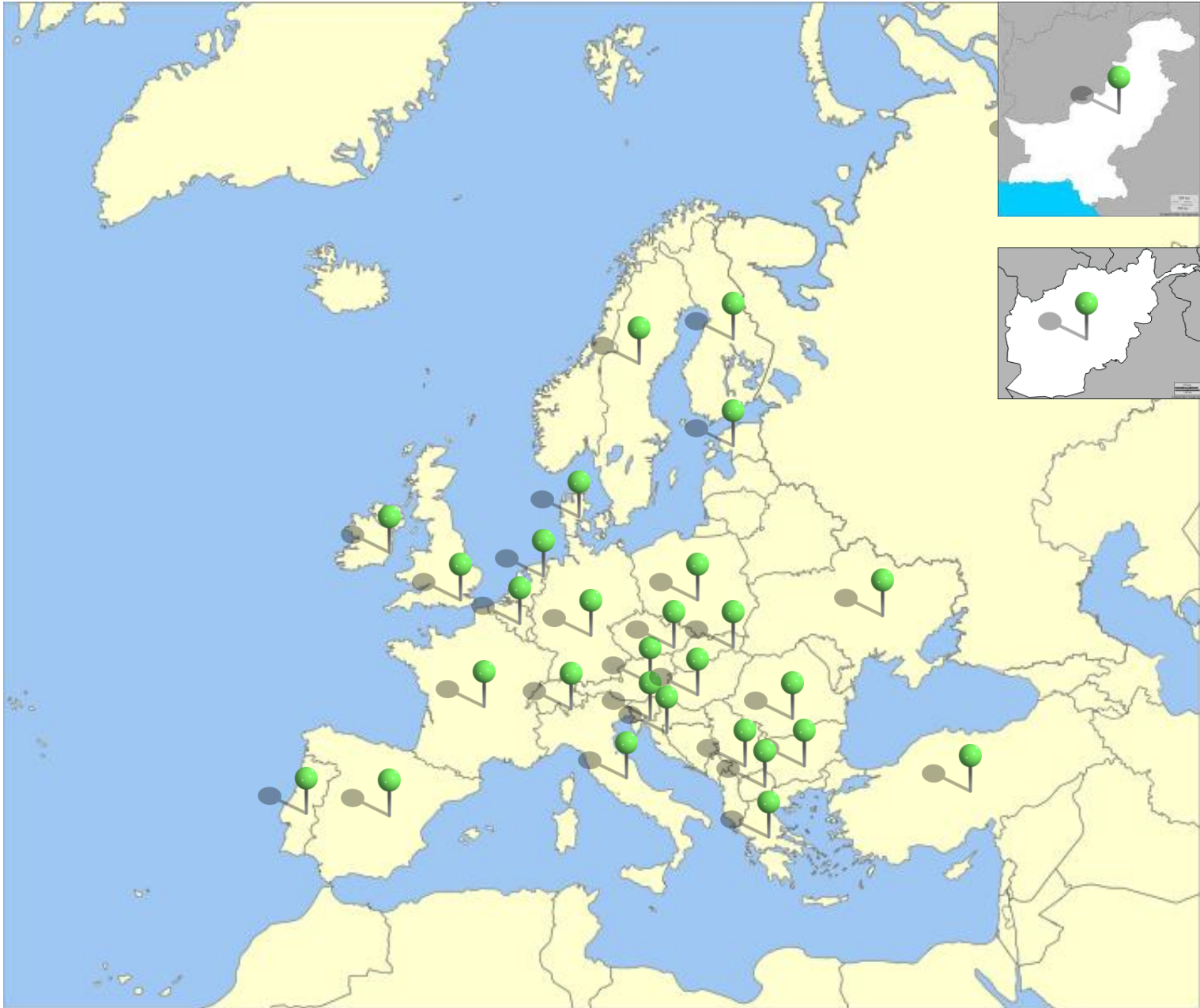
Number of companies

EU Turnover





# ESA Association Members today



# ESA Association Members

ABO



ABV



AIC



AMSEM



ANSEME



APROSE



APVD



ASPM



ANOVE



ASSOSEMENTI



BDP



BSPB



CMSSA



CSA



DAPB



DHSA



DSTA



EEPES



FSTA



HCSA



PdB



P.I.N.



Plantum NL



P.V.D.O



SAM



SAS



SASTAB



SAU



SEEMNLIIT



SEMZABEL



SS G.I.Z.



SSTA



Swiss Seed



TURKTED



UFS



VETOMAG



VDPUSÖ



# ESA Individual Members

**AGRICO** **DLF TRIFOLIUM SEEDS & SCIENCE** **BARENBRUG** **Dow AgroSciences** **BAYER** **bejo** **DSV** **Elsoms Seeds**  
*Innovation for the Westhutum* *the start of better crops*

**inno seeds** **HZPC** **Limagrain** **Graines GAUTIER** **GERMINAL HOLDINGS** **FIGR** **GERMICOPIA** **FLORIMOND DESPREZ** **GROUPE EURALIS**  
*Growing with our potatoes* *Créations Variétales*

**KWS** **KRISHIDHAN Seeds Limited** **MAÏSADOUR semences** **Momont** **MONSANTO** **BNA** **nunhems** **PIONEER**  
*LA FORCE FERTILE* *A DU PONT COMPANY*

**plan spg** **PV** **EUROPLANT** **FRAGT** **RAMIRO ARNEADO semillas** **RIJK ZWAAN** **SAATEN UNION** **SAATZUCHT S'LEINACH**

**SAKATA SEED** **SECOBRA recherches** **SEMILLAS fito** **serasem** **SICASOV** **Solana** **syngenta** **TAKII**

**TOZER SEEDS** **ZERAIM IBERICA** **Zeta Seeds** **ENZA ZADEN** **in vivo** **LEMBKE**  
*The Seed Company* *Semillas de España* *Au cœur de nos métiers, le vivant*

**Hazera Genetics** **ZELSEED** **SEM-LUCA** **NORIKA**





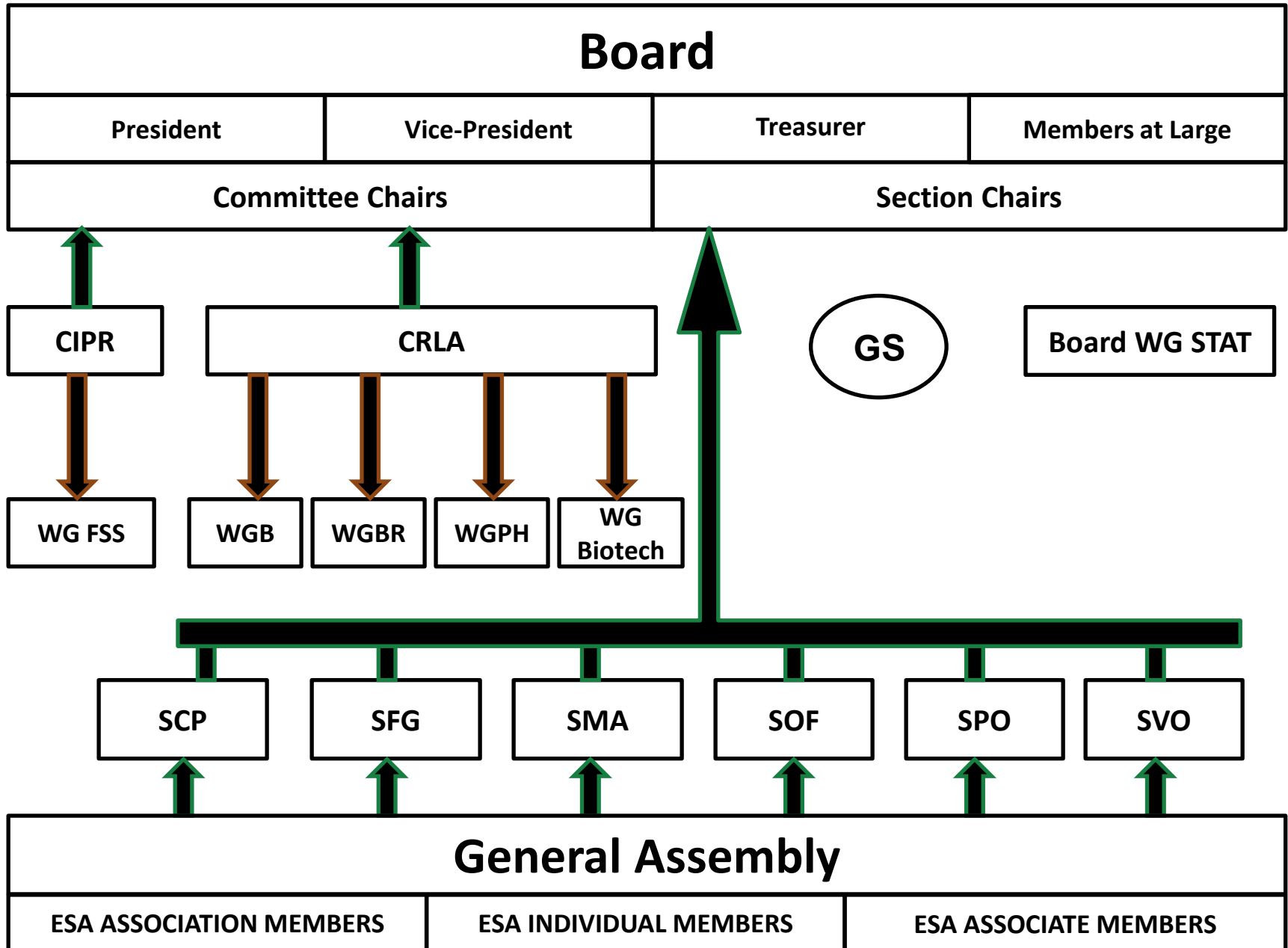
# ESA Associate Members



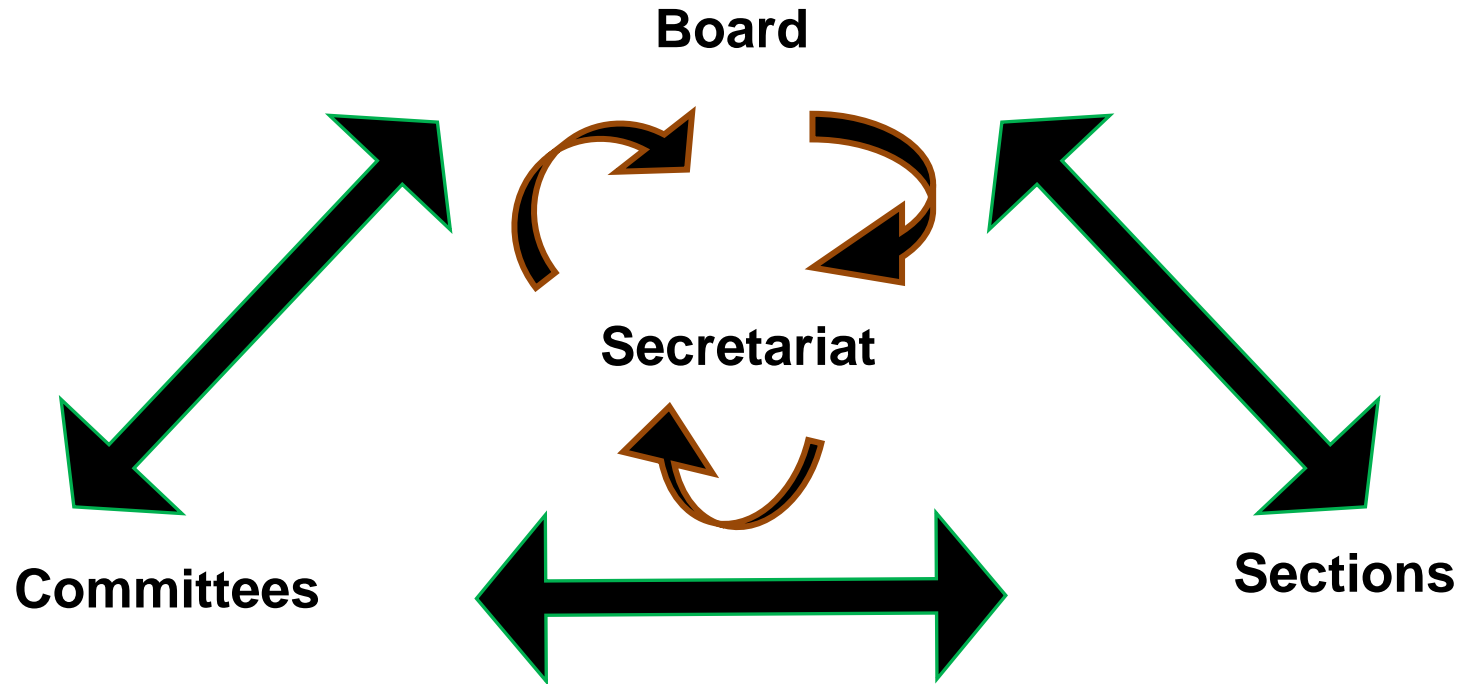
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# ESA's structure



# ESA's governance



- **Subsidiarity**
- **Decisions on the relevant level**
- **Discussion on higher level where necessary**
- **Only strategic, no operational decisions**
- **Management and implementation by ESA Secretariat**

# ESA bodies

## Board, Executive Committee and STAT

### ESA Board

**Board EC**

Executive Committee

**Board WG STAT**

Working Group Seed Treatment  
and Technologies



# ESA bodies

## Committees and Committee Working Groups

### ESA COMMITTEES:

**CRLA** Committee Regulatory and Legal Affairs

- **WGB** Working Group Biodiversity
- **WGBR** Working Group Better Regulation
- **WGBT** Working Group Breeding Technologies
- **WG Biotech** Working Group Biotechnology
- **WGPH** Working Group Plant Health

**CIPR** Committee Intellectual Property and Breeders' Rights

- **WG FSS** Working Group Farm Saved Seed



# ESA bodies

## Sections and Section Working Groups

### ESA SECTIONS:

**SCP** Section Cereals and Pulses

**SFG** Section Forage Plants and Amenity Grasses

**SMA** Section Maize

**SOF** Section Oil and Fibre Plants

**SPO** Section Potatoes


**SVO** Section Vegetables and Ornamentals

**SVowic** Section Vegetables and Ornamentals -  
Working Group Integrated Companies


**WGSB** Working Group Sugar Beets



# ESA Board Members

 **Amberger, Christoph**  
**(President)**




 **Backx, Gerard**  
**(Vice-President, Chair of SPO)**



 Brauer, Dietmar (Chair SOF)

 Herrlinger, Christoph (Chair of CRLA)

 El-Menschawi, Ibrahim (Chair SMA)

 Marciniak, Karol (Member)

 Ceccarelli, Fabrizio (Member )

 Remijnse, Ko (Chair of SVO)

 Chobot, Jaroslav (Member)


 Segonds, Daniel (Member)

 Gohn, Michael (Chair of SCP)

 Suelmann, Marian (Chair of CIPR)

 Goig, André (Member)

 Devron, Eric (Treasurer)

 Gouache, Jean-Christophe (Member )

 van Straalen, Gert (Chair of SFG)



# ESA General Secretariat



**Garlich von Essen**  
Secretary General



**Bert Scholte**  
Technical Director



**Szonja Csörgö**  
Manager Intellectual Property  
and Legal Affairs



**Jean-Paul Judson**  
Manager Public Affairs



**Katharina Bernardz**  
Assistant to the SG and  
Communication Officer



**Marguerite Ryan**  
Assistant & Reception



**Gaia Serena Carbone**  
Assistant & Reception

