

Development of Global Seed Industry

11th February 2023 Bangladesh Seed Congress-2023

Michael Keller, Secretary General, International Seed Federation

International Seed Federation

Voice of the global seed sector since **1924**

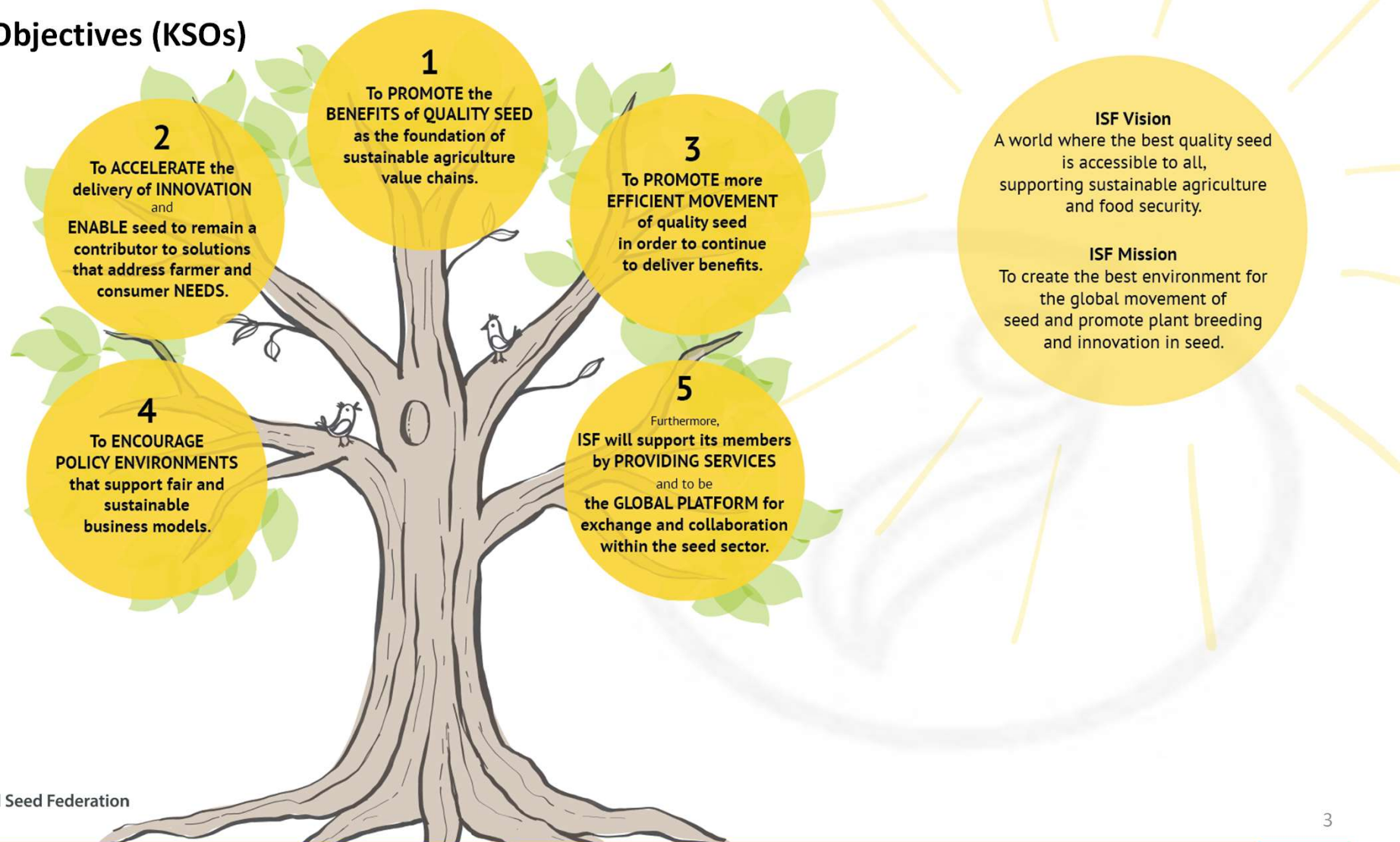
67 National Seed
Associations

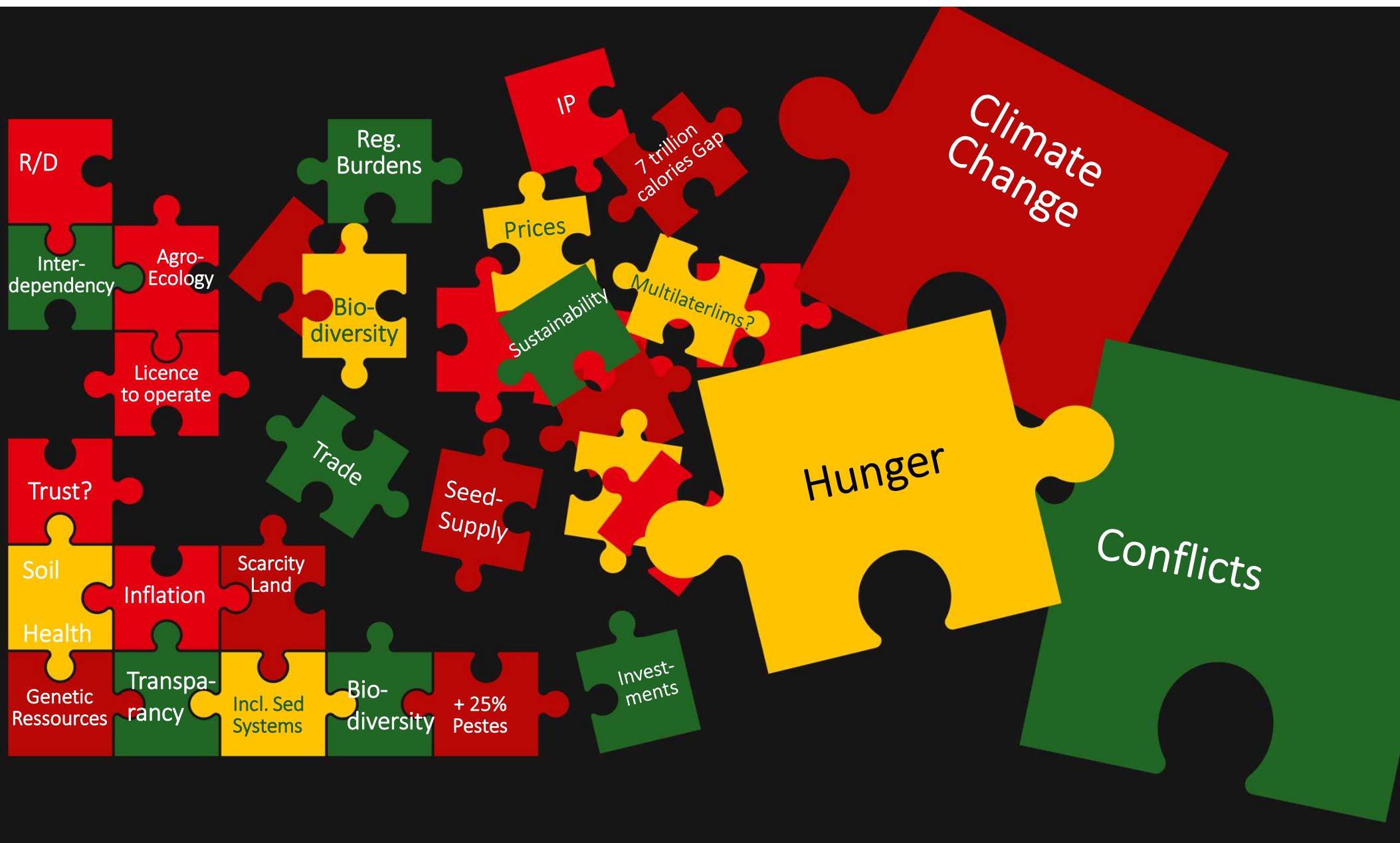
7500+ companies

90 Countries



Key Strategic Objectives (KSOs)





No
“one-size-
fits-all”

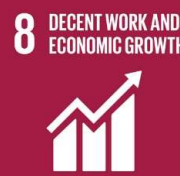


What is ahead of us?

- Increase of 70 % Food production
- Food gap 850 million people
- In 10 years + 9% population
- In 2050 at least 9.5 bn people
- In 10 years + 30% world income increase
- Changing eating habits + healthier and sustainable
- + 68% milk and meat consumption
- Gap of 7 trillion calories

Our Journey to Sustainability and Seed Resilience
is based on Efficiency and Innovation
Starts with Seed – No one size fits all solution!!





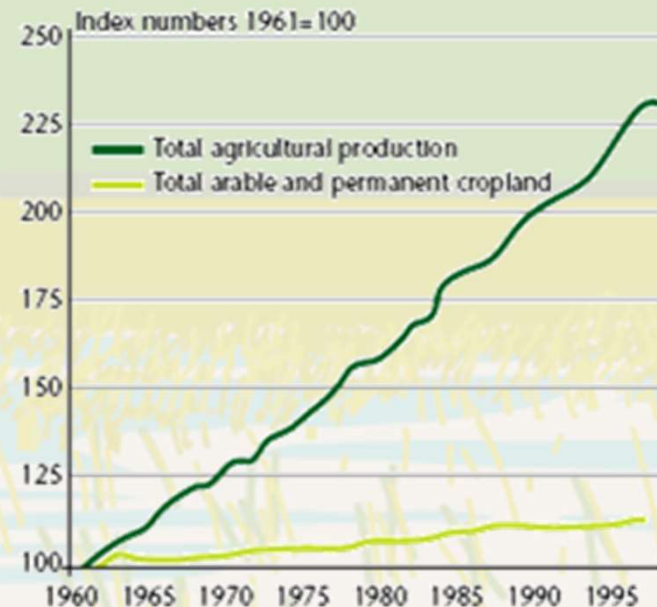
“A world where the **best quality seed** is accessible to all, supporting **sustainable agriculture** and **food security**.”

Seed trends

- ✓ Global seed market growing
- ✓ Movement of seed increasing
- ✓ Faster breeding and commercial processes
- ✓ Plant breeding & seed production by private sector + increased investment
- ✓ No country can fully supply farmers with seed of their choice solely from their own production
- ✓ Limited access to quality seed in many countries



Steady Increase Productivity – 40% of food production would not exist without:



Source: WBC for Sustainable Agriculture, Crop Losses to Pests (E-C Oerke); Journal of Agricultural Science (2006)

- 1) improved seed
- 2) crop protection

do not forget:
mechanisation
irrigation
fertilisers
crop protection



It's about our joint Capacity to
provide

Seed Choice for Farmers

- to address at local level
Life on Land, end Hunger, ,
Climate change and
Consumers demands!
Leave no one behind! •

SEED SECTOR DECLARATION - OUR ENGAGEMENT!

ISF International Seed Federation
Seed is Life

SUSTAINABLE DEVELOPMENT GOALS

UNITED NATIONS FOOD SYSTEMS SUMMIT 2021

Seed as the starting point
Our sector takes part in the journey
to the Food Systems Summit 2021

DECLARATION

1 NO POVERTY

2 ZERO HUNGER

8 DECENT WORK AND ECONOMIC GROWTH

12 RESPONSIBLE CONSUMPTION AND PRODUCTION

13 CLIMATE ACTION

15 LIFE ON LAND

17 PARTNERSHIPS FOR THE GOALS

The grid contains logos for numerous organizations, including:

- AFSA, SAKS, STAK, asta, SAA, AMSAC, anpros, ASA, ASEG, URUPOV, APSA
- ANOVÉ, CNSTA, BDP, Plantum, AGT, JASTA, KOSA, TSUAB, Euroseeds
- SEED PROCESSING HOLLAND, INARI, AGRICO, SEED SYSTEMS GROUP, SEED RIDGE
- EUROSEM, EUREDEN, EXCELLENCE, FROSEM, FOFEX, germains, Germinal, GRAINES VOLTZ, HM-CLAUDE, Semences de France, syngenta, TAKII
- AgSeeds, BASSO, CIS, CORTEVA, CHADERO EL CARMEN, CM seeds, el agro, GOLD MEDAL, MAY, Asia Seed Korea, YAMASA
- 丰德康 FOCOME, Higentec, Jewelry, 津和, 瓜龍山种业创新中心, 百利投, SAKATA, SEEDWORKS, 中地种业, TOKITA, Valley Seeds, 花の大和
- HUSEED, SIA, SANTOMO, CAST WEST SEED, nunheris, RAGT, RUK ZHANG, SAATBAU, INTERSEMILLAS, KWS, Limagrain, MEIJER POTATO

Seed as an essential driver

- R/D of private seed sector 15-20% of turnover
- Approx. 10 billions US \$ per year in 80+ crops in Northern and Southern Hemisphere
- Every year over 20'000 new varieties + 200'000 varieties accessible to world wide
- Impact for farmers:
 - **Ethiopia** introduction improved varieties X 5.7 yield increase (Source: Fair Planet)
 - better yield, better resilience, better product quality, better Livelihood!



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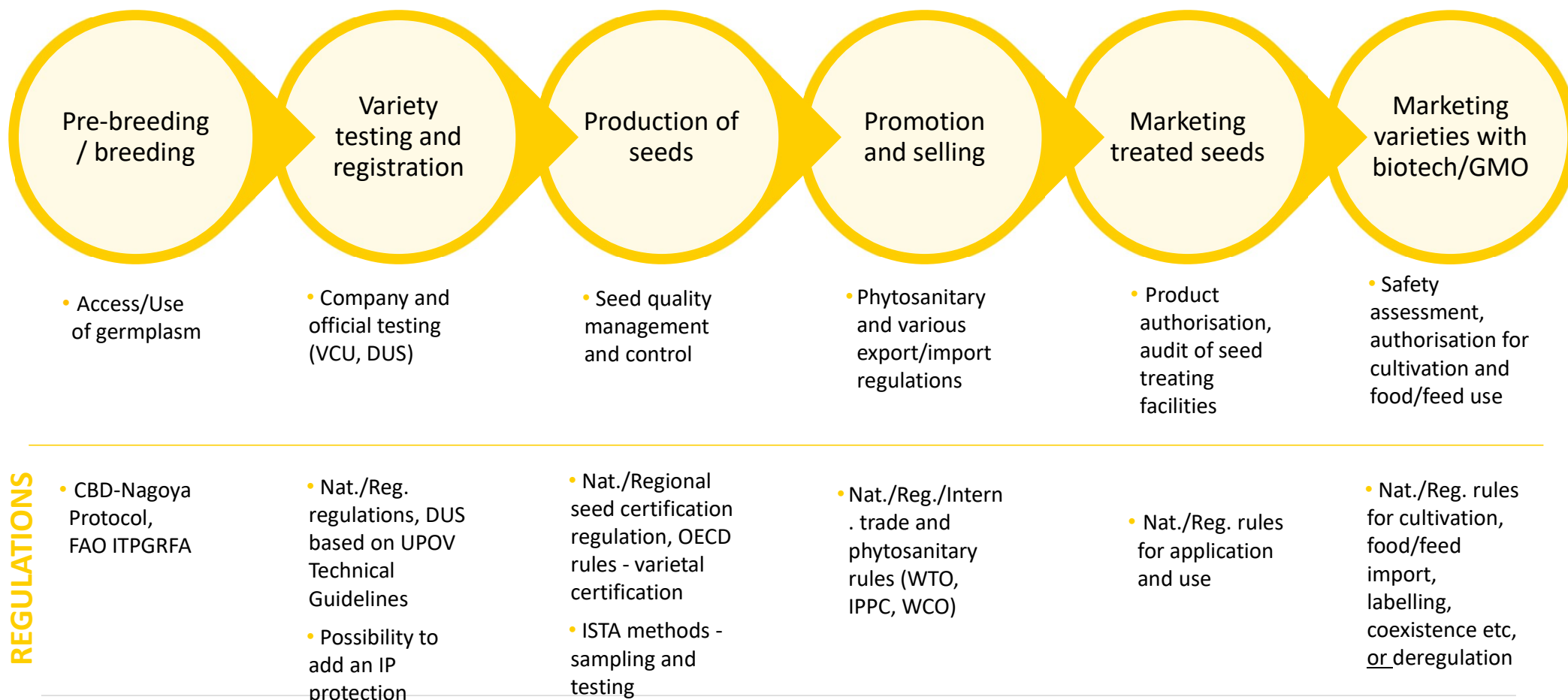
15 LIFE ON LAND



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Regulatory process



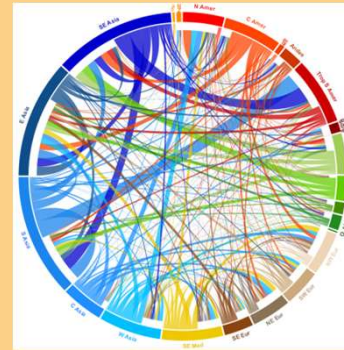
Conservation, Access, and sustainable use of genetic resources is essential

- Through our sustainable use of plant genetic resources – we create better varieties and diversity for in the field
- Access to other genetic resources in gene banks is needed



- Preferred tool:

“Conservation & sustainable use of PGRFA; access and benefit-sharing”



2 ZERO HUNGER



12 RESPONSIBLE CONSUMPTION AND PRODUCTION



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It is now!

Plant Breeding Innovation – Predictable Science based Regulations are necessary

- **Breeding is in our DNA!**
 - Yield, taste, nutritional quality, drought, salinity, disease resistances, pests, etc...
 - 80+ of Crops + thousands of researchers + hundreds of breeding programs.
- **Capacity to use all existing breeding tools**
 - Genome editing: + 40 Crops 30 countries – “improved performances”
- **Access to supporting technologies**
 - Digitalization, Bioinformatics, Big Data,...



Contribution

must be economically sustainable!

- Can a business without intellectual property protection be sustainable?

- Preferred tool :

UPOV

“Encourage the development of new plant varieties for the benefit of society”



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Consistent science based trade rules

To move healthy seed to different countries

- **Plant Health starts with Seed Health** from pre-breeding to commercialisation - we are committed!!
- Interdependency of seed supply
- Our work: International Seed Health and Regulated Pest List Initiatives
- Collaboration with IPPC + WTO + National Plant Protection Offices



2 ZERO HUNGER



3 GOOD HEALTH AND WELL-BEING



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All committed to the fight against illegal seed practices

- Livelihood and income of farmers
- Increased impact on our business
- Engagement everywhere



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12 RESPONSIBLE CONSUMPTION AND PRODUCTION



**“Is there anyone
expressing doubts...
that today it’s the time
to join our
complementary
strength in our diversity
in the seed supply chain
for sustainable
agricultural production
to adapt and adjust to a
changing world.”**



It is now!



We are ready to act!