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Report Highlights:

France is a major producer and exporter of planting seeds. However, France has a trade deficit in planting seeds with the United States. The leading product exported by the U.S. to France is corn for sowing. The French planting seed industry, which favors biotechnology, has been affected in 2004 by both French and European factors: first, the destruction of many test plots by opponents to biotechnology; second, a large number of regional governments officially discouraged biotech planting; and the EU Commission delayed the Regulation process to set thresholds for the adventitious presence of biotech in planting seeds.

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Includes Trade Matrix: No
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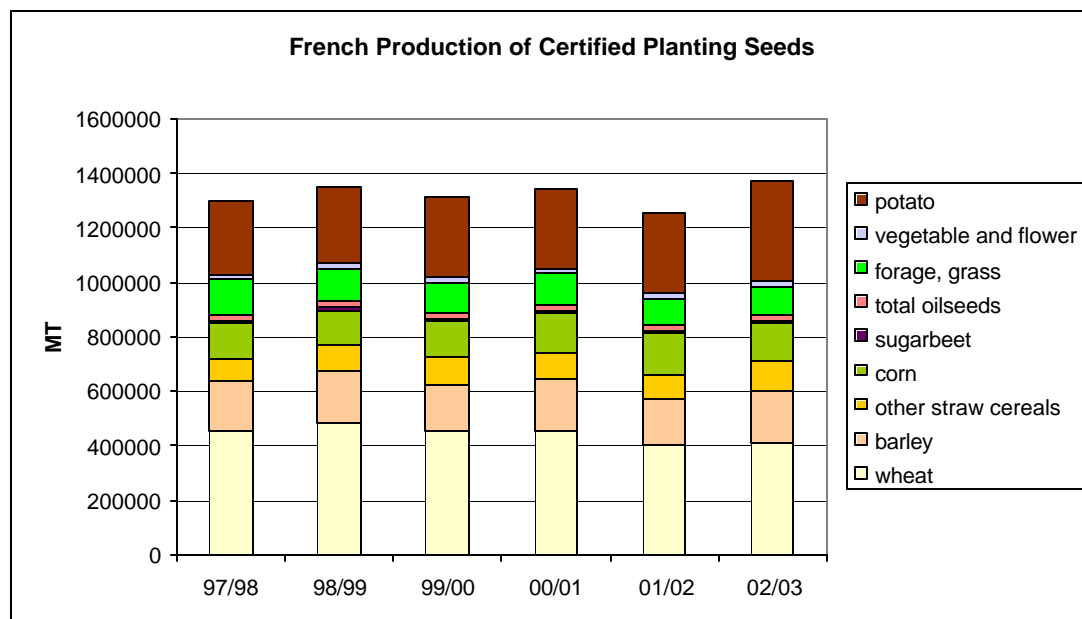
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Executive Summary

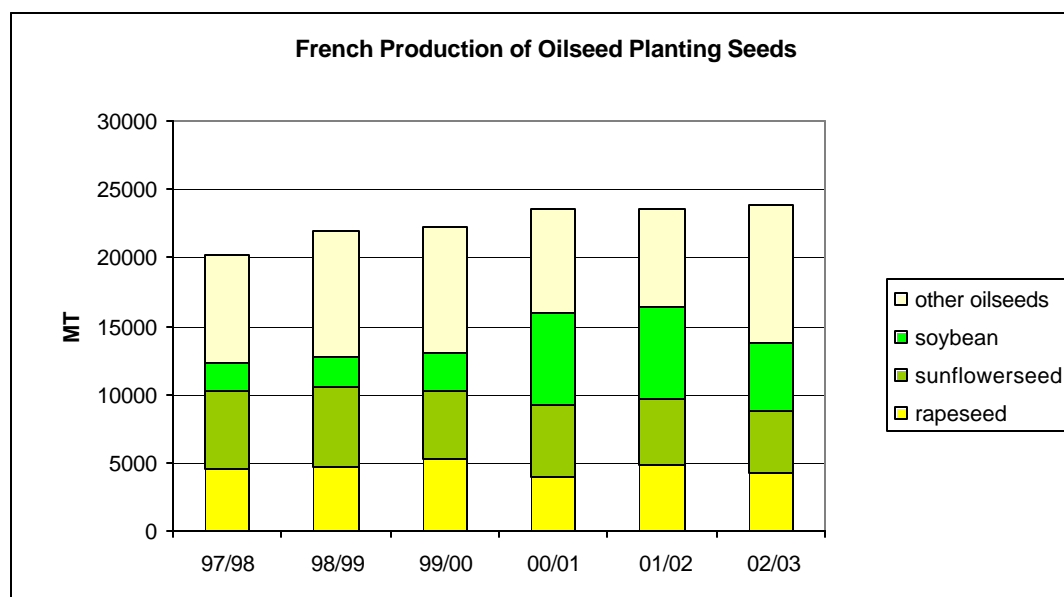
France is a major producer and exporter of planting seeds. However, France has a trade deficit in planting seeds with the United States. The leading product exported by the U.S. to France is corn for sowing. The French planting seed industry, which favors biotechnology, has been affected in 2004 by both French and European factors: first, the destruction of many test plots by opponents to biotechnology; second, a large number of regional governments officially discouraged biotech planting; and the EU Commission delayed the Regulation process to set thresholds for the adventitious presence of biotech in planting seeds.

Production

France is the largest seed producer in the European Union. According to the French planting seed association (GNIS), the trends and breakdown of French production of certified seeds was the following:



The graph below indicates the breakdown and trends of the French production of certified oilseeds (according to GNIS). It shows that domestic production of soybean seeds has developed significantly in the past three marketing years. While the area planted to soybeans in France is minor compared to the areas planted to other oilseeds, French production of certified soybean planting seeds is the largest. This is a result the growing concern over biotech seeds in France. A large share of soybeans grown in France is geared for food and/or organic production.



Seed Certification – Variety Approval

The French seed registration system is fully integrated within the EU seed registration framework. Seeds registered in any of the EU member states are now also registered in France, and vice versa.

The French seed sector is regulated by three main organizations. The "Permanent Technical Committee for Seed Selection" (in French "Comité Technique Permanent de la Sélection," or CTPS) is a technical committee answering to the French MinAg. CTPS is made up of representatives of the French MinAg, seed producers, traders and end users. CTPS sets the technical rules for registering seed varieties in the French Seed Catalogue. Any petitioner registering a new seed variety in the French Seed Catalogue must submit a detailed file to the CTPS.

To get into the French Seed Catalogue, a new variety has to pass several tests. These tests compare their agronomical and technical values to control varieties and measure their stability and homogeneity. The Study and Control Group for Varieties and Seeds (in French "Groupe d'Etudes et de Contrôle des Variétés et des Semences," or GEVES) conducts these studies on 100,000 test plots across France. GEVES is made up of representatives from the French MinAg, the National Institute of Agricultural Research (INRA), and the French seed industry organization (in French "Groupement National Interprofessionnel des Semences," or GNIS). Please see GEVES website for more information: <http://www.geves.fr> (in French)

If a new variety passes the tests, it is listed in the French Official Seed Catalogue and is registered for the entire EU. Varieties registered in the European seed catalogue are listed on the GNIS website, which also contains information in French and in English on seed certification: <http://www.gnis.fr>

Certified seed production is controlled by the "Service Officiel de Contrôle et de Certification" (SOC), which is the joint responsibility of GNIS and MinAg. The MinAg establishes the official criteria for certification. Random tests in the field and at processing plants verify the sanitary status of the seeds, the germination capacity and the moisture level. The SOC has the power to levy administrative and economic penalties, including fines and plant closures.

Intellectual Property Rights

In France, the framework protecting new seed varieties is the 1961 UPOV (Union pour la Protection des Obtentions Végétales) Convention, which was strengthened by the 1991 Act (UPOV 1991). The UPOV system is designed to protect the work of breeders, takes into account users' needs, and specifically reserves rights for further variety development. The production and sale of a protected variety are subject to the approval of the variety breeder. The 1991 UPOV Convention is still under discussion. In contrast to the patent process, used in the United States, these Conventions allow the use of a Plant Variety Protection (PVP) to develop another variety without having to pay a fee.

Biotechnology

Pending EU Regulation on Biotech in Planting Seeds

The French planting seed industry strongly condemned the EU Commission's September 8 announcement to delay the Regulation setting biotech thresholds in planting seeds. In a press communiqué available on the website <http://www.ogm.org>, the French planting seed industry considered that the EU Commission's attitude was irresponsible, and believes that the lack of biotech regulation in planting seeds works against for European planting seed companies and farmers.

Late 2003, the European Scientific Committee proposed the following thresholds of adventitious presence of biotech in planting seeds: 0.3% for rapeseed, 0.5% for corn, and 0.7% for soybeans. Organic farmers favor lower thresholds, at 0.1%, which is the biotech detection limit. The French planting seed industry believes the thresholds proposed by the European Scientific Committee are too low, and consider the organic proposal is unacceptable.

Open Field Test Plots in 2004

In 2004, there were 32 biotech events tested on 48 open field test plots, covering 7.2 ha. Most of the biotech crops grown on test plots for experimentation were corn varieties. Some tests were also conducted on biotech rapeseed, grass, coffee, and poplar. A complete description of these field trials is available on the French MinAg biotech website at: <http://www.ogm.agriculture.gouv.fr>

Like every summer, biotech opponents destroyed a number of test plots in July, August and September 2004 (see reports FR4036, dated 8/5/2004, FR4041, dated 8/19/2004, and FR4045, dated 9/7/2004). The French seed industry strongly condemned these actions.

On September 24, the results of a poll conducted by the French institute CSA and ordered by the French seed industry were released. They indicate that 56% of the French public disapprove of these test plot destructions, and 18% condemn these actions all together. However, 13% of the French public still show a determined opposition to biotechnology. For full results on this poll, please see <http://www.ogm.org>

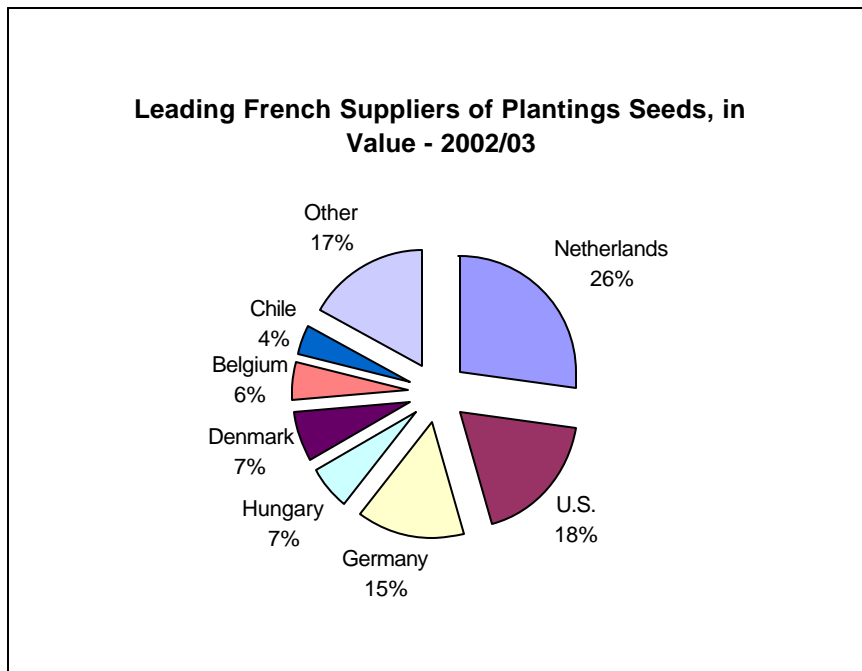
Regional Authorities Opposed to Open Field Test Plots

In April 2004, the Socialist party won a large majority at the French regional government level (Conseils Regionaux), with the help of green voters. Most of the Presidents of these regional governments promptly called for no biotech testing in open fields in their regions, in the name of the precautionary principle.

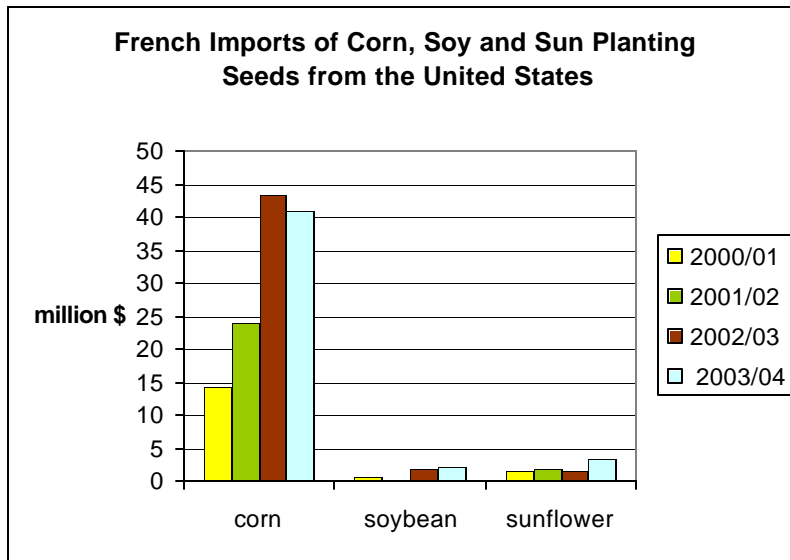
The French planting seed industry reacted to these decisions in a press communiqué released on May 17. They consider these actions unfounded (since the regulation authorizing biotech experimentation is extremely rigorous), illegitimate (since the French Ministry of Agriculture is the only competent authority to take such actions), and unacceptable.

Trade

The United States is France's second largest supplier of planting seeds after the Netherlands, as indicated in the graph below.



France has a trade deficit in planting seeds with the United States. The largest categories of planting seeds of interest imported by France from the United States are corn seeds, soybean seeds and sunflower seeds. The graphs below indicate that the leading category in value and quantity is, by far, corn seeds.



U.S. corn planting seeds mainly compete with Hungarian and Chilean products on the French market, as well as domestically-grown seeds.

