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Netherlands

Planting Seeds

Annual

2003

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Report Highlights:
In 2002/2003, Dutch planting seed exports increased by ten percent to Euro 961 million. This growth has been driven mainly by increased exports of vegetable seeds.

Includes PSD Changes: No
Includes Trade Matrix: No
Annual Report
The Hague [NL1]
[NL]

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Executive Summary

The Netherlands is the world's largest exporter of seed potatoes and the second largest planting seed exporter in the world. The sector consists of about 180 seed companies employing about 10,000 people, with an annual sales volume of approximately Euro 2 billion.

During the past four years, Dutch planting seed exports grew from Euro 795 million in 1999/2000 to Euro 961 million in 2002/2003. This growth has been mainly driven by increased exports of vegetable seeds, comprising two-thirds of the total export value (or Euro 658 million in 2002/2003). Spain has been the most important growth market for Dutch vegetable seeds. Dutch imports of vegetable seeds remained stable at around Euro 175 million during the past four seasons. Compared to the production and export of vegetable seeds, Dutch production and trade of grass seeds is relatively stable. In 2003, the acreage planted to seed grass recovered from a low level in 2002 back to the average of the past ten years. There have, however, been changes in the production of grass seed, by variety. English Rye Grass seed production is expected to increase, while production of Kentucky Blue Grass and Red Fescue seed is forecast to decline in 2003. These changes are mainly a result of price fluctuations and resulting profitability of the production.

Conversion rates:

Exchange Rate			
Year	**U.S. $**	**Euro**	**Dutch florin (guilder)**
1999	1	0.94	2.07
2000	1	1.09	2.39
2001	1	1.12	2.46
2002	1	1.06	-
*2003	1	0.88	-

* Jan - Sep first nine months

Outlook

U.S. planting seed exports to The Netherlands have an annual value of about Euro 60 million. Opportunities for U.S. companies exist in specialty seed markets, such as organic seeds, specialty lettuce and other vegetables, specialty grass seeds for golf courses and sports fields. There are no sales of genetically modified seeds for food and feed crops in The Netherlands. U.S. exports of some conventional seed varieties, such as corn, have been seriously affected by the biotech restrictions in the EU. Future U.S. planting seed exports to the EU will be greatly affected by traceability and labeling legislation for seeds.

Marketing

Market Development Opportunities

There is reportedly a growing demand for organic seeds. Because demand for seeds for organic agriculture outstrips supply, organic farmers may use ordinary seeds until 2004. By January 2004, new EU legislation, EC/2092/91, will be implemented which will make it obligatory to use exclusively organic seeds for organic agriculture. At the moment, the EC is investigating the need for exemptions for certain crops in some countries. From a survey of the European Seed Association (ESA) it was reportedly concluded that the supply of organic seeds will be sufficient by January 2004. In 2002, breeders reportedly produced 530 varieties of organic seeds for the European market. The sector anticipates, however, short supplies of seeds for some minor crops. Anticipating the growing demand for organic seeds, the Louis Bolk Institute, the Seed Association (Stichting Zaadgoed) and the NAK published a catalogue containing about 700 varieties of organic seeds.

Marketing Channels and Facilities

Increasing costs for research and development in the plant breeding and propagation sector have led to concentration in the Dutch seed industry. This trend is expected to continue. An example of the concentration is the take-over of Cebeco Seeds by the Danish company DLF-Trifolium. With the take-over DLF has a reported turn-over of Euro 270 million and is now the world's largest producer of grass seeds. Vertical integration is also increasing in the Dutch sector. A fairly new marketing strategy in the Dutch seed sector is to provide seeds to specific marketing channels of growers and retailers, which will receive a monopoly on the product. The growers will have to comply with the branding principles laid down by the seed company.

Competitor Activities

Since April 2001, about 500 Dutch breeders and propagators of agricultural and horticultural seeds have united in "Plantum NL." The association is active on a national, European and global level both directly and through umbrella organizations. International organizations include ESA and International Seed Federation (ISF). The members of "Plantum NL" represent about Euro 1.6 billion of sales annually. Together with its members, Plantum NL organizes and supports courses and projects in countries seeking to introduce plant variety protection, such as China and the Ukraine. The internet website of "Plantum NL" is: http://www.plantum.nl

The Dutch plant breeding and propagation sector invests about 14 percent of their turn-over in research and development. A part of this research is reportedly endangered because the Dutch Government terminated a tax reduction for conventional plant breeding experiments. This regulation provided the sector annually with a benefit of about Euro 10 million. The tax break will stay in place for plant breeding experiments in which genetic modification is applied. The planting seed sector believes that this measure will negatively affect the development of new breeds, such as breeds with enhanced resistance and improved shelf life.

In emerging markets, the Dutch Ministry of Agriculture gives special attention to the promotion of Dutch agri-food expertise and technology. At the moment, four "expertise centers" are operational, including a horticultural demonstration center in China. The Sino Dutch Horticultural Training and Demonstration Centre (SIDHOC) has the goal of promoting Dutch expertise in the production of vegetables and ornamental plants and flowers.

Table 1: Land Use by Arable Agriculture, Greenhouses and Bulbs in The Netherlands (hectares)

Arable Crops	1998	1999	2000	2001	2002
Silage Maize	219,900	230,700	232,800	238,800	244,800
Table Potatoes	124,300	127,300	129,200	115,300	116,200
Sugar Beets	113,000	119,700	111,000	109,100	108,900
Wheat	139,300	102,800	136,700	124,700	135,800
Barley	39,700	58,300	47,200	66,800	56,900
Industrial Potatoes	57,000	52,500	51,000	48,600	49,000
Grass Seed	28,400	21,300	22,000	19,700	17,900
Spring-sown Onions	13,200	14,000	14,000	14,200	14,900
Fibre Flax	3,500	3,800	4,400	4,800	4,100
Rye	6,300	2,700	6,000	3,600	3,600
Oats	2,100	2,500	2,400	2,600	2,500
Brown Beans	2,000	1,900	1,100	1,500	1,600
Peas	4,600	6,085	5,900	5,500	6,300
Rapeseed	900	1,300	850	700	500
Total	810,100	802,200	806,200	797,500	824,100
Greenhouses	**1998**	**1999**	**2000**	**2001**	**2002**
Tomatoes	1,307	1,178	1,134	1,224	1,227
Cucumbers	710	710	663	660	658
Peppers	1,010	1,119	1,155	1,194	1,235
Rose	931	950	932	921	907 755

Chrysanthemum	757	813	774	753	
Freesia	241	232	221	215	199
Lily	238	249	276	271	271
Gerbera	219	235	253	256	253
Orchid	206	201	212	194	222
Carnation	119	109	86	67	57
Alstroemeria	117	124	119	120	107
Anthurium	83	85	90	90	86
Other cut flowers	730	758	764	613	614
Border and Pot Plants	1,635	1,740	1,758	1,779	1,763
Propagation Stock for Nurseries	235	218	196	209	190
Trees	325	316	369	376	390
Total	10,344	10,561	10,526	10,524	10,538
Flower bulbs	**1998**	**1999**	**2000**	**2001**	**2002**
Hyacinths	1,184	1,158	1,130	1,171	1,189
Tulips	10,050	10,099	9,705	10,049	10,559
Daffodils	1,589	1,769	1,843	1,879	2,019
Gladioli	1,903	2,027	1,643	1,454	1,514
Crocuses	602	675	628	627	676
Lilies	3,831	4,503	5,069	4,952	5,066
rises	664	724	675	619	648
Other	1,531	1,761	1,850	1,865	2,547
Total	21,355	22,714	22,543	22,618	24,221

Planting Seed Production

Innovative planting seed production is hampered by the Dutch government's restrictive measures on crop trials with GMOs. An even more serious constraint is the strict legislation on the use of pesticides. As from July 2003, the EC prohibited 320 pesticides for agricultural purposes. An additional 110 pesticides are to be withdrawn from the market by December

2003. The Dutch Farmers Association (LTO) and Plantum NL reportedly urged a more efficient EU approval procedure for the use of new pesticides in order to maintain sufficient crop protection options.

Another important issue for the sector is CAP reform. The EU decided that decoupling of support to grass seeds producers will be voluntary. In general, the Dutch sector is willing to decouple because production linked support could lead to over production. However, if other EU member states decide not to decouple, their grass seed producers would have a competitive advantage versus Dutch grass seeds producers. The sector anticipates that the main grass seeds producing countries, Denmark, Germany, Belgium and France will decide to decouple.

Plant and Seed Health and Certification

The Dutch General Inspection Service for agricultural seeds and seed potatoes (NAK) and its subsidiary NAK AGRO are the inspection and analysis institutes for the agricultural sector. NAK is responsible for the quality inspection of Dutch propagating material. NAK AGRO carries out inspection and analysis throughout the entire agricultural sector. The NAK is also authorized to formulate certain statutory rules and quality requirements for the industry by means of binding regulations. This responsibility will, however, be taken over by the Ministry of Agriculture as part of the new Dutch Planting Seed and Propagation Material Law which is expected to be implemented by the end of 2004. The Plant Protection Service (PD) is responsible for inspection of crops and seed imports into The Netherlands.

The NAK issues a NAK Accredited Laboratory (NAL) certificate for laboratories that have installed a quality assurance system for analyzing propagation materials. At the moment, eight Dutch seed companies have acquired the NAL certificate.

In 1999, NAK AGRO initiated the program "Quality Arable Crops Project " (KPA), in cooperation with the Dutch Farmers Organization, LTO. As from 2003, the KPA program will be replaced by a certificate of the Main Board of Arable Crops, which complies with the requirements of the GMP+ quality assurance system for animal feed and the Agrifirm HACCP code for grains and is based on HACCP principles.

Intellectual Property Rights, Variety Approval, Tariffs and Export Subsidies

In the European Union, the Community Plant Variety Office (CPVO) protects plant varieties. The holder of the plant variety protection receives the exclusive right to propagate and trade this variety. Other parties may receive this right on approval of the holder.

In The Netherlands, the production and trade of plant propagation material is regulated by the Dutch Planting Seed and Propagation Material Law (Zaaizaad- en Plantgoedwet). This law is partly based on EU directives and legislation. Both the Dutch Government and the seed sector believe that this law lacks transparency. In May 2001, the Dutch Ministry of Agriculture proposed several amendments to simplify the legislation. In February 2003, the Cabinet agreed upon the new Dutch Planting Seed and Propagation Material Law. With the new law, intellectual property rights, inspections and other compulsory procedures will be better harmonized with international legislation. As part of the new Dutch Planting Seed and Propagation Material Law, one authority will be responsible for the request for commercialization of propagation material, the Council for Plant Varieties (Raad voor Plantenrassen). It is expected that the new law will be implemented by the end of 2004.

Genetically Modified Organisms and Biotechnology

There are reportedly no sales of genetically modified seeds for food or feed crops in The Netherlands. Even experimental planting of biotech crops is almost impossible in The Netherlands. Crop trials are effectively prevented by unreasonable restrictions imposed by

the Dutch government and by the threat of protests from environmental groups. Apart from the limits on biotech crops themselves, conventional U.S. planting seed exports to the EU are also impeded by fears of possible GMO co-mingling in shipments of non-biotech seed.

Research by the life sciences sector in The Netherlands is significantly behind that in the United States and certain European countries. During 2000-2005, the government will support biotech research with the following funding initiatives: Euro 25 million for biotechnological research on functioning of the genome (genomics); Euro 9 million for biomolecular informatics; Euro 7 million for pharmacology; Euro 18 million for agriculture; and Euro 45 million for biotech research conducted by start-up companies.

Most of the research is restricted to applications in the field of pharmacy. The use of biotechnology for agriculture is restricted to animal and plant health, water and air treatment, and the use of enzymes in food production. The use of genetic modification is limited, especially in the field of agriculture.

The Dutch government has issued over 30 licenses for field trials of biotech crops. There have been, however, only two licenses used, both for field experiments with GM potatoes. Plant Research International (PRI), an institute part of the Wageningen University and Research Centre is conducting one of these experiments. After this field experiment was recently destroyed by environmental activists, PRI re-started the experiment.

An extensive overview of the Dutch biotechnology sector is given at: http://www.hollandbiotechnology.nl/ For an overview of GM varieties which are approved for field experiments or market introduction see the site: http://194.229.134.119/ggo/inhoud.html

On July 23 2003, the European Council of Ministers agreed upon legislation for tracing and labeling of GMOs. The decision on rules for seed purity by the Seeds Directive was, however, delayed in October 2003. The European Seed Association (ESA) and Plantum NL are reportedly upset by the delay. The ESA argues that small and medium sized businesses will be vulnerable to legal claims based on transitional regulations over accidental presences of GM material in conventional seeds. Because threshold levels are put in place by the individual member states, U.S. seeds exports to the EU are seriously hampered.

The proposals for the Seeds Directive requests a 0.3 percent threshold for rapeseed, 0.5 percent for corn and 0.7 percent for soybeans. Some EU member states have requested more stringent thresholds. Plantum NL believes that a threshold level of 0.9 percent is feasible for planting seeds. The ESA believes that thresholds lower than the proposals are unworkable.

Trade

Table 2: Planting Seed Production Quantity in Metric Tons

	1996	1997	1998	1999	2000	2001*	2002*	2003#
Grains	29,284	28,131	24,124	26,194	28,768	28,873	27,258	27,000
Pulses	907	624	416	179	551	431	803	700
Flax	4,302	3,093	2,403	2,492	4,152	3,373	3,967	4,500
Forages	381	1,261	1,879	1,624	1,453	1,980	#2,000	2,000
Grasses	30,955	34,735	39,734	32,588	32,304	30,227	28,725	32,000
Vegetables (hectares)	1,204	1,005	766	1,044	795	874	886	1,012
Other	1,081	1,023	1,587	257	179	61	#75	100
Total ✦	66,910	68,867	70,143	63,334	67,407	64,945	62,828	66,300

*Updated #OAA's forecast ✦Vegetable seeds excluded Sources: NAK

Table 3: Dutch Imports of Seeds
Volume (Metric Tons) Value (Million Euros)

	99/00		00/01		01/02		02/03	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Grains	68,493	52.2	62,615	45.4	45,447	58.0	58,972	56.3
Flax	936	0.5	884	0.5	684	0.5	546	0.4
Grasses	24,039	25.4	20,696	25.9	22,179	26.6	25,798	24.1
Forages	427,287	59.3	309,968	50.6	94,067	22.0	41,241	11.2
Vegetables	13,155	170.2	13,414	181.5	12,804	175.0	17,798	174.6
Vegetable Pulses	22,149	28.6	15,699	17.2	28,124	25.0	48,798	32.3
Flowers & Trees	1,399	49.0	1,172	53.5	1,082	50.5	1,031	50.6
Other	3,369	34.9	2,813	25.0	6,197	14.6	25,077	20.2
Total Import	560,827	420.1	427,261	399.6	209,900	371.8	219,261	369.7

Table 4: Dutch Imports of US Seeds in Million Euros

	99/00	00/01	01/02	02/03
Grains	9.2	3.4	2.2	0.9
Flax	-	-	-	-
Grasses	6.3	8.2	8.1	7.5
Forages	1.3	0.7	0.7	0.7
Vegetables	28.9	31.1	33.0	31.8
Vegetable Pulses	9.5	10.5	8.6	7.5
Flowers & Trees	5.6	7.1	6.8	8.6
Other	3.8	3.7	0.6	1.6
Total Import	64.6	68.6	60.0	58.6

Table 5: Dutch Exports of Seeds
Volume (Metric Tons) Value (Million Euros)

	99/00		00/01		01/02		02/03	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Grains	27,002	45.8	30,069	54.9	30,259	67.3	35,202	55.5
Flax	3,442	4.1	3,355	5.0	3,660	5.6	3,363	5.0
Grasses	50,930	59.0	48,425	55.8	56,900	59.3	47,286	57.3
Forages	155,310	34.6	125,642	37.2	53,993	45.3	32,196	42.0
Vegetables	9,375	498.3	9,324	537.3	10,583	568.7	14,219	658.1
Vegetable Pulses	20,036	52.6	19,206	46.3	23,251	35.3	26,664	46.2
Flowers & Trees	1,853	61.7	1,109	63.5	1,536	57.7	1,692	63.8
Other	1,835	38.6	8,761	29.5	19,014	29.4	5,137	33.5
Total Export	269,783	794.7	245,891	829.5	199,821	867.5	165,759	961.4

Source Table 3 and 4: Central Bureau of Statistics (CBS).

Dutch exports of planting seeds reached Euro 961 million in 2002/2003 up from Euro 868 million in 2001/2002. This growth is mainly attributable to a strong increase in vegetable seeds exports, worth Euro 658 million in 2002/2003. However, the largest growth in export of propagation material is reportedly due to the increased export of young plants raised from cuttings and seeds.

According to BICO statistics, Dutch imports of U.S. planting seeds increased from US$ 31 million in 2001/2002 to US$ 34 million in 2002/2003. This increase is mainly due to higher imports of US fruit seeds, flower seeds and in particular grass and clover seeds. The import value of US planting seeds is, however still below the pre-2000 level. This decline is attributable to the drop in imports of maize seeds from the U.S. as a consequence of restrictions on GM varieties. The largest share of remaining U.S. exports consists of vegetable seeds, with a value of about US$ 14 million during the past two seasons.

Grain and Forage Planting Seeds

Domestic production: The acreage for grain seed production declined slightly from 5,300 hectares to 5,100 hectares in 2003. The decline is attributable to reduction in areas dedicated to production of summer wheat, and partly offset by an increase in the acreage planted for summer barley seed production.

International Trade: Dutch grain seed imports declined slightly from Euro 58 million in 2001/2002 to Euro 56.3 million in 2002/2003. Grain seed imports mainly consists of corn hybrid seeds worth Euro 50.5 million in 2002/2003. During 2002/2003, Dutch grain seed exports declined nearly Euro 12 million to Euro 55.5 million. In particular, exports of hybrid corn seed declined while soft wheat seed imports more than doubled. Fluctuations in the Dutch trade of hybrid corn seed are mainly driven by transshipments and changing demand in other EU countries. In The Netherlands, there is no production of hybrid corn seeds and demand is reportedly stable.

Grass Planting Seeds

Domestic Production: Important producers of grass seeds in The Netherlands are: Cebeco Seeds, Barenbrug and Advanta. The 2003 acreage for grass seed production increased by 20 percent to 21,815 hectares, mainly due to increasing prices and better weather conditions during sowing. Sector sources believe that the total acreage for grass seed production could grow to 25,000 hectares.

The acreage and production of English Rye Grass seed recovered from low production in 2002. Last year, English Rye Grass seed production was negatively affected by wet conditions during sowing in the autumn of 2001. The sector expects that, as a result of better prices, the acreage of English Rye Grass will increase in 2004, possibly leading to a reduction in prices. In contrast to prices for English Rye Grass, prices for Red Fescue remained at low levels due to oversupply; mainly due to increased production in Denmark and Canada. As a result of the lower prices, the acreage of Red Fescue declined in 2003. Oversupply and large stocks reportedly also tempered prices for Kentucky Blue Grass. In The Netherlands, the acreage of Kentucky Blue Grass declined due to restrictions on the pesticide use. In 2003, the yields of the majority of the grass seeds were reportedly good, Red fescue about 1.65 MT per hectare, Kentucky Blue grass about 1.40 MT per hectare, and for English Rye Grass about 2.00 MT per hectare.

As a result of the stringent fertilizer regulations, the use of clover seeds is increasing in The Netherlands. Clover is capable of fixing nitrogen from the air. About a third of the Dutch pastures are sown with a grass / clover mixture.

International Trade: During 2002/2003, Dutch imports of grass seeds increased due to a shortage of English Rye Grass. During this season, the U.S. was the main supplier of English Rye Grass to The Netherlands. As in 2000/2001, U.S. Kentucky Blue Grass seed exports to The Netherlands also increased. The Dutch-based Cebeco Seeds Group reportedly moved a part of their grass seed production (principally Kentucky Blue Grass) to the U.S., and began

exporting seed to The Netherlands. This move was a result of restrictions on several pesticides essential for production of this seed variety. Traditionally, U.S. exports of grass seeds to The Netherlands consist mainly of high quality Blue Grass, used for golf courses and athletic fields. About fifty percent of EU demand (90,000 MT) is for use on sports fields, lawns and golf courses.

Vegetable Planting Seeds

Domestic Production: Important producers of vegetable planting seeds in The Netherlands are: EMZA, Rijk Zwaan, Seminis, Syngenta and Numza. Most of the vegetable seed production of these Dutch companies (reportedly 95 percent) is produced outside The Netherlands. Vegetable seeds produced in The Netherlands mainly consist of seeds used for seed production, and expensive seeds such as tomato, pepper and lettuce seeds. More restrictions on the use of pesticides could lead to further contracting-out of seed production to Dutch or foreign companies located outside The Netherlands. Most of the vegetable seed production in The Netherlands, however, is conducted in greenhouses in which pests can be well controlled with minimal amounts of pesticides. Seed production conducted in the field, such as for pulses, is more dependent on pesticides. During the past four seasons, Dutch acreage planted to vegetable seeds increased from 795 hectares in 2000, to 1,012 hectares in 2003. Yearly fluctuations in vegetable seed production are mainly due to changes in the demand and stock.

International Trade: The Netherlands is an important trader, processor and packager of vegetable seeds. Vegetable seeds amount to nearly 50 percent of the total import value and nearly 70 percent of the total export value of the Dutch planting seeds trade. Important seeds for the trade include, peppers, tomato, onion, cabbage and carrots. The main destinations are Spain, Italy, Germany and France. The U.S. is the largest exporter of vegetable seeds to The Netherlands just ahead of France. The export value of U.S. vegetable seeds remained stable at about Euro 30 million during the last three years.

Flower and Tree Planting Seeds

Dutch imports and exports of flower and tree seeds remained relatively stable during the past four seasons. Dutch imports generally fluctuate around Euro 50 million, Dutch exports around Euro 60 million. Main third country sources of Dutch flower seed imports are Brazil and the U.S.

Trade Matrices

IMPORTS 2002/03

	July/June 2002/03	
	Quantity	Value
GRASSES	x 1,000 MT	x 1,000 Euro
Meadow fescue (120923110)		
Total	709	655
E.U.	259	253
Czech Rep.	323	276
Canada	75	79
U.S.A.	0	0
Red Fescue (Creeping fescue) (120923150)		
Total	4,507	2,452
E.U.	3,694	1,648
Czech.Rep.	106	101
U.S.A.	405	734
Canada	37	1,160
Other fescue (120923800)		
Total	676	794
E.U.	377	399
Czech.Rep.	24	20
U.S.A.	103	170
Blue Grass (common meadow grass) (120924000)		
Total	2,821	6,232
E.U.	1,251	2,201
U.S.A.	1,533	3,964
		0
Meadow Barley Grass (120925100+120925900)		
Total	12,087	9,894
E.U.	8,304	6,483
Hungary	546	332
Czech.Rep.	825	497
U.S.A.	1,300	1,633
Timothy (120926000)		
Total	1,972	1,943
E.U.	307	286
U.S.A.	128	173
Canada	1,447	1,394
Other (raw meadow grass, cocksfoot) (120929100)		
Total	3,026	2,128
E.U.	650	573
Turkey	635	163
Ukraine	211	57
U.S.A.	222	787
New Zealand	25	98

Australia	746	188
SUGARBEET SEED		
(120911000)		
Total	19,915	4,430
E.U.	19,913	4,421
U.S.A.	0	0
FORAGES		
Alfalfa (120921000)		
Total	303	601
E.U.	41	99
U.S.A.	3	11
Canada		
Clover (120922100+120922800)		
Total	934	1,789
E.U.	301	595
U.S.A.	29	103
N.Zealand	371	884
Lupineseed (120929500)		
Total	38,399	6,983
E.U.	8,220	1,503
Poland	24	3
Australia	30,155	5,477
Other forages (120929800)		
Total	1,605	1,842
E.U.	1,101	907
Poland	57	66
Hungary	72	57
U.S.A.	169	541
Canada	53	103
Australia	0	1
New Zealand	84	108
FLOWER SEEDS		
Plant seeds for flowers (120930000)		
Total	340	21,432
E.U.	66	10,402
Hungary	16	264
Tanzania	58	94
U.S.A.	30	5,965
VEGETABLE SEEDS		
(120991100-900)		
Total	17,259	170,047
E.U.	4,778	35,287
China	1,387	5,765
U.S.A.	1,136	27,556

TREE SEEDS		
(120999100)		
Total	439	4,438
E.U.	72	1,215
U.S.A.	50	858
Brazil	91	551
Mexico	57	440
OTHER FLOWER SEEDS		
(120999910)		
Total	252	24,744
E.U.	16	67
U.S.A.	3	1,764
OTHER SEEDS		
(120999990)		
Total	1,012	11,300
E.U,	549	2,927
U.S.A.	63	1,581
VEGETABLE SEEDS-HYBRIDS		
(071290110)		
Total	539	4,528
E.U.	4	31
U.S.A.	2,541	4,263
Australia	0	0
LEGUMINOUS VEGETABLES		
"Kekers" (071320000)		
Total	1,857	1,072
E.U.	781	424
Turkey	853	510
U.S.A.	43	25
Bean (071332000)		
Total	261	213
E.U.	105	94
Others (071339000)		
Total	2,916	2,126
E.U.	240	392
U.S.A.	81	65
Turkey	43	43
China	1,402	865
Canada	127	70
Broad bean (071350000)		
Total	661	226
E.U.	611	191

Beans Vigna Mungo (071331000)		
Total	7,774	5,225
E.U.	61	156
Tanzania	0	0
U.S.A.	117	117
China	6,691	4,190
Australia	0	0
Beans Phaseolus Vulgaris (071333100)		
Total	11,567	14,223
E.U.	249	725
Tanzania	5,379	4,412
U.S.A.	3,850	6,114
Chile	1,521	2,317
Peas (071310100)		
Total	9,067	3,891
E.U.	5,300	1,926
U.S.A.	934	717
Hungary	2,650	1,122
Lentils (071340000)		
Total	14,695	5,340
E.U.	8,456	2,384
Turkey	1,531	914
U.S.A.	439	215
Canada	3,873	1,707
FIELD CROPS		
Soybeans Seeds (120100100)		
Total	46	27
E.U.	42	18
Groundnuts Seeds (120120100)		
Total	0	0
Rape Seed (120500100)		
Total	0	0
Flax Seed (120400100)		
Total	546	392
E.U.	546	392
Sunflower Seed (120600100)		
Total	1,077	1,058
E.U.	10	78
Turkey	984	345
U.S.A.	0	25
Sesame Seed (120740100)		
Total	0	0

Palm Kernel Seed (120710100)		
Total	58	452
Mustardseed (120750100)		
Total	1,860	1,465
E.U.	455	635
Hungary	299	163
Poppy Seed (120791100)		
Total	0	0
Other (120799100)		
Total	1,109	1,455
E.U.	910	1,282
Hungary	102	61
Czech.Rep	92	61
Corn hybrids, seed (100510110)		
Total	124	297
E.U.	124	297
Corn hybrids, seed (100510130)		
Total	8,270	19,481
E.U.	5,316	14,901
Hungary	1,173	1,474
U.S.A.	23	251
Canada	1,437	2,432
Corn hybrids, seed (100510150)		
Total	14,565	30,484
E.U.	8,201	20,666
U.S.A.	208	447
Chile	2,467	4,369
Corn hybrids, seed (100510190)		
Total	16	183
E.U.	11	88
Corn Seed (100510900)		
Total	1,517	1,259
E.U.	1,353	723
Sth Africa	5	32
Chile	102	228
U.S.A.	32	186
Soft Wheat (100190910)		
Total	27,260	3,378
E.U.	27,259	3,334
Barley (100300100)		

Total	7,220	1,244
E.U.	7,218	1,242

EXPORTS 2002/03

	July/June 2002/03	
	Quantity	Value
GRASSES	x 1,000 MT	x 1,000 Euro
Meadow fescue (120923110)		
Total	556	772
E.U.	364	464
Red Fescue (Creeping fescue) (120923150)		
Total	5,138	6,649
E.U.	4,402	5,636
Other fescue (120923800)		
Total	2,516	3,316
E.U.	2,199	2,889
Blue grass (common meadow grass) (120924000)		
Total	3,141	8,206
E.U.	2,635	6,948
Meadow barley grass (120925100 + 900)		
Total	31,846	34,189
E.U.	20,744	20,823
Timothy (120926000)		
Total	808	1,160
E.U.	735	1,070
Other (raw meadow grass, cocksfoot) (120929100)		
Total	3,281	3,028
E.U.	3,038	2,518
SUGARBEET SEED		
(120911000)		
Total	7	202
E.U.	4	197
FORAGES		
Alfalfa (120921000)		
Total	985	875
E.U.	812	449
Clover (120922100 + 800)		
Total	967	2,863
E.U.	839	2,528
Lupine Seed (120929500)		

Total	9,168	930
E.U.	4,748	866
Other forages (120929800)		
Total	21,076	37,346
E.U.	15,148	27,563
FLOWER SEEDS		
Plant seeds for flowers (120930000)		
Total	776	56,259
E.U.	230	29,591
VEGETABLE SEEDS		
(120991100-900)		
Total	13,576	650,340
E.U.	7,970	404,638
TREE SEEDS		
(120999100)		
Total	821	1,487
E.U.	37	176
OTHER FLOWER SEEDS		
(120999910)		
Total	95	6,043
E.U.	54	874
OTHER		
(120999990)		
Total	1,979	29,556
E.U,	984	13,086
VEGETABLE SEEDS-HYBRIDS		
(071290110)		
Total	643	7,720
E.U.	130	1,704
US	0	0
LEGUMINOUS VEGETABLES		
"Kekers" (071320000)		
Total	417	350
E.U.	368	304
Bean (071332000)		
Total	205	190
E.U.	196	179
Others (071339000)		
Total	1,708	2,170
E.U.	1,219	1,836
USA	0	0

Broad Bean (071350000)		
Total	1,077	2,274
E.U.	1,005	2,189
Beans Vigna Mungo (071331000)		
Total	336	342
E.U.	140	153
Beans Phaseolus Vulgaris (071333100)		
Total	11,851	29,730
E.U.	8,384	30,008
Peas (071310100)		
Total	6,596	8,067
E.U.	5,064	6,605
Lentils (071340000)		
Total	4,474	3,104
E.U.	3,679	2,546

FIELD CROPS

Soybeans Seeds (120100100)		
Total	2	1
E.U.	0	0
Groundnuts Seeds (120120100)		
Total	19	9
E.U.	6	0
Rape Seed (120500100)		
Total	0	0
Flax Seed (120400100)		
Total	3,363	4,996
E.U.	3,069	4,624
Sunflower Seed (120600100)		
Total	456	1,574
E.U.	238	1,000
Sesame Seed (120740100)		
Total	0	0
Palm Kernel Seed (120710100)		
Total	36	119
Mustardseed (120750100)		
Total	1,318	1,877
E.U.	1,286	1,836

Poppy Seed (120791100)		
Total	1,210	6
E.U.	1,210	6
Other (120799100)		
Total	112	174
E.U.	66	161
Corn Hybrids, Seed (100510110)		
Total	1	13
E.U.	0	0
Corn Hybrids, Seed (100510130)		
Total	5,960	16,257
E.U.	5,960	16,257
Corn Hybrids, Seed (100510150)		
Total	14,617	32,846
E.U.	14,150	32,694
Corn Hybrids, Seed (100510190)		
Total	935	1,853
E.U.	1	34
Corn Seed (100510900)		
Total	1,489	2,355
E.U.	1,465	2,244
Soft Wheat (100190910)		
Total	11,218	1,797
E.U.	11,186	1,779
Barley (100300100)		
Total	982	342
E.U.	958	332