



#GrowingTheFuture

Policies and regulations for plant breeding innovation

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GCIRC, Cambridge 09 April, 2025

Who we are?

30+

National member associations from EU Member States and beyond, which in turn represent many thousand seed businesses across Europe.

70+

Direct company members from family businesses to multi-nationals, including seed related industries.

Euroseeds has members also in other parts of the world: e.g. **Morocco, South Africa, USA, Canada...**



Mission:

Euroseeds' mission is to engage, on behalf of its members, with all relevant European decision makers in order to represent their interests and to contribute to a:

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

The EU Seed Sector – Facts & Figures

EMPLOYMENT:
approx.

52.000

**ANNUAL R&D
SPENDING:**

up to: **20%**

(of the companies'
turnover)

**R&D
STATIONS:**

750

Seeding value in the EU

@Eurostat @FoodDrinkEurope

€15* Billion
(Approximately)

commercial seed market value

51 000 Different
varieties

of agricultural and vegetable species
are available to EU farmers **today***

€220 Billion
(Approximately)

crop output value in the EU

4 000 New
varieties

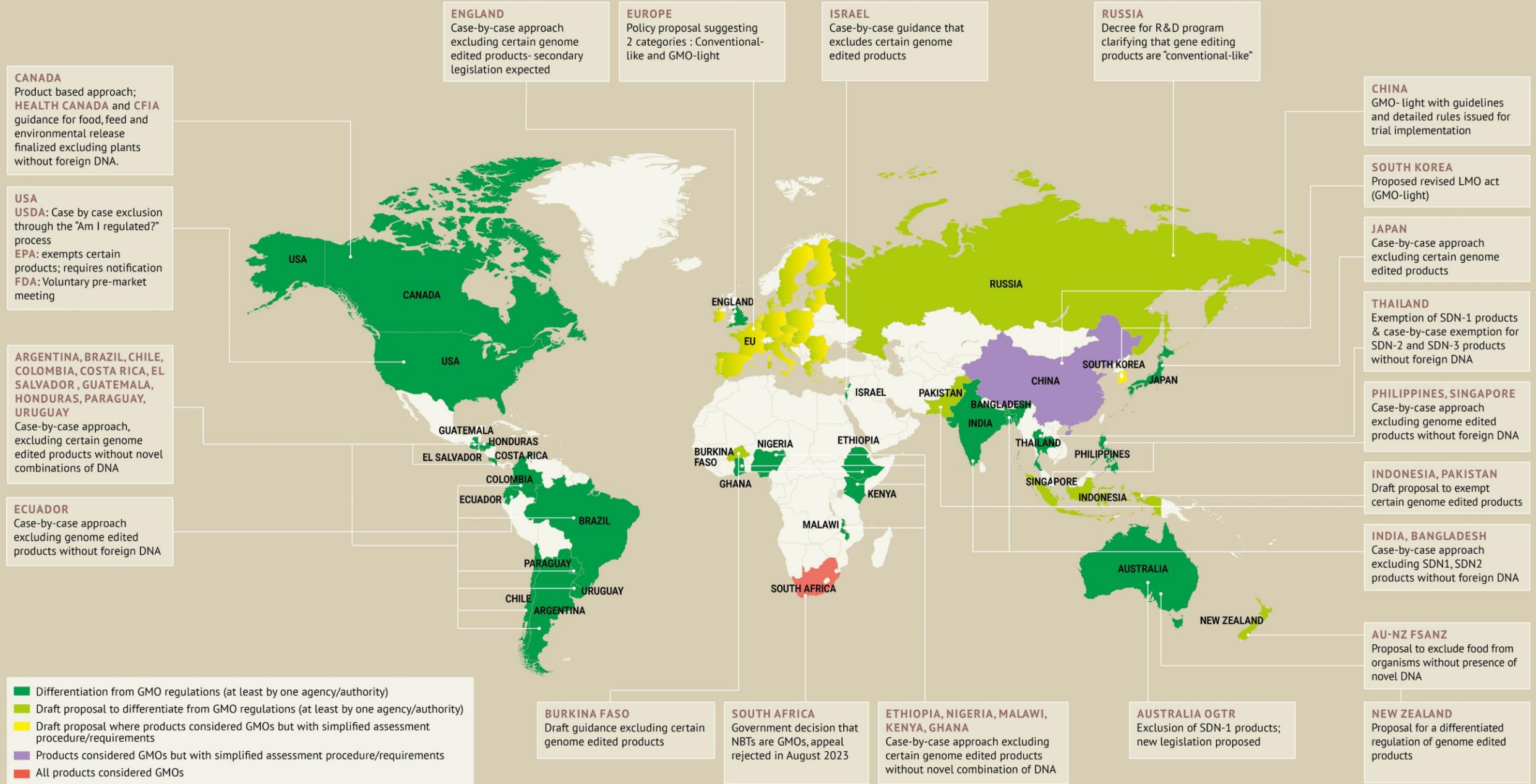
of agricultural and vegetable species
come to the eu market **every year***

€1.118 Billion

in the EU food supply chain value

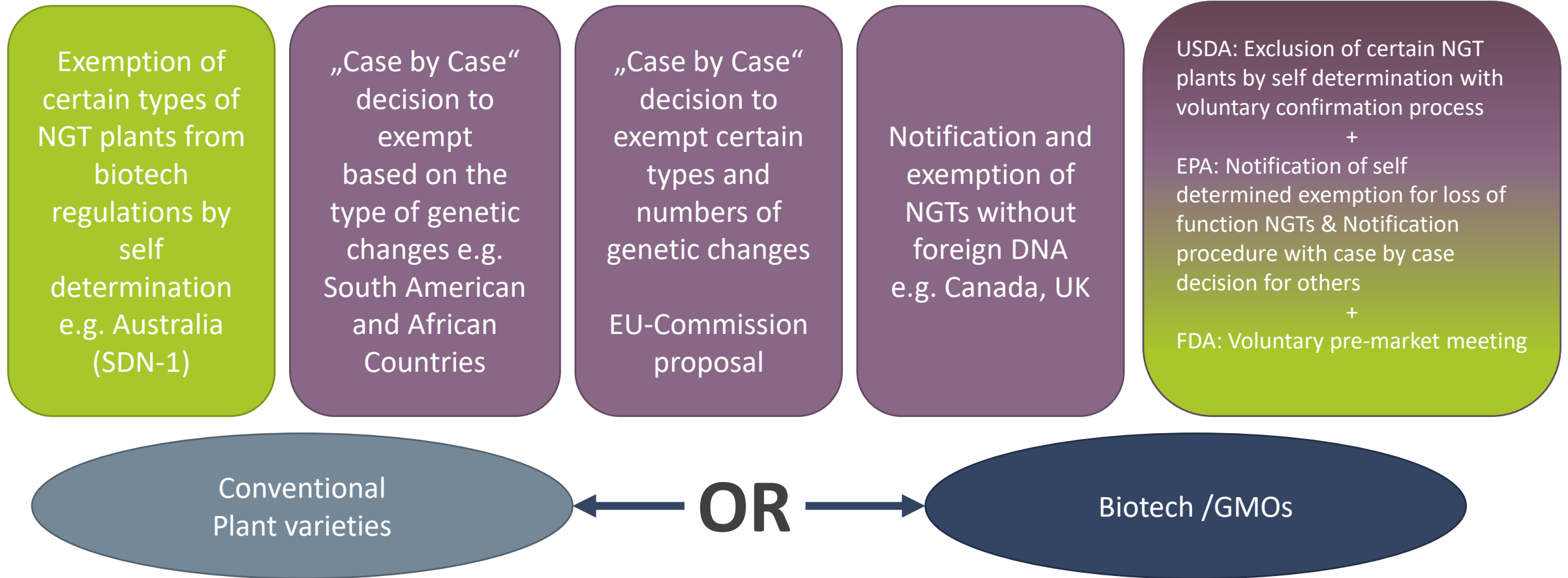
**Source: OECD (2018), Concentration in Seed Markets: Potential Effects and Policy Responses, OECD Publishing, Paris.*

Policy developments around the world 02/2025



Different approaches to exempt from Biotech regulations are based on a Common Principle

“Plant varieties developed using the latest breeding methods should not be subject to biotech regulations if they could have been produced through earlier breeding methods or might also have been obtained from natural processes without human intervention.”



The EC NGT-Proposal

NGT- Verification Procedure

Conventional

cross-breeding, including by using advanced techniques such as embryo rescue, induced polyploidy and bridge crosses

GMO techniques listed under Annex IB of 2001/18
Mutagenesis
Protoplast fusion (cells from crossable species)

No risk assessment

No labelling

No detection method

Allowed for organic farming

NGT Category 1 (conventional-like)

equivalent to conventional plants if equivalence criteria are met
max 20 genetic changes of specific types

No risk assessment

Seed bag NGT labelling + NGT info public register

No detection method

Not allowed for organic farming

GMO

NGT Category 2

Adapted GMO risk assessment (incl. accelerated RA & SME support for „beneficial traits“)

GMO labelling (+ trait) + Public GMO register

(adapted) detection method

No Opt out by MS

Not allowed for organic farming

Transgenic plants

Full GMO risk assessment

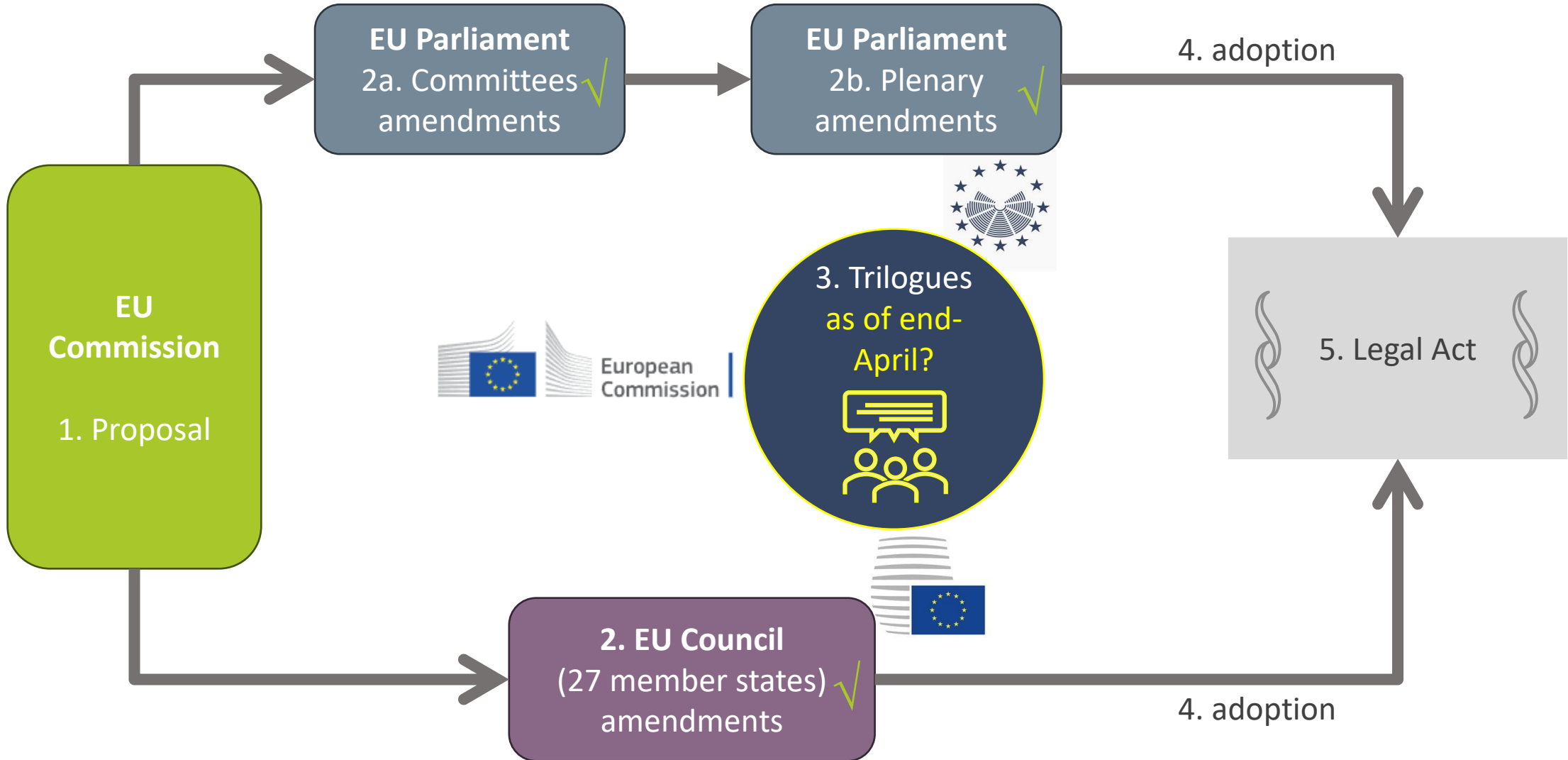
GMO labelling + Public GMO register

detection method

Opt out by MS

Listing in National and EU Variety Catalogue (see also Commission proposal for Plant Reproductive Material –PRM)

Where are we in the ordinary EU legislative procedure (simplified?)



Important Elements of the Council proposal

- IP:
 - Declaration of any type of patent protection (to the best of the applicant's knowledge)
 - Voluntary declaration of willingness to licence
 - Commission guidelines for the purpose of assisting operators, in particular breeders, in navigating the plant intellectual property landscape
 - (The EU Parliament asks for a complete ban on patents)
- No traceability and labelling for Category I NGTs (contrary to Parliament amendment)
- No GMO-like monitoring for Category I NGTs (contrary to Parliament amendment)
- Improved Annex I (equivalence criteria) for the verification of Category I NGTs
- HT plants & products cannot be Category I
- Clarification of Commission competence for delegated acts related to updating equivalence criteria (future proofing)

Precision Breeding Act – England (only)



A Stepwise Approach

England only

Precision Breeding Act (2023)

<https://www.legislation.gov.uk/ukpga/2023/6/contents/enacted>

- Provides a regulatory framework (enabling transparency & oversight)
- Covers plants and animals for R&D and marketing purposes
- Defra and FSA provisions (implemented in the Regulations)

Precision Breeding Regulations <https://www.legislation.gov.uk/ukdsi/2025/9780348269123>

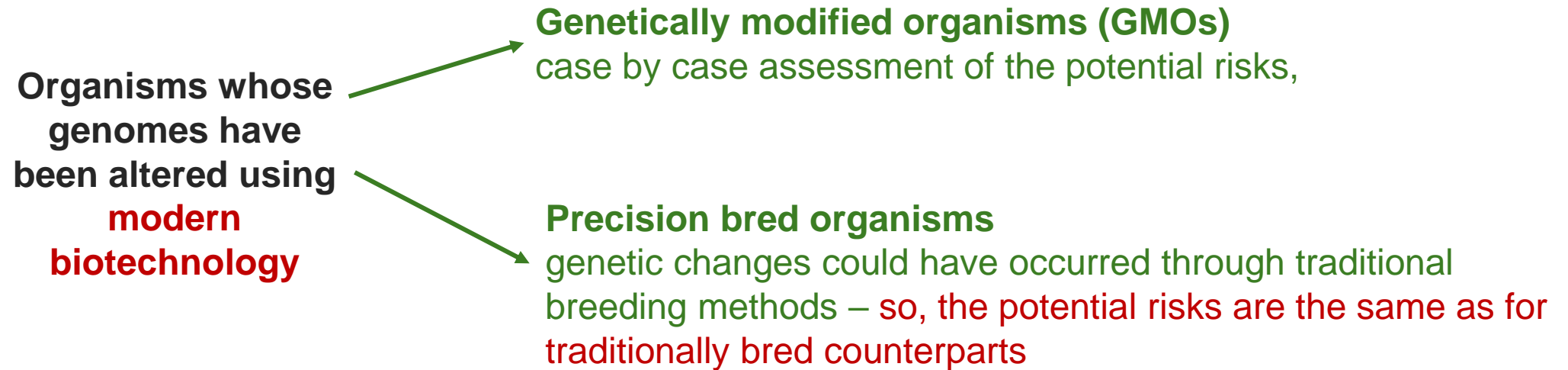
Laid 25th February 2025

- Plants only
- Comes into force 6 months if/when passed by Parliament

Supporting guidance: <https://www.gov.uk/government/publications/acre-draft-guidance-on-release-and-marketing-of-precision-bred-organisms>

The Precision Breeding Legislation

Together, the Act and Regulations remove precision bred plants from requirements that apply to GMOs (and to GM food/ feed). They replace them with requirements more proportionate to risk and that provide transparency.



The legislation introduces:

- Two processes for notifying precision bred plants
- A public register
- Revocation and Enforcement measures

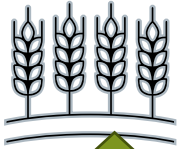
Exception: precision bred plants will be treated as GMOs in organic production.

Precision Breeding Legislation – Next Steps

- 2 April: debate and vote of the House of Commons Second Delegated Legislation Committee on the draft Genetic Technology (Precision Breeding) Regulations 2025 went smoothly
- House of Lords: date for the debate is still awaited -almost certain to be after the Easter recess (21 April).
- The legislation is due to come into force six months after approval by both Houses of Parliament (likely late-October 2025 at the earliest)

Regulatory Policies can create Hurdles that discourage New Investment

Conventional



Identical
Disease
Resistant
Wheat
Varieties



Consultation
Timing



Data
Requirements



Post market
Requirements



Trade
Limitations



Marketplace

Hurdles disproportionately affect business investment to create solutions for a diversity of crops and markets



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