

Seeds thrive in a risky environment

February 2026

WORKING METHOD



Ten years after the publication of study “Seeds: A French Gem, A Concentrate of Values” by AgriDées in December 2015, we have produced this new report based on a survey of the seed supply chain in France, (breeders, seed producers, distributors, farmers multiplying seeds, the French Seed Growers’ Union - UFS - and its European counterparts, the Interprofessional Association for Seeds and Plants - SEMAE), farmers using seeds, and farming stakeholders (associations, research institutes, interbranch organizations, professional associations, unions, companies, investors), public authorities and technology clusters. The interviews were conducted with 80 individuals from June to October 2025. This Note is also the result of collective reflections by the members of the AgriDées working group.

KEY FIGURES FOR THE FRENCH SEEDS INDUSTRY, 2024/25

Largest market in the EU (20–25%), which accounts for 15–20% of the global market.
Europe’s leading seed producer.
World’s leading exporter of field crop seeds.

Sales: €3.9 billion.
Imports: €1.7 billion.
Exports: €2.2 billion (56% of sales).
Trade balance: €1.2 billion.
Annual research budget: €450 million (13% of sales).

75 breeding companies; 274 production companies; 4,881 marketing companies.
12,000 jobs.
16,500 farmers involved in seed multiplication; 390,000 farmers using the seeds.

MAIN CHANGES OVER THE PAST DECADE

Over the past ten years, companies in the seed industry have changed in response to both economic factors and the demand dynamics within their ecosystem.

General context

- Growing importance of geopolitics and climate change, alongside international markets.
- Safeguarding purchasing power, weakened by the return of inflation.
- Rise in energy-related production costs.
- Growing importance of strategic objectives of resilience, sovereignty, and even power.

Seed companies

- Continuation of a very high level of innovation.
- Internationalization of activities (trade flows and business settlement).
- Downstream shift of actors involved in public-private partnerships in research projects: fewer breeders, more actors in the value chain.
- Use of new technologies (New Genomic Techniques, Artificial Intelligence): acceleration of genetic progress, new traits.

Farmers

- Seed multipliers: fewer in number, like other farmers, but still a lucrative occupation, becoming more professional and contributing to farm resilience.
- Seed users: emerging service crops (beyond cover crops), need to reduce chemical inputs for economic, environmental, and regulatory reasons, increasing expectations for seeds.

Value chains

- Emerging monetizable ecosystem services (such as carbon credits, payments for environmental services, etc.).
- Need for stability among manufacturers, which is not always compatible with rapid varietal renewal.
- Shrinking of non-GM segments in animal feed due to their extra cost.
- Greater involvement in public-private partnership research projects.

Citizen consumers

- Decline in purchasing power and reluctance to pay for quality products.
- Increased demand for local products

WHAT IS OUR ANALYSIS?

Within a decade, **France's seed industry has grown stronger and consolidated its position, has also become more international**, despite the closing of certain markets. France continues to attract breeders from around the world, with its dense network of players in research, development, innovation, and seed multiplication, all **firmly rooted locally**. Its **historical know-how** and **certification framework** ensuring seed quality are long-standing strengths.

The pace of innovation in seed companies shows no sign of slowing down and must continue to be supported to respond to the myriad challenges facing genetics. Many stakeholders regret the oversized range of varieties offered by distributors who, for field crop seeds, only use four purchasing centers, putting downward pressure on seed prices for breeders.

Certain **highly structured, high value-added sectors** have long been aware of the contribution of seeds to their value chain and are involved in plant breeding. This is particularly true of the durum wheat–pasta, linseed–textile fiber, fresh and industrial potatoes, malting barley–beer, and sugar beet–sugar-ethanol sectors. Today, these sectors are better able to identify **seeds as a source of solutions for more sustainable and competitive production, in line with industrial processing criteria and consumer demands**.

Alongside varieties that are resistant to emerging diseases and abiotic stress, seed companies must therefore strengthen their offering of **service plants, cover crops, and legumes**. The industry's commitment to seeds is also evident in **public-private partnerships**: downstream players are now more involved in these than they were ten years ago.

The decline in the number of seed producers and seed production areas reflects the difficulties faced by all farmers in our country. Reduced access to water and plant protection products, as well as increased energy costs, have eroded margins and reduced the competitiveness of French agriculture. **For some species (radish, spinach, red clover), it has already become virtually impossible to produce seeds on our land. In addition, the expansion of part of European corn and sunflower seed production to Ukraine has made it possible to produce seeds at very competitive prices** in this country, now available on the European market.

The challenges of **competitiveness** for French agriculture, agri-food and industrial **sovereignty**, climate change **mitigation and adaptation**, and **generating value** for all parts in the food chain (including farmers) are challenges that cannot be met without seed leverage. Seeds are more **strategic** than ever and must take advantage of **every technological** (new genomic techniques, artificial intelligence) **innovation and organizational** (public-private partnerships, ecosystems) **innovation**.

OUR RECOMMENDATIONS

For public authorities

- **Enabling breeders to accelerate plant breeding** by facilitating their access to the most modern and relevant innovations, including New Genomic Techniques (NGT) and artificial intelligence, and also to research funding (securing the level of the Research Tax Credit, extending the Contribution for Research and Variety Innovation - CRIV – beyond straw cereals, particularly to protein-rich crops).
- In a **One Health** public health perspective, encouraging stakeholders to diversify their resources and the sustainability of production, through Payments for Environmental Services (PES) in particular. ;
- **Securing agricultural production by facilitating farmers' access to essential production tools** (water, plant health products) and **decision-making tools** (digital, artificial intelligence) that integrate seed data with other crop management parameters

For seed companies

- **Communicating about their strategic role** in securing food supplies for the French population.
- **Raising their profile locally**, in the regions where they are based by getting involved in local initiatives such as regional food projects.
- **Not neglecting niche crops and orphan species** (oats, camelina, chicory, faba beans, lentils, alfalfa, peas, chickpeas, buckwheat, sorghum, etc.) to improve crop biodiversity and local supply chains.

For farmers

- **Securing seed multiplication activities** with medium-term contracts.
 - For specialty crops, **enabling farmers using seeds to organize themselves collectively** to de-risk their activities and increase their market power in the value chain.
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POINT OF CONTACT

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Founded in 1867, AgriDées is the think tank that supports farming businesses.

Recognized as a public-interest organization, independent and non-partisan, and guided by values of humanism and progress, AgriDées is a think tank dedicated to understanding and supporting the transformations taking place in the agricultural and agri-food sectors, as well as in rural areas.

A hub for reflection and collective intelligence, expertise, and foresight, AgriDées leads working groups, publishes Strategic Insight Notes, and organizes thematic meetings that place the agricultural enterprise at the heart of societal transitions and the major transformation challenges of the 21st century.

On a daily basis, AgriDées mobilizes a diverse network of stakeholders from the agricultural, agri-food, and agro-industrial sectors, as well as economic and political decision-makers, public and local government officials, educators, researchers and experts, and representatives of civil society.

Through its work, AgriDées guides and supports agricultural business leaders in building a sustainable society that creates value and is open to the future.

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