National Reports for the Baltic States:
How to improve the production and the use of organic seeds?
National recommendations for Estonia, Latvia and Lithuania

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How to improve the production and the use of organic seeds? National recommendations for Baltic States

1. Aim and organisation of the workshop

This report presents the results of the workshop held in Riga on the 31st of January 2019, under the Horizon 2020 LIVESEED project. It aims at presenting specific recommendations for the Baltics States - Estonia, Latvia and Lithuania - on how to improve the production and the use of organic seeds. This workshop gathered around 30 different stakeholders from the three Baltic States, ministries in charge of agriculture issues, seeds companies, association of organic farmers and plant breeders.

As part of LIVESEED project[1], national visits took place in the three countries from September 5th to September 11th in 2017, to better understand the bottlenecks and the possibilities of improvements regarding the production and the use of organic seeds at the national level. The main outcomes of those visits are summarized in three country reports[2] that were used as a basis for the workshop discussion in 2019.

During the first part of the workshop, different stakeholders reflected on the country reports and gave testimonials on their analyses of the situation in their countries. During the second part of the workshop, all stakeholders were invited to discuss the following issues, divided according to their countries. Guiding questions for discussions were:

- How to improve the functioning of the organic seed database?
- How to increase the production of organic seed?
- How to promote the use of organic seed?
- How to ensure that relevant stakeholders remain involved?

Based on those discussions a SWOT analysis, and policy recommendations were highlighted. The main outcomes of the discussion will be followed up by actions recorded in the Seed Declaration for Organic Seed that all stakeholders agreed to take at the end of the day (see Annex I).

2. Estonia

2.1. Reflections on the Status Quo of the Organic Sector and Organic Seed Production

The number of organic farmers has increased since 2016. Estonia has the third largest share of organic land out of total agricultural land in the EU (after Lichtenstein and Austria). Based on data from 2017, in absolute terms, 1,888 organic farmers operate in Estonia covering 20.25 % (196,000 hectares) of agricultural land area[3], including 44.8% grassland, 51.3% arable crops, 1.2% permanent crops and 2.7% other crops and fruits.
Most growth was observed in arable crops (mostly oat). Further growth of the organic sector in 2018-2019 was confirmed by the Ministry of Rural Affairs of Estonia, with the number of organic farmers expected to exceed 2,000, and the organic area to grow over 210,000 hectares.

[1] Work Package 1 'Regulation & policy framework regarding production, use and transparency of organic seed.
[2] The three country reports are available: Estonia (EN, ET), Latvia (EN, LV), Lithuania (EN, LT).
[3] https://www.ifoam-eu.org/en/organic-europe

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About 90 seed producers are operating in Estonia, out of which only a few farmers produce organic seed in Estonia. About 15 suppliers offer certified organic seed in the database for arable, forage and vegetable crops (leguminous and grassy grasses - 5 suppliers, cereals - 10 suppliers, oilseeds - 1 supplier, pulses and vegetables - 3 suppliers).

Since organic cereal production is prominent in the country, the demand is highest for organic cereal varieties which have traits and characteristics of providing especially good yield, good weed suppression and disease resistance. Varieties suited to organic management are mostly Kalle – oat; Maali, Tuuli – barley; Mooni – spring wheat; Legato – winter turnip rape; Elvi, Sangaste – winter rye. In Estonia regular trials are conducted for testing cereal varieties and breeds, oil seeds, restarted trials with field pea and beans, they are testing potato varieties and conduct trials for tomato and garden pea. These are local and national projects and mostly financed by the Ministry of Rural Affairs. There are plans in the future to implement a new breeding program for 2020-2030, paying more attention to breeding for organic, improving the funding for breeding, and improving the infrastructure and equipment.

2.2. Main Outcomes of the Group Discussions

Opportunities to improve the database were identified as the following:

- Making the national organic seed database easier to find (currently there is no separate web address for the database);
- Linking the results of the field trials conducted by the Agricultural Research Centre with the database (this would help organic producers to make better decision about their production);
- Adding information about characteristics on the varieties (this would help organic producers to make better decision about their production);
- Making the database more interactive by involving organic producers in updating the database (this would speed up the exchange of information, especially in high season, and reduce bureaucracy);
- Raising the awareness of organic producers about the database by promoting the database and explaining how the database is used in the trainings and information materials (e.g. organic farming gazette).

Main points highlighted by the participants about the production of organic seed in Estonia were:

- In general, it is rarely the case in Estonia that farmers combine organic and conventional production (less than 100 farmers). It is hard to convince seed producers to convert to organic agriculture;
- Farmers should receive more subsidies if they are also seed producers. So far, 20% higher support is dedicated to those who sow with organic seeds, but seed producers could also receive some form of subsidy for producing organic seed;
- Better quality seed should not be the only argument to buy certified organic seeds; the users of organic seed should be supported;
- It is important to organize meetings between seed producers and organic farmers. This kind of cooperation would help to bring together the supply and demand for organic seed;
- It could be useful to organize different information days, e.g. in a farm with a seed cleaning facility for famers who already produce organic seed and for farmers who are considering organic seed production, to give producers the opportunity to exchange knowledge and experience;

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- Many of the farmers have invested in their own seed cleaning equipment, because only few of them are interested in cooperation and most of them prefer to clean themselves their seeds;
- There is an upcoming pilot project of a seed cleaning centre, that is expected to provide solutions for improving the quality of organic seed, lower the prices and thereby increase the use of organic seed;
- In Estonia, there are indirect investment measures (not specifically targeting organic farmers or seed producers), where organic farmers and seed producers are in a more favourable position (they get higher scores). At the moment, farmers who are also seed producers, get higher scores if they want to invest in the equipment (seed dryers only). The group suggested that higher scores should also be given if farmers want to invest in some other equipment besides dryers. However, this option had been analysed by Estonian Seed Association and that concluded that widening the higher scores system to other equipment besides dryer will not give much effect, because few extra scores will normally not determine receiving of the support and the farmers mostly already have the necessary equipment.

Suggestions for the improvement of organic seed use by the stakeholders included:

- Promotion of the use of organic seed instead of promoting the production of organic seed, because the subsidization of seed production has not been justified by market demand yet;
- Sometimes, organic seeds are not used because famers are looking for a specific variety;
- The price difference should be less than 100 euros;

Steps to ensure that relevant stakeholders remain involved were:

- The Ministry of Rural Affairs together with the Organic Farming Platform is willing to initiate a seed expert group;
- The current organic farming development plan, that is compiled and administrated by the Ministry of Rural Affairs, will end in 2020. It will be reviewed and complemented, incl. the priorities. The new development/action plan will be compiled and administrated by the organic sector organization.

2.3. SWOT analysis - Analysis of domestic opportunities based on presentations and group-work – Estonia

Subsidy system

STRENGTHS	WEAKNESSES
Several schemes support organic seed: • The Ministry of Rural Affairs supports conversion to organic: farmers get financial support for buying organic seed (farmers receive 10% higher subsidies); • The Ministry also offers higher subsidies for those who sow with organic certified seed (support under the rural development program – M11 for organic support: "20% higher support is available for agricultural land per hectare used for growing cereal that has been sown with certified organic seed or for agricultural land per hectare used for growing potatoes sown with certified organic seed.”;	• For cereals financial support for buying organic seed works well but for potatoes, the amount bought of organic potatoes seed is not that high; • The financial support does only partly cover the farmer's expenses for buying organic seeds; • Organic sawing M11 subsidy is used the least (lowest area size). • No data is collected on the use of the database (how often it is used and by whom).

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• To receive subsidy, it is obligatory for farmers to attend training; • Subsidies can be used to buy a dryer and other equipment.	
OPPORTUNITIES	**THREATS**
• Subsidize further seed production, the Estonian government is already considering giving support to seed producers under the condition that the quality of the seed is good, maybe in joint subsidy to purchase equipment, or benefiting from access to seed cleaning facilities; • Subsidize further the use of organic seed and raise awareness of the extra 20% subsidy available for sowing organic seed amongst farmers.	• It is hard to convince seed producers to convert to organic agriculture; • Contract farming (seed production) will distort the market.

Derogation rules, national annex

STRENGTHS	**WEAKNESSES**
• To obtain derogations, the application (online or paper) must contain information about the species, variety, amount and the time period, when the seed will be used; • The applicant has to provide the reason why the seed available in the database is not suitable and why the use of non-organic seed is necessary (e.g. organic form of the desired variety is not available); • The authorisation will be granted for one season. • Organic farmers have to apply for derogation before a certain date (1st of March and 1st Sept); • If all the varieties of a species are sold out, then the general authorisation applies, which means that organic producers can buy and use certified non-organic seed, which is not treated with plant protection products.	• No specific derogation rules have been developed; • No categories and national annex have been developed to phase out derogations; • There is one list in the database that contains all the information about the varieties for which organic seed is available or has been available but is sold out; • If all the varieties of a species are sold out, then the general authorisation applies, however, organic producers are still obliged to ask for derogation (special permission) for this; • For crops not mentioned in the database at all, for which no derogation request is needed, there is no data about the amount of conventional seed used or the varieties requested; • Farm saved seed are accepted as organic if they come from the farmer's own field, and then the farmer does not need to ask for derogation when using it.
OPPORTUNITIES	**THREATS**
• Development of a body, expert group or roundtable which sets out rules to develop the authorisation categories and the national annex.	• Farm saved seeds maintain their pivotal role because no derogation is needed.

Database

STRENGTHS	**WEAKNESSES**
• Functioning organic seed database exist; • Database is updated as soon as new information is received; • Seed availability and unavailability are highlighted with different colours; • Foreign suppliers can enter the database after approval as a seed producer and after the seed's certification as organic by the Agricultural Board;	• Database is an excel file, no possibility for seed producers/suppliers to directly access the document; • Not all organic seeds are put on the database, some of them are sold directly to farmers; • Multiple datasets exist in separate Excel files: one Excel on seed lots produced in Estonia, one on organic seed, one on certified seed lots. However, these are not connectable as they serve different purposes; • Low interest from companies to build a seed sales database; • The database is not easy to find (currently there is no separate web address for the database);

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	• To enter seed in the database you must be recognized by the Agricultural Board of the Ministry of Rural Affairs as a producer and supplier of *certified* organic seed and pay an entrance fee of 40 EUR to cover administrative costs.
OPPORTUNITIES	**THREATS**
• IT improvement of the Ministry's Agricultural Board's customer portal is foreseen, the database could be included in this development; • Make information available in the database about variety characteristics; • Involve farmers in the improvement process of the database; • Make the database more interactive to speed up the exchange of information between seed suppliers and buyers, especially in high season, and reduce bureaucracy); • Allow seed companies the opportunity and access to put their offer in the database themselves; • Link the results of the field trials conducted by the Agricultural Research Centre with the database (this would help organic producers to make better decision about their production); to add information about characteristics on the varieties (this would help organic producers to make better decision about their production); • Raise the awareness of organic producers about the database by promoting the database and explaining how the database is used in the trainings and information materials (e.g. organic farming gazette) • Make the database easily accessible; • Reduce administrative costs and burdens to access the database.	• Use of uncertified seed is a problem. Seed companies sell grain for animal feed, but it is not known how farmers use it (either for animal feed or for sowing); • Farm saved seed remains a problem as it distorts understanding on availability of organic seed, and they do not appear in the database.

Training opportunities

STRENGTHS	**WEAKNESSES**
• Knowledge transfer programs are offered and are obligatory for organic farmers requesting the subsidy. It is a 2 days training program and within the 5-year contract period, including another 2 days seminar.	• The organic production training programs are voluntary, unless the farmer wants to receive the financial support, then it is obligatory.
OPPORTUNITIES	**THREATS**
• The compulsory training to receive subsidies is a great advantage in Estonia. Further diversifying compulsory training to match the different subsidy categories could be considered (e.g. extra course on sowing with organic seed and field sanitary issues); • Training courses on the access and use of the national organic database for farmers and seed suppliers; • Training on the New Organic Regulation for all involved stakeholders, incl. researchers; • Training on organic production in general for farmers; • Practical training on seed cleaning and seed storage for organic seed producers; • Practical training on seed health, seed cleaning and storage on farm saved seeds;	• In lack of training, farmers will use uncertified seeds or grain seed sold for animal feed that they saw for organic production; • In lack of training, farmed saved seeds will be harvested and stored without proper management and lack the quality needed for growing under organic conditions.

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• Training/campaign on the dangers of sowing seed sold for animal feed could be carried out; • Training on weed management in organic, as well as on the possibility of non-organic certified seed to transfer pesticide residues into the crop.	

Access to cleaning equipment

STRENGTHS	WEAKNESSES
• The Estonian Organic Action Plan set out plans to provide access to organic seed producers to "seed centers" providing with techniques and equipment for cleaning the seed; • Some farmers in Estonia have already good cleaning equipment.	• Farmers invested in equipment because they do not want to cooperate; • Farmed saved seeds should also have access to necessary facilities.
OPPORTUNITIES	**THREATS**
• Subsidise the setup of cleaning facilities, or to those who already have good equipment subsidize educational activities or the providing access (renting out) to cleaning facilities to other producers/farmers; • Provide separate cleaning facility centres (seed centres) for farmed saved seed processing.	• Influenced by past experiences, the seed centers will not receive priority or support which postpones the infrastructural development for seed processing; • Lack of cooperation from growers.

Organic breeding and variety testing

STRENGTHS	WEAKNESSES
• The Estonian Crop Research Institute (ETKI) has bred suitable varieties for organic farming, esp. for disease resistance; • There are ongoing organic field trials in cooperation with farmers in a selected range of crops (cereals, potato, legumes-peas and beans restarted); • There are open field days organised; • There are trials for tomato and garden pea varieties.	• These trials and their results are not well communicated to the stakeholders.
OPPORTUNITIES	**THREATS**
• Comparative trials of good quality farm saved seeds and certified organic seeds could be also planned out, to point out key differences between them; • The new Estonian breeding program for 2020-2030 could involve a more participatory breeding focus with a wider set of stakeholders (along the value chain, incl. e.g. processors, bakers, famers, consumers; etc) to raise awareness on the value of organic breeding.	• The new Estonian organic farming development plan will not focus enough on breeding programs for organic varieties in view of currently perceived lower market demand for organic seeds.

Expert roundtable

STRENGTHS	WEAKNESSES
• There are highly qualified experts in Estonia with strong experience and thorough international outlook, forming a good basis for facilitating the work of such group; • There is willingness to set up an expert group by the • Ministry of Rural Affairs the Organic Farming Platform in the country.	• There is no organic seed expert group currently in Estonia.
OPPORTUNITIES	**THREATS**

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• An expert round table could help the Ministry of Rural Affairs to define breeding niches based on the cultivar/variety preferences of farmers (e.g. based on derogation requests and on farmer surveys); • Further roles could be helping the Ministry to set up derogation categories and national annexes in preparation for the implementation of the new Organic Regulations and the phasing out of derogations step by step; • The expert group could inform the new Estonian breeding program for 2020-2030 with breeding needs (variety lists); • The expert group could prepare regional recommendations for varieties; • It could help the integration of organic heterogeneous materials and new propagation materials in the system; • The expert group could help balancing the market supply and demand on seeds (see Dutch example of such group).	• Without a central expert group, it will be more difficult to build up market supply of seed for the right varieties, and the niche continues between demand and supply, and the 2036 target of phasing out derogations will not be met.

Traditional varieties and farm-saved seeds

STRENGTHS	WEAKNESSES
• Growers use a significant amount of farmed saved seeds –part of traditions.	• The quality of farmed saved seeds is low or unknown; • Their exact quantity is unknown; • Their origins are not necessarily known.
OPPORTUNITIES	**THREATS**
• Set-up a separate registry for farm saved seed for monitoring of seed use; • Monitor varieties for which farmed saved seed in preferred versus certified organic seed; • Educate farmers on farmed saved seed health and field sanitation issues; • Develop a system for helping farmers in seed processing in the new organic farming development plan (2020-2030); • Develop incentives (either through variety assortment, or through financial incentives or risk reduction) to promote the use of organic certified seed compared to farmed saved seeds.	• The use of farmed saved seed will remain significant until organic certified seed is much more expensive and does not provide the yield or quality expected by growers; • Lack of knowledge in seed health and field sanitary issues presents a danger in transferring diseases; • Lack of interest from farmers to convert form farmed saved seed to organic certified seed.

3. Latvia

3.1. Reflections on the Status Quo of the Organic Sector and Organic Seed Production

Latvia shows a minor growth in the number of organic farmers, from 4,145 in 2016 to 4,178 in 2017. The trends are similar for land area, with a growth from 14.3% (259.000 hectares, 2016) to 14.8% (265 000 hectares) of the total agricultural land area (2017)[4]. Based on this IFOAM International's data from 2017, organic land includes 44.3% grassland, 50.8% arable crops and 0.9% permanent crops.

The Ministry of Agriculture confirmed that the organic sector continues to grow. There are about 190 seed growers in Latvia, out of which the number of organic seed producers (specialised farmers and

[4] https://www.ifoam-eu.org/en/organic-europe

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research institutes) is small and variable, approximately up to 20-26 in last two years, 50% of them are entering their offer in the database. In 2018, they produced only 150 ton of organic seeds, out of which 3.2% was entered into the database. From 2019, seeds produced abroad could be bought in Latvia, and data will also be available on those seeds. Main crops on the organic seed database are spring and winter cereals, potatoes, vegetables, winter oil rape, grasses, buckweet, fruits and bushes.

95% of the seeds used in organic agriculture, however, are still conventional in the country. Organic farmers are active in asking for derogations, each year 2000 derogations were asked for and received. In order to address issues related to the development of organic seed production, the Ministry has set up a working group – organic seed expert group.

The Institute of Agricultural Resources and Economics (AREI) has an organic breeding program which focuses on barley, pea, potato, winter and spring wheat, oat. For spring barley, AREI developed a variety suited for organic farming called “Rubiola”. Their pea variety “Bruno” has high quality protein and has a good market in Sweden for superfoods. For potatoes they focus on early varieties, pre-sprouting and resistance against phytophthora.

3.2. Main Outcomes of the Group Discussions

Opportunities to improve the Latvian national organic seed database were identified as the following:

- Simplicity, timeliness (also updates in different moments, e.g. from the beginning of the field inspection, after certification, after the end of seed production), and easy access to the database are essential;
- It could be interesting to create a common webpage with the two other Baltic countries, more cooperation e.g. regarding the database (common listing with all varieties available and common characteristics interesting for all countries);
- Based on a unified variety description template, the description of the varieties (description, yield, resistances/problems with diseases climatic/regional suitability) could be added, as well as information on how they were produced, as well as seed producers’/suppliers’ locations through a map to find the closest supplier, including shipping/transport opportunities in a given region;
- An automated option could be developed on the State Plant Protection Service site to upload the information on certified seeds directly in the database;

Suggestions by the participants to improve the production of organic seed in Latvia were:

- In order to improve the situation, it could be possible to introduce a deadline for famers to order seeds, and have a better understanding of demand;
- The barriers connected to organic seed, e.g. lower yields, weed and disease pressure has to be removed via targeted breeding of varieties preferred by farmers, the state should invest in breeding, and ensure that material and technical support for organic breeding and seed production (technical support in seed cleaning, access to equipment and machinery in seed production for farmers, trial fields) are available;
- There is a need for capacity building in the sector, and first a training needs assessment across the sector;
- Direct payments should be differentiated between certified seeds, certified organic seeds and uncertified organic seed material through direct area payments (basic seed categorization is not sufficient).

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- Investment in equipment should be also differentiated. Seed (certified) should be also classified according to variety use (for consumption, for feed, for sawing, for reselling).

The use of organic seed by farmers could be improved by:

- In Latvia, farmers are used to ask for derogation. It would be necessary to convince farmers to change their habits (with trainings and subsidies);
- The major problems in the organic farming sector is that it is difficult to get quality seeds, there is a lot of diseases, lower harvest, it is more expensive, and that farmers go around the problems instead of buying organic seeds. There is not enough seed produced, the seed brought from abroad are usually not good quality, difficult to buy seeds directly from producers and have them delivered, therefore the national production needs to be increased in quantity;
- CAP support for organic farmers remains crucial to increase the amount of organic seed used. Farmers should be supported for the use certified organic seed through supplementary payments stated clearly in national policy (e.g. up to 25% extra payment), to create a stimulus;
- Education given to organic operators to facilitate a better understanding and higher usage of organic seed, but also to raise awareness of buyers and growers about organic seed via internet, television, and training, including the use of organic to improve human and environmental health should be put higher on the agenda;
- Investing in research to confirm that organic seed is best for organic farming;
- The pesticides used on the conventional seeds are contaminants that are connected to the food production. The Baltic market should be more transparent on where the seeds come from;
- Limiting the number of derogations.

Opportunties to engage relevant stakeholders were:

- It would be necessary to strengthen the cooperation between all institutions involving control bodies and all stakeholders along the organic product chain (organic farmers association, expert group, processors, consumers, etc) to make effect;
- The already established seed expert group could help to formulate a national strategy and also work on its implementation (currently the expert group has 4 seed growers, 4 representatives of the Ministry of Agriculture and control institutions, 4 producers, providing documentation on derogations, covering a lot of topics). They could meet more regularly and improve their communication as well as extend to involve seed suppliers;
- ECO-PB could participate in the Latvian expert group and invite guest experts from other Member States for institutional learning and knowledge exchange.

3.3. SWOT analysis - Analysis of domestic opportunities for Latvia

Subsidy system

STRENGTHS	WEAKNESSES
• Under the Rural Development Programme (direct payments) Latvia offers subsidies for those who grow seeds – organic and conventional – with a minimum production per hectare; • The Ministry offers mandatory training to organic farmers – 180 hours – before receiving any subsidies and in this curriculum, seed production is included.	• No differentiation between different categories of seed; • It is still easier and cheaper to obtain (un-)certified conventional untreated seed with derogation or organic seed directly from farmers without use of data base.
OPPORTUNITIES	**THREATS**

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• Direct payments could be differentiated between certified seeds, certified organic seeds and uncertified organic seed material (farm saved seed) through direct area payments; • Investment in equipment should be also differentiated; • Seed could be also classified according to variety use (for consumption, for feed, for sowing, for reselling) • Include propagating materials new in the Organic Regulations in the subsidy system: • Collaboration with Estonia on training material development for compulsory organic seed production training for farmers who ask for subsidy; • Stratified training system for different propagating materials; • Subsidize transport costs for farmers to obtain organic seed; • Subsidize certified organic seed use with a higher incentive than non-certified (farmed-saved seed), incentivise farmers who are selling seed directly to other farmers to have their seed lots tested for health; and in a next step, to certify their seeds; • Focus on subsidising the end users as well to increase the demand for organic seed.	• There is no NGO lobbying for this issue, if the policy makers are changing, there will not be a continuity; • The amount of uncertified (conventional and organic) seed on the market (direct sales) are still high. This is built on a trust system that is stronger than the incentives for certifying seeds – subsidy development should take social factors also into account.

Derogation rules, national annex

STRENGTHS	WEAKNESSES
• There are both single and general derogations in Latvia. The list of crops for which a general derogation applies is published in the official Gazette of the government of the Republic of Latvia; • The national legislation sets out several deadlines for applying for derogations per crop types; • Regarding seed mixtures, the farmer is obliged to ask for a derogation for each crop and variety separately; • The exchange or selling of non-certified - farm-saved seeds is not allowed.	• There is no national annex; • It is too easy to obtain derogations; • Many farmers use farm saved seeds: official statistics are missing on the quantity and quality of farm-saved seeds. Farm saved seed is accepted as organic seed. Farmers can prove their seed usage through field history: *amount of seed sown-> seed harvested= seed re-sown and sold (only in case of certification);* • Information on produced propagating materials at control bodies and on seed demand through derogations the Plant Protection Service is not used for strategy building.
OPPORTUNITIES	**THREATS**
• Limit derogations, the seed Expert Group could develop a strategy for phasing out derogations for strategic crops, e.g. limit derogations over a certain time period, e.g. 5 years); • Set deadlines for farmers to order seeds: to ensure that the quantity from preferred varieties are available; • Develop national annex (see Dutch example); • Based on data collected on produced propagating materials at control bodies and on seed demand through derogations the Plant Protection Service, a comprehensive strategy for phasing out derogations by 2036 should be developed.	• In lack of a proper strategy for phasing out derogations the 2036 deadline will not be met; • It will be difficult to change the mindset of farmers who are used to using derogations.

Database

STRENGTHS	WEAKNESSES

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• Functioning web-based seed database exist; • Database is updated regularly; • The information where the seed is produced, what is the available quantity and when it is supposed to be available is already on the database; • Foreign suppliers cannot enter their offer to the database – since their much higher prices would distort the local market; • Only registered Latvian seed suppliers can send their offer of certified organic seed to the database manager who will upload the supply; • There are deadlines per crop types for entering offers in the database.	• There are no data available on the number of users of the database; • Not only varieties that have been tested for organic farming are entered in the database; • The unit is sometimes restricted to kilograms, when one needs tons; • Seed suppliers cannot enter the offers directly, only the database manager; • There is no incentive for seed producers to put their seed offer on the database. They can also sell it directly to farmers; • In order to sell through the database, a farmer has to be registered as a seed producer and certify his seeds.
OPPORTUNITIES	**THREATS**
• Transport/shipping opportunities could be indicated; • More descriptive information on varieties could be added; • The database should be more interactive, real-time, allow suppliers to enter offers directly, and should be updated at different times throughout the year (field inspection, certification, end of seed production); • For the Baltic States, for crops of common interest, the database should be made more easily accessible.	• Organic seed producers remain reluctant to place their offers on the database if that remains more difficult than selling seed directly to farmers; • Farm saved seed use remains high, without ever appearing on the database-distorts understanding on real use and hinders strategy building for production targets and breeding objectives.

Training opportunities

STRENGTHS	**WEAKNESSES**
• In order to receive subsidies, farmers are obliged to take part in a 180 hours training, including organic seed production;	• There are many administrative requirements for seed producers; it takes educated farmers to engage in these administrative burdens.
OPPORTUNITIES	**THREATS**
• Education could be provided on the derogation rules and how phasing them out is a requirement now in the new EU organic regulations; • There is a need for training on the advantages of using organic seeds in general amongst farmers, so the demand for organic seed could increase supported by ethical, environmental and human health principles; • Education to farmers could be provided on seed health and field sanitation issues, and on the benefits for sending in seed lots for testing; • Farmers could be also educated to enable them to cope with administrative burdens required for seed certification, database use, etc.; • Farmers could also be trained on the effects of residues on the conventional seeds; • Since Estonia also has a training system to obtain subsidies, exchange of experience between the two countries could be beneficial; • Training should be provided to farmers using farm saved seeds on seed health, seed saving and storing; • A training needs assessment across the organic sector would be beneficial on organic seed.	• …

Access to cleaning equipment

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STRENGTHS	WEAKNESSES
• For certified organic seeds the seed cleaning must also be done in a certified location for certified organic seed.	• The requirements for seeds producers for quality are very high and this makes the seed production complicated; • There is not enough suitable equipment, e.g. cleaning machines, that the farmers could use.
OPPORTUNITIES	**THREATS**
• It could be beneficial to exchange ideas on seed centres with Estonia, and what experiences were gained in the past to avoid repetition of pitfalls; • Subsidy should support the establishment of cleaning facilities at the regional level.	• Quality and health of seed, especially farm saved seed and uncertified organic seeds (what farmers call "grains with germination ability") exchanged between farmers remains low, carrying the risk to spread disease.

Organic breeding and variety testing

STRENGTHS	WEAKNESSES
• Latvian organic varieties are tested for their suitability for organic farming (VCU tests) at the Latvian University of Agriculture and at AREI, testing is organized for potato, cereals (spring barley, winter rye, winter triticale) and peas; • The organic breeding program at AREI covers barley, pea, potato, wheat, oat; • In the Latvian Catalogue of Plant Varieties there is set information regarding variety suitability for organic farming.	• Breeding is concentrated in a few institutions, mostly research and academia; • Even some robust varieties are available their quantity is not necessarily enough for the market; • The largest organic seed producers are also the research institutes in Latvia.
OPPORTUNITIES	**THREATS**
• More investment from the state is needed in organic breeding; • Participatory breeding should be developed with farmers, culinary experts, and processors; it could be beneficial to raise awareness on breeding and define breeding targets to remove current barriers connected to organic seed, e.g. lower yields, weed and disease pressure, taste issues.	• The variety assortment and seed quantities remain limited in lack of organic breeding programs.

Expert roundtable

STRENGTHS	WEAKNESSES
• Organic seed expert group is functional already, established by the Ministry of Agriculture in 2006; • Crop types are represented by experts: potato, grain, fodder crops, vegetables, and the members of the control bodies and experts on seed legislation are part of the group. • The president of the organic farmers association is also invited as an observer; • The expert group meets 1-3 times a year; • The role: advisory and developing amendments to the existing legislation, giving advice for the derogations, and discuss force major events e.g. severe draught.	• The experts don't meet very often and do not communicate very well; • There is a lack of unified opinions/ideas from the different stakeholders: it has become a barrier to finding a common ground.
OPPORTUNITIES	**THREATS**
• The expert group can help to formulate a long term organic seed strategy, work on national annexes and categories; a strategy to phase out derogations and also work on the implementation of the New Organic	• The legislation confines the space for negotiating the incorporation of new and different views and possibilities: i.e. there cannot be a differing opinion to what is written in the law, but at the same time,

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Regulation (e.g. introduction of new propagating materials in the system in Latvia); • The expert group should be extended to involve seed suppliers and food processors who influence the markets; • Individual organisations, e.g. the seed association should discuss first with themselves their unified views and then approach the expert group; • The expert group could meet more frequently and extend their roles (see Dutch model).	wider stakeholder negotiations would make the amendment of the law too complex; • No interest to extend the functions and roles of the expert group; • Low interest persists in unifying views of different stakeholder groups.

4. Lithuania

4.1. Reflections on the Status Quo of the Organic Sector and Organic Seed Production

In 2016, there was 2,539 organic farmers in Lithuania covering 7.6 % (222,000 hectare) of the agricultural land area[5]. In 2017, the organic share of agricultural land showed increase to 8.1% (234,000 ha), including 33.6% grassland, 64% arable crops (oat, wheat, barely, triticale, buckwheat) and 2.5% permanent crops. However, the number of organic farmers somewhat decreased (to 2,478 farmers).

Only 2% of the organic seed demand in Lithuania is covered by organic seeds. In Lithuania 46 producers are authorized to produce organic seed. This includes national and foreign seed companies, traders and specialized farmers. Most organic seeds produced are for export, and the cleaning and certification of the seed is also often done abroad. There is only one big organic seed company called UAB Agrolitpa. This company is highly successful and has a diverse portfolio of activities from seed drying to final seed cleaning and help in certification. They work with leguminous crops (30%), buckwheat, mustard, root radish. They cooperate with research centres for testing, but also run a laboratory where they test the quality of the seed (germination, purity, moisture, etc). They have a licence agreement with national and foreign breeders or variety owners (e.g. clover, alfalfa, ryegrass), and they also produce for them on request. The main seed multiplication efforts are one for buckwheat. There is little organic seed offer on the database (due to the fact that the seed is exported).

The Lithuanian Research Centre for Agriculture and Forestry conducts organic breeding programs for the major field crops, vegetables and fruits. It carries out experiments on soy cultivation technologies in an organic crop rotation, and investigates through the LegValue project the agronomic and technological properties of the new cultivars and breeding lines of peas, beans, lentils and chickpeas and their value in the conventional and organic production systems. UAB Agrolitpa has also private variety trials for 35 species, and in collaboration with organic farmers they have demonstration variety trials for field pea, field beans, common oats, buckwheat, fodder radish, barley, linseed, greening mixtures. They also collaborated in 2018 with the Latvian Agriculture Science Centre of Latgale.

4.2. Main Outcomes of the Group Discussions

Opportunities to improve the Lithuanian national organic seed database were identified as the following:

[5] https://www.ifoam-eu.org/en/organic-europe

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- The focus was placed on the technical improvements: the database should be real time, updateable;
- It should be able to handle the updates of available organic seed quantities for varieties at all times;
- The database should be accessible by the users and seed suppliers directly
- The current database should be made easier to find for farmers.

Suggestions by the participants to improve the production of organic seed in Lithunia were:

- There is a need to clarify better which are the varieties suitable for organic, there is a lack of knowledge on that at the farmers who would otherwise engage in organic seed production;
- The definition itself of a variety suited for organic production should be clarified further resulting in a strong definition;
- The national variety list should contain varieties based on rigorous official variety testing and a clear legal background;
- The main problem is that seed producers have no guaranty that they can sell their offer on the organic market in Lithuania. Internationally they get a better price.
- Introduction of subsidies for both production and use of organic seed for farmers;
- See if there are possibilities to multiply seeds from seed companies in license.

To increase in use of organic seed participants highlighted:

- The role of education targeting both farmers and consumers on organic principles;
- The need to communicate to farmers about which varieties are suitable for organic farming, and think from the farmers' point of view, listening to their problems (fertility, maintenance, weed and pest management, etc);
- Research has shown that if you use organic and conventional seeds from the same variety; the conventional seeds give a higher yield. This is a disincentive for farmers to buy (more expensive) organic seed. Farmers need understanding of other factors than yield that support the organic principles. Also, investment is needed in breeding to develop organic varieties that matches conventional in yield.

Opportunities to improve the collaboration between stakeholders in Lithuania:

- Participatory education/breeding with the aim of conduct long-term organic farming research on farm, and share its results with a wider community;
- Expert groups should be established involving all kinds of stakeholders: politicians and policymakers, breeders, suppliers, seed producers, farmers, technical experts of seed production, certifiers;
- Exchanges through demo field visits, field trials, stakeholder seminars and workshops;
- Learning exchanges with the other Baltic States non diverse issues.

4.3. SWOT analysis - Analysis of domestic opportunities for Lithuania

Subsidy system

STRENGTHS	WEAKNESSES
• Under the Lithuanian Rural Development Plan 2014-2020 measure "Organic Farming" subsidies exist per	• …

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crop type, e.g. for organic cereals and perennial grasses for seed or under conversion to organic cereals and perennial grasses for seed (hectare based); • The seed producer has to be included in the list of certified propagating material suppliers or have signed a contract for the cultivation and purchase of plant propagating material with suppliers of propagating material and have declared a certificate of crop inspection of areas for perennial grass seed (for which support is requested) issued by the State Plant Protection Service under the Ministry of Agriculture; • There are other subsidies, direct payments per ha for using certified seed (organic or conventional) under the RDP (16EUR per ha for cereals).	
OPPORTUNITIES	**THREATS**
• Subsidies for certified organic seed use could de distinct and somewhat higher in the case of certified organic seeds; • Both the production and the use of organic seed could be subsidized.	• …

Derogation rules, national annex

STRENGTHS	**WEAKNESSES**
• There are both single and general derogations in Lithuania; • The category 2 list contains the crops and varieties for which organic seeds are available. For these crops a single derogation is needed (each costs 7EUR); • There is also a general derogation list (checked by the ministry and issues PI "Ekoagros") for grass and fruits/vegetables seeds that are impossible to get in the market for a few years. The list is updated yearly; There are seasons for derogation applications: • -Preparing for spring sowing - from February 1 of the current year until the end of sowing. • -preparing for winter sowing - from July 1 of the current year until the end of sowing; • -preparing for perennial grasses for sowing - all year round.	• It is too easy to obtain derogations: if seed is not available or not available in the requested quantity; • Farmers can use farm saved seeds, which are accepted as organic seed; • Farm saved seeds are not monitored for quantity or quality.
OPPORTUNITIES	**THREATS**
• Limiting derogations; • Set deadlines for farmers to order seeds: to ensure that the quantity from preferred varieties are available; • Develop a national board which defines the limitations on derogations together with certifier Ekoagros based on seed demand, as well as provides a guarantee that seed producers can sell their offer on the organic market in Lithuania based on this demand;	• In lack of a proper strategy for phasing out derogations the 2036 deadline will not be met.

Database

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STRENGTHS	WEAKNESSES
• Functioning organic seed database exist; • A list of seeds of organic varieties and their available amount/quantity (kg/tons) is visible on the database. The users of the database first choose the right crop and then the variety they need; • The varieties offered on the database must be suitable for national growing conditions (even when offered by foreign suppliers).	• No data is collected on the use of the database; • Seed suppliers cannot enter the offers directly, only the database manager; • Farmers find it difficult to find the database; • There is a handful of offers on the database by organic seed producers for vegetables, forage and arable crops; • There is no incentive for seed producers to put their seed offer on the database, they get higher price from foreign seed companies, and they can also sell it directly to farmers; • Farm saved seed do not appear in the database.
OPPORTUNITIES	**THREATS**
• The database could be significantly extended and improved for us, including basic technical issues such as real-time updates, access by suppliers and farmers, offers put directly on the database, to more descriptive details on the varieties; • A recommended replacement list should be developed for varieties for which quantities are not enough; • Provide incentives for seed suppliers to enter the seed on the database and not sell directly to farmers.	• Organic seed producers remain connected to foreign markets and not deliver for the local market.

Training opportunities

STRENGTHS	WEAKNESSES
• There is lot of useful knowledge accumulated at leading seed company Agrolitpa; • To fulfil requirements for foreign markets (export) seed must be of good quality – farmers are able to fulfil these requirements; • The Agency of Rural Business and Market Development offers training on organic production for farmers.	• The training is not a pre-requisite to receive subsidy for organic production; • The training does not include organic seed production or management.
OPPORTUNITIES	**THREATS**

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• Education is mostly missing amongst farmers on varieties suited for organic, a reliable variety list as well as wide-spread education would facilitate the closing this gap; • Farmers should be educated on the database, how it functions, where it can be found and why it would be useful on the long run to use the database so the demand for seed is more visible and easier to plan at the national level; • Training could be provided on organic seed production in general, on seed health, on seed storage, to increase the supply of seed in the country; • organic seed production should be included into the training currently offered to organic farmers on organic production by the Agency of Rural Business and Market Development; • Farmers could be educated about the added value of organic varieties.	• ...

Access to cleaning equipment

STRENGTHS	WEAKNESSES
• There is one advanced company Agrolitpa with good facilities.	• Many companies produce seed for export, these seeds are also cleaned abroad.
OPPORTUNITIES	**THREATS**
• Education shall be provided on seed management, including cleaning, treating and storing the seeds for farmers; • Subsidy should support the establishment of cleaning facilities at the regional level; • Agrolitpa could offer training services on seed management and provide access for farmers to their facilities to learn the use of equipment.	• If seeds cleaned abroad and later certified abroad that does not facilitate the interest in investing in seed cleaning facilities in the country; • Seed cleaning facilities are also required for farm saved seeds to avoid disease transfer and contaminations.

Organic breeding and variety testing

STRENGTHS	WEAKNESSES
• The Lithuanian Research Centre for Agriculture and Forestry runs research on organic farming and breeding.	• There are only field trials for conventional varieties; • VCU testing is performed under conventional conditions; • DUS testing for EU catalogue is often done in the Netherlands or in Poland; • There are no suitable varieties available for organic production for certain crops (e.g. lupin); • Plant breeders who are doing some small-scale breeding have no access to organic testing fields.
OPPORTUNITIES	**THREATS**
• Testing under organic conditions could be carried out but funding is needed, or access to testing fields; • There is a need for more research and investment in organic breeding to be able to develop an organic variety assortment for at least a selected strategic group of crops.	• Lithuania remains dependent on the offers of foreign organic seed companies.

Expert roundtable

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STRENGTHS	WEAKNESSES
• There is willingness to set up an expert group. The Organic Farming Association and the Ministry support the establishment of such group to develop a list with varieties that are suitable for organic farming; • Scientists already regularly discuss important topics with the Ministry, incl. organic seeds.	• Lithuania does not have at this moment a seed expert group.
OPPORTUNITIES	**THREATS**
• The expert group could help formulate a list of varieties suited for organic; • Carry out research on demand for organic varieties and coordinate demand and supple with seed producers (foreign or local); • The Group could advice the Ministry in investing in breeding programs based on variety demand; • Could build strategy for phasing out the derogations by 2036; • can help to formulate a long-term organic seed strategy for Lithuania, • Can advise on training/education needs of farmers on organic seed; • Define research priorities on substances for organic seed treatment and proving the benefits of organic seeds vs conventional seed; • Advise the Ministry on the implementation of the upcoming changes in the EU Organic Regulations in Lithuania.	• …

5. Recommendations

Similarities among the Baltic States

As previous chapters demonstrate, the Baltic States are not homogenous when it comes to the production and use of organic seed, though some common characteristics apply to all three countries, including that:

- Organic farming in general shows growth in each country compared to previous years;
- There is a lack of organic seed and organic varieties in general;
- Organic farmers and research institutes are the main producers of organic seed;
- Many organic farmers re-use their own seeds since farm-saved seeds (FSS) are accepted as organic seeds by the national authorities;
- Demand for certified organic seeds are in general quite low, since it is easy to obtain derogation, and the higher price of organic seed is an obstacle for farmers. Most of the certified seeds used in organic agriculture in the Baltics are untreated conventional seeds;
- Organic seed is demanded by organic farmers for specific varieties that are often not available in organic, which further contributes to the use of untreated conventional seed;
- The organic seed database and the education of organic farmers need improvement;
- Considering the history of the three countries and the cultural signification of collectivisms, collective cleaning equipments or special regional seed cleaning centres with government support would work well, providing services for seed management.
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However, the legislative and policy framework, the status and usage of the national seed databases, the expert groups and several other aspects differ and could be analysed only in the context of each country separately.

Fields of potential collaboration in the Baltic States and Policy Recommendations

Based on the SWOT analysis and the LIVESEED booklet '*How to implement the organic regulation to increase production & use of organic seed*'[6], here are some recommendations for the Baltic States to create a stable market for organic seeds:

LATVIA

- Should share their experiences with setting up and maintaining an expert group on organic seed and how they function and were set up, with Estonia and Lithuania;
- Share their system of mandatory training to organic farmers receiving subsidy which includes seed production;
- Subsidies for seed producers – organic and conventional – with a minimum production per hectare
- Share their data/list of varieties suitable in the other Baltic States (especially in Lithuania) under organic conditions, and give the possibility to varieties multiplied in neighbouring countries and adapted to local conditions to be registered in the database;
- Subsidize transport costs for farmers to obtain organic seed;
- Subsidize certified organic seed use with a higher incentive than non-certified, incentivise farmers who are selling seed directly to other farmers to have their seed lots tested for health; and in a next step, to certify their seeds;
- Limit derogations, the seed Expert Group could develop a strategy for phasing out derogations for strategic crops, e.g. limit derogations over a certain time period, e.g. 5 years);
- Set deadlines for farmers to order seeds: to ensure that the quantity from preferred varieties are available;
- Develop national annex (see Dutch example);
- It could be beneficial to exchange ideas on seed centres with Estonia, and what experiences were gained in the past to avoid repetition of pitfalls;
- Participatory breeding should be developed with farmers, culinary experts, and processors; it could be beneficial to raise awareness on breeding and define breeding targets to remove current barriers connected to organic seed, e.g. lower yields, weed and disease pressure, taste issues.

ESTONIA

- In the new organic farming action plan emphasise the importance of organic seed for organic agriculture.
- The new Estonian breeding program for 2020-2030 could involve a more participatory breeding focus with a wider set of stakeholders (along the value chain, incl. e.g. processors, bakers, famers, consumers; etc) to raise awareness on the value of organic breeding;
- Set up a seed expert group with potential functions described in the SWOT-analysis;
- Should share the experience with their extensive subsidy system for organic seed use with Latvia and Lithuania;

[6] https://www.liveseed.eu/wp-content/uploads/2019/01/LIVESEED-FinalV2-WebInteractive-1.pdf

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- Further diversification of the compulsory training to match the different subsidy categories could be considered (e.g. extra course on sowing with organic seed and field sanitary issues);
- Should collect data on the users of the database;
- Investigate why the organic sawing M11 subsidy is the least successful amongst farmers;
- Could try subsidizing conversion stronger;
- A national strategy should be built for phasing out derogations by 2036;
- Raise the awareness of organic producers about the database by promoting the database and explaining how the database is used in the trainings and information materials (e.g. organic farming gazette);
- Build an inventory/registry of farmed-saved seeds to understand better the demand for seed and varieties;
- Push for the setup of regional organic seed cleaning facilities to allow farmers to learn and practice seed processing;

LITHUANIA

- Agrolitpa could offer or set up a training service for organic farmers who are wishing to engage in organic seed production, allowing them access to their facilities to learn the use of equipment and technology, and the organic farming training could include organic seed production in the curriculum;
- Set deadlines for farmers to order seeds: to ensure that the quantity from preferred varieties are available.
- Develop a national board which defines the limitations on derogations together with certifier Ekoagros based on seed demand, as well as provides a guarantee that seed producers can sell their offer on the organic market in Lithuania based on this demand;
- There is a need for more research and investment in organic breeding to be able to develop an organic variety assortment for at least a selected strategic group of crops, to do this a definition or organic variety should be clarified and widely accepted;
- There is willingness to set up an expert group in Lithuania. The Organic Farming Association and the Ministry support the establishment of such group to develop a list with varieties that are suitable for organic farming;

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ANNEX I. Stakeholders agreements

The National Workshop hold in Riga in January 2019, gave the opportunities to the different stakeholders participating to discuss and agree on the best activities to implement in order to increase the production and the use of organic seeds in the Baltic countries. In 2020, during the last phase of this project, an assessment will be done to compare those following agreement and see what was done in the country, what was not feasible and if the situation regarding organic seeds improved.

Estonia

Declaration of organic seed

Declaration of organic seed from Estonia

We, participants of the Liveseed workshop *Organic seeds in the Baltic States: How to increase the production and use?* in Riga on the 31th of January 2019

Aim to increase the production and use of organic seed in Estonia

Therefor we commit to the following initiatives, activities and actions in the coming year

Elen Peetsmann from Research Centre of Organic Farming of Estonian University of Life Sciences will:

- include the importance of organic seed use and production in the new organic farming action plan and make it a priority;
- continue the knowledge transfer program and include organic seed production and use in the information days.

Karen Ratsep from Estonian Seed Association will:

- cooperate with the Agricultural Board to improve the organic seed database.

Karin Zereen from the Ministry of Rural Affairs will:

- make the suggestions to the organic farming support measure to increase the support for the use of organic seeds and to widen it to other crops;
- initiate the establishment of an organic seed expert group together with the Organic Farming Platform.

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Declaration of organic seed

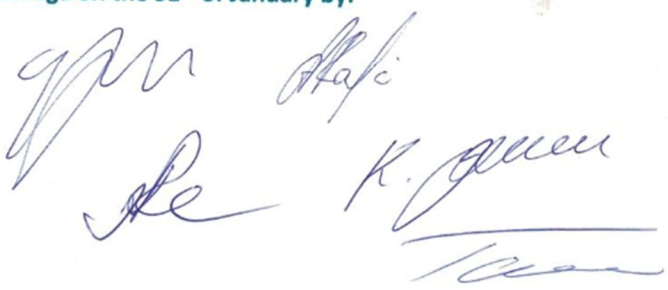
Airika Rahuoja (organic farmer and seed producer) in cooperation with the Estonian Seed Association will:

- start the discussion and make proposal to change the requirements to get extra points for investments in seed producing equipment in the investment support measure in RDP;
- do the inventory among organic farmers to find out which varieties should be tested for performance under organic conditions.

Ilmar Tamm from the Estonian Crop Research Institute will:

- do regular testing of varieties in organic field trials to find more suitable varieties for organic production;
- improve the dissemination of the results of these trials;
- include breeding varieties that are suitable for organic farming into the new Estonian breeding program.

Signed in Riga on the 31th of January by:



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Declaration of organic seed

We, participants of the Liveseed workshop *Organic seeds in the Baltic States: How to increase the production and use?*, in Riga on the 31th of January 2019

Aim - to increase the production and use of organic seed in Latvia

Therefore we commit to the following initiatives, activities and actions in the coming year

Ministry of Agriculture, State Plant Protection Service:

- Improve Organic seed data base, to make it easy to use for farmers.
- Include information about characteristics of varieties, expenses of deliveries etc.
- Propose area-based subsidies in Agricultural policy documents to support organic farmers using organic certified seed.
- Strengthen control institutions.
- Support educational activities.
- Expand functions and membership of Organic seed expert group – including representatives of processing industry with aim to clear out the needs of industry.

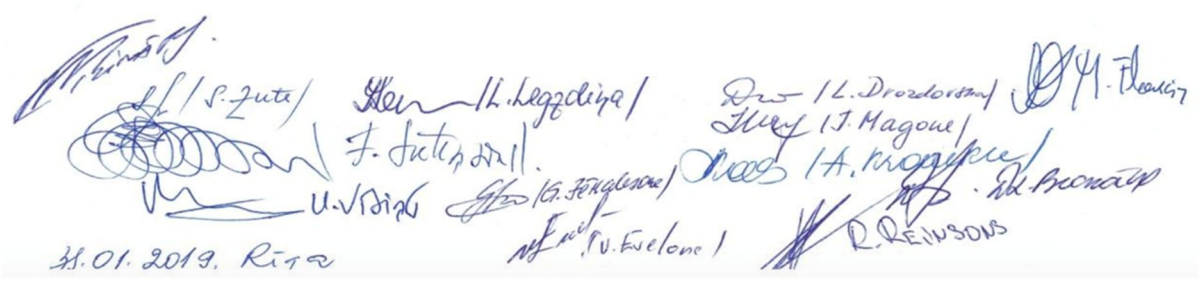
Researchers from AREI, University of Agriculture, TimacAgro:

- Organize trials for evaluation of suitability of varieties to organic growing conditions in different locations.
- Promote cooperation in seed production, create EIP groups for research on seed production
- Cary out educational measures that could promote users to require transparency of OF production.
- Participate in Organic seed expert group, communicate with organizations and society.

Association of Organic Agriculture, organic farmers and producers' representatives:

- To maximize the information included in in Organic seed data base about the availability of seed. This should include information from field inspections to seed certification
- Require additional support for use of organic certified seed
- To raise criteria to apply for derogations to use non-treated conventional seed
- Require more support for educational, information, and research activities
- Participate in expert groups, express coherent opinion.

Signed in Riga on the 31th of January by:



Lithuania

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Declaration of organic seed from Lithuania (name Country)

We, participants of the LIVESEED workshop "Organic seeds in the Baltic States: How to increase the production and use?" in Riga on the 31th of January 2019,

Aim to increase the production and use of organic seed in Lithuania

Therefor we commit to the following initiatives, activities and actions in the coming year

To propose to include into organic production trainings for organic producers a part about organic seed production:

- PI Ekoagros will prepare a proposal for the Agency for Rural Business and Market Development

To initiate to prepare a clear definition of variety suitable for national organic production:

Group of interests will prepare a proposal for the State Plant Service, the Ministry of Agriculture to formulate a definition:

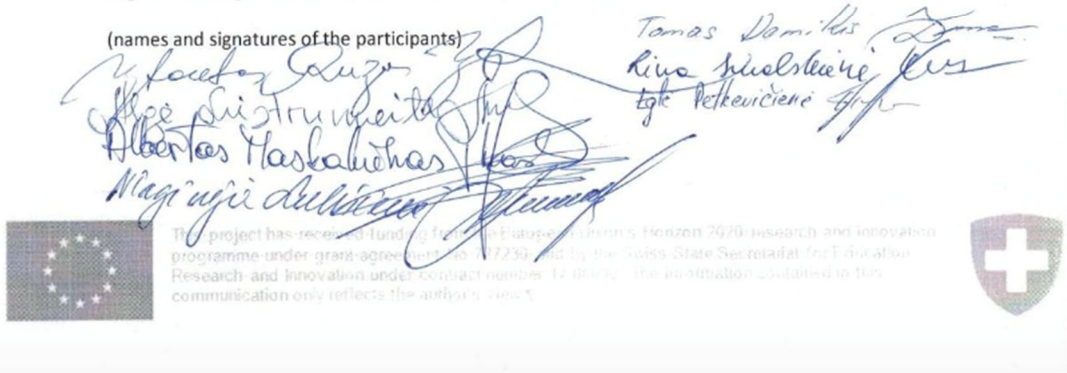
- PI Ekoagros
- LTD Agrolitpa
- LTD Scandagra
- Lithuanian association of seed producers

To improve the Lithuanian database of organic seeds:

- LTD Agrolitpa will propose technical improvements (ex... direct modification by users)

Signed in Riga on the 31th of January 2019 by:

(names and signatures of the participants)



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