



Market development of certified seeds in the Baltic States



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Certified seed volumes on the rise




Lithuania

2010–2015

35,8 thou t


2016–2020

69,3 thou t

 +94 %

2021–2025

84,6 thou t

 +22%



Latvia

2010–2015

14,1 thou t

2016–2020

27,7 thou t

 +96 %

2021–2025

33,4 thou t

 +20%




Estonia

2010–2015

18,7 thou t

2016–2020

32,7 thou t

 +74%

2021–2025

35,4 thou t

 +8%

Expanding crop area – one of the drivers of certified seed market



Lithuania

2010–2015

1,414 thou ha


2016–2020

1,679 thou ha

 +18 %

2021–2025

1,818 thou ha

 +8 %




Latvia

2010–2015

711 thou ha


2016–2020

889 thou ha

 +25 %

2021–2025

989 thou ha

 +11%



Estonia

2010–2015

408 thou ha

2016–2020

473 thou ha

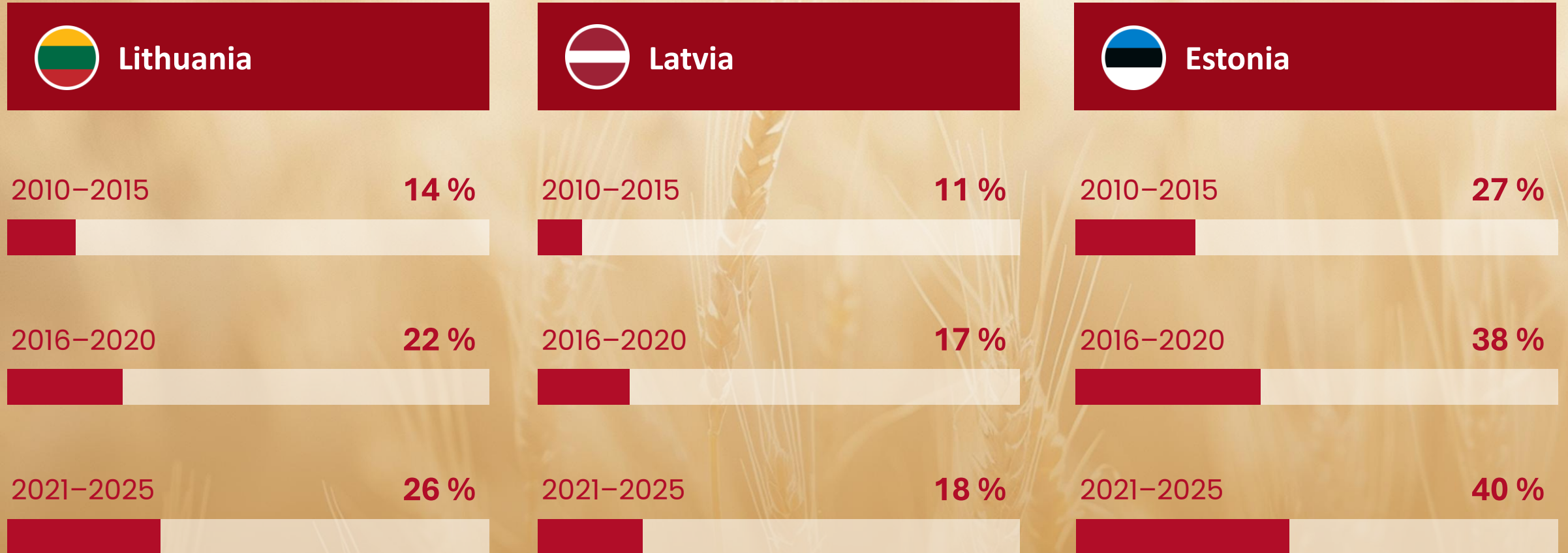
 +15 %

2021–2025

488 thou ha

 +3 %

More fields sown with certified seeds, %



Rapeseed and maize excluded, seeding rate – 220 kg/ha



**What drives differences
in certified seed usage
across countries?**



Differences in government support systems



Estonia

The farm must sow a specified area with certified seeds to qualify for support



Lithuania

The farm receives support for sowing certified seeds



Latvia

Support is provided to seed growers



Grey seed market holds back the development

- Different levels in different countries



Quality is the key advantage of certified seeds

- Each seed producer shapes the reputation of the entire market



**What is our
way forward?**



50%
EU average



línas agro^o



Thank you!