

HORIZON

2023



semae

All the seeds for tomorrow

HORIZON 2027

AN ADAPTATION PLAN TO THE AGRO-ECOLOGICAL TRANSITION

Due to the current climatic and geopolitical upheavals, French and European agriculture needs to adapt and deploy solutions more rapidly. The seeds and seedlings sector, which is also affected, is playing a more strategic role than ever. Its ability to meet the expectations of different types of farming, the State and Society is based on several essential pillars: innovation, maintaining production capacity, preserving leadership, and protecting and enriching biodiversity. In this context, SEMAE is launching its new strategic project «Horizon 2027», which aims at speeding up its transformation and adapt the industry to the agro-ecological transition.

4 STRATEGIC PRIORITIES

In «Horizon 2027», SEMAE sets out its strategy in 4 priority areas: 1/ improving the competitiveness of the seed industry, 2/ addressing the challenge of climate change and agro-ecological transition, 3/ promoting the industry's social responsibility, protecting and enriching biodiversity, and 4/ consolidating SEMAE's organisation to meet the industry's commitments. This work is broken down into several issues, each of them leading to an operational action plan.

CONTENTS

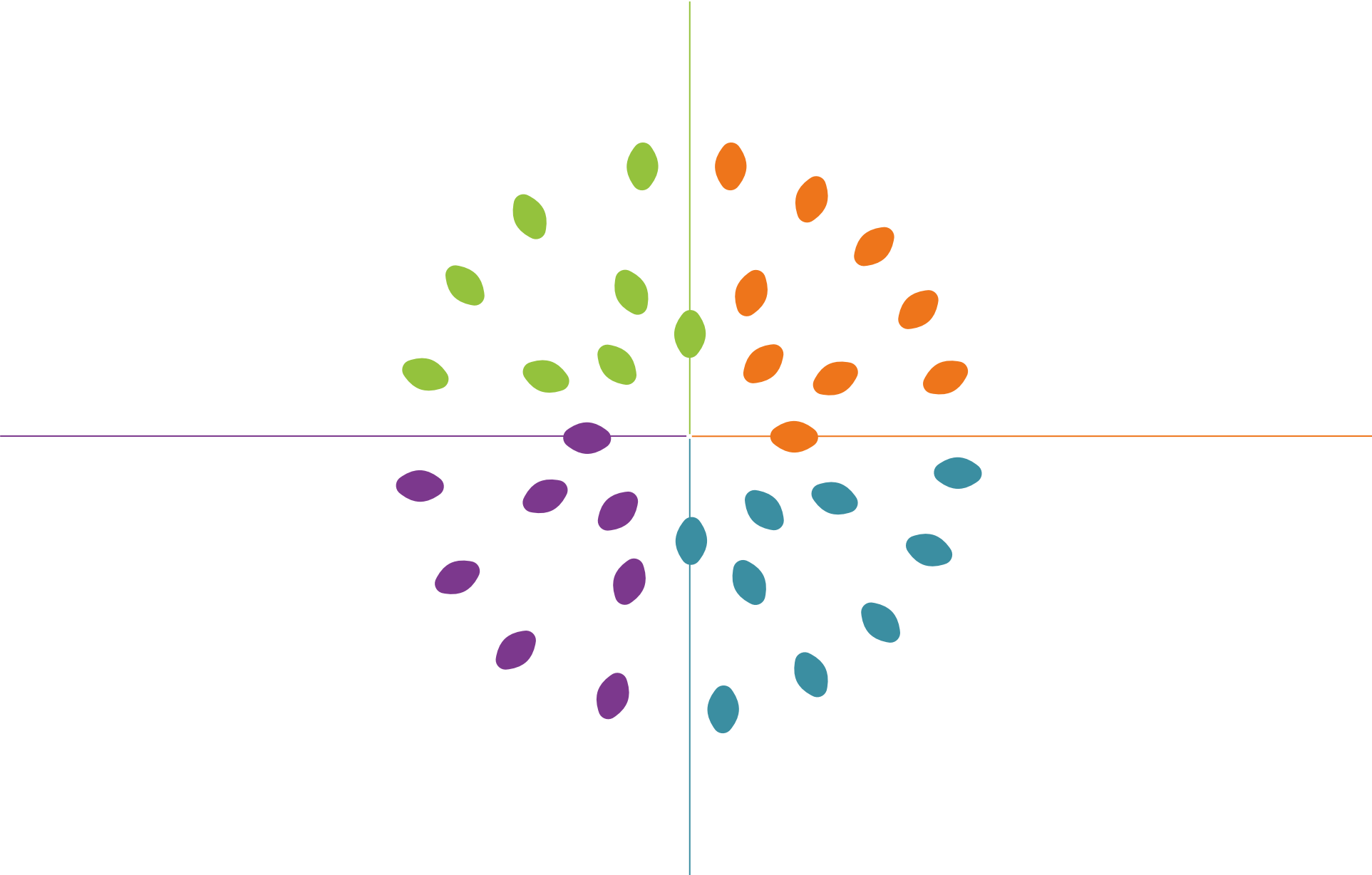
P. 3
4 strategic priorities at a glance

P. 4-5
FOCUS 1:
Improving the competitiveness of the seed industry

P. 6-7
AXIS 2:
Meeting the challenge of climate change and agro-ecological transition

P. 8-9
AXIS 3:
Promoting the industry's social responsibility, protecting and enhancing biodiversity

P. 10-11
AXIS 4:
Consolidating SEMAE's organisation to meet the industry's commitments



AXIS 1

IMPROVING THE COMPETITIVENESS OF THE SEEDS & SEEDLINGS INDUSTRY

The French seed industry is facing a reduction in production factors, the number of specialised farmers and available workforce. At the same time, international competition is likely to intensify, threatening France's seed sovereignty and leadership. It is therefore mandatory to improve the competitiveness of the industry by mobilising the collective improvement levers identified.

1

Securing production resources

The main collective challenges to securing the means of production include access to water and the development of alternative solutions to phytosanitary products, while minimising their impact on the environment ●



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2

Securing the network of growers

The profession is facing recruitment difficulties, both in terms of workforce and farmers specialised in the multiplication of seeds. These challenges are compounded by complex socio-economic, regulatory and climatic contexts.

Enhancing the attractiveness of the grower profession

Launched in 2024, the action plan to consolidate the network of growers and attract farmers in this profession will be rolled out regionally in 2025.

Deploying the results of technical actions to promote the development of seeds and seedlings multiplication

Faced with accelerating regulatory changes and the impact of climate change, we need to ensure the effectiveness of the technical solutions we propose. These solutions need to be quickly adopted by growers and technicians ●



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3

Promoting the value creation and contributing to its fair distribution



© Semae - Joao de Moura

To involve the various links in the value chain in seed production and distribution, a fair and transparent distribution of the value created is necessary.

Making the most of genetic progress to meet the challenges of agriculture and food production

The creation and development of varieties adapted to climate change is one of the major levers for meeting today's challenges. The benefits

of varietal creation, which is a long process, will be quantified by a study and promoted to industry players.

Ensuring fair remuneration for plant breeding

Plant breeding is essential to meet the challenges posed by seeds, such as the fight against pests and climatic stress. It must therefore be fairly remunerated by all the beneficiaries of genetic progress. In 2025, the Contribution Recherche et Inno-

vation Variétale en céréales - Contribution on research and variety innovation in cereals (CRIV) agreement will be renewed for three years ■

4

Promoting and filling jobs in the seeds and seedlings industry

With over 11,000 jobs in breeding and seed production companies, and 16,600 seed growers, the economic health of the industry depends on the recruitment of motivated and skilled personnel. In order to attract people to this sector, which is still little-known and little-taught, SEMAE will continue to communicate with information relays, employment and education bodies ■



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“

There can be no agriculture without seeds, whatever the species we grow. We need to get our act together again, to explain to the younger generations the strategic importance of seed production.”

Thierry Momont, Executive Vice President KWS

AXIS 2

MEETING THE CHALLENGE OF CLIMATE CHANGE

AND AGRO-ECOLOGICAL TRANSITION

In order to make a success of its agro-ecological transition and adapt to climate change, the French agriculture needs adapted seeds and varieties. France's food sovereignty depends on an innovative, forward-looking and proactive seeds and seedlings industry.



Meeting the challenge of climate change



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The range of plants cultivated and suitable for cultivation in France has always evolved, and is set to evolve considerably with climate change.

Integrating new species adapted to new climatic requirements

Numerous experiments are being carried out throughout France with new species such as chia and peanut. The interbranch organisation will identify the needs of user industries, consumption trends and the new species to be produced as

a priority, in order to define a regulatory framework adapted to their seeds and seedlings production.

Adapting seed production to climate change

The interbranch organisation will develop and strengthen tools to measure the impact of climate change on seed production of various species. It will make these tools available to all operators, to help them design local adaptation strategies.

Establishing the industry's carbon footprint in terms of seeds and seedlings flows

2

Supporting the agro-ecological transition of French agricultural sectors

As the first link in the value chain, the seed sector has a direct impact on French agricultural sectors through its orientations. It must therefore be attentive to changes and adapt to them.

Developing the contribution of the seeds and seedlings industry to support the agro-ecological transition of French agricultural sectors

The seeds and seedlings sector will adjust the criteria for registering varieties, and support the creation and promotion of approaches and reference systems that enhance the value of species and varieties suited to the agro-ecological transition.

It will promote varieties that use less plant protection products.

Promoting the development and use of service plants

The cultivation of service plants is recognised for their environmental relevance and plays a key role in agroecological approaches. To encourage their use and support the multiplication of those species, a global approach will be put in place to identify needs, develop research and promote their adoption. ■

3

Supporting and promoting an innovative technical and regulatory framework at French, European and international levels

Faced with changes in production conditions and the overhaul of the European regulatory framework, the industry needs to be involved in innovation and regulatory discussions.

Innovating the industry and transferring technical innovations

The seed industry is faced with major production issues. It is therefore necessary for breeders and processors to innovate in fields that have been little explored, if at all. SEMAE will support the French seed industry's need for innovation and collective research.

Supporting and promoting an appropriate European and international regulatory framework

The French seed industry exports more than half of its production and distributes French seeds and know-how in almost 150 countries. It is vital for the industry to defend its interests in the context of European (Plant reproductive material regulation, new CAP) and international (OECD1, UNECE2, IPPC3) regulatory developments ■



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I plant summer and winter intercrops, using different species. This prevents erosion and continues to improve soil life and organic matter levels. My farm has a low-carbon label, which means I use intermediate crops that capture CO2 and store it in the soil. ”

Stéphane Labat, farmer and ANAMSO⁴ member

¹ OECC: Organisation for Economic Co-operation and Development

² UNECE: United Nations Economic Commission for Europe

³ IPPC: International Plant Protection Convention

⁴ ANAMSO: Association Nationale des Agriculteurs Multiplicateurs de Semences Oléagineuses (National Association of Oilseed Growers)

AXIS 3

PROMOTING THE SECTOR'S SOCIAL RESPONSIBILITY, PROTECTING AND ENHANCING BIODIVERSITY

The actions taken by the industry to strengthen its contribution to the social debate will raise its profile and position SEMAE as a key player. By embodying expertise in seeds and seedlings, SEMAE will give greater coherence and impact to its communication.



Consolidating the sector's social responsibility

Responsible and committed, the seeds and seedlings industry is working to achieve continuous improvement in all regions and to meet the expectations of society and consumers.

Obtaining certification for the social responsibility of the seeds and seedlings industry

Certification will enable SEMAE and the industry to showcase their collective and individual commitments.

Participating in societal debates on agriculture and food issues

SEMAE is committed to integrating the seed issues into public debates and bringing the common positions of professionals to the attention of regional, national and European decision-makers.

Training new generations in the seed industry, its businesses and challenges

The industry is committed to meeting recruitment needs by training the younger generation.

Ensuring availability of seeds and a range of varieties suited to organic farming

The industry will ensure a good balance between supply and demand for seeds, including Organic certified seeds ●



2

Protecting biodiversity and enriching diversity

Maintaining, enriching, preserving and disseminating genetic diversity is possible thanks to the work of public research, genetic resources conservation associations, breeders, farmers and seed producers. Historically, breeders have taken care to conserve, describe and make freely accessible French genetic resources.

Supporting needs to preserve biodiversity and species diversity

The industry will continue to contribute to conserving genetic resources and expanding the range of varieties on offer. It will develop projects through calls for proposals or by participating in the Endowment Fund for the preservation of biodiversity of cultivated species.

Defending the diversity of players in seeds and seedlings conservation and production

The interbranch organisation will make proposals to public authorities to organise the conservation of plant genetic resources, based on the proposals of the CGAAER (General council for food, agriculture and rural areas)

report and its committee on societal issues.

Supporting the preservation of natural plant genetic resources in overseas France

SEMAE will identify local preservation players and support the deployment of local plants in French Guiana in particular, where there are very high natural values linked to Amazonia.

Promoting the seed industry's contribution to biodiversity

The seed industry, for which biodiversity is both the material and an end in itself, wishes not only to set up its efforts to promote biodiversity, but also to remove the obstacles to its spread and promote its commitment ●

© SEMAE - Alexandre Carré



“ Sustainability is unavoidable: we need to adapt to ensure that our business is conducted in the best possible conditions over the long term. Growers are also taking the necessary steps, in particular through agronomic innovations, to adapt their activity to local and environmental conditions and reduce their impact on the environment. ”

Marie Bigot, Public Affairs and CSR Manager, SEMAE

AXIS 4

CONSOLIDATING SEMAE'S ORGANISATION TO MEET THE INDUSTRY'S COMMITMENTS

The «Horizon 2024» strategic project, which included the internal transformation of GNIS into SEMAE, led to the adaptation of the interbranch organisation. From 2025 to 2027, the project aims to consolidate and optimise SEMAE's organisation to meet the commitments of the Seeds and Seedlings sector.

1

Modernising business support

Deploying within SEMAE a tool for managing jobs and skills

The interbranch organisation will complete the modernisation of the HR component by equipping SEMAE with a tool dedicated to the forward-looking management of jobs and skills.

Ensuring that SEMAE's teams are able to manage and deploy the service quality approach at national and regional level

A quality insurance process will be deployed as part of SEMAE's interbranch missions.

Continuing to modernise the information system

SEMAE will continue to modernise its control tools, digitise the various end-to-end processes related to its public service mission, and implement a modern and efficient Finance IS (information system) ●

2

Guaranteeing the balance and fairness of SEMAE's financing

From 2025, a review of SEMAE's financing agreement will be launched. The new agreement, applicable in 2027, should guarantee SEMAE's major balances between the different families ●



© SEMAE - Michael Augusto

3

Rolling out the territorialisation of cross-industry action

The interbranch organisation's actions will only be recognised and effective if they are backed up at local level by actions close to the players and decision-makers, with the involvement of regional professionals.

Establishing cross-industry action plans at regional level

SEMAE will initiate discussions on the development of regionally-funded industry plans.

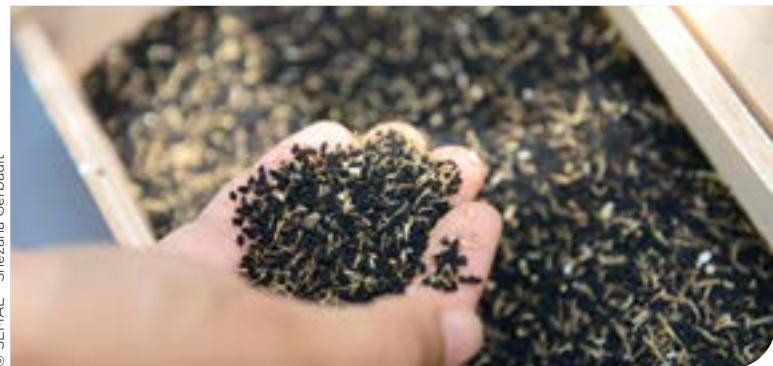
Providing information about the industry and the interbranch organisation in the regions

A system of feedback from the field will feed into national discussions and facilitate exchanges with the regional level of the seeds and seedlings industry.

national discussions and facilitate exchanges with the regional level of the seeds and seedlings industry.

Streamlining SEMAE's decision-making processes

To consolidate the coherence and richness of its actions, SEMAE will improve the fluidity of exchanges between the Board of Directors, the Sections, the transversal Commissions and the regional Collectives ■



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4

Renewing the commitment to a Contract of Objectives and Performance to carry out SEMAE's public service missions

The synergy between the public service mission and the other missions of the interbranch organisation must be accompanied by a clear independence, guaranteed by a transparent contract with the State.

This contract defines the objectives, resources and performance indicators for public service missions. The first Contract of Objectives and Performance (2022-2024) covered the control of the marketing, production and circulation of seeds and seedlings. In the first year, the need to overhaul the control system set up in 2008 was identified.

In fact, it was no longer adapted to the production environment, the control activities performed or the implementation methods. Deployment of this overhaul will continue between 2025 and 2027, as part of a new Contract of Objectives and Performance.

This contract will also serve to strengthen the coordination of SOC France's missions with the French government's national and international strategy ■



Since its creation, the interbranch organisation has hosted the public service mission of controlling the marketing of seeds and seedlings. SOC-France's teams carry out over 75,000 inspections a year, from seeds sampling to the evaluation of a complete production system. On average, 25 interventions happen a year at the premises of all operators authorised or declared as producing seeds or seedlings. The new Contract of Objectives and Performance (COP) signed on December 10, 2024 between the French government and SEMAE for a period of 3 years sets out our mission to serve the French seeds and seedlings production industry within a regulatory framework linked to quality and the guarantee of French seed sovereignty."

Anne-Laure Fondeur, Director of Official Control and Quality of Seeds and Seedlings, SEMAE

