

## EU Grass and Legume Seed Update to 2015

### Overview:

The European Union (**EU 28**) as a whole is one of 3 major grass and legume seed production regions in the world, the others being Oregon (USA) and western Canada. Eurostat, the statistical arm of the EU, updates grass and legume seed production within its member nations. This article covers the most current data available, 2015, and goes back to 2009. Some initial 2016 acreage data has also been reviewed.



### Please Note:

- Data from Italy and Hungary is **NOT** included as Eurostat includes imports in these two countries production numbers.
- The following crops' data were removed from the EU "grass and legume seed database" as our industry does not consider them as grass or legume seed species: fodder radish, yellow oatgrass, tall oatgrass, fodder kale, lopsided oatgrass, fenugreek, and swede. Some countries totals may include "fodder" seed production.
- Data has been converted to acres and millions of lbs. from hectares and metric tonnes.
- Data has been presented as received and converted, but due to the above factors, number totals may not always match.
- Be aware that specific data for some years' is not provided by the European Seed Certification Agencies Association (ESCAA) but included in table totals. (EG; EU totals may not account for additional species/excluded species)

### 2015 Production Data - Area

Total Grass and legume seed acres continue to expand in the EU, with **706,000 acres** reported in 2015. 2015 saw a jump of over 34,000 acres from the previous year. However, 2016 data (incomplete), already shows an additional 60,000 acres compared to 2015, with 4 more countries yet to provide their data. After hitting a recent acreage low of 585,000 acres in 2011, grass and legume seed acres have continued to rise. Initial 2016 acreage data shows Spain, France, the Czech Republic, Poland, Romania, Lithuania, and Greece all having an increase in grass and legume seed acres of over 10,000 acres since 2011. Total EU acres have grown by over 180,000 acres in that time span.

**Denmark** continues to lead the EU in grass and legume seed production, with over 160,000 acres in production in 2015. This total represented over 21% of all EU production. 2015 saw five other countries with over 50,000 acres in production, with Spain (89,000), France (78,000) and Poland (73,000) all showing over 70,000 acres of production. Germany (67,000) and the Czech Republic (55,000) were the other 2 countries with over 50,000 acres in production.

In terms of acres, **perennial ryegrass** (165,000 acres), **alfalfa** (92,000 acres) and **Westerwold ryegrass** (70,000 acres) were the 3 most widely grown crops in 2015.

EU Grass and Legume Seed Area 2009 - 2015 (acres)								
	2009	2010	2011	2012	2013	2014	2015	2016
Denmark	209,230	152,608	148,139	169,776	188,520	182,821	160,461	150,882
Spain	55,119	65,544	73,103	54,516	65,968	73,861	89,548	93,036
France	90,133	72,438	66,856	76,831	65,903	70,737	78,558	102,683
Poland	-	45,020	41,238	37,764	40,649	53,012	73,645	77,971
Germany	78,278	71,582	67,076	73,059	73,711	70,214	67,301	71,596
Czech Rep.	68,006	53,050	47,110	46,948	50,388	46,927	55,322	69,191
Sweden	29,310	32,407	32,396	31,668	28,315	31,938	34,757	38,724
Netherlands	43,819	31,007	26,467	35,680	31,451	30,387	32,034	31,288
Finland	21,264	20,636	20,467	19,607	19,828	18,290	21,316	24,160
Romania	6,534	5,281	4,896	5,236	6,217	15,484	18,814	15,889
UK	13,417	12,990	13,918	15,951	16,127	16,527	15,294	15,873
Norway	-	-	8,639	8,433	9,037	9,924	10,005	10,083
Lithuania	-	-	-	-	5,431	4,857	9,016	17,773
Latvia	4,432	3,905	4,229	5,209	5,754	5,068	6,590	8,792
Belgium	8,236	6,602	6,237	7,824	6,569	5,938	5,934	5,846
Estonia	3,369	4,051	3,945	3,836	4,336	4,817	4,529	5,891
Slovakia	5,528	4,067	2,879	2,441	3,164	3,566	4,385	4,326
Greece	9,677	9,439	3,870	2,852	3,507	16,175	4,180	14,149
Serbia	-	3,422	1,833	2,309	2,311	2,475	4,149	4,516
Portugal	922	697	959	1,195	1,933	2,434	3,049	-
Bulgaria	1,539	1,908	1,971	2,665	1,490	2,326	2,892	-
Austria	2,335	2,521	1,755	1,795	1,513	2,044	2,157	2,253
Switzerland	857	955	898	1,012	1,189	1,089	1,035	1,095
Croatia	-	1,261	1,038	944	974	1,283	958	946
Slovenia	397	281	280	223	134	226	151	-
Turkey	4,191	3,062	4,925	4,155	-	-	-	-
Ireland	355	-	-	-	-	-	-	-
<b>Totals</b>	<b>656,948</b>	<b>604,736</b>	<b>585,122</b>	<b>611,927</b>	<b>634,420</b>	<b>672,419</b>	<b>706,082</b>	<b>766,963</b>

Note: 2009 missing 5 countries input, 2010 missing 2 countries data, 2011 to 2015 missing 1 countries data. **2016 data incomplete as all countries have yet to provide input.**

### 2015 Production Data – Quantity by Country

In total, the EU 28 produced over 700 million lbs. of grass and legume seed in 2015. By far, **Denmark** produces the most seed in Europe. 2015 saw 283 million lbs. of seed come off Danish soil (40% of EU 28's total). No other country grew more than 60 million lbs. **Germany** was 2<sup>nd</sup> in production with 59 million lbs., while **France** saw 57 million lbs. of seed produced. Only 8 EU countries in total grew more than 10 million lbs. of grass and legume seed, with the other greater than 10 million lbs. of production countries being Spain, the Netherlands, Czech Republic, Sweden, and the UK.

In total, 2015 saw 575 million lbs. of grass and legume seed produced. This total represented a 21 million lb. Increased from 2014, and over 130 more than the low acreage year of 2011. With 2016 acres at a record high, production from 2016 could even surpass 2015 production numbers.



EU Grass and Legume Seed Production 2009 - 2015 (Millions of lbs.)							
	2009	2010	2011	2012	2013	2014	2015
Denmark	237.5	263.1	213.9	236.9	306.2	309.7	282.8
Germany	79.3	68.9	56.1	63.1	75.5	67.8	59.1
France	63.3	62.6	45.3	46.4	38.3	45.0	57.1
Spain	47.3	64.6	62.5	21.9	62.5	33.6	41.1
Netherlands	41.8	48.1	32.4	41.0	40.2	36.5	40.9
Czech Rep.	19.3	16.9	18.1	18.6	21.8	20.6	23.4
Sweden	14.8	16.9	14.6	13.4	15.5	18.3	17.2
UK	-	12.2	13.9	11.4	16.4	17.3	16.4
Romania	1.7	3.8	4.0	7.0	4.4	6.5	9.0
Finland	7.4	7.2	7.3	7.4	6.5	5.6	8.8
Poland	-	21.7	35.2	2.9	1.4	3.4	6.4
Belgium	9.0	6.5	5.1	6.8	8.0	5.3	6.1
Greece	10.2	8.9	1.7	1.8	1.2	3.2	6.1
Norway	-	-	2.3	2.9	3.0	5.7	5.5
Latvia	1.8	1.3	1.3	2.1	2.2	1.8	3.4
Serbia	-	1.4	1.2	1.5	1.6	1.0	2.9
Lithuania	-	-	-	-	1.0	1.0	1.9
Portugal	0.3	0.4	0.5	0.8	1.4	1.5	1.3
Estonia	-	0.7	0.6	0.7	1.2	0.8	1.1
Luxembourg	0.8	0.1	0.5	1.2	0.9	0.9	1.0
Bulgaria	0.7	0.6	0.7	0.9	0.7	0.4	1.0
Austria	0.6	0.9	0.7	0.6	0.7	0.7	1.0
Slovakia	1.0	0.5	0.2	0.4	0.8	0.6	0.8
Switzerland	0.3	0.3	0.2	0.3	0.4	0.3	0.4
Croatia	-	0.2	0.4	0.4	0.3	0.1	0.3
Slovenia	0.3	0.1	0.3	0.2	0.1	0.2	0.1
Turkey	4.1	2.8	3.4	-	-	-	-
Ireland	0.6	-	-	-	-	-	-
<b>Totals</b>	<b>580.2</b>	<b>657.7</b>	<b>553.7</b>	<b>545.0</b>	<b>673.5</b>	<b>654.6</b>	<b>675.7</b>

Note: 2009 missing 7 countries input, 2010 missing 2 countries data, Turkish data incomplete



Production of grass and legume seed in the EU's top three producing nations, (Denmark, Germany and France) varies greatly, with each country having a different number one crop (based on production). All 3 countries have perennial ryegrass seed as one of its top 3 crops. As well, Italian/Westerwold ryegrass stands in the top 5 of all 3 countries in terms of production. Total production of grass and legume seed from these 3 countries accounts for 67.7% (399 million lbs.) of the total EU production (589 million lbs).

Denmark: 2015 Grass and Legume Seed Area (acres) and Production (Millions of lb.)			Germany: 2015 Grass and Legume Seed Area (acres) and Production (Millions of lb.)			France: 2015 Grass and Legume Seed Area (acres) and Production (Millions of lb.)		
Crop	Mil. of lbs	Acres	Crop	Mil. of lbs	Acres	Crop	Mil. of lbs	Acres
Perennial ryegrass	144.7	65,673	Italian/Westerwold ryegrass	25.6	28,578	Lucerne/Alfalfa	9.9	31,258.9
Red fescue	67.4	41,157	Perennial ryegrass	14.6	13,165	Italian/Westerwold ryegrass	9.1	4,713.2
Smooth-stalked meadowgrass	19.2	14,420	Meadow fescue	4.1	5,023	Perennial ryegrass	8.6	5,173.3
Tall fescue	17.3	10,843	Red fescue	2.5	2,834	Common vetch	6.7	4,566.7
Italian/Westerwold ryegrass	6.8	2,707	Lucerne/Alfalfa	2.0	278	Cocksfoot	5.1	3,893.4
Festulolium	6.3	3,137	Timothy	2.0	2,217	Tall fescue	4.9	4,589.5
Cocksfoot	5.8	7,163	California Bluebell	1.6	1,014	Hybrid ryegrass	3.6	3,764.4
White clover	4.9	8,373	Red clover	1.6	6,217	Red fescue	3.1	2,042.0
Hybrid ryegrass	4.9	1,734	Sheep's / hard fescue	1.2	3,337	Red clover	3.1	13,649.9
Sheep's / hard fescue	2.0	1,890	Hybrid ryegrass	0.8	1,178	Crimson clover	2.0	3,512.4
Timothy	1.4	1,079	Other Crops (15)	3.2	3,461	Other Crops (15)	1.2	1,394.5
Meadow fescue	1.1	1,011	<b>Total</b>	<b>59.1</b>	<b>67,301</b>	<b>Total</b>	<b>57.1</b>	<b>78,558.2</b>
Other Crops (9)	1.0	1,274						
<b>Total</b>	<b>282.8</b>	<b>160,461</b>						

## 2015 Production Data – Quantity by Species

Perennial ryegrass seed production almost doubles the 2<sup>nd</sup> most widely grown EU grass and legume seed crop. It occupies 70,000 more acres than alfalfa seed, which is the 2<sup>nd</sup> most widely grown crop. Other crops with more than 50,000 acres of production include Westerwold ryegrass, red fescue, common vetch, and red clover. In terms of quantities produced, following perennial ryegrasses' 214 million lbs. of production, the EU seed red fescue (79.5 Million lbs.), Westerwold ryegrass (75 million lbs.), common vetch (42 million lbs.) and tall fescue (29 million lbs) rank 2<sup>nd</sup> to 5<sup>th</sup> respectively. Six other species had over 10 million lbs. of production. Of interest to Canadian growers, the EU had over 46,000 acres of timothy seed, producing over 22 million lbs. of seed. In total, EU 28 countries grew 41 various grass and legume species for seed.

EU Grass and Legume Seed Production by Species 2015 by Area (acres) and Production (mils. of lbs)			
Crop	Countries	Acres	Mil. of Lbs
Perennial ryegrass	18	165,696	214.5
Lucerne/Alfalfa	17	92,792	21.0
Italian/Westerwold ryegrass	21	70,615	75.2
Red fescue	15	59,883	79.5
Common vetch	16	58,848	42.1
Red clover	21	55,729	10.1
Timothy	16	46,230	22.2
California Bluebell	9	34,910	9.4
Tall fescue	14	25,841	29.4
Meadow fescue	17	22,851	11.7
Smooth-stalked meadowgrass	12	17,463	21.0
Hybrid ryegrass	13	16,729	13.5
Crimson clover	5	16,173	8.8
Cocksfoot	14	16,058	11.9
Meadow foxtail	4	12,298	0.1
White clover	11	11,829	5.9
Festulolium	9	7,764	8.8
Hairy vetch	8	4,069	2.0
Persian clover	2	1,916	1.1
22 other Species	n/a	5,947	7.1
<b>Total</b>		<b>743,641</b>	<b>595</b>

## Summary:

Grass and legume seed production in Europe continues to grow, with recent data showing 5 consecutive years of increased production area, with resulting increases in quantity produced. As production continues to rise, the need for imports from other grass and legume seed producing nations will fall. With the EU being very unique in regions and geographic areas, her needs for various amounts and types of grass and legume seed remains diverse, one should expect the EU to continue to grow a wide range of species to produce sufficient seed amounts for all her member nations.

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