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New Zealand

Planting Seeds

PLANTING SEEDS ANNUAL REPORT

1999

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Report Highlights: New Zealand is a net exporter of seeds, sending 43,059 MT of seed to foreign markets in 1997/98. White clover, ryegrass and vegetable seeds dominate exports. Opportunites for U.S. seed do exist - U.S. seed accounted for 28.5 percent of imported seed in 1997/98. No GMOs have been approved for general release in New Zealand, but there are numerous field tests and research institutions trialling GMOs under strictly controlled conditions. The first application for full release of a GMO is expected to be considered by ERMA this year.

Includes PSD changes: No
Includes Trade Matrix: No
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Wellington [NZ1], NZ

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SECTION I EXECUTIVE SUMMARY

The 1998/99 seed cropping season is expected to end with average yields following a second year of drought. Many farmers are entering into multiplication contracts for vegetable and canola seeds in an attempt to fix a portion of their returns and become less dependent on commodity seed markets. New Zealand amenity seed companies focus on breeding cultivars for specific situations and conditions, reflecting New Zealand's 12-month pasture-based production system and its reliance on low-input clover and ryegrass.

New Zealand is a net exporter of seeds, sending 43,059,888 kilograms of seed to foreign markets in 1997/98. Total seed shipments earned New Zealand seed exporters U.S.$51.9 million in the 1997/98 June year. White clover, ryegrass and vegetable seed exports dominate New Zealand seed exports. Key export markets include Australia, the United Kingdom, Belgium, Indonesia and Japan.

Total seed imports in the 1997/98 June year were 1,378,232 kilograms with a CIF value of U.S.$9.3 million. U.S. seed accounted for 28.5 percent or 393,337 kilograms of imported seed, consisting mostly of fescue, vegetable and ryegrass seed.

Genetically modified organisms (GMO) are governed by the Hazardous Substances and New Organisms Act (HSNO). The Environmental Risk Management Authority (ERMA) considers applications for the introduction of GMO's, a process which includes public consultation rounds. No GMO's have been publicly released in New Zealand yet, but field trials of potatoes, petunias and rapeseed, among others, have been approved. The first application for full release is likely to be considered this year. Information on ERMA and its approval activities may be obtained at the following internet site www.ermanz.govt.nz.

SECTION II STATISTICAL SECTION

NZ SEED CERTIFICATION STATISTICS						
		1996-97		*1997-98*		*1998-99*
Species		***Area (ha)***	***Volume (kg)***	***Area (ha)***	***Volume (kg)***	***Area (ha)***
Barley		1,809	3,625,754	1,188	4,278,965	1,135
Oats		380	851,960	306	542,865	325
Wheat		1,969	4,746,801	1,234	4,607,845	1,299
Pea		245	639,291	384	928,580	336
Browntop		409	72,265	484	106,510	448
Cocksfoot		1,014	570,227	376	248,279	454
Chicory		167	38,332	151	39,406	4
Crested Dogstail		77	20,225	0	8,500	336
Tall Fescue		361	135,582	558	249,534	780
Ryegrass	Hybrid	1,381	1,654,731	1,984	1,849,313	2,062
	Italian	4,077	3,070,548	3,064	2,010,300	3,230
	Perennial	11,639	11,188,090	13,904	12,723,044	16,635
Clover	Red	1,366	232,360	832	143,921	974
	White	15,366	4,996,226	13,846	4,772,743	11,340
Prairie Grass		381	557,649	270	115,370	116
Alfalfa		67	14,762	41	6,274	31
Brassicas		881	945,736	356	389,308	1,469
Other		996	1,605,069	907	1,857,616	1,903
TOTAL		42,585	34,965,608	39,885	34,878,373	42,877
Source: MAF Seed Testing Station, Palmerston North						

TRADE MATRIX 1997/98 June Year Data

N.Z. ALFALFA SEED TRADE 1997/98				
Source/ Destination	*I M P O R T S*		*E X P O R T S*	
	Kilograms	*US$000 CIF*	*Kilograms*	*US$000 FOB*
U.S.	57	0	0	0
Australia	65,825	203	0	0
Other	0	0	580	0
Total	65,882	203	580	0
N.Z. CLOVER SEED TRADE 1997/98				
U.S.	10,000	85	486,075	1,315
Australia	64,255	146	296,864	922
U.K.	0	0	780,122	2,599
Belgium	0	0	372,515	1,126
France	0	0	265,686	801
Italy	0	0	296,117	687
Japan	0	0	250,604	624
Other	5,692	48	1,493,407	3,866
Total	79,947	279	4,241,390	11,940
N.Z. FESCUE SEED TRADE 1997/98				
U.S.	165,230	389	22,498	35
Australia	0	0	244,990	463
Other	18,294	39	4,445	19
Total	183,524	428	271,933	517
N.Z. RYE GRASS SEED TRADE 1997/98				
U.S.	89,132	226	4,168,377	4,444
Australia	4,908	8	2,549,174	3,945
Chile	0	0	1,022,520	1,300
Italy	0	0	459,689	482
Germany	400	3	464,647	551
Re-imports	28,527	35	0	0
Other	15,334	89	2,289,535	2,891
Total	138,301	360	10,953,942	13,613

N.Z. KENTUCKY BLUE GRASS SEED TRADE 1997/98				
Source/ Destination	*I M P O R T S*		*E X P O R T S*	
	Kilograms	*US$000 CIF*	*Kilograms*	*US$000 FOB*
U.S.	5,151	19	0	0
Total	5,151	19	0	0
N.Z. TIMOTHY GRASS SEED TRADE 1997/98				
Australia	0	0	100	0
Canada	45,550	47	0	0
Total	45,550	47	100	0
N.Z. OTHER GRASS SEED TRADE 1997/98				
U.S.	31,258	76	559,232	852
Australia	6,955	30	83,736	165
Argentina	0	0	125,971	152
Germany	0	0	50,682	80
Other	31,906	148	173,115	550
Total	70,119	254	992,736	1,798
N.Z. VEGETABLE SEED TRADE 1997/98				
U.S.	92,509	1,080	85,363	581
Thailand	4,584	43	755,698	1,277
Taiwan	5,188	24	684,803	894
Hong Kong	939	1	496,029	777
Australia	153,331	1,157	205,571	523
Other	130,670	4,485	1,432,109	6,208
Total	387,221	6,790	3,659,573	10,260

N.Z. LEGUMINOUS VEGETABLE SEED TRADE 1997/98				
Source/ Destination	*I M P O R T S*		*E X P O R T S*	
	Kilograms	*US$000 CIF*	*Kilograms*	*US$000 FOB*
U.S.	74,229	182	521,168	897
Australia	115,354	85	2,684,467	3,107
Belgium	0	0	3,321,970	1,854
India	8,680	7	1,634,000	604
Indonesia	0	0	1,744,855	478
Japan	1,100	3	1,660,386	800
Malaysia	0	0	1,625,184	580
South Africa	0	0	1,182,341	597
Thailand	55	0	1,305,246	494
U.K.	0	0	1,965,299	1,215
Other	21,646	77	5,288,607	3,119
Total	221,064	355	22,933,523	13,745
N.Z. Field Corn Seed Trade 1997/98				
U.S.	150,577	498	0	0
France	6,886	100	2,374	53
Australia	23,500	22	3,736	23
Other	511	3	0	(0)
Total	181,474	623	6,110	76
N.Z. TOTAL SEED TRADE 1997/98				
All Countries	1,378,232	9,391	43,059,888	51,949

Source: Statistics New Zealand.

Average June Year $US:NZ Exchange Rate	
1995/96	0.6671
1996/97	0.6970
1997/98	0.6089
1998/99f	0.5500

Source: Average Reserve Bank mid-rates.

SECTION III MARKETING, POLICY & PRODUCTION

MARKETING

Market Development Opportunities

The New Zealand seed industry is open and very much attuned to the international market. New Zealand will remain a small volume buyer of seeds on the international market due to significant domestic production. The industry relies on international cooperation in numerous research projects and has an extensive network of foreign companies involved in joint research and marketing projects. The greatest opportunity for U.S. exports to New Zealand exists in the sale of proprietary forage grasses. New Zealand does have some problems producing certain seed types in sufficient purity, so niche opportunities exist for specialist turf applications (especially late flowering varieties), vegetables, and grains (cool climate corn for silage). Opportunities also exist for cereal seeds in New Zealand.

Developing relationships with local grain and seed merchants may be a useful approach to the N.Z. market for U.S. seed marketers. This would most likely occur through the testing of U.S. grass seed strains on merchants' research farms. Contacts for the major seed companies are listed in the "Industry Contacts" section of this report.

Marketing Channels and Facilities

The New Zealand industry is stable and mature. There are large numbers of small companies and 4-5 large companies servicing both the domestic and export markets. At present there are six large companies specializing in seed production and trade. They are Wrightson Seeds, N.Z. Agriseeds, Hodder & Tolley, Pyne Gould Guiness, AB Annand and N.Z. Agricom.

Due to the high costs associated with the development and promotion of seed types, there has been a trend in the industry towards a degree of specialization by seed companies. It is estimated that development of any new seed cultivar through to the marketing stage costs N.Z.$1 million (U.S.$550,000). New Zealand seed companies continue to focus efforts on developing cultivars to meet specific objectives and situations, as farmers demand greater animal productivity.

There is an increasing trend for grain and seed buyers/processors to contract growers with larger production areas with experience in management systems to minimize supply risk and ensure targeted quality specifications are met. This will also decrease the overall transaction costs for procurement.

Competitor Activities

New Zealand continued to export to a variety of countries. Ryegrass, clover and leguminous vegetable seed exports dominate exports. New Zealand's total seed trade reached 43,059,888 kilograms in 1997/98, worth nearly U.S.$52 million FOB. As a net exporter of seeds, New Zealand is likely to be a competitor to the U.S. seeds industry in third-country markets. The United States took 13.5 percent (by volume) of New Zealand's seed exports in 1997/98, predominantly ryegrass seed. Other key export markets for New Zealand include Australia, the United Kingdom, Belgium, Indonesia and Japan. Seed exports in 1998/99 are expected to remain steady despite weak international prices.

N.Z. seed imports increased 9.2 percent in the 1997/98 June year to 1,378,232 kilograms worth U.S.$9.3 million value CIF. The U.S. accounted for 28.5 percent or 393,337 kilograms of New Zealand's imports, mostly fescue, vegetable and ryegrass seed.

Domestic demand for seed is led by farm activity levels, especially the dairy sector. Seed merchants report that demand for seed has picked up after substantial drought-breaking rains fell about three weeks ago. High demand has been reported by seed merchants in the Waikato and Central Otago regions as farmers take advantage of the warm, wet conditions to plant quick growing ryegrass and green feed crops. Farmers are expected to re-sow drought damaged pastures in the New Zealand spring (September).

POLICY

Biotechnology Policy

All genetically modified organisms (GMO) are classed as "new organisms" under the Hazardous Substances and New Organisms Act (HSNO) unless they have been approved for release previously. The Environmental Risk Management Authority (ERMA) considers applications for the introduction of hazardous substances and new organisms into New Zealand. If approval is given for development in containment, further approval must be given before the GMO can be released. ERMA is responsible for monitoring compliance with conditions attached to approved applications. Genetically modified plants such as rapeseed, maize and potatoes are already being field tested in New Zealand. However, full release of a GMO has not yet occurred.

- Importation of New Organisms

All persons wishing to import for release, or import/develop in containment, any new organism or GMO need approval under HSNO. However, many approvals will not come from ERMA directly. Decisions on low-risk GMOs in secure containment can be made through a rapid assessment process. These decisions may be delegated to Institutional Biosafety Committees (IBSCs) established by research organizations. The committees must keep detailed records, and report their actions to ERMA New Zealand. Applications for the low-risk operations are not publicly notified.

Applications for the importation or development in containment of GMOs considered to be of greater risk, or for any release or field testing of GMOs, must be publicly notified. After notification, anyone may make a submission. ERMA may call for further information if it believes this is necessary. A hearing will be held if the applicant or any of the submitters request one, or if ERMA thinks one is necessary. After the hearing, ERMA will decide on the application and publicly notify its decision.

If an application is made for an approval that will have significant effects or consequences, the Minister for the Environment may "call in" the application for decision. In these cases the Minister may appoint additional members to ERMA if additional expertise is needed. ERMA will deal with the application in the same way as other notified applications but, instead of deciding on the application, will prepare a report to the Minister who will make a final decision.

- ERMA New Zealand's Approach

When considering an application to develop, field test or import a GMO, ERMA's first obligation is to fulfil the purpose of the HSNO Act - to protect the environment and the health and safety of people and communities. ERMA must take into account:

- the sustainability of all native and valued introduced flora and fauna;
- the intrinsic value of ecosystems;
- public health;
- the relationship of Maori culture and traditions with their ancestral land, water, sites, valued flora and fauna;
- the economic and related benefits to be derived from the organism; and

- New Zealand's international obligations.

The HSNO Act requires that anyone making decisions under the Act take into account the need for caution if there is scientific to technical uncertainty about the adverse affects of the organism. Particular caution is needed when deciding on the release of a GMO into the environment. When however, an application is made to develop an organism in containment, or import it into containment, the issues to decided are likely to be defining containment conditions to prevent the GMO escaping, as well as effectively managing the risks of the organism.

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Source: ERMA Information Sheet No 2, October 1998.

Plant Health Regulations

Import protocols are targeted to reduce the risk of introduction of both insects and diseases. As an island nation New Zealand does not have many of the agricultural pests present in other countries, and therefore protects this status. All consignments must be accompanied by a phytosanitary certificate, and are likely to undergo a MAF inspection, with treatments required if pests or diseases are identified. All imported seed shipments must comply with the following Basic Conditions:

< Cleanliness - All seeds must be in clean, new packages.
< Labeling - Each type of seed in the consignment must be clearly identified by its botanical name to species level.
< Phytosanitary Certificate.

MAF Regulatory Standards for the importation of seeds for sowing into New Zealand are available on the MAF website located at http://www.maf.govt.nz. To reach the import standards for seeds for sowing:

< Select: Standards.
< Use the pull-down menu to select: Plant & Plant Products
< Select: Plant Imports.
< Select: Import Health Standards for Nursery Stock and Seeds.
< Download the PDF file: Standard 155.02.05.

- Import Health Standard for Zea Mays Seeds

The New Zealand Ministry of Agriculture and Forestry approved an Import Health Standard (IHS) for Zea mays seeds for sowing from the United States on March 10, 1999. This includes maize, sweetcorn, popcorn, Dent's corn, field corn, flint corn and pod corn. The conditions for importation are effective from the date the IHS was approved. A dispensation has been granted for seed grown during the last season (1998) in the United States for High Plain Virus only. The endorsement for High Plain Virus will not be required for last seasons harvest.

Please note that crops being grown during the coming season (April-May 1999) and in the future will require the additional declaration for High Plain Virus as well for all the other pests as stated in the IHS.

Seed Certification

The N.Z. seed certification standards are based on the Organization for Economic Cooperation and Development (OECD) and the Association of Official Seed Certifying Agencies (AOSCA) standards, and are administered through AgriQuality (a State-owned enterprise) through a single seed-testing station in Palmerston North. The N.Z. Seed Quality Management Authority (Inc) is responsible for setting seed testing regulations, in terms of specific allowable levels of contamination/germination etc for N.Z. seed. Members of the N.Z. Seed Quality Management Authority (Inc) represent seed breeders, growers, and merchants. Approximately 65 percent of seed production is certified, and the majority of exports are certified seed, although uncertified seed is also exported.

Intellectual Property Rights

Intellectual property rights for plants in New Zealand are covered by the Plant Variety Rights Act 1987. New cultivars are registered with the Plant Varieties Office and must undergo trials to prove their distinctiveness and uniformity. The Ministry of Commerce regulates the PVR legislation, and has powers through the Act to prosecute seed merchants for selling PVR seed without payment of a royalty to the plant breeder. PVR regulations have encouraged grain and seed merchants to develop their own proprietary varieties as they can earn greater profits by collecting the royalty and commission for themselves. Briefly, the New Zealand Plant Variety Rights Act 1987 includes:

< A breeder of a new plant variety may obtain exclusive control over selling reproductive material or plants of that variety by obtaining a grant of plant variety rights.
< Breeders who obtain plant variety rights may:
- License others to commercialize varieties.
- Bring civil action against anyone infringing their plant variety right.
< In most cases the term of protection is for 20 years, or 23 years in the case of woody plants.
< Plant variety rights may be obtained for varieties of any kind of plant except for algae and bacteria and can only be granted to new, stable and distinct variety for which the breeder has proposed an acceptable name.
< A decision as to whether or not to grant plant variety rights will be based upon an assessment of the plants of the variety in a growing trial.

- Growers Want Right to Save Seed

Farmer lobby group Federated Farmers is calling for “farm-saved” seed to be included under a revised Plant Variety Rights Act. Many arable farmers save a portion of their own crop for subsequent sowing the following season because the Plant Variety Rights Act does not specifically ban the practice. By farm-saving seed, farmers can assure supply of a specific cultivar, and be confident of the quality of that seed. Farm-saved seed is also less expensive than commercially available seed. In saving their own seed, farmers also avoid paying the seed breeding royalties usually levied on this seed. Farm-saved seed has led to a situation where, due to the loss of royalties, breeders are being shut out of a return for their investment efforts. Federated Farmers believes that provision must be made for farm-saved seed under the Plant Variety Rights Act, but consider that royalties should be paid on such seed. The lobby group believes farmers must accept supplier requests that seed not be farm-saved. This situation is becoming more common as end-user contracts are being increasingly utilized.

- Court Action Over Pirated Seed

Wrightson Limited, a farm service and supply company, has warned it will take legal action over sales of pirated sales of its Concord ryegrass seed. Wrightson claims that companies and individuals in New Zealand and Australia were involved in the illegal growing, harvesting and selling of the company's proprietary seed, Concord ryegrass. Wrightson has initiated court action against two South Island (N.Z.) companies. The maximum penalty under the Plant Variety Rights Act 1987 is N.Z.$1,000 (approx. U.S.$550), but Wrightson could get much more through exemplary damages. A recent example was an out-of-court settlement of N.Z.$38,000 (U.S.$20,900) and a public apology.

Variety Approval

There is no longer a formalized procedure in place for evaluating cereal cultivars in N.Z., and as such, cultivars are not required to be "approved" before they can be grown.

For spring trials in 1998 and for both spring and autumn trials from 1999, two separate evaluation systems are being undertaken. The Foundation for Arable Research (FAR) conducts cultivar management trials where commercial and near commercial cultivars of wheat and barley are trialed throughout the South Island and lower North Island. A small number of those cultivars each year are exposed to a range of management treatments (e.g. Fungicides, nitrogen, times of sowing) in order to learn more about the agronomic merits of those cultivars. FAR also funds other research (disease nurseries, sprouting nurseries, etc,) aimed at increasing the agronomic information available on cultivars.

A group comprising the four major plant breeding companies is known as NZCT (NZ Cereal Trials). They do comparative trials of pre-commercial cultivars with some commercial cultivars as standards. Similar agronomic information is recorded from both sets of their trials. FAR publish the results of their trials as part of their normal information transfer, while NZCT results are only available to participating members.

Tariff & Non-tariff Barriers

The tariff rate for all imports of seeds classified as "for sowing" is zero. The only barriers to seed exports from the U.S. to New Zealand are phytosanitary in nature. Import protocols are targeted to reduce the risk of introduction of both insects and diseases. As a remote island nation, New Zealand does not have many of the agricultural pests present in other countries, and therefore rigorously protects this status. All consignments must be accompanied by a phytosanitary certificate, and are likely to undergo a MAF inspection, with treatments required if pests or diseases are identified.

PRODUCTION

The N.Z. seed production industry is comprised of two broad groups of seed producers. The first and largest group includes those farmers for whom seed production is a specialist activity where seed yields and genetic integrity are foremost to profitability. These growers tend to operate on larger properties in the fertile irrigated plains of mid-Canterbury (South Island) and produce proprietary seeds on contract for the cultivar owner/marketer. Such specialist growers tend to have capital investments in seed harvesting and drying equipment. The second group of farmers use seed production as part of their crop rotation and livestock enterprises. Grass seed (usually clover or ryegrass) is planted in Autumn (late January to March) after harvesting cereals for winter pasture. In Spring the farmer will decide whether to leave the field for seed production or to graze it for lamb production. The grass types tend to be "commons" for which no royalty is collected.

Arable farmers with irrigation report a good production year with average yields. An estimated 40-50 percent of

mid-Canterbury arable farmers have irrigation, whereas just 10 - 15 percent of south Canterbury arable farmers have irrigation. Mid-Canterbury farmers with irrigation were experiencing average to below average yields, with mixed clover crop yields. Ryegrass quality was looking better than last season while brassica and radish crops were also doing well. Drought conditions have hit dryland (no irrigation) cropping farmers for the second year in a row resulting in poor yields and quality problems. Crop yields are reported as generally better than last year, but contract prices were lower for some crops and will be reflected in growers returns. Some dryland grass seed crops were more than 40 percent down on a normal year. Ground that usually produced 1,200 kg/ha were yielding 700 kg/ha to 800 kg/ha this year. One of the biggest problems has been light seed as a result of low rainfall.

Vegetable seed multiplication in Canterbury is forecast to grow following the opening of a new seed complex at Methven by South Pacific Seeds. Vegetable seed multiplication has shown encouraging returns for growers at a time when other crop returns were falling. A full range of Asian and European vegetable seed crops were being grown for export. These included radish, spinach, pak choi and other Chinese cabbages, cauliflower, European cabbage, red beet and carrots. Although vegetable seed multiplication required more inputs and attention, they still produced a higher return per hectare than normal commercial crops.

Canola seed production is also growing in popularity as a result of Ashburton seed marketer Cropmark and Canadian company Zeneca Seeds. Cropmark is contracting farmers to grow canola for Zeneca, involving hundreds of hectares in North Canterbury, Mid Canterbury and Southland. New Zealand's climate is ideal for canola and the counter-seasonal timing of the Southern hemisphere means the crop is sown in N.Z. early-mid October and harvested in February, ready for sowing in Canada by May. Exports of canola seed in 1998/99 will be down due to drought conditions reducing production.

Estimated N.Z. Seed Production by Region (percent)	
South Island:	
Nelson/Marlborough	1
Nth Central Canterbury	22
Mid Canterbury	54
Sth Canterbury/Nth Otago	18
Otago/Southland	2
North Island:	
Manawatu	3
TOTAL	100

Arable Levy Funds the Foundation for Arable Research

The Canterbury-based Foundation for Arable Research (FAR) is a farmer organization funded by levies set up to promote near-farm research that will add value to arable farming. Most of the research is contracted out, FAR only has a small staff who are mainly concerned with managing the research and undertaking information transfer. Herbage and amenity seeds provide 20-30 percent of FAR's income, but the foundation also receives a

levy monies from wheat barley and other cereal crop growers. In return for the levy, growers receive monthly newsletters and research information. In terms of technology transfer, FAR regularly holds field-days and seminars which are reported to be well attended.

The Commodity Levies (Arable Commodities) Order 1994 requires that a levy for research be paid on all first point of sales, or at seed testing for, all arable crops. The levy is deducted and paid to FAR. Levy rates for the 1999 season are set at 0.4 percent of the assessed sale value, except for yarrow, plantain and chicory where a levy of 0.1 percent is applied.

Producers, Processors Create Lobby for Arable Foods

Producers and processors of arable food, feeds and seeds have formed the Arable Food Industry Council (AFIC) with representatives of nine organizations representing growers, grain merchants, millers and feedmillers, other processors and researchers. AFIC will discuss collective issues such as industry and research strategies. It will also present industry views to local and central government on issues such as biotechnology, biosecurity, environmental issues and quality assurance. The council's vision for 2010 was of a customer driven, specialist, flexible and knowledge intensive arable industry.

Members of the council include: Grains Council of Federated Farmers, Grain and Seed Trade Association, Plant Breeding and Research Association, Foundation for Arable Research, Flourmillers Association, Feed Manufacturers Association, AgResearch, Crop & Food Research and United Wheatgrowers.

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