

# DAFFMinor Crop Stakeholders Workshop 2018

SANSOR Vegetable Seed Priorities  
– Seed Treatment Chemicals

# South African Vegetable Seed Industry

- Divided into
  - Professional Vegetable Producers (sales to commercial farmers)
  - Vegetable packet or hobby market (retail sales)

# Seed sales to Professional Vegetable Producers



# Vegetable Retail Packet - Hobby Market



# What is the Hobby Market?

- Vegetable, herb, flower and lawn grass seed sold in small quantities suitable for home gardeners.
- All the main seed companies involved in this sector have a very wide product range probably more than 300 products each.
- Seed is sold in pre-printed packets which typically illustrate the end product and also include planting instructions often in the form of a pictogramme.
- Some packet ranges include a best before date
- All include prescribed information: Kind, variety and lot number. Seed weight is usually not included as there is an exemption for seed sold to this segment.
- Seed quantities vary even within a specie because packet prices (rather than grams per packet) are consistent. Seed companies generally put a sensible quantity of seed in a packet, taking many factors into account.

## Hobby – retail packet market

- Not all seed packets contain treated seed. A large percentage is untreated.
- The purpose of chemicals applied to seed in this segment is primarily to limit the effects of the pathogens causing damping off – such as *Pythium* and *Rhizoctonia* species.
- It is almost impossible to estimate the hectares planted since many packets are purchased with good intentions but which never actually get planted.
- Packing runs take economy of scale into account and are generally many thousands of packets.
- Empty packets are often printed in large quantities well ahead of time.
- Seed companies hold a lot of stock of both filled and empty packets.

# Vegetable Seed Market Size Measured in ZAR (as per SANSOR stats for 2016)

	Local			Export			Grand Total
	OP	F1	Total	OP	F1	Total	
<b>Total Horticulture 2016</b>	249,370,000	671,960,000	921,330,000	126,814,000	92,082,000	218,896,000	1,140,226,000
Packets only - Hobby Market	80,252,094	3,396,693	83,648,787	23,616,405	1,361,402	24,977,807	108,626,594
Professional Growers	169,117,906	668,563,307	837,681,213	103,197,595	90,720,598	193,918,193	1,031,599,406





# Comments on the **range** of chemicals used

- Seed for commercial farmers – wider range of chemicals used.
- Seed for hobby / retail market – thiram most common (almost the only chemical used currently)

# Factors to consider in relation to labelling in the vegetable seed industry

- A reasonable phase in period is required to facilitate a wording change on packets. In the case of the hobby market there are large stocks of both empty and filled packets throughout the supply chain.
- Not enough space on retail packets for too much wording
- Any changes to labelling requirements could be implemented on new print runs and on new packing operations without much delay, however a phase in period of at least 5 years would be required for all stock throughout the supply chain to be changed.
- The number of chemicals currently used is relatively small considering the wide range of vegetables sold.
- Note that the professional vegetable seed market is more flexible than the retail /hobby market in terms of changes to packaging since packing runs are much shorter and stock levels are lower.

TRADING Crop	Local			Export			Grand Total
	OP	F1	Total	OP	F1	Total	
Asparagus	16,000	8,000	24,000	-	2,000	2,000	26,000
Bean green (garden)	33,931,501	-	33,931,501	7,398,942	-	7,398,942	41,330,443
Bedding Plants	2,300,000	8,616,000	10,916,000	-	-	-	10,916,000
Beet root	4,162,103	15,269,000	19,431,103	2,926,081	864,582	3,790,663	23,221,767
Broad bean	68,000	-	68,000	2,000	-	2,000	70,000
Broccoli	(3,906,000)	17,015,501	13,109,501	-	652,150	652,150	13,761,650
Brussels Sprout	173,528	481,000	654,528	-	-	-	654,528
Bunching onion	764,399	394,000	1,158,399	273,927	-	273,927	1,432,326
Bunching onion (new cfc)	-	-	-	-	-	-	-
Cabbage (various)	962,507	28,098,873	29,061,379	5,185,413	17,100,846	22,286,259	51,347,639
Carrot	4,208,744	82,478,000	86,686,744	5,750,187	3,705,655	9,455,842	96,142,586
Cauliflower	31,394	16,857,000	16,888,394	150,380	534,520	684,900	17,573,294
Celery	(287,022)	838,000	550,978	68,000	-	68,000	618,978
Coriander	2,729,000	374,000	3,103,000	471,000	-	471,000	3,574,000
Cucumber (field)	790,202	2,241,997	3,032,199	1,875,904	147,000	2,022,904	5,055,103
Cucumber (tunnel)	1,000	34,646,000	34,647,000	-	980,710	980,710	35,627,710
Curly Kale / Borecole	338,126	49,000	387,126	496,614	-	496,614	883,740
Cut Flowers	360,000	2,136,000	2,496,000	-	-	-	2,496,000
Eggplant / Brinjal	208,761	1,123,000	1,331,761	234,839	25,899	260,738	1,592,500
Flower (professional)	-	-	-	-	-	-	-
Flowers (packets)	14,437,000	-	14,437,000	1,822,000	-	1,822,000	16,259,000
Grass (professional)	9,538,000	-	9,538,000	1,627,000	-	1,627,000	11,165,000
Kohlrabi	109,000	24,000	133,000	-	-	-	133,000
Lawn (packets)	14,256,000	-	14,256,000	2,693,000	-	2,693,000	16,949,000
Leek	2,372,000	267,000	2,639,000	5,066,854	-	5,066,854	7,705,854
Lettuce (encrusted)	3,300,000	-	3,300,000	702,000	-	702,000	4,002,000
Lettuce (naked)	1,497,126	-	1,497,126	1,534,009	-	1,534,009	3,031,135
Lettuce (pelleted)	49,568,000	-	49,568,000	424,000	-	424,000	49,992,000
Onion (Intermediate)	6,070,948	22,379,000	28,449,948	4,630,077	3,553,870	8,183,948	36,633,896
Onion (Short day)	6,711,034	91,726,304	98,437,338	43,873,778	18,562,381	62,436,159	160,873,498
Other horticultural crops	1,861,000	2,573,000	4,434,000	138,000	9,000	147,000	4,581,000
Parsley	217,000	161,000	378,000	5,000	-	5,000	383,000
Pea (garden)	5,667,231	-	5,667,231	906,915	-	906,915	6,574,146
Pepper (hot)	1,185,325	4,631,791	5,817,115	111,599	1,195,274	1,306,873	7,123,988
Pepper (paprika)	967,000	-	967,000	-	-	-	967,000
Pepper (sweet)	1,475,607	60,540,000	62,015,607	2,852,445	1,389,544	4,241,990	66,257,597
Pumpkin	1,155,738	18,716,999	19,872,737	365,836	6,101,766	6,467,602	26,340,339
Radish (garden)	337,254	383,000	720,254	16,115	-	16,115	736,369
Rape	941,167	-	941,167	2,323,452	9,000	2,332,452	3,273,619
Spinach	463,052	5,540,585	6,003,637	174,865	65,678	240,543	6,244,179
Squash (Butternut)	7,552,158	56,008,000	63,560,158	1,568,335	3,414,854	4,983,188	68,543,346
Squash (Gem squash)	473,655	9,188,084	9,661,739	17,314	316,859	334,173	9,995,912
Squash (Hubbard)	1,103,232	1,317,431	2,420,663	496	-	496	2,421,159
Squash (Zucchini & patty pan)	199,000	21,629,863	21,828,863	54,000	5,803,279	5,857,279	27,686,142
Sweet Corn	280,000	22,696,019	22,976,019	464,000	4,374,515	4,838,515	27,814,534
Sweet Melon	29,037	17,515,000	17,544,037	19,949	325,000	344,949	17,888,986
Swiss Chard	6,974,425	254,000	7,228,425	2,150,660	-	2,150,660	9,379,085
Tomato (Determinate round)	4,223,828	11,815,397	16,039,224	2,082,968	4,128,758	6,211,726	22,250,950
Tomato (Determinate saladette)	177,269	12,835,877	13,013,146	1,915,642	5,806,039	7,721,681	20,734,827
Tomato (Indeterminate round)	84,000	53,696,000	53,780,000	154,000	4,265,792	4,419,792	58,199,792
Tomato (Indeterminate saladette)	14,000	12,042,000	12,056,000	-	4,372,994	4,372,994	16,428,994
Tomato (Novelty)	63,207	16,645,053	16,708,260	3,832	93,335	97,168	16,805,428
Tomato (Processing)	27,000	2,033,000	2,060,000	2,885,394	554,653	3,440,047	5,500,047
Veg & Herbs (packets)	51,559,094	3,396,693	54,955,787	19,101,405	1,361,402	20,462,807	75,418,594
Watermelon (various)	2,664,235	13,293,000	15,957,235	2,123,608	2,361,311	4,484,919	20,442,154
<b>Total 2016</b>	<b>249,370,000</b>	<b>671,960,000</b>	<b>921,330,000</b>	<b>126,814,000</b>	<b>92,082,000</b>	<b>218,896,000</b>	<b>1,140,226,000</b>

# Wording used on packets for the hobby market & possible solutions

- “Chemically treated. Do not use these seeds for food, feed or processing”
- “Seed may be chemically treated. Do not use seeds for food, feed or processing.”
- “Poison treated”
- “Thiram treated”
  
- Suggestion : substitute the work “chemically” for the appropriate active ingredient such as “Thiram”
- Phase in over reasonable period of time.
- Consider no change to hobby market – current wording has served us well with no incidents ever recorded.
- In the Netherlands they simply print ”not for consumption” on retail packets.
- As a precautionary measure make sure registration is in place for an alternate chemical (such as mefenoxam) for use in the hobby market in case thiram cant be used in future.