

Information on company sizes in the European PRM sector





Sources of data

Covered **sub-sectors** of plant propagating material:
agricultural crops, vegetables, fruits, vines, ornamentals and
forestry

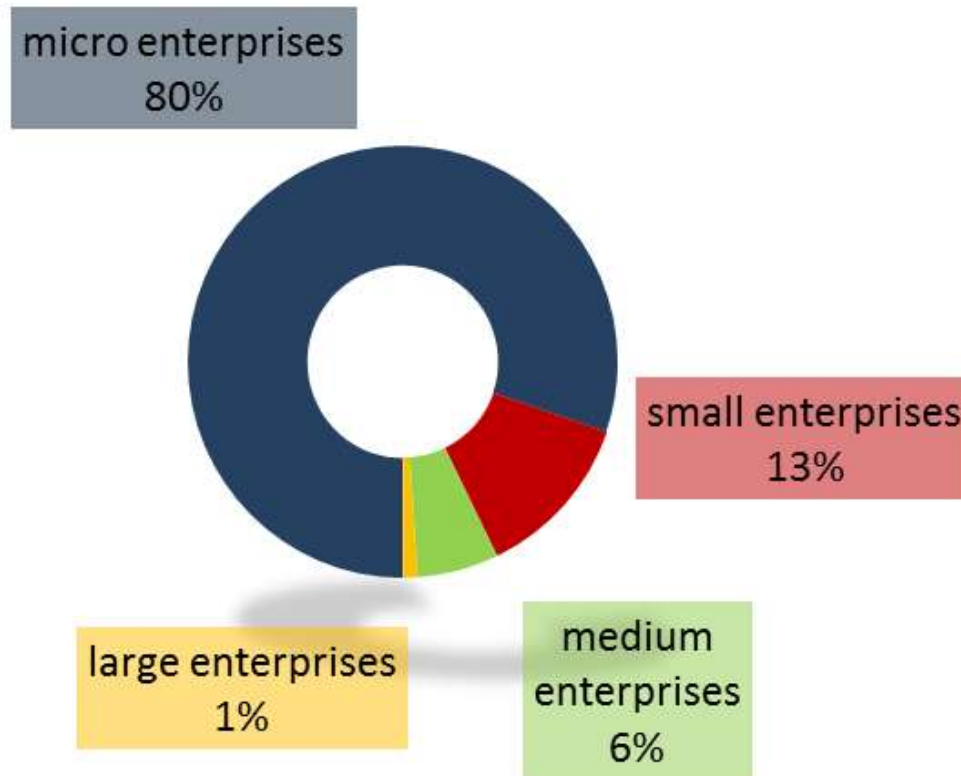
Activities covered: breeding, production & multiplication,
marketing and preservation

Replies from **21 Member States**

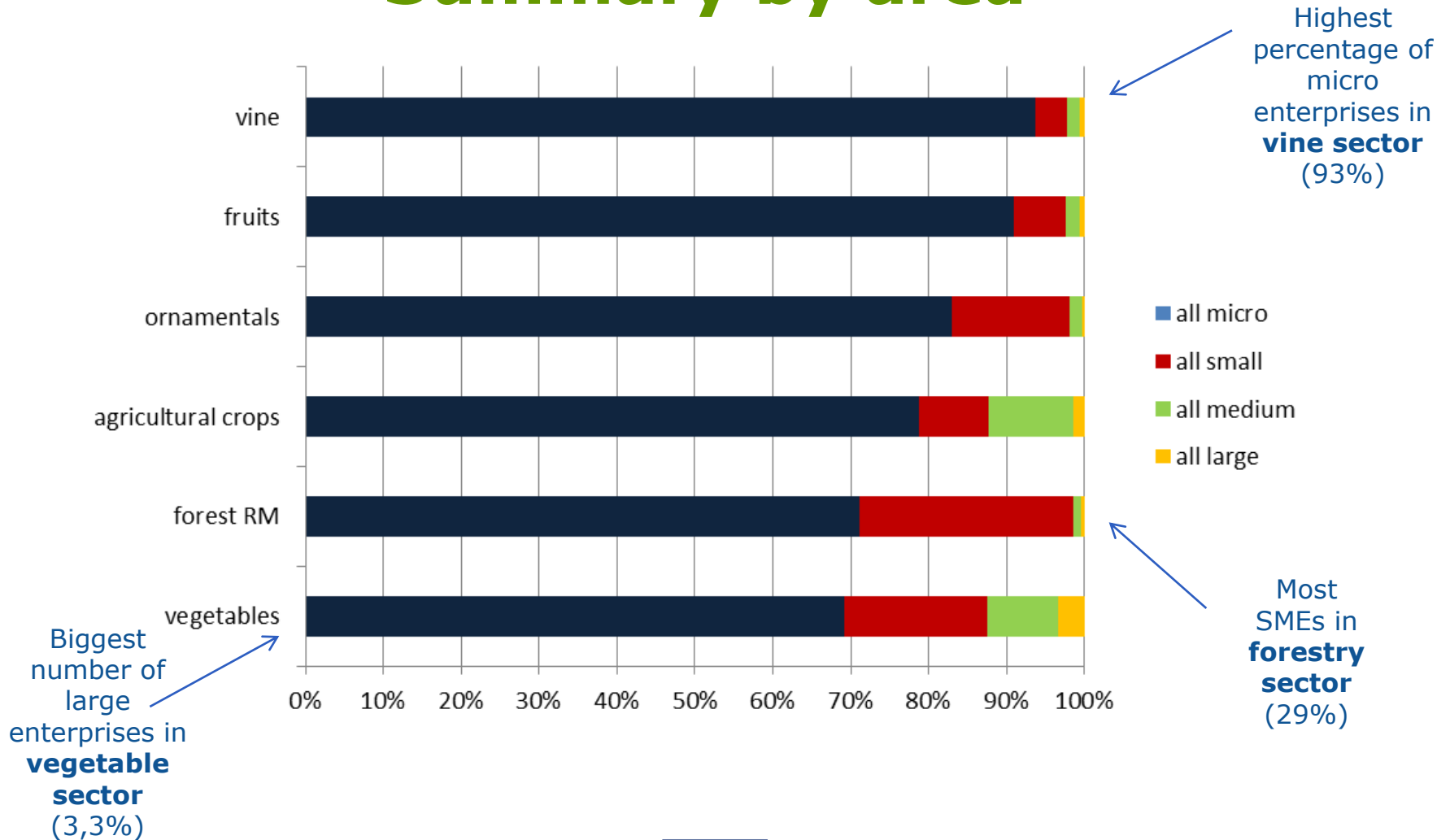
No data on **market share**

Replies differed significantly in detail and resolution,
problematic to carry out a detailed evaluation, but overall
results representative

Summary of all areas and activities



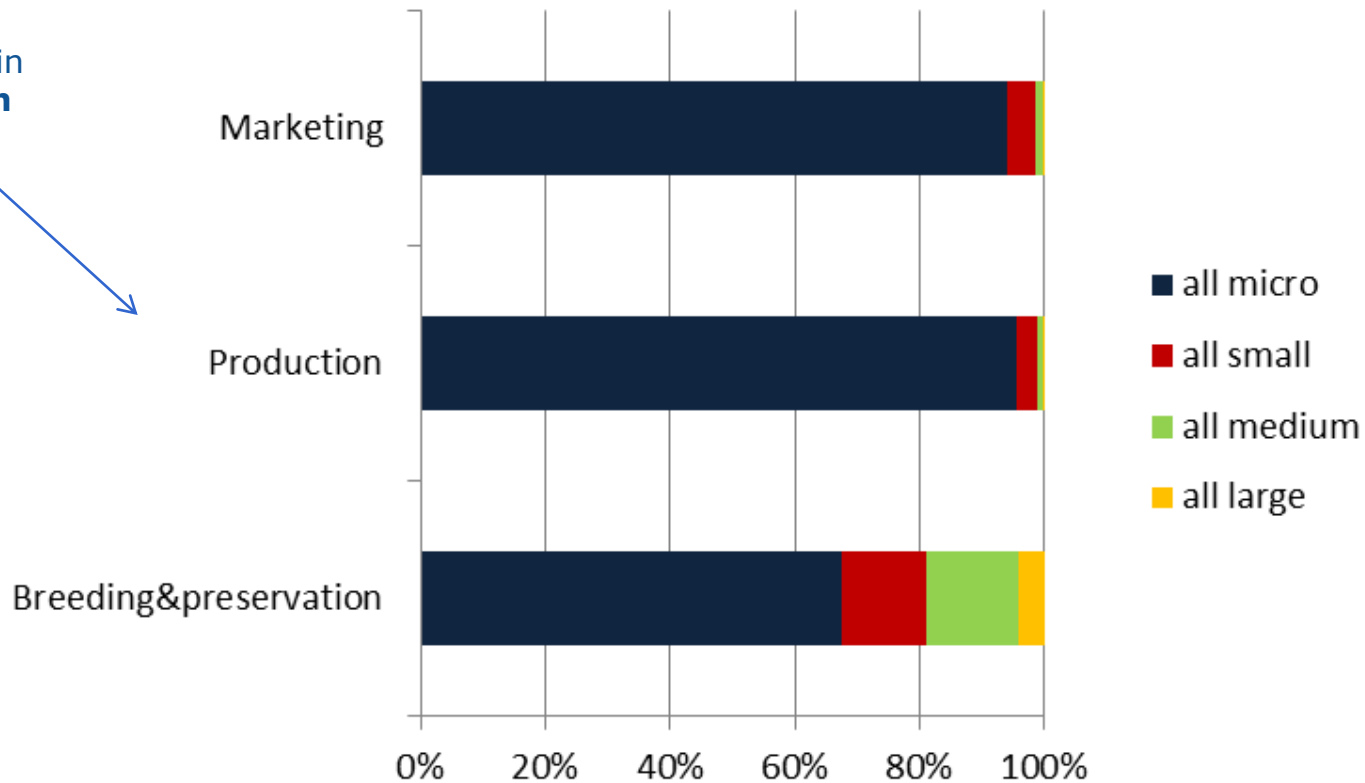
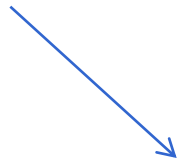
Summary by area



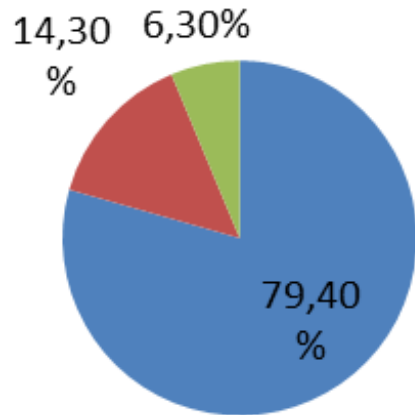
Summary by activity

(comparable data from Croatia, Estonia, Italy and the Netherlands)

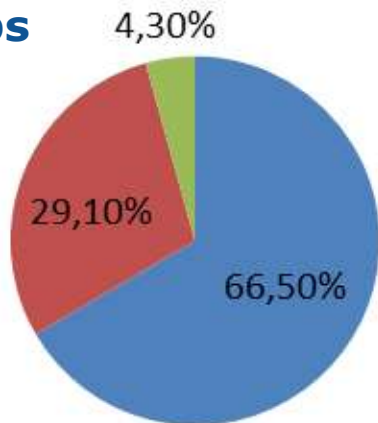
Highest
percentage of
micro
enterprises in
production
(95,5%)



Example: the breeding sector in the Netherlands and in Italy



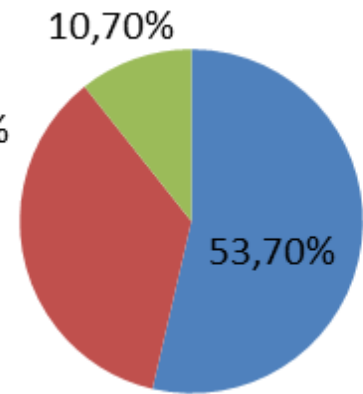
Agricultural crops



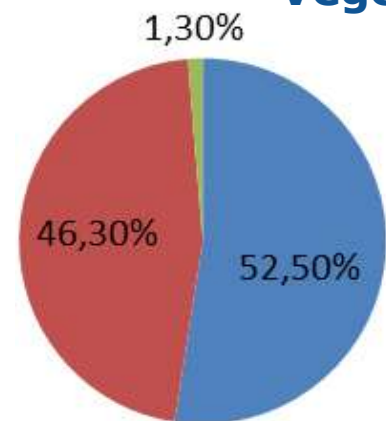
The Netherlands

- Micro enterprises
- SMEs
- Large enterprises

Italy



Vegetables





Examples from Member States

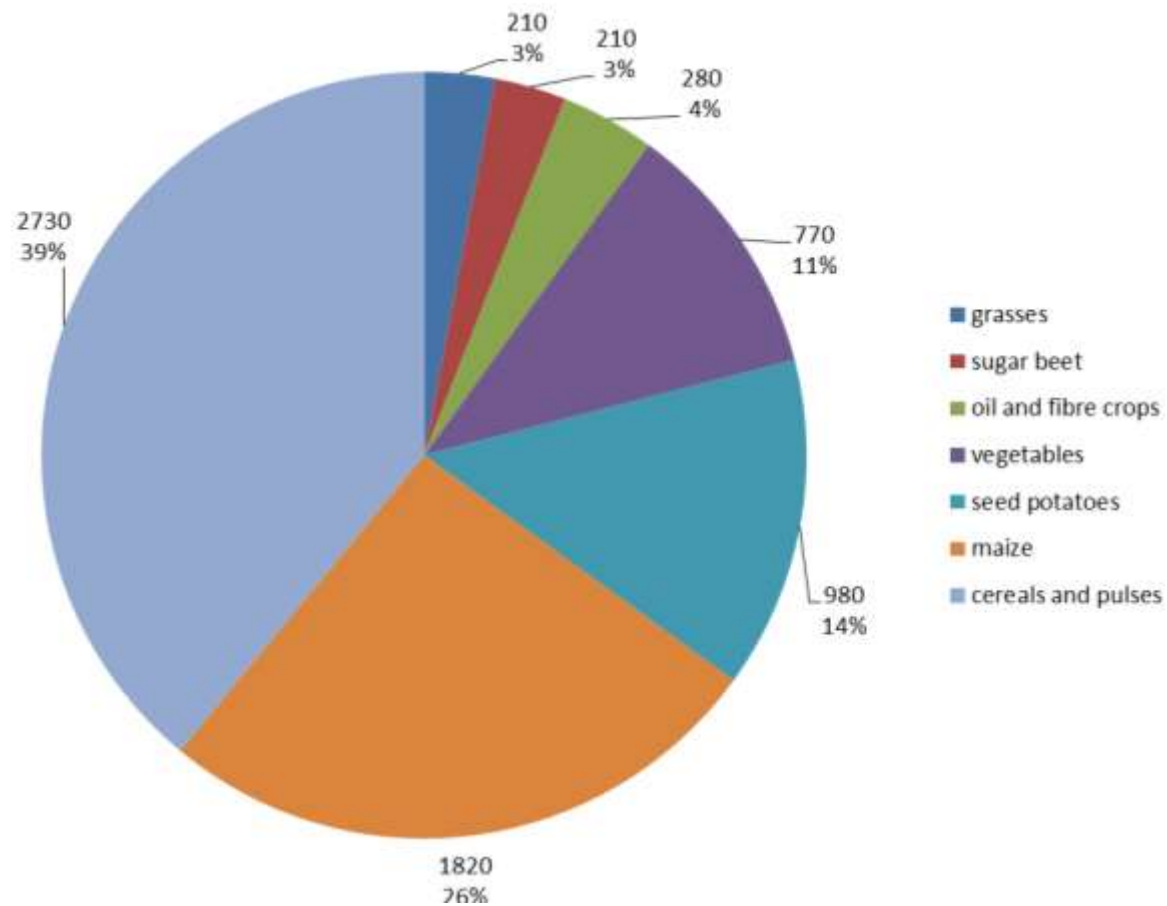
The percentage of **micro** enterprises is the highest in Latvia (100%), Estonia and Finland (both 98,6%) and the lowest in Romania (28,8%).

The highest percentage of **SMEs** is in Romania (71,2%).

The highest percentage of **large** enterprises is in France (10,85%) and Hungary (5,21%).

(Please note that the data made available by the MS do not always cover all sectors)

EU seed market € million





Conclusions

Difficult to carry out a coherent assessment of the data because of differences in coverage

The data show that the vast majority of operators are microenterprises; however, the role of microenterprises differs between sectors and between activities