

ANNUAL REPORT 2023



AGENDA

MESSAGE FROM THE ISF PRESIDENT	3
MESSAGE FROM THE SECRETARY GENERAL	4
KEY EVENTS OF THE YEAR	5
ISF IN FIGURES	18
NEW MEMBERS IN 2023	18
KEY STRATEGIC OBJECTIVES 2021-2025	19
KSO 1	19
KSO 2	22
KSO 3	24
KSO 4	25
KSO 5	27
WHO'S WHO	28
BOARD OF DIRECTORS	28
EXECUTIVE COMMITTEE	28
HONORARY LIFE MEMBERS	28
ISF SECRETARIAT	28

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MESSAGE FROM THE ISF PRESIDENT

We are living in a world that is getting more challenging every day: international movement of seed and agricultural food production is facing increased restrictions due to geopolitical issues, overregulation, protectionism, climate, labour shortage and phytosanitary barriers (biologically relevant or not).

Currently as seed sector we are lacking capacity to react, let alone to anticipate to these developments and as a consequence we are not able to be sufficiently engaged in global, regional and national discussions. Seed associations have challenges in funding, have difficulties to keep experienced staff and member companies get larger and are delegating (understandably) more often specialists at the cost of decision makers. Moreover travel restrictions limit in person meetings more and more. Surely, this is not the right cocktail to react to all the challenges, whilst sustainable agriculture and food security for all are further away than ever.

Therefore, is it, on the brink of a new seed century, time to re-think our approach towards sector-specific challenges? Should and can we be more precise in allocating the right resources to the most urgent of those sector challenges? Is it time to share such resources in a more efficient and clever way (in)between associations and companies?

In order to find answers, continued and enhanced collaboration is key! In 2023, ISF signed a Memorandum of Understanding with CGIAR in order to engage in activities that enable farmers in all parts of the world to contribute to the improvement of agricultural productivity. Furthermore, ISF and the Regional Seed Associations APSA, AFSTA, and Euroseeds renewed their dialogue on enhanced collaboration based on parity. Meetings with other associations are to follow. And last but not least in the ongoing fight against illegal seed practices, ISF, Regional Seed Associations, CLI, Ciopora and several enforcement agencies like AIB, SIPA, SIPI, Breeders Trust and Sicasov finalized an agreement to increase collaboration.

To really deliver and to make these collaborations successful, we need to have strong and empowered teams. Not only at the ISF secretariat but also in the Coordination Groups, Advisory- and Working Groups as well as in the Board of Directors we need committed people with state of the art knowledge on content and are mandated to take decisions on behalf of their associations or companies.

All the above-mentioned groups met several times this year. The Executive Committee and Board of Directors gathered in Dubai for their March Meetings and interacted with the UAE authorities on sustainable food production, climate mitigation, and partnerships. During these meetings, it was also decided to install a Working Group Finance with delegates from the EC and Board in order to further structure and strengthen our financial position.

The Midterm meetings in Athens in November offered a great possibility to continue the work, contributing to the Key Strategic Objectives, on the way to reach our vision and mission.

The highlight of the year, however, was undoubtedly the World Seed Congress in Cape Town. What an inspiring environment and what a vibe! I once more would like to thank the National Organizing Committee under the leadership of David Malan and the SANSOR team led by Lukeshi Chetty. They, together with ISF and KIT, turned this into an unforgettable event with a very positive financial outcome! In South-Africa, next to David and Lukeshni, ex-President Donald Coles, Rick Dunkle and Anke van den Hurk were awarded this year for their outstanding contributions to our sector.

Now, we are intensively preparing for our first centennial. A unique and special year in which we celebrate 100 years of seed trade and what it has brought to the world. But also, it's a great opportunity to engage further with farmers, authorities, intergovernmental organisations, NGO's, universities, research institutes, and the next generation seedsmen and women. Let's use this opportunity together to keep working towards an environment where high-quality seed is accessible to all.

Please use the momentum, and see you at the World Seed Congress in Rotterdam!

Marco van Leeuwen
President



MESSAGE FROM THE SECRETARY GENERAL

Reflecting on the Past to Inspire the Future

I am back from a refreshing and rather cold New Year's break, returning to the office into a world filled with unexpected challenges and an unpredictable future. It's the perfect moment to reflect on what happened in 2023 and how we envision the new year. To a great extent, writing about the past year is also about preparing for the future. This fits perfectly today in 2024 as ISF finds itself navigating into the next century.

My wife Sophie, an astrologist, constantly cautions that the current world will flip into something "new." This does not necessarily mean something negative: it is up to us to be actors for a brighter future. This makes me reflect: isn't it time for all of us to be more engaged, act collaboratively, and recognize the strength in our diversity? Isn't it the moment where, instead of endless conferences, forums, and summits, we should act on the ground and create sustainable impact through refreshed partnerships?

You may wonder why I talk about the future when an annual report should normally focus on things that took place the year before. That's because all we have done in 2023 is geared towards preparing the way ahead. That is how seed people operate: we are always driven by our thoughts for tomorrow – the harvests of tomorrow and the evolving needs of farmers. It's all about our readiness for whatever may come.

2023 was marked by refreshed partnerships and actions: partnership agreements with CGIAR, the launch of the "Inclusive Seed Systems Initiative", the planting of the first trials of the "Harnessing quality seeds for improving food and nutrition security" project in Rwanda, and so many other exciting things that happened in 2023, which you will (re)discover by reading this annual report.

I want to express my heartfelt gratitude to each of you. ISF's many accomplishments this year are thanks to the collective efforts of you, our members and partners.

I'd like to share my appreciation to the members of the Coordination Groups, Advisory Groups, and Expert Groups, who generously provided their time and expertise to advance important topics: innovation, seed movement, intellectual property, sustainability, and many more. At the midterm meetings in Athens last November, we presented our progress on the Key Strategic Objectives and updates on our action plans. It was exciting to see the high level of engagement at the meeting of the Board of Directors, which in its diversity is a key driver of our association. But we are not resting on our accomplishments. There is still plenty of work to be done!

A special acknowledgment goes to SANSOR and the South African National Organizing Committee (NOC) – the longest serving in ISF history – for the outstanding success of the World Seed Congress 2023 in Cape Town, South Africa. Your dedication to delivering a memorable and impactful experience for all delegates was evident throughout the whole congress. It was one for the books.

This message will not be complete without me saying thank you to the ISF Secretariat with whom I work daily. I'd like to name each one (in alphabetical order): Airah, Ben, Bénédicte, Camille, Francine, Joyce, Khaoula, Ludivine, Magda, Marie, Rose, and Szonja who joined us later in 2023. It was no surprise that she integrated very smoothly into the team by maintaining an impressive level of leadership on her topics. Our dear Marie celebrated her 10th year in ISF, and Szonja and Magda their first months. I am so proud of this team as the engine that drives ISF. And yes, another pillar of ISF left in 2023, Hélène, whom I have known since her early days in the French seed union. Sadness turned quickly into happiness, seeing her take her career to another level. Hélène leaves a wonderful legacy by having led the upgrade of the core business of ISF: the trade rules. Merci, Hélène!

Even if it's only effective in early February, our communications guru and lead Francine, who drove us through times when virtual communication was the only way to communicate during the COVID-19 pandemic, who organized the first and, hopefully, only virtual congress in 2020 and semi-virtual congress in 2021, who like a true seedswoman showed readiness to cope with unpredictable situations, but who also gave us a huge boost in our communication efforts. Good luck in your well-deserved new position, Francine.

I am also excited to announce that 2024 will be a historic year for ISF. We will be celebrating the 100th anniversary of our association, a once-in-a-lifetime event. This milestone is a testament to our community's enduring strength and positive impact on global agriculture and food security. What I aspire for 2024 is to see a merited spotlight on the seeds people of the world – on our role, our vision, and our efforts to empower farmers and contribute to food security.

I am thrilled to announce that registration is not only open, but, as of early January, 500 delegates have already registered for this unique historical event, the World Seed Congress 2024 which will be held in Rotterdam, The Netherlands. This promises to be a momentous occasion, offering a venue for doing business, exchanging knowledge, and shaping the future of the seed industry together. I invite you all to join us in making this event unforgettable. Moreover, we will have many opportunities to celebrate throughout the year.

Seed is life! Let's continue to write the history of seed together!

Michael Keller
Secretary General



Seed in the spotlight (photo taken at the Bangladesh Seed Congress in February 2023)

ISF KEY EVENTS OF THE YEAR

17 - 18 JANUARY

ISF-Dutch NOC meeting in The Netherlands

The ISF Secretariat met with members of the Netherlands National Organizing Committee (NOC) chaired by Enza Zaden managing director Jaap Mazerreuw to prepare the way for the World Seed Congress 2024 in Rotterdam. The meeting was hosted in the Rijk Zwaan office in De Lier, where representatives from Plantum and business leaders from Bejo Zaden, DLF, East-West Seed, Enza Zaden, Rijk Zwaan, and Vandinter Semo were present.



24-26 JANUARY



Seed Resilience project kicks off in Rwanda

ISF and Fair Planet representatives met in Kigali to sign a Memorandum of Understanding to partner on a "Seed Resilience" project in Rwanda. The project aims to contribute to the establishment of local and more resilient food systems by promoting access to high-quality seeds, training on Good Agricultural Practices (GAP), and engaging with the public sector to develop the regulatory framework.

9 FEBRUARY

Fruit Logistica held in Berlin

Eleven seed companies and one national seed association gathered at Fruit Logistica to discuss the engagement of the seed industry with other actors in the agri-food value chain.



11-13 FEBRUARY

1st Bangladesh Seed Congress

ISF Secretary General Michael Keller attended Bangladesh's first Seed Congress, inaugurated in the presence of the Minister of Agriculture and attended by 1300 delegates.

26 FEBRUARY

Salon de l'agriculture

In February, SEMAE organized the Salon de l'agriculture in Paris, where a series of roundtable discussions took place on various topics key to agriculture, including seeds. Then ISF Intellectual Property and Legal Affairs Manager H el ene Khan-Niazi participated in the roundtable discussion on matters concerning the conservation of genetic resources in France and worldwide.



7TH TO THE 9TH MARCH



APSA 9th Phytosanitary Expert Consultation

The ISF Phytosanitary Affairs Manager Rose Souza Richards participated in the 9th Phytosanitary Expert Meeting organised by the Asia and Pacific Seed Alliance (APSA) presenting on the phytosanitary challenges and the work of the international seed sector. The engagement with our colleagues from the region and many different government representatives made this meeting a fertile ground for discussions and solutions between the private and public sectors.

16-17 MARCH

ISF Board of Directors meet in Dubai

The ISF BoD met in Dubai to discuss progress on the action plans of the ISF Coordination Groups. The meeting was also an occasion to meet the Presidents, the Secretary General, and the Executive Director of AFSTA and APSA to exchange on the respective priorities and reflect on strengthening cooperation. The ISF BoD also had the opportunity to meet and exchange with UAE government officials on agricultural production and food security topics.



22 MARCH

UPOV EDV seminar

UPOV held a seminar in March on the interaction between plant variety protection and the use of plant breeding technologies (https://www.upov.int/meetings/en/details.jsp?meeting_id=74774), which in principle was meant to further deepen the understanding of EDVs. As a representative of the plant breeding sector, Ms Erin Wallich delivered a presentation during the event, representing the position of ISF.

27-31 MARCH



ePhyto support continues in CPM17

The 17th session of the Convention on Phytosanitary Measures (CPM) of the International Plant Protection Convention (IPPC) was held at the FAO headquarters in Rome, where progress on ePhyto was highlighted by ISF. Three million ePhyto certificates have been exchanged since its pilot in 2017. A total of 116 countries are now on the system, 72 of which are using the system to full capacity.

13 APRIL

ABS Task Force of the ICC meet in Paris

The Access and Benefit Sharing (ABS) Task Force of the International Chamber of Commerce (ICC) met in person for the second time in Paris at the ICC headquarters. The meeting gathered various industries that utilize genetic resources, from the seed sector to the perfume, nutrients, and enzymes industries.

18-20 APRIL

Eleventh Session of the Intergovernmental Technical Working Group on Plant Genetic Resources for Food and Agriculture

ISF provided a written contribution to the 11th session of the ITWG PGRFA where important matters were discussed, such as the impact of seed regulations on genetic resource conservation, access and benefit-sharing, and possible regulation of the use of digital sequence information, as well as the role of plant breeding in climate change mitigation. ISF's report explained the role and views of the association on all these key issues: <https://www.fao.org/3/cc4983en/cc4983en.pdf>

26-27 APRIL

OECD Technical Working Group of the OECD Forest Seed and Plant Scheme in Bratislava, Slovakia

ISF Trees and Shrub technical Lead Ben Rivoire joined the technical working group meeting of the OECD Forest Seed and Plant Scheme organized in Bratislava, Slovak Republic. It provided a great opportunity for the seed industry, represented by ISF Trees and Shrub members, (Helen Richardson, UK), to follow discussions on the OECD global certification system providing a harmonized set of standards for forest reproductive material (FRM). This was a chance to connect and engage with participating members and other external partners (e.g. ISTA, EUFORGEN) on relevant developments and future challenges in the forest industry, such as producing high-quality plant materials to foresters and producers and embracing innovation and digitalization to tackle new growing conditions.



30 APRIL- 4 MAY

ISF and CropLife International co-host two events at ISBR: a workshop on global policy of genome editing and a session on plant breeding innovation (PBI)

ISF Plant Breeding Innovation Coordination Group and CLI co-organized two side events at the International Society Biosafety Research (ISBR) in St. Louis, USA. One session on “Plant Breeding: Today and Tomorrow” with international speakers from industry and academia. The second session was a workshop on “Genome Editing: Global Policy Experience and What the Future may Hold” moderated by Bernice Sltusky (previous chair of the CG PBI who came out of retirement for this event). Government officials from Aragentina, Philippines, Japan, Auustralia, and Germany were invited to present their regulatory framework around genome editing followed by a panel discussion with Industry and academic representatives.



Dialogue with the Japanese government

ISF, represented by its Regulatory Affairs Manager Khaoula Belhaj-Fragnière, participated in a bilateral industry meeting with the Japanese government delegation at ISBR, St Louis along side with ASTA, CLI, and Euroseeds representatives .



3 MAY

IAFN engagement

ISF Secretary General Michael Keller attended an event hosted by the International Agri-Food Network (IAFN) entitled *Partnering 4 Betters*. The same week, Keller participated in the annual forum of The Global Alliance for Climate-Smart Agriculture (GACSA).

8 MAY

Peace4Food round table jointly organized by OECD & Business at OECD (BIAC), in Istanbul, Türkiye

ISF participated in the Peace for Food initiative, which aims to bring international attention to the current situation in global food markets. In this event, ISF explained the contribution of the seed sector in promoting more sustainable, productive, and resilient food systems.

21-24 MAY

ISF speaks at the World Farmers Organisation general assembly

ISF Secretary General Michael Keller joined the World Farmers' Organisation (WFO) in Sun City, South Africa, for their annual general assembly, which brought farmers from all over the world together with high-level representatives of governments, private sector entities, research centers, and academia, international organizations, and financial institutions.



22- 26 MAY

IPPC Guide on Implementation of risk-based inspection for imported consignments

ISF Phytosanitary Affairs Manager Rose Souza Richards joined a group of global experts in Rome to draft the IPPC guide, 'Implementation of risk-based inspection for imported consignments'. This guide aims to assist national plant protection organizations (NPPOs) and other authorized agencies conducting inspections of imported consignments to understand and apply best practices for risk management associated with using inspection as a phytosanitary measure. ISF supports international cooperation and dialogue to address current challenges when moving seeds.



29 MAY



ISF speaks at the ISTA annual meeting in Verona, Italy

ISF was invited to speak at the ISTA Seminar "From Biodiversity to Diversification: resources, tools and technologies to meet new challenges". Khaoula Belhaj-Fragrière presented ISF views on Plant Breeding Innovations and how the private seed sector is engaging to achieve collectively and inclusively the progress of the UN Global Goals for Sustainable Development. The private seed sector stays committed to its engagement on Food Security (<https://worldseed.org/about/what-we-do/seed-sector-declaration/>). Trust and cooperation between the various actors are critical to finding shared solutions to the world's most critical challenges where nobody is left behind.

5-7 JUNE

World Seed Congress held in Cape Town

The largest seed sector congress in the southern hemisphere took place in Cape Town, South Africa, gathering delegates from 60 countries involved in the entire seed industry, from research and development to seed testing, production, and distribution. Jointly organized by the International Seed Federation (ISF) and the South African National Seed Organization (SANSOR), the theme of the congress was "Shared Roots, Greater Heights".



Gugulethu Mahlangu, a young farmer from South Africa, calls on the global seed sector to keep providing solutions and better access to these solutions for farmers. She acknowledges seed as the foundation of agriculture.



Michael Keller, Secretary General of ISF, speaks about ubuntu: "I am because we are" and calls for partnerships to enhance seed resilience in Africa



Marco van Leeuwen, ISF President and Managing Director of Rijk Zwaan, calls for continued innovation and harmonized global policies around seed movement and trade.



L-R front row: Deputy Minister Rosemary Capa (South African Ministry of Agriculture, Land Reform and Rural Development); Deputy Minister Mcebisi Skwatsha (South African Ministry of Agriculture, Land Reform and Rural Development); Marco van Leeuwen (President, ISF and Managing Director, Rijk Zwaan); Lukeshni Chetty (General Manager, SANSOR)

L-R second row: Kulani Machaba (President, Africa Seed Trade Association and Regulatory Lead for Corteva Agriscience AME); Michael Keller (Secretary General, ISF); Matome Ramokgopa (Chair, SANSOR and Managing Director Enza Zaden South Africa), Santosh Attavar (Vice President, ISF and Managing Director, Indo-American Hybrid Seed); and Andreas Wais (Secretary General, ISTA)

Lorena Basso to become the first female president of ISF in 2026

Argentinian seed business leader Lorena Basso was elected second vice president during the ISF General Assembly held on 7 June during the World Seed Congress in Cape Town. This means she will become ISF president in 2026, succeeding first vice president Arthur Santosh Attavar who will take the helm in 2024.



Hamdi Çiftçiler elected into the Executive Committee

Hamdi Çiftçiler, co-president of MAY Seed, was elected as a member of the ISF Executive Committee during the ISF General Assembly in Cape Town.



Donald Coles, David Malan and SANSOR Team recognized for outstanding contribution

At the ISF General Assembly, President Marco van Leeuwen and Secretary General Michael Keller recognized the outstanding contributions of Past President Donald Coles, SANSOR General Manager Lukeshni Chetty, and NOC Chair David Malan.

Donald Coles served as president during one of the most tumultuous periods of ISF and the industry, governing under the COVID-19 pandemic. Notwithstanding, he led the Executive Committee in ushering the transition of the association into its new structure alongside the renewed Key Strategic Objectives. In his acceptance speech, Donald emphasized the value of plant breeders in responding to a changing world. His 40 years of experience in the seed industry includes being the managing director of family-owned Valley Seeds and having initiated supply chain efficiencies that resulted in significant market share increases in forage, turf seed, and wheat. From 2012-2018, he served as President of the Australian Seed Federation.



Lukeshni Chetty gave a heartfelt acceptance of her award together with the SANSOR team onstage. Lukeshni has tirelessly worked to make a successful congress in South Africa, drumming up massive support from sponsors and partners in the country. SANSOR is one of the most active and industry-focused national seed associations, and serves as a role model for nascent NSAs in the African continent. Lukeshni is currently vice-chair of the Advisory Group National Seed Associations and is a member of the ISF Board of Directors.



David Malan was recognized for his indefatigable commitment and positive energy as the longest-serving chair of a National Organizing Committee. His NOC served from 2018-2023, as the congress was originally slated to be held in South Africa in 2020. The postponement due to COVID did not dampen his nor the NOC's spirit and they indeed served one of the most unforgettable congresses in ISF history. David is managing director of Klein Karoo, a South Africa-based independent seed producer.

Marie celebrates 10 years at ISF

At the National Seed Associations meeting held during the closed meetings in Cape Town, ISF Finance and Member Engagement Manager Marie Tahmazian received a token of appreciation for 10 years of service.



8 JUNE

ISF and SANSOR organized an in-person seminar to discuss the systems approach for seed and challenges in implementing the International Standard for Phytosanitary Measures (ISPM) 12: Phytosanitary Certificates. The event aimed to foster dialogue between seed associations, seed companies, and government representatives to address phytosanitary certification and find collaborative solutions. Harmonization and simplification of the complex international seed movement system are needed.



12-13 JUNE

International Symposium on Seed Value Chain, Seoul, Republic of Korea

Ben Rivoire, ISF Sustainability & Crop Value Chain Manager, attended the international symposium on seed value chain development in Gimcheon, Republic of Korea. The event was organized by the Korea Seed and Variety Service (KSVS), with the support of the : Korean Seed Association (KOSA) and gathered more than 230 participants from local seed companies, public and private plant breeders, institutions, and academia.

ISF participated in bringing the global perspective on seed trends and future challenges and discussed with experts from the Korean private seed sector ways to contribute to achieving the goals of feeding the world sustainably, together with other actors in the industry.



10-14 JUNE

OECD Seed Schemes annual meeting, Antalya, Türkiye

Khaoula Belhaj Fragniere, ISF Regulatory Affairs Manager, and Philippe Lesigne, chair of the ISF Coordination Group Market access & Trade, represented the global seed sector at the annual meeting of the OECD Seed Schemes held on 19-23 June in Antalya, Türkiye. The meeting brought together stakeholders comprised of government officials, seed sector

representatives (ISF, Euroseeds, ASTA, CSGA, etc.) and other international bodies (e.g., ISTA, AOSCA, etc.).

ISF presented the private seed sector's position on various topics and contributed to discussions on the strategic plan of the OECD Seed Scheme, as well as the next steps of its digitalization plan. The meeting highlighted progress, challenges, and opportunities related to the current state of seed schemes in OECD member countries and the welcoming of Nigeria as the 62nd Member Country of the OECD Seed Schemes.



16-18 JUNE

IFAMA World Conference, Christchurch, New Zealand and visit of forage and turf seed research and production

IFAMA is a global network bringing together the world's leading scholars and students, academia and universities, agrifood industry actors and NGO professionals, and policymakers to discuss together the strategic focus, transparency, sustainability, and responsiveness of the food and agribusiness system. ISF represented the seed industry in the value chain and took part in the discussion on food and agriculture and the contribution of seed as the starting point. This also provided also the opportunity to meet the the New Zealand Grain and Seed Trade Association (NZGSTA) and visit seed companies specializing in forage and turf seed research and production.



12-14 JULY

Tenth Meeting of the Ad Hoc Open-ended Working Group to Enhance the Functioning of the Multilateral System

The International Treaty on Plant Genetic Resources for Food and Agriculture decided at the end of 2022 to re-convene the Open-ended Working Group on the Enhancement of the Functioning of the Multilateral System to restart negotiations on a revised SMTA (Standard material transfer agreement). The MLS WG held one session in 2023 in July, where a seed industry delegation (Anke van den Hurk, Tom Nickson, Jasmina Muminovic and Ludovic Pâris from the ISF CG GR) was present to voice the views of ISF. This formal meeting of the MLS WG was preceded by an informal gathering organized by the Swiss government in Prangins, where H el ene Khan-Niazi and Tom Nickson represented ISF.

19 JULY

ISF speaks about Plant Breeding Innovation at WTO



Khaoula Belhaj-Fragniere, ISF regulatory Affairs Manager attended the second WTO workshop on "High Grain Yield Seed Development and Revitalization of Green Revolution" hosted by the Permanent Mission of the Republic of Korea to the WTO and the Korea Rural Economic Institute (KREI) at the WTO premises in Geneva. The event offered a valuable opportunity to showcase the plant breeding

innovation work undertaken by the private seed sector in providing solutions to address the global food security challenges. ISF issued a call to WTO members on harmonization of the global policy environment and trade to move forward and achieve revitalization of green revolution and food security in the light of the growing population and climate change.

1 AUGUST

First seeds sown in Rwanda

On August 1, ISF and Fair Planet together with government and private sector representatives sowed the first seeds of the Rwanda Seed Resilience project in the Horticulture Center of Excellence (HCoE) in Kigali.



The same week, the first Rwanda National Seed Congress was held in Kigali, organized by the National Seed Association of Rwanda (NSAR) in collaboration with the Private Sector Federation and the Government of Rwanda. ISF Secretary General Michael Keller was present along with over 200 participants.



20-25 AUGUST

Seed health in the spotlight at international plant pathology conference

ISF hosted a satellite event during the International Congress of Plant Pathology (ICPP) 2023 held in Lyon, France, showcasing the groundbreaking efforts of the International Seed Health Initiative and the Regulated Pest List.



At the same event, ISF Phytosanitary Affairs Manager Rose Souza Richards showcased the collective efforts of the international seed sector during the concurrent session at ICPP 2023 in Lyon, France. She discussed the intricate challenges involved in the global movement of seeds, including biological relevance.

22 AUGUST



ISF speaks at the Africa Biennial Biosciences Communication Conference

The ISF regulatory Affairs Manager Khaoula Belhaj Fagnière addressed a keynote speech on the regulatory oversight of Plant Breeding Innovation, trends and challenges, at the Africa Biennial Biosciences Communication Conference held in Nairobi, Kenya (22-24 August). This conference themed "Evolution of Genetic Improvement tools in Agriculture: Is communication matching up?" was organized by the International Service for the Acquisition of Agri-biotech Applications (ISAAA Africenter) and partners. This high-level meeting brought together government actors from National Biosafety Authorities in Africa, African Union Development Agency (AUDA-NEPAD), Ministries of Health and Ministry of Agriculture and Livestock as well as renowned scientists, farmers, seed sectors representatives and journalists.

29-31 AUGUST

ISF Tree and Shrub Group meets in Sweden

The ISF Trees and Shrub (TAS) Group met in Falun, Sweden, for its annual meeting. TAS consists of national associations and individual companies (public and private) that are active in the tree and shrub seed trade. Currently, 22 active members from 18 countries participate in this group, covering all parts of the world.

The TAS Group focuses on issues relevant to the sector to facilitate trade in tree and shrub seeds. Technical excursions are usually planned to tree stands, orchards, nurseries, arboreta, model forests, and other tree-related locations to discuss the future of the industry, including the use of technologies (e.g., drones), and contribution to ambitious reforestation plans and climate change mitigation.



1 SEPTEMBER

ISF joins World Benchmarking Alliance

ISF officially joined the World Benchmarking Alliance (WBA). This is part of the collaboration with WBA, which became ISF affiliate member after the last General Assembly in Cape Town. The WBA is composed of organizations working at global, regional, and local levels to shape the private sector's contributions to achieving the SDGs. Echoing the spirit of SDG17 – Partnerships for the Goals, ISF believes in the power of benchmarks and cross-sector partnerships to drive systemic progress on the SDGs.

11-14 SEPTEMBER

30th China Beijing Seed Industry Conference

ISF Secretary General Michael Keller spoke at the 30th China Beijing Seed Industry Conference and International Seed Industry Forum, highlighting the contributions of the Chinese seed industry in promoting food security and sustainable agriculture in China and beyond. The forum, which was organized by the China National Seed Trade Association (CNSTA), also saw the participation of members of the Chinese national government and Beijing authorities.

12-15 SEPTEMBER

Global Symposium on Farmers' Rights

As agreed in the 9th session of the Governing Body of the International Treaty, a Global Symposium on Farmers' Rights was held in 2023 hosted by the government of India in New Delhi. At the event, Szonja Csörgő (then as a Euroseeds employee) represented the global seed sector and shared the seed sector's perspectives and approach regarding the realization of Farmers' Rights in practice. During the event, she also participated in a panel discussion about 'hot' topics, such as DSI, breeders' rights, and their relation with and impact on Farmers' Rights.



26-27 SEPTEMBER

OECD Forest Seed and Plant Scheme meeting/Annual meeting

ISF participated in the OECD Forest Seed and Plant Scheme annual meeting to follow discussions on the OECD global certification system providing a harmonized set of standards for forest reproductive material (FRM), on behalf of the tree seed industry.

27-28 SEPTEMBER

ISF participates in SAA Meetings

Khaoula Belhaj-Fragnière, ISF Regulatory Affairs Manager, represented ISF at the Seed Association of the Americas (SAA) meeting held in Lima, Peru. Khaoula was invited to present at the SAA Biotechnology and PBI working group on the regulatory oversight of plant breeding innovations (PBI), global trends, and challenges.



27-29 SEPTEMBER



NSP-FAO Global Conference on Sustainable Agricultural Mechanization

At the NSP-FAO Global Conference, Christine Hazel, Global Regulatory Lead at Corteva Agriscience, representing ISF discussed the topic of "Innovations in Precision Planting: The Role of Seed Pelleting." Christine's presentation delved into the transformative world of pelleted seeds, a product made possible by advanced seed treatment technology. When combined with no-till and cover-crop practices, pelleted seeds promote sustainable agriculture by enhancing crop emergence, vitality, and food security, by promoting access to high-quality seeds, training on Good Agricultural Practices (GAP), and engaging with the public sector to develop the regulatory framework.

28 SEPTEMBER

Chilean Seed Congress gathers 600 seed professionals and partners

ISF joined ANPROS for the Chilean Seed Congress, which was postponed due to heavy rains and flooding in Chile. The congress, titled "Seeds: the foundation of food security," highlighted the sector's importance in providing food to the country and the rest of the world, ensuring quality and nutrition through seeds and the production of new varieties.



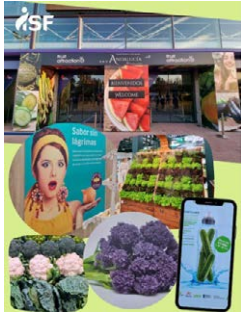
2-6 OCTOBER

ISHI celebrates 30 years

The International Seed Health Initiative (ISHI) convened in Atlanta for its annual Technical Meeting, commemorating an impressive 30 years of progress. During this milestone event, project leaders shared their latest updates on the 25 ongoing projects within the Initiative. It was also the opportunity for the working groups and different teams to meet and progress on their respective ongoing missions.



4-5 OCTOBER



Fruit Attraction – Madrid, Spain

Fruit Attraction is a major industry event organized in Spain and has become the commercial tool of reference for the worldwide marketing of fruit and vegetables. Ben Rivoire, ISF Sustainability and Crop Value Chain Manager, joined numerous seed companies and national seed associations involved, illustrating the continuous engagement of ISF members in bringing innovation throughout the fresh produce value chain, benefiting farmers, retailers, food distributors, and end-consumers. The seed sector supports resilient and sustainable global food production by promoting and encouraging active dialogues between the seed sector and key stakeholders in the food value chain.

16-20 OCTOBER

World Food Forum 2023

The seed sector renewed its commitment to agrifood systems transformation during the World Food Forum held at the FAO Headquarters in Rome. ISF Secretary General Michael Keller participated primarily as Chair of the International Agri-Food Network (IAFN) and the UN Committee on World Food Security Private Sector Mechanism.



Michael also moderated the session, "Accelerator Mentorship Programme for Women-led SMEs in Africa," in which women agro-entrepreneurs from Ghana, Nigeria, and Kenya shared the positive impact of mentorship on them in creating inclusive and equitable businesses along the agrifood value chain.

18 OCTOBER

ISF Forage and Turf Group meets in Malta

The ISF Forage and Turf Advisory Group met at the fringes of the Euroseeds congress. The Group comprises experts (17 members, including the Chair and Vice-Chair, and three observers) from all over the world and from different company structures and sizes, representing the diversity of the seed industry.

23-27 OCTOBER

UPOV sessions

At the end of October, the regular UPOV sessions took place. Various UPOV bodies met and advanced in the discussions. One key moment of the event was the meeting of the UPOV Council, in which the new [Explanatory Note on EDVs](#) was adopted following several years of intense discussions. This new Explanatory Note reflects many of the key points that ISF and other breeder organizations advocated for and thus constitutes a big step forward in the consideration of EDVs in the future. ([See ISF Press Release here.](#))



30 OCTOBER – 4 NOVEMBER

ISF midterm meetings held in Athens

Members of the Board of Directors, ISF Coordination Groups, Expert Groups, and Secretaries of National and Regional Seed Associations gathered in Athens, Greece, for the ISF midterm meetings.

The action plans of the various groups were reviewed and priorities were set for the coming year. These include policy development and advocacy on seed trade and phytosanitary matters, plant breeding innovation, intellectual property, market access, engagement with the value chain, environment and social responsibility, and others.

In addition to the topics in focus for each group, the meeting in Athens kicked off the celebration of ISF’s 100th anniversary. Members discussed opportunities for engagement during the momentous occasion of the association’s centenary, culminating in the 2024 World Seed Congress in Rotterdam, The Netherlands.

On the last two days of the meetings, the Board of Directors and the ISF Secretariat met to review and assess progress on the Key Strategic Objectives 2021-2025.



At the midterms, ISF members **Anke van den Hurk** (Plantum) and **Ric Dunkle** (ASTA) received recognition for their outstanding contributions to ISF. Anke has dedicated almost two decades of her professional life to the discussions on genetic resources at the International Treaty, while Ric has been one of the long-standing pillars of the seed sector on phytosanitary issues and the international seed movement. We wish them both a happy and fulfilling retirement.



8 NOVEMBER

ISF Sugar Beet meeting held in Einbeck, Germany

ISF co-organized the sugar beet working group meeting with Euroseeds, hosted by KWS Group in Germany. This Expert Group, composed of representatives from the sugar beet seed industry, meets once a year to exchange updates on relevant topics and to assess how ISF can assist and support in driving the business in terms of trade and innovation from a global perspective. Specific matters related to intellectual property, market access, seed health, seed-related innovation, and technical regulatory environment were discussed.



8 NOVEMBER

WTO Workshop on high-yield grain

ISF attended the 2nd World Trade Organization (WTO) workshop on “High Yield Grain Seed Development and Revitalization of Green Revolution” hosted by the Permanent Mission of the Republic of Korea to the WTO and the Korea Rural Economic Institute (KREI).



9 NOVEMBER

IGTC annual meeting

ISF participated in the Annual General Assembly of the International Grain Trade Coalition (IGTC) held in Geneva, and shared insights into ongoing efforts on electronic certification and global policy of plant breeding innovations.



13-14 NOVEMBER

Engagement with Business at OECD (BIAC) and participation in the AgriFood Forum Peace for Food event

ISF participated in the Business at OECD (BIAC) Food and Agriculture Committee, which contributes to OECD's work on sustainable agriculture and trade in the agri-food chain. On this occasion, Ben Rivoire, ISF Sustainability and Crop Value Chain Manager, was nominated as one of the vice-chairs of the BIAC Food and Agriculture Committee, which provides an opportunity to bring the seed industry expertise and perspective to drive policy topics in supporting sustainable agrifood systems with other stakeholders and regulators.



19 NOVEMBER

ISF Expert Group Vegetable Seed Production meet at APSA congress

The ISF Expert Group on Vegetable Seed Production, chaired by David Malan, convened its second meeting of the year in Christchurch, New Zealand during the Asian Seed Congress.



20-24 NOVEMBER



ISF speaks at the Asian Seed Congress

ISF, regulatory affairs Manager Khaoula Belhaj-Fraginière was invited to speak at the Asian Seed Congress in Christchurch and to present the global seed industry views on EDV and PBI at the two events, respectively. The first event was a workshop on “Essentially Derived Varieties (EDV): A Perspective from Breeders”; The second event was organized by the Standing Committee on International Trade and Quarantine.

20-24 NOVEMBER

10th session of the Governing Body of the International Treaty on Plant Genetic Resources for Food and Agriculture

At the end of November, the International Treaty held its 10th Governing Body session in Rome. During the Opening Ceremony, Michael Keller delivered a speech on the key topics that ISF wished to see progress in during the Governing Body meeting. At the session, the commitment of Contracting Parties to work on the enhancement of the Multilateral System and to have a new proposal for a draft revised SMTA for 2025 for the 11th session of the Governing Body was clearly confirmed. Besides the MLS, important topics such as Farmers' Rights and conservation and sustainable use of PGRFA were also discussed, and the technical inter-sessional committees dealing with these topics were re-established. Thus, the next Treaty biennium (2024-2025) promises to be intense on various fronts.

During the Governing Body, ISF also organized a side event on the topic of “Seed resilience – what does it mean and how can it be realized?” The event featured a presentation from ISF on the Rwanda project delivered by Emily ter Steeg and a panel discussion with participants from CGIAR, the seed sector, Oxfam, and CTDI, and was moderated by Szonja Csörgő. The discussion allowed participants to exchange experiences and perspectives on approaches to delivering high-quality seeds to farmers, particularly smallholders across the globe, and resulted in the identification of several bottlenecks that still have to be overcome to achieve real success on the ground.



21-22 NOVEMBER

STDF engagement on phyto and seed trade

Rose Souza Richards, ISF Phytosanitary Affairs Manager, participated as an Observer in the World Trade Organization's (WTO) Standards and Trade Development Facility (STDF) Working Group Meetings. This engagement allowed the international seed sector to delve into STDF's activities and further engage with them and the other international organizations also present, such as WTO, UNCTAD, ITC, World Bank, FAO and IPPC. ISF is a Technical Partner for the STDF PG755 project with APAARI, APSA, ASTA, and Crop Life Asia.



24 NOVEMBER



Dialogue with New Zealand government

ISF Regulatory Affairs Manager Khaoula Belhaj Fragnière met with New Zealand government officials alongside Sam Crowell (ASTA) and Katherine Delbridge (ASF). Representatives from three agencies dealing with the Hazardous Substances and New Organisms Act (HSNO) act were present at this meeting, i.e., the Ministry For the Environment (MFE), Ministry of Environmental Protection (EPA), and Ministry of Primary Industry (MPI).

24 NOVEMBER

ISF at FAO Geneva

ISF Phytosanitary Affairs Manager Rose Souza Richards participated in a session at the 'Strengthening Phytosanitary Systems Worldwide' event, hosted by FAO in Geneva, which delved into the crucial intersection of One Health and plant health, and safeguarding global ecosystems



25 NOVEMBER

ISF & CGIAR forge partnership to improve farmer's access to quality seed and innovation

ISF and CGIAR, the largest the world's largest agricultural research partnership, signed a Memorandum of Understanding (MoU) to address low agricultural productivity resulting from poor adoption of improved varieties and limited access to quality seed in many countries. The private and public sector are engaging jointly to empower farmers in the world, and with this memorandum ISF aims to further increase farmers' access to quality seeds.



"This is a significant step towards addressing the challenges faced by farmers, the primary stakeholders of the seed sector. By combining our respective expertise and resources, we hope to make a lasting impact on global agricultural productivity and food security, improving awareness about the benefits of modern varieties. By pooling



knowledge, expertise and resources, we hope to create a lasting impact on the livelihoods of smallholder farmers globally, promoting sustainable and resilient agricultural practices. There is not better time than now to strengthen public-private partnerships and to collaborate in trust." Says Mickael Keller

More details can be found under this link: <https://worldseed.org/article/isf-and-cgiar-forge-partnership-to-improve-farmers-access-to-quality-seed-and-innovation/>

27 NOVEMBER



Business at OECD

ISF, represented by Ben Rivoire, participated in the Business at OECD (BIAC) event on digital transformation in agriculture titled "Field of the Future." ISF highlighted the current use of innovative technologies in plant breeding and seed production, calling for predictable and science-based policies encouraging innovation and the uptake of the use of technologies for the benefit of the whole food value chain.

5 DECEMBER

UNCTAD eWeek

ISF joined the UNCTAD eWeek 2023, where its Phytosanitary Affairs Manager Rose Souza-Richards participated in the session on “Enhancing Trade and Traceability in Agri-Food Supply Chain through SPS Electronic Certification,” co-organized with the World Trade Organization Standards and Trade Development Facility (STDF) and OECD. The session highlighted digital technologies’ role in managing risk and ensuring efficient agri-food markets, noting the huge computing advancements that are enabling data storage, analysis, and digitalization in plant product supply chain.



7-8 DECEMBER

Global AgriTech Food Summit

ISF participated in the Global Agritech and Food Summit, which gathered players along the agrifood value chains to discuss technologies to address current challenges like soil health and carbon emission, data collection, and use for the farmers to the end consumers.

11 DECEMBER

ISF and WTO fight against seed fraud

This year’s Annual Symposium of the World Trade Organization (WTO) Agriculture and Commodities Division (AGCD) focused on illicit trade in food and food fraud. ISF Secretary General Michael Keller joined speakers from other industries and agencies to share the economic and social consequences of illegal seed practices.



11-13 SEPTEMBER & 13 DECEMBER

WIPO IGC and Preparatory Committee of the Diplomatic Conference to Conclude an International Legal Instrument Relating to Intellectual Property, Genetic Resources and Traditional Knowledge Associated with Genetic Resources

The Preparatory Committee held two meetings at the end of 2023 to discuss the modalities of the Diplomatic Conference, which will take place on 13-24 May 2024 to conclude on the Legal Instrument. This discussion is principally on disclosure of origin requirements in patent applications but the discussions will still be opened at the Diplomatic Conference. ISF will closely monitor and follow this matter in 2024.

ISF IN FIGURES

ISF welcomed new members in 2023

ASSOCIATE MEMBERS	COUNTRY	
Lal Teer Seed Ltd	Bangladesh	
Krishibid Group	Bangladesh	
Indo American Hybrid Seeds	India	
Avan Sabz Aseman Company	Iran	
Kimia Khak Falate Sabz	Iran	
Sakata Seed	Japan	
Sarraj for General Trade	Lebanon	
Plantseeds Ltd.	Sri Lanka	
AFFILIATE MEMBERS	COUNTRY	
Manna Irrigation Ltd	Israel	
World Benchmarking Alliance	Netherlands	
ORDINARY MEMBERS	COUNTRY	
Association of Improved Seed Importers of Iran	Iran	
Seed Trade Association of Malawi	Malawi	
National Seed Association for Rwanda	Rwanda	
ISHI & RPLI MEMBERS		
Top Seeds	Israel	

+190%

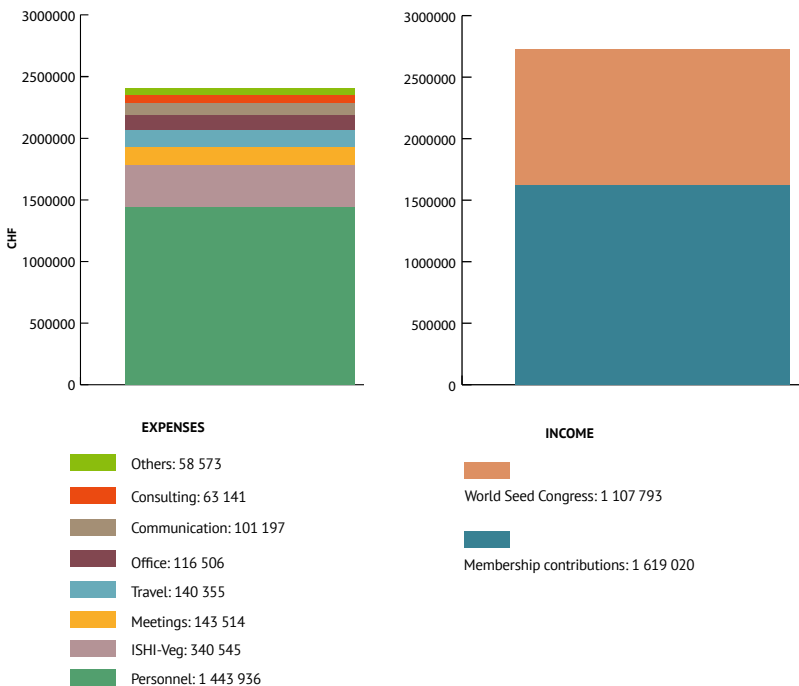
Growth in engagement rate (4.9%) after the campaign on "[Women in Science, Women in Seed.](#)"



7,500

Number of seed companies involved in ISF through membership in national seed and trade associations or through direct membership. They are small and medium enterprises, family businesses, cooperatives, and international companies engaged in breeding, production and trading.

Our association's income and expenses in 2023



1,259

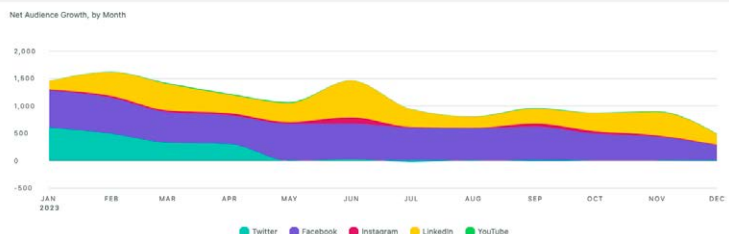
global seed professionals gathered in Cape Town for the World Seed Congress 2023, representing 474 companies from 60 countries.



76,000+

After a 20% growth in the online community of ISF in 2023, ISF's online community grew to 76,159 as of 31 December 2023.

Audience Growth
See how your audience grew during the reporting period.



KEY STRATEGIC OBJECTIVES 2021-2025

KSO1

KSO 1 to promote the benefits of quality seed as the foundation of sustainable agriculture value chains

2023 was a year punctuated by important events for ISF and the world of agriculture, particularly for the seed industry, whose crucial role at the start of the value chain is becoming increasingly clear to all players. Three years after the seed declaration signed in 2021 by numerous seed companies and seed associations and two years after the establishment of the new ISF structure (2022) with some key working groups and experts joining forces for a shared vision and mission, key milestones and committed partnerships in 2023 have set the course for concrete action by the seed industry in the months and years ahead.

ISF acted to tackle the challenge of “promoting the benefits of quality seed as the foundation of sustainable agriculture value chains” from different perspective and for different actors, from youth and students to policy makers and regulators, from farmers to food retailers by (1) informing/ communicating, (2) engaging, (3) partnering & building alliances:

Sub-objective: Increasing the visibility of the seed sector and farmers in ensuring global food security, sustainable crop production, health and climate adaption, and of their contributions to the achievement of the UN SDGs

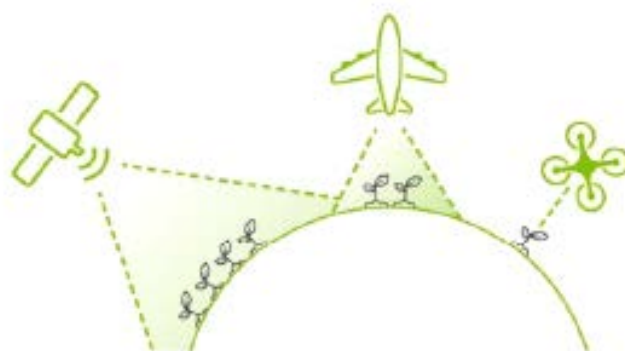
Informing members and communicating broadly

Within the ISF Structure, most of the working groups (coordination groups, advisory-expert-special groups) have a key role to play in relation to sharing information amongst ISF members by creating trustworthy discussion platforms and bringing relevant matters for each sector. These working groups are also key to develop communication content and narratives for external partners beyond the seed industry to elevate our engagement with all actors in the agri-food value chain (including policy-makers and regulators), promoting the work of the seed sector to help ensure global food security, sustainable crop production, health, and climate adaption, and contributing to the achievement of the UN SDGs.

It is important to highlight the role of crop-specific groups (Vegetables & Ornamentals, Sugar Beet, Field Crops, Tree and Shrub, Forage and Turf), each of them working on

their specificity within the seed industry and bringing the knowledge and expertise to address challenges, such as new regulatory requirements, movement of seeds, trade barriers, that could impact business growth, profitability and sustainability, allowing farmers to be able to access the best quality seeds and varieties.

Throughout the year, experts meet, either during ISF closed or midterm meetings or at the fringes of other relevant regional or international events to discuss and agree on the next steps for the Group and for ISF (see key events of the year). Coordination with other horizontal working groups is key to ensure an appropriate collective action to serve the industry (see Guide prepared by the Expert Group Vegetable Seed Production on “*potential of remote sensing technology in vegetable seed production*”).



Potential of remote sensing technology in vegetable seed production

Based on the outcomes of a survey conducted in early 2023 involving more than 250 ISF members, the Environment and Social Responsibility (ESR) Coordination Group confirmed its engagement towards “Engaging the seed sector in one voice in supporting more sustainable and resilient value chains” by focusing on four key objectives:

- 1- **Create trust to enable discussion on key topics by promoting positive engagement of members**
- 2- **Position the seed sector as a leader and engage key stakeholders to create impact**
- 3- **Provide guidance and relevant information to members based on industry needs and priorities**
- 4- **Identify and collectively engage in (relevant) current and forthcoming challenges**



From an information-sharing point of view, within the seed community, a series of online “Sustainability Talks” (closed online meetings for ISF members) on topics relevant to the seed industry (biodiversity, rural prosperity and fair practices for seed production, diversity and inclusion, environmental footprint assessment methods and existing guidance at national level on ESR topics) was organized. The Group also organized Channel World Seed episodes on matters related to the environment, such as soil health and reforestation.

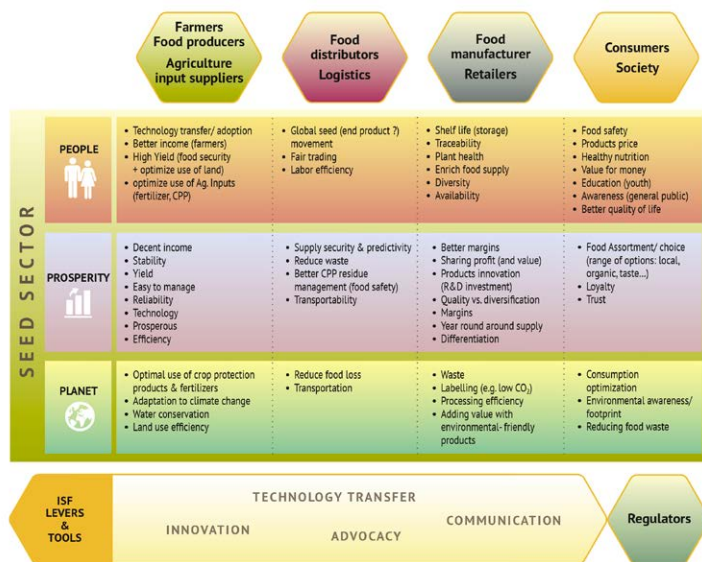


Sub-objective: Increasing the visibility of the seed sector and farmers in ensuring global food security, sustainable crop production, health and climate adaption, and of their contributions to the achievement of the UN SDGs.

Concerning the guidance provided to members, a digital toolkit was agreed to be developed, gathering stories of innovative cases and stories from ISF members on topics related to ESR.

In the run-up to World Food Day and following the [UN Food Systems Summit+2 Stocktaking Moment \(UNFSS+2\)](#) held in

Rome in July 2023, ISF published an article, “[Planting Seeds for Sustainable Future Food Systems](#)”, on Farming First to map out the complexity of the food ecosystem and assess the contribution of the global seed industry since UNFSS in 2021 and list out ways to engage further with both international and national actors.



Sub-objective: elevating the engagement of the seed sector with international organizations, governments, NGOs, and philanthropic bodies

Engaging

The ISF Value Chain (VC) Coordination Group was established to support the work of ISF and its members by creating a platform for discussion and actions to facilitate and promote enhanced movement of seed and increase the understanding and recognition of seed as a starting point in agrifood production. This is done through structured and sustained engagement with the different actors along the different value chains.

In 2023, the VC CG clarified its mission to support resilient and sustainable global food production by promoting dialogues with key players along the agrifood value chains. One example is the engagement with Business at OECD (BIAC), ISF's Ben Rivoire was nominated as one of the vice-chairs of the

BIAC Food & Agriculture Committee. This is envisioned to provide opportunities to bring seed industry expertise and perspective on policy discussions related to supporting sustainable agrifood systems with other stakeholders and regulators within the OECD.



Partnering and building alliances

ISF has fostered partnerships with international organizations in a bid to raise its profile on discussions related to food and agriculture, emphasizing the seed sector's contribution. In 2023 ISF became corporate member of the International Fresh Produce Association (IFPA) and institutional member of the International Food and Agribusiness Management Association (IFAMA). ISF is also in contact with the International Grain

Trade Coalition (IGTC), allowing us to participate in events and working groups relevant to the seed industry (e.g. trade, innovation, sustainability) and reach out to other actors amongst all agrifood systems. These partnerships also provide opportunities to engage further with farmers, authorities, regulators, intergovernmental organisations, NGOs, universities, research institutes, and youth as the next generation of agrifood leaders.



In 2023, ISF continued its engagement with other international bodies, such as OECD, ISTA, UPOV and WTO within the dynamic of the Coordination Group Market Access and Trade (previously, CG Seed Marketing). ISF confirmed its involvement in the [World Seed Partnership](#), a unique initiative putting five international organizations (ISTA, UPOV, OECD, ISF and WFO) together to create a platform of discussions, increase cooperation, and provide one central point of

information towards explaining how effective and enabling environments can support countries in achieving food security and further economic development in the rural sector.



Rwanda Seed Resilience Project

As part of the "Harnessing quality seeds for improving food and nutrition security in Rwanda" project, also known as the Rwandan Seed Resilience Project, an estimated 84,000 farmers in Rwanda will get training and access to high-quality seeds. This is in line with this five-year initiative to boost food, nutrition, and economic security in Rwanda, and involves farmers participating in training sessions on Good Agricultural Practices (GAP), enabling them to produce and sell significantly higher yields with better produce quality.

After formally launching the project in February 2023, ISF and Fair Planet, together with Rwandan government and private sector representatives, sowed the first seeds of the [Rwanda Seed Resilience project](#) in the Horticulture Center of Excellence (HCoE) in Kigali in August 2023. Transplanting for the first season was held in September 2023, with an open field day and harvest scheduled towards the beginning of 2024.

KSO 2 to accelerate the delivery of innovation and enable seed to remain a contributor to solutions that address farmer and consumer needs through

Sub-objective 1: Promoting consistent, science- and risk-based policies to enhance seed potential

Promoting consistent policies among governments for products issued from the latest plant breeding methods was the key driver of the ISF Coordination Group - Plant Breeding Innovation (CG PBI) in 2022.

Future proofing policies

Advancements in science and technology in plant breeding innovations (PBI) has initiated a new era where tools, deliveries and applications are expanding continuously. Genome editing has revolutionized research in the fields of plant breeding, molecular biology, genetics and genomics and this only the beginning. The ISF CG PBI continued this year to engage in a “horizon scanning” activity to map breeding applications, as well as their implications on the different regulatory frameworks around the world. This activity is translated into the ISF Plant Breeding Innovation policy map and its animated version. Both documents were redesigned this year by the CG PBI to give a better view and understanding of the policy standpoint globally. They are updated regularly and are available to ISF members in the Members Area to be used for outreach activities and advocacy purposes with government and other stakeholders.

While some countries have started implementing policies around products issued from plant breeding innovations, others are still lagging behind creating flux and uncertainty in using cutting edge innovations in plant breeding. To overcome the impact of this fragmented policy environment, both ISF CG PBI and PBI Policy Group of CLI co-hosted a workshop with policy makers, industry and academic representatives on “Genome editing, global policy experience and what the future may hold” at the International Society for Biosafety Research, in St Louis, USA. This industry-led initiative showcased the importance of flexible and “future proof” policies that can keep pace with the continuous advent of plant breeding innovations. A detailed powerpoint presentation on this topic was prepared and was shared to ISF members in the Members Area and can be used for outreach activities with government.

Advocacy/Outreach

As part of its advocacy for an international harmonized policy environment, ISF organized two webinars under Chatham House rules on “Current genome editing technologies, applications and evolution”. Policy maker around the world, National seed associations and Crop Life representatives took part of these special events. ISF was also active in the OECD NBT exchange working group on new breeding technologies. In addition, ISF representatives participated in different meetings and workshops to advocate on PBI in Europe (ISTA, WTO), USA (St Louis), Latin America (SAA) and Asia (APSA), and hosted an innovation panel at the World Seed Congress in Cape Town.

Social media Campaign on the Plant breeding innovation FAQs

ISF CG PBI revised and updated the Frequently Asked Questions (FAQs) on plant breeding innovation in 2022. The FAQs can be found here: [FAQs – International Seed Federation](#). The Expert Group Communication created a social media

campaign on these FAQs named “Friday Fact Campaign” with the goal was to create awareness on Plant Breeding Innovation to the general public. These series of 12 cards were posted every Friday for 3 months starting September 1st. They are downloadable via the ISF Member area where ISF members are encouraged to share on their own networks.

Sub-objective 2: Ensuring fair and efficient access to genetic resources for their conservation and sustainable use

International discussions on access and benefit-sharing and conservation and sustainable use of genetic resources continued in 2023 in both fora that are relevant for the seed sector, namely the CBD and the International Treaty on Plant Genetic Resources for Food and Agriculture (the Treaty).

Exceptionally, the Treaty only had a short, one-year inter-session period between the 10th and the 9th session of its Governing Body, but this did not halt Contracting Parties from making progress on many fronts.

The Ad-hoc Open-ended Working Group on the Enhancement of the Multilateral System, which was re-established during the 9th session of the Governing Body in 2022, held a formal meeting in July, which was also preceded by an informal gathering in Prangins convened by Switzerland and the Meridian Institute. While the informal meeting sought to identify the areas of divergence and convergence on the topics that remained open following the negotiations in 2019, the formal session focused more on establishing the elements of a procedure that may allow the Working Group to finalize its task for the 11th session of the Governing Body. Seed sector representatives attended both meetings and contributed to the discussion aligned with the relevant ISF positions.

The Ad-hoc Technical Committee on Conservation and Sustainable Use also held two meetings in the course of 2023 where two seed sector representatives were involved and contributed to the discussions on what strategy and actions the Treaty could adopt to provide solutions to address bottlenecks in genetic resource conservation and sustainable use in the different regions of the world.

The Treaty also advanced in its workstream on Farmers’ Rights, where the main activity in 2023 was the Global Symposium on Farmers’ Rights hosted by India in September. The event shared views and experiences and mapped the topics that may have a link to Farmers’ Rights to identify areas for further work for the Treaty. Several seed sector representatives attended the Symposium and ISF was also invited to present its views and experiences and participate in a panel discussion on the links between Farmers’ Rights, intellectual property rights and digital sequence information.

The Governing Body reviewed all the inter-sessional work at its 10th session in November, at the FAO Headquarters, where decisions on next steps were taken. The most relevant ones for the seed sector are the decisions on continuing the MLS enhancement process and further work on Farmers' Rights. Regarding the latter, the Governing Body re-established the Ad-hoc Technical Expert Group on Farmers' Rights, which will work together with the Treaty Secretariat to assess the state of implementing Farmers' Rights. On the MLS topic, the Co-Chairs of the Working Group presented their Checkpoint Report which proposed to continue the discussions based on the June 2019 version of the draft revised SMTA, identified three hot topics requiring further in-depth discussions and presented a detailed proposal for the next steps of the procedure. The three hot topics are: (i) the expansion of Annex I; (ii) digital sequence information (DSI); (iii) payment structure and rates. The Governing Body agreed on the proposed elements and mandated the Co-Chairs to continue the work along those lines. In the next inter-sessional period, the Working Group will hold four in-person meetings complemented by other ways of discussion to be able to deliver a final draft revised SMTA to be tabled at the 11th session of the Governing Body in 2025.

Within the CBD, the discussions on benefit-sharing from using DSI continued with the first official meeting of the Open-ended Working Group on DSI in July. During the meeting, the topics identified by COP 15 for further discussion regarding the modalities of the Multilateral Mechanism for Benefit-sharing on DSI were categorized in clusters and views were exchanged among the participants. Although some progress was made, due to the high amount of issues to be discussed and the diverging views that are present among Contracting

Parties as well as stakeholders, the Working Group agreed to establish an Informal Advisory Group that is tasked to advance in the discussions on the issues and advise the Co-Chairs of the Working Group accordingly. This Informal Advisory Group starts its work in January 2024 and will meet monthly to achieve progress. ISF is unfortunately not directly represented but one of the ICC (International Chamber of Commerce) representatives elected to Advisory Group is affiliated with the seed sector.

In line with and in preparation for this international agenda, in the course of 2023, CG Genetic Resources focused its discussions on contributing to the positioning of DSI within the ICC, reviewing the main elements of the ISF position on the enhancement process of the Treaty's Multilateral System and on providing sufficient seed sector representation and constructive contributions at the relevant international meetings.

At the midterm meetings in Athens CG Genetic Resources worked, in light of international developments, on the revision of the ISF position on DSI which will be submitted to the ISF General Assembly in May 2024 for amendments and adoption. The CG also decided to implement an internal education and capacity building program, which will be rolled out in 2024. Given that the CBD discussion on DSI, as well as the Treaty discussion on the enhancement of the Multilateral System, will require clear and uniform positioning from the seed sector, it is key that members of ISF are up-to-date on all the important elements of these discussions, properly understand the implications and possible outcomes, and participate in the positioning process within ISF.



KSO 3 To promote more efficient movement of quality seed to continue to deliver benefits through:

Sub-objective 1: Driving the development of science and risk-based seed policies and standards for seed and promoting their consistent and effective adoption and implementation at national, regional, and global levels.

As we reflect on the past year, it's important to acknowledge the commendable efforts of the Coordination Group - Phytosanitary team in 2023. Our central message has been clear and unwavering: phytosanitary requirements must be firmly rooted in scientific evidence. Our commitment to this principle has been evident in our actions, notably through the dispatch of 13 official letters challenging phytosanitary requirements that lacked technical justification.

Our efforts have not only been about challenging these measures but also about educating and raising awareness globally. It's crucial to recognize that numerous governments continue to implement phytosanitary measures that are not technically justified. While we have made significant strides, the journey is far from over. Much work remains to be done, and our resolve to ensure that science-based phytosanitary measures are adopted worldwide is stronger than ever. Let's continue this important work with renewed vigor in the coming year. The Coordination Group - Seed Related Innovation (CG SRI) has been working on two significant projects that are pivotal to our mission and goals. Firstly, they have initiated work on a statement regarding microplastics. This is a critical issue, given the increasing global concern about the environmental impact of microplastics, particularly in the agricultural sector. We aim to develop a comprehensive and informed statement reflecting

the current understanding and implications of microplastics concerning seed treatment and agriculture.

Secondly, the group has revised the ISF Position Paper on the Movement of Treated Seed. This document is essential in guiding and shaping our stance and recommendations for the international movement of treated seeds. The revision process will ensure that the Position Paper remains relevant, fact-based, and aligned with the latest scientific advancements and regulatory changes.



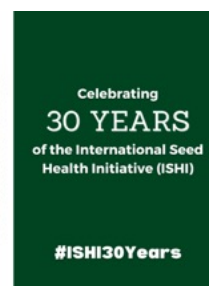
Sub-objective 2: Facilitating the movement of seed through engagement with stakeholders from the entire value chain.

In 2023, the International Seed Health Initiative (ISHI) celebrated 30 years of dedication, collaborative effort, and significant progress in enhancing seed health worldwide. Our journey over the past three decades has been nothing short of remarkable.

In the last six months, ISHI has sustained its mission and amplified its endeavors to advance seed health practices and standards. At the technical meeting in Atlanta, pivotal discussions and initiatives were set in motion to guide ISHI's future direction. A notable topic of deliberation was the strategy for employing a uniform seed extraction buffer across various assays. The consensus was to use the best-suited buffer for each specific assay while striving for alignment across different assays wherever feasible. This decision exemplifies ISHI's dedication to refining and standardizing seed health methodologies.

Another critical focus was the harmonization of controls in our Best Practices documents. Achieving consistency and clarity in control names is crucial for effective communication and implementation. The initiative to align control names across these documents marks a proactive step towards enhanced usability and efficiency.

The celebration of ISHI's 30th anniversary has been a highlight of our journey. We launched the #ISHI30Years social media campaign to commemorate this milestone. During the technical meeting in Atlanta, USA a special tribute was paid to our longstanding members, particularly those who have been integral to ISHI for over 15 years. Their enduring commitment and expertise were celebrated at a special social dinner, where they were honored with personalized mementos, a gesture of gratitude for their substantial contributions to ISHI's success.



Sub-objective: Supporting the recognition of seed company quality management systems in international trade to enhance the movement of seed.

A key highlight for the Systems Approach Expert Group (EG SA) was the successful organization of a site visit for representatives from the National Plant Protection Organizations (NPPOs) of Chile, USA, Netherlands, and South Africa in the Netherlands. This event was of particular importance given the Netherlands' critical role as a major re-export hub in our project.

The participation of representatives from all four NPPOs involved in the ISF Pilot underscored the success of this initiative in promoting international collaboration and understanding. These efforts are vital in our journey towards establishing more efficient and effective phytosanitary measures globally.

Looking ahead, the SA EG is poised to continue its work into the new year. We remain dedicated to driving the ISF pilot forward, focusing on the execution and success of this important initiative.



KSO4

KSO 4 to encourage policy environments that supports fair and sustainable business models

Subobjective: Advocating the necessity and benefits of intellectual property rights for value creation and innovation

Much of the CG Intellectual Property's work focused on UPOV-related matters as in previous years. With regard to the various topics related to an improved interpretation and implementation of some basic concepts and provisions of the UPOV Convention, which are under discussion at UPOV, ISF has continued to work in a closely coordinated manner with other breeders organizations who are observers at UPOV (CropLife International, CIOFORA and all the regional seed associations).

One key moment in 2023 was the adoption of the new Explanatory Notes on essentially derived varieties (EDVs) by the UPOV Council in October. These new Explanatory Notes replace the previous one from 2017 and bring some key modifications. First, the Explanatory Notes clarify that varieties with a single parent (so-called "mono-parental" varieties) which result, for example, from mutations, genetic modification or genome editing are, by definition, predominantly derived from their initial variety. In practice, this means that for mono-parental varieties, the first condition of being an EDV, which is that the variety needs to be predominantly derived from the initial variety, is considered to be automatically fulfilled.

The Explanatory Notes also clarify some elements of the further assessment of EDVs. Another important condition of being an EDV is that the variety must be different from the initial variety but should conform to it in the essential characteristics. The Explanatory Notes state that there is no upper limit as to the number of differences that may result

from the act of derivation. The number of differences between an EDV and the initial variety is therefore not limited to one or very few differences (as in the previous Explanatory Notes) but may vary considering different methods of derivation. Further, the Explanatory Notes also underline that the differences resulting from the act of derivation may also include essential characteristics. This means in practice that in case a derived variety presents one or more differences in essential characteristics, it does not fall outside the EDV scope of the initial variety used to create the derived variety. These important improvements and clarifications align with the understanding of the breeders' community.

UPOV also continued working on other topics of interest for ISF, where members of the CG IP actively contributed to the positioning with other breeders' organizations and participated in the UPOV process. In particular, this concerns the UPOV working group on harvested material and smallholder farmers. In the first one, three UPOV Explanatory Notes were proposed for revision: on propagating material, on harvested material, and on provisional protection.

The work on the Explanatory Notes on Provisional Protection was finalized with the UPOV Council adopting the revised version in October. However, this new version does not bring the clarification that breeders were hoping for because it still fails to give a clear definition of what should be considered as propagating material, which is a key concept of the UPOV

Convention. The revision of the other two explanatory notes is still ongoing, and ISF keeps contributing to and being closely engaged in the work to ensure that the improvements key to breeders are reflected in the discussion. The CG IP, as well as the ISF Task Force on Empowering Farmers, followed the discussions also in the UPOV working group on smallholder farmers, which took a step back in the discussions in October by deciding that further information and knowledge is needed on the matter to better identify questions and situations that may need to be addressed in the discussion and clarified by UPOV. This development allows all those involved in the working group, including ISF, to reflect once again on what breeders can and should contribute to the discussion.

Beyond UPOV, other IP-related fora also advanced in discussions that impact ISF members. One key development is that following the decision taken in 2022 by the WIPO

Intergovernmental Committee on Intellectual Property, Genetic Resources, and Traditional Knowledge to call for a Diplomatic Conference in 2024, the preparatory work for the Diplomatic Conference was done in 2023 and the dates, venue, agenda, and invitations for the Diplomatic Conference have been fixed. It will occur on 13-24 May 2024 in Geneva. The ISF CG IP analyzed the draft Legal Instrument Relating to Intellectual Property, Genetic Resources, and Traditional Knowledge Associated with Genetic Resources to identify the key areas that may raise concerns for the seed sector, and ISF has requested observer status to the WIPO IGC to be invited to participate in the Diplomatic Conference.

Sub-objective: Fostering engagement against illegal seed practices throughout the value chain

The Coordination Group - Illegal Seed Practices (ISP) advanced on several key actions that have been pending on its agenda for a while. Regarding the idea of gathering more information on the legal and practical sides of illegal seed practices and the relevant legal and policy frameworks in different countries, the template to collect the information has been finalized, and the request to the identified priority countries has been sent with the view of having the information from those countries for the next ISP meeting. The priority countries identified by the CG ISP are Poland, China, India, Brazil, Argentina, Kenya, Tanzania, Philippines, Vietnam, Egypt, USA. The information already gathered for Türkiye, Spain, and Italy will be added to these countries.

Another key area of focus for the CG is data collection on the magnitude of illegal seed practices. During the midterm meetings in Athens, the CG agreed on a strategy to engage in this data collection exercise and the execution of this strategy will have to be done in the first half of 2024 to have some preliminary results for the next meeting.

Two other workstreams were also agreed on by the CG ISP. One of them concerns the idea of putting together a series of talking points on illegal seed practices that ISF members can use in any communication they want to engage in. The other workstream concerns revising the existing ISF studies on FSS in cereals and soybeans. These actions will be further rolled out in 2024.

Regarding action against illegal seed practices, the initiative to reinforce engagement with partner organizations has been concretized as a Memorandum of Understanding (MoU) signed between ISF and 11 other organizations. The MoU aims to provide a framework for cooperation where partners can collaborate on projects of common interest by using their knowledge and efforts jointly. The partners are currently in the

phase of establishing their knowledge base which will serve as the starting point to define the projects for the first action plan under the MoU.

ISF also contributed to a WTO publication on illegal activities in food with a chapter dedicated to illegal seed practices, authored by Michael Keller and Szonja Csörgö. The chapter will be published in the first quarter of 2024.



KSO 5 to support ISF members by providing services and becoming the global platform for exchange and collaboration within the seed sector

Sub-objective: Enabling dialogue, business and partnership

General action: Organizing the ISF World Seed Congress

The World Seed Congress 2023 in Cape Town was a remarkable success. Originally planned for 2020, the congress in South Africa was postponed due to the COVID-18 pandemic. Finally, in 2023, ISF and the global seed community were able to hold the congress at the Cape Town International Convention Center – and what a memorable congress it was, marked by a stunning showcase of South African culture and hospitality.



Focus on the youth. This year, over 250 delegates below 40 years-old attended the World Seed Congress. The role of the youth in agriculture is extremely valuable, so this year at the ISF congress, we shined the spotlight on the youth as active contributors, partners, and future leaders of the industry.

A unique space for young delegates was created in the congress exhibition area, called the Future Generation Corner, which provided a place to mingle and network with fellow young professionals over a cup of coffee. Delegates below 40 years old received a different colored lanyard with their badge upon registration, which they wore proudly. In addition, students from several African universities were sponsored by SANSOR to attend the event and to use the opportunity to learn, share, and network.

The voices of the youth were heard on many occasions during the congress: young farmer Gugulethu Mahlangu addressed the industry at the opening ceremony, and young seed professionals from the region spoke in the session called “Young Professionals: Activating Leadership in Africa” in the Channel World Seed studio about what makes the agriculture sector attractive and how today’s youth can contribute to food security in the continent.



Youth-focused initiatives in 2023 pave the way for deeper and more sustained youth engagement in 2024.



Focus on women. For the first time in the ISF Congress, a Women’s Luncheon was held, gathering women in agribusiness to share their experiences and challenges and to create a network of inspiration and empowerment. It began with a short panel session moderated by SANSOR General Manager Lukeshni Chetty, with speakers including Lorena Basso (President, Semillas Basso), Yolandi Furniss (Marketing Lead, Syngenta Seedcare SA), and Susan Allen (Supply Chain Director, Sakata Seed SA). Discussion points included the unique challenges that women face in their professional lives and ways to address them.

General action: Creating internal advocacy tools

The seed sector is home to many outstanding female researchers, plant breeders, pathologists, seed technology experts, agronomists, etc. – and in 2023, we put a spotlight on the different ways in which women are contributing their knowledge, expertise, and unique experiences in driving positive impact in the seed sector and beyond.

We wrapped up a highly successful and vibrant #WomeninScience #WomeninSeed campaign, which ran from February 11th, International Day for Women and Girls in Science, all the way to March 8th, International Women’s Day. The campaign featured a total of 52 individuals who are shaping the future of agriculture and food in different corners of the world – in Asia Pacific, the Americas, Europe, and Africa – through science and innovation. [Read the full collection of stories here.](#)

Another important advocacy initiative in 2023 was the re-launch of the Friday Facts campaign, a series on plant breeding innovation and gene editing.

Previously in 2022, the CG PBI developed a series of fact sheets based on scientifically validated, peer-reviewed articles. From these fact sheets, ISF created a #FridayFacts campaign on social media, featuring graphic cards on gene editing, aimed at clarifying concepts and debunking common myths around gene editing to a wider audience. These resources were made available to our members to support their own communications, via the Members Area.

In 2023, the campaign was refreshed. The basis of the content is the [updated FAQs on plant breeding](#), which the PBI group finalized during the 2022 midterms in the Rome. We’ve refreshed both content and look for a set of 12 new cards, which were posted every Friday for 3 months, starting September 1. The materials are available in English and Spanish.

WHO'S WHO

BOARD OF DIRECTORS (UNTIL MAY 2024)

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President	Marco VAN LEEUWEN	(Rijk Zwaan)	
Vice President	Santosh ATTAVAR	(Indo American Hybrid Seeds)	
2nd Vice-President	Lorena BASSO	(Basso Semillas)	
Past President	Donald COLES	(Valley Seeds Pta)	
Treasurer	Christoph BETSCHART	(Fenaco)	
Hamdi Çiftçiler	(Ordinary Member)	(May Seed)	
Marc COOL	(Associate Member)	(Corteva)	

ORDINARY MEMBERS – PERMANENT 8-10			
Ellen SPARRY	(RedWheat)		
Weibo SONG	(Syngenta)		
Eike HUPE	(DSV)		
Franck BERGER (until June 2023)	(Limagrain)		
Fabrizio CECCARELLI	(SAIS SPA)		
Daiju YUKI	(The Musashino Seeds Company)		
Bert-Jan VAN DINTER	(Vandinter Semo)		
José RE	(Rice Tec)		
Laurent Guerrero	(RAGT Semences)		

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Fred Oloibe	(Kenya Seed)		
Mary-Ann SAYOC	(East West Seed)		
Modou Thiam	(Sedab)		
Hamdi Çiftçiler	(May Seed)		

Advisory Group National Seed Association – Vice Chair			
Lukeshni CHETTY	Sansor		

Advisory Group National Seed Association – Member			
Mario SCHINDLER	Anpros		

Advisory Group Crops – Chairs			
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John Pieter SCHIPPER	(Bejo)		
Nick GOBLE	(Pannar Seeds)		

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Naomi STEVENS			Bayer

Advisory Group Ass. Members – Class 1a-9			
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Marc COOL			Corteva

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ISF HONORARY LIFE MEMBERS (FROM 2002 TO PRESENT)

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| <p>Gisbert Kley (2002), Germany</p> <p>Peter Lange (2002), Germany</p> <p>Manmohan Attavar (2003), India</p> <p>Dietrich Schmidt (2004), United States</p> <p>Christopher Ahrens (2006), United Kingdom</p> <p>Bernard Le Buanec (2006), France</p> <p>Selwyn Manning (2007), New Zealand</p> <p>Orlando de Ponti (2012), Netherlands</p> | <p>John Gilbert (2014), United Kingdom</p> <p>Anton van Doornmalen (2014), Netherlands</p> <p>Tim Johnson (2016), United States</p> <p>Gerard Meijerink (2018), Netherlands</p> <p>Stephen Smith (2018), United States</p> <p>Jean-Christophe Gouache (2020), France</p> <p>Eduard Fitó (2022), Spain</p> |
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ISF SECRETARIAT (2023)

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| <p>Airah Cadiogan ¹, Digital Media Associate</p> <p>Ben Rivoire ², Sustainability & Crop Value Chain Manager</p> <p>Bénédicte Lebas ³, Technical Lead - Regulated Pest List Initiative (RPLI)</p> <p>Camille Béronie ⁴, Events Coordinator</p> <p>Francine Sayoc ⁵, Communications Manager</p> <p>Hélène Khan Niazi ⁶, International Agriculture Manager</p> <p>Joyce Woudenberg ⁷, ISHI Technical Coordinator</p> | <p>Khaoula Belhaj-Fragniere ⁸, Regulatory Affairs Manager</p> <p>Ludivine Thomas ⁹, Technical Lead – International Seed Health Initiative (ISHI)</p> <p>Magdalena Rushton ¹⁰, Administrative Assistant</p> <p>Marie Tahmazian ¹¹, Finance, Account, Members Engagement Manager</p> <p>Michael Keller ¹², Secretary General</p> <p>Szonja Csörgő ¹³, Intellectual Property and Legal Affairs Manager</p> <p>Rose Souza Richards ¹⁴, Phytosanitary Affairs Manager</p> |
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