



Who profits from patents on
plant-related inventions?

An oilseed crusher's perspective

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Julie Roiz
Scientific and Regulatory Affairs Manager



38 million tons
oilseed crushed



25 million tons
meals



18 million tons
refined oils

FEDIOL facts and figures



85% of
the
market
covered



24 bn
turn-
over



150
plants



± 35
comp-
anies



20,000
direct
jobs

1. Importance of plant-related innovations in the development of the EU rapeseed chain

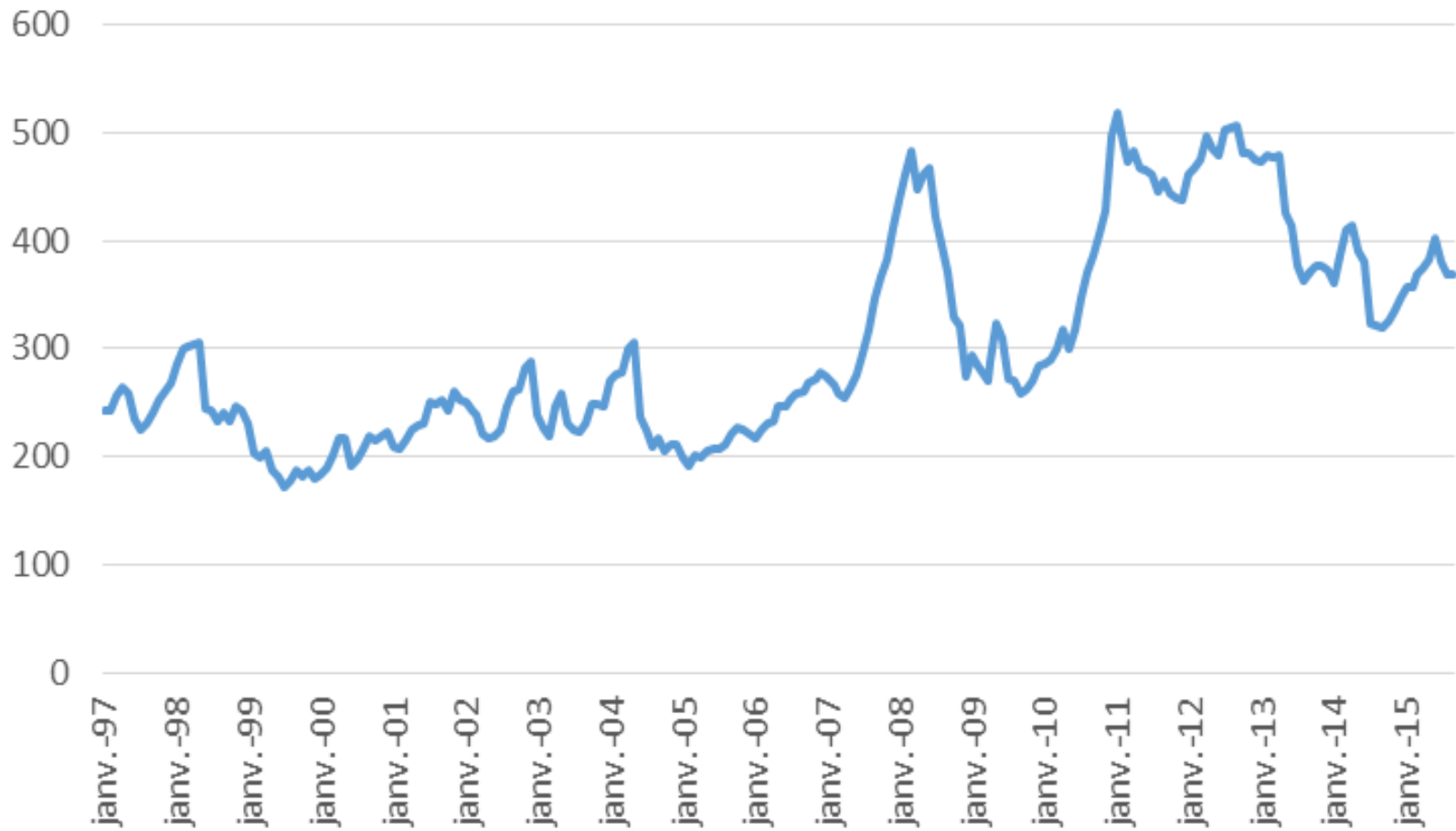
- Oilseed crushing operations and profitability depend on:
 - Availability of raw materials
 - Market demand for the products (oil and meal)
- Development of EU rapeseed crush activity has been very much linked to plant breeding:
 - 1970's: new varieties with lower erucid acid content → increased market opportunity for rapeseed oil in food
 - 1980's: new « 00 » varieties free of erucid acid and low in glucosinolate → increased market opportunity for rapeseed meal in feed
 - 1990's: development of rapeseed hybrids leading to increased yields.

2. Benefits from hybrids & conditions for success

- Rapeseed hybrid technology is one factor which contributed to the extension of the rapeseed crushing capacities in the EU.
- First hybrids
 - Increase of EU rapeseed production
 - But no increase in the demand for oil
 - Because of high glucosinolate content, no valorisation of the meal on the feed market
 - **No impact on EU rapeseed crushing. Export of EU rapeseed.**
- Second hybrids
 - Increase of EU rapeseed production
 - Increase demand for the oil because of biofuels
 - With reduced glucosinolate content, meal can be used in feed
 - **Increase of EU rapeseed crushing capacities: 6 mt in 1990, 15 mt in 2006 and 24 mt in 2014**



Rapeseed delivered Crusher in EUR/Ton



3. Conclusions

- Access to raw materials key for crushing sector.
- Agricultural innovations play an important role.
- Involvement of downstream operators in the development of agricultural innovation is critical.