1st step: From challenges to opportunities – BUSINESS BIRDVIEW

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UK Research and Innovation

What is on agenda?

- What is happening on the market?
- Profitability and why it is important
- STEP 1: Business BirdView
- STEP 2: Business Model Canvas

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What is happening on the MARKET?

Why numbers are important?

Revenue – ALL Costs = Profit

(your time + inputs + infrastructure + certifications + everything else)

Organic FOOD market

18.1 million hectares
(10.9%)
in the EU farmed organically

highest **organic market share worldwide**
DK (11.8%) & CH (11.6%)

no. of **organic producers** in the EU is increasing
435.000 producers
89.379 processors

46.5 billion € of **organic retail sales** in the EU
(EU – 2nd largest single market)

top 3 countries by organic production in million hectares
ES, FR, IT

largest **markets** for organic food are
DE, FR, IT, CH

3,6 % organic market **growth** in the EU

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Organic SEED market

EU organic seed market was valued at around **300 million €** in 2019 (EC)

2036
organic farming have to use organic seeds

Green Deal & Farm2Fork
25 % of the total farmland should be organic but **new CAP is lower for cca 20 %**

the EU organic seed market has been **growing steadily**, driven by increasing **demand for organic products** and **growing awareness**

the exact demand and supply of organic seed in the EU are unknown because of a **lack of data**

the use of organic seed is **particularly low** in Eastern and Southern European countries and in the larger and recently converted organic farms

the **six-fold amount of organic seed would need to be produced** to reach 100 % organic seed

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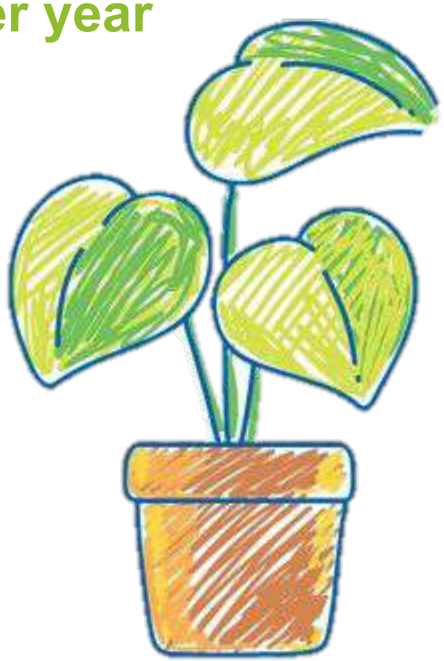
Organic PLANT BREEDING market

current needs for organic breeding are estimated to be at least
100 million € per year

organic plant breeding is an **established niche** in the seed market

most cultivars used in organic agriculture are still derived from conventional plant breeders, even if the seed is produced organically



most breeding initiatives are in **Germany, Switzerland, Austria** and **the Netherlands**

available funds have been growing continuously by about **10 % per year**, and a total volume of 4-5 million € was recently estimated for the 4 countries mentioned above

PROFITABILITY and why it is important

Why profitability matters in organic?

- **Longer production cycles**
- Smaller, more **specialized markets**
- **Certification** costs money and takes time
- **EU Regulation**: derogations phased out by 2036

Organic production is more costly due to …

- LOWER YIELDS
- CERTIFICATION COSTS
- R&D COSTS
- HIGHER LABOUR COSTS
- INPUT COSTS & MARKETING CHANNELS
- SEED COSTS
- LAND & INFRASTRUCTURE
- EQUIPMENT
- SEED STOCK

Market challenges

Fragmented Markets

Small customer base across regions.

Hard to achieve **economies of scale**.

Price competition with conventional seed.

Complex Regulations

EU **seed legislation not always aligned** with organic needs.

High certification costs.

Limited Funding

Too **little public funding** for breeding.

Short funding cycles vs. long breeding timelines.

Weak Value Chain

Value chain **not aligned**.

Lack of data on demand.

Missed opportunities for **joint development**.

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Roadmap to a Viable Business

SWOT analysis
Structured analysis of strengths, weaknesses, opportunities and threats

BIRD VIEW
What are the challenges and opportunities?

BUSINESS CANVAS
Detailed analysis of how the business could work in the market

BUSINESS PLAN
Understanding the numbers behind the business and checking profitability

Your Roadmap to a Viable Business

1

SWOT Analysis

Know your position compared to market

2

Business Birdview

See the whole picture on one page

3

Business Model Canvas

Clarify how value is created

4

Business Plan

Turn strategy into financial reality

5

Funding Strategy

Combine income and funding schemes

Step 1: SWOT analysis

STRENGTH	WEAKNESS
Identifying **internal** attributes that provide an advantage	Recognizing **internal** factors that may hinder progress or performance
OPPORTUNITY	**THREAT**
Identifying **external** factors that the sector can exploit to its advantage	Understanding **external** challenges that could cause trouble

- a strategic planning tool used to identify and understand the **Strengths**, **Weaknesses**, **Opportunities**, and **Threats** related to a business or a specific sector

- provides insights into **market conditions**, competitive dynamics, and potential growth areas

- helps in understanding **consumer needs** and **market trends**

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Step 1: SWOT analysis

Strengths (internal)

- **Financial stability** and **investment** in infrastructure
- **Compliance** with **organic standards** and **certifications**
- Diversification of product range to meet market demands
- Use of advanced technology
- Strong collaborations with research institutions

Weaknesses (internal)

- Recruiting and retaining **qualified personnel**
- Dependence on **subsidies** and **external financial assistance**
- Complex and time-consuming **regulatory requirements**
- Lack of strong **marketing strategies** and online sales
- Low **digitalisation** levels

Opportunities (external)

- Build **collaborations** to access new **knowledge, innovation**, and **markets**
- Invest in **digitalisation** and IT tools
- Invest in a new cultivar type for market diversification
- Invest in services related to agrobiodiversity management to create new **revenue streams**
- EU target: **25% organic farmland** by 2030

Threats (external)

- **Economic fluctuations** and **inflation**
- **Low awareness** and **lack of consciousness** among farmers
- Bureaucratic hurdles and **paperwork**
- The **complexity** and **high costs** of adhering to organic regulations
- **Climate change** disrupting local varieties and trials

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BUSINESS BIRDVIEW concept

STEP 2: Business BirdView

An innovative one-page strategic tool developed by the LiveSeeding project that combines SWOT analysis and Business Model Canvas into a single visual framework.

Challenges of Today

Internal & external bottlenecks holding the business back

Sounds Like Opportunity

Growth opportunities, unique value proposition, customers & channels

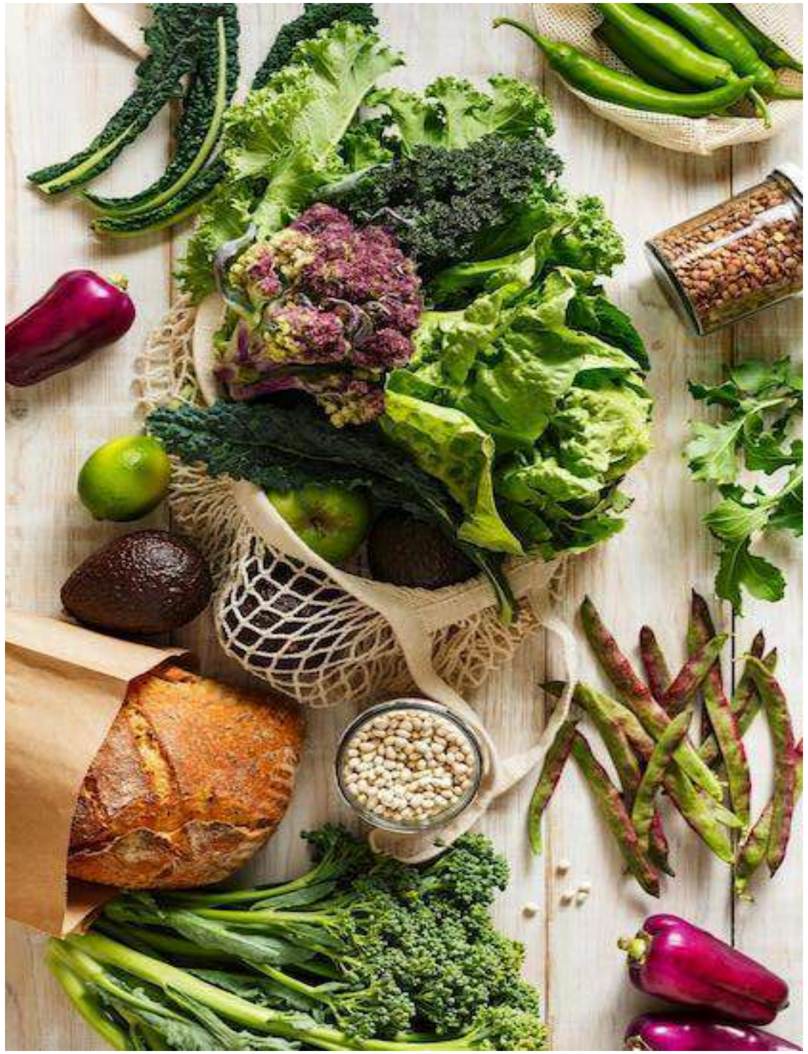
Future is Organic

Revenue streams, profitability & strategic recommendations

The power: seeing everything on one page forces clarity and reveals connections you might miss otherwise.

LiveSeeding analysis

	Typology	Categories
	TYPE OF ORGANIZATION	Company Initiative Research Centre
	TYPE OF ACTIVITY	Seed production and trading Cultivar testing
	CROP TYPE	Vegetable producers Arable producers
	TYPE OF PRODUCTION	Organic production Organic & conventional production

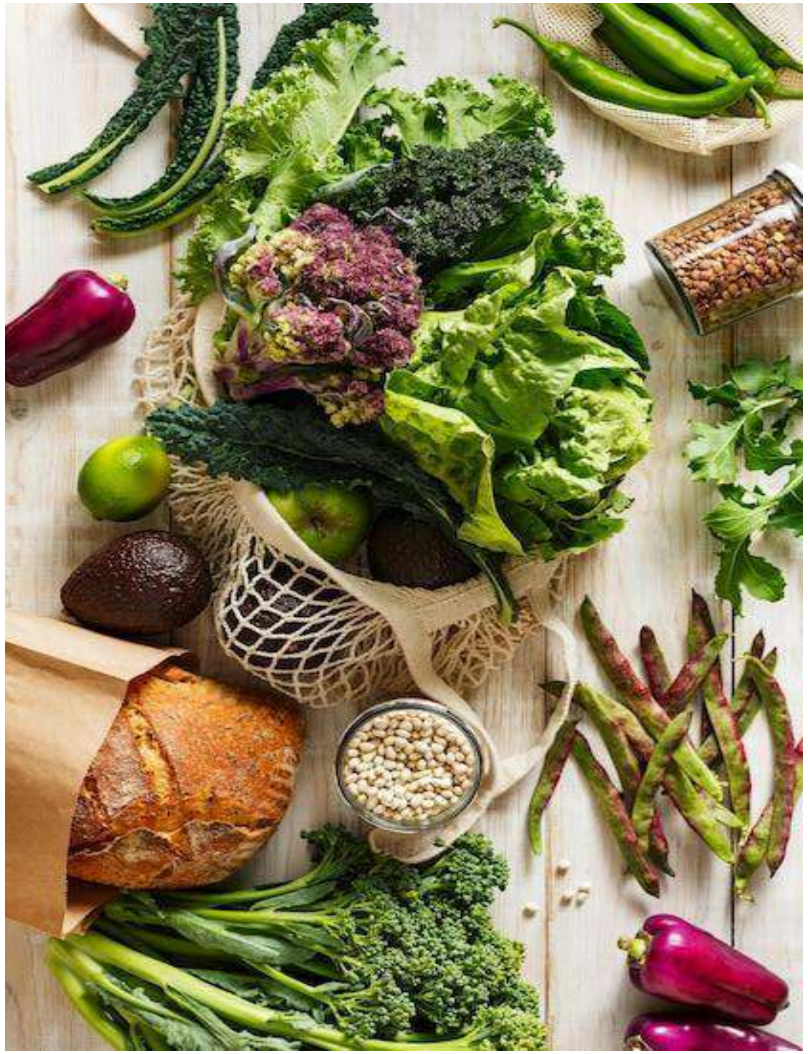


LiveSeeding analysis

WP5 Exploitation: horizontal proliferation and scaling-up organic seed and breeding initiatives

D5.1	Report on bottlenecks and opportunities for the horizontal proliferation and scaling-up of the organic seeds and cultivar testing network
D5.2	Report on financing and governance models for organic breeding initiatives
D5.3	Training materials for organic seed and breeding entrepreneurship training centre
D5.4	Report on the outcome of the European Task Force for OPB financing
D5.5	Business models and business plans for proliferation and scaling-up organic seed, breeding and cultivar testing network

https://liveseeding.eu/deliverables-publications/



STEP 2: Business Birdview

CHALLENGES OF TODAY	SOUNDS LIKE OPPORTUNITY	FUTURE IS ORGANIC
INTERNAL CHALLENGES *what could be internal challenges and bottlenecks*	**OPPORTUNITIES** *what could be internal opportunities* *what could be external opportunities*	**PROFITABILITY** *what are and could be revenue streams*
EXTERNAL CHALLENGES *what could be external challenges and bottlenecks*	**UNIQUE PROPOSITION** *what is USP in this case?* **CUSTOMERS & CHANNELS** *good practices to reach customers* *channels used to sell products*	**RECOMMENDATIONS** *add recommendations*

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CASE: ORGANIC PRODUCTION, REGARDLESS OF SIZE

CHALLENGES OF TODAY

INTERNAL CHALLENGES

- **finding experts** (qualified workforce)
- **non-structured approach to organisation and market presence** (struggle to establish within the organic market segment, difficulty in reaching potential customers and building brand recognition)
- **lack of communication, commercial department and marketing strategy** (low brand visibility)
- **lack of webshop** (threat to expanding market)

EXTERNAL CHALLENGES

- **decreasing government subsidies and uncertainties regarding the regulatory framework** (threat to profitability)
- **new genetic engineering** (companies may follow this way)
- **crisis on organic market** (requires innovative solutions beyond traditional methods)
- **consumer awareness and concern** (can help combat the mislabelling of organic products)
- **lack of subsidy schemes** (threat to further development and investment plan)
- **climate change** (may impact the consistency and reliability of a variety of trials.)
- **competition with big EU competition** (may undermine market presence and visability)
- **a lot of paperwork** → time - consuming
- **economic fulctuations** (impacting seed prices and demand)
- **workforce shortage** (posing a potential long-term sustainability issue)

SOUNDS LIKE OPPORTUNITY

OPPORTUNITIES

INTERNAL

- **investments in new machinery and IT** (ensure product quality, uniformity, and efficiency in production processes)
- **business plan** (proactive approach to operations)
- **strong financial foundation**
- **innovations** (participation in research groups focused on quality farming)

EXTERNAL

- **changes in policy frameworks** (new opportunities for production)
- **direct financing through business activities** (necessary to enhance and promote the use of organic seeds)
- **growing demand for organic products** (opportunity to explore and enter new international markets)
- **government funding for research** (leads to developing new varieties adapted to new environmental conditions)

UNIQUE PROPOSITION

100% organic seed, high quality seeds with good germination rates

CUSTOMERS & CHANNELS

CUSTOMERS

- hobby gardeners
- professional producers
- garden centres
- cooperatives

CHANNELS

- online sales
- direct sales
- international and local markets
- field days

FUTURE IS ORGANIC

PROFITABILITY

- **seed sales** (various costumers and ways of selling)
- **field days**
- **visits to customers** (to ensure seed quality and production standards)
- **testing station** (testing various varieties covering extensive geographic and environmental conditions)
- **R&D projects** (developing new seed varieties and technologies)
- **collaboration with agricultural schools, students, teachers** (reach more customers, promote crop varieties)
- **educational workshop for farmers**
- **service fees for research projects and meetings**

RECOMMENDATIONS

- **partnership and connections with stakeholders**
- **production of non hybrid seeds** (a clear advantage as the organic market relies on conventional varieties)
- **well-established marketing strategy** (tailored marketing strategy)
- **focus on enhancing the overall customer experience** (leads to increased loyalty and positive word-of-mouth recommendations)
- **developing varieties that are well-adapted to organic farming methods**
- **raise awareness** (helps combat the mislabelling of organic products)
- **investments in machinery** (to meet increased market demand and optimize operations)
- **develop a portfolio encompassing a wide range of crops and varieties**
- **annually develop business plan**
- **generate new client groups**
- **emphasize quality over quantity**

Where does profit come from?

SEED PRODUCTION

- Selling seeds (**export**)
- Participation in **R&D**
- **Digital platforms** (sales)
- **Certification fees**
- Collaborations on multiple levels

CULTIVAR TESTING

- Cultivar sales (**export**)
- Participation in **R&D**
- Digital platforms (sales, education)
- **Data analysis**
- Certification fees

RESEARCH CENTER

- Private and **public funding**
- Collaboration with national and international entities
- **Certification fees**
- Partnership with stakeholders

COMPANY

- Selling seeds (**export**)
- Consulting services, **educational workshop**, certification fees
- **Research & Development**
- Specialty and value-added products

INITIATIVE

- Selling seeds (**export**)
- **Educational workshops** and trainings
- Service fees for research projects and **field days**

ARABLE PRODUCTION

- Collaborations with companies, producers and stakeholders
- **Training station funds**
- Service fee for **R&D**

VEGETABLE SEED PRODUCTION

- Collaborations and good relationships at multiple levels
- Selling seeds
- **Fees from certification** and educational workshops and trainings
- Participation in **R&D projects**
- Testing stations

Unique selling point

SEED PRODUCTION
A unique focus on **organic seed varieties**, emphasizing local heritage and sustainable practices

CULTIVAR TESTING
Unique **cultivar evaluation method** and extensive data analysis

RESEARCH CENTER
Long-standing expertise and leadership in agricultural research, especially in **cultivars tailored for organic farming** practices

COMPANY
S — effective management, only project of its kind. **M** — commitment to innovation and sustainable development. **L** — world's leading, own breeding program and testing stations

INITIATIVE
Expertise in **preserving local plant diversity** through strong regional partnership and innovative, biodiversity-focused agricultural practices

ARABLE PRODUCTION
Unique **cultivar evaluation**, extensive experience and strong farmer network

VEGETABLE SEED PRODUCERS
Offering professional seeds of **unique varieties** while preserving biodiversity, being the only one in the area

ORGANIC PRODUCTION
100% organic high-quality seeds with good germination rates

ORGANIC & CONVENTIONAL PRODUCTION
Leading company with a strategy to mitigate negative market impacts, **being adaptable**, the company appeals to broader customer base, including conventional and organic farmers

Key takeaways

1. **Recognise both internal and external pressures**
   Organic seed businesses face internal challenges like low visibility, alongside external pressures — market fluctuations and complex regulations.

2. **Invest in collaboration and partnerships**
   Partnerships with farmers, research organisations, and universities reduce costs, support innovation, and open access to knowledge and new markets.

3. **Develop a clear unique value proposition**
   Local adaptation, seed health, or organic cultivar type helps businesses stand out. Investing in marketing, communication, and customer relationships is essential to increase visibility and sales.

4. **Improve efficiency with training and digital tools**
   Better internal planning improves seed production, management, and sales, while helping businesses prepare for risks and adapt to change.

5. **Diversify income streams and funding sources**
   Seed sales, advisory services, and training activities increase financial stability and make long-term investments possible.

6. **Understand customers and explore new markets**
   Use the right sales channels, diversify products, and stay informed about sector trends to improve competitiveness and secure sustainable growth.

Lessons learned

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Seed production	Cultivar testing

Challenges of today

Seed production	Cultivar testing
Internal & external Skilled labour shortages, high organic production costs, scalability issues, seasonal workforce, certification burden, market competition	**Internal & external** Bureaucratic inefficiencies, reliance on public grants, staff shortages, communication gaps, reduced government support, political shifts

Sounds like opportunity

Both sectors: collaboration and partnerships as critical growth avenues

Seed production	Cultivar testing
International exports, technological advancements, R&D for climate-adapted varieties, EU funding for innovation	Digital platforms for data analysis, growing organic demand, international partnerships, agricultural technology

Future is organic — profitability

Seed production	Cultivar testing
Seed sales (domestic & international), R&D, certification fees, e-commerce, partnerships	Cultivar sales & export, certification fees, educational workshops, digital analytics, training programmes

Recommendations

Seed production	Cultivar testing
Invest in agri-tech, adopt digital platforms, advocate for supportive policies, diversify funding, adapt to climate change, expand internationally	Adopt digital technologies, train workers, launch organic awareness campaigns, track trends, enhance visibility, diversify funding sources

BUSINESS BIRDVIEW exercise

STEP 2: Business BirdView analysis

CHALLENGES OF TODAY

INTERNAL CHALLENGES

- What could be internal challenges and bottlenecks?
- *e.g. finding experts, low brand visibility, high production costs*

EXTERNAL CHALLENGES

- What could be external challenges and bottlenecks?
- *e.g. fluctuation in the market demand, rising prices, inflation, climate change*

SOUNDS LIKE OPPORTUNITY

OPPORTUNITIES

- What could be internal opportunities?
- *e.g. own breeding program, varieties adapted to climate change*
- What could be external opportunities?
- *e.g. collaboration, increasing public awareness*

UNIQUE PROPOSITION

- What is USP in this case?
- *e.g. not having competitors, high-quality seed, 100% organic*

CUSTOMERS & CHANNELS

- Target customers?
- *e.g. hobby gardeners, professionals*
- Channels used to reach customers
- *e.g. field days, international market, seed shops, web*

FUTURE IS ORGANIC

PROFITABILITY

- What are and could be revenue streams?
- *e.g. seed sales, hosting open field days, advisory services*

RECOMMENDATIONS

- Reccomendations for the case
- *e.g. investements in machinery, quality over quantity, raise awareness, adapt to climate and environmental changes, well adapted varieties*

Internal Challenges

What could be internal challenges and bottlenecks in your business?

1. Do you have **enough qualified staff** to manage organic seed production, and is it difficult to find or retain skilled workers?
2. Are your **production costs** - especially for organic certification, manual labour, and quality testing - putting pressure on your margins?
3. Do you have a **clear commercial strategy** and sufficient brand visibility, or is your business largely unknown beyond your immediate network?
4. Is your **technological infrastructure adequate**, or are you still relying on manual processes where digital tools could improve efficiency?

Examples from the sector:

Difficulty finding experts willing to work in rural areas; low brand visibility due to lack of marketing budget; High production costs driven by manual weeding and seed cleaning; No webshop or online sales channel; Ageing workforce with no succession plan; Limited drying or storage infrastructure.

External Challenges

What could be external challenges and bottlenecks affecting your business?

1. How are **fluctuations in market** demand and rising input costs affecting your ability to plan and invest?
2. Are **regulatory requirements** - variety registration, organic certification, EU seed legislation - creating administrative or financial burdens?
3. Is **competition from large-scale conventional seed companies** or imported seed making it harder to maintain your market position?

Examples from the sector:

Inflation and rising energy costs squeezing margins; Complex and frequently changing organic certification procedures; Climate change causing unpredictable yields and crop failures; Decreasing government subsidies for organic farming; Competition from multinational seed companies entering the organic market; Consumers unaware of the difference between organic and conventional seed.

SOUNDS LIKE OPPORTUNITY

Opportunities

What could be internal and external opportunities for your business?

1. **Are there new markets -** geographically or in terms of customer segments - that you could reach with your current products?
2. Could you **develop new seed varieties or populations** that respond to demand for climate-resilient, locally adapted crops?
3. Are there **collaboration opportunities** with research institutions, farmer networks, or other seed producers?
4. Could **EU funding programmes**, national subsidies, or private partnerships support your innovation plans?

Examples from the sector:

Own breeding programme for climate-adapted varieties; Increasing public awareness and demand for organic food; Participation in EU-funded research and innovation projects; Digital platforms enabling direct sales to wider customer base; Collaboration with organic farmer cooperatives; Growing interest in Organic Heterogeneous Material (OHM).

SOUNDS LIKE OPPORTUNITY

Unique Selling Proposition

What makes your business different from competitors?

1. What do you offer that **no one else in your area or market segment** provides - a specific variety, quality standard, service, or story?
2. **Why should a customer choose your seed** over a competitor's - what is the concrete benefit they receive?
3. Does your USP align with what your target customers actually value and are **willing to pay for**?

Examples from the sector:

100% organic seed with high germination rates and full traceability; The only provider of certain rare heirloom or locally adapted varieties in your region; Professional agronomic support and advice included with seed purchase; Seeds bred and tested specifically under organic farming conditions; Transparent production process that customers can visit and verify; Commitment to biodiversity and open-pollinated varieties.

SOUNDS LIKE OPPORTUNITY

Customers & Channels

Who are your target customers and how do you reach them?

1. Who are your **current customers**, and are there additional segments you have not yet explored - processors, institutions, urban farms, export?
2. Which **sales channels are most effective today**, and which new channels could you test - webshop, fairs, direct contracts, subscriptions?
3. How do your **customers prefer to discover**, evaluate, and purchase seed - and are you present in those spaces?

Examples from the sector:

Professional organic farmers seeking certified, locally adapted seed; Hobby gardeners interested in rare and heritage varieties; Agricultural schools and research stations needing trial material; Direct sales through field days, farm visits, and demo plots; Webshop reaching international customers; Seed fairs and organic trade events.

Profitability

What are and could be your revenue streams?

1. Beyond seed sales, **what other products or services could generate income** - training, consulting, certification, data, licensing?
2. Are you capturing the full value of your organic certification in your **pricing,** or undercharging relative to quality?
3. Could partnerships, cooperative models, or subscription services create more stable and **predictable income**?

Examples from the sector:

Domestic and international seed sales as primary revenue; Income from hosting field days, workshops, and training programmes; Consulting and advisory services for farmers transitioning to organic; Revenue from R&D projects and breeding programmes; Licensing or royalties from organic seed varieties; Membership fees or cooperative shared services.

Recommendations

What strategic actions should you prioritise for sustainable growth?

1. What is the single most impactful investment you could make in the next 12 months — technology, marketing, infrastructure, or people?
2. How can you reduce your dependency on a single funding source or a single customer segment?
3. Are you actively preparing your business for the regulatory changes coming by 2036, when organic seed use becomes mandatory?

Examples from the sector:

Invest in digital tools to reduce manual labour costs and improve efficiency; Develop a marketing and communication strategy for brand visibility; Form partnerships with research organisations for co-funded innovation; Diversify portfolio to include training, advisory, and seed testing services; Build a business plan with realistic financial projections; Advocate for supportive policies by engaging with policymakers.

STEP 2: Business BirdView analysis

CHALLENGES OF TODAY	SOUNDS LIKE OPPORTUNITY	FUTURE IS ORGANIC
INTERNAL CHALLENGES - What could be internal challenges and bottlenecks? - *e.g. finding experts, low brand visibility, high production costs*	**OPPORTUNITIES** - What could be internal opportunities? - *e.g. own breeding program, varieties adapted to climate change* - What could be external opportunities? - *e.g. collaboration, increasing public awareness*	**PROFITABILITY** - What are and could be revenue streams? - *e.g. seed sales, hosting open field days, advisory services*
EXTERNAL CHALLENGES - What could be external challenges and bottlenecks? - *e.g. fluctuation in the market demand, rising prices, inflation, climate change*	**UNIQUE PROPOSITION** - What is USP in this case? - *e.g. not having competitors, high-quality seed, 100% organic* **CUSTOMERS & CHANNELS** - Target customers? - *e.g. hobby gardeners, professionals* - Channels used to reach customers - *e.g. field days, international market, seed shops, web*	**RECOMMENDATIONS** - Reccomendations for the case - *e.g. investements in machinery, quality over quantity, raise awareness, adapt to climate and environmental changes, well adapted varieties*


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