

Seed industry requirements

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Temperate Legumes in Southern America Market Overview:

- Argentina, Chile and Uruguay having good availability of quality seeds. A well established PBR system and government institutions are in general doing a good job.
- Brasil and Chile not having a pool of good genetics and poor quality seeds. PBR on temperate legumes is a problem and government is very bureaucratic.

Alfalfa: More than 5 million hectares and 10 000MT of seed sold every year. More than 350 cultivars, 90% winter active, 20% local research, 80% seed consumption from USA, Australia and Europe. Most important is Argentina and expansion to the north and east.

White Clover: Utilize in most of the pastures mix, with more than 1 million hectares and 1 200 MT of seed sold every year. Around 25 cultivars available but only a couple most important, 20-25% seed imported, 60% labeled seed and 15-20% “white bag” seed. Good seed production from Argentina and Uruguay.

Lotus corniculatus: Utilize in poor, shallow and high acid soils. More than 1,6 million hectares and 5 000 MT of seed sold per year. Around 6 cultivars available but only two are most used. All seed is produced in the region and 80% is done in Uruguay. 20% is labeled seed and 80% is “white bag”. 100% of research and development has been done in the region.

Market Trends: Important forage legume in SA, widely used in different climates and soils. High nutritive value and do not cause bloat. Market appears to be expanding. Exports to Canada, USA and Europe. Propriety cultivars with improved agronomics performance and persistence.

Lotus tenuis: Going into low lands and flooding areas; adapted to low fertility and salinity. More than 200 000 hectares and 500 MT of seed sold per year. 6 cultivars available but 2 are most common. Most used in Argentina and all the seed production done there. 20% labeled seed and 80% “white bag”.

Lotus subbiflorus: Utilize in poor and shallow soils. More than 100 000 hectares and 500 MT of seed sold per year. One cultivar available (from Uruguay). All seed is produced in the region (Uruguay). 20% labeled seed and 80% “white bag”. 100% research done locally.

Lotus pedunculatus: Poorly drained soils in humid areas. More than 20 000 hectares and 50 MT of seed sold per year. Two cultivars are available from overseas research. Seed produced in the region. Mainly used in the northeast of Uruguay. 90% labeled seed.

Demand of new cultivars for Lotus spp: Expansion of grain crops over better soils, Greater rainfall variability, Strategic role in long-term pasture mixtures for beef production, Adoption of improved establishment and pasture management technology, Increased use in marginal areas (Semiarid Pampa, Subtropical) where alfalfa does not perform, Mixtures with tall fescue

and cocksfoot to improve summer production, Short-lived pasture phase in rotation with soybean and maize for silage, Soil improvement in crop-pasture rotations

General Comments: *Growth of agriculture.* Seed production vs. Commodities. Displacement of pastures to marginal soils. Increase of production costs. Occasional harvest.