Tomato grafting Young Plant Business Trends

Presentations

January 28-29 Almería 2015





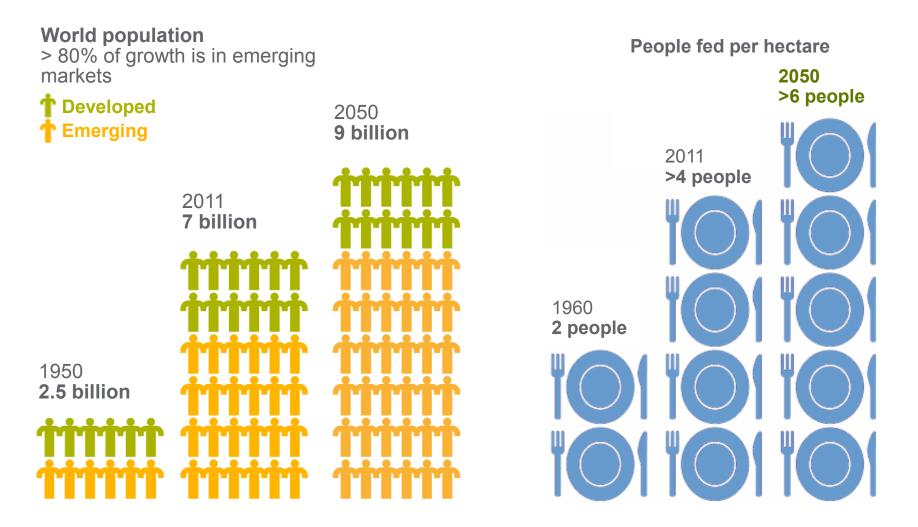
syngenta

Syngenta solutions in production technology

Massimo Enzo

Syngenta | Tomato Grafting – Young Plant Business Trends Almería, 28 January, 2015

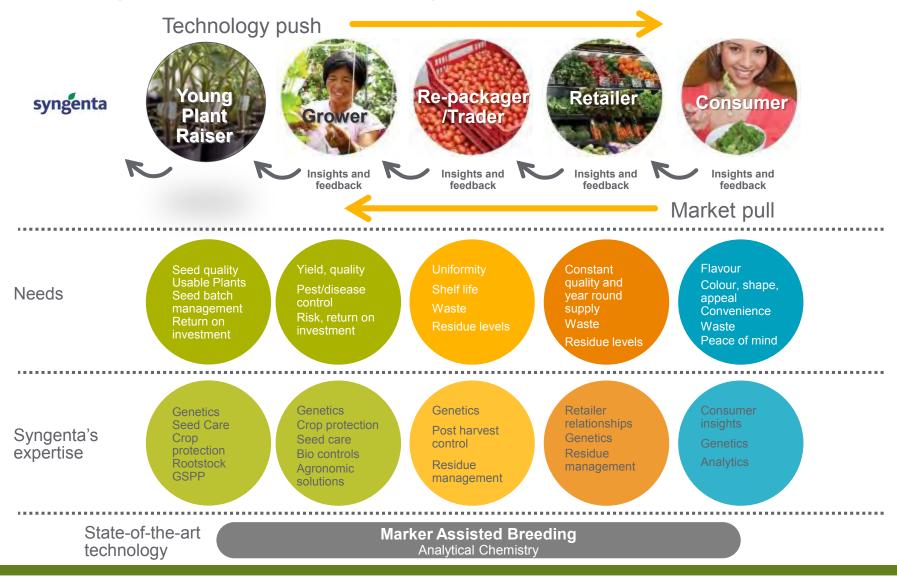
Demand for food is driven by population growth and rising calorie consumption



Source: FAO, Syngenta analysis

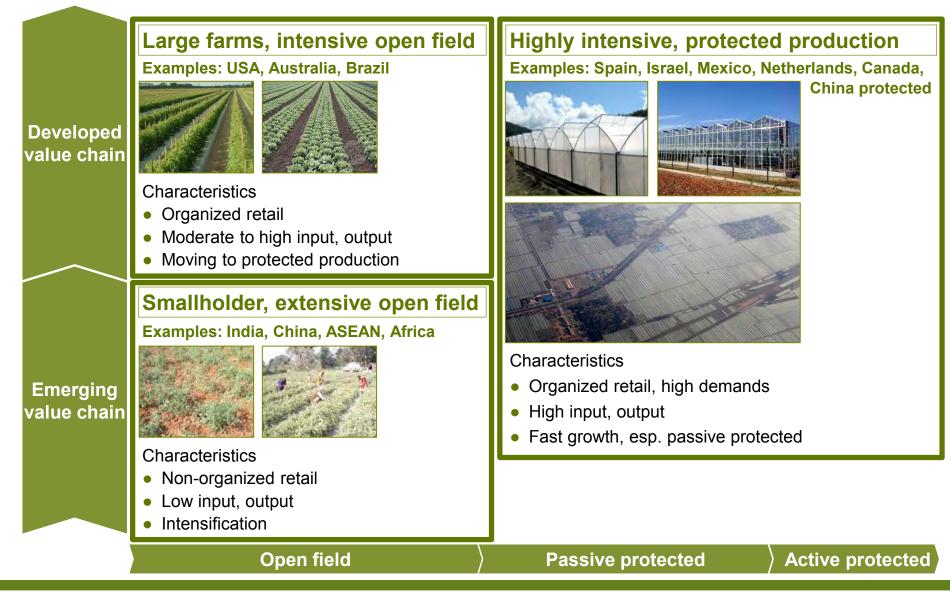


Different needs in the value chain require specific servicing A variety of needs, addressed by our expertise





Vegetables: diverse growing systems and challenges



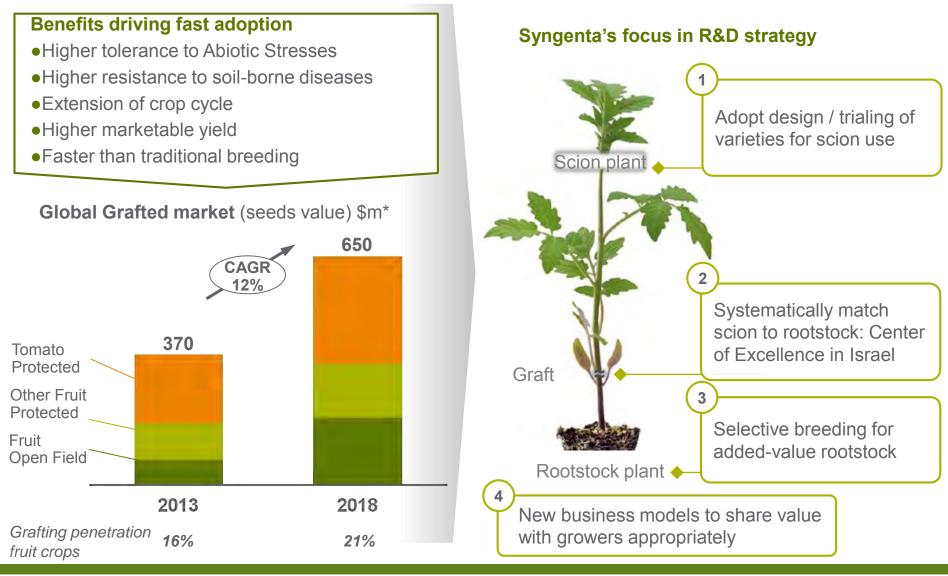


Integrated solutions can address the multiple challenges faced by vegetable growers

Crop establishment	 Leading seed treatment portfolio Biotic and Abiotic stress management through rootstock
Integrated crop management	Integrated solutions for sustainable pest and disease management
Value added produce	Molecular breeding platform for produce with food chain benefits
Smallholder intensification	Supporting smallholders in emerging markets to intensify vegetable production



Grafting: fast-growing innovation in high value vegetables meeting value chain needs





Source: Syngenta estimates



TOMATO ROOTSTOCK GRAFTING

Abiotic stress management for long-cycle crops, in unheated greenhouses.



Syngenta | Tomato Grafting – Young Plant Business Trends Almería, 28 January, 2015

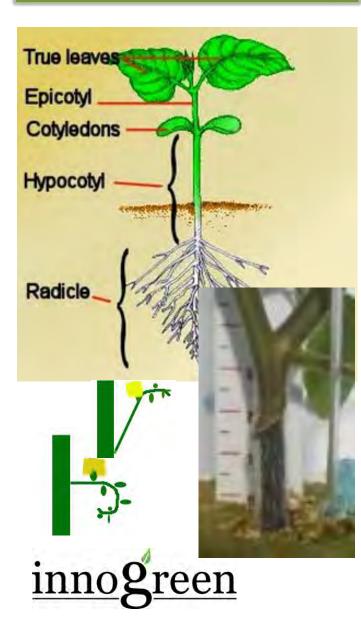
Structure of the presentation



- Vocabulary
- Optimized crop techniques towards 2020
- Managing abiotic stress with grafted plants
- The adapted kind of grafting



Vocabulary



- Epicotyl:
- Hypocotyl:
- Cotyledons:
- Rootstock:
 - Scion: fruit bearing variety
- Passive greenhouse: unheated
- Xylem:

- Phloem:
- Vigour:
- Vegetative:
- Generative:

tube in the plant transporting minerals and water upwards

stem above cotyledons

stem under cotyledons

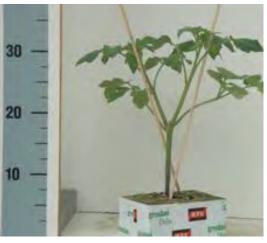
root bearing variety

reserve tissue

- tube in the plant transporting sugar and water downwards
- large stem diameter with blue
- little flowering on head, upright truss stem
- abundant flowering on head, curved truss stem

Vocabulary





Which plant brings your client money?

- •Big leaves or thick leaves?
- •Short plants or slim plants?
- •2 or 6 week old plant?
- •Leaves under first truss: 6 or 9?
- Stone wool block or peat plug?
- •Plant weight: 12 or 30 grams?
- •Grafted or not?
- •Topped on cotyledons, on 2nd leaf or on 3rd leaf?
- •2 stems or 3 stems/rootstock?



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Optimizing crop techniques towards 2020.

What does the customer want from the producer?

- -Adapt production to commercial agreements; a more reliable production flow in winter.
- -Maintain quality during periods of stress; low temperatures, high relative humidity...

Reduce cost price;
 through increased production/m² and a longer production period.

What winning options does the producer want?

=> to be the preferred supplier; offer reliability, even in difficult conditions; ensure profitability;



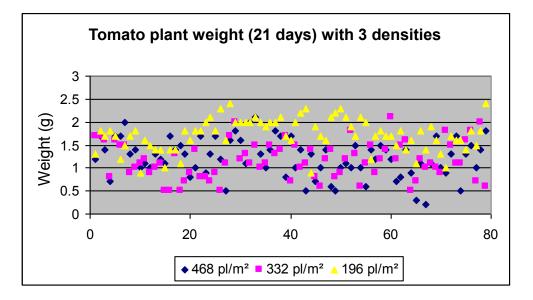
Optimizing crop techniques towards 2020 - 1

•More sensors in the greenhouse => greater demand for homogeneous plants Selecting plants: 30% more homogeneity results in 10% more production	
•Higher substrate, less volume => faster steering, better root in winter due to higher oxygen level Wider leaves at first: larger block; extra 100g substrate gives 1kg/m ² more production More leaves at first: 6-9 leaves under first truss (darker and warmer)	
•Leaf juice analysis => nutrients available in the plant 30 to 50% less nitrogen concentration at first in grafted plants, less calcium in fruit/leaves	



Optimizing crop techniques towards 2020 - 2

•Soil tensiometer and suction pump => less irrigation problems, irrigation when required by plant	
 From general rootstock to soil/greenhouse adapted rootstock Weight of a young plant indicates production 	
1 gram heavier (50 days, NG) = 8% more production (Klapwijk,1987 and Welles, 1989)	

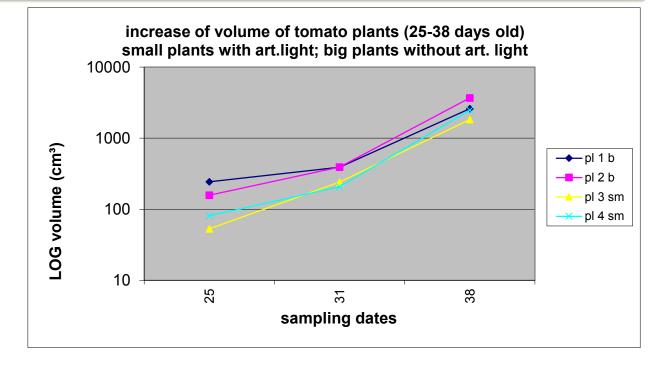




Optimizing crop techniques towards 2020 - 3



•Crop registration is objective management information Measurement shows plant response 1 week earlier than grower's eyes. Logarithmic volume growth between 14 and 40 days (InnoGreen 2009)





Grafting-> no longer needed to overcome root problems (fusarium, verticillium, corky root... nematodes)

Grafting leads to more vigour for:

More numerous, bifurcated roots => better uptake => higher fruit quality More growth => more resistance to diseases/stress More vigour => more flowers => easier pruning => better quality

Grafting gives a better plant balance:

Better, faster setting: larger fruits Faster recovery after loaded plants Faster setting in winter climate



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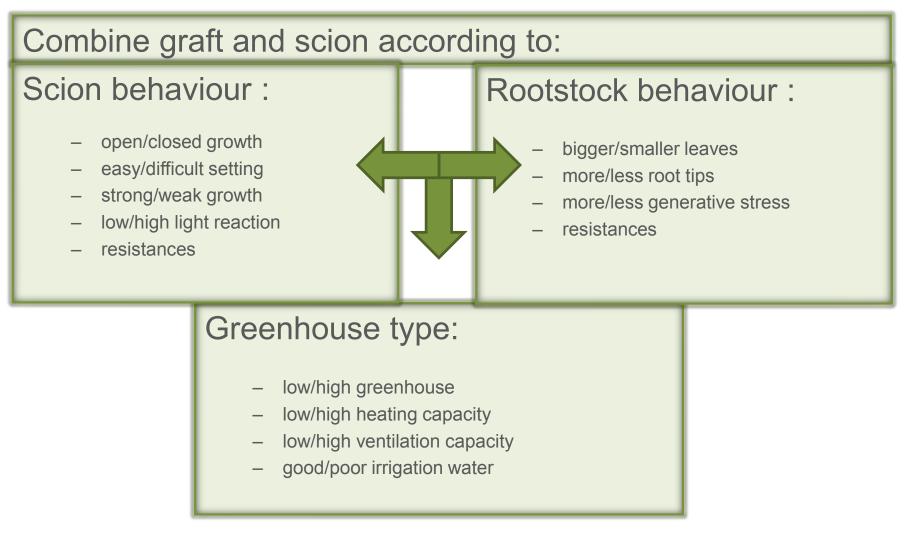




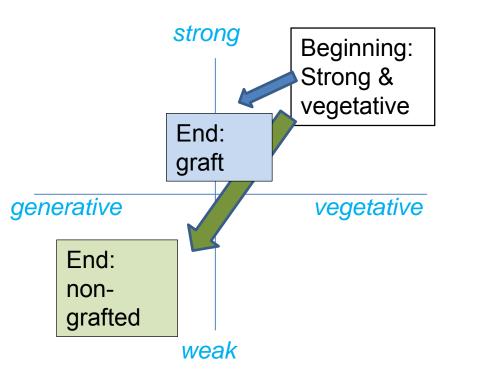
Recognising a well grafted young plant

- Diameter of graft and scion identical
- Equal shoots
- Power: anthocyanin on stem and large stem diameter
- Generative Balance: abundant flowering on the head and curved truss
- Bifurcated roots, completely rooted









General management of grafted cropping

•Grafting results in more vigour but also more vegetative growth

•This is compensated by

- More DIF (T°CD / T°CN)
- Higher EC
- Boost at midday
- Stable and balanced growth leads to increased production







From client wish to objective propagation product

•FROM CLIENT WISH:

- big & short,
- fast, flowering within 1 week,
- good roots,
- homogeneous,
- X flowers/truss …

•TO PROPAGATOR PRODUCT:

- weight & volume,
- speed,
- balance & vigour,
- leaf colour,
- blue stem …

•HOW TO MAKE THE PRODUCT:

- measuring,
- analysing,
- planning

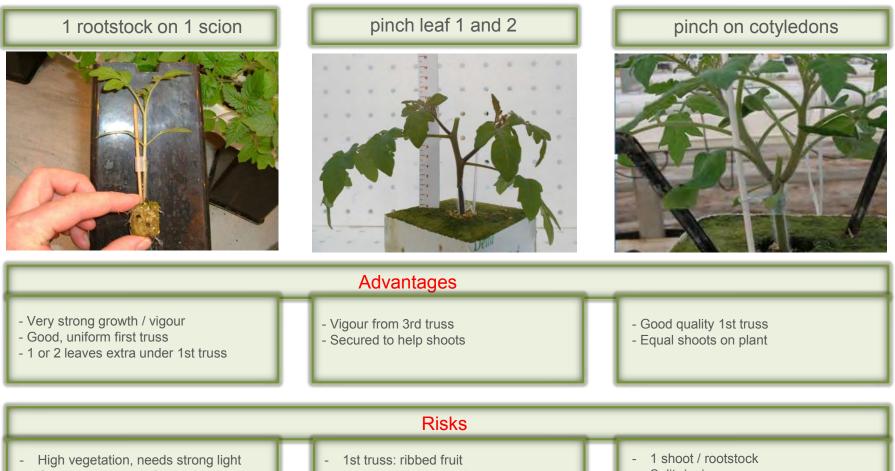
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The adapted kind of grafting - Type of young plant



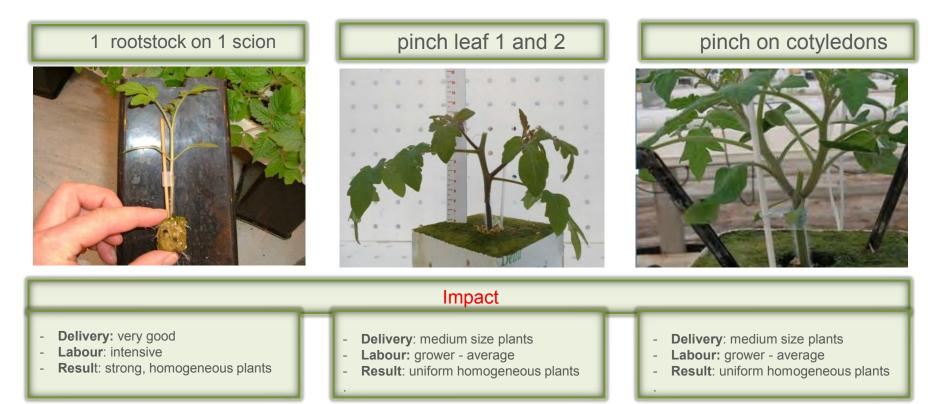
Considerable need for nutrients _

Irregular shoots on plant _

- Split ripping -
- Less uniformity between plants -
- YPL raising less successful in low light



The adapted kind of grafting to a young plant



General risks

- Delay in earliness
- Headless
- Uniformity of graft/scion
- Increased hygiene/risk management
- More generative actions needed in the crop



Conclusions

- Grafting combines the advantages of two varieties.
- Intuition in propagation and growing will be enhanced by objective measurements, resulting in better planning.
- Grafting techniques and rootstock will depend on the type of greenhouse and the available infrastructure.
- Grafting has already led to a steady flow of products during winter, to meet demand from supermarkets.
- New grafting applications will further improve sub-optimal growing conditions.





<u>Thank you!</u>



What are the prospects for Young tomato plant raising in 2020?

Ewald de Koning Plantenkwekerij Van der Lugt





- 1. History to 2015 "Plantenkwekerij Van der Lugt" young plant raising.
- Customer and market needs in Northern Europe.
 Young plant innovations during the last 10 years at Van der Lugt.
- 3. Trends in young plant raising towards 2020.

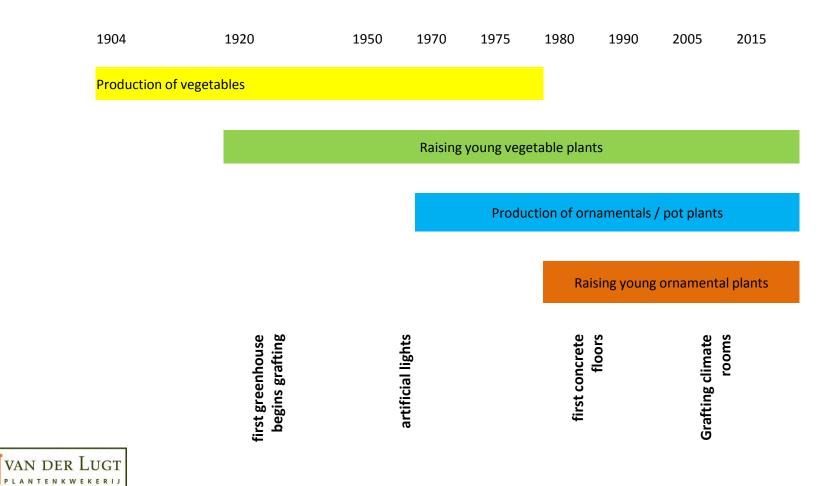


• Founded in 1904 as a vegetable producer.

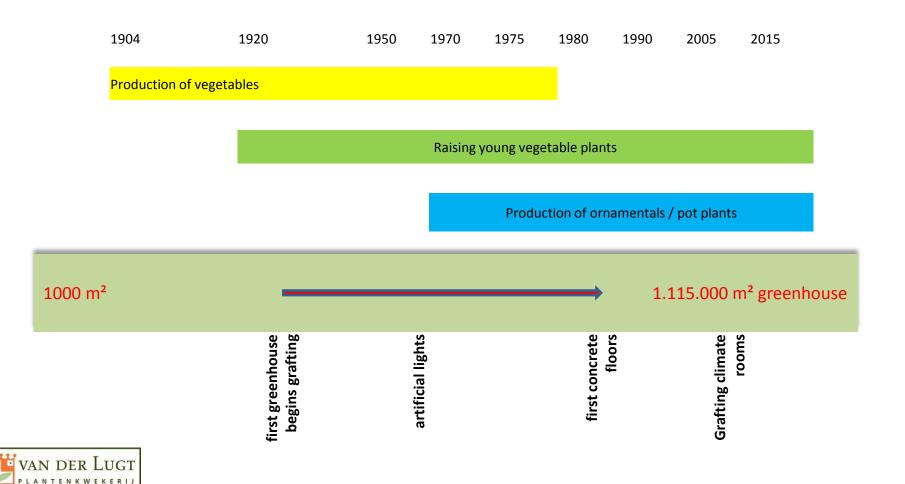




- Founded in 1904 as a vegetable producer.
- In 1920 it began to raise young plants for vegetable growers.



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1. Core business:

12 million young vegetable plants.

- Grafted tomatoes
- Grafted eggplant
- Cucumber
- Grafted cucumber
- Sweet pepper
- 2. Out of season products:

Pot plants / Fruit carrying vegetable plants "Snacker Funfoods" consumer market Young ornamental plants

- Border plants
- Pansy / Primrose

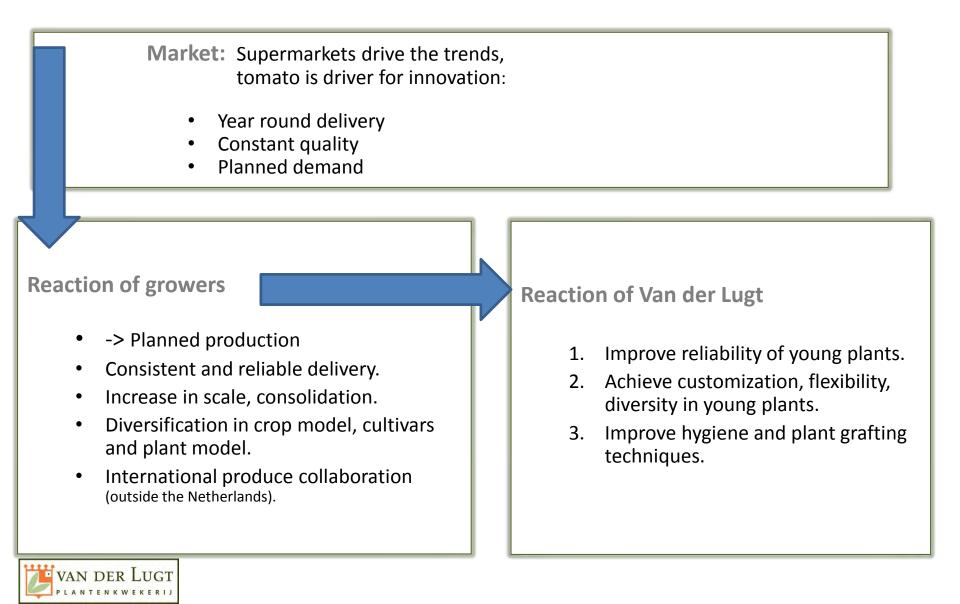




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Customer and market needs in Northern Europe / grower needs over last 10 years.



Young plant innovations in the last 10 years at Van der Lugt.

- 1. Improve reliability of young plants.
 - Knowledge of growers, growers' needs.
 - Controlled growth conditions: climate and crop protection.
 - Germination tests = reliable supply.
 - Climate rooms after grafting = reliability.
 - Mechanical seedling grading = uniformity.
 - Track & Trace system.

VAN DER LUG



Young plant innovations in the last 10 years at Van der Lugt.

- 2. Achieve customization, flexibility, diversity in young plants.
- Communication

(Customized flexible production)

- Order system / all order details agreed by customer / all details available in the produce department.
- Customer portal internet connection.
- Product plant evolution via pictures available on portal.
- Stepless pot spreading machines 4 to 50 plants/m2.
- Open costs calculation requires registration of system labour.
- Cooperation with another plant raiser WPK for consolidated customers / orders.





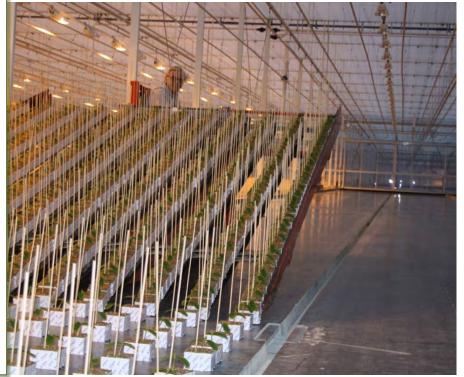


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Young plant innovations last 10 years Van der Lught

- 3. Improve hygiene and plant grafting techniques.
- Hygiene protocol based on GSPP and risk management.
 - Water
 - People
 - Seeds
 - Materials
- GSPP certified seed.
- Recycling, cleaning and disinfection of water.
- Seedling trays used just once.
- Cleaning/disinfection equipment for crates and trays.
- Scrubber-Sweepers for disinfection of floors.
- Hygiene ports at entrances / clothes.

Every season! Every crop!



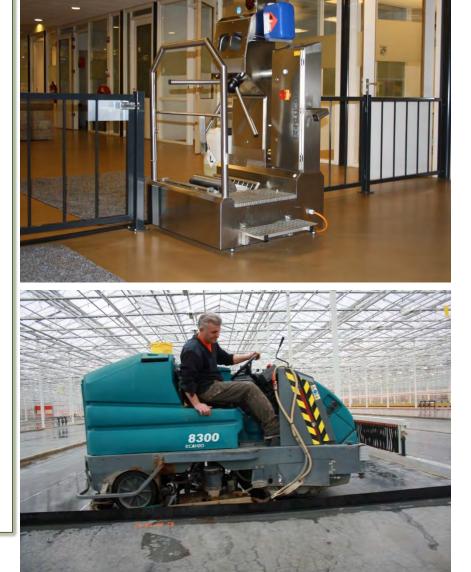




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Trends for young plant raising towards 2020.

1. Technology.

2. Crop techniques.

3. Market development.





Trends for young plant raising towards 2020.

1. Technology.

- Measurement of plant quality at delivery.
 - ✓ Weight
 - ✓ Flowering
 - Machine sorting seedlings with optical technology, more effective than grower's eye.
 - Grafting robot.
 - LED light.
- 2. Crop techniques.
 - Innovative pinching and grafting techniques for double heads.
 - Diversification of rootstock.





Trends for young plant raising towards 2020.

- 3. Market development.
 - Restriction on use of chemicals and discharging.
 - Increase in substrate and longer cycle in Southern Europe.
 - Increase in long cycle leads to more yield/ha = reduction of ha = reduction in total no. of tomato plants.
 - Increase in grafted young plants = increase in plant value.
 - Cooperation consolidation between plantraisers
 - \checkmark Consolidation to specialize.
 - ✓ Specialize and deal with large volumes inside country.
 - ✓ Northern-Southern Europe: entry into growing markets.





Conclusions

- Supermarkets drive the trends.
- Growers' demands = improve stability and reliability in young plants.
- Growers' needs require specialization in the YPR business.
- Outcome is grafted plants of high quality.
- For good grafting results:
 - ✓ Good hygiene
 - ✓ Stable growth conditions and knowledge for reliable planning
 - Uniform plants thanks to mechanized sorting of seedlings



A winning scion/rootstock combination: An example from Spain

FRANCISCO JOSÉ RODRÍGUEZ NOGUERÓN



Syngenta | Tomato Grafting – Young Plant Business Trends Almería, 28 January, 2015

Spain is Europe's orchard and the tomato is the most important vegetable crop, leveraging cutting edge PGH technology

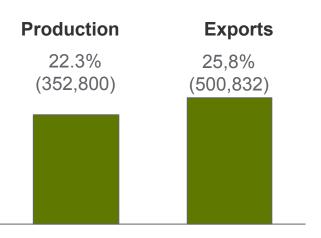
Spain provides Europe with key vegetables



Vegetable Exports

Tomatoes represent over 20% of vegetable production & export value

<u>% Tomato value in €K / total</u> <u>vegetables</u>



Tomato production in Spain is innovative and leverages cutting edge technology

- Rapid adoption of innovative solutions that ensure profitability and differentiation
- 10% of total acreage is for innovative tomatoes
- 80% IPM
- 70% production is grafted





Producers face strong challenges: they must meet the market's demands for break-through solutions while assuring their profitability

Producers: Key challenges

<u>Market</u>

- Year round supply
- Consistent quality
- Sustainability
- Innovation

Complexity

- Legal regulation
- Labour regulation
- MRL
 - IPM

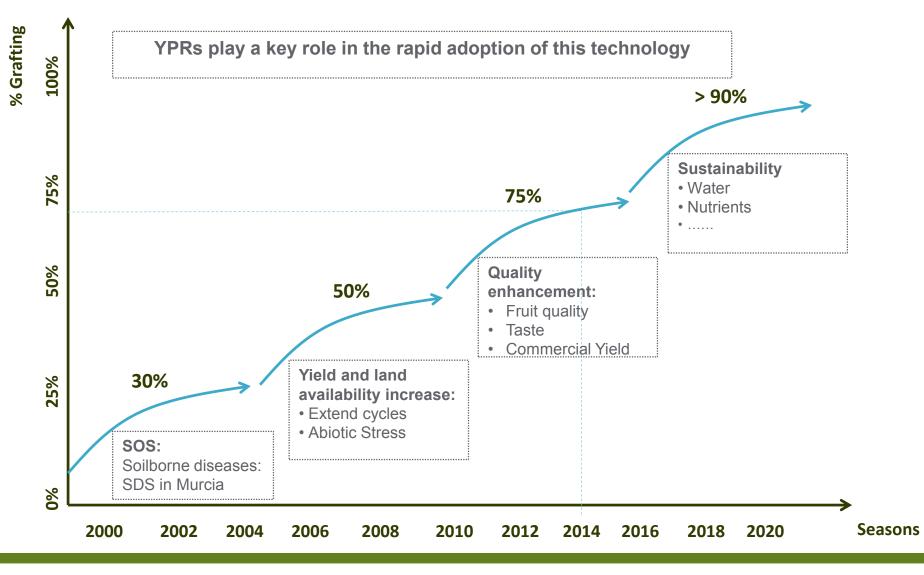


Profitability

- Profitability
- Market access
- Cash flow management
- Differentiation
 - Sustainability

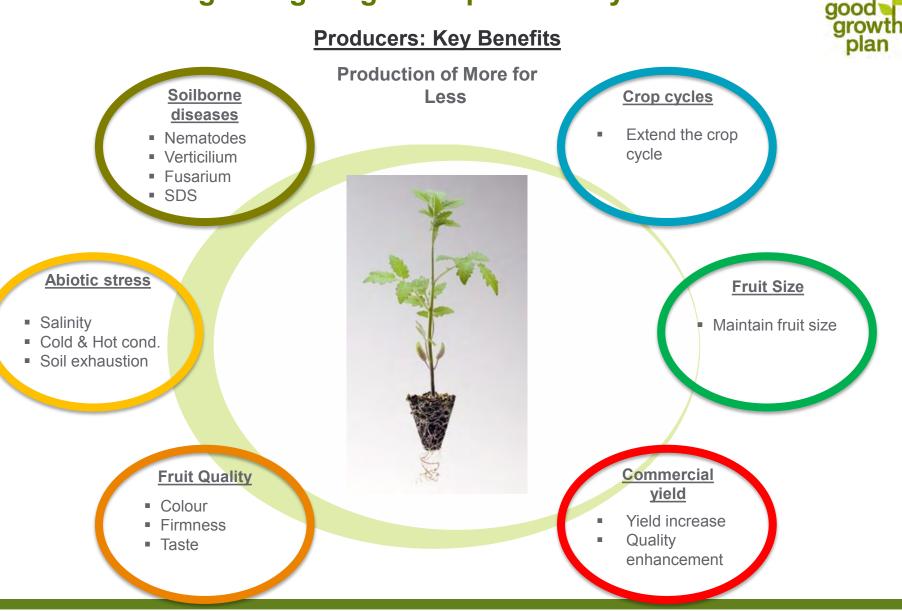


Grafting is a vital technology for the tomato industry





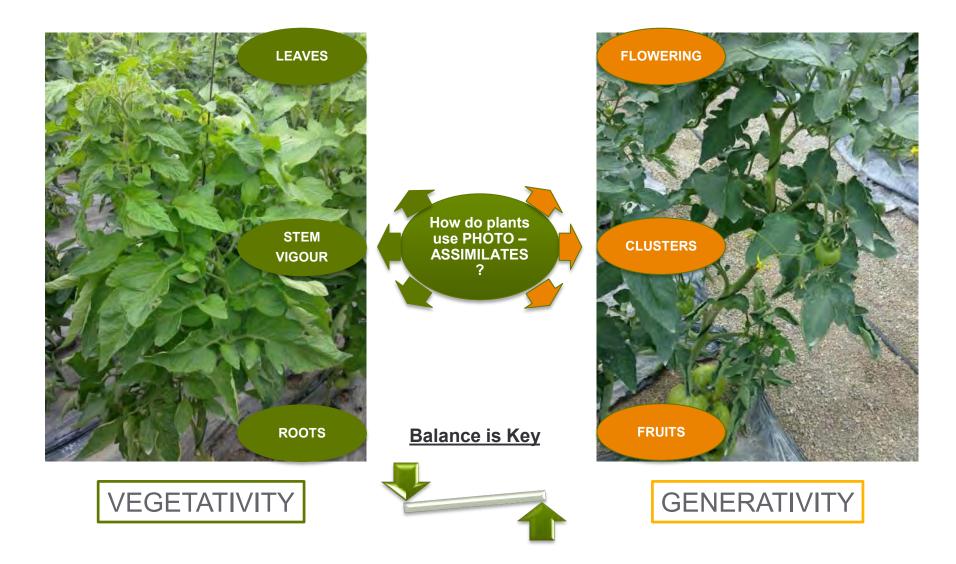
Influence of grafting on grower profitability





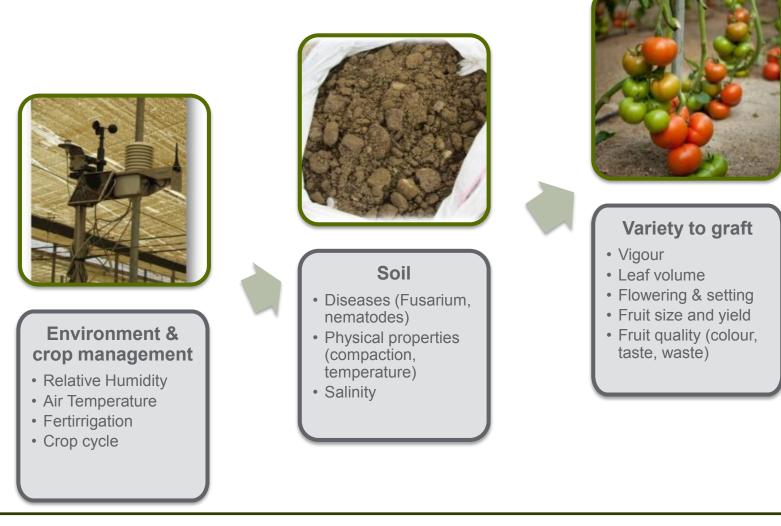
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Infuence of grafting on plant balance





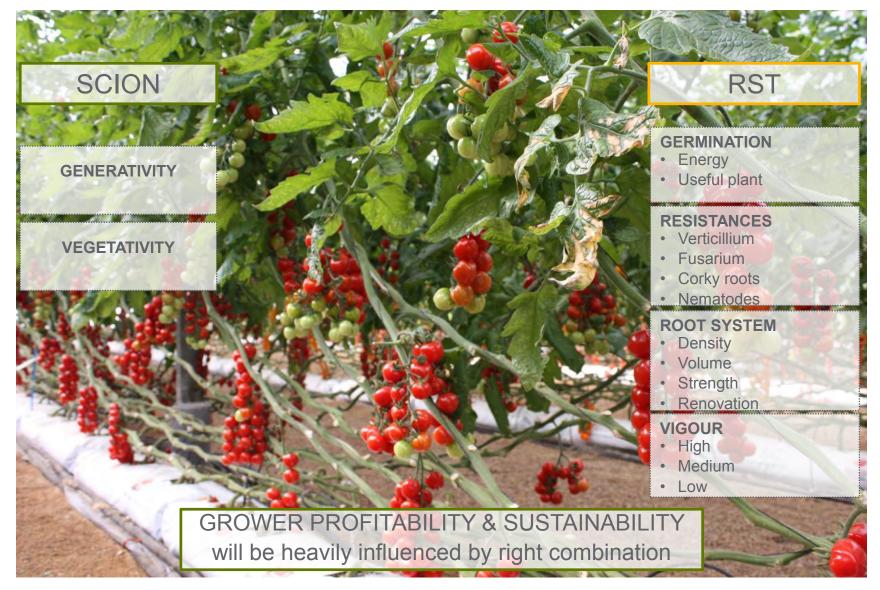
Influence of Rootstock on Crop performance



Ability to modify

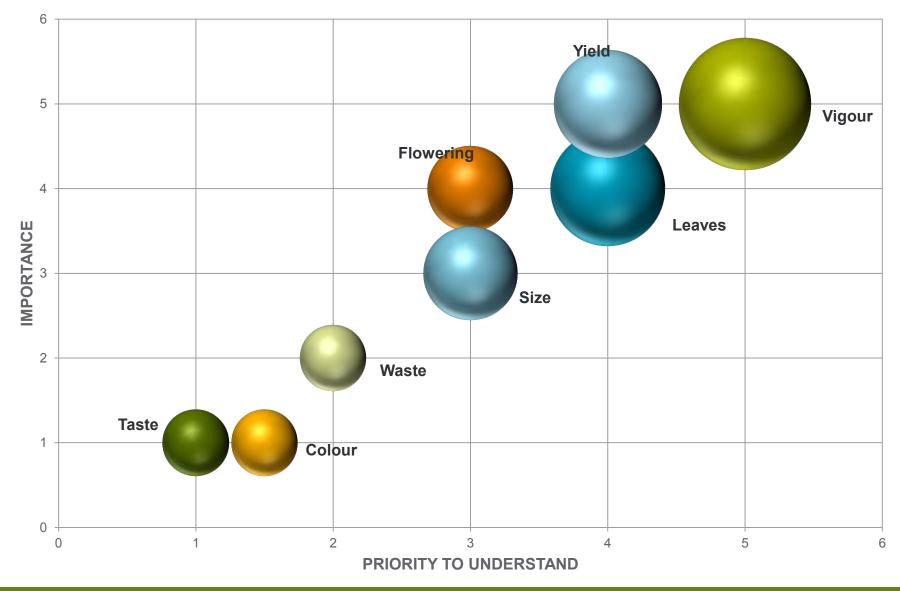


Scion & Rootstock interaction needs to be understood





Not all characteristics interact in the same way



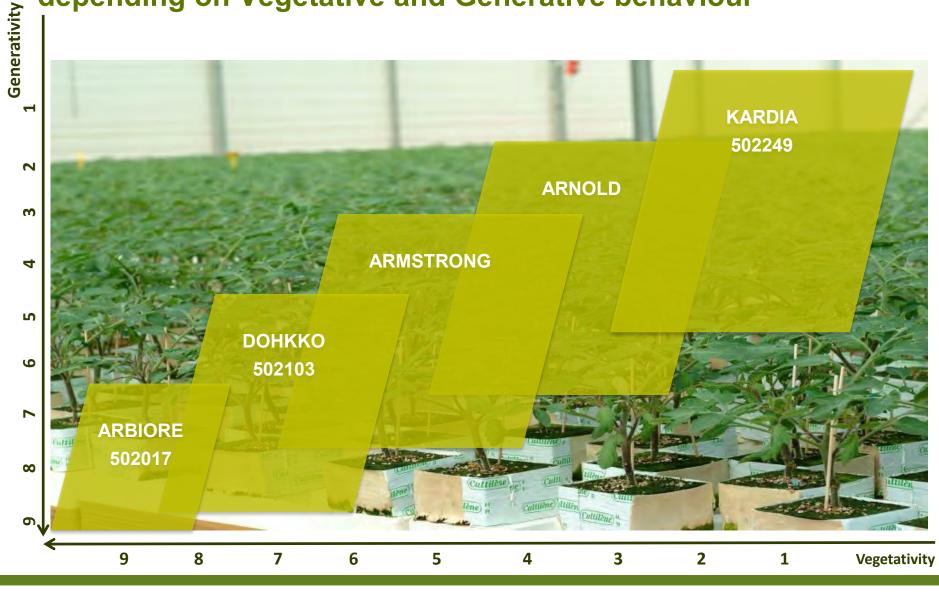


SYNGENTA STRATEGY



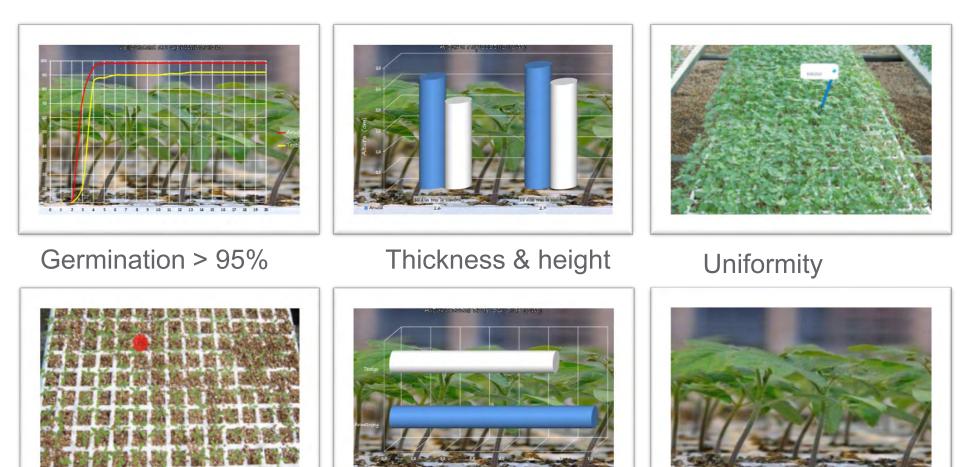


Our Rootstock portfolio. Matrix tool to classify RST and scion depending on Vegetative and Generative behaviour



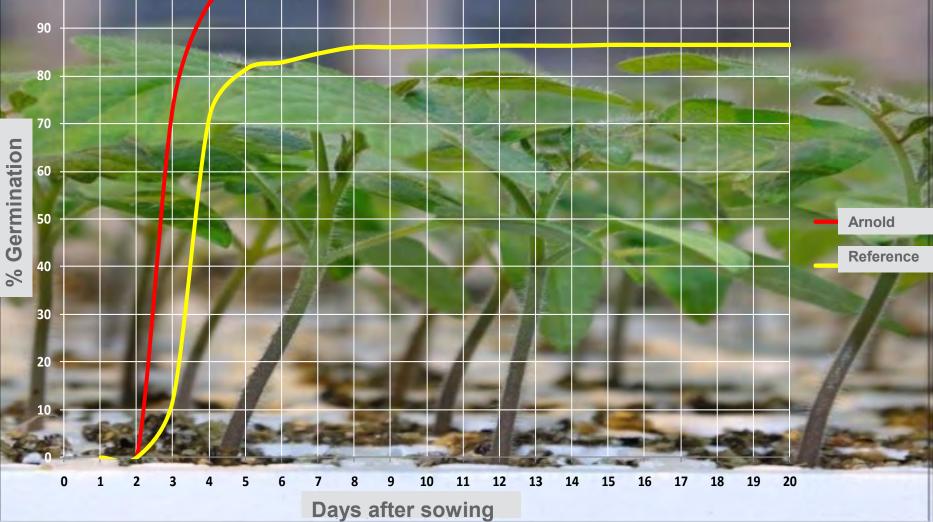


SYNGENTA Rootstocks improving YPR profitability



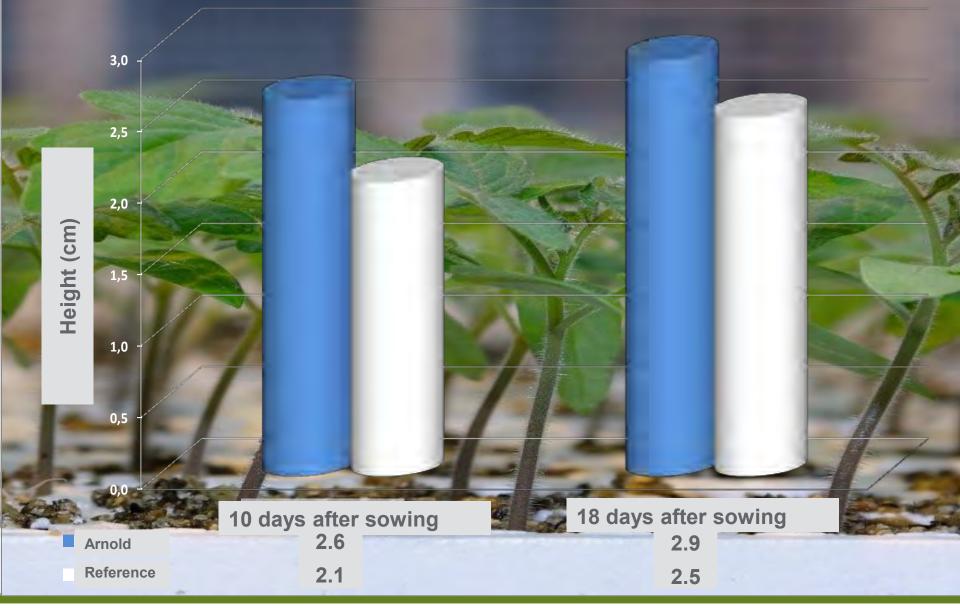


Speed of germination





Hypocotyl Height









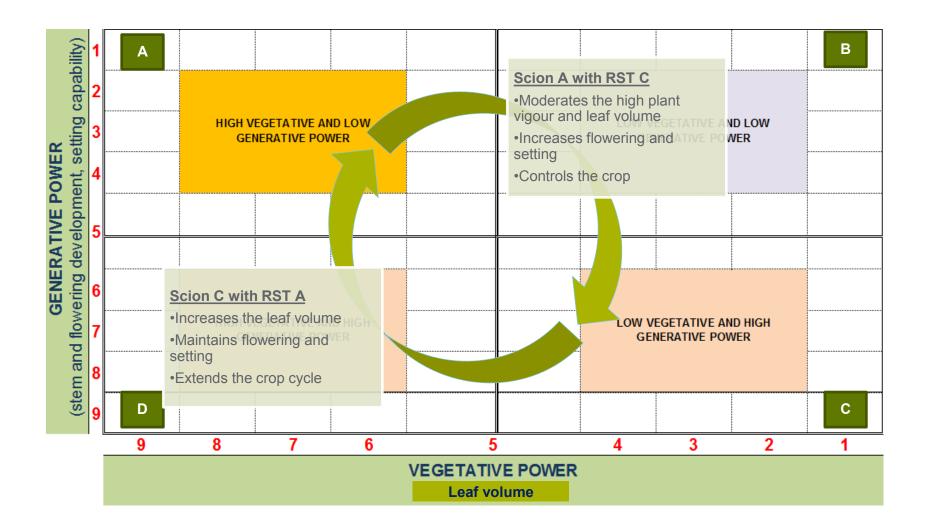








Varieties are classified according to plant behaviour. The matrix enables us to achieve the right combination.





At SYNGENTA we believe that Rootstocks represent a key strategic technology for the tomato industry.

We are working to provide the best solutions for YPRs and growers, with the aim of ensuring more sustainable agriculture.







GSPP Good Seed and Plant Practices

An international hygiene and management system in the chain of seed production and plant raising to protect tomato seed and plant lots from infection with *Cmm*

Presentation for Syngenta Almería, Spain, 28th January 2015 Claire Peusens

Content of the presentation



- What is GSPP?
- Why GSPP?
- GSPP vision and strategy 2015-2018
- Applying GSPP
- Some figures
- GSPP: organization
- Challenges of GSPP Standard & requirements
- GSPP's added value

What is GSPP?

Good Seed and Plant Practices (GSPP) is an international transparent business chain system.

The purpose of Good Seed and Plant Practices (GSPP) is to prevent tomato seed and plant lots from being infected by *Clavibacter michiganensis* subsp. michiganensis (Cmm)







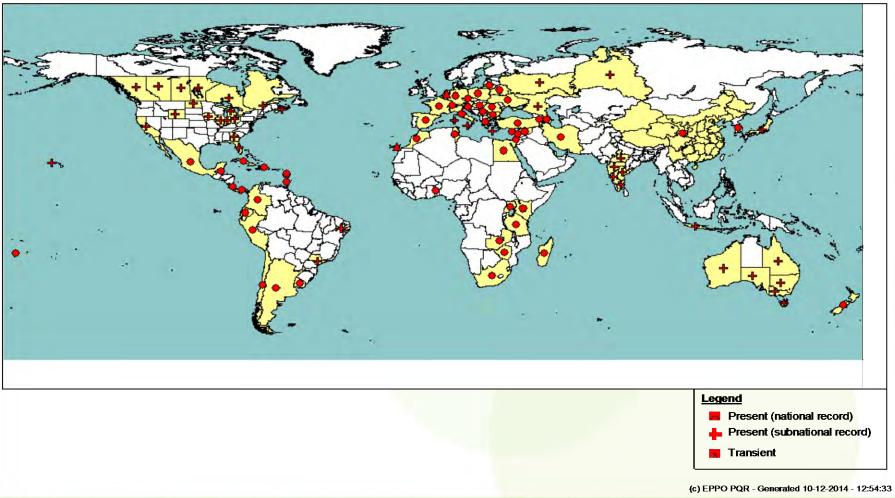
Distribution of Cmm





Clavibacter michiganensis subsp. michiganensis

EPPO Code : CORBM



Why GSPP?



- Increasing risks (due to more crop techniques for grafting and topping, growing scale of production).
- The (financial) consequences and damage caused by an outbreak are serious (destruction of a full production cycle, crop failure).
- Joint responsibility of seed companies, plant raisers and growers for managing and preventing the risk of *Cmm* (confidence in the chain, transparency).
- **Technical Investigation Procedure** (TIP): independent expert, finding the root cause of the problem and improving the system.
- Chain approach the whole propagation chain is involved. It is open to all partners.

GSPP vision 2015-2018



•*Cmm* is and will be seen as an industry problem; GSPP is the best solution for this and it requires preventive measures from all participants (also growers) in the chain.

•Increased number of GSPP accredited plant raisers; involvement of the chain.

•GSPP recognizes and takes stock of the differences between the participants.

•The GSPP Foundation is an international multi-disciplinary platform and network.

GSPP strategy 2015-2018



- Create an open system and foster the participation of all actors in the tomato production chain.
- Improve the *Cmm* reporting system; make the TIP Procedure more accessible to growers and non-GSPP plant raisers.
- Study the possibility of creating a starting programme for plant raisers.
- Increase the number of plant raisers.
- Develop a communication strategy to emphasize the importance of prevention of *Cmm* all the way along the chain.
- Spread information about *Cmm*: expertise centre for partners involved in GSPP.

Applying GSPP



Companies use the system for several reasons:

- •Risk reduction the costs of an *Cmm* outbreak are high.
- •Not only seeds pose a risk. There are other risks!
- •All parties in the chain have the responsibility to prevent the spread of *Cmm* contamination in facilities.
- •Grafting, topping and cutting create a high risk of spreading *Cmm*.

•The disease can be latent for a very long time and can appear quite unexpectedly.

Applying GSPP



- A path to the continuous improvement of business processes.
- This is a system that is developed and improved through the experiences of the companies themselves.
- Mutual commitment and knowledge development of all parties involved in the system.
- In the long term, the sector as a whole is upgraded.
- Technical Investigation Procedure.

GSPP: some figures



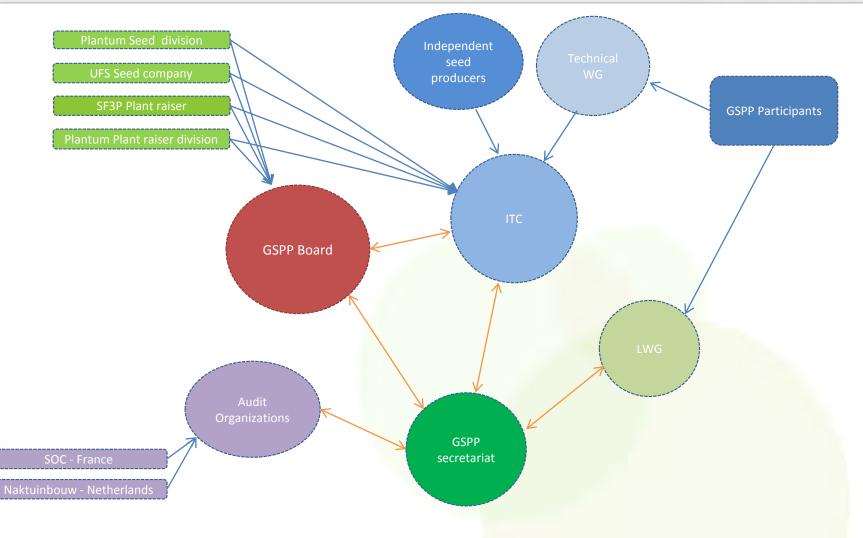
•34 companies are GSPP accredited.

•83 production sites (22-12-2014):

Europe	N. & S. America	Asia	Africa	Middle East
40	14	12	6	11

GSPP: organization





GSPP: scope



Besides the general parts of the GSPP Standard, a specific part refers to the **production of plants for fruit production**:

Technical requirements (water, disinfection, materials and equipment, facilities, plant production for growers, etc.) – annex 14.5

Technical Investigation Procedure – annex 14.6

GSPP Diagnostic protocol for *Cmm* in symptomatic tomato plants – annex 14.2





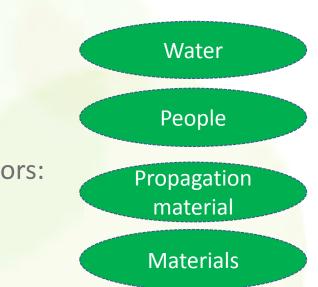
GSPP standard requirements consist of:

1. Quality Management system

2. Technical requirements

3. Risk analysis of the defined risks

4 main risk factors:





A continuous and systematic approach related to:

1. Quality Management system

•Clear organizational structure and supporting quality management system.

•Defined procedures (crop monitoring, crisis management, etc.) and working instructions.

•Staff qualifications and training.

•Systematic risk analysis in order to identify risks and associated control measures.

•Internal audits, corrective action procedures and management review.



2. Technical requirements

•Implement the requirements relating to the use of water.

•Implement the requirements relating to disinfection.

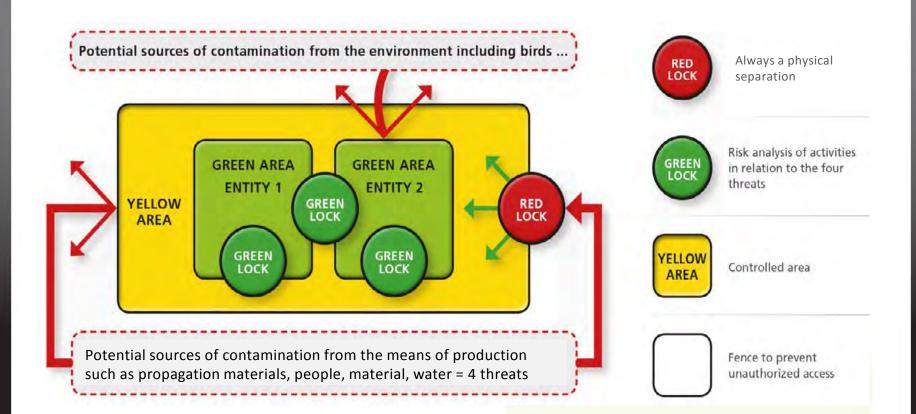
•Materials and equipment passing the red or green locks (logical routing of materials, clothing, etc.).

•Requirements concerning facilities as explained in the scheme.





The principle of a GSPP site:



Good seed and plant practices

3. Risk analysis of the defined risks

•Risk identification (four risks)

•Risk analysis and control measures

Some examples of control measures:
Hygiene sluices, disinfection of water, special clothing, disinfection of materials, adjusting internal transport routes.

Restricted access to visitors.



GSPP accreditation cycle



- The accreditation cycle of GSPP is 3 years.
- The initial audit is performed by 2 independent auditors.
- The 1st cycle has 2 periodical audits.
- In theory, the renewal audit is performed by 1 auditor.
- The 2nd cycle has 1 periodical audit.

GSPP: how to become accredited



- Fill in the application form and pay a deposit.
- The GSPP secretariat informs the audit organizations (AO).
- Naktuinbouw/SOC performs the initial audit.
- The AO sends the audit report to the applicant.
 - Non-conformities may require correction and re-audit.
 - Possibility of appeal if applicant disagrees.
- The AO sends the recommendation to the Board and the Board makes a decision and informs the applicant.
- Accreditation is published on Foundation website <u>www.gspp.eu</u>

GSPP's added value



- Multi-disciplinary information exchange and international cooperation in the chain.
- Effective *Cmm* risk management and prevention.
- Increased customer confidence.
- Responsibility taken in the chain.
- Transparent and open system.
- Technical Investigation Procedure.
- Up to date on new international developments.
- Continuous improvement of the GSPP system and processes within the company.



GSPP Good Seed and Plant Practices

Thank you for your attention!

GSPP Good Seed and Plant Practices E-mail: <u>info@gspp.eu</u> Website: <u>www.gspp.eu</u>

Syngenta rootstock event, Almería, 28 January 2015



Hygiene protocols at Centro Seia, a young plant raiser in Southern Europe

1

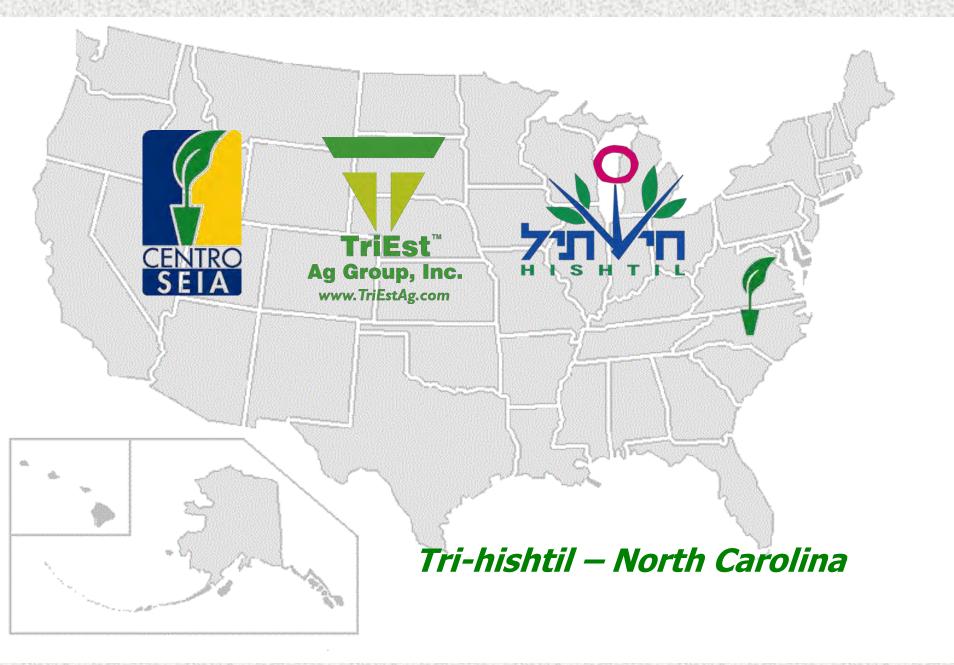
Giovanna Causarano, R&D Manager, Centro Seia Group

- 1. Introduction to Centro Seia group
- 2. Tomato grafting Cmm risk.
- 3. Centro Seia Cmm prevention year 2015.
- 4. What is going on in our market.
- 5. Next Cmm risk management steps.



Centro Seia – Sicily, Italy Vivaio del Lago – Marche, Italy Printemps du Lot – France Adria-Hishtil – Bosnia-Herzegovina

CENTRO SEIA

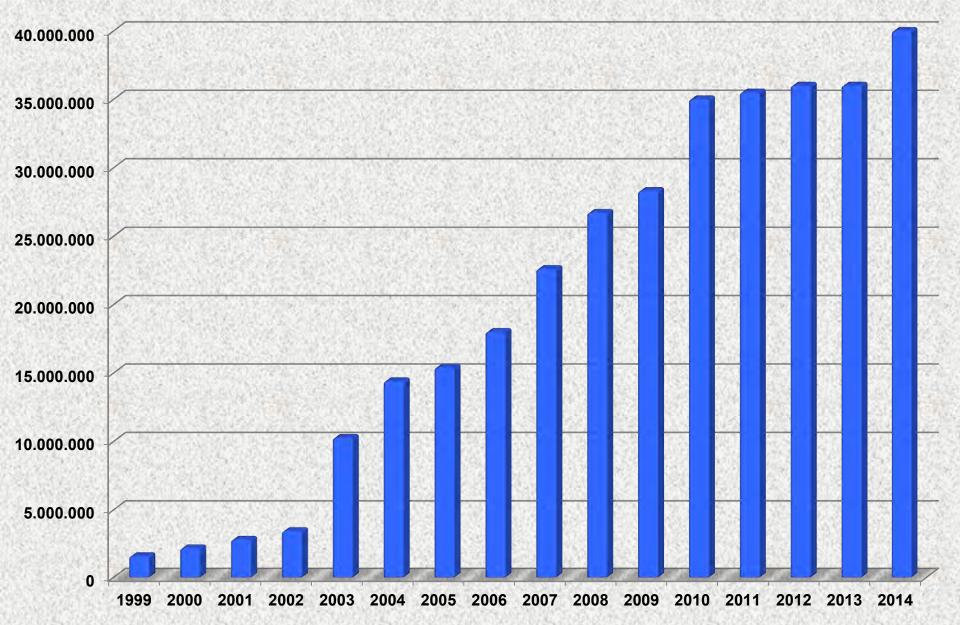




The Centro Seia group produces young vegetable plants for protected crops.

In 2014 the group produced **80 million** young plants, of which **40 million were** grafted.

Grafted plants Centro Seia, Adria, Vivaio del lago





Clavibacter michiganensis subsp michiganensis

It is well known and has been clearly demonstrated that:

seeds are the main long distance spread vector

•the use of **healthy seeds** is the first step towards controlling the disease

 the bacterium is able to infect plants through stomata and other natural openings (hydathodes), wounds (grafting) and roots

•infected tools (blades, ...) and operators (hands, ...) can carry and spread *Cmm* inoculum



The bacterium survives for a long time in **plant debris** (months), **soil** (months) and on **tools and structures** (weeks)



Nurseries may pose the highest risk from an epidemiological point of view

Collection of risks from several sources:

- 1. uncontrolled **introduction** of non certified/safe seeds in propagating areas;
- 2. repeated growing cycles in potentially infected areas;
- 3. continuous/repeated plant manipulation (grafted plants);
- 4. (sometimes) limited/low technical awareness of workers;
- 5. frequent and unregulated **access to growing areas** of technicians/workers/visitors;
- 6. frequent **internal transport** of seedlings and plants;
- 7. incomplete **efficacy of chemical** control methods.

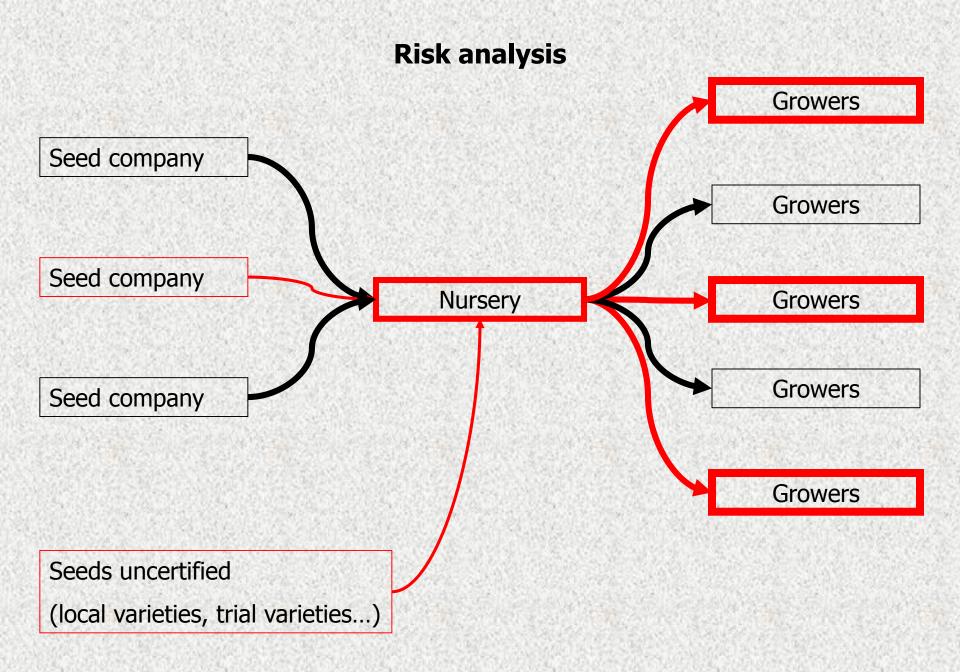




What we have done



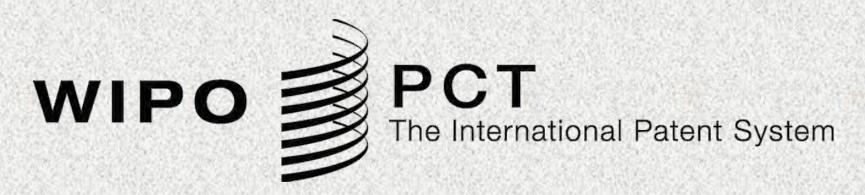








EPPO, the European and Mediterranean Plant Protection Organization, has declared that the Laser grafting technique is eliminating the risks of spreading *Cmm*.



WORLD INTELLECTUAL PROPERTY ORGANIZATION

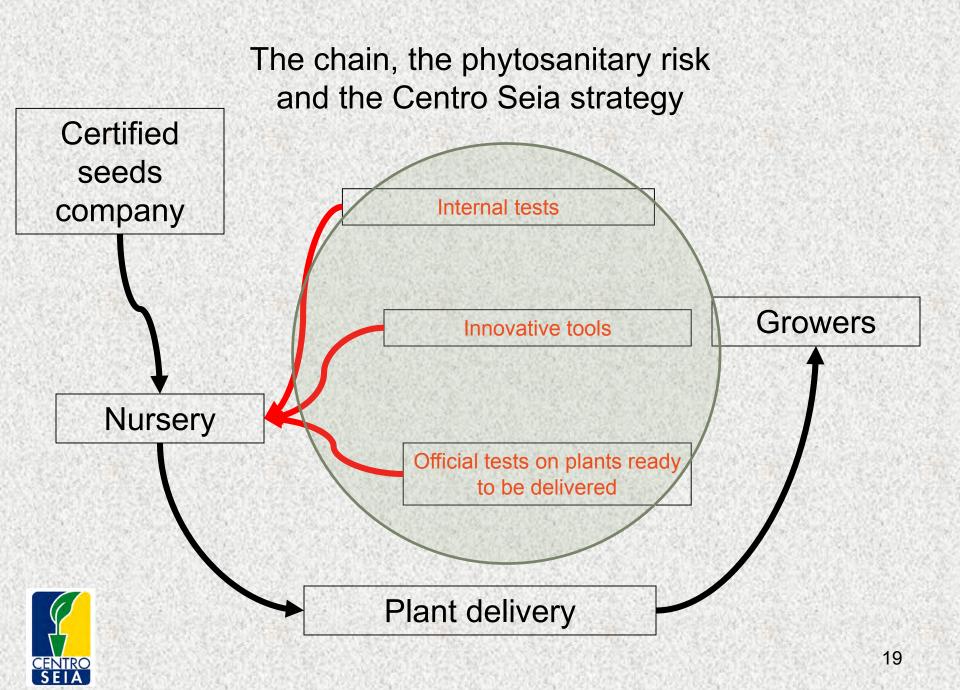
I Title of Invention A CUTTING TOOL AND A METHOD FOR PLANT GRAFTING

II Applicant

- II-1 This person is Applicant only
- II-2 Applicant for All designated States
- II-4 Name CENTRO SEIA S.R.L. SOCIETA' AGRICOLA
- III-1-1 This person is Inventor only
- III-1-3 Inventor for
- III-1-4 Name (LAST, First) MARCELLINO, Filippo



Specific **diagnostic** for phytopathological analysis during the grafting process developed together with Cersaa and Dr. **Andrea Minuto**





Trade mark: ELITE

Commessa IT MI.11.p13 Nr e titolo STP 005/207

CERTIFICATO DI CONFORMITA' N° 11/058P

"production of young tomato plants grafted by sterile cutting techniques"

What's going on in our market

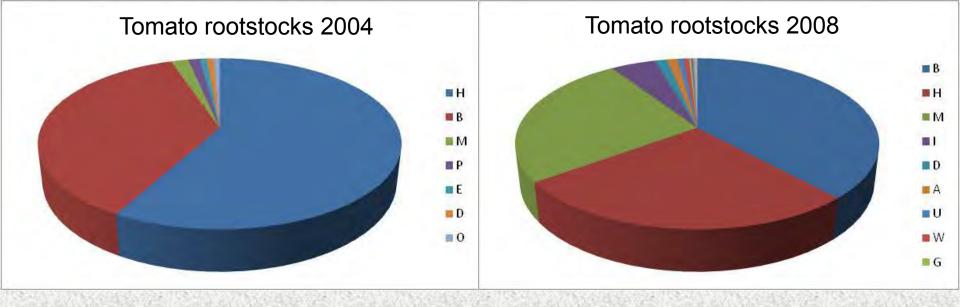




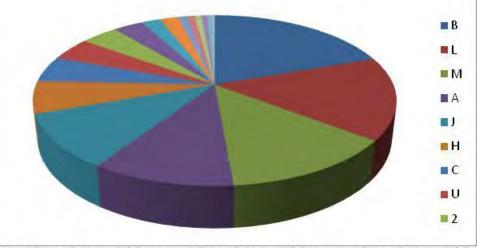
Tomato growing methods are evolving rapidly in Italy, with an increasing shift towards **soilless** cultivation.







Tomato rootstocks 2013



Increasing number of

rootstocks for young tomato

plants at Centro Seia.

What we are thinking of doing



Our aims and GSPP protocol

•To deliver healthy product, with a strong, shared **hygiene protocol** to be adapted to all young tomato plants

•In the case of Cmm, to understand **the origins** of the problem, and with the cooperation of the seed companies and the growers, to face the problem together (**TIP**)

•**To involve** all young plant raisers and to train growers in how to manage the problem



Next steps and GSPP protocol

•We have to understand how to manage tomato seeds which are not GSPP

•We have to see how the protocol can be adapted to different types of nurseries (Mediterranean type, old nurseries, etc.)

•If one of the players, be they a Seed company, a Young plant raiser or a grower, starts a court case, the TIP cannot begin. But we need to share responsibility and find solutions together.







Next steps and GSPP protocol

- We need to work together, in the case of court action as well
- Consideration must be given to how the protocol can be better adapted to young plant raisers' needs
- As part of the GSPP organization, the key players in the vegetable market can share ideas and raise the level of phytosanitary quality of tomato production, giving the production chain added value



Acknowledgments

Dr. Andrea Minuto

Centro di Saggio e Laboratorio Fitopatologico Centro di Sperimentazione e Assistenza Agricola Albenga (SV)

Thank you for your attention!

