

	Country Year	DR-CONGO 2016		ETHIOPIA 2016		GHANA 2016		KENYA 2015		MADAGASCAR 2016		MALAWI 2016		MOZAMBIQUE 2016		SENEGAL 2016		SOUTH AFRICA 2016		TANZANIA 2016		UGANDA 2015		ZAMBIA 2016		ZIMBABWE 2016		AVERAGE
Focus crop 1 (hectares)		Maize	1,506,884	Maize	2,114,876	Maize	1,019,000	Maize	2,116,141	Maize	215,113	Maize	1,676,213	Maize	1,703,500	Maize	146,361	Maize	2,688,200	Maize	4,146,000	Maize	1,105,000	Maize	1,205,202	Maize	2,283,803	1,686,638
Focus crop 2 (hectares)		Rice	405,074	Wheat	1,663,845	Rice	224,000	Sorghum	213,520	Rice	961,831	Beans	329,959	Rice	376,500	Rice	134,973	Soya bean	502,900	Beans	1,134,394	Sorghum	373,000	Rice	33,207	Beans	69,651	494,066
Focus crop 3 (hectares)		Beans	459,100	Teff	3,762,000	Soya bean	97,957	Beans	1,052,408	Beans	73,017	Groundnut	373,925	Cowpea	377,900	Groundnut	878,659	Sunflower	598,950	Soya bean	5,907	Beans	674,000	Groundnut	237,423	Soya bean	56,312	665,197
Focus crop 4 (hectares)		Soya bean	41,206	Sorghum	1,834,650	Cowpea	168,659	Cowpea	281,877	Groundnut	53,000	Soya bean	139,005	Soya bean	15,000	Millet	715,996	Wheat	476,570	Pigeon pea	250,509	Millet	175,000	Beans	88,673	Sorghum	588,945	371,468
Number of farming households (millions)					15.6		2.5		6.4		2.43		2.64		3.17		0.76		2.3		5.8		9.1		1.47		0.6	4
Population (millions)			78.7		102.4		28.2		44.0		24.9		28.8						55.9		55.6		41.5		16.6		16.2	40
Total land area (millions of hectares)			234.5		110.4		23.8		58.0		58.7		11.8		78.6		19.3		121.3		88.6		24.0		74.3		38.7	72
Arable land (% of size)			3%		15%		21%		5%		15%		40%		7%		17%		10%		15%		34%		5%		10%	15%
Ease of Doing Business rank - 2017 (out of 190)			184		159		108		92		167		133		137		147		74		132		115		98		161	131
A. RESEARCH AND DEVELOPMENT																												
1 Number of active breeders	Crop 1	Maize	9	Maize	23	Maize	10	Maize	34	Maize	2	Maize	4	Maize	6	Maize	2	Maize	27	Maize	28	Maize	5	Maize	17	Maize	17	14
	Crop 2	Rice	3	Wheat	20	Rice	5	Sorghum	7	Rice	21	Beans	3	Rice	8	Rice	4	Soya bean	7	Beans	7	Sorghum	5	Rice	5	Beans	5	8
	Crop 3	Beans	4	Teff	15	Soya bean	5	Beans	17	Beans	3	Groundnut	2	Cowpea	4	Groundnut	3	Sunflower	10	Soya bean	7	Beans	3	Groundnut	3	Soya bean	6	6
	Crop 4	Soya bean	2	Sorghum	16	Cowpea	6	Cowpea	5	Groundnut	3	Soya bean	2	Soya bean	2	Millet	3	Wheat	9	Pigeon pea	4	Millet	1	Beans	1	Sorghum	4	4
	Total		18		74		26		63		29		8		20		12		53		46		14		26		32	32
Adequacy of breeders (score out of 100)	Crop 1	Maize	60	Maize	75	Maize	81	Maize	68	Maize	66	Maize	71	Maize	90	Maize	17	Maize	84	Maize	63	Maize	51	Maize	64	Maize	84	67
	Crop 2	Rice	50	Wheat	-	Rice	70	Sorghum	48	Rice	69	Beans	46	Rice	90	Rice	50	Soya bean	88	Beans	54	Sorghum	39	Rice	80	Beans	83	64
	Crop 3	Beans	-	Teff	100	Soya bean	60	Beans	57	Beans	74	Groundnut	56	Cowpea	63	Groundnut	61	Sunflower	96	Soya bean	54	Beans	3	Groundnut	55	Soya bean	93	64
	Crop 4	Soya bean	-	Sorghum	10	Cowpea	80	Cowpea	58	Groundnut	73	Soya bean	54	Soya bean	68	Millet	25	Wheat	85	Pigeon pea	37	Millet	20	Beans	60	Sorghum	83	54
	Average satisfaction		55		70		72		54		70		58		77		38		88		57		28		66		86	63
2 Number of varieties released in last three years	Crop 1	Maize	6	Maize	12	Maize	17	Maize	61	Maize	0	Maize	17	Maize	5	Maize	0	Maize	236	Maize	44	Maize	19	Maize	37	Maize	34	38
	Crop 2	Rice	4	Wheat	15	Rice	0	Sorghum	3	Rice	13	Beans	0	Rice	3	Rice	0	Soya bean	71	Beans	2	Sorghum	0	Rice	3	Beans	7	9
	Crop 3	Beans	10	Teff	3	Soya bean	0	Beans	14	Beans	0	Groundnut	0	Cowpea	0	Groundnut	7	Sunflower	38	Soya bean	0	Beans	3	Groundnut	2	Soya bean	4	6
	Crop 4	Soya bean	0	Sorghum	7	Cowpea	0	Cowpea	2	Groundnut	0	Soya bean	0	Soya bean	0	Millet	0	Wheat	17	Pigeon pea	4	Millet	0	Beans	2	Sorghum	3	3
	Total		20		37		17		80		13		17		8		7		362		50		22		44		48	56
3 Availability of foundation seed (score out of 100)	Crop 1	Maize	65	Maize	58	Maize	70	Maize	62	Maize	51	Maize	65	Maize	42	Maize	77	Maize	80	Maize	72	Maize	64	Maize	76	Maize	84	67
	Crop 2	Rice	61	Wheat	54	Rice	62	Sorghum	77	Rice	62	Beans	49	Rice	85	Rice	74	Soya bean	49	Beans	61	Sorghum	50	Rice	68	Beans	76	64
	Crop 3	Beans	63	Teff	58	Soya bean	68	Beans	53	Beans	63	Groundnut	58	Cowpea	40	Groundnut	82	Sunflower	66	Soya bean	65	Beans	59	Groundnut	40	Soya bean	61	61
	Crop 4	Soya bean	62	Sorghum	60	Cowpea	68	Cowpea	52	Groundnut	52	Soya bean	46	Soya bean	46	Millet	79	Wheat	73	Pigeon pea	45	Millet	34	Beans	57	Sorghum	80	58
	Average satisfaction		64		57		67		68		60		56		54		78		67		67		52		76		79	65
4 Average age of varieties sold (years)	Crop 1	Maize	17.6	Maize	5.4	Maize	12.5	Maize	9.4	Maize	24.0	Maize	5.7	Maize	11.0	Maize	19.0	Maize	4.0	Maize	10.0	Maize	6.4	Maize	10.0	Maize	8.5	11
	Crop 2	Rice	16.5	Wheat	4.8	Rice	5.0	Sorghum	24.1	Rice	19.0	Beans	11.0	Rice	2.0	Rice	17.0	Soya bean	4.0	Beans	18.0	Sorghum	14.5	Rice	4.0	Beans	5.6	11
	Crop 3	Beans	22.0	Teff	6.7	Soya bean	8.5	Beans	14.7	Beans	18.0	Groundnut	18.0	Cowpea	21.0	Groundnut	20.0	Sunflower	5.0	Soya bean	10.0	Beans	9.9	Groundnut	29.0	Soya bean	8.2	15
	Crop 4	Soya bean	18.0	Sorghum	6.0	Cowpea	14.0	Cowpea	16.9	Groundnut	51.0	Soya bean	8.0	Soya bean	5.0	Millet	16.0	Wheat	7.0	Pigeon pea		Millet	22.7	Beans	12.0	Sorghum	12.0	16
	Total		41		23		18		57		3		57		11		3		Maize		44		Maize		88		Maize	59
5 Percentage of varieties with climate-smart features released in last 3 years (%)	Crop 1	Maize	75%	Maize	75%	Maize	?	Maize	51%	Maize	0%	Maize	88%	Maize	60%	Maize	63%	Maize	93%	Maize	14%	Maize	55%	Maize	51%	Maize	62%	57%
	Crop 2	Rice	25%	Wheat	27%	Rice	?	Sorghum	100%	Rice	29%	Beans	0%	Rice	67%	Rice	47%	Soya bean	70%	Beans	0%	Sorghum	0%	Rice	33%	Beans	43%	37%
	Crop 3	Beans	50%	Teff	25%	Soya bean	0%	Beans	36%	Beans	0%	Groundnut	0%	Cowpea	0%	Groundnut	44%	Sunflower	32%	Soya bean	0%	Beans	56%	Groundnut	50%	Soya bean	0%	23%
	Crop 4	Soya bean	0%	Sorghum	29%	Cowpea	0%	Cowpea	100%	Groundnut	0%	Soya bean	0%	Soya bean	0%	Millet	57%	Wheat	50%	Pigeon pea	50%	Millet	0%	Beans	50%	Sorghum	100%	34%
	B. INDUSTRY COMPETITIVENESS																											
6 Number of active seed companies (for focus crops only)	Crop 1	Maize	56	Maize	18	Maize	17	Maize	19	Maize	11	Maize	21	Maize	15	Maize	89	Maize	16	Maize	29	Maize	13	Maize	10	Maize	13	25
	Crop 2	Rice	36	Wheat	8	Rice	8	Sorghum	9	Rice	41	Beans	19	Rice	3	Rice	51	Soya bean	12	Beans	6	Sorghum	8	Rice	5	Beans	8	16
	Crop 3	Beans	28	Teff	9	Soya bean	5	Beans	12	Beans	20	Groundnut	14	Cowpea	11	Groundnut	109	Sunflower	9	Soya bean	2	Beans	13	Groundnut	4	Soya bean	6	19
	Crop 4	Soya bean	28	Sorghum	3	Cowpea	9	Cowpea	9	Groundnut	11	Soya bean	18	Soya bean	6	Millet	93	Wheat	4	Pigeon pea	1	Millet	2	Beans	4	Sorghum	7	15
	Total		63		21		17		22		48		22		35		138		41		30		13		10		16	37
7 Time taken to import/export seed from neighbouring countries (days)	Import seed (days)		16		100		90		38		14		21		-		-		18		12		6		11		32	
	Import score (out of 100)		20		40		20		50		74		83		74		-		66		63		71		55		44	
	Export seed (days)		-		-		-		14		-		20		-		-		12		-		9		12		35	
	Export score (out of 100)		-		-		-		69		-		63		-		-		61		-		65		60		27	
8 Total sales of certified seed (metric tons)	Crop 1	Maize	1,456	Maize	27,756	Maize	1,432	Maize	38,835	Maize	172	Maize	14,350	Maize	4,375	Maize	11,712	Maize	33,223	Maize	8,308	Maize	9,554	Maize	33,018	Maize	44,150	17,565
	Crop 2	Rice	430	Wheat	40,544	Rice	103	Sorghum	1,075	Rice	1,233	Beans	1,061	Rice	650	Rice	12,485	Soya bean	7,659	Beans	77	Sorghum	4,213	Rice	295	Beans	1,078	5,454
	Crop 3	Beans	331	Teff	2,654	Soya bean	43	Beans	1,322	Beans	193	Groundnut	1,561	Cowpea	364	Groundnut	75,286	Sunflower	2,444	Soya bean	4	Beans	1,143	Groundnut	621	Soya bean	2,750	6,824
	Crop 4	Soya bean	244	Sorghum	60	Cowpea	87	Cowpea	463	Groundnut	22	Soya bean	1,614	Soya bean	689	Millet	5,908	Wheat	14,515	Pigeon pea	26	Millet	26	Beans	719	Sorghum	1,300	2,137
	Market share concentration Herfindahl-Hirschman Index (out of 10,000)	Crop 1	Maize	828	Maize	1,904	Maize	1,620	Maize	5,438	Maize	2,272	Maize	3,539	Maize	2,623	Maize	274	Maize	3,079	Maize	1,973	Maize	1,317	Maize	1,952	Maize	3,380
Market share of top four companies (weighted by volume)	Crop 1	Rice	689	Wheat	3,009	Rice	2,287	Sorghum	4,576	Rice	783	Beans	2,574	Rice	?	Rice	375	Soya bean	1,226	Beans	2,589	Sorghum	2,483	Rice	4,898	Beans	2,370	2,322
	Crop 2	Beans	876	Teff	3,898	Soya bean	3,072	Beans	2																			



	Country Year	DR-CONGO 2016	ETHIOPIA 2016	GHANA 2016	KENYA 2015	MADAGASCAR 2016	MALAWI 2016	MOZAMBIQUE 2016	SENEGAL 2016	SOUTH AFRICA 2016	TANZANIA 2016	UGANDA 2015	ZAMBIA 2016	ZIMBABWE 2016	AVERAGE	
C. SEED POLICY AND REGULATION																
10 Length of variety release process	Time (months)	26	46	42	33	43	34	24	36	20	31	20	24	18	31	
	Satisfaction with variety release (out of 100)	62	71	43	47	54	58	53	74	83	70	60	84	83	65	
11 Status of seed policy frameworks*	Seed Policy (year)	2006 (draft)	1993	2013	2010	no policy	1993 (2014)	no policy	no policy	2012	Agric policy	2014 (draft)	1999	no policy	2005	
	Latest amendment to Seed Law (year)	2007 (draft)	2013	2010	2012	1995	1996 (2013)	no law	1994	2015	2014	2006	1995	1971	2003	
	Latest Seed Regulations (year)	2007 (draft)	2016	2015	2016	2010	1997	2013	1997	2015	2007	2015	2015	2016	2011	
	Regional harmonization	parliament appr. Pending (COMESA)	Amendments on-going (COMESA)	Amendments on-going (ECOWAS)	harmonized (COMESA)	Amendments on-going (COMESA)	Amendments on-going (COMESA)	harmonized (SADC)	harmonized (ECOWAS)	Not yet harmonized (SADC)	Amendments on-going (SADC)	harmonized (COMESA)	regulations appr. Pending (COMESA)	harmonized (COMESA)		
	Seed plan/strategy (year)	no seed plan	2013	2015	no seed plan	2008	no seed plan	2015	no seed plan	2015	no seed plan	no seed plan	no seed plan	no seed plan	no seed plan	2,013
12 Quality of seed law/regulations	Score (out of 100)	58	65	78	63	65	54	69	75	79	70	55	77	86	69	
	Quality of enforcement systems	51	57	56	61	47	46	64	74	69	70	42	68	77	60	
13 Adequacy of seed inspectors	# Public inspectors	105	32	32	64	60	37	25	21	400	48	6	35	14	68	
	# Private inspectors	0	0	0	12	0	0	0	0	180	0	0	83	46	25	
	# Total inspectors	105	32	32	76	60	37	25	21	580	48	6	118	60	92	
	Score (out of 100)	33	68	49	62	63	49	59	22	79	59	40	67	84	56	
14 Efforts to stamp out fake seed	Reported cases in 1 year	185	11	7	6	34	20	11	39	6	18		22	52	34	
	Score (out of 100)	22	57	32	50	37	38	52	52	50	57	37	57	56	46	
15 Use of smart subsidies[3]	% of seed sold as subsidy	0%	0%	0%	0%	0%	70%	16%		0%	46%	0%	38%	7%	15%	
	Govt. expenditure on seed subsidy (\$ mill)	0	0	0	0	0	13	1		0	3	0	23	28	6	
	% of price subsidy	0%	0%	0%	0%	100%		70%		0%	30%	0%	30%	0%	21%	
	Years of subsidy (years up to 2016)	-	-	-	-	-	11	18		0	11	0	14	6	9	
	Method of subsidy distribution	-	-	-	-	-	public	private (voucher)	private (voucher)	-	80% private (voucher)	-	private (e-voucher)	public (govt. warehouses)	-	
D. INSTITUTIONAL SUPPORT																
16 Availability of extension services	Households per extension officer	Relief prog.	5,898	592	1,500	910	26,000	1,388	1,045		1,059	831	4,019	560	127	3,661
	Score (out of 100)	54	55	52	40	47	56	22	46	56	55	55	72	50		
17 Quality of national seed traders' association (Score out of 100)	Activity on important seed sector issues	37	66	46	63	38	78	55	73	81	73	52	69	71	62	
	Effectiveness in advocacy	32	53	44	57	41	75	52	66	82	75	53	64	64	58	
	Managerial ability	32	63	43	60	44	69	53	59	86	71	44	65	63	58	
	Providing value to members	30	71	38	62	39	74	54	59	84	69	51	65	50	57	
	Democracy in the elections and decision making	35	69	64	73	40	84	77	60	87	74	68	85	49	67	
	Ability to mobilize resources	23	65	36	57	39	63	51	58	82	68	43	58	51	53	
	Overall score (out of 100)	32	66	46	62	45	73	59	62	81	71	51	69	50	59	
E. SERVICE TO SMALLHOLDER FARMERS																
18 Concentration of rural-agro dealers	Number of agro-dealers	161	650	3,153	5,240	143	2,000	211	97		2,000	1,167	450	1,278	1,379	
	Agricultural households per agro-dealer	43,882	27,841	794	1,221	17,300	1,320	15,000	7,788		2,900		3,276	438	11,069	
	Score (out of 100)	30	47	64	64	64	64	25	61	66	57	75	55			
19 Availability of seed in small packages (% of seed sold in packages of 2kgs or less)	% volume sold (weighted)	31%	0%	66%	79%	32%	29%	64%	0%	<5%	93%	27%	19%	6%	37%	
	Crop 1	Maize 28%	Maize 0%	Maize 74%	Maize 73%	Maize 27%	Maize 17%	Maize 66%	Maize 0%	Maize <5%	Maize 93%	Maize 32%	Maize 20%	Maize 7%	36%	
	Crop 2	Rice 26%	Wheat 0%	Rice 29%	Sorghum 96%	Rice 35%	Beans 79%	Rice 60%	Rice 0%	Soya bean 0%	Beans 92%	Sorghum 20%	Rice 0%	Beans 7%	34%	
	Crop 3	Beans 31%	Teff 1%	Soya bean 14%	Beans 93%	Beans 28%	Groundnut 87%	Cowpea 88%	Groundnut 0%	Sunflower <1%	Soya bean 34%	Beans 3%	Groundnut 0%	Soya bean 1%	32%	
	Crop 4	Soya bean 55%	Sorghum 0%	Cowpea 42%	Cowpea 100%	Groundnut 28%	Soya bean 42%	Soya bean 21%	Millet 0%	Wheat 0%	Pigeon pea 30%	Millet 75%	Beans 4%	Sorghum 4%	31%	
	Score (out of 100)	57	60	72	50	78	73	73	50	86	72	75	67			
20 Seed price divided by grain price (at planting time)	Maize (seed price divided by grain price)	OPV 5.0	OPV 3.6	OPV 4.3	OPV 3.7	OPV 2.4	OPV 4.1	OPV 3.8	OPV 2.9	OPV 5.0	OPV 5.2	OPV 3.0	OPV 10.0	OPV 3.6	4.4	
	Maize (seed price divided by grain price)	Hybrid 5.5	Hybrid 7.1	Hybrid 6.0	Hybrid 4.5	Hybrid n/a	Hybrid 4.2	Hybrid 4.8	Hybrid n/a	Hybrid 34.4	Hybrid 8.7	Hybrid 6.0	Hybrid 13.4	Hybrid 9.3	9.4	
	Crop 2 (seed price divided by grain price)	Rice 1.8	Wheat 1.9	Rice 1.7	Sorghum 3.0	Rice 2.3	Beans 1.5	Rice 3.3	Rice 1.7	Soya bean 4.9	Beans 1.4	Sorghum 2.3	Rice 1.4	Beans 2.1	2.3	
	Crop 3 (seed price divided by grain price)	Beans 1.4	Teff 1.4	Soya bean 4.4	Beans 1.8	Beans 2.2	Groundnut 1.9	Cowpea 1.5	Groundnut 1.1	Sunflower 22.9	Soya bean 2.0	Beans 1.6	G' nut OPV 1.3	Soya bean 2.6	3.7	
	Crop 4 (seed price divided by grain price)	Soya bean 1.6	Sorghum 2.2	Cowpea 2.0	Cowpea 1.5	Groundnut 1.5	Soya bean 1.8	Soya bean 1.6	Millet 3.0	Wheat 3.0	Pigeon pea 3.0	Millet 1.7	Beans 2.3	Sorghum OPV 6.9	2.5	
Seed price (USD per kg)	Maize (seed price in USD per kg)	OPV 1.6	OPV 0.6	OPV 1.5	OPV 1.7	OPV 0.6	OPV 1.2	OPV 1.9	OPV 0.9	OPV 1.2	OPV 1.3	OPV 1.0	OPV 1.5	OPV 1.4	1.3	
	Maize (seed price in USD per kg)	Hybrid 3.1	Hybrid 1.3	Hybrid 2.2	Hybrid 1.8	Hybrid n/a	Hybrid 1.3	Hybrid 2.4	Hybrid n/a	Hybrid 8.0	Hybrid 2.2	Hybrid 2.0	Hybrid 2.6	Hybrid 2.8	2.7	
	Crop 2 (seed price in USD per kg)	Rice 2.0	Wheat 0.7	Rice 1.0	Sorghum 1.5	Rice 0.6	Beans 1.5	Rice 0.8	Rice 0.8	Soya bean 2.4	Beans 1.1	Sorghum 0.8	Rice 1.8	Beans 2.8	1.4	
	Crop 3 (seed price in USD per kg)	Beans 2.3	Teff 1.1	Soya bean 1.8	Beans 1.8	Beans 1.3	Groundnut 1.5	Cowpea 1.7	Groundnut 0.6	Sunflower 11.1	Soya bean 1.3	Beans 1.7	G' nut OPV 2.8	Soya bean 1.6	2.3	
	Crop 4 (seed price in USD per kg)	Soya bean 2.6	Sorghum 0.7	Cowpea 2.1	Cowpea 1.5	Groundnut 1.3	Soya bean 1.1	Soya bean 1.4	Millet 0.9	Wheat 1.2	Pigeon pea 0.4	Millet 0.8	Beans 2.6	Sorghum OPV 1.6	1.4	

COLOR CODES: Extremely poor (0-19.99) Poor (20-39.99) Fair (40-59.99) Good (60-79.99) Excellent (80-100)

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