



TASAI

THE AFRICAN SEED ACCESS INDEX

STAK Annual Congress 2017

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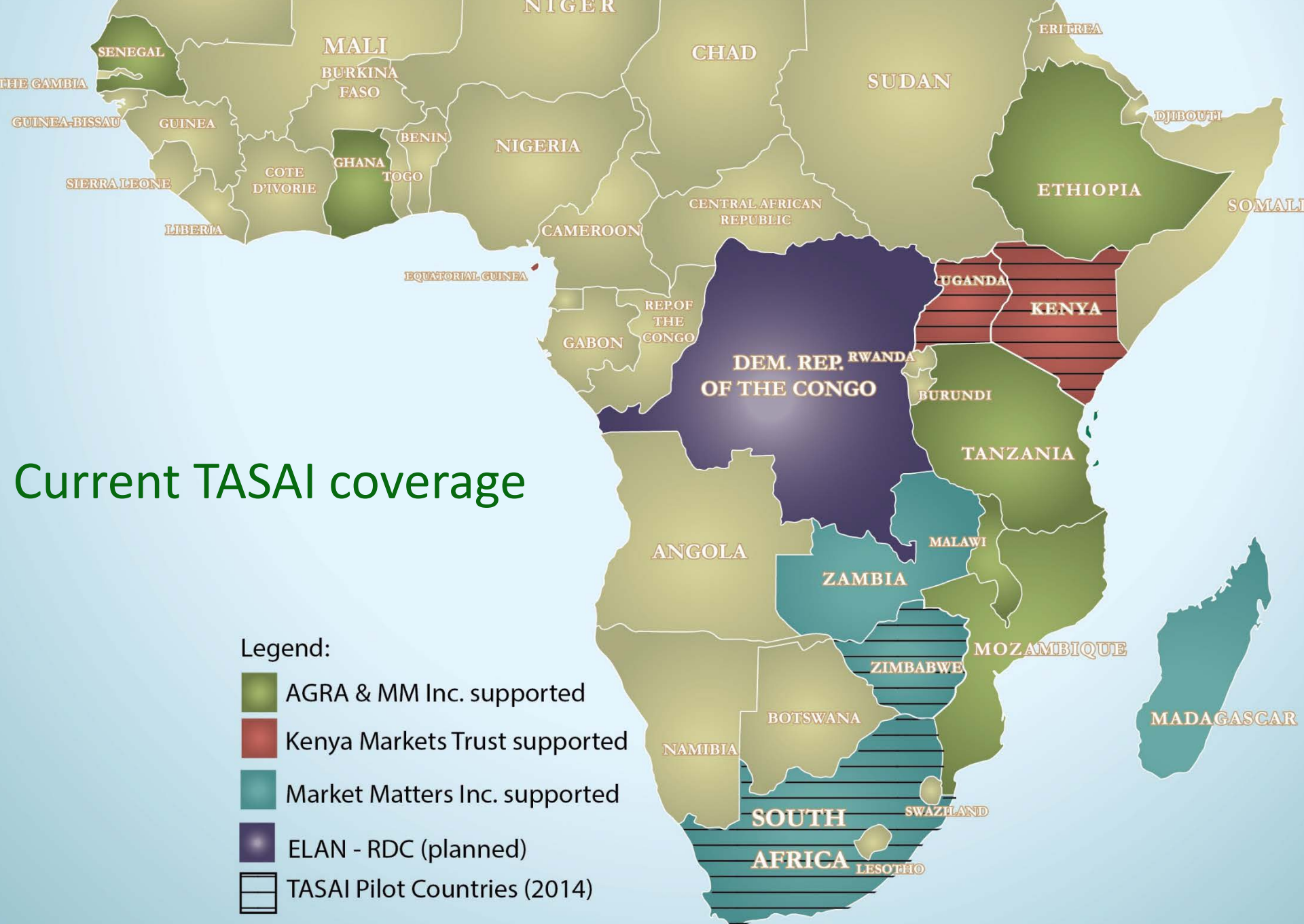
Nairobi, Kenya, 23rd November 2017



The African Seed Access Index (TASAI)

Objective: TASAI seeks to promote the creation and maintenance of enabling environments for competitive seed systems serving African farmers. It is this enabling environment that TASAI seeks to measure, track, and compare across African countries.





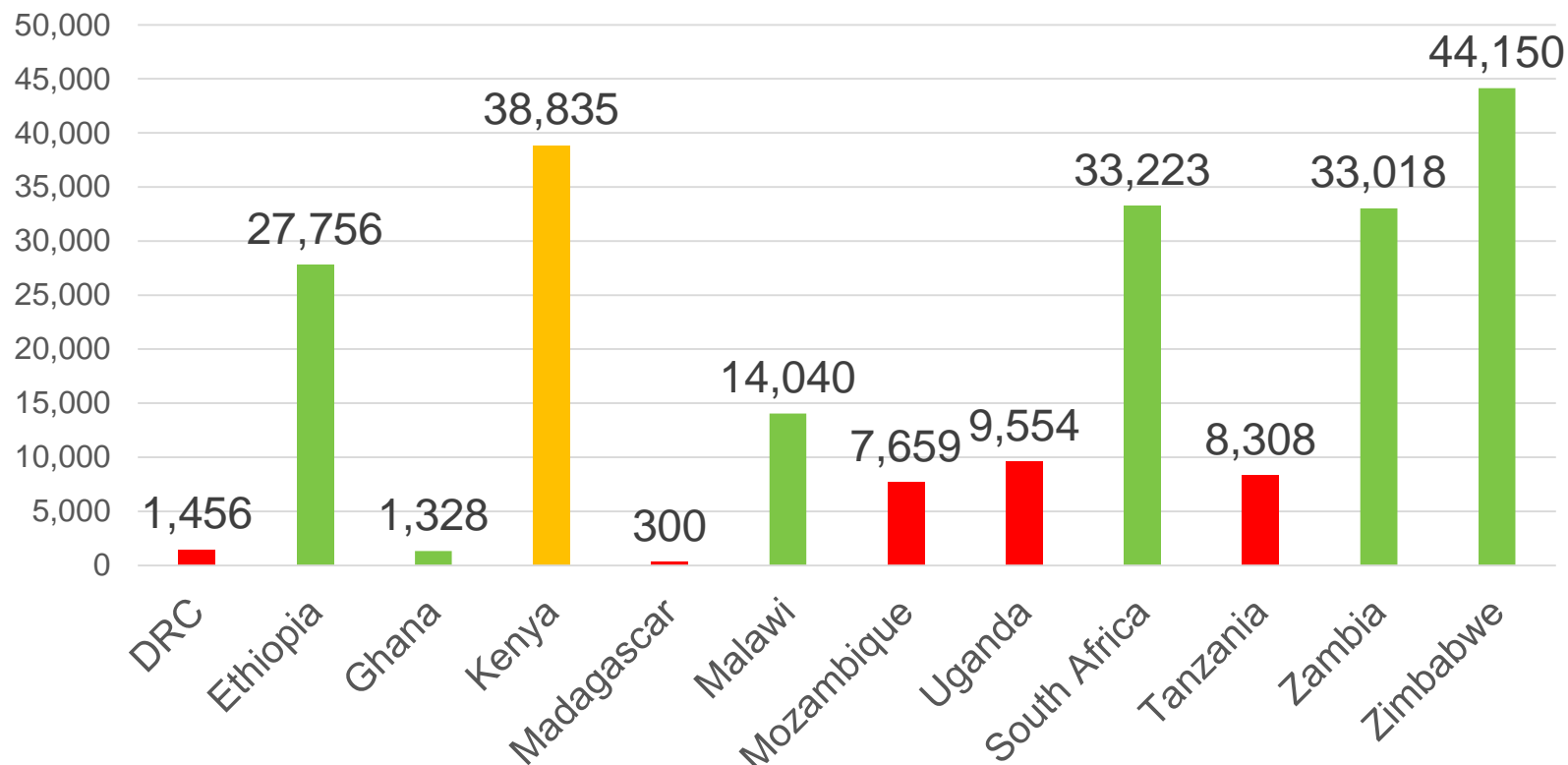
METHODS

- In-depth country studies
- Two country researchers
- Four top grain and legume food crops
- Industry opinions and performance are graded as follows:

Score	Interpretation
80 to 100	Excellent
60 to 79.99	Good
40 to 59.99	Fair
20 to 39.99	Poor
0 to 19.99	Extremely poor



Sale of Certified Maize Seed (Mt) in 2016



Potential growth countries:

- **DRC, Uganda, Tanzania** – low seed volumes
- **Ethiopia**: only 1 foreign company in cereals/legumes



4. Average age (years) of varieties sold

	DRC		Ethiopia		Tanzania		Uganda	
	Crop	Age	Crop	Age	Crop	Age	Crop	Age
Crop 1	Maize	18	Maize	5	Maize	10	Maize	6
Crop 2	Rice	17	Wheat	5	Beans	18	Sorghum	15
Crop 3	Beans	22	Teff	7	S'bean	10	Beans	10
Crop 4	S'beans	18	Sorg'm	6	P'pea	-	Millet	23

Potential to introduce new varieties esp. in DRC, Tz, Ug



7. Time it takes to import seed from neighboring countries

Average number of days for seed import				
	DRC	Ethiopia	Tanzania	Uganda
Import seed	16	100	12	9

Industry opinion: Satisfaction with seed import process				
Avg. Score	20	40	63	71
Interpretation	Poor	Fair	Fair	Good

Ethiopia: Only 2 seed importers. Process is very long and bureaucratic
 Uganda and Tanzania: Fairly efficient and clear import procedures



10. Variety release process

Variety release process (time and cost)				
	DRC	Ethiopia	Tanzania	Uganda
Ave time (months)	26	46	31	20
Average cost (USD)	4,692	-	540	-

Industry opinion: Satisfaction with variety release process				
Score (%)		71	70	60
Interpretation		Good	Good	Good

Improvement in Tanzania: only regulates one season (VCU), so can be only 12 months if breeder is well-prepared & paper-work in order



11. Status of seed policy framework

Status of seed policy framework				
	DRC	Ethiopia	Tanzania	Uganda
Seed Policy (year)	2006	1993	Under Agric policy	2014 (draft)
Seed Law (amended)	2007 (draft)	2013	2014	2006
Seed Regulations	2007 (draft)	2016	2007	2015
COMESA Seed Harmonization	Amendments on-going	Amendments on-going	na	Harmonized

Industry opinion: Enforcement of Seed Regulations				
Score (out of 100)	51	57	70	42
Interpretation	Fair	Fair	Good	Fair



14. Efforts to stamp out fake seed

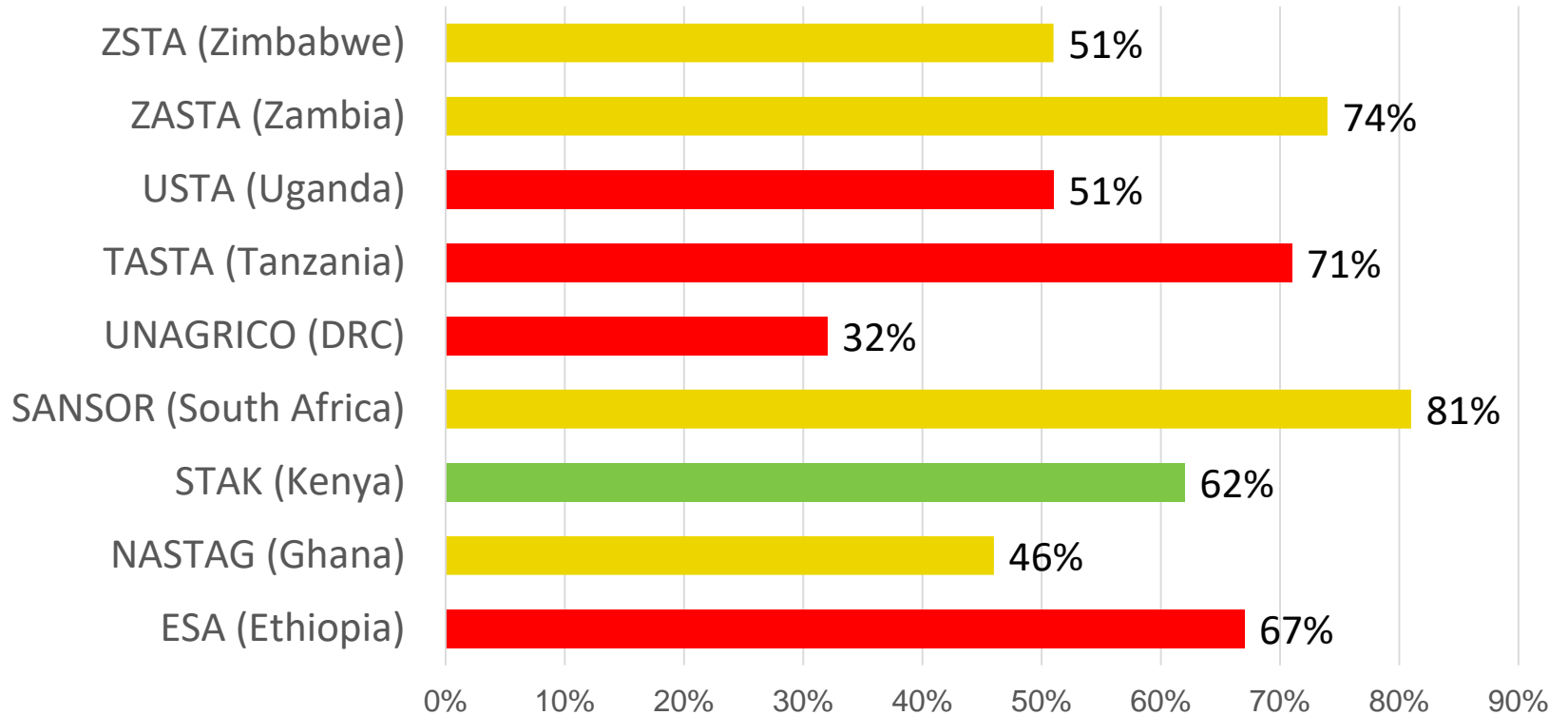
Number of fake seed cases reported to companies				
	DRC	Ethiopia	Tanzania	Uganda
# of cases	185	11	18	No records

Industry opinion: Satisfaction with govt efforts to stamp out fake seed				
	DRC	Ethiopia	Tanzania	Uganda
Score (%)	22	57	57	37
Interpretation	Poor	Fair	Fair	Poor

- DRC: Main source of fake seed - Relief market in east DRC
- A lot (local and imported) grain, sold as seed



17. Seed Traders' Association (out of 100%)



- TASTA (Tanzania) very active in advocacy & representation
- UNAGRICO (DRC) very weak. DRC has provincial associations but are also weak



18. Concentration of agro-dealers

Number of agro-dealers				
	DRC	Ethiopia	Tanzania	Uganda
# of agro-dealers	161	650	2,000	1,167

Industry opinion: Satisfaction with agro-dealer network				
Score (%)	30	47	66	
Interpretation	Poor	Fair	Good	

- DRC: Not a common concept
- Ethiopia: currently being strengthened, partly through co-operatives



Conclusion – priority investment countries

Country	Priority level	Supporting Notes
DRC	Medium	<ul style="list-style-type: none">• Growth market• Greater proximity to the east (Kivus)• But, weak enforcement of laws & market inefficiencies (relief market)
Ethiopia	Medium	<ul style="list-style-type: none">• Growth market• Proximity• High level of govt involvement
Tanzania	High	<ul style="list-style-type: none">• Growth market• Proximity
Uganda	High	<ul style="list-style-type: none">• Growth market• Proximity to Kenya• Efficient import process





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