



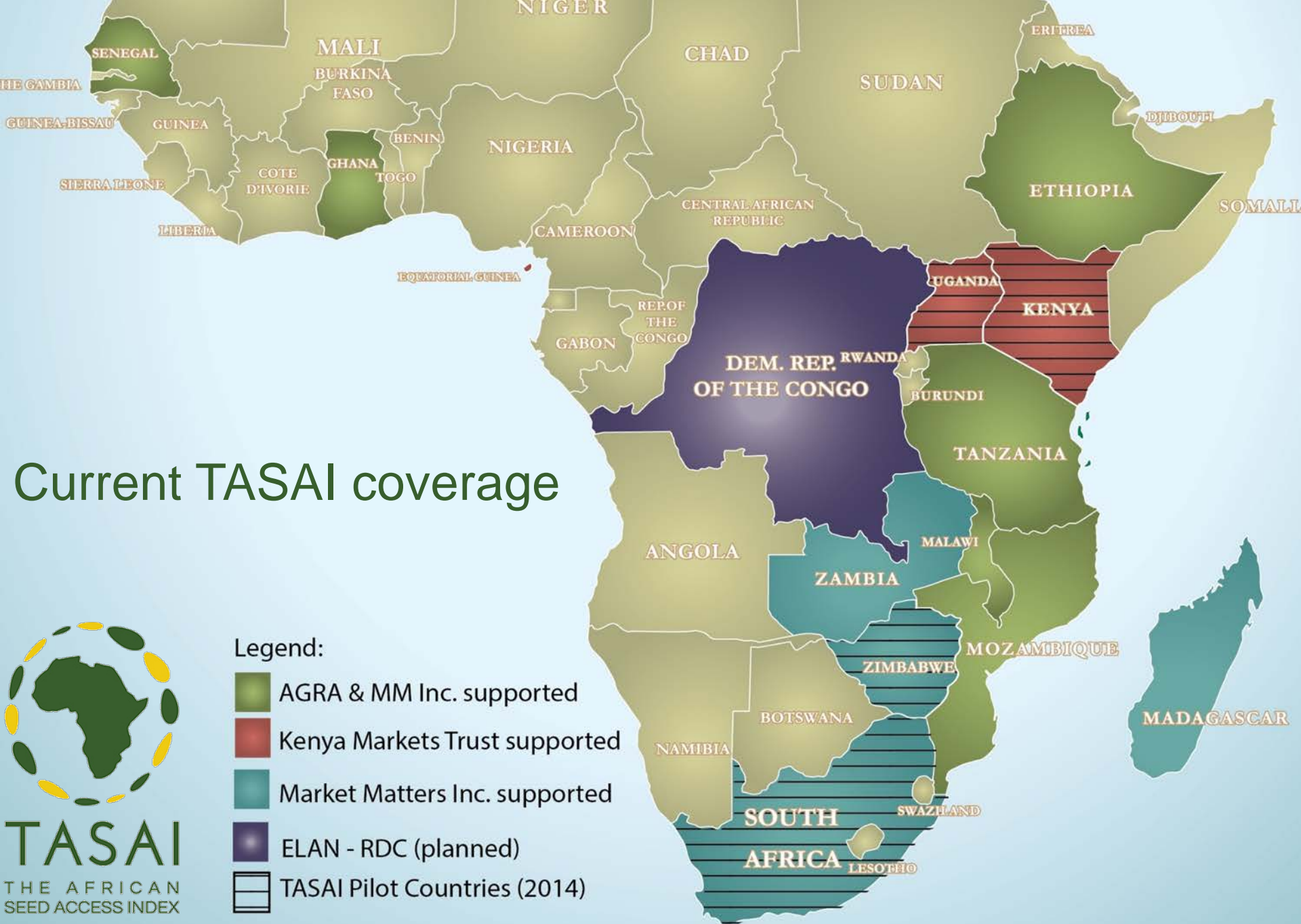
TASAI

THE AFRICAN SEED ACCESS INDEX

AGRF2017

Ed Mabaya





SENEGAL

MALI

NIGER

CHAD

ERITREA

SUDAN

THE GAMBIA

BURKINA FASO

DJIBOUTI

GUINEA-BISSAU

GUINEA

BENIN

NIGERIA

SOMALI

SIERRA LEONE

COTE D'IVOIRE

GHANA

TOGO

ETHIOPIA

LIBERIA

CAMEROON

CENTRAL AFRICAN REPUBLIC

EQUATORIAL GUINEA

GABON

REP. OF THE CONGO

UGANDA

KENYA

DEM. REP. RWANDA OF THE CONGO

BURUNDI

TANZANIA

ANGOLA

MALAWI

ZAMBIA

MOZAMBIQUE

MADAGASCAR

Legend:

- AGRA & MM Inc. supported
- Kenya Markets Trust supported
- Market Matters Inc. supported
- ELAN - RDC (planned)
- TASAI Pilot Countries (2014)



TASAI
THE AFRICAN SEED ACCESS INDEX

NAMIBIA

BOTSWANA

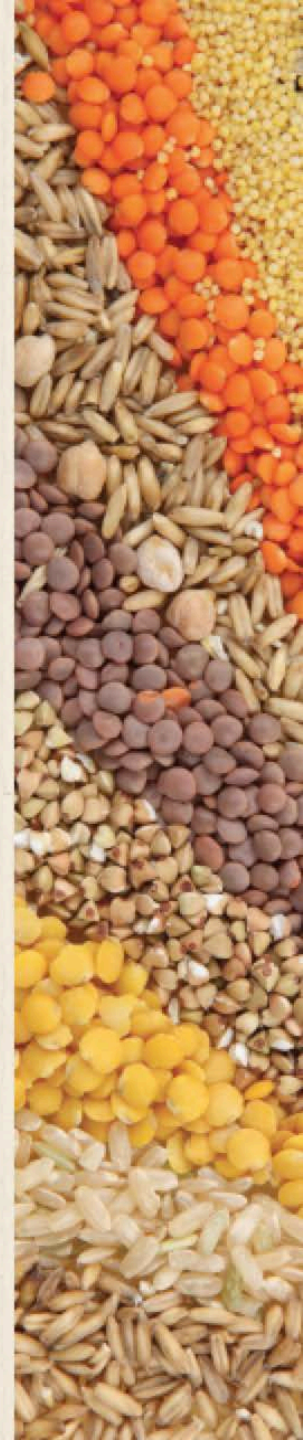
SOUTH AFRICA

SWAZILAND

LESOTHO

TASAI INDICATORS

	A. RESEARCH AND DEVELOPMENT	Crop-specific	Impact on seed access
1	Number of active breeders	Yes	+
2	Number of varieties released in last 3 years	Yes	+
3	Availability of (basic) foundation seed	Yes	+
4	Average age of varieties sold	No	-
5	Percent of varieties with climate-smart features	Yes	+
	B. INDUSTRY COMPETITIVENESS		
6	Number of active crop seed companies	Yes	+
7	Time it takes to import seed from neighboring countries	No	-
8	Market share of top 4 companies	Yes	-
9	Market share of current or past government parastatal	Yes	-
	C. SEED POLICY AND REGULATIONS		
10	Length of variety release process	Yes	-
11	Quality of seed policy framework	No	+
12	Quality of regulatory system	No	+
13	Adequacy of seed inspectors	No	+
14	Efforts to stamp out fake seed	No	+
15	Use of smart subsidies	No	+
	D. INSTITUTIONAL SUPPORT		
16	Availability of extension services	No	+
17	Quality of national seed trade association	No	+
	E. SERVICE TO SMALLHOLDER FARMERS		
18	Concentration of rural agro-dealer network	No	+
19	Availability of seed in small packages	Yes	+
20	Seed-to-grain price ratios at planting time	Yes	?

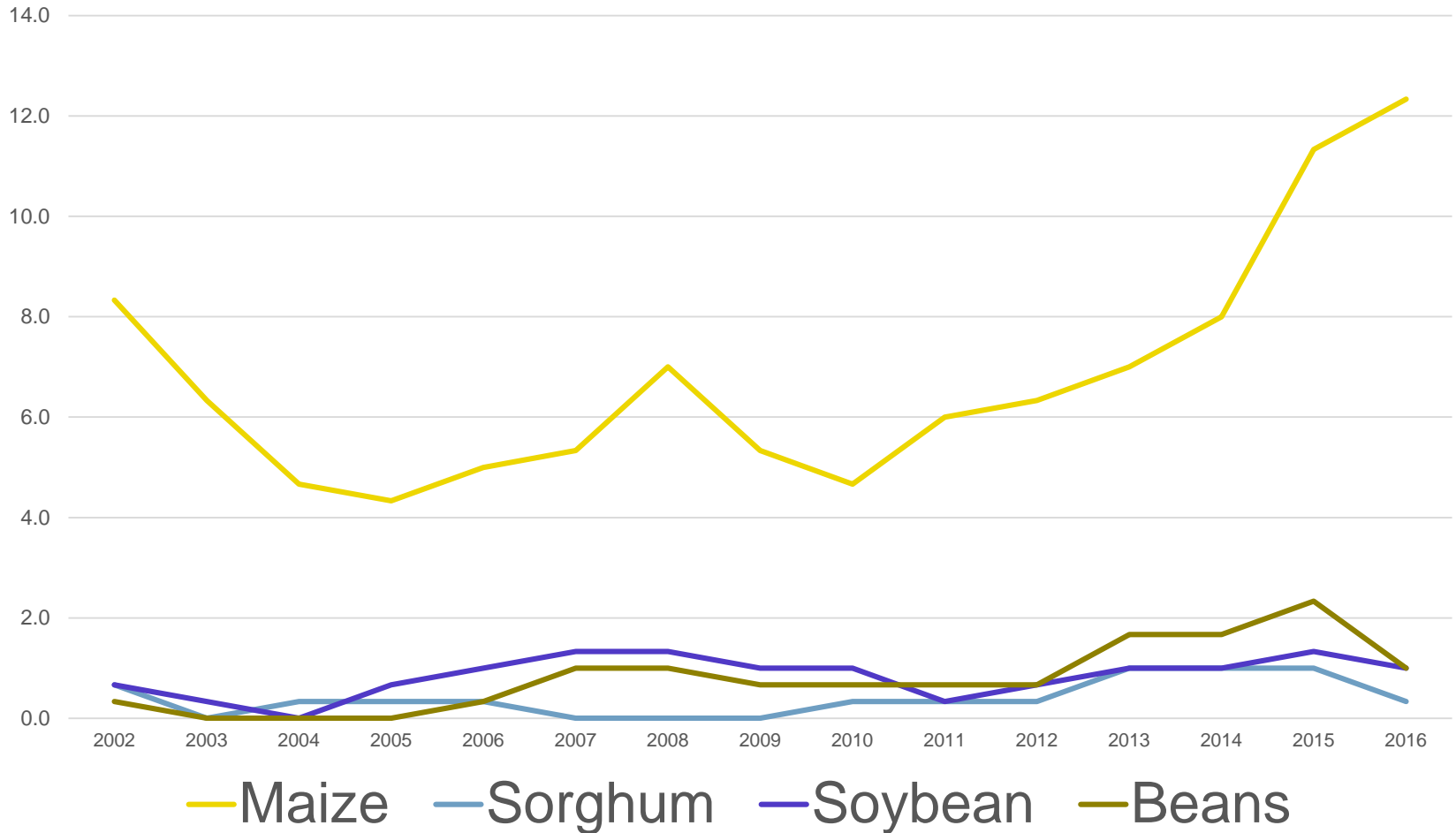


Lesson 1: Maize dominates crop breeding programs

- More varieties released than other crops combined
- More breeders than other crops combined
- Strong correlation between number of breeders and varieties released.

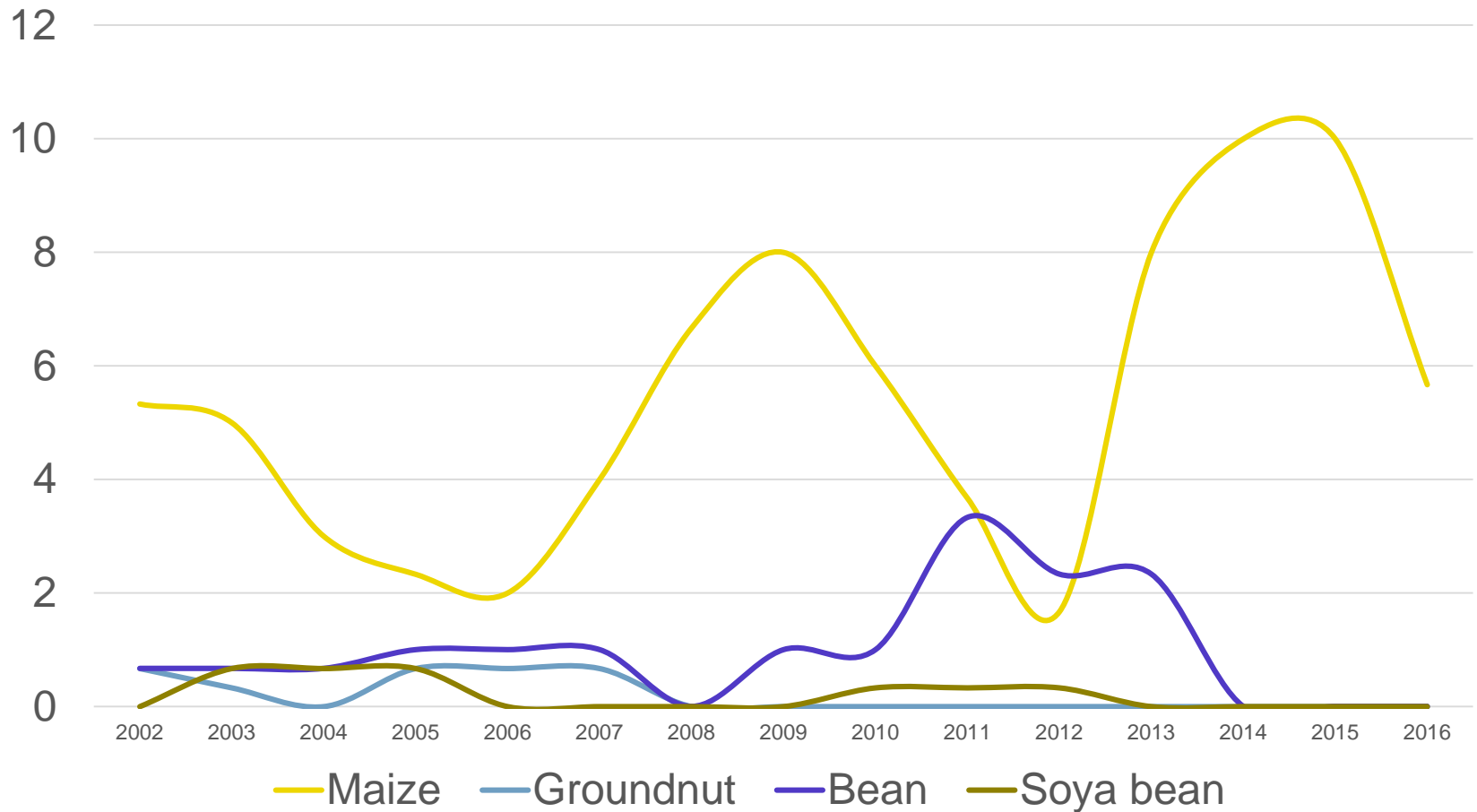
Zimbabwe

(3 year moving average of varieties released)



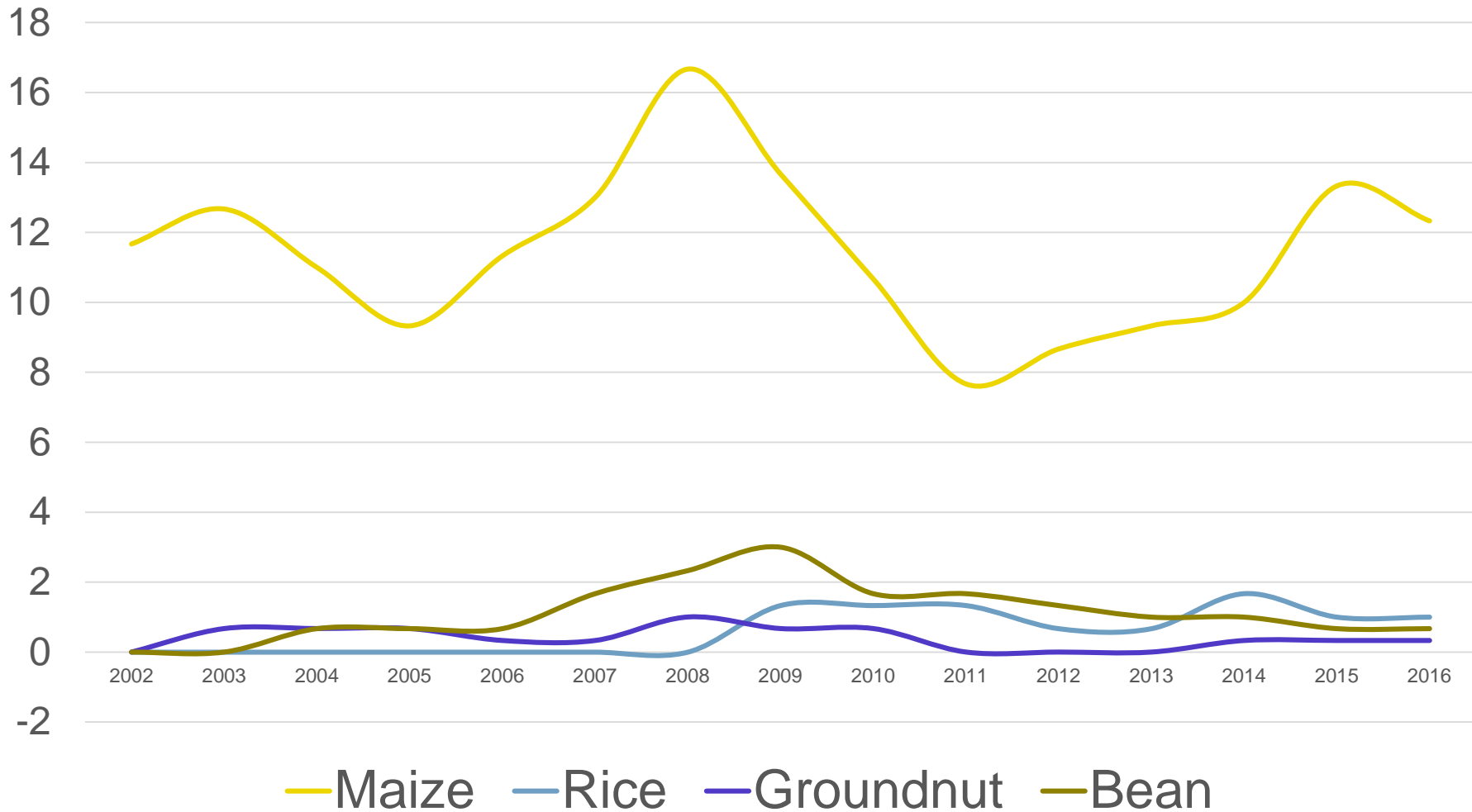
Tanzania

(3 year moving average of varieties released)



Zambia

(3 year moving average of varieties released)



Lesson 2: Old varieties persist despite new varieties being introduced

Country	Age (in years) of maize varieties sold in 2016	
	Average age	Maximum age
Ethiopia	5	11
Ghana	13	24
Madagascar	18.5	26
Malawi	5.7	17
Mozambique	11	21
South Africa	4	16
Tanzania	10	48
Zambia	10	24

Lesson 7: Good policy instruments, but weak implementation

Status of seed policy framework				
	Ethiopia	Ghana	Uganda	Zimbabwe
Seed Policy	2013	2013	Draft	No policy
Seed Law	2010	2010	2006	2001
Seed Regulations	Parliament since 2015	Yet to be passed by parliament	To be gazetted	2016
Seed Plan/Strategy	2013	2015	2015	none

Industry opinion: Enforcement of Seed Regulations				
Score (out of 100)	56	59	42	77
Interpretation	Fair	Fair	Fair	Good

Lesson 8: Steady effort towards privatization of seed inspection services

Number of seed inspectors by sector

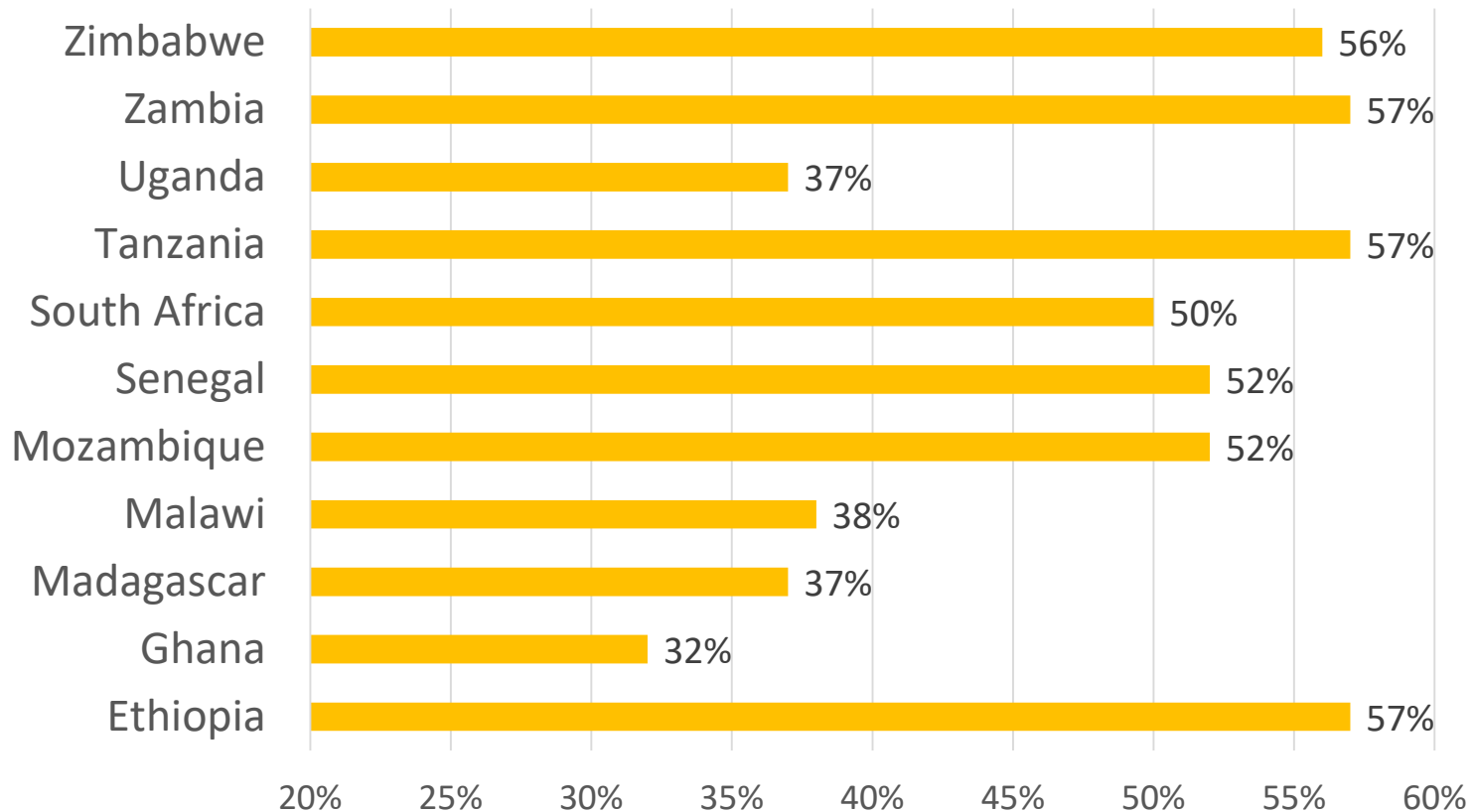
	Eth	Ghana	Malawi	Ghana	SA	Zambia	Zim
Public	32	32	37	32	400	35	46
Private	0	0	0	0	180	83	14
Total	30	32	37	32	580	118	60

Industry opinion: Satisfaction with adequacy of seed inspectors

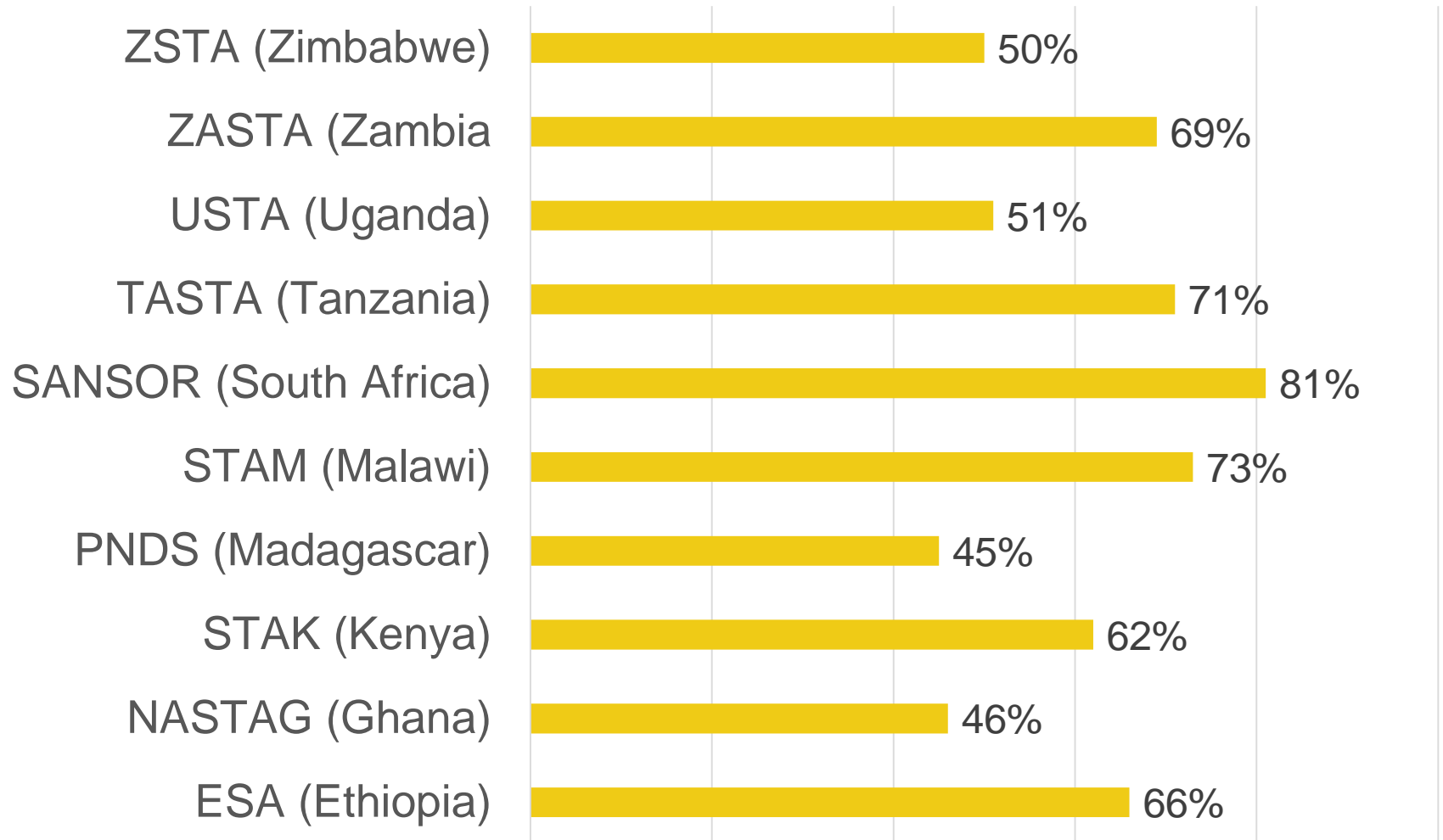
Score (%)	63	48	49	48	79	67	84
Interpretation	Good	Fair	Fair	Fair	Good	Good	Excell't

Lesson 9: Persistent challenge of fake seed

Satisfaction with government efforts to address fake seed
(Industry opinion out of 100%)



Lesson 10: Important role of seed trade associations





TASAI

THE AFRICAN SEED ACCESS INDEX

www.tasai.org

info@tasai.org

Follow us on twitter: [@TASAIIndex](https://twitter.com/TASAIIndex)



USAID
FROM THE AMERICAN PEOPLE

