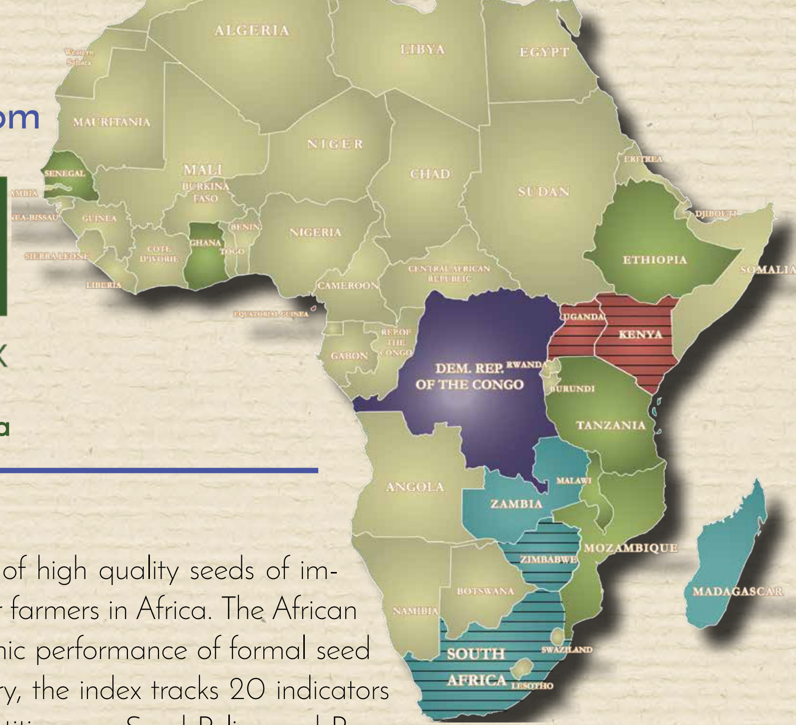
2017 Ten Emerging Lessons from

TASAI

THE AFRICAN SEED ACCESS INDEX



By Edward Mabaya and Mainza Mugoya

Background and Overview

A competitive seed sector is key to ensuring timely availability of high quality seeds of improved, appropriate varieties at affordable prices to smallholder farmers in Africa. The African Seed Access Index (TASAI) appraises the structure and economic performance of formal seed sectors. For the top four grain and legume crops in each country, the index tracks 20 indicators in five categories: Research and Development, Industry Competitiveness, Seed Policy and Regulations, Institutional Support, and Service to Smallholder Farmers. In 2016 and 2017, TASAI conducted studies in 13 countries: Democratic Republic of Congo, Ethiopia, Ghana, Kenya, Madagascar, Malawi, Mozambique, Senegal, South Africa, Tanzania, Uganda, Zambia, and Zimbabwe. Below are the top ten emerging lessons from the country studies.

1 Maize dominates crop breeding programs

In all but three countries, maize dominates formal breeding programs in both research and development investments, and outputs. In most countries, maize breeders account for at least half of the active breeders for the top four food crops, and maize dominates the variety release catalog with at least two thirds of the varieties released in the past three years. In extreme cases, such as Ghana and Malawi, maize is the only crop among the top four food crops with varieties released since 2013.

2 Old varieties persist despite new varieties being introduced

In all countries, many new and better-performing varieties have been released in the last decade. However, in some countries, the average age of some crop varieties on the market is more than 15 years. Examples include Kenya (sorghum and cowpeas), Madagascar (maize and groundnut), Malawi (groundnut), Senegal (all crops), and Tanzania (beans). Without polices to retire dated varieties, popular old varieties persist.

3 Important role of local private seed companies

Apart from South Africa, Zambia and Zimbabwe, at least three quarters of the active seed companies in most countries are local. However, regional multinationals are expanding their presence through strategic partnerships, subsidiaries, and acquisitions.

4 In mature seed sectors, the seed industry is consolidating

Between 2014 and 2016, industry consolidation was the trend in South Africa and Zimbabwe. During this period, both countries witnessed several mergers and acquisitions in the seed industry, which can result in reduced competitiveness.

5 Government role in seed production is diminishing - but there are exceptions

Government-owned seed companies still operate in Ethiopia, Kenya, Madagascar, Tanzania and Zimbabwe. However, except for Ethiopia and Kenya, the market share per crop of current and former government parastatals in most cases is less than 10%.

Notable improvements in regional seed import and export processes

By volume, maize is the most traded seed crop. Kenya, South Africa, Zambia, and Zimbabwe are net exporters of maize seed. For most countries, the seed import/export process takes, on average, less than 30 days. In Tanzania, Uganda, and Zambia, the process can take less than 10 days. However, there were notable challenges with the seed import process in Ethiopia and Ghana, and export processes in Zimbabwe.

Good policy instruments, weak implementation

Most seed companies expressed a high level of satisfaction with the quality of seed policy instruments, including the seed policy, seed act, seed regulations, and seed strategy. However, in most cases, they also expressed a high level of dissatisfaction with the level of enforcement and implementation of these instruments. This is especially true for Ethiopia, Ghana, Malawi and Madagascar. In the worst cases (e.g. in Senegal), the weak enforcement at all stages of the seed value chain is leading to poor-quality seed on the market.

Steady efforts towards privatization of seed inspection services

South Africa, Zambia, and Zimbabwe are the only countries that have more private than public seed inspectors. This has translated to greater efficiency in seed inspection services, and high satisfaction levels by seed companies. Over the past few years, Ghana, Kenya, Malawi, Mozambique, Tanzania, and Uganda have made substantive steps in training and accrediting independent seed inspectors to complement current government efforts.

Persistent challenge of fake seed

Fake seed continues to be a significant challenge in all countries, except South Africa. Seed companies in Madagascar, Malawi, Senegal, Zambia, and Zimbabwe reported more than 20 cases of fake seed in 2016. This is likely to be an underestimate as most cases of fake seed are not reported or recorded. In Ghana, Madagascar, Malawi and Uganda, seed companies are dissatisfied with government efforts to address the challenge of fake seed. However, several countries are taking notable steps to address the challenge. The Seed Trade Association of Kenya (STAK), working closely with the government seed regulator, is leading the effort to have security labels inserted in each packet of seed.

Seed trade associations are an important link between industry and government

SANSOR (South Africa) in many respects is a model seed trade association. SANSOR provides a wide range of services to the seed industry, and its members rate the association's performance as excellent across key service areas. Other associations such as STAK (Kenya), STAM (Malawi), ZASTA (Zambia), TASTA (Tanzania) and USTA (Uganda) are well-recognized, and have a good working relationship with the government aimed at addressing critical issues affecting the industry. ESA (Ethiopia), PNDS (Madagascar), and NASTAG (Ghana) are relatively young and weak, but are growing quickly. AMPROSEM (Mozambique) and UNIS (Senegal) are not very active resulting in poor representation of the seed industry to government and other stakeholders.

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