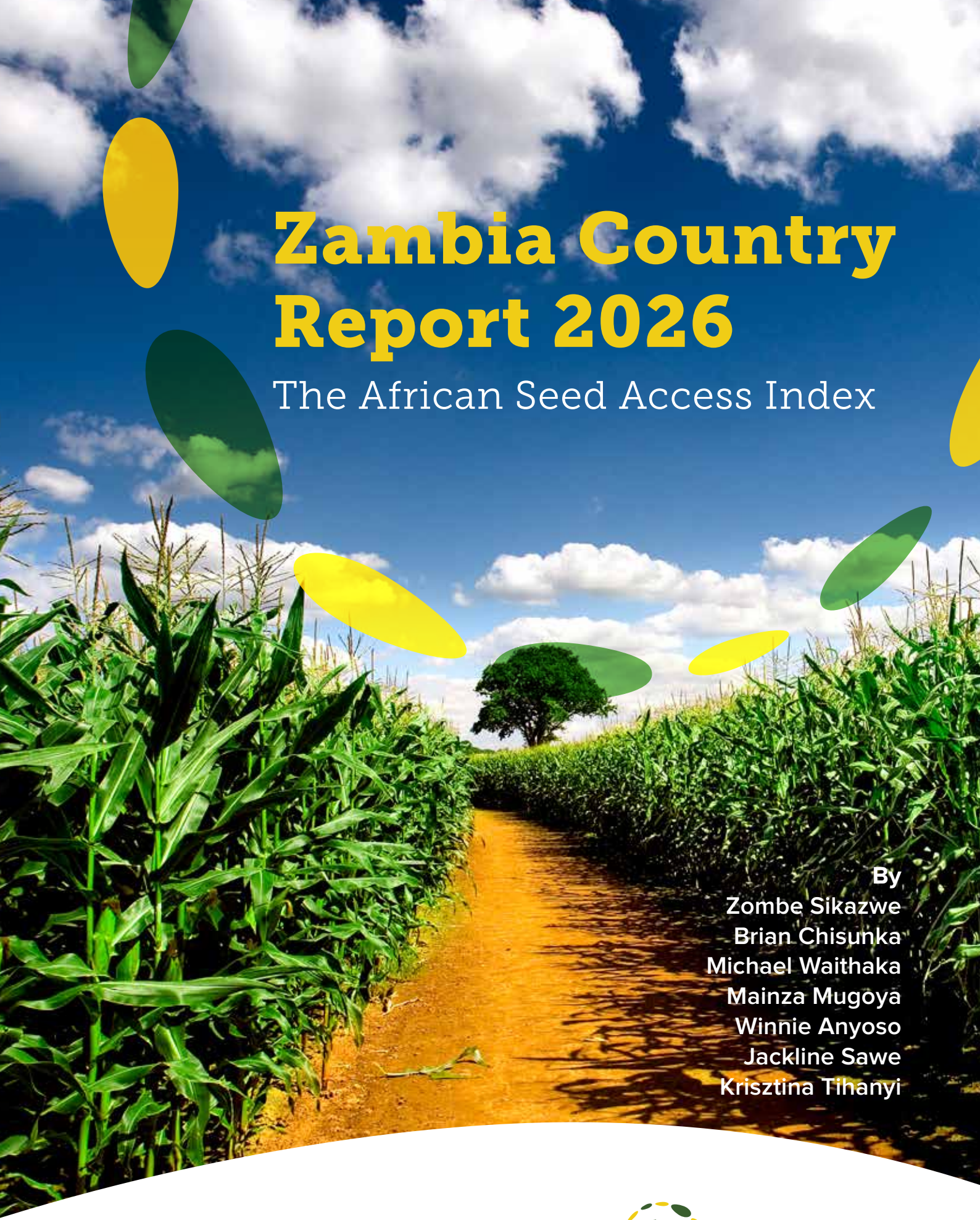


Zambia Country Report 2026

The African Seed Access Index

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TASAI
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LIST OF ACRONYMS

AFSTA	Africa Seed Trade Association
ASSPI	African Seed Sector Performance Index
AUC	African Union Commission
CGIAR	Consultative Group on International Agricultural Research
CIMMYT	International Maize and Wheat Improvement Center
COMESA	Common Market for Eastern and Southern Africa
CR4	Four-firm concentration ratio
DUS	Distinctness, Uniformity and Stability
FAO	Food and Agriculture Organization of the United Nations
FISP	Farmer Input Support Programme
GMO	Genetically Modified Organism
GSB	Government Service Bus
HHI	Herfindahl-Hirschman Index
HSRS	Harmonized Seed Regulatory System
NGO	Non-Governmental Organization
OIC	Orange International Seed Lot Certificate
OPV	Open Pollinated Variety
PQPS	Plant Quarantine and Phytosanitary Service
QDS	Quality Declared Seed
SADC	Southern African Development Community
SCCI	Seed Control and Certification Institute
TASAI	The African Seed Access Index
UNZA	University of Zambia
VCU	Value for Cultivation and Use
VRC	Variety Release Committee
ZARI	Zambia Agriculture Research Institute
ZASTA	Zambia Seed Trade Association

INTRODUCTION

Increased use of productivity-enhancing technologies such as mechanization, irrigation, fertilizer, and improved seed is critical to improving food and nutritional security across Africa. For field crops, a competitive formal seed sector is key to ensuring the timely availability of high-quality seed of improved varieties at affordable prices for smallholder farmers. Improved seed enables the delivery of state-of-the-art technology to farmers through higher yields, disease and pest resistance, climate change adaptation, reduced post-harvest losses, and improved nutrition. To facilitate the delivery of these benefits to farmers, the African Seed Access Index (TASAI) conducts seed industry assessments at the national level and uses the findings to encourage public policymakers and development agencies to create and maintain an enabling environment that will accelerate the development of competitive formal seed systems serving smallholder farmers in Africa.

This report summarizes the key findings of the TASAI study conducted in Zambia in 2026 to assess the structure and economic performance of the country's formal seed sector. This study focuses on the five grain and legume crops important to the country's food and nutritional security (the "five focus crops"). In Zambia, these crops are maize, bean, sunflower, soya bean, and wheat. TASAI country studies typically focus on four crops; wheat was added as a fifth focus crop for this report given its growing importance to Zambia's food and nutritional security. The percentage of farmers using improved seed for four of the five crops is 69% for maize, 11% for bean,[1] 17% for sunflower, and 36% for soya bean (Indaba Agricultural Policy Research Institute 2024). Data for wheat is not available.[2]

OVERVIEW OF ZAMBIA'S FORMAL SEED INDUSTRY

Like most other African countries, Zambia's seed industry consists of two systems: informal and formal. While TASAI recognizes the presence and role of pluralistic seed systems, its Country Reports focus primarily on the formal seed system due to the inherent difficulties of measuring — or obtaining reliable data on — the informal system.

The informal system relies on informal networks to produce, maintain, and distribute seed. These activities "tend to be decentralized and might revolve around local entrepreneurship, seed banking, community-based seed production, or seed villages" (McGuire and Sperling 2016). In many cases, farmers keep grain from the harvest for seed and exchange it with neighbors and relatives or through rural markets. Seed from this system is of variable varietal purity and physical and sanitary quality.[3]

The formal system is a structured and regulated value chain for the production of improved seed varieties. This process involves many actors and institutions, from breeding varieties to the multiplication, processing, and distribution of certified seeds. The different stages of improved seed production are governed by approved regulations and standards. The sale of seed from this system is through limited distribution channels such as registered seed producers, seed stockists, and agro-dealers. The high percentage of maize farmers using improved seed is attributed to several factors, including the Farmer Input Support Programme (FISP), the government input subsidy program, which supplies hybrid maize seed as part of the input package; the government's Food Security Pack, which distributes free hybrid seed to vulnerable households; and the farmer awareness efforts by the private sector (Indaba Agricultural Policy Research Institute 2024).

1 The Agriculture Status Report refers to "mixed bean."

2 Unlike the other four focus crops, wheat in Zambia has historically been grown almost entirely by large-scale commercial farmers, with minimal smallholder participation. A government-led pilot introducing improved rain-fed wheat varieties to smallholder farmers only began in the 2024/25 season, reaching roughly 161 farmers across seven provinces — too recent and small-scale to yield a comparable adoption percentage.

3 See seed system definitions at https://www.agrilinks.org/post/seed-system-definitions



Zambia's formal seed sector is governed by the Plant Variety and Seeds Act (Cap. 236) and the Plant Variety and Seeds Regulations (SI No. 23 of 2018). The law designates the Seed Control and Certification Institute (SCCI), under the Ministry of Agriculture, as the national certifying authority. SCCI licenses all seed sector actors, including seed cooperatives/ growers, processors, sellers, importers, and exporters. Both the licensing process and the associated applications are available online through the Zambia e-services directory (https://eservices.gov.zm/). SCCI trains and licenses private individuals affiliated with registered seed companies and organizations that provide services such as seed inspection, sampling, analysis, and testing. Organizations can also be licensed as certifying agencies. In Zambia, seed production and marketing are undertaken primarily by three groups: seed companies, seed cooperatives/growers' associations, and NGOs.

In Zambia, Quality Declared Seed (QDS) is one of the eight seed classes recognized under the Plant Variety and Seeds Act and Regulations and is subject to mandatory inspection (Government of Zambia 2018). QDS standards apply to all crops except hybrids and Irish potato. For field inspection and laboratory testing, these standards are comparable to those for D seed, the fourth generation of certified seed. However, for most parameters, QDS standards are lower than those for early generation seed classes (breeder and basic seed) and the first three generations of certified seed.

The Fourth Schedule of the Plant Variety and Seeds Act and Regulations establishes Zambia's Seed Certification Scheme, which defines eight classes of seed: pre-basic seed (Class A), produced from the breeder's parent material under the breeder's control and SCCI's supervision; basic seed (Class B), produced from pre-basic seed; four generations of certified seed — C1, C2, C3, and D — each produced from the preceding generation or a higher class; QDS, produced from Quality Declared or higher-class seed; and an emergency class, used only when a serious seed shortage occurs (Government of Zambia 2018).

Table 1 lists the main entities in charge of Zambia's formal seed industry.

Table 1: Role of key players in Zambia's formal seed sector

ROLE	KEY PLAYERS
Research and breeding	Zambia Agriculture Research Institute (ZARI), Consultative Group on International Agricultural Research (CGIAR) centers, Higher learning institutions such as the University of Zambia (UNZA), seed companies
Variety release and regulation	Seed Control and Certification Institute (SCCI)
Seed production and processing	Seed companies, seed cooperatives/ growers' associations, Non-Governmental Organizations (NGOs), research institutions
Education, training, and extension	Institutions of higher learning (e.g., University of Zambia), agricultural colleges under the Ministry of Agriculture, private agricultural colleges, seed companies, NGOs, SCCI and Department of Agriculture, Ministry of Agriculture
Distribution and sales	Seed companies, seed cooperatives/ growers' associations, NGOs



METHODS

TASAI studies cover 22 indicators divided into five categories: **Research and Development**, **Industry Competitiveness**, **Seed Policy and Regulations**, **Institutional Support**, and **Service to Smallholder Farmers** (Table 2). Most TASAI studies rely primarily on performance data from the year before the study is conducted, as this is typically the most up-to-date information available. Accordingly, the data reported in this Country Report pertains primarily to 2025 (the 2024/25 seed marketing season); however, whenever 2026 data is available, it is included in the report.

Table 2: TASAI indicators

		Crop-specific	Impact on seed access[4]
A	**RESEARCH AND DEVELOPMENT**		
A1	Adequacy of active breeders	**Yes**	+
A2	Number of varieties released	**Yes**	+
A3	Number of varieties with 'special' features	**Yes**	+
A4	Availability of basic seed	**Yes**	+
B	**INDUSTRY COMPETITIVENESS**		
B1	Number of active seed companies/producers	**Yes**	+
B2	Quantity of seed produced and sold	**Yes**	+
B3	Number of varieties sold and dropped	**Yes**	+
B4	Average age of varieties sold	**Yes**	-
B5	Market concentration	**Yes**	-
B6	Market share of state-owned seed company	**Yes**	-
B7	Efficiency of seed import/export processes	**Yes**	+
C	**SEED POLICY AND REGULATIONS**		
C1	Length and cost of variety release process	**Yes**	-
C2	Status and implementation of national seed policy framework	**No**	+/-
C3	Harmonization with regional regulations	**No**	+
C4	Adequacy of efforts to eradicate counterfeit seed	**No**	+
C5	Use of government subsidies	**No**	+/-
D	**INSTITUTIONAL SUPPORT**		
D1	Performance of national seed association	**No**	+
D2	Adequacy of seed inspection services	**No**	+
E	**SERVICE TO SMALLHOLDER FARMERS**		
E1	Availability of agricultural extension services for smallholder farmers	**No**	+
E2	Concentration of agro-dealer network	**No**	+
E3	Availability of seed in small packages	**Yes**	+
E4	Seed and grain price at planting time	**Yes**	-

The data includes both quantitative and qualitative measures; the latter comprise satisfaction ratings by industry stakeholders on a 0–100 scale, with the following brackets: 0–19.99% **extremely poor,** 20–39.99% **poor,** 40–59.99% **fair,** 60–79.99% **good,** and 80–100% **excellent.**

4 A plus/minus sign signals a positive/negative correlation between the indicator and smallholder farmers' access to improved seed.



TASAI has conducted similar studies in 23 other African countries; this report therefore draws on relevant cross-country comparisons. Using TASAI survey tools, data collection was focused on three key seed industry players: seed companies, plant breeders, and government entities involved in the country's seed sector. Of these, seed companies were the study's primary source of information. To be eligible for inclusion in the survey, a seed producer must be registered with SCCI and have produced and/or sold certified and/or quality-declared seed for one or more of the five focus crops during the survey year. For several indicators, quantitative data were supplemented with self-reported satisfaction ratings by industry stakeholders (see the rating scale below Table 2). In addition to the surveyed producers, one long-established company producing only basic seed took part as a key informant. Its views on sector institutions (ZASTA, seed inspection, public breeding, counterfeit seed measures, and extension services) are included in the satisfaction ratings, but it is not counted among the surveyed producers.

For maize, two large seed companies did not report sales data. To address this data gap, the study estimated sales by applying a sales-to-availability ratio (reported sales divided by production adjusted for imports and exports) of 0.781, averaged across maize companies with plausible, complete data. This estimation was applied only to maize, and only to these two companies.

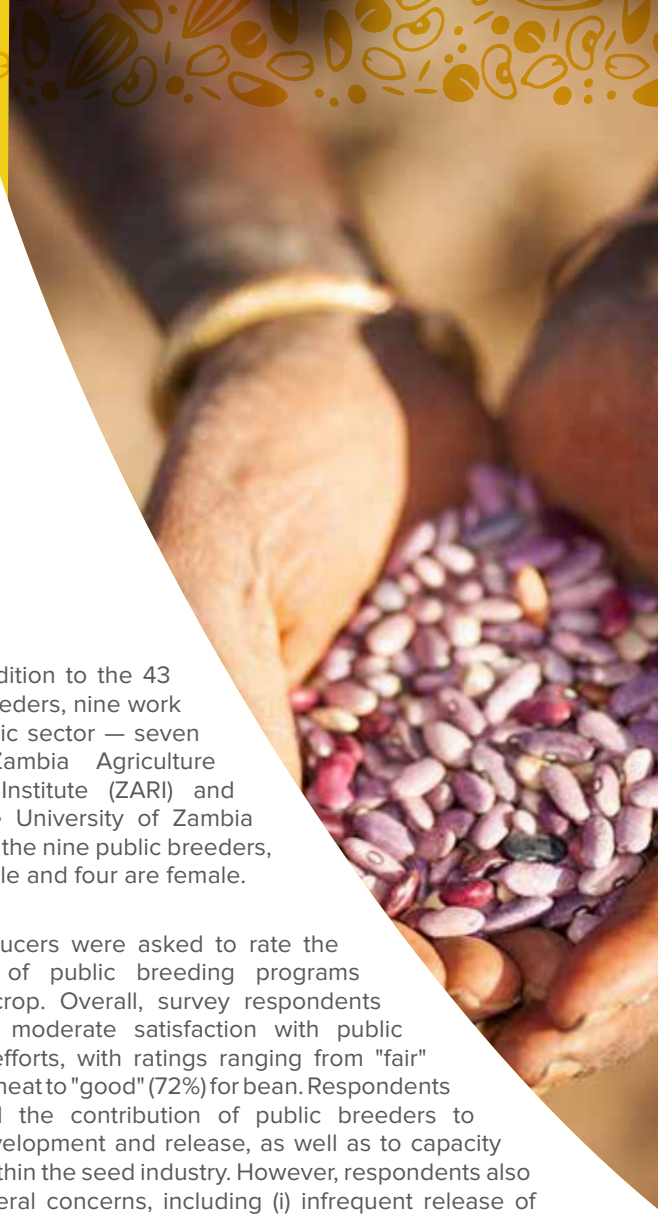
In the 2024/25 seed marketing season, the official SCCI list included 80 registered seed producers for the five crops. Of these, 29 were outgrowers, research institutions, or companies producing only early-generation seed; these are routinely excluded from TASAI samples. This left 51 targeted producers: 39 seed companies, seven seed cooperatives/growers' associations, three NGOs, and two research institutions. Eleven of the 51 were inactive, meaning that they did not buy or sell seed during the data collection year, leaving 40 active seed producers. Data were collected from 39 of the 40 active producers: 32 seed companies, three seed cooperatives, three NGOs, and one research institution (Table 3). One seed grower association was not surveyed because it produced a negligible volume of QDS, which would not have changed the survey results meaningfully.

Table 3: Breakdown of seed producers by type (2024/25)

Producers	Seed companies	Seed cooperatives/ growers' associations	NGOs	Research institutions	Total
Registered seed producers	40	33	3	4	80
Targeted seed producers	39	7	3	2	51
Active seed producers[5]	32	4	3	1	40
Surveyed seed producers	32	3	3	1	39

5 These are the active producers, out of the targeted seed producers, and not the registered seed producers.

RESEARCH AND DEVELOPMENT



NUMBER OF ACTIVE BREEDERS

A functioning seed system needs vibrant public and private breeding programs to develop improved varieties that respond to farmer and consumer needs. The number of active public breeders indicates the level of investment in research and development.[6] In addition to tracking the number of breeders working on the five focus crops, the study measured the level of satisfaction reported by seed companies/producers with the public breeding programs. The latter reflects the ability of active breeders in public institutions[7] to produce new varieties.

Zambia has 52 active breeders working on the five crops (Table 4). By crop, 30 work on maize, six on bean, five on sunflower, eight on soya bean, and four on wheat; these figures sum to 53 because one public breeder works on two crops (bean and soya bean) and is counted under each.[8] Eighty-three percent of breeders (43 out of 52) are in the private sector, with maize accounting for the largest share (28). In addition to the 43 private breeders, nine work in the public sector — seven at the Zambia Agriculture Research Institute (ZARI) and two at the University of Zambia (UNZA). Of the nine public breeders, five are male and four are female.

Seed producers were asked to rate the adequacy of public breeding programs for each crop. Overall, survey respondents expressed moderate satisfaction with public breeding efforts, with ratings ranging from "fair" (58%) for wheat to "good" (72%) for bean. Respondents recognized the contribution of public breeders to variety development and release, as well as to capacity building within the seed industry. However, respondents also raised several concerns, including (i) infrequent release of new maize varieties, (ii) limited collaboration between seed companies and public wheat breeders, and (iii) inadequate quality of basic seed for sunflower varieties.

6 TASAI studies define an "active breeder" as one currently engaged in breeding or maintaining a variety, or one who had developed and released at least one variety, or was developing one, at the time of the TASAI study.

7 The goal of this indicator is to assess the vibrancy of public breeding programs. Therefore, TASAI does not assess the adequacy of breeders from the CGIAR centers since their mandates cover multiple countries and regions.

Table 4: Number of active breeders (2025)

Crop	Private breeders			Public breeders			Total	Satisfaction rating
	Male	Female	Total	Male	Female	Total		
Maize	25	3	28	1	1	2	30	66%
Bean	4	0	4	2	0	2	6	72%
Sunflower	3	1	4	0	1	1	5	61%
Soya bean	4	1	5	2	1	3	8	62%
Wheat	1	1	2	1	1	2	4	58%
Total	**37**	**6**	**43**	**6**	**4**	**10[8]**	**53**	**64%**

extremely poor | poor | fair | good | excellent

8 The public breeding workforce comprises nine individuals (five male, four female). One UNZA breeder works on both bean and soya bean and appears in both crop rows, so the crop rows sum to 10 public breeders and 53 in total. Private breeder numbers are reported by crop, and each entry is counted as a separate individual.

VARIETIES RELEASED IN THE LAST THREE YEARS (2023–2025)

The number of varieties released is a key indicator of a functioning variety development and release system. New varieties also carry desired traits beyond yield gains, including climate resilience, resistance to disease and pests, and nutritional enhancements.

Variety development in Zambia is predominantly private-sector-led. A total of 69 varieties were released for the five crops between 2023 and 2025 (Seed Control and Certification Institute 2025). Of these, 49 were maize, nine bean, five soya bean, five wheat, and one sunflower. Private companies accounted for 63 of the 69 releases (91%); the remaining six were released by public institutions — three maize and two wheat varieties from ZARI, and one bean variety from UNZA (Table 5).

Zambia is an active member of both the Common Market for Eastern and Southern Africa (COMESA) and the Southern African Development Community (SADC), and is a signatory to regional seed harmonization arrangements for both economic blocs. By the end of 2025, a total of 41 varieties from the two regional variety catalogues were listed in the Zambia variety list: 36 varieties from the COMESA Variety Catalogue and seven varieties from the SADC Variety List, two of which are listed in both. Most of the varieties were originally released in Kenya, Egypt, and Uganda.

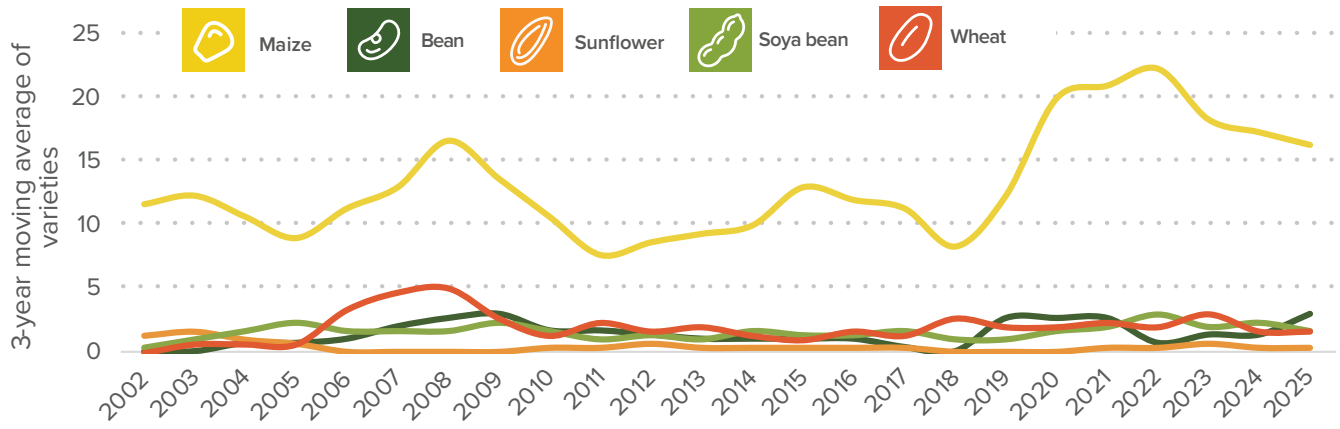
Figure 1 shows the three-year moving average[9] of variety releases from 2002 to 2025.

9 A 3-year moving average is a statistical method that tracks the average number of releases for the last three years (that is, current year and two prior years); this method reduces the impact of random spikes in the number of variety releases.

Table 5: Varieties released by sector (2023–2025)

Crop	Public (ZARI/UNZA)	Private	Total
Maize	3	46	49
Bean	1	8	9
Sunflower	0	1	1
Soya bean	0	5	5
Wheat	2	3	5
Total	**6**	**63**	**69**

Figure 1: Trend in the number of varieties released between 2002 and 2025 (Three-year moving average)



VARIETIES WITH SPECIAL FEATURES

Varieties may have special characteristics, for instance, climate-smart,[10] use-related (e.g., fast-cooking or nutrition-enhanced), or industry-demanded features (e.g., suitability for making starch, suitability for livestock feed, high-oil content etc.).

Eighty-seven percent of the released varieties (60 out of 69) have at least one special feature (Table 6). Climate-smart features are the most prevalent: 50 varieties carry drought tolerance, early maturity, suitability for irrigated production, or a combination of these, predominantly in maize, where 43 of 49 released varieties have at least one climate-smart attribute. Bean varieties are primarily characterized by use-related features, particularly fast cooking (six of nine) and nutrient enhancement. Industry-demanded features span all five crops: four of five soya bean varieties have high oil content, three wheat varieties have a high milling percentage, and all five soya bean varieties and four of nine bean varieties (44%) meet canning industry standards (Table 6).

Table 6: Number of varieties released that have special features

Feature	Description of feature	Number of varieties released 2023–2025					
		Maize	Soya bean	Bean	Sunflower	Wheat	TOTAL
All varieties released		49	5	9	1	5	**69**
All varieties released with special features		43	5	8	1	3	**60**
Climate smart features	All climate-smart features	43	2	1	1	3	**50**
	Drought tolerant	35	0	0	1	1	**37**
	Early / extra-early maturing	31	2	1	0	0	**34**
	Irrigated	0	0	0	0	3	**3**
Use-related features	All use related features	1	0	6	0	0	**7**
	Fast cooking	0	0	6	0	0	**6**
	Nutrition enhanced features	1	0	3	0	0	**4**
Industry-demanded features	All industry-demanded features	7	5	4	1	3	**20**
	High oil content	0	4	0	1	0	**5**
	Protein content	0	4	2	0	3	**9**
	High milling/ canning percentage	7	5	4	1	3	**20**

10 While acknowledging the increase in biotic stresses (pests, weeds, and diseases) due to climate change, TASAI studies narrowly define "climate-smart features" as those that respond to extreme weather events, such as droughts, floods, and frost, that affect current farming practices. Examples of climate-smart features are drought tolerance, early maturity, or extra-early maturity. Suitability for irrigated production is also counted as a climate-smart feature because irrigation buffers crop production against variable rainfall; three wheat varieties released in 2023–2025 carry this feature.



SOURCES AND AVAILABILITY OF BASIC (FOUNDATION) SEED

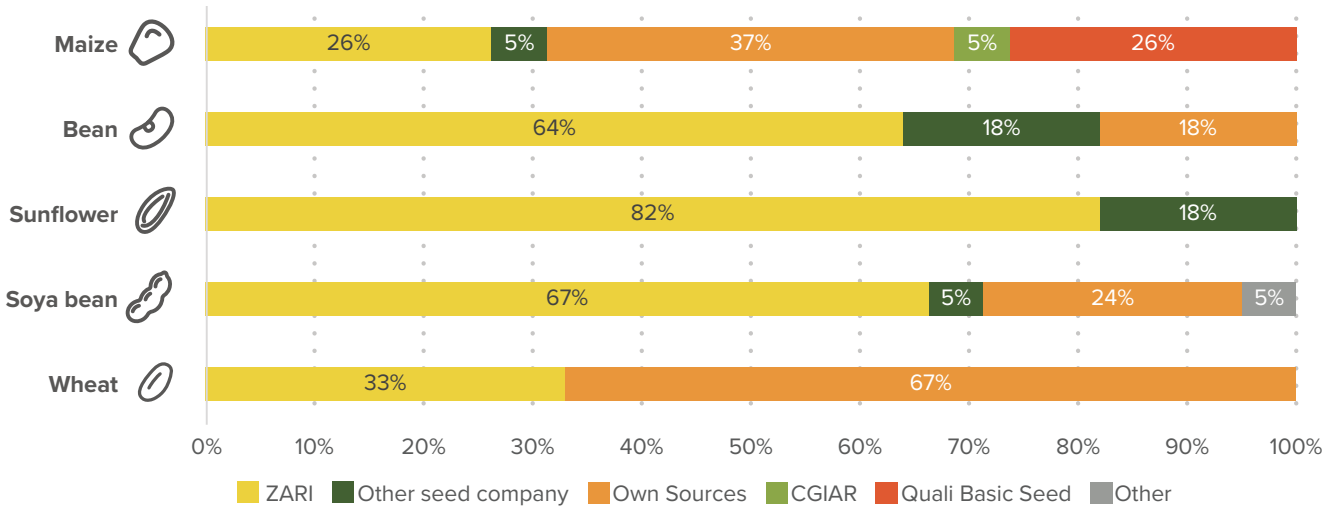
Seed companies use basic (foundation) seed to produce certified seed for sale to farmers. The availability of quality basic seed — whether sourced from public research institutions, private suppliers, or in-house production — is a key determinant of seed companies' ability to produce certified seed at scale.

Sources of basic seed

The dominant source of basic seed varies by crop (Figure 2). Own production accounts for the largest share of the sources named for wheat (67%) and maize (37%), while ZARI accounts for the largest share for sunflower (82%), bean (64%), and soya bean (67%). Maize has the most diversified supply base, with five sources named: own production, ZARI, and Quali Basic Seed — a private company specializing in basic seed production — at 26–37% each, plus CIMMYT, a CGIAR center (5%), and other seed companies (5%). By contrast, wheat relies on just two sources — own production and ZARI — with no other commercial supplier.

Other seed companies play a secondary role, accounting for 18% of the sources named for bean and sunflower, with smaller shares for maize (5%) and soya bean (5%). Sunflower is the only crop for which no producers source basic seed from own production, making it the most dependent on external supply.

Figure 2: Sources of basic seed named by seed producers (% of sources named)



Process to obtain basic seed from ZARI

The Zambia Agriculture Research Institute (ZARI) is the primary source of basic seed for publicly bred varieties across the five crops. To access basic seed from ZARI, seed companies submit a request to the ZARI Seed Business Unit, which forwards it to the relevant breeding program. The breeding program shares the licensing terms for the variety. If the company accepts them, it submits a formal application for commercialization. Once both parties agree, the seed company signs a variety licensing agreement with ZARI. ZARI licenses maize hybrids under an exclusive arrangement, while OPVs are licensed on a non-exclusive basis. The agreements require commercialization within four years, and the company pays royalties to ZARI based on the annual volume of seed produced.

ZARI produces basic seed in accordance with the standards set under the Plant Variety and Seeds Act (Cap. 236) of the Laws of Zambia. SCCI inspects and certifies the production process. For self-pollinating crops (bean, soya bean, and wheat), companies receive basic seed of the released variety for multiplication into certified seed. Maize is different: because most maize varieties are hybrids, companies receive parental lines from the breeding programs — typically 1,000 kernels per line — which they cross to produce hybrid seed. Once the basic seed is ready for collection, the company is notified, makes payment to ZARI as specified in the licensing agreement, and collects the seed upon presenting proof of payment. The University of Zambia follows the same licensing process for its publicly bred varieties.



Seed companies' assessment of basic seed

Seed companies rated their satisfaction with basic seed across three dimensions — quantity received, quality, and delivery timeliness (Table 7). Overall ratings are highest for wheat (91%) and maize (88%), and lowest for sunflower (75%). Quality is the most variable dimension: maize seed scores 90%, while sunflower seed is rated at only 68%. Bean scores lowest on quantity received (75%), and wheat highest on delivery timeliness (97%), though the wheat sample is small (n = 3).

Four soya bean companies reported that the basic seed was contaminated with off-types (seeds that deviate from the expected variety characteristics) and had to be cleaned before use. More than half of sunflower producers (9 of 17) reported quality concerns — primarily admixtures (physical mixtures of seeds from other varieties) and off-types — consistent with the 68% quality rating, the lowest score in the table. A smaller share cited insufficient volumes delivered.

Table 7: Seed companies' assessment of the availability of basic seed (2025)

Aspect of availability of basic seed	Maize (n=20)	Bean (n=22)	Sunflower (n=17)	Soya bean (n=22)	Wheat (n=3)
Quantity of basic seed received (out of 100%)	88%	75%	76%	85%	90%
Quality of basic seed received (out of 100%)	90%	87%	68%	83%	87%
Delivery timeliness (out of 100%)	87%	83%	82%	90%	97%
Overall availability of basic seed (out of 100%)	88%	82%	75%	86%	91%

extremely poor | poor | fair | good | excellent



INDUSTRY COMPETITIVENESS

NUMBER OF ACTIVE SEED PRODUCERS

The presence of many active seed producers drives competition, creating incentives to innovate across the seed value chain. A vibrant seed sector depends on a robust private sector in which seed businesses invest in developing crop varieties and in producing, processing, and marketing certified seed of improved varieties to farmers.

The TASAI survey reached 39 of the 40 active producers: 32 seed companies, three seed cooperatives/growers' associations, three NGOs, and one research institution. Table 8 shows the breakdown of the surveyed seed producers by entity type and crop. Maize has the most producers (26), followed by sunflower (21) and soya bean (18 certified, 17 QDS). Wheat has the fewest, with five producers.

Table 8: Number of active and surveyed seed producers

Crop	Seed companies	Seed cooperatives/ growers' associations	NGOs	Research institutions	Total
Maize	25	1	0	0	**26**
Bean (certified)	16	2	0	0	**18**
Bean (QDS)	11	1	1	0	**13**
Sunflower	18	1	2	0	**21**
Soya bean (certified)	15	1	1	1	**18**
Soya bean (QDS)	12	2	3	0	**17**
Wheat	5	0	0	0	**5**
Total[11]	**32**	**3**	**3**	**1**	**39**

Staff training levels

Highly trained staff are essential for the effective operation of seed companies. Table 9 presents the percentage of surveyed seed producers who employ staff with university degree or short-course training in seed science, plant breeding, or agricultural sciences. Overall, 79% of producers have at least one staff member trained at one or both levels. Most seed producers have staff with training in seed science (72%) or agricultural sciences (74%), while fewer have staff with training in plant breeding/genetics (46%).

11 The total row reports 39 surveyed seed producers. The total number of active producers by crop exceeds the number of producers because a single producer usually produces more than one crop.

Table 9: Staff training levels

Training topic	Percentage of seed producers (out of 39) that have staff with various levels of training		
	Degree training	Short course training	Overall
Seed Science	46%	64%	72%
Plant Breeding/ Genetics	41%	38%	46%
Agricultural Sciences	67%	59%	74%
Overall	74%	74%	79%

Gender in the management of seed businesses

TASAI studies also track the number of women in management and ownership positions in seed companies with clearly defined management structures. They include the following positions or their equivalents: managing director/chief executive officer, distribution manager, operations manager, finance and administration manager, research and development manager, country lead, and sales and marketing manager.

Table 10 shows the number and proportion of women involved in senior management positions in the seed enterprises surveyed. Of the 19 entities for which ownership data is available[12], four (21%) are owned by women. Eight of 39 entities (21%) have a female top manager. Across all 278 management positions surveyed, women hold 97 (35%).

Table 10: Gender in management in seed businesses

Gender indicator	Number	Percentage
Companies with a female owner (n=19)	4	21%
Entities with female top manager (n=39)	8	21%
Women in management positions (n=278)	97	35%

PRODUCTION AND SALE OF CERTIFIED SEED

To measure the overall size of a country's seed sector, TASAI tracks the volumes of seed produced and sold for the focus crops. Table 11 shows the volume of certified seed and QDS produced and sold in Zambia during the 2024/25 marketing season. The data is from two sources: SCCI and the TASAI survey of seed producers.

Zambia is a major producer of maize seed. According to SCCI, 178,515 MT of maize seed was produced during the 2024/25 season (Table 11); certified seed production for the other four crops was substantially lower. Company survey data differed from SCCI records for all five crops. Producers reported higher volumes than SCCI for bean (3,285 MT against 2,098 MT) and soya bean (14,027 MT against 11,435 MT), and lower volumes for maize (135,979 MT against 178,515 MT), sunflower (1,473 MT against 1,822 MT), and wheat (3,402 MT against 3,933 MT). Both sources are based on actual production reported by seed companies; the reasons for the differences could not be established.

12 This indicator only applies to entities for which ownership can be attributed to a single individual. As such, it excludes entities whose ownership is Board or shareholders.



Unlike production, seed sales volumes are captured only through the TASAI survey — SCCI does not collect sales data. For maize, two large companies did not report sales figures; to avoid understating the market, their sales were estimated using a trimmed sales-to-availability ratio of 0.781 (78%), applied to each company's adjusted production volume (see Methods for the calculation approach). This ratio is consistent with normal market dynamics, where sales typically run somewhat below production because (i) agro-dealers often return unsold seed to seed companies, (ii) seed companies carry over some stock between seasons, and (iii) government encourages seed companies to retain a strategic reserve of seed — supporting the plausibility of the 78% estimate for the two non-reporting companies.

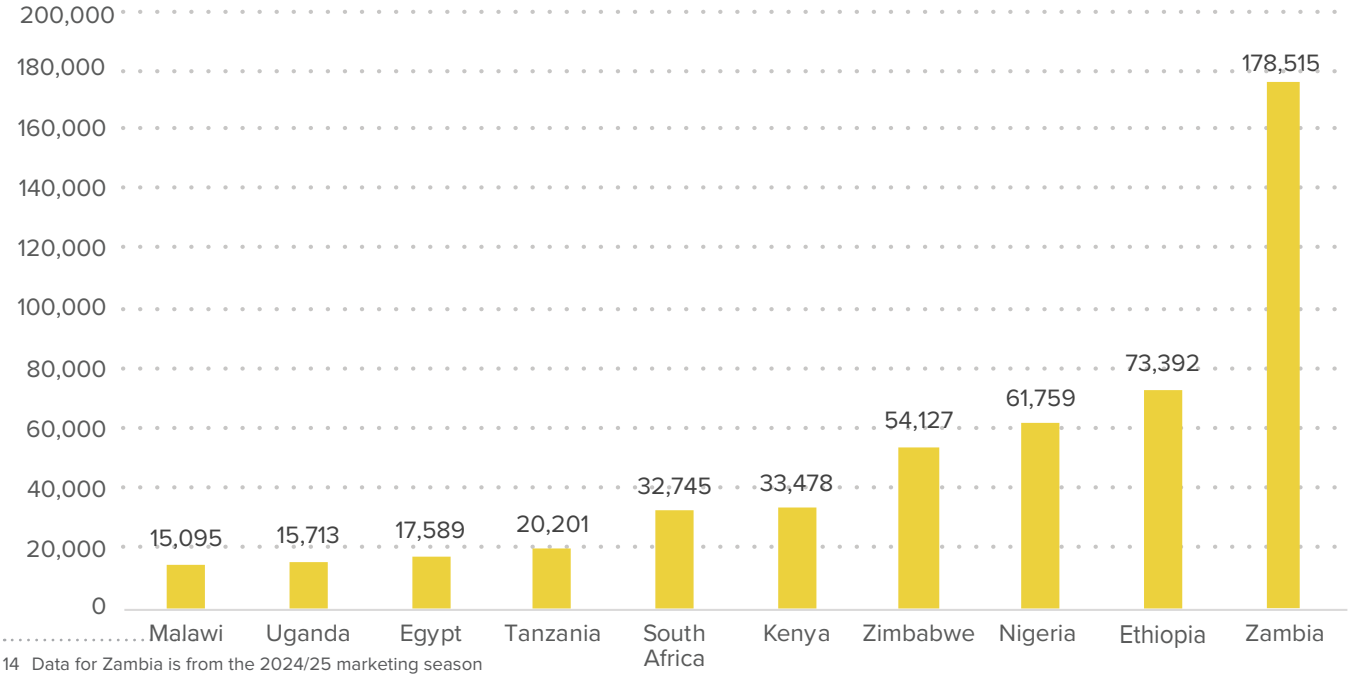
Figure 3 shows the production of certified maize in 10 of the largest maize-seed-producing countries in Africa in 2024 (AUC, TASAI, and AGRA, forthcoming). Zambia is by a wide margin the largest maize seed producer among the ten leading countries. It is also a major seed exporter across Africa.

Table 11: Seed production volumes (2024/25)

Crop	Production of certified seed (in MT)		QDS production (in MT)		Seed sales (certified + QDS) (in MT)
	Government data	TASAI survey data	Government data	TASAI survey data[13]	
Maize	178,515	135,979	241	-	93,502
Bean	2,098	3,285	623	1,882	4,265
Sunflower	1,822	1,473	1,467	-	1,231
Soya bean	11,435	14,027	2,648	3,207	15,388
Wheat	3,933	3,402	5	-	2,610

13 SCCI records QDS production for all five crops; the TASAI survey only sought information on QDS production for bean and soya bean, so the QDS figures shown for maize, sunflower, and wheat reflect government data only.

Figure 3: Maize seed production in selected African countries[14]



14 Data for Zambia is from the 2024/25 marketing season

NUMBER OF COMMONLY SOLD VARIETIES IN 2025

A larger number of varieties sold in a country often gives farmers a wider choice. The survey asked seed companies to name their three best-selling varieties. Table 12 shows the names and profiles of the commonly sold varieties for the five crops, including both certified and QDS maize. Companies reported 44 distinct certified maize varieties among their top 3 bestsellers. Six were each sold by two companies. DK 777 is named in Table 12; the remaining 43 varieties are grouped as "various" because company-specific variety names cannot be disclosed. Among the QDS maize varieties shown, two of the seven reported by companies are named individually in Table 12; the remaining five are sold by one company each.

ZM 521 and ZM 621 are the two main commonly sold maize Open-Pollinated Varieties (OPVs) produced under the QDS seed scheme. Both are climate-smart varieties developed by CIMMYT. Mbereshi is the leading bean variety for both certified and QDS seed, valued for its nutritional benefits that include biofortification with zinc and iron, as well as its cooking quality and taste. Lungwebungu is another preferred bean variety because it cooks quickly and has good taste.

Seed companies and other entities identified only two widely sold sunflower varieties: Milika and Saona. Milika is commonly sold because it is readily available. In addition, seed producers highlight its high oil content, drought tolerance, and low fertilizer requirements as other reasons. For soya bean, Kafue is the most commonly sold variety for both certified seed and QDS producers. It is readily available, broadly adapted, and well known to farmers. It is also early-maturing and relatively resistant to shattering.

No wheat variety is widely sold by more than one seed company. The best-selling varieties are SST 8843, SC Shungu, and SC Nduna, all of which are privately owned. Their popularity is mainly due to traits such as high yield and good baking quality.

Table 12: Name and number of commonly sold varieties (2025)

Crop	Number of varieties sold	Name of commonly sold variety	Number of seed producers selling variety	Reasons for popularity
Maize (certified)	44	DK 777	2	-
		various	48	High yield, drought tolerance, grain quality, disease tolerance/ resistance, early/medium maturity
Maize (QDS)	7	ZM 521	6	Drought tolerance, high yield
		ZM 621	3	Medium maturity, high yield
Bean (certified)	9	Mbereshi	12	Biofortified with zinc and iron, fast-cooking
		Lungwebungu	6	Fast-cooking; good taste (sugar bean variety), good for canning, good for export
		PAN 148	2	High yield
Bean (QDS)	3	Mbereshi	13	Biofortified with zinc and iron, sweet taste, cooks well, performs well in low rainfall areas
		Kabulangeti	4	Easy to grow, produces good soup
		Lungwebungu	2	Fast-cooking, good taste

Sunflower	2	Milika	14	Readily available, high oil content, drought tolerance, wide adaptation, low fertilizer requirement
		Saona	3	High oil content, drought tolerance
Soya bean (certified)	8	Kafue	14	Readily available, farmers are familiar with this variety, early maturity, high yield, does not shatter readily
		Dina	3	High yield and does not shatter readily
Soya bean (QDS)	2	Kafue	9	High yield, early maturity, drought tolerance
		Lukanga	2	High yield, late maturity in high rainfall areas
Wheat	3	SST 8843	1	High yield and good quality protein
		SC Shungu	1	Wide adaptation, high yield
		SC Nduna	1	High yield, good baking quality

AGE OF VARIETIES SOLD

In vibrant seed systems, new varieties are regularly developed and released for commercial use, and farmers are expected to replace old varieties with new ones. In many African countries, old varieties persist, even though newer varieties often outperform older varieties as they are bred for traits that respond to demands by farmers, consumers, and industry. A lower average age of varieties signals higher rates of variety turnover. TASAI tracks the age of the commonly sold varieties.

Table 13 presents the ages of the commonly sold varieties for the five crops, including certified maize. Year of release is presented only for DK 777, the certified maize variety named in Table 12 — released in 2015, it is 10 years old; the other 43 certified maize varieties are reported only in aggregate, without individual age data. As a result, the age profile shown here remains a partial picture of the varieties used by farmers in Zambia. That said, the two commonly sold maize QDS varieties, ZM 521 and ZM 621, are both 21 years old — consistent with breeding programs' focus on hybrid, rather than OPV, maize development. Bean varieties show a similar age profile across both market segments: certified varieties range from 11 to 19 years old (averaging 14), and QDS varieties range from 11 to 18 years old (also averaging 14), with Mbereshi — 13 years old — commonly sold under both schemes.

Soya bean varieties are the most consistent across segments: Kafue is 10 years old in both the certified and QDS categories, and the second commonly sold variety is 22 years old (Dina, certified) or 21 years old (Lukanga, QDS). Sunflower varieties are the oldest of the five crops, at 28 and 34 years. Both of these popular varieties are public varieties; varieties released since 2000 have been privately developed and sold by one company only. Wheat varieties are comparatively younger, ranging from 8 to 19 years old. Notably, all three commonly sold varieties are privately owned, even though six public varieties have been released since 2011 by ZARI and the University of Zambia.



Table 13: Age of commonly sold varieties (2025)

Crop	Name of commonly sold variety	Year of release	Age of variety (in 2025)
Maize (certified)	DK 777	2015	10
Maize (QDS)	ZM 521	2004	21
	ZM 621	2004	21
Bean (certified)	Mbereshi	2012	13
	Lungwebungu	2014	11
	PAN 148	2006	19
Bean (QDS)	Mbereshi	2012	13
	Kabulangeti	2007	18
	Lungwebungu	2014	11
Sunflower	Milika	1997	28
	Saona	1991	34
Soya bean (certified)	Kafue	2015	10
	Dina	2003	22
Soya bean (QDS)	Kafue	2015	10
	Lukanga	2004	21
Wheat	SST 8843	2017	8
	SC Shungu	2009	16
	SC Nduna	2006	19

MARKET SHARE OF TOP SEED PRODUCERS

Competition among seed producers benefits farmers through lower prices, wider choice, greater innovation, and better customer service. To assess market concentration, TASAI uses each crop's seed sales data to calculate the four-firm concentration ratio (CR4) and the Herfindahl-Hirschman Index (HHI).[15] For maize, this includes estimated sales for the two companies that did not report data (see Methods). Bean and soya bean sales combine certified and QDS seed, since both classes contribute to the same overall market.

The bean, sunflower, and soya bean markets are competitive: the top four companies hold between 64% (bean) and 73% (soya bean) of sales, and HHI values ranging from 1,333 (bean) to 1,750 (soya bean) indicate relatively low concentration (Table 14). The maize market sits at the lower boundary of the moderate range: the top four companies hold 76% of estimated sales and the HHI is 2,000. Wheat is the exception. With only five active producers, its market is extremely concentrated (HHI of 5,284).

15 The HHI is a measure of market concentration and is calculated by squaring the market share of each firm competing in a market and then adding up the results. It ranges from close to zero for perfect competition to 10,000 for monopoly. The scale for HHI scores ranges from extremely low to extremely high levels of market concentration: less than 1,000 is extremely low, 1,000–1,999 is low, 2,000–2,999 is moderate, 3,000–3,999 is high, and greater than 4,000 is extremely high, i.e., monopoly or near monopoly.

Table 14: Market concentration (2025)

Market concentration indicator	Maize	Bean	Sunflower	Soya bean	Wheat
Market share of top four seed producers (CR4)	76%	64%	70%	73%	100%
HHI	2,000	1,333	1,416	1,750	5,284

extremely low | low | moderate | high | extremely high

MARKET SHARE OF GOVERNMENT PARASTATAL

In some countries, public entities are active participants in seed production, marketing, and distribution. Public seed companies can play a critical role in meeting farmer demand for crop varieties that private seed companies deem less profitable. In addition to seed production, public companies may support other national objectives, such as university training and research. However, state-owned companies may benefit from preferential treatment, less stringent enforcement of regulations, access to competitor information, and indirect production subsidies. Together, these advantages can distort competition with private seed companies. Zambia has no government-owned seed company at the time of the study.

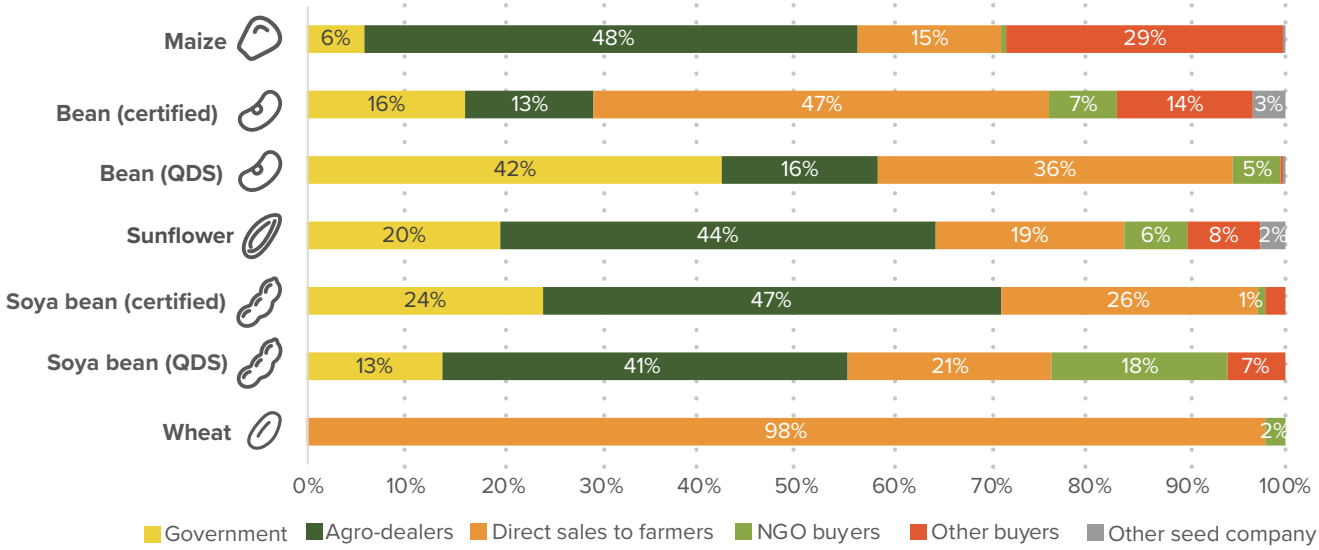
SEED SALES TO DIFFERENT CATEGORIES OF BUYERS

The TASAI Zambia study tracked sales to six categories of buyers of certified and QDS seed in 2025: government, agro-dealers, farmers (through direct sales), NGOs, other seed companies, and other buyers. Seed producers mostly sell their seed through agro-dealers and/or directly to farmers (Figure 4). For the five crops, the combined share of sales through agro-dealers and direct farmer sales ranges from 52% (bean QDS) to 98% (wheat). Wheat is the clear outlier: 98% of wheat seed is sold directly to farmers, reflecting that most wheat producers are large-scale farmers supplied directly by seed companies. Among the other four crops, the leading channel differs: agro-dealers account for the largest share of sales for maize (48%), sunflower (44%), and certified soya bean (47%). For bean, direct sales to farmers lead for certified seed (47%).



Some agro-dealer sales may occur under the subsidy program, since subsidized seed is channeled through registered agro-dealers. Government is a secondary buyer of bean, sunflower, and soya bean seed (including QDS), accounting for 26%, 20%, and 22% of sales respectively when certified and QDS seed are combined — though it is not the leading buyer for any of the three: agro-dealers outsell government for sunflower and soya bean, and direct farmer sales outsell government for bean. The exception is bean QDS, where government is the largest single buyer (42% of sales). Maize also stands out for a substantial 29% share of sales going to “other buyers”; most of this volume was reported by companies as export sales, a channel that TASAI does not normally track as a buyer category. NGOs purchase modest amounts of seed across all five crops (0.4%–6.3% of sales when certified and QDS seed are combined), although their share is higher in some classes, such as soya bean QDS (18%) and certified bean (7%). NGO buyers include SNV, COMACO, Catholic Relief Services, Action Against Hunger, the Food and Agricultural Organization of the United Nations (FAO), and World Food Programmme.

Figure 4: Sales to different categories of buyers



Note: Soya bean (QDS) "Other buyers" includes 30 MT of sales for which the buyer category was not specified.

SEED IMPORT AND EXPORT PROCESS

Efficient seed import and export processes extend the seed market beyond national borders. While seed companies benefit from an expanded market, farmers can access a wider range of varieties from across the region. The length of the import process in days is measured as the sum of the number of days used to obtain import documentation (import permit, phytosanitary certificates, and an Orange International Seed Lot Certificate (OIC),[16] if applicable) and the number of days to clear seed at the border. It excludes transportation time. Volumes, numbers of transactions, and source and destination countries are from SCCI records; satisfaction ratings and company-reported processing times come from the TASAI survey.

Seed importation

Seed imports in Zambia are regulated by the Ministry of Agriculture. To import seed, a company or individual must first register with SCCI as a seed importer and obtain a Seed Importer's License. The applicant must then apply for a Notice to Import Seed from SCCI, followed by a Plant Import Permit from the Department of Plant Quarantine and Phytosanitary Service (PQPS). The final step is to obtain an Import Permit from the Department of Agribusiness and Marketing in the Ministry of Agriculture. All applications are submitted online — most through the Zambia Electronic Single Window, operated by the Zambia Revenue Authority. The exception is the Seed Importer's License, which is obtained through the Government Service Bus (GSB), the government's online service delivery platform.

After submission, the relevant departments review the application for completeness. Once approved, invoices are issued online and payment is made through the bank. After proof of payment is submitted to the Department of Agribusiness, the import documents are issued online. On entry into Zambia, the seed must be accompanied by a phytosanitary certificate from the exporting country and, where applicable, an Orange International Seed Lot Certificate (OIC) and a Genetically Modified Organisms (GMO) certificate. Seed import data is from SCCI, which receives data from the Zambia Revenue Authority through the online verification system Government Service Bus (GSB).

Table 15 shows the volume of seed imports and the source countries in 2024/25 using data from SCCI. Of the five crops, maize accounted for 678 of the 969 recorded import transactions (70%) and approximately 99% of total import volume (34,078 MT). The remaining four crops together represented 30% of transactions but just over 1% of volume: bean (123 transactions, 274 MT), wheat (70 transactions, 117 MT), soya bean (66 transactions, 5.5 MT), and sunflower (32 transactions, 0.28 MT). According to SCCI, the seed imports include (i) seed in transit from South Africa or Zimbabwe to another country, (ii) material being imported for research purposes, and (iii) basic seed being imported for multiplication in Zambia.

16 The Orange International Seed Lot Certificate (OIC) is issued by a laboratory accredited by the International Seed Testing Association when both sampling from the seed lot and testing of the sample are carried out by the same laboratory.

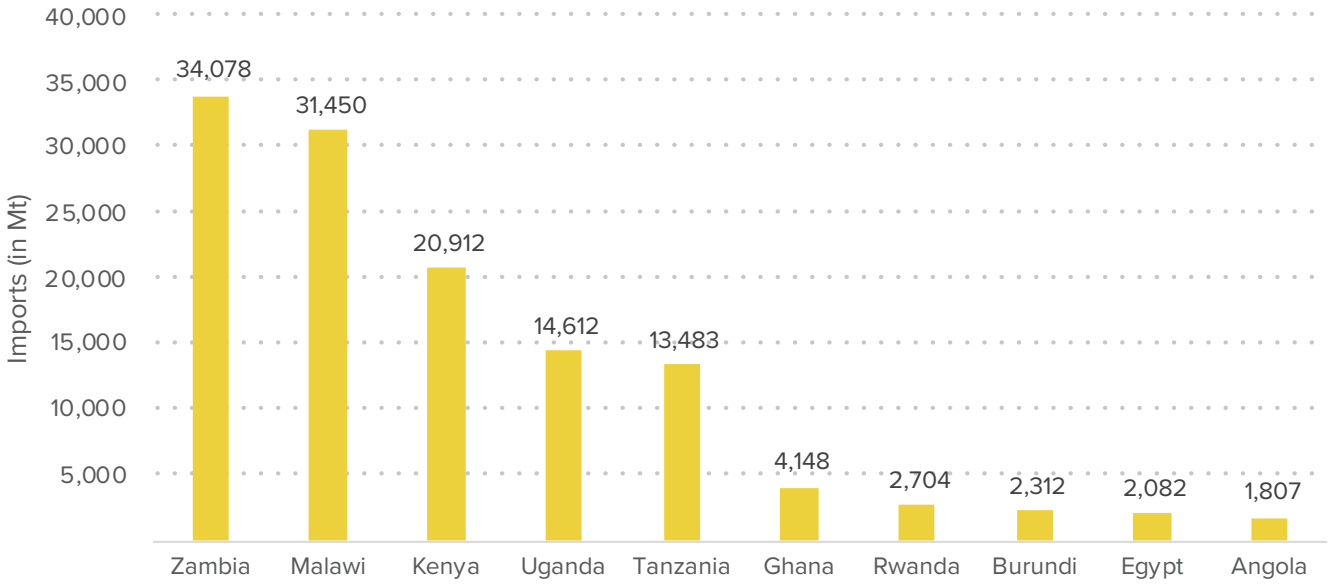
Table 15: Seed importation (2024/25)

Crop	Total number of import transactions	Seed imports in 2024/25 (in MT)	Source countries
Maize	678	34,078[17]	Democratic Republic of Congo, India, Kenya, Malawi, Mexico, Nigeria, Peru, South Africa, Tanzania, Thailand, United States of America, Zimbabwe
Bean	123	274	China, Democratic Republic of Congo, Kenya, Netherlands, South Africa, Tanzania, Zimbabwe
Sunflower	32	0.28	India, Malawi, South Africa, Turkey
Soya bean	66	5.50	Democratic Republic of Congo, Malawi, United States of America, Zimbabwe
Wheat	70	117	Kenya, Mexico, South Africa, Zimbabwe
Total	**969**	**34,475**	

Figure 5 shows the leading maize-seed-importing countries in Africa in 2024 (AUC, TASAI, and AGRA, forthcoming). Zambia is Africa's largest maize seed importer, followed by Malawi. The top five importers — and nine of the top ten — are in the COMESA/SADC region, reflecting maize's importance as a staple crop across the region. Figure 6 shows the duration of the seed import process as estimated by SCCI and reported by seed companies. SCCI estimated the total process at seven days; companies reported a longer average of nine days, with import documentation taking seven days against SCCI's five-day estimate. Seed companies rated the process "excellent" at 88%.

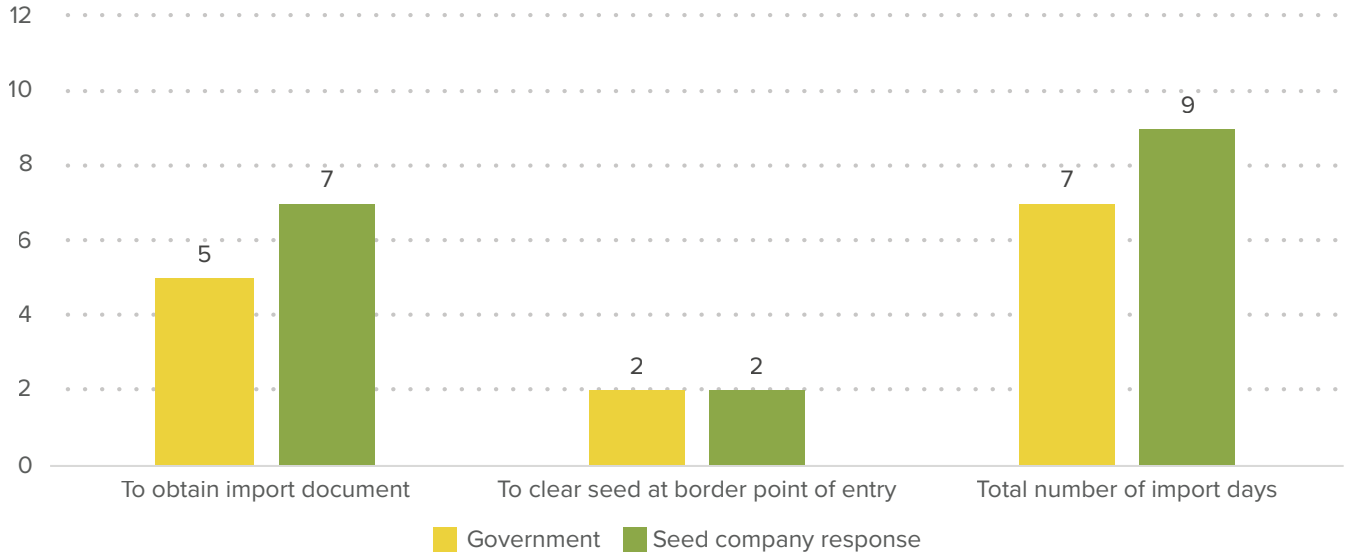
17 The volume of maize seed imports recorded by SCCI (34,078 MT) far exceeds the 2,930 MT that surveyed companies reported importing themselves, suggesting that some imported maize seed volume is not captured in company-level reporting. For bean, soya bean, and wheat, surveyed companies reported no imports, while SCCI recorded 274, 5.5, and 117 MT respectively. For sunflower, surveyed companies reported 0.03 MT against SCCI's 0.28 MT.

Figure 5: Leading maize seed importing countries in Africa (2024)[18]



18 Data for Zambia is from the 2024/25 marketing season. The rest of the data come from the ASSPI 2025 Status Report and TASAI Country Studies conducted between 2025 and 2026

Figure 6: Duration of the seed import process



Seed exportation

To export seed from Zambia, a company or individual must comply with the relevant regulatory requirements. The applicant must first obtain the seed analysis certificate required by the importing country — usually an Orange International Seed Lot Certificate (OIC) issued by SCCI — as well as the import permit from the destination country, which PQPS uses to issue a phytosanitary certificate. Applications are submitted online through the Zambia Electronic Single Window. Once the required fees are paid, the Ministry of Agriculture issues the export permit and phytosanitary certificate online.

Table 16 shows the number of seed exports and their destinations in the 2024/25 season. Seed companies in Zambia are major exporters of certified seed in the SADC and COMESA regions. According to SCCI, companies exported 88,381 MT of maize seed, 3,704 MT of soya bean seed, and 222 MT of wheat seed in 2024/25. SCCI recorded no exports of bean or sunflower seed that year. In total, SCCI recorded 955 export transactions, of which 86% (822) were for maize.

Seed exports went to 26 countries for maize, 15 for soya bean, and 2 for wheat. Most exports were within Africa. However, certified seed was also exported to Europe (maize to France and Germany, wheat to the United Kingdom, and soya bean to the United Kingdom), Asia (maize to India and Pakistan), and Australia (soya bean). These markets may impose additional phytosanitary and seed certification requirements, which Zambian exports are required to meet.

Table 16: Seed exportation (2024/25)

Crop	Transactions	Volume (MT)	Destination countries
Maize	822	88,381	Angola, Botswana, Burkina Faso, Burundi, Cameroon, Democratic Republic of Congo, Côte d'Ivoire, Eswatini, Ethiopia, France, Germany, Ghana, India, Kenya, Malawi, Mali, Mozambique, Namibia, Nigeria, Pakistan, Rwanda, Senegal, South Africa, Tanzania, Uganda, Zimbabwe
Soya bean	124	3,704	Angola, Australia, Botswana, Congo Brazzaville, Democratic Republic of Congo, Gabon, Côte d'Ivoire, Kenya, Malawi, Mozambique, Nigeria, South Africa, South Sudan, Tanzania, United Kingdom
Wheat	9	222	United Kingdom, Zimbabwe
Total	**955**	**92,307**	

Figure 7 shows the leading maize-seed-exporting countries in Africa in 2024 (AUC, TASAI, and AGRA, forthcoming). Zambia is Africa's largest maize seed exporter, by a very large distance, followed by South Africa. None of the other countries exported more than 5,000 MT of maize seed in 2024. The top exporting countries are all from the COMESA/SADC region.

TASAI-surveyed exporters and SCCI both estimated the duration of the export process at 10 days (Figure 8). Individual company responses ranged from 7 to 19 days. Three of the 16 surveyed exporters reported delays in obtaining export documents, including the phytosanitary certificate, the export permit, and the non-GMO certificate. Some companies also noted that grain export bans in destination countries are occasionally misapplied to seed shipments, disrupting trade. Overall, however, exporters rated the process "good" at 74%.

Figure 7: Leading maize seed exporting countries in Africa (2024)

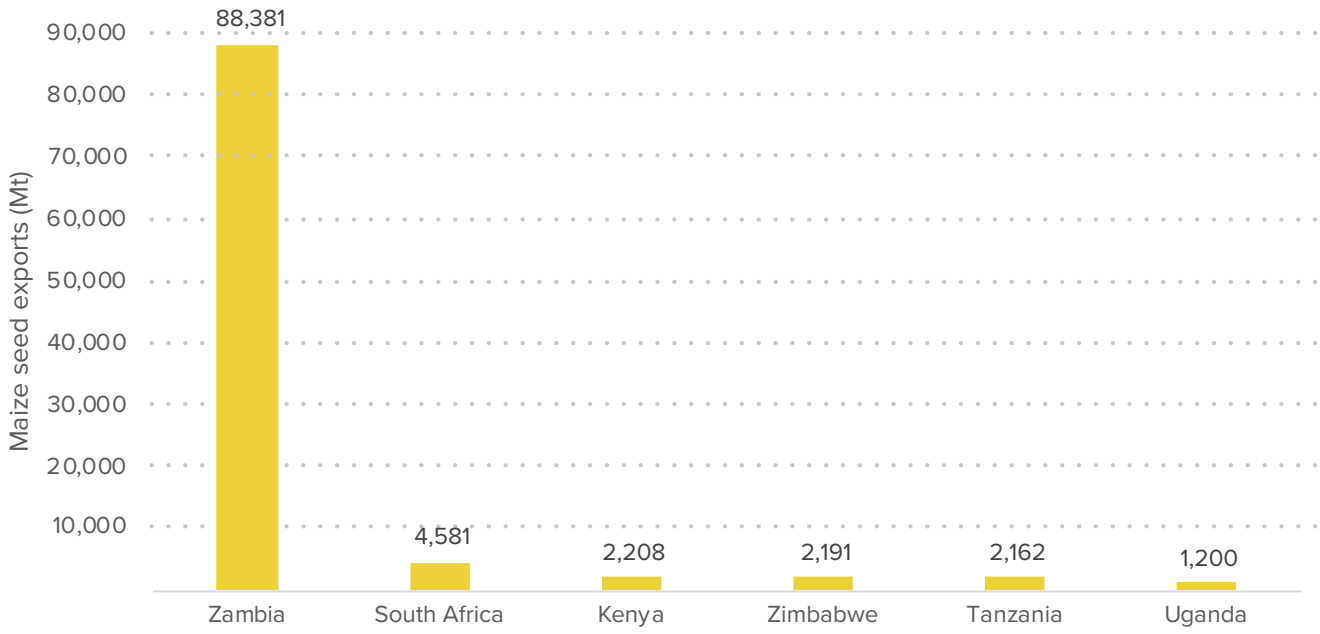
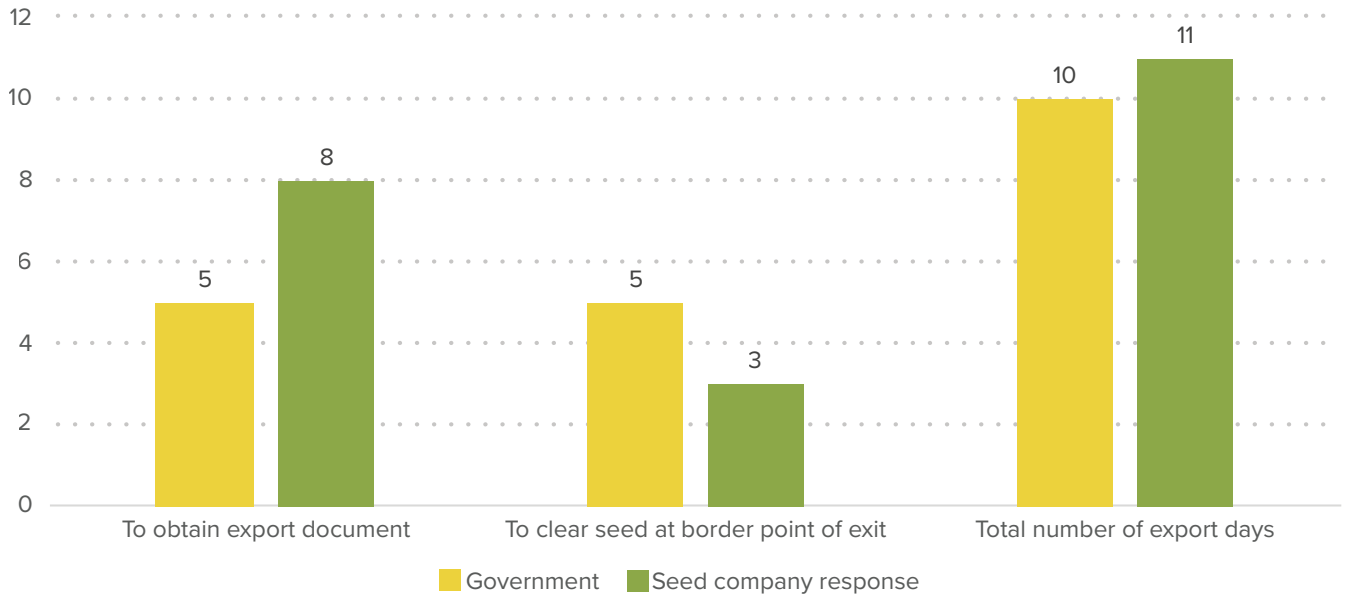


Figure 8: Duration of the seed export process (2024/25)



SEED POLICY AND REGULATIONS

THE VARIETY RELEASE PROCESS

Plant variety testing is the process by which new varieties undergo tests for Value for Cultivation and Use (VCU) and Distinctness, Uniformity and Stability (DUS). Varieties that meet the VCU and DUS standards are approved for release by the mandated authority. A vibrant seed sector requires a functional variety release system that is well understood and consistently followed by all relevant actors. Lengthy or costly variety release processes can limit the number of varieties released, with adverse effects on farmer choice.

Process of variety release

Variety release in Zambia is coordinated by the Variety Release Committee (VRC), appointed by the Minister of Agriculture under the mandate of the Plant Variety and Seeds Act (Cap. 236) (Republic of Zambia 1967). The first step in the process is to apply to the VRC for the variety to be pre-released. Pre-release means that the variety is registered and can undergo the required VCU and DUS tests. The application is submitted to SCCI, which is the secretariat of the VRC. This pre-release application is accompanied by seed samples of the variety to be tested for two growing seasons.

The National Variety Release Trials assess the VCU of new varieties — their agricultural performance and value for industrial or domestic use. For general release, the tests are conducted at six sites in the three agro-ecological regions across the country, for a minimum of two growing seasons. The minimum testing period for DUS tests is two growing seasons at a single site.

On successful completion of the tests, the applicant applies for variety release. The application is submitted at least one month before the VRC meeting. SCCI prepares and submits the results from the two tests to the VRC. The Committee makes decisions based on the performance of the candidate variety compared to varieties already on the market. During the VRC meeting, applicants are invited to present the merits of their variety.

Length and satisfaction with the variety release process

The average length of the variety release process, as reported by seed companies and breeders, was similar: 23 months (seed companies) and 25 months (breeders) (Table 17). The mode was 24 months. Both groups were broadly satisfied: seed companies rated the process "excellent" at 84% and breeders rated it "good" at 70%. Despite this generally positive assessment, one respondent highlighted a challenge: a public wheat breeder rated the process at 30%, noting that there are too few breeders for the workload; the same breeder cited high fees for breeding and releasing varieties as a constraint.

Table 17: Length and satisfaction with variety release process (2025)

Indicators	Seed companies' responses	Breeders' responses[19]
Length of variety release process (in months)	23 (n=12)	25 (n=4)
Satisfaction with variety release process (out of 100%)	84% (n=13)	70% (n=4)

extremely poor | poor | fair | good | excellent

Cost of the variety release process

In well-functioning seed systems, the costs of releasing a variety should not deter applicants from seeking variety release. The official costs of variety release include USD 20 per application for pre-release (registration for testing), USD 150 for the VCU tests per variety per site per year, and USD 150 for the DUS tests per variety per site per year (Table 18) (Government of Zambia 2018). A separate USD 20 fee is paid when the applicant submits the variety release application to the VRC after testing. Applicants also pay for two seasons of DUS testing and two seasons of VCU testing. VCU trials involve six tests per season, with two tests conducted in each of the three agro-ecological regions. Overall, the cost of variety release in Zambia is ZMW 50,076, comprising DUS fees (ZMW 7,020), VCU fees (ZMW 42,120), and other costs (ZMW 936).

19 Breeders' responses draw on a small sample

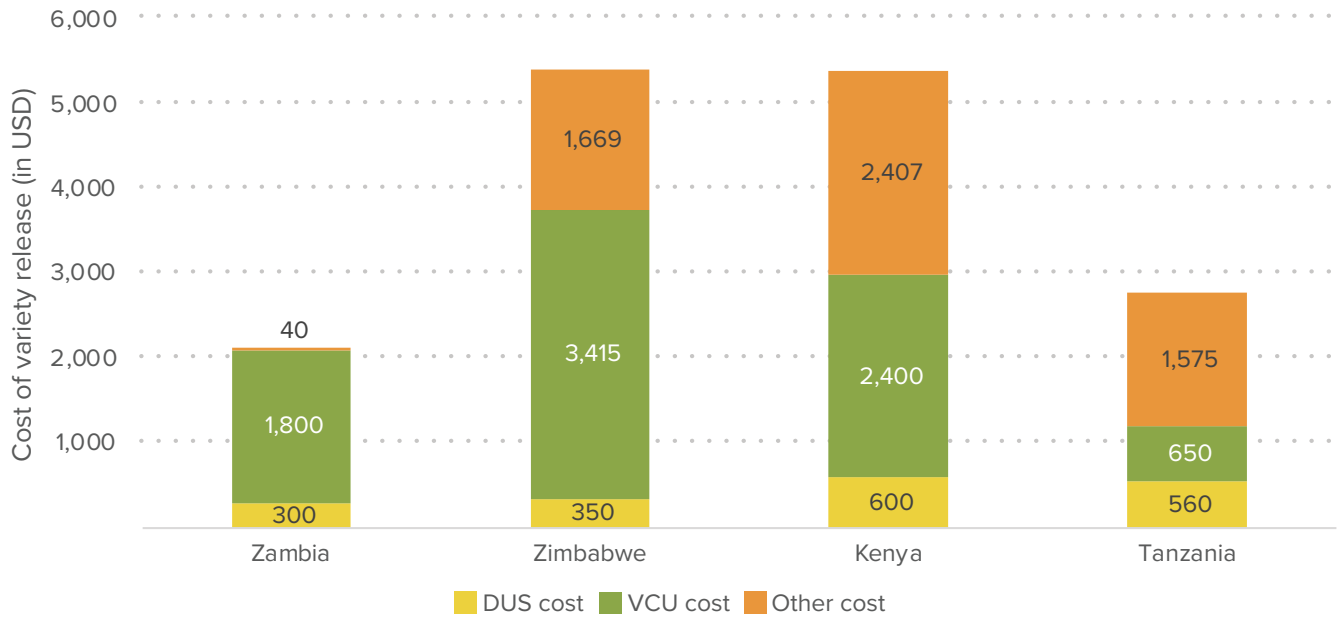
Figure 9 shows the comparative cost of variety release across three other African countries with seed systems at a similar stage of development: Kenya (USD 5,407), Tanzania (USD 2,785), and Zimbabwe (USD 5,434). The cost of variety release in Zambia (USD 2,140) is the lowest of the four countries compared. In all four countries, DUS testing costs are lower than VCU testing costs because VCU tests are conducted multiple times and in multiple locations. In Zambia, Kenya, and Tanzania, DUS and VCU fees follow a fixed fee schedule; in Zimbabwe, VCU testing is managed by the breeder and costs may vary. Other cost components are generally not standardized and may vary widely across the four countries.

Table 18: Cost of variety release

Variety release costs	Official fees per variety/ year/site (USD)	Total cost of variety release (USD)[20]	Total cost of variety release (ZMW)
Cost of DUS trials	150	300	7,020
Cost of VCU trials	150	1,800	42,120
Other costs (pre-release and variety release fees)	20	40	936
Total		**2,140**	**50,076**

20 Exchange rate (31 March 2026): USD 1 = ZMW 23.4

Figure 9: Comparative costs of variety release across selected African countries



STATUS AND IMPLEMENTATION OF NATIONAL SEED POLICY FRAMEWORK

Well-functioning formal seed sectors depend on effective coordinating institutions operating within clearly defined, regularly updated legal frameworks that provide the structural foundation for the sector. Table 19 lists the key seed policy instruments in Zambia and details their current status and implementation.

Table 19: Key seed policy instruments in Zambia

Instrument	Description	Implementation Status
National instruments		
Plant Variety and Seeds Act (Cap. 236) (Republic of Zambia 1967)	The principal seed legislation in Zambia. The law designates the Seed Control and Certification Institute (SCCI) as the certifying authority and assigns it key seed sector roles, including the registration and licensing of seed actors, seed sampling, seed testing, and seed inspection.	The law is fully implemented. SCCI serves as the certifying authority and performs all functions assigned to it under the law.
Plant Variety and Seeds Regulations 2018 (Government of Zambia 2018)	These regulations implement the Seed Act and outline its detailed implementation arrangements. They also address variety release procedures, assign the Minister responsibility for appointing the Variety Release Committee (VRC), and include seven Schedules covering forms, fees, seed schemes, and seed standards.	SCCI fully implements the Regulations. The Plant Variety and Seeds (Amendment) Regulations 2021 is the most recent amendment to the Regulations. This amendment updates the Seventh Schedule, which prescribes fees for seed services, including registration as a seed grower, licensing for seed sellers and other players, seed testing, variety testing, variety registration, and other miscellaneous tests.
Plant Health Act, No. 1 of 2025 (Republic of Zambia 2025)	An Act that provides for the protection of plant resources and establishes the Plant Quarantine and Phytosanitary Service (PQPS) as a department. It provides for the registration of pest controllers and plant-related structures, and for the regulation of imports and exports to prevent the introduction and spread of pests. It implements the International Plant Protection Convention established in 1952.	Although PQPS is implementing the Act, the accompanying regulations have not yet been formulated.
Plant Breeders Rights Act (No. 18 of 2007) and its Regulations (SI No. 46 of 2011)	The Act that provides a framework for the protection of plant breeders' rights, as well as related denomination of plant varieties. The Act designates the Seed Control and Certification Institute (SCCI) as the plant variety protection authority and aims at promoting the development of new plant varieties.	SCCI implements the Act and Regulations.
Regional regulatory instruments		
COMESA Seed Trade Harmonization Regulations (COMESA 2014)	The COMESA Regulations address variety release, seed certification, and phytosanitary measures.	SCCI is implementing the COMESA Regulations. COMESA has also introduced export seed labels and plans to pilot them in 2026.
SADC Harmonized Seed Regulatory System (HSRS)	The Memorandum of Understanding seeks to reduce seed trade barriers. It aims to harmonize seed policies and regulations among all SADC member states to facilitate seed trade and improve seed availability.	Zambia has signed the Memorandum of Understanding for the SADC HSRS and is implementing the framework. Seven varieties in the Zambia Variety List are from the SADC Catalogue.

EFFORTS TO ERADICATE COUNTERFEIT SEED

Counterfeit seed threatens the seed sector in two important ways: first, it erodes farmers' confidence in certified seed when they unknowingly plant inferior-quality planting material labelled as certified; and second, it undermines efforts to increase the adoption of improved varieties. TASAI tracks the number of counterfeit seed cases reported by seed companies and the government in the data collection year. In Zambia, SCCI further distinguishes counterfeit seed from illegal seed as a separate category, and this report presents data on both. In addition, seed companies report their satisfaction with government efforts to eliminate counterfeit seed.

SCCI is the agency responsible for addressing both categories. Counterfeit seed refers to seed sold without going through the certification process. It includes colored grain sold as seed, ungraded seed, seed sold in counterfeit packaging, and seed sold with counterfeit or no labels. Counterfeit seed has been documented across major agricultural production areas, including Central, Southern, Eastern, Copperbelt, and Lusaka provinces. Cases peak during the seed marketing season and predominantly affect leading commercial seed brands.

In contrast, illegal seed trade involves certified seed that is sold in contravention of the Plant Variety and Seeds Act (Cap. 236). This includes seed sellers operating without a license, the sale of expired seed, and the repackaging of certified seed without authorization from SCCI. Table 20 shows the volume of counterfeit and illegal seed recorded by SCCI during the 2024/25 marketing season. The table presents two estimates of counterfeit seed prevalence: one calculated from SCCI's recorded volumes, and one based on seed companies' own estimates. According to SCCI, 36 cases of counterfeit seed were reported during the period, and a total of 24,023 MT of counterfeit or illegal seed was confiscated. In all cases, the seed has been confiscated and is awaiting destruction pending resolution by the police and the courts. Counterfeit seed is substantially more prevalent than illegal seed: 97.2% of the confiscated volume was counterfeit.

All confiscated counterfeit seed was maize; the only illegal seed cases involved soya bean (150 MT) and sunflower (525 MT). These volumes account for 12%, 14%, and 1% of the total seed on the market for maize, sunflower, and soya bean, respectively. SCCI did not record any cases of counterfeit/ illegal seed for wheat or bean. In contrast, seed companies' estimates of counterfeit seed prevalence are substantially higher than SCCI figures for most crops.

Article 83 of the Plant Variety and Seeds Act (Cap. 236) prescribes a penalty of imprisonment for a period not exceeding three months or payment of a fine or both, for first offenders. For subsequent offences, the penalty is imprisonment for a period not exceeding six months or payment of a fine or both. SCCI has also implemented four additional measures to address counterfeit seed: (i) licensing private seed inspectors from seed companies to complement SCCI's inspection capacity; (ii) tightening the seed package labelling system by restricting label production and acquisition to SCCI; (iii) conducting joint inspections by seed companies and SCCI staff in collaboration with the Zambia Seed Trade Association (ZASTA); and (iv) introducing an online Government Service Bus (GSB) platform to reduce the cost of doing seed business, support the registration of seed sellers, and enable verification of seller credentials during field inspections. Seed companies rated government efforts as "good", with an overall satisfaction score of 63%.

While SCCI only recorded 36 cases of counterfeit seed, seed companies reported 100 cases (Table 21). Of these, 86 were reported by just three seed companies. In addition to the measures implemented by SCCI, seed companies also implement a range of measures to address counterfeit seed. These include (i) using unique packaging materials or labels, some of which include a QR code, (ii) conducting farmer and seed seller awareness campaigns, and (iii) safeguarding the company's packaging materials. The higher number of cases reported by seed companies may reflect more intensive surveillance across their distribution networks, while the lower number recorded by SCCI may reflect its limited surveillance capacity, largely due to insufficient inspectors and logistical challenges.

Table 20: Estimated percentage of counterfeit/illegal seed (2025)

Crop	Volume of counterfeit/ illegal seed	Percentage of counterfeit/illegal seed	
		Percentage computed from SCCI data of volume of counterfeit/illegal seed	Seed company estimate
Maize	23,348	12%	14%
Bean	-	0%	19%
Sunflower	525	14%	23%
Soya bean	150	1%	17%
Wheat	-	0%	9%

Table 21: Industry satisfaction with the government's effort to address counterfeit seed

Indicators	2024/25
Number of cases of counterfeit seed (seed producers)	100
Number of cases of counterfeit seed (government)	36
Seed industry satisfaction with government effort to address counterfeit seed (out of 100%)	63%

extremely poor | poor | fair | good | excellent

USE OF GOVERNMENT SUBSIDIES

Seed subsidies are intended as a short-term or medium-term measure to encourage farmers to adopt improved crop varieties. The design and execution of subsidy programs — scale, targeting, distribution arrangements, and payment systems — may either support market development or distort market incentives.

The Ministry of Agriculture launched the Fertilizer Support Programme in 2002 and renamed it the Farmer Input Support Programme (FISP) in 2009. Its main aim is to improve small-scale farmers' access to agricultural inputs at reduced cost. Although FISP is implemented in all ten provinces, studies that evaluated the program have reported that its reach remains limited (Malama and Mudenda 2025).

FISP has largely been implemented through the Direct Input Supply (DIS) arrangement, under which the government procures inputs and delivers them to districts. The process begins with the selection of input suppliers (including seed producers) and warehouse managers. Selected suppliers are contracted to deliver inputs to designated district warehouses, while suppliers and warehouse managers share responsibility for managing the inputs until collection. To improve efficiency and transparency, all information is managed through the Ministry's Zambia Integrated Agricultural Management Information System, which allows the Ministry to track the volume of seed supplied to each warehouse.

The Ministry piloted the FISP e-voucher system in 2016/17. In 2023/24, it was used in two provinces, while the other eight continued under the DIS arrangement. FISP fully transitioned to the e-voucher system in 2024/25.

Under the e-voucher system, the private sector is fully responsible for supplying agricultural inputs through their agro-dealer distribution or seed outlets, while the government provides oversight. Seed companies must first register as seed suppliers to serve FISP beneficiaries. They then supply seed through contracted agro-dealers or their own registered outlets. Agro-dealers may also buy directly from seed suppliers without contracts. Farmers redeem their e-vouchers at registered agro-dealers to obtain seed.

In the 2024/25 seed marketing season, 18 of the surveyed 39 seed producers supplied seed to the FISP program. Seed producers are relatively satisfied with FISP's administrative arrangements, rating transparency and openness at 72% and predictability at 70% (Table 22). These ratings reflect the fact that the online procurement processes, including supply tenders, are working well. Satisfaction with payment efficiency was lower, at 53%, rated "fair" (Table 22). Nine producers cited delayed government payments as a concern.

Table 22: Rating of the FISP procurement (2025)

Aspect of seed procurement process	Rating (out of 100%)
Transparency and openness of the procurement process	72%
Predictability of the procurement process	70%
Efficiency of the payment process	53%

extremely poor | poor | fair | good | excellent





INSTITUTIONAL SUPPORT

ZAMBIA'S NATIONAL SEED TRADE ASSOCIATION

Well-functioning national seed trade associations play a key role in representing industry interests and engaging with government. Their membership typically includes seed companies, seed growers, seed cooperatives, seed associations, individual seed producers, and, at times, agro-dealers.

Overview of the Zambia Seed Trade Association (ZASTA)

The Zambia Seed Trade Association (ZASTA) is the country's national association for the seed industry. ZASTA was formed on 11 November 1999 as a registered entity under the Societies Act (Cap. 119) with the mandate to promote and safeguard the interests of its members and of the seed industry. The association has 33 members, of whom 27 are full members and six are associate members. ZASTA is governed by a seven-member Executive Committee, which meets quarterly. Its secretariat, led by the Executive Secretary, manages day-to-day operations with support from a technical officer, an office administrator, and an accountant. Since 2023, ZASTA has held an Annual Seed Congress, which serves as a platform for industry updates, discussion of emerging challenges, and public-private dialogue. ZASTA is also an active member of the Africa Seed Trade Association (AFSTA).

Over the last three years, ZASTA has made three notable achievements: (i) establishing a multi-stakeholder platform on counterfeit seed that brings together public and private sector players to coordinate action, including surveillance and enforcement operations across multiple provinces, disruption of counterfeit seed trade networks, confiscation of counterfeit seed and initiation of prosecutions, and awareness-raising among farmers and seed sellers; (ii) institutionalizing a code of ethics for ZASTA members since 2024, requiring members to adhere to sound business practices and professional conduct; and (iii) improving the financial discipline of ZASTA members and agro-dealers in response to a high rate of payment default by agro-dealers, including linking members and agro-dealers to the Credit Reference Bureau to improve their creditworthiness and credit risk management.

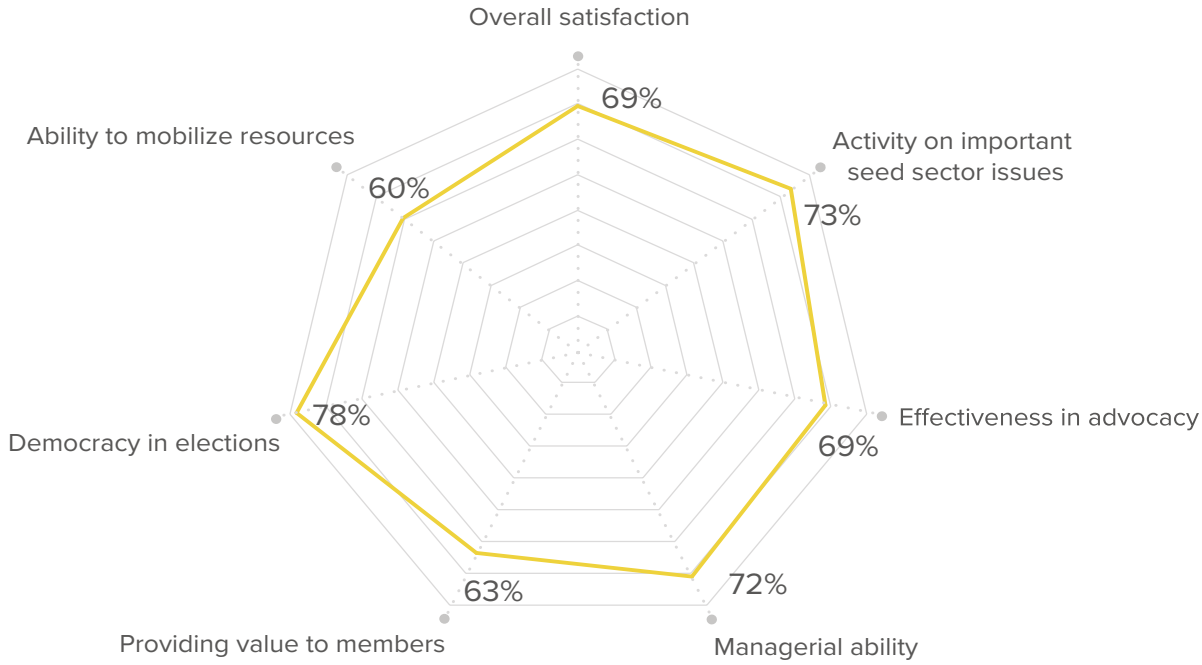
As the platform for the private sector in the seed industry in Zambia, ZASTA has identified the following priorities: (i) upholding the integrity of the seed industry and ensuring farmers have access to good-quality seed; (ii) addressing the challenge of counterfeit seed on the Zambian market; (iii) expanding access to seed export markets; (iv) consolidating the country's position as a seed production hub in Africa and beyond; and (v) developing and commercializing resilient and climate-smart varieties.

Members' satisfaction with ZASTA

Twenty-two of the 39 seed producers surveyed were ZASTA members. Figure 10 shows members' satisfaction with ZASTA of its members who responded, including one key informant, across six service areas: activity on important seed sector issues, effectiveness in advocacy, managerial ability, value provided to members, democracy in elections and decision-making, and ability to mobilize resources. Overall, members rated ZASTA "good" at 69%. Ratings were highest for democracy in elections (78%), activity on important seed sector issues (73%), and managerial ability (72%), followed by effectiveness in advocacy (69%) and value provided to members (63%). The lowest rating, at 60%, was for ZASTA's ability to mobilize resources.

Seventeen of the 39 surveyed entities (44%) were not ZASTA members: 12 seed companies, two seed cooperatives/ growers' associations, two NGOs, and one research institution. The most frequently cited reasons for non-membership were high subscription fees and limited awareness of ZASTA, each reported by four producers.

Figure 10: Member satisfaction with ZASTA



ADEQUACY OF SEED INSPECTORS

Seed inspection services ensure that certified commercial seed meets the regulatory quality standards. Providing adequate inspection services requires sufficient numbers of well-resourced inspectors. TASAI studies track the number of inspectors and additional indicators of inspector effectiveness, such as the availability of resources and the use of new digital tools.

The Seed Control and Certification Institute (SCCI) is the seed certification authority for Zambia and is mandated to handle seed inspection services. As stipulated in Articles 13, 14, 15, and 16 of the Regulations, anyone intending to conduct seed inspection, sampling, or testing must apply to SCCI for a license, undergo training, and pay the requisite fees; a license is issued once all requirements are met. Inspectors, samplers, and analysts must be attached to an organization or company. Licenses are valid for 12 months, and SCCI may terminate a license if the holder's performance is unsatisfactory.

SCCI licenses both public (official) and private seed inspectors. In 2025, there were 119 licensed seed inspectors in total, of whom 77% (92) were private inspectors (Table 23). Nineteen of the 39 surveyed entities (49%) had private seed inspectors.

Overall, seed companies rated government seed inspection services as "good", with a satisfaction score of 72%. Several seed companies praised the efficiency and professionalism of SCCI inspectors. Despite this high overall rating, eight seed companies rated government inspectors below 50%. Further, 12 seed companies noted that the number of SCCI inspectors is inadequate to inspect all the registered seed growers in a timely manner. Three companies noted that the Eastern Province is served by only one SCCI inspector.

Table 23: Number of seed inspectors and industry rating of public seed inspection (2025)

Indicators	Number of seed inspectors		
	Male	Female	Total
Number of public (official) seed inspectors	20	7	27
Number of private (licensed) inspectors	72	20	92
Total number of seed inspectors	92	27	119
Seed industry satisfaction with public seed inspection (out of 100%)			72%

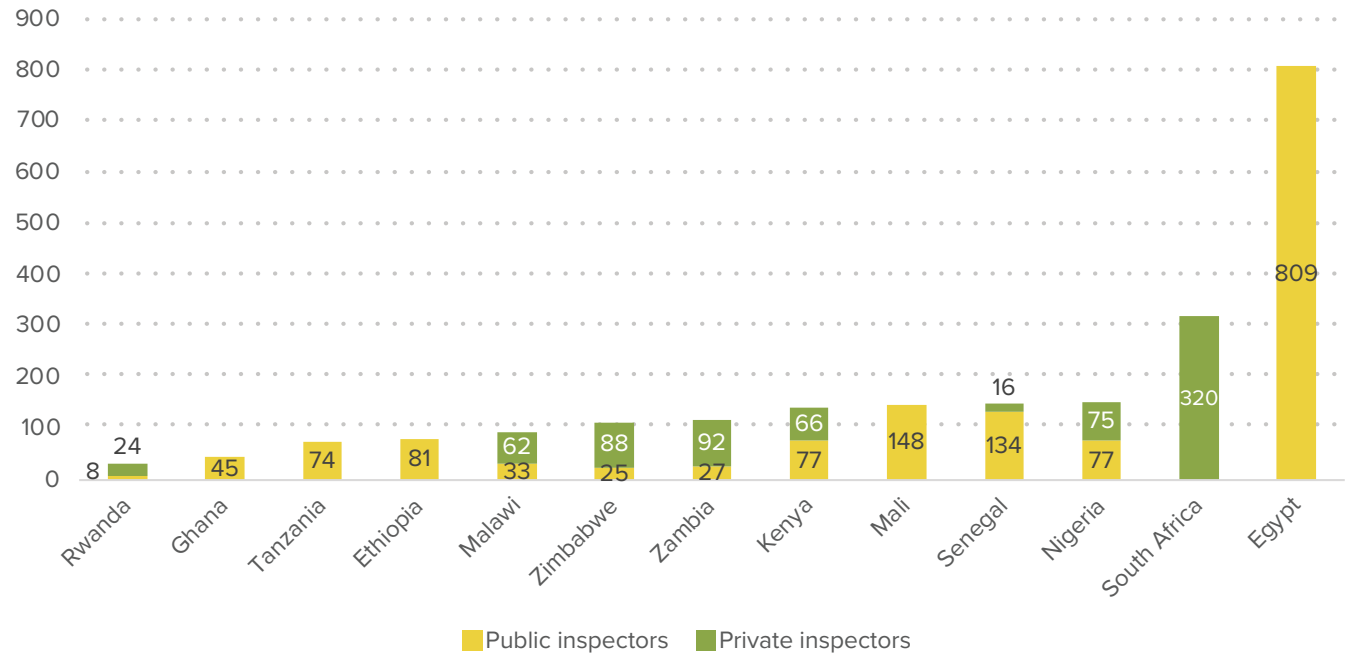
extremely poor | poor | fair | good | excellent

SCCI regularly offers seed quality control training in seed inspection, sampling, and testing. The training combines a three-month online component, delivered through SCCI's Learning Management System, with a one-week in-person practical session and final examination. It is open to participants from the public and private sectors as well as from other African countries. Successful trainees receive certificates and are licensed as seed inspectors or seed analysts. The fee is ZMW 17,500 (USD 748) for Zambians and USD 1,500 for foreign participants.

Figure 11 compares the numbers of public and private inspectors in selected African countries. Zambia is among the countries that operate both public and private inspection systems; Kenya, South Africa, and Zimbabwe have similarly well-established private inspection systems, while in countries such as Senegal, Malawi, and Rwanda, these arrangements remain at an early stage of development.

In terms of total inspector numbers, Zambia is among the African countries with more than 100 seed inspectors. Other countries at this level include Egypt, South Africa, Nigeria, Senegal, Mali, Kenya, and Zimbabwe. Egypt has the highest number of seed inspectors among the countries shown, though all are public officers.

Figure 11: Number of seed inspectors in selected African countries



SERVICE TO SMALLHOLDER FARMERS

ADEQUACY OF EXTENSION SERVICES

Well-functioning agricultural extension services are critical to the successful adoption of improved seeds by smallholder farmers. TASAI tracks the average number of agricultural households served by one extension officer. A lower ratio indicates better farmer access to expert information and advice on improved seeds and other agricultural technologies. This indicator tracks extension officers by sector (public and private) and gender and is not crop-specific.

The Department of Agriculture under the Ministry of Agriculture is the government entity responsible for agricultural extension and advisory services in Zambia. The Department currently employs 2,722 agricultural extension officers, of whom 1,776 (65%) are male. In addition to the government extension officers, seed producers employ 4,741 private extension officers, the majority of whom (60%) are female (Table 24).

According to the Ministry, extension staffing remains inadequate, with one extension officer serving approximately 1,700 farmers compared with the FAO-recommended maximum of 400 farmers per officer. The current caseload is therefore more than four times the recommended level. Seed company satisfaction with the agricultural extension service was rated "fair" at 57%; while this reflects moderate overall satisfaction, 30% of seed producers rated the service at 40% or below. The two most frequently cited complaints, each reported by approximately 30% of respondents, were insufficient numbers of extension officers and inadequate transport for farm visits.

To improve farmer access to agricultural extension services, the Ministry has divided the country into 489 agricultural blocks. These are subdivided into 3,200 agricultural camps. The Ministry's intention is to allocate extension officers to each agricultural camp, to be accessible to farmers within the camp area. The Ministry also intends to construct houses in each camp and block. By April 2026, there were 122 agricultural block houses and 821 agricultural camp houses, representing 25% coverage of blocks and 26% of camps, respectively. As this initiative is still in its early stages, its impact is not yet reflected in the satisfaction ratings reported above. The Department of Agriculture has supplied various tools and equipment for extension officers to carry out their duties, including 1,523 motorcycles and extension kits containing terrain ropes and soil-testing tools such as pH meters and moisture meters.

The Department is using ICT tools to strengthen extension services. It has distributed 1,553 tablets to extension officers and portable soil nutrient detectors to districts. It is also working with the Zambia Meteorological Department to provide farmers with early warning and weather advisory services.

Table 24: Number and adequacy of agricultural extension services

Indicators	2026	
Number of public extension officers employed by the government	Male	1,776
	Female	946
	Total	2,722
Number of private extension officers employed by seed producers	Male	1,903
	Female	2,838
	Total	4,741
Seed industry satisfaction with public extension officers (out of 100%)		57%

extremely poor | poor | fair | good | excellent

CONCENTRATION OF THE AGRO-DEALER NETWORK

Agro-dealers play a key role in expanding the reach of seed distribution systems by connecting seed companies to individual farmers, especially in hard-to-reach rural areas, and are often the main point of sale for certified seed. A denser agro-dealer network means greater access to improved seed for smallholder farmers. TASAI tracks the number of agro-dealers (also referred to as "seed sellers") and, where possible, distinguishes between registered and non-registered agro-dealers.

All seed sellers are licensed by SCCI under the Plant Variety and Seeds Act (Cap. 236). Part V of the law defines the categories of seed sellers and the modalities for their licensing, and SCCI registers seed sellers accordingly. To be eligible to operate, the seed seller must have a tax clearance certificate, proof of a physical address, a national identity card, and a certificate of incorporation.[21] Once these requirements are met, the applicant submits an application on the online government platform and then pays the necessary fees. SCCI inspects the applicant's facilities to confirm their suitability before issuing the license.

According to SCCI, there were 2,862 licensed seed sellers in 2025 (Table 25). One company worked with over 2,000

21 This requirement applies to entities such as companies, churches or societies

seed sellers. Excluding this outlier, seed companies worked with an average of 89 seed sellers each.[22] Only four other companies worked with more than 150 seed sellers. Seed companies noted, however, that agro-dealers are predominantly concentrated in urban areas, leaving most rural areas underserved.

Table 25: Number of agro-dealers and satisfaction with the agro-dealer network

Indicator	2025
Number of agro-dealers registered by SCCI	2,862
Average number of agro-dealers per seed company	89
Seed industry satisfaction with agro-dealer network (out of 100%)	56%

extremely poor | poor | fair | good | excellent

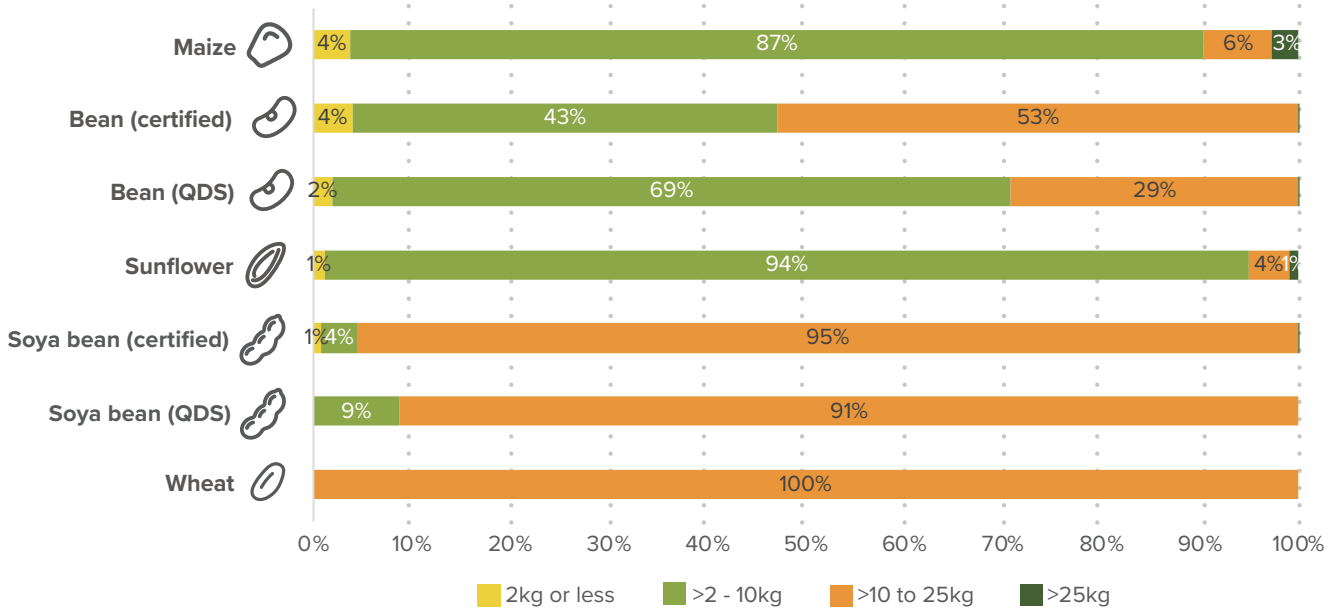
22 This section focuses on seed companies, which made up 29 of the 36 respondents to this question (28 after excluding the outlier). The remaining respondents — three NGOs, three seed cooperatives/growers' associations, and one research institution — reported averages of 14.0, 7.7, and 0 seed sellers, respectively, all well below the company average.

AVAILABILITY OF SEED IN SMALL PACKAGES

Because most farmers in Sub-Saharan Africa operate on a small scale, making seed available in smaller, more affordable packages is an effective way to increase adoption rates. TASAI tracks the percentage of seed sold in four package size categories: 2 kg and below; above 2 kg to 10 kg; above 10 kg to 25 kg; and above 25 kg.

All the wheat seed is sold in packages of between 10 kg and 25 kg (Figure 12), reflecting that wheat is grown mainly by large-scale farmers under contract who obtain seed directly from seed companies. Soya bean seed — both certified and QDS — is primarily sold in 10–25 kg packages, as it is mainly grown by commercial farmers. By contrast, sunflower and maize seed are mostly sold in packages of 10 kg or less, reflecting smaller-scale production by smallholder farmers. Bean seed shows a split by class: 53% of certified bean seed is sold in 10–25 kg packages, compared with 29% of QDS bean seed. This is driven by a small number of producers: two of the 17 producers selling certified bean account for 85% of the volume sold in these packages, and both sell mostly directly to farmers. Bean QDS seed is predominantly sold in packages of 10 kg or less.

Figure 12: Seed sales in different package sizes



AVERAGE SEED AND GRAIN PRICES

Seed and grain prices at planting time are a useful measure of the affordability of improved seed. Many smallholder farmers face a choice between purchasing certified seed and planting grain saved from the previous harvest; the greater the price difference, the less likely resource-poor farmers are to purchase certified seed. This indicator tracks the retail price of seed as reported by seed producers, compared with the market price of grain at planting time.

Table 26 compares the average price of seed reported by seed producers with the average price reported by the Ministry of Agriculture (Ministry of Agriculture 2025). The Ministry seed prices are only for maize, sunflower, and soya bean. The table also includes average grain prices sourced from the Ministry's Quarterly Market Bulletin[23]. The Bulletin does not provide prices for wheat.

23 Source: Ministry of Agriculture (2025), Quarterly Market Information Bulletin No. 010425, 31 March 2025.

Maize seed prices vary considerably across producers: hybrid seed averages approximately 55% more than OPV seed. However, this average masks the full spread within each class: hybrid maize ranges from 62 to 123 ZMW/kg and OPV from 38 to 70 ZMW/kg. The wide range in seed prices signals product differentiation between seed companies. Based on TASAI data, certified seed is priced above QDS for both bean and soya bean, though the premium varies: about 22% for bean, but only about 5% for soya bean.

At planting time, hybrid maize seed cost about nine times the price of maize grain (ZMW 88/kg compared with ZMW 9.5/kg), against about six times for OPV seed, 3.5 times for sunflower, three times for certified soya bean, and twice for certified bean seed. Ministry seed prices are broadly consistent with survey data and fall within the range reported by surveyed seed producers.

Table 26: Average seed and grain prices (2024/25)[24]

Crop	Average seed price			Average grain price	
	TASAI survey (ZMW/kg)	Ministry of Agriculture (ZMW/kg)	TASAI survey (USD/kg)[25]	Price in (ZMW/kg)	Price in (USD/kg)
Maize (hybrid)	88	67	3.75	9.5	0.41
Maize (OPV)	57		2.42		0.41
Bean (certified)	70	-	2.99	33.9	1.45
Bean (QDS)	58	-	2.46		1.45
Sunflower	49	57	2.09	13.8	0.59
Soya bean (certified)	41	38	1.73	14.2	0.61
Soya bean (QDS)	39		1.65		0.61
Wheat	51	-	2.17	-	

24 Seed prices were collected between December 2025 and March 2026, grain prices come from the Ministry of Agriculture bulletin of 31 March 2025, and the exchange rate is that of 31 March 2026; comparisons across these columns should be read with this in mind.

25 Exchange rate (31 March 2026): USD 1 = ZMW 23.4



CONCLUSIONS

This report presents the findings of TASAI's second assessment of Zambia's formal seed sector, following TASAI's 2017 Zambia brief (Mabaya et al. 2017). The study covers five focus crops — maize, bean, sunflower, soya bean, and wheat — one more than TASAI's typical four-crop scope, reflecting wheat's growing importance to the country's food and nutritional security. Findings draw on a survey of 39 of the 40 active seed producers (among 51 targeted producers) spanning seed companies, cooperatives, NGOs, and one research institution, complemented by SCCI administrative records and Ministry of Agriculture data. Women hold 35% of management positions across these seed businesses, though leadership remains concentrated among men: only 21% of surveyed entities have a female top manager, and 21% of those with available ownership data are female-owned.

Throughout this report, data availability was shaped by the seed industry's competitive dynamics: companies often treat production, sales, and variety-level data as commercially sensitive, and some reported trade volumes fell short of government records. Certified maize variety names could not be disclosed for confidentiality reasons. For some indicators, this meant the report could only show a partial view of the maize seed sector. For others, the report relied on estimation methods — including a trimmed sales-to-availability ratio for maize sales — to fill critical gaps without overstating confidence in the underlying figures.

Zambia's formal seed sector is well established, with 40 active seed producers (of 51 targeted) and a functioning SCCI-led regulatory system. It is Africa's largest maize seed producer, its largest maize seed importer, and a major regional exporter, shipping over 92,000 MT of seed to 31 countries in 2024/25. Yet performance remains uneven across crops: maize adoption is high (69%), while soya bean (36%), sunflower (17%), and bean (11%) lag well behind.

Research and variety development is largely private-sector-led, with 43 of 52 active breeders employed by seed companies. This has sustained a strong pipeline of new varieties, including 49 maize releases since 2023, 46 from the private sector. Climate adaptation is prominent, with 50 of the 69 varieties released between 2023 and 2025 carrying a climate-smart trait — the most common special feature category. Overall, 60 varieties carry at least one special feature. However, public breeding capacity remains limited, and concerns persist over infrequent public maize releases and poor genetic purity of basic seed for sunflower and soya bean. Expanding public breeding and strengthening quality assurance remain priorities.

The bean, sunflower, and soya bean markets are competitive, while the maize market sits at the lower boundary of the moderate range of concentration, with the top four companies holding 76% of estimated sales. Wheat is extremely concentrated, reflecting its small number of active producers. Zambia's maize seed exports reflect strong technical and commercial capacity, but export efficiency is still constrained by documentation delays and occasional border misclassification of seed as grain. Wide variation in maize seed prices suggests product differentiation, yet large seed-to-grain price gaps limit affordability. Counterfeit and illegal seed also remain a major concern: 24,023 MT was confiscated in 2024/25, and seed companies reported 100 counterfeit cases against SCCI's official count of 36.

The regulatory framework is well established and largely functional, anchored in the Plant Variety and Seeds Act, its 2018 Regulations, and the Plant Health Act No. 1 of 2025, though implementing regulations for the latter are still pending. The variety release system is efficient and relatively low-cost by regional standards. Zambia is also advancing implementation of the COMESA harmonized system. FISP's full transition to a private-sector-led e-voucher system by 2024/25 marks a significant structural shift, though delayed payments risk discouraging suppliers and disrupting delivery. The main weakness remains counterfeit seed: although industry rates government efforts as "good" (63%), companies reported far more cases (100) than SCCI recorded (36).

Institutional support is relatively strong, with SCCI leading certification, licensing, variety release, and inspector training, and ZASTA supporting industry coordination. Seed inspection capacity is solid, but uneven deployment — especially shortages of public inspectors — still creates service gaps. ZASTA's membership could be broadened: 17 of the 39 surveyed producers are not members.

Service to smallholder farmers remains uneven. Adoption is high for maize but much lower for soya bean, sunflower, and bean. Agro-dealers are the leading channel for maize, sunflower, and soya bean seed, yet their urban concentration leaves many rural farmers underserved. Extension services are overstretched, and affordability remains a major constraint, especially for hybrid maize.



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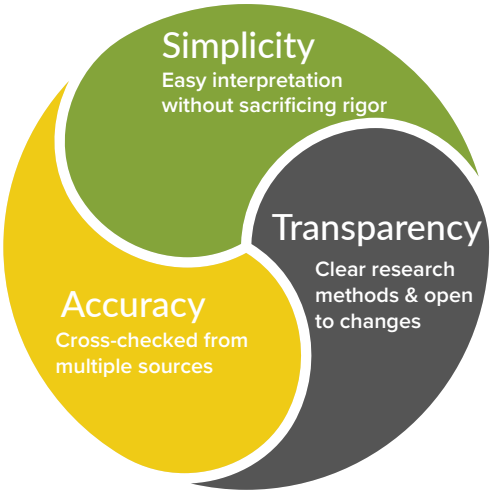
ABOUT TASAI



PILLARS OF COMPETITIVE SEED SECTORS

The African Seed Access Index (TASAI) is a seed industry research initiative that is coordinated by the nonprofit organization TASAI Inc. TASAI's goal is to encourage African governments and other seed industry players to create and maintain enabling environments that will accelerate the development of a vibrant private-sector-led seed system serving smallholder farmers. It is this enabling environment that TASAI seeks to measure, track, and compare across African countries. The intended outcome of the index is improved access to locally adapted, affordable, and high-quality seed of improved varieties by smallholder farmers in Sub-Saharan Africa.

To assess the status of the seed industry value chain, TASAI tracks indicators in the following five categories: Research and Development, Industry Competitiveness, Policy and Regulations, Institutional Support and Service to Smallholder Farmers. By the end of 2026, TASAI studies will have been completed in 24 African countries: Burkina Faso, Burundi, Cameroon, Côte d'Ivoire, the Democratic Republic of Congo, Ethiopia, Ghana, Kenya, Liberia, Madagascar, Malawi, Mali, Mozambique, Niger, Nigeria, Rwanda, Senegal, Sierra Leone, Somalia, South Africa, Tanzania, Uganda, Zambia, and Zimbabwe. In each country, TASAI works closely with local seed industry actors, government and international development agencies to share the TASAI findings and to identify the next steps for creating a vibrant national seed sector. TASAI's approach is guided by the principles of Simplicity, Transparency, and Accuracy.



TASAI PRINCIPLES

For a comparison of TASAI Indicators across different countries, please visit: https://tasai.org/products/dashboard

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