Policy Brief: Priorities for Intervention in the Seed Sector in Zambia



INTRODUCTION

Zambia's formal seed sector is one of the strongest in Sub-Saharan Africa, supported by 40 active seed producers and a well-established regulatory system. The country is Africa's largest maize seed producer and exporter, shipping over 92,000 Mt of certified seed to 31 countries in the 2024/25 marketing season. Yet performance remains uneven across crops: the adoption rate of improved seed for maize is high (69%), while the rates for bean and sunflower seed lag at 11% and 17% respectively.

TOP MAIZE EXPORTER
92,000 Mt of certified seed exported to 31 countries in 2024/25

CLIMATE-SMART VARIETIES
43 of the 49 maize varieties released in 2023–2025 are climate-smart

ADOPTION GAP
69% improved seed adoption for maize, vs. 11% for bean and 17% for sunflower

PRIORITY CROPS FOR THIS STUDY

Maize · Bean · Wheat · Soya bean · Sunflower

The regulatory framework is well established and largely functional, anchored in the Plant Variety and Seeds Act (CAP 236), its Regulations, and the Plant Health Act No. 1 of 2025. The variety release system is efficient and relatively low cost by regional standards. Zambia is also implementing the COMESA Harmonized Seed Trade Regulations (2014) and the SADC Harmonized Seed Regulatory System.

The Seed Control and Certification Institute (SCCI) is the government department in the Ministry of Agriculture responsible for seed certification and quality control. The Zambia Seed Trade Association (ZASTA) is the national seed association, which serves as the umbrella for the private sector in the seed industry. The Zambia Agriculture Research Institute (ZARI) and the University of Zambia (UNZA) are public research institutions that play key roles in research and variety development.

The TASAI Zambia Country Report was published in 2026, based on survey data collected between December 2025 and March 2026 and complemented by records from SCCI and the Ministry of Agriculture. The report provides a comprehensive assessment of the seed sector in Zambia across five categories: research and development, seed industry competitiveness, seed policy and regulations, institutional support, and service to smallholder farmers. The study focuses on five crops important for food security and household income: maize, bean, sunflower, soya bean, and wheat. This policy brief, informed by the report's findings and stakeholder feedback gathered during the July 2026 dissemination workshop, presents eleven priority areas for intervention to address the key challenges facing the seed sector in Zambia.

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PRIORITY AREAS FOR INTERVENTION

1. **Increase public funding for ZARI's breeding programs,** particularly for sunflower, wheat, and maize. As of 2025, ZARI had only one sunflower breeder, and no sunflower variety developed by a public institution has been released since 2000; as a result, the most popular sunflower varieties on the market are decades old — Milika (released in 1997) and Saona (released in 1991). ZARI's maize program faces a similar constraint: with only two breeders, its capacity to develop and release new maize varieties is limited, and just 3 of the 49 maize varieties released between 2023 and 2025 came from ZARI, with the rest supplied by the private sector. This is a significant gap, since ZARI is the main source of basic seed for sunflower (82% of sources named), soya bean (67%), and bean (64%), and only 11 of the 26 active maize seed producers report employing their own maize breeders. To close these gaps, funding to ZARI should be increased to:
   - Hire additional breeders and support staff, especially for the wheat, sunflower and maize programs
   - Establish new irrigation systems for improved capacity for production and maintenance of breeder and basic seed
   - Refurbish existing or establish new cold storage facilities to increase capacity for maintenance of all classes of early generation seed
   - Purchase laboratory equipment and consumables for seed testing
   - Conduct awareness among seed companies and farmers on newly developed ZARI varieties for wheat, maize, and soya bean
2. **Enforce the variety licensing system to improve seed producers' access to public varieties** developed by ZARI and the University of Zambia. The two research institutions have established a system for seed producers to access these varieties through licensing agreements (exclusive for ZARI maize hybrids, non-exclusive for OPVs); however, enforcement is inadequate, and many companies fail to remit royalty payments back to the institutions. In addition, several seed companies report inadequate quantities or late deliveries of basic seed. The proposal is for:
   - ZASTA, ZARI, and UNZA to review the variety licensing framework to identify why seed companies show low adherence and why the research institutions face basic seed shortfalls. The three entities should then propose revisions to the licensing arrangements that improve compliance by all parties

3. **Review and revise the system for sourcing basic seed from public research institutions.** Seed producers are required to submit requests for basic seed to ZARI before the start of the seed marketing season; however, these requests are often submitted late, delaying the supply of basic seed and reducing the volumes produced. The proposal is for:
   - ZARI and ZASTA to review the basic seed sourcing system for ZARI varieties and identify the specific implementation constraints. The two institutions should then jointly develop a feasible and sustainable system for basic seed demand forecasting
4. **Close loopholes in seed supply agreements between seed companies and growers** that allow growers to sell seed to other companies outside the agreed terms. This occurs because some growers are contracted by multiple companies, or because reliable growers are in short supply. To address this, ZASTA should:
   - Work with seed companies and SCCI to develop a seed traceability system that tracks the seed at the production stage, from sourcing of basic seed to seed production and seed sale
5. **Encourage private sector involvement in wheat seed production.** Only five seed companies produced and sold wheat seed in the 2024/25 season, and the sector's HHI score of 5,284 indicates extreme concentration among a few companies. This is despite Zambia being a net importer of wheat: in the 2022/23 agriculture season, the country imported 110,000 Mt of wheat, equating to an import bill of USD 70 million. The proposal is for:
   - ZASTA to facilitate linkages between seed companies and wheat milling companies to generate demand for locally produced wheat, which would translate to higher demand for wheat seed
6. **Sustain the country's seed export performance.** Zambia is recognized as a seed production hub in Africa and the continent's leading exporter of maize seed. In the 2024/25 season, 88,381 Mt of maize seed was exported to 22 African countries and 4 countries outside of Africa. Both the government and the private sector have prioritized expanding the seed export market. To sustain this momentum, SCCI and ZASTA need to:
   - Continue to pursue European Union (EU) Equivalence Accreditation that would allow companies to export seed to the European Union
7. **Enhance efforts to address the challenge of counterfeit seed.** SCCI recorded 36 cases of counterfeit seed during the 2024/25 marketing season, all involving maize, and confiscated 24,023 Mt of counterfeit or illegal seed, including 23,348 Mt of counterfeit maize seed (about 12% of the maize seed on the market). Seed companies reported 100 cases, far more than SCCI recorded. SCCI and ZASTA should strengthen their existing measures, including:

- Conducting joint inspections by seed companies and SCCI, in collaboration with ZASTA, under the National Task Force that was established by the Ministry of Agriculture
- Tightening the seed package labelling system by restricting label production and acquisition to SCCI
- Conducting awareness campaigns among farmers and seed sellers about certified seed and the use of the seed package labels

8 **Address the causes of delays in FISP payments to seed producers.** In the 2024/25 marketing season, 18 of the 39 surveyed seed producers sold seed under the FISP program. Overall, the companies were satisfied with the openness and transparency of the procurement process but less satisfied with the efficiency of government payments, which they rated "fair" at 53%. The late payments also affected farmers selling grain to the Food Reserve Agency (FRA), who in turn faced cash flow constraints that led to late purchases of inputs. The Ministry of Agriculture should:

- Review the payment arrangements under FISP with a view to improving the processes

9 **Strengthen ZASTA as the national platform for the seed sector in Zambia.** Members rated ZASTA at 69% (out of 100%), which is relatively high, and on the positive side acknowledged its level of engagement in key seed sector activities. However, given the seed sector's rapidly evolving landscape, ZASTA needs to keep pace by proactively responding to industry challenges and priorities. To that end, ZASTA should:

- Improve membership outreach. Only 22 out of 39 surveyed seed producers were members of ZASTA. The main cited reasons for non-membership were high subscription fees and limited awareness of ZASTA
- Improve capacity to generate resources for activities. Members' lowest rating for ZASTA pertained to its ability to mobilize resources, at 60%
- Continue to proactively and promptly respond to emerging industry issues including the high corporate tax of 30% faced by seed companies, compared to the 10% tax rate for other industries. Other pressing concerns include Malawi's increase of its import tax to 20% and the closure of the Zimbabwe border — both of which affect Zambia's export performance

10 **Monitor internal seed quality control systems for small and emerging seed companies.** Several seed companies lack the capacity to meet the legal requirements for conducting seed business outlined in the Plant Variety and Seeds Act and its Regulations. As a result, 11 of the registered seed producers did not produce any seed in 2024/25 — most transitioned to become agro-dealers, while a few started importing seed or ceased seed-related activities altogether. In addition, eight of the registered, active seed companies produced very low volumes of certified seed (less than 10 Mt for the key crops), evidence of low internal capacity. The proposal is for:

- SCCI to closely monitor all seed companies to assess their performance

11 **Increase funding for the government agricultural extension service.** The Department of Agriculture, under the Ministry of Agriculture, is responsible for agricultural extension. According to the Ministry, there are 2,722 extension officers — a ratio of 1 officer for every 1,700 farmers, more than four times the FAO-recommended ratio of 1:400. The Ministry has also divided the country into 489 agricultural blocks and 3,200 agricultural camps through which extension officers are deployed and services delivered; by April 2026, camp houses had been built in only 26% of the camps. To complement the government's extension workforce, seed companies employed 4,741 extension officers. The proposals are:

- To increase funding for agricultural extension services in order to establish the remaining agricultural camps and raise the number of extension officers to the required levels across all camps
- To enhance coordination between government and private sector agricultural extension officers to ensure maximum coverage across the country
- To have the Ministry of Agriculture develop a framework for transferring technology to the extension service, through which SCCI and ZARI can share information on new plant varieties as a way of improving productivity among small-scale farmers in rural areas. This will increase adoption of new, more productive varieties

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