



Access to Seeds
Index



Progress Report Q3 2017

July – September 2017

This report provides an overview of the activities, milestones and progress involved in developing the Access to Seeds Index 2018 in the period July – September 2017.

Amsterdam, 2 October 2017



Bridging the gap between the
world's leading seed companies
and the smallholder farmer

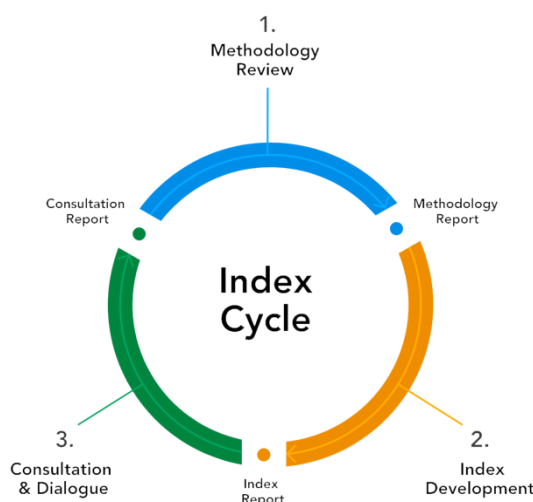
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General Project Data	
Project Name	Access to Seeds Index 2018
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1. Introduction

This report provides an overview of the activities, milestones and progress in developing the Access to Seeds Index 2018 in the period July - September 2017. This period is part of the first step, methodology review, of the Index Cycle that guides the development of each Index.



This Index Cycle consists of three steps. As a first step, the methodology for the Access to Seeds Index is developed, after consultation with stakeholders and experts. In the second step, company performance is analyzed, resulting in an Access to Seeds Index. After publication, the third step of dialogue and consultation starts, in order to discuss the Index's findings and insights.

After this final stage, the cycle starts again, using insights from the consultation phase to review the methodology.

2. About the Access to Seeds Index

The Access to Seeds Index evaluates and compares seed companies according to their efforts to improve access to quality seeds of improved varieties for smallholder farmers. The Index seeks primarily to identify leadership and good practices, providing an evidence base for the discussion on where and how the seed industry can step up its efforts.

Private sector engagement is at the heart of the Sustainable Development Goals (SDGs) adopted by the United Nations in 2015. By creating a better understanding of the seed industry's performance, the Index aims to contribute to the achievement of these goals.

Hunger is a daily reality for almost one billion people around the world. The global population is expected to grow by a further two billion in the coming decades, precisely in those regions that are currently considered food insecure. Improving access to seeds for farmers in those regions is key to meeting future food demands. This is where the seed industry can play a crucial role.

Based on how important stakeholders – farmers, governments, scientists, NGOs and the industry itself – view the role and responsibility of the seed industry, a methodology was developed with clearly defined criteria. After publication of each Index the methodology is reviewed and updated. Using this iterative approach, the Index aims to monitor progress over time.

The Access to Seeds Index is published by the Access to Seeds Foundation, an independent, non-profit organization based in The Netherlands. The Access to Seeds Foundation is part of the Index Alliance, a group of foundations dedicated to establishing industry benchmarks measuring corporate performance towards the SDG-agenda.

3. Progress Overview Q3 2017

This section provides an overview of activities and milestones in the period July - September 2017. The main goal of this period was finalizing the methodology development and landscaping for new regional indexes.

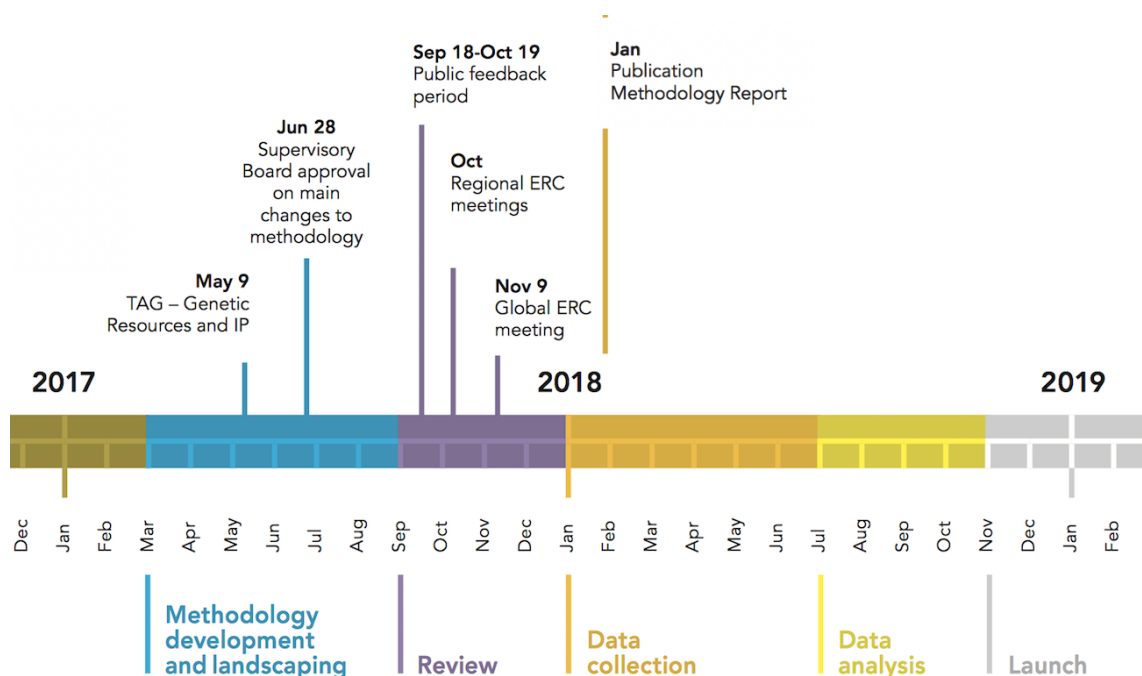


Illustration: Project timeline

1. Landscaping studies for new regional indexes completed

In August 2017, the three landscaping studies, aimed at exploring the feasibility of new regional indexes for Eastern & Southern Africa, Western & Central Africa and South & Southeast Asia, were completed.

The main outcome of the landscaping study for Eastern & Southern Africa was the recommendation to develop one combined regional index for Eastern Africa and Southern Africa rather than two separate indexes, due to the large overlap of company activity in these regions. The studies for Western & Central Africa and South & Southeast Asia found that a regional index for these regions is feasible, based on support among regional stakeholders and the presence of regional companies that fit the criteria of the Access to Seeds Index.

For each region, a total of 20 companies have been selected. This selection is subject to expert review in October 2017. The landscaping studies are being used in the final methodology review steps and will be published in the beginning of 2018.

2. Company scope for the Global Access to Seeds Index revisited

The 2016 Access to Seeds Index presented two separate rankings for global seed companies active in field crop seeds and vegetable seed. For the 2018 Index, the proposal is to combine field crops and vegetable seed companies in one list. This is in line with how the industry itself communicates about the main companies.

Following recommendations from stakeholders and experts, a new category has been added to the global league: regional leaders with a global presence and seed revenue of \$100 million and above. The landscaping studies identified only one company that meets this threshold: Advanta. Apart from this newcomer, the global list will show a lot of changes due to ongoing mergers and acquisitions at the top of the seed industry.

Company Scope Global Access to Seeds Index

Company	Country	Seed portfolio	Seed sales 2016 (\$ mln)
Advanta	ARE (UAE)	Field crops & vegetables	213
Bayer*	DEU	Field crops & vegetables	1592
Bejo	NLD	Vegetables	270
Dow DuPont**	USA	Field crops	7428
East-West Seed	THA	Vegetables	150
Enza Zaden	NLD	Vegetables	281
Groupe Limagrain	FRA	Field crops & vegetables	2347
KWS SAAT AG	DEU	Field crops	1216
Monsanto*	USA	Field crops & vegetables	9988
Rijk Zwaan	NLD	Vegetables	455
Sakata	JPN	Vegetables	330
Syngenta***	CHE	Field crops & vegetables	2657
Takii	JPN	Vegetables	446

Company Scope Regional Index for South & Southeast Asia

Company	Country	Seed portfolio
Annapurna Seeds	NP	Field crops & vegetables
Bayer*	DEU	Field crops
Bioseed	IND	Field crops & vegetables
BRAC	DB	Field crops & vegetables
Charoen Pokphand	THL	Field crops & vegetables
DowDuPont**	USA	Field crops
East-West Seed	THA	Vegetables
Kalash Seeds	IND	Field crops & vegetables
Known-You Seed	CN / TW	Field crops & vegetables
Koreana Seed / Nongwoo Bio	SK	Vegetables
Lal Teer Seeds	BD	Vegetables
Mahyco	IND	Field crops & vegetables
Monsanto	USA	Field crops & vegetables
National Seeds Corporation	IND	Field crops & vegetables
Nuziveedu Seeds	IND	Field crops
Pacific Seeds/ Advanta	UAE	Field crops & vegetables
Punjab Seed Corporation	PK	Field crops & vegetables
Rallis India Ltd.	IND	Field crops
Syngenta***	CHE	Field crops & vegetables
Vinaseed	VT	Field crops & vegetables

Company Scope Regional Index for Western & Central Africa

Company	Country	Seed portfolio
AGRIPLUS SARL	MLI	Field crops & vegetables
AINOMA	NER	Field crops & vegetables
BILOFH	CIV	Field crops & vegetables
DA-Allgreen	NGA	Field crops & vegetables
DowDuPont**	USA	Field crops
East-West Seed	THA	Vegetables
FASO KABA	MLI	Field crops & vegetables
Green Agriculture West Africa Limited (GAWAL)	CHN	Field crops & vegetables
Heritage Seeds Ltd	GHA	Field crops
Monsanto*	USA	Field crops & vegetables
NAFASO (Neema Agricole du Faso)	BFA	Field crops
Pop Vriend Seed	NLD	Vegetables
Premier Seed	NGA	Field crops & vegetables
Seed Co	ZWE	Field crops & vegetables
SEDAB SARL	SEN	Field crops
SEMAGRI SARL	CMR	Vegetables
Syngenta***	CHE	Field crops & vegetables
Technisem	FRA	Vegetables
Tropicasem	SEN	Field crops & vegetables
Value Seed	NGA	Field crops & vegetables

Company Scope Regional Index for Eastern & Southern Africa

Company	Country	Seed portfolio
Darusalam Seed Co	SOM	Field crops
Demeter Seed	MWI	Field crops
DowDuPont**	USA	Field crops
East-African Seed	KEN	Field crops & vegetables
East West-Seed	THA	Vegetables
Ethiopian Seed Enterprise	ETH	Field crops
Equator Seed Co	UGA	Field crops
FICA Seed	UGA	Field crops & vegetables
Hygrotech	ZAF	Vegetables
Kenya Seed Company	KEN	Field crops & vegetables
Klein Karoo Seed Marketing	ZAF	Field crops & vegetables
Monsanto*	USA	Field crops & vegetables
NASECO	UGA	Field crops
Pop Vriend Seed	NLD	Vegetables
Seed Co	ZWE	Field crops & vegetables
Starke Ayres	ZAF	Vegetables
Syngenta***	CHE	Field crops & vegetables
Technisem	FRA	Vegetables
Victoria Seeds	UGA	Field crops & vegetables
Zamseed	ZAM	Field crops & vegetables

3. Public consultation period started

From 18 September to 19 October, stakeholders are invited to provide feedback on the draft methodology of the 2018 Access to Seeds Index. To this end, the start of the consultation period was announced via the quarterly newsletter, social media and direct invitations to companies, experts and stakeholders. Feedback gathered in this period will be used as input for the final step of the methodology development process: expert review committee meetings planned for October and November.

4. Composition of expert review committees finalized

Expert review committees (ERCs) play a decisive role in the methodology development process. They perform a final evaluation of the proposed methodology and review whether changes are in line with input from stakeholders. These committees also play a crucial role in ensuring that the multi-stakeholder perspective is well-represented in the Index's methodology.

Each regional index has its own expert review committee. Therefore, new ERCs were formed for the new indexes, Western & Central Africa and South & Southeast Asia. Due to the expansion of the Eastern African index into Southern Africa, composition of the ERC for this regional index was reviewed to ensure adequate regional representation. In addition to this, three members of the Global ERC were replaced with new members.

Composition expert review committees for the Access to Seeds Index 2018

Global ERC

1. Paula Bramel, Deputy Executive Director of the Global Crop Diversity Trust
2. Gigi Manicad, Senior Program Manager at Oxfam
3. Michael Halewood, Head of Policy Research at Bioversity International
4. Ram Kaundinya, former CEO and Managing Director of Advanta
5. Stephen Mugo, Maize breeder and Kenya Country Representative CYMMIT
6. Thomas Osborn, Former Senior Agricultural Officer at FAO
7. David Spielman, Senior Research Fellow at IFPRI
8. Ajay Vir Jakhar, Chairman of Bharat Krishak Samaj

Regional ERC for Eastern & Southern Africa

1. Fhumulani Mashau, Projects Officer SCAU
2. Essau Mwendo Phiri, Chairman National Smallholder farmers' Association Malawi
3. John Mukuka, Seed development expert, COMESA
4. Patience Nyakanda, Zimbabwe Plant Breeders Association
5. Bob Shuma, Tanzania Seed Trade Association (TASTA)
6. Evans Sikinyi, Seed Consultant, Rwanda Ministry of Agriculture and Livestock

Regional ERC for Western & Central Africa

1. Inoussa Akintayo, Africa Rice Liberia
2. Ernest Asiedu, CORAF/WE CARD
3. Issoufou Kapran, AGRA (tbc)
4. Kouamé Mezzian, AfricaSeeds
5. Ousmane Ndiaye, ASPRODEB/ROPPA
6. Oumar Niangado, Syngenta Foundation (tbc)

Regional ERC for South & Southeast Asia

1. Amirul Islam, Asian Farmers' Association
2. Ram Kaundinya, former CEO and Managing Director of Advanta
3. Orachos Napisintuwong, Kasetsart University Bangkok
4. Lito Patonona, President Vigour Seeds Philippines (tbc)
5. Uma Shankar Singh, IIRI
6. Ajay Vir Jakhar, Chairman Bharat Krishak Samaj

5. Access to Seeds Index discussed at various occasions with seed companies

An indication for growing support and interest from seed companies for the Access to Seeds Index is invitations to present the findings at various meetings and seminars.

On 3 July, insights from the Access to Seeds Index were presented at a seminar for the Thai seed industry in Chiang Mai, which focused on the Thai ambition to become a global seed

hub. The Access to Seeds Index was also invited by Syngenta to participate in a seminar during the Responsible Business Forum in Johannesburg (31 August) and to participate in a panel discussion on the Future of Farming, organized by Bayer Cropsience in Monheim (19 September).



Thai seed seminar. Chiang Mai, 3 July



Responsible Business Forum. Johannesburg, 31 August



Future of Farming Dialog. Monheim, 19 September

6. Start of World Benchmarking Alliance announced in New York

The goal of the World Benchmarking Alliance (WBA) is to measure corporate performance towards the SDG-agenda through industry benchmarking. The Index Initiative, a project hosted by the Access to Seeds Foundation, performs the role of executive office for this alliance. The Access to Seeds Index is one of the allies of this initiative.

The WBA indicates growing international support for industry benchmarking, as it is endorsed by NGOs like Oxfam and WWF and financially supported by the governments of the UK, The Netherlands and Denmark. The founding fathers of the WBA are investor Aviva, the UN Foundation, Index Initiative and the Business & Sustainable Development Commission.



Minister Lilianne Ploumen giving a speech at the launch of the World Benchmarking Alliance, New York, 21 September 2017

4. Contribution of Activities to Objectives and Deliverables

A detailed overview of the Theory of Change, overall objectives and deliverables of the Access to Seeds Index was provided in the previous quarterly report (Q2 2017). The overview below indicates how the activities and milestones of Q3 contribute to the overall objectives of the Access to Seeds Index.

Overall Objectives

1. Increase transparency on current strategies and activities of seed companies to improve access to seeds for smallholders and their contribution to the SDG-agenda.
2. Provide an evidence base for the conversation within and with the seed industry on how they can step up their efforts.
3. Encourage companies to increase transparency and performance of their efforts to improve access to seeds for smallholder farmers.
4. Provide insights on performance of individual companies to enable other stakeholders to cooperate or build partnerships with seed companies.
5. Strengthen the position of the Access to Seeds Foundation through a global alliance with other index initiatives and affiliation with established global organization

	Overall objectives				
	Increase Transparency	Enable Dialogue	Encourage Companies	Enable Partnerships	Strengthen Foundation
Activities and Milestones Q3 2017					
Landscaping studies for new regional Indexes completed					
Company scope for the Global Access to Seeds Index revisited					
Public consultation period started					
Composition of expert review committees finalized					
ATSI discussed at various occasions with seed companies					
Start of World Benchmarking Alliance announced in New York					

5. Results Tracker

This project works towards four deliverables following the Index Cycle of (1) methodology review (2) index development (3) conversation and dialogue. The four deliverables are created following the steps below. The project is currently on schedule.

The four deliverables are

1. Global Index of globally operating seed companies
2. Regional Index of leading seed companies in Eastern and Southern Africa
3. Regional Index of leading seed companies in Western and Central Africa
4. Regional Index of leading seed companies in South and Southeast Asia

Activity	Due date	Progress
Identify regional partners	31 March 2017	Completed
Landscaping studies finalized	30 Sept 2017	Completed
Public consultation methodology	30 October 2017	On track
Expert Review Committee meetings	30 November 2017	On track
Methodology finalized	31 January 2018	On track
Design Research Process ready	31 March 2018	On track, Feb 2018
Methodology Report published	31 March 2018	On track, Jan 2018
Index Alliance created	31 May 2018	Finalized end of 2017
Publication Index Reports	31 March 2019	
Regional Roundtables	30 November 2019	
Consultation Report	31 December 2019	

6. Variation from the Original Plan

In this period, all activities were conducted according to plan. No changes were made.