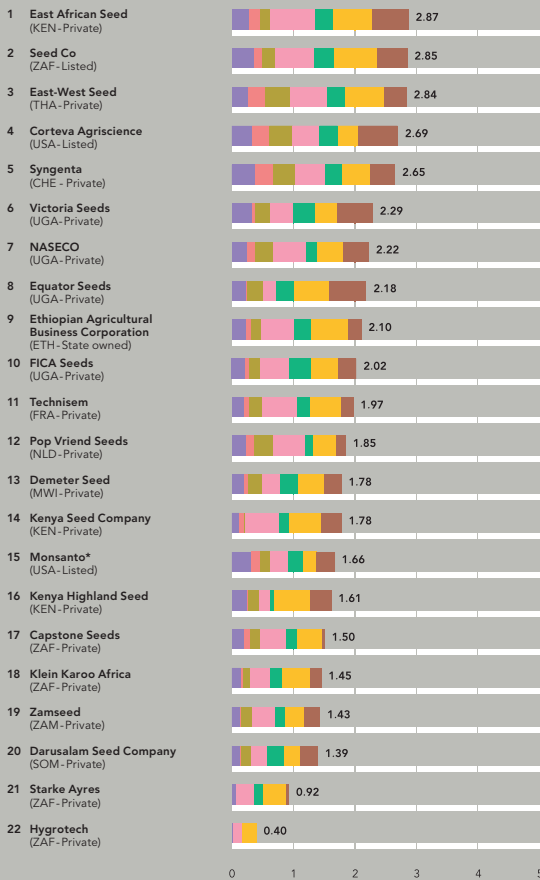




Access to Seeds  
Index

# Access to Seeds Index 2019 Eastern and Southern Africa

Seed companies are a crucial partner in efforts to raise smallholder farmer productivity and achieve food and nutrition security. For the second time, the Access to Seeds Index shines a light on companies taking the lead in reaching smallholder farmers in Eastern and Southern Africa.



The Access to Seeds Index presents an overall ranking, which is the weighted sum of the results in seven measurement areas. The rankings for each of these areas are available online.

East African Seed tops the 2019 Index, two places higher than in 2016, thanks to its continuing robust access to seeds strategies and broad portfolio availability, clear improvements in its smallholder-focused research program and a growing dedicated pool of extension staff providing tailored training.

The 2019 Index, which gives more weight to the extent of company activities in the region, sees Seed Co rank second, nine places higher than in 2016, primarily due to the wide spread of its activities across the region as it leads in production, testing and training locations. Thailand-based East-West Seed, which continues to grow its business activities in the region, ranks closely behind in third.

Corteva Agriscience ranks fourth, up two places from 2016 and outpacing its global peers in field crops, thanks to its extensive business operations in the region, including through its Pannar brand. Syngenta, ranking fifth, demonstrates strengths in setting commitments as well as activities carried out by its affiliated non-profit Syngenta Foundation.

Ugandan companies Victoria Seeds, NASECO, Equator Seeds and FICA Seeds also make it into the top ten, showcasing smallholder-focused operations, in particular in their home country. This is also the case for Ethiopian Agricultural Business Corporation, which moves up seven places and serves smallholder customers in the remotest areas of the country.

#### Measurement areas



\*In August 2018, Bayer completed the \$66 billion takeover of Monsanto. The 2019 index reflects company activities in the 2016-2017 period, prior to the takeover

# More information online

All results and background information is available online. The dedicated website contains more information on the ranking, the methodology and the key findings. For each company a separate scorecard is presented. For every country in scope an overview of seed company presence is available.

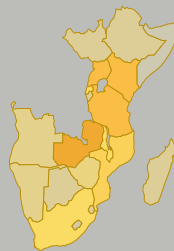
## Key findings

The index presents key findings on the industry's presence and portfolio as featured below, as well as on its performance on specific measurement areas.

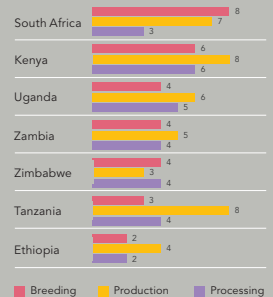
**Companies are present in all index countries and are investing in local seed sector development, but need to step up efforts to reach more smallholders**

All index countries have company representation, varying from 12 to 13 companies in Kenya, Tanzania, Uganda and Zambia, to five and three in Lesotho and Somalia respectively. South Africa leads in breeding, Kenya and Tanzania lead in seed production, while Ethiopia, Uganda, Zambia and Zimbabwe also have significant company operations. None or limited investments were found in Botswana, Burundi, Eswatini, Lesotho and Namibia. However, despite significant investments and the broad presence of seed companies across the region, smallholder farmers continue, to a very large extent, to get their seeds from the informal sector.

### Seed company presence



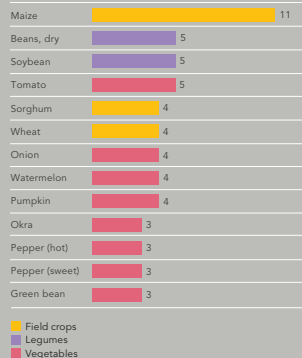
### Seed company investment



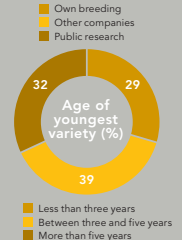
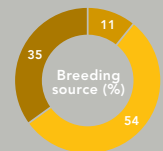
**Breeding focus is primarily on maize, with limited availability of diversity in varieties of other crops**

Maize dominates breeding, raising concerns over crop diversity and adaptability within the regional seed system. Eleven companies report active maize programs, more than double that of dry beans, soybean and tomato, the next most frequently bred crops. Field crops and legumes are bred more frequently than vegetables, with only three of the six specialized vegetable companies demonstrating broad breeding programs in the region itself. Global companies have more developed breeding programs, releasing nearly double the number of new varieties. Consequently, 61% of their portfolios are less than three years old, compared to 30% for regional companies. Regional peers rely more on other seed companies and public research institutes for parent material and germplasm.

### Number of companies with breeding programs for crops



### Portfolio of regional companies



# Company scorecards

The company scorecards highlight a company's presence and portfolio, leading practices and notable findings. They also present comparative strengths.

### East African Seed company profile

**1** **Head of 22** **Seed 1**

**Eastern and Southern Africa**

East African Seed leads the Eastern and Southern Africa Index, a benchmark of strong and consistent performance across the majority of the measurement areas. The company is leader in Research & Development, with a smaller farmer-focused research program for both staple and leafy greens. The company owns its strong performance in Seed Production to a commitment to engage smallholder farmers and manage quality management processes. In Capacity Building, the company takes its approach, resulting in the specific needs of individual smallholders and demonstrating a region-leading level of client and customer satisfaction. East African Seed also excels in Marketing & Sales, reaching remote areas in core markets, offering an excellent farmer services as an agricultural inputs beyond seed and implementing a range of demonstration and extension strategies. The company leads in Intellectual Property, placing several registrations on smallholder's ability to use farm saved seed and Genetic Resources, where it does not report on any access and benefit sharing activities.

**Leading practices**

- East African Seed demonstrates a leading use of information and communication technology (ICT) in business operations, including its 2019-2020 season, being the first to use mobile-based services for purchase of agricultural inputs and reports on risk and other smallholder services through a mobile-based platform. The company's information system, Kenya's seed sector and estimated 2020-2021 harvest area (25M), and consistent operations serving its smallholder stakeholders with the company's Farming Tech.
- The company recognizes the value of independent third-party regional coordination and promotes and offers technical assistance to its producers these regions in general. Research and extension activities have been undertaken in a range of areas including heavy markets and off-season, including a 100% market and off-season program in Kenya's main customer satisfaction program. This includes leading in the development of a new seed and the development of a new seed and the development of a new seed and the development of a new seed.
- The company has customer satisfaction program. This includes leading in the development of a new seed and the development of a new seed and the development of a new seed.

**Areas for improvement**

- East African Seed does not have a clear strategy to increase its share of business in the seed sector, including the use of farm-saved seed. The company's strategy to increase its share of business in the seed sector, including the use of farm-saved seed. The company's strategy to increase its share of business in the seed sector, including the use of farm-saved seed.

### company portfolio

**Notable findings**

East African Seed collaborates with the regional Seed Trade Association, Uganda Seed Trade Association, Uganda Seed Trade Association, and Uganda Seed Trade Association to create a platform for the industry to tackle the problem more comprehensively. The partnership involves information and data to be shared among stakeholders in the regional sector.

The company supports sustainability at the CEO level for the implementation of policies. The company is active in social and environmental issues, including the use of farm-saved seed. The company's strategy to increase its share of business in the seed sector, including the use of farm-saved seed.

**Options in scope**

The company is exploring adding a range of crop types and production locations. The company is exploring adding a range of crop types and production locations. The company is exploring adding a range of crop types and production locations.

**Portfolio information**

Index crops in portfolio	Sales		Seed type		Source		Local crops in portfolio
	2019	2020	Open pollinated	Hybrid	Local	Imported	
Field crops	...	...	...	...	...	...	...
Vegetables	...	...	...	...	...	...	...

# Country profiles

The country profiles provide insights in a country's seed sector and an overview of the presence and activities of index companies in each country.

### Kenya country profile

**The seed sector in Kenya**

The agriculture sector comprises more than 95% of Kenya's total population and more than 70% of its total GDP. The sector is a major source of employment and provides food and income for more than 80% of the population. With growing population, the sector is expected to continue to be a major source of employment and income for the country.

**Key findings**

Kenya's seed industry is growing but is still in the early stages of development. The sector is dominated by a few large players and is characterized by a high level of informality. The industry is facing several challenges, including a lack of investment in research and development, a limited number of seed companies, and a high level of seed loss. The industry is also facing a significant challenge in terms of access to credit and other financial services. The industry is expected to continue to grow in the coming years, but it will need to overcome these challenges to reach its full potential.

### company activities

**Company activities identified in Kenya**

Company	Crops in Portfolio	Research	Production	Marketing	Extension	Capacity Building	Genetic Resources
Agribank	...	...	...	...	...	...	...
...	...	...	...	...	...	...	...

**Other companies identified in the regional landscape study and their activities**

Company	Crops in Portfolio	Research	Production	Marketing	Extension	Capacity Building	Genetic Resources
...	...	...	...	...	...	...	...

### company presence

**Observations**

The presence of the Seed and Seedling Act in Kenya is a key factor in the development of the seed sector. The Act provides a legal framework for the seed industry and is expected to lead to a more professional and competitive sector. The Act also provides for the establishment of a Seed Board, which will be responsible for regulating the seed industry and promoting its development. The Act is expected to lead to a more professional and competitive seed industry in Kenya.



# Access to Seeds Index 2019

The Access to Seeds Index 2019 is one of the first benchmarks to be published as part of the World Benchmarking Alliance (WBA), launched in September 2018 during the UN General Assembly in New York. The goal of WBA benchmarks is to increase the contribution of the private sector to achieving the SDGs.

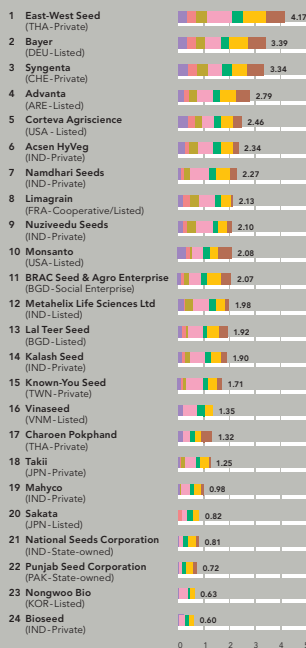
The Access to Seeds Index 2019 highlights different aspects of the seed industry. The Access to Seeds Index for Eastern and Southern Africa focuses on 22 leading seed companies in this region. This was preceded by a ranking of the industry in South and Southeast Asia and a ranking of Global Seed Companies. An evaluation of the industry in Western and Central Africa is upcoming.

## Access to Seeds Index South and Southeast Asia



Published in  
November 2018

Ranking for the  
South and Southeast Asia Index

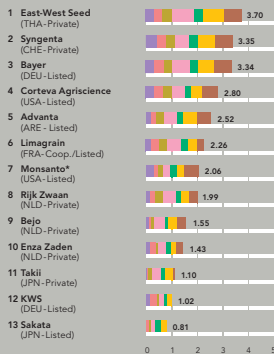


## Access to Seeds Index Global Seed Companies



Published in  
January 2019

Ranking for the  
Global Seed Companies Index



## Access to Seeds Index Western and Central Africa



New study upcoming  
in April 2019

23 companies are nominated for  
the Western and Central Africa Index

Company	Country
AGRIPLUS	MLI
AINOMA	NER
BILOHF	CIV
Da-Allgreen Seeds	NGA
Corteva Agriscience	USA
East-West Seed	THA
Faso Kaba	MLI
GAWAL	CHN
Heritage Seeds	GHA
Maslaha Seeds	NGA
Monsanto	USA
NAFASO	BFA
Nankosem	BFA
Pop Vriend Seeds	NLD
Premier Seed	NGA
Seed Co	ZWE
SEDAB	SEN
SEMAGRI	CMR
Soprosa	MLI
Syngenta	CHE
Technisem	FRA
Tropicasem	SEN
Value Seed	NGA