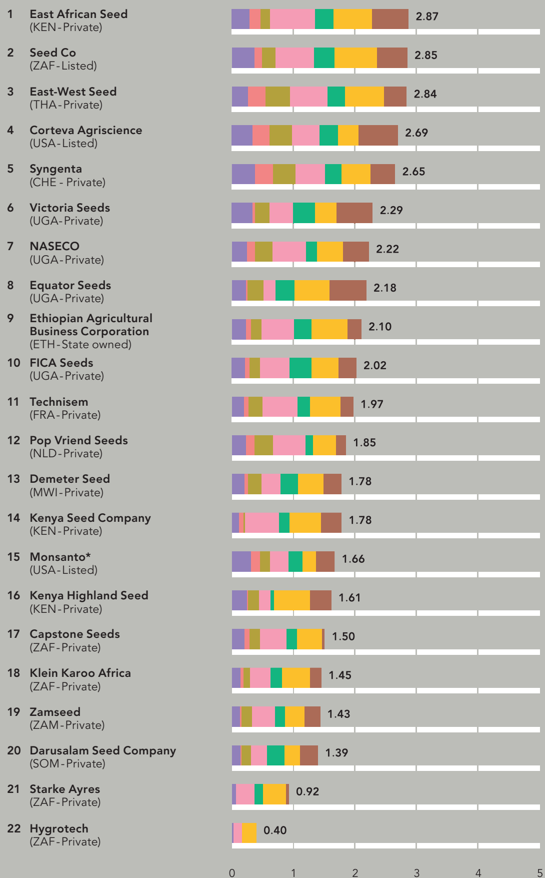
Access to Seeds Index 2019
Eastern and Southern Africa

Access to Seeds Index

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.



*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

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

- Governance & Strategy
- Genetic Resources
- Intellectual Property
- Research & Development
- Seed Production
- Marketing & Sales
- Capacity Building

www.accesstoseeds.org/index/eastern-southern-africa

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.

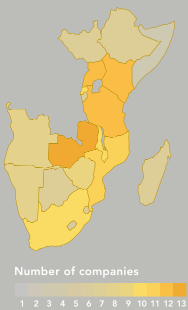
Key findings

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.

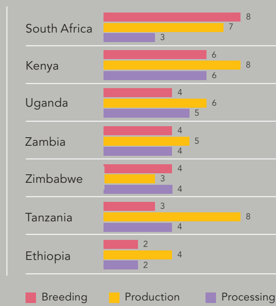
Companies are present in all index countries and are investing in local seed sector development, but need to step up efforts to reach more smallholders

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



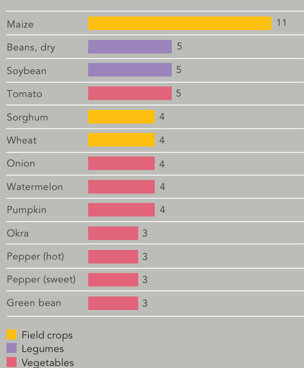
Seed company investment



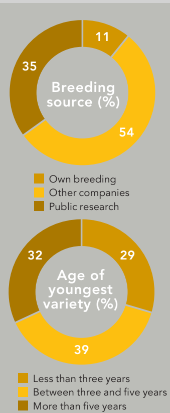
Breeding focus is primarily on maize, with limited availability of diversity in varieties of other crops

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



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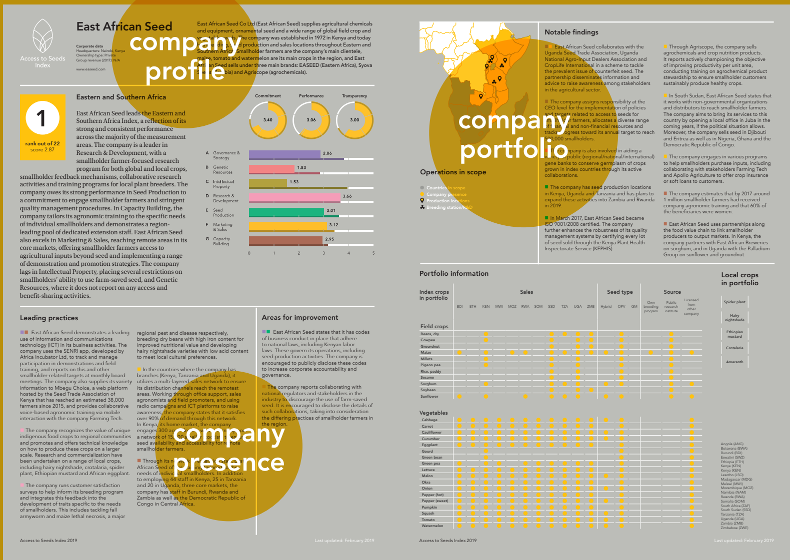
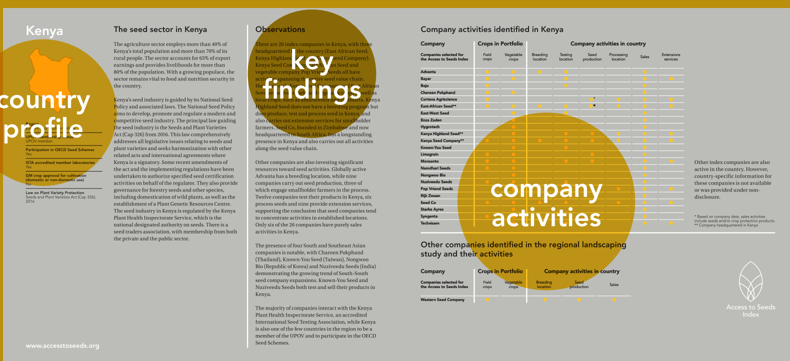
Company scorecards

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



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.



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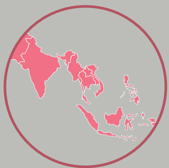
Access to Seeds Index 2019

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

1	East-West Seed (THA-Private)	4.17
2	Bayer (DEU-Listed)	3.39
3	Syngenta (CHE-Private)	3.34
4	Advanta (ARE-Listed)	2.79
5	Corteva Agriscience (USA - Listed)	2.46
6	Acsen HyVeg (IND-Private)	2.34
7	Namdhari Seeds (IND-Private)	2.27
8	Limagrain (FRA-Cooperative/Listed)	2.13
9	Nuziveedu Seeds (IND-Private)	2.10
10	Monsanto (USA-Listed)	2.08
11	BRAC Seed & Agro Enterprise (BGD-Social Enterprise)	2.07
12	Metahelix Life Sciences Ltd (IND-Listed)	1.98
13	Lal Teer Seed (BGD-Listed)	1.92
14	Kalash Seed (IND-Private)	1.90
15	Known-You Seed (TWN-Private)	1.71
16	Vinaseed (VNM-Listed)	1.35
17	Charoen Pokphand (THA-Private)	1.32
18	Takii (JPN-Private)	1.25
19	Mahyco (IND-Private)	0.98
20	Sakata (JPN-Listed)	0.82
21	National Seeds Corporation (IND-State-owned)	0.81
22	Punjab Seed Corporation (PAK-State-owned)	0.72
23	Nongwoo Bio (KOR-Listed)	0.63
24	Bioseed (IND-Private)	0.60

Access to Seeds Index Global Seed Companies

Published in January 2019

Ranking for the Global Seed Companies Index

1	East-West Seed (THA-Private)	3.70
2	Syngenta (CHE-Private)	3.35
3	Bayer (DEU-Listed)	3.34
4	Corteva Agriscience (USA-Listed)	2.80
5	Advanta (ARE - Listed)	2.52
6	Limagrain (FRA-Coop./Listed)	2.26
7	Monsanto* (USA-Listed)	2.06
8	Rijk Zwaan (NLD-Private)	1.99
9	Bejo (NLD-Private)	1.55
10	Enza Zaden (NLD-Private)	1.43
11	Takii (JPN-Private)	1.10
12	KWS (DEU-Listed)	1.02
13	Sakata (JPN-Listed)	0.81

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

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