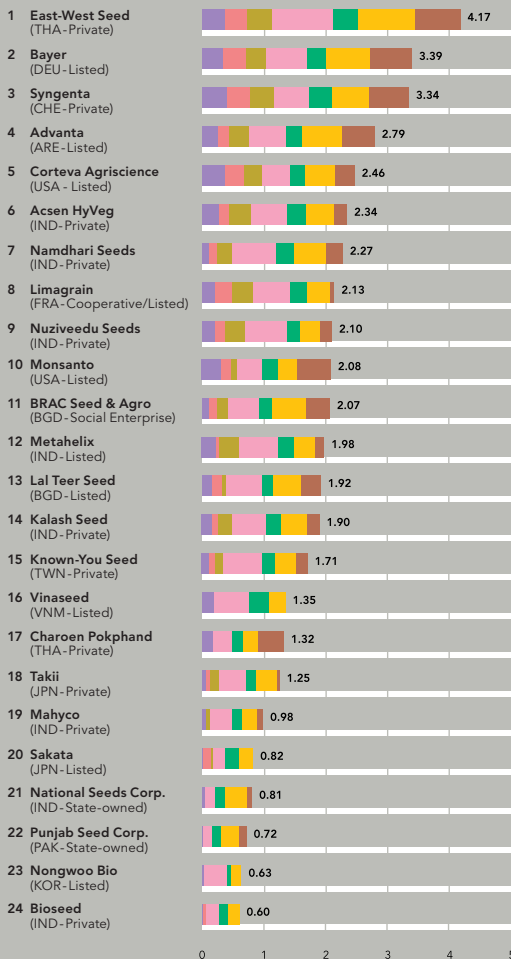




Access to Seeds Index

Access to Seeds Index 2019 South and Southeast Asia

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



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 on www.accesstoseeds.org (deze vervangen voor een eigen link voor de longread)

Thailand-based East-West Seed tops this first South and Southeast Asia Index. The company is built around a smallholder-centric business model, which is reflected in a client base made up almost entirely (98%) of smallholders. Originating in the region but now operating globally, it serves as an example for its peers thanks to a breeding program and product portfolio that includes local crops and capacity building activities in all the countries where it is active.

Overall, the five highest scoring companies are globally active. Their roots are in the region (East-West Seed, Advanta) or they have had breeding, production and distribution activities in the region for a long time (Bayer, Syngenta, Corteva), making them as rooted in the region as companies that originate there.

Compared to regional seed companies, these globally active companies tend to have more comprehensive strategies in place, with clear targets for tackling food and nutrition security. Global companies also generally employ the same business model and extensive portfolio across markets, whereas regional companies typically have strong programs to support smallholder farmer productivity in their home country but confine their activities abroad to sales and offer a smaller portfolio.

The highest scoring regional company is Acscen HyVeg, closely followed by Namdhari Seeds. Companies at the bottom of the ranking generally score low due to a lack of disclosure.

Measurement areas



More information online

All results and background information is available on our website
www.accesstoseeds.org/index/south-southeast-asia

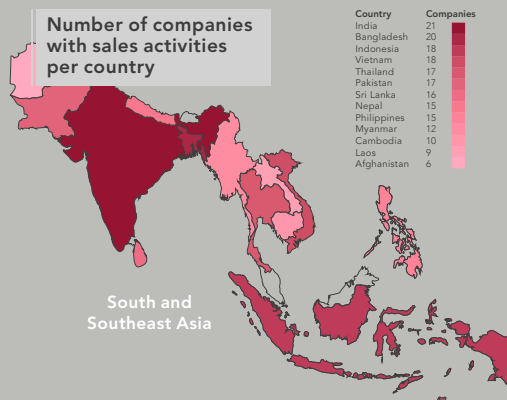
The dedicated website contains more information on the ranking, the methodology and the key findings. For each company a separate scorecard is presented. For every country in scope an overview of seed company presence is available.

Key findings

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

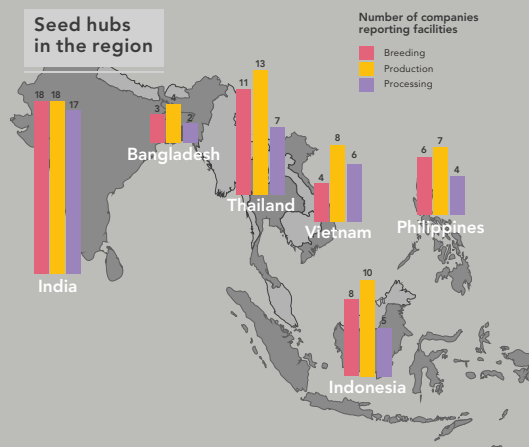
Seed companies are present throughout the region, but investments in five countries are limited

Almost all companies selected for the South and Southeast Asia Index have a presence in India. Even in Afghanistan and Laos, which are relatively overlooked, six and nine companies respectively have a presence. However, in these countries as well as in Sri Lanka, Nepal and Cambodia, most companies limit their activities to sales.



Six countries are seed hubs; three countries lack breeding and production activities

India, Thailand, Indonesia, Vietnam, the Philippines and Bangladesh can be considered seed hubs, based on the concentration of production, breeding and processing activities by index companies in these countries.



Company scorecards

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

East-West Seed company profile

South and Southeast Asia

East-West Seed leads in South and Southeast Asia. It is performing strongly across all measurement areas, with a variety of programs, initiatives and projects to improve access to seeds for smallholder farmers across the region. The company's business model is centered around smallholder farmers. As such, the company has put in place a company-wide strategy and mission statement around access to seeds for smallholder farmers. It has extensive distribution channels in all countries in which it makes the entire cropseed portfolio available, working in leading sectors in Marketing & Sales, R&D, Research & Development. The company shows leadership for having a breeding program for a high number of local crops, its high focus on seed production can be attributed to its collaboration with smallholder farmers, who account for 95% of its production.

1 rank out of 24 across 17

Leading practices

- East-West Seed demonstrates a strong commitment to access to seeds for smallholder farmers and farmers' a key strategy in its mission statement. The company acknowledges the importance of the role of the farmer to ensure there is a market that the company can deliver on. The company's business model is centered around smallholder farmers. As such, the company has put in place a company-wide strategy and mission statement around access to seeds for smallholder farmers. It has extensive distribution channels in all countries in which it makes the entire cropseed portfolio available, working in leading sectors in Marketing & Sales, R&D, Research & Development. The company shows leadership for having a breeding program for a high number of local crops, its high focus on seed production can be attributed to its collaboration with smallholder farmers, who account for 95% of its production.
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Areas for improvement

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Company presence

Operations in scope

Index crops in portfolio

Notable findings

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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.

Bangladesh country profile

Seed sector in Bangladesh

The Bangladesh Agricultural Development Corporation (BADC) is the largest seed producer and supplier in the country, mandated to produce large quantities of seed. Agricultural research institutions (ARI) are responsible for developing improved tolerant crops. Most of the plant breeding and seed production activities take place in the public domain.

The National Seed Policy (NSP), passed in 2015, placed an emphasis on involving private companies in the sector and market liberalization. However, there is a declining trend to create a favorable enabling environment in order to encourage seed companies to invest in BADC.

In terms of crop substitution, the eggplant is cultivated in Bangladesh. Nearly 27,000 smallholder farmers planted 18.1 DV eggplant in 2017. 1% of the country's eggplant area is attributed to its cultivation in Bangladesh. The eggplant is being cultivated.

Observations

There is a strong emphasis on increasing the number of smallholder farmers in Bangladesh. The government is focusing on increasing the number of smallholder farmers in Bangladesh. The government is focusing on increasing the number of smallholder farmers in Bangladesh. The government is focusing on increasing the number of smallholder farmers in Bangladesh.

Company activities identified in Bangladesh

Company	Crops in Portfolio			Company activities in country		
	Seed	Plant	Plant	Seed	Plant	Plant
Access to Seeds India	✓	✓	✓	✓	✓	✓
Access to Seeds India	✓	✓	✓	✓	✓	✓
Access to Seeds India	✓	✓	✓	✓	✓	✓
Access to Seeds India	✓	✓	✓	✓	✓	✓
Access to Seeds India	✓	✓	✓	✓	✓	✓
Access to Seeds India	✓	✓	✓	✓	✓	✓
Access to Seeds India	✓	✓	✓	✓	✓	✓
Access to Seeds India	✓	✓	✓	✓	✓	✓
Access to Seeds India	✓	✓	✓	✓	✓	✓
Access to Seeds India	✓	✓	✓	✓	✓	✓

Other local activities

Other local activities include regional landscaping study and their activities.

Company portfolio

Local crops in portfolio

Notable findings

East-West Seed has a strong commitment to access to seeds for smallholder farmers and farmers' a key strategy in its mission statement. The company acknowledges the importance of the role of the farmer to ensure there is a market that the company can deliver on. The company's business model is centered around smallholder farmers. As such, the company has put in place a company-wide strategy and mission statement around access to seeds for smallholder farmers. It has extensive distribution channels in all countries in which it makes the entire cropseed portfolio available, working in leading sectors in Marketing & Sales, R&D, Research & Development. The company shows leadership for having a breeding program for a high number of local crops, its high focus on seed production can be attributed to its collaboration with smallholder farmers, who account for 95% of its production.

Upcoming studies

The Access to Seeds Index for South and Southeast Asia is one of the first benchmarks to be published as part of the World Benchmarking Alliance (WBA), launched last September 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. Over the coming months, the Access to Seeds Index will publish other indexes focusing on global seed companies and the regional industry in sub-Saharan Africa.

Access to Seeds Index Global Seed Companies



New study upcoming
January 2019

The 13 companies nominated for the
Global Access to Seeds Index

Company	Country
Advanta	ARE
Bayer	DEU
Bejo	NLD
Corteva Agriscience	USA
East-West Seed	THA
Enza Zaden	NLD
Limagrain	FRA
KWS	DEU
Monsanto	USA
Rijk Zwaan	NLD
Sakata	JPN
Syngenta	CHE
Takii	JPN

Access to Seeds Index Eastern and Southern Africa



New study upcoming
February 2019

The 22 companies nominated for the
Regional Index for Eastern & Southern Africa

Company	Country
Capstone Seeds	ZAF
Darusalam Seed Co	SOM
Demeter Seed	MWI
Corteva Agriscience	USA
East African Seed	KEN
East-West Seed	THA
Ethiopian Seed Enterprise	ETH
Equator Seed Co	UGA
FICA Seeds	UGA
Hygrotech	ZAF
Kenya Seed Company	KEN
Kenya Highland Seed	KEN
Klein Karoo Seed Marketing	ZAF
Monsanto	USA
NASECO	UGA
Pop Vriend Seeds	NLD
Seed Co	ZWE
Starke Ayres	ZAF
Syngenta	CHE
Technisem	FRA
Victoria Seeds	UGA
Zamseed	ZAM

Access to Seeds Index Western and Central Africa



New study upcoming
February 2019

The 23 companies nominated for the
Regional Index for Western & Central Africa

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