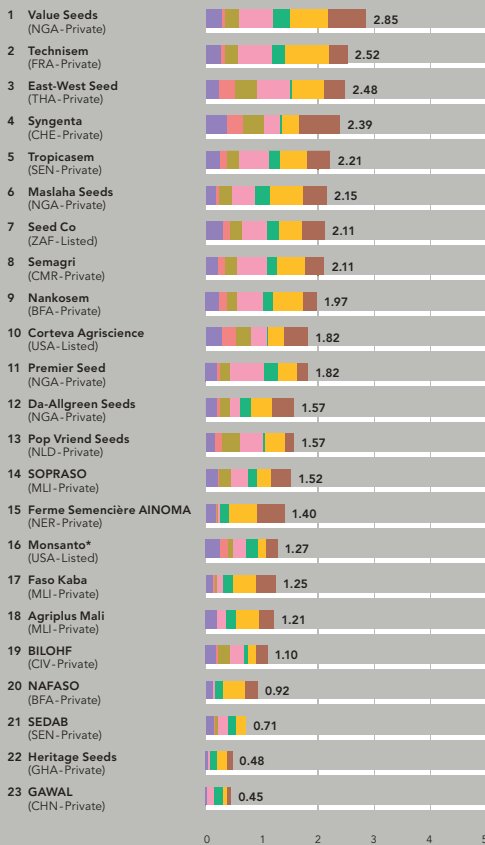




## Access to Seeds Index

# Access to Seeds Index 2019 Western and Central Africa

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 Western and Central 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.

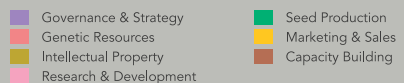
Leading the way is Nigeria-based Value Seeds, which, like most other index companies originating in the region, operates exclusively in its home country. A young, aspirational business, it has focused since its establishment in 2009 on laying the groundwork for future growth: setting up a country-wide distribution network, providing training and linking farmers to output markets. It is now actively involved in breeding and expects to release its own varieties shortly.

Technisem from France ranks second. It has the widest presence in the region, covering 17 countries and offering training in 13 of them. Through the Novalliance group, of which it is a leading member, it partners on breeding and marketing activities with various African seed companies. Three of these – Tropicasem, Semagri and Nankosem – also feature in the top ten.

In third and fourth place respectively, East-West Seed and Syngenta are, alongside Technisem, the only companies from outside the continent with breeding activities in the region. Tropicasem, from Senegal, and Maslaha Seeds, from Nigeria, are also active in research & development and are fifth and sixth. Seed Co, in seventh place, is the only pan-African seed company in the index. It recently started breeding activities in Ghana.

Companies at the lower end of the ranking generally disclose limited information or demonstrate few research and development activities.

#### 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

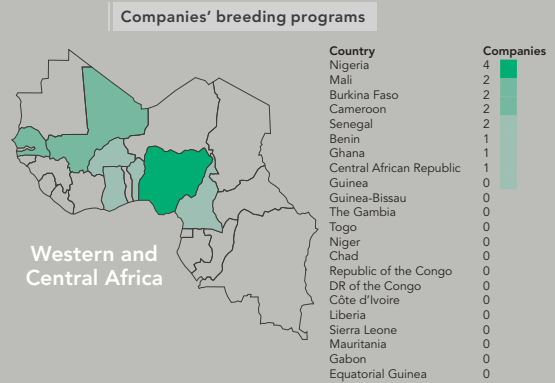
All results and background information is available online. The dedicated website contains more information on the ranking, the methodology and the key findings. For each company a separate scorecard is presented. For every country in scope an overview of seed company presence is available.

## 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.

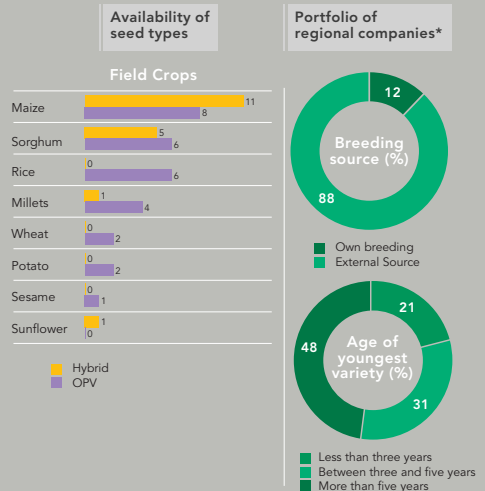
### Only half of the companies have breeding activities; no private sector breeding was found in 70% of the countries

Plant breeding is the core activity of many seed companies around the world, but this is not the case in Western and Central Africa. Only 11 of the 23 index companies conduct plant breeding. Three of these are Nigerian (Maslaha Seeds, Premier Seed, Value Seeds), one is from Mali (SOPROSA), three operate internationally (East-West Seed, Seed Co, Syngenta) and four are part of the Novalliance group (Nankosem, Semagri, Technisem, Tropicasem). In 15 of the 22 countries in scope (70%), no breeding by index companies was found.



### Large part of the youngest varieties in the portfolio of regional companies is older than five years; open-pollinated varieties dominate

Three regional seed companies report that their entire portfolio consists of varieties older than five years. Excluding Novalliance partner companies, 48% of the varieties offered are older than five years. Compared to regional companies in Eastern and Southern Africa, this is relatively high, likely a result of the small number of seed companies with their own breeding program. Meanwhile, global companies – all with active breeding programs – report that varieties younger than three years old make up 60% of the crops in their portfolio. Only for a few crops do more companies report selling hybrids than open-pollinated varieties. In field crops, this is only the case for maize.



# Company scorecards

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

### Value Seeds

Value Seeds is a seed-based support team focused on helping smallholder farmers in Africa to increase their yields and income. The company primarily focuses on maize and sorghum production but is increasingly focusing on other crops such as cowpeas. The company partners with government and non-governmental organizations in research and development.

**Access to Seeds Index**

2018 Index: 2.25  
2017 Index: 2.05

### Western and Central Africa

Value Seeds ranks the highest in the 2018 Index for Western and Central Africa. With robust programs in all measurement areas, the company collaborates with national and international non-governmental entities, governments and investors have enhanced its capacities and offerings. The company has a wide distribution network in Nigeria, the only country where it is active. Its collaboration with the Partnership for Eradication, Reform and Learn, funded by the UK's Department for International Development (DFID), has provided inputs and technical assistance to over 4,867 women smallholder farmers and youth, resulting in notable success in Capacity Building. Value Seeds is one of the few index companies to provide linkages to input markets for smallholder farmers, by aligning with feed and rice mills, food processors and poultry farms, among others. The company aims to reach 11 million smallholder farmers by 2025, a target reflected in its Governance & Strategy score. Similarly, Value Seeds demonstrates a high level of transparency compared to its regional peers. Although it is currently developing improved varieties of maize, the company can enhance its activities in Research & Development, including scope of crops in its pipeline and development activities related to the conservation and use of Genetic Resources.

### company profile

**Operational scope**

- Company active in 10 countries
- Company active in 10 countries

### Notable Findings

- Value Seeds is a member of the Technical Committee of the National Association of Agricultural Producers of Nigeria, which serves the activities of seed companies in the country. The committee members are responsible for advancing activities with government and generating an annual of the industry.
- The company collaborates with smallholder farmer groups such as the National Association of Agricultural Producers of Nigeria (NAAP) and the Nigerian Farmers' Association (NFA) to support and facilitate their activities.
- The company has a seed testing laboratory that is ISO 9001 certified and has a government capacity level, vigor and stability. The percentage detected by acceptability is 99%. These percentages are within the company and the National Seed Council's top tier as measured in the industry.
- The company provides input loans to women smallholder and non-governor farmers, and allows farmers to get back the loans in the form of improved products.
- Value Seeds reports that in the last five years it has increased its capacity to produce 100,000 metric tons of improved maize seed annually. Through its partnership with CIMMYT, IITA, and AVRDC, the company hopes to further the commercialization of drought and flood tolerant maize varieties along with other early maturing varieties to provide resilience to early droughts. The company also aims to expand farmer-to-farmer programs to increase the range of improved maize products.
- In collaboration with AVRDC, Value Seeds uses the Fertilizer Use Incentive Subsidy Program (FUSP) to provide fertilizer to smallholder farmers in a bulk-pack French and English seedling bags that increase farmer yields to increase their production based on local conditions. Depending on the location, environmental conditions, systems available on-farm (water, diesel, fuel, insecticide, etc.), the bags can help farmers maximize yields and/or reduce input and pest management while being a suitable marker.

### Leading practices

- Building on its growth since its incorporation, Value Seeds aims to reach 10 million smallholder farmers by 2025, building the pipeline to the country group through innovative technologies and by engaging more smallholder farmers in its largest territories.
- The company services remote areas by distributing seed at village level and providing on-farm leads in cash farming communities and collaborating with industry, farmer groups and governmental and non-governmental organizations. Further, the company distributes seed developed by farmers leading to local markets.
- The company includes programs on its seed pipeline to accommodate literacy smallholder farmers. Further, the company offers value for its maize and sorghum. These include all the inputs needed for crop production, such as fertilizers, herbicides of farming, facilitating adoption of high-yielding varieties, capacity building, training and generation smallholder farmers looking to grow crops for cash.

### Areas for improvement

- While the company has an in-house seed production and processing plant, it is currently unable to produce all the seed varieties it needs. The company is currently exploring options to increase further along its production pipeline, including the possibility of including a seed processing and packaging plant, and exploring the possibility of outsourcing of compliance and regulatory requirements to meet the needs of its customers.
- The company is currently seeking seed varieties that are more resistant to drought and other stresses. It is currently exploring options to increase further along its production pipeline, including the possibility of including a seed processing and packaging plant, and exploring the possibility of outsourcing of compliance and regulatory requirements to meet the needs of its customers.

### Portfolio information

Index crops in portfolio	Seed type	Source	Commercial	Non-commercial	Genetic	Research
Field crops						
Maize	Hybrid	Local	Yes	Yes	Yes	Yes
Sorghum	Hybrid	Local	Yes	Yes	Yes	Yes
Beans	Hybrid	Local	Yes	Yes	Yes	Yes
Cowpeas	Hybrid	Local	Yes	Yes	Yes	Yes
Vegetables						
Carrot			Yes	Yes	Yes	Yes
Cauliflower			Yes	Yes	Yes	Yes
Cucumber			Yes	Yes	Yes	Yes
Onion			Yes	Yes	Yes	Yes
Peas			Yes	Yes	Yes	Yes
Potatoes			Yes	Yes	Yes	Yes
Spinach			Yes	Yes	Yes	Yes
Tomatoes			Yes	Yes	Yes	Yes

### company presence

Value Seeds is a seed-based support team focused on helping smallholder farmers in Africa to increase their yields and income. The company primarily focuses on maize and sorghum production but is increasingly focusing on other crops such as cowpeas. The company partners with government and non-governmental organizations in research and development.

**Access to Seeds Index 2019**

2019 Index: 2.25  
2018 Index: 2.05

### Local crops in portfolio

Value Seeds is a seed-based support team focused on helping smallholder farmers in Africa to increase their yields and income. The company primarily focuses on maize and sorghum production but is increasingly focusing on other crops such as cowpeas. The company partners with government and non-governmental organizations in research and development.

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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.

### Senegal

Senegal is a seed-based support team focused on helping smallholder farmers in Africa to increase their yields and income. The company primarily focuses on maize and sorghum production but is increasingly focusing on other crops such as cowpeas. The company partners with government and non-governmental organizations in research and development.

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### the seed sector in Senegal

Further research and varietal improvement is largely driven by Senegal's research institutions in the form of the National Agricultural Research Institute (INRAT), which is the main research and production center and foundation seeds for all the major crops. The Division des Productions Agricoles (DPA) is the main research and production center and foundation seeds for all the major crops. The Division des Productions Agricoles (DPA) is the main research and production center and foundation seeds for all the major crops. The Division des Productions Agricoles (DPA) is the main research and production center and foundation seeds for all the major crops.

### Observations

There are no index companies in Senegal, but SEDAR and Trépassier are the only ones headquartered in the country. Only three companies provide extension services to farmers, and the only index companies in Senegal are SEDAR and Trépassier. The company partners with government and non-governmental organizations in research and development.

### country profile

Senegal is a seed-based support team focused on helping smallholder farmers in Africa to increase their yields and income. The company primarily focuses on maize and sorghum production but is increasingly focusing on other crops such as cowpeas. The company partners with government and non-governmental organizations in research and development.

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### key findings

Senegal is a seed-based support team focused on helping smallholder farmers in Africa to increase their yields and income. The company primarily focuses on maize and sorghum production but is increasingly focusing on other crops such as cowpeas. The company partners with government and non-governmental organizations in research and development.

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### company activities

Senegal is a seed-based support team focused on helping smallholder farmers in Africa to increase their yields and income. The company primarily focuses on maize and sorghum production but is increasingly focusing on other crops such as cowpeas. The company partners with government and non-governmental organizations in research and development.

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2019 Index: 2.25  
2018 Index: 2.05

### Other companies identified in the regional landscaping study and their activities

Company	Index Crops in Portfolio	Company activities in country
AGRIUM	Maize, Sorghum, Cowpeas	Seed production, extension services
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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 Sustainable Development Goals (SDGs).

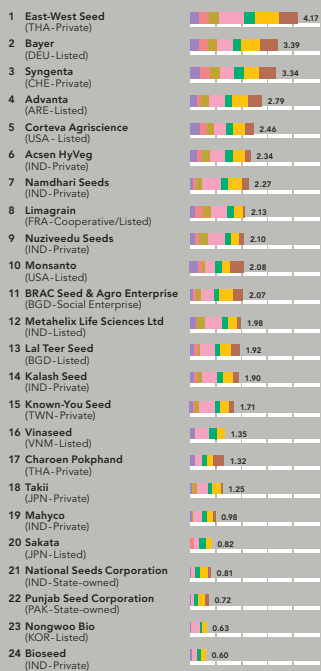
The Access to Seeds Index 2019 highlights different aspects of the seed industry. The Access to Seeds Index for Western and Central Africa focuses on 23 leading seed companies in this region. This was preceded by rankings of the industry in both Eastern and Southern Africa and South and Southeast Asia, along with a ranking of Global Seed Companies.

## Access to Seeds Index South and Southeast Asia



Published in  
November 2018

Ranking for the  
South and Southeast Asia Index

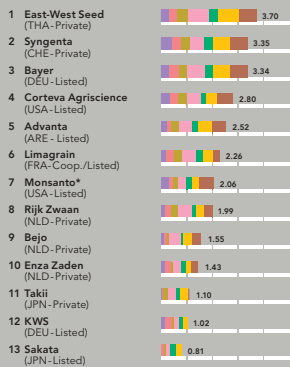


## Access to Seeds Index Global Seed Companies



Published in  
January 2019

Ranking for the  
Global Seed Companies Index



## Access to Seeds Index Eastern and Southern Africa



Published in  
March 2019

Ranking for the  
Eastern and Southern Africa Index

