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.

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.

www.accesstoseeds.org/index/western-central-africa
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.

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.

www.accesstoseeds.org/index/western-central-africa
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.

Senegal

The seed sector in Senegal

Senegal’s seed sector is organized and supported by the National Seed Institute, the Agricultural Research System, the Agricultural Development Agency, and the National Seed Program. The Ministry of Agriculture is responsible for seed development, while the National Seed Institute manages the seed sector and sets seed standards. The National Seed Institute has been responsible for establishing a national system for the production and certification of Seeds. The National Seed Institute has also implemented a system for promoting the development of the country’s seed sector. The National Seed Institute has established partnerships with research institutions and government agencies to promote the development of the seed sector.

Key findings

- The National Seed Institute has been responsible for establishing a national system for the production and certification of Seeds.
- The National Seed Institute has implemented a system for promoting the development of the seed sector.
- The National Seed Institute has established partnerships with research institutions and government agencies to promote the development of the seed sector.

Company activities

- The National Seed Institute has been responsible for establishing a national system for the production and certification of Seeds.
- The National Seed Institute has implemented a system for promoting the development of the seed sector.
- The National Seed Institute has established partnerships with research institutions and government agencies to promote the development of the seed sector.

Other countries studied in the regional landscaping study and their activities

Company

- The National Seed Institute has been responsible for establishing a national system for the production and certification of Seeds.
- The National Seed Institute has implemented a system for promoting the development of the seed sector.
- The National Seed Institute has established partnerships with research institutions and government agencies to promote the development of the seed sector.

www.accesstoseeds.org
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.

Published in November 2018
Ranking for the South and Southeast Asia Index

1. East-West Seed (THA-Private)
2. Syngenta (CHN-Private)
3. Bayer (DEU-Listed)
4. Corteva Agriscience (USA-Listed)
5. Advanta (ARE-Listed)
6. Limagrain (FRA-Cooperative/Listed)
7. Monsanto (USA-Listed)
8. Nuziweedu Seeds (IND-Private)
9. Bejo (NLD-Private)
10. Enza Zaden (NLD-Private)
11. Takii (JPN-Private)
12. KWS (DEU-Listed)
13. Sakata (JPN-Listed)

Published in January 2019
Ranking for the Global Seed Companies Index

1. East-West Seed (THA-Private)
2. Syngenta (CHN-Private)
3. Bayer (DEU-Listed)
4. Corteva Agriscience (USA-Listed)
5. Advanta (ARE-Listed)
6. Limagrain (FRA-Coop./Listed)
7. Monsanto* (USA-Listed)
8. Rijk Zwaan (NLD-Private)
9. Bejo (NLD-Private)
10. Enza Zaden (NLD-Private)
11. Takii (JPN-Private)
12. KWS (DEU-Listed)
13. Sakata (JPN-Listed)

Published in March 2019
Ranking for the Eastern and Southern Africa Index

1. East African Seed (KEN-Private)
2. Seed Co (ZAF-Listed)
3. East-West Seed (THA-Private)
4. Corteva Agriscience (USA-Listed)
5. Syngenta (CHN-Private)
6. Victoria Seeds (USA-Private)
7. NASECO (UGA-Private)
8. Equator Seeds (UGA-Private)
9. EABC (ETH-Private owned)
10. FICA Seeds (UGA-Private)
11. Techniseem (FRA-Private)
12. Pop-Vriend Seeds (NLG-Private)
13. Damater Seed (MWI-Private)
14. Kenya Seed Company (KEN-Private)
15. Monsanto* (USA-Listed)
16. Kenya Highland Seed (KEN-Private)
17. Capstone Seeds (ZAF-Private)
18. Klein Karoo Africa (ZAF-Private)
19. Zamseed (ZAM-Private)
20. Durusalam Seed Company (SOM-Private)
21. Starke Ayres (ZAF-Private)
22. Hydrotech (ZAF-Private)

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