

Quality Commercial Seed Production

Country: Kenya

	Profile Element	Response
1	Focus crops for assessment	<ol style="list-style-type: none"> 1. Maize 2. Potato 3. Pulses (beans) 4. Sorghum
2	Authorized seed classes in the country	Seeds and Plants Varieties Act 2012 specifies 8 seed classes in the Third Schedule: Breeder; Pre-basic; Basic; Certified (4 generations); Standard
3	Categories of key certified seed production entities (estimated share of total annual quality seed production volume)	(1) <u>Seeds and Plants Varieties Act 2012</u> defines Seed merchants as entities registered to produce, process and sell seed. Seed merchants account for 100% of quality seed in the country; and Seed growers as entities registered to grow seed. Seed merchants are sometimes referred to as Seed companies; while Seed growers are usually outgrowers of seed companies/merchants.
4	Categories of key QDS/other quality seed production entities (estimated share of total annual quality seed production volume)	No QDS production in Kenya. Standard seed is permitted under the Seed and Plant Varieties Act, but the modalities for its production are yet to be defined. The production of Standard seed is still at pilot stage.
5	Number of quality commercial seed production entities by categories listed above in #4 and #5	xx seed merchants registered by KEPHIS in 2021: 17 for maize, 13 for bean seed; 6 for cowpea seed; and 9 for sorghum seed. 30 seed merchants (companies) registered by KEPHIS for Irish potato and also members of NPCK. Unknown: Potato seed growers registered at the county level.
6	Industry concentration of certified seed producers for focus crops, and total market share of top 4 companies (from TASAI when available)	<u>HHI scores for 2019</u> : 3,261 (maize); 2,085 (bean), 3,797 (cowpea), 3,334 (sorghum). <u>Market share of top four companies</u> : 85% (maize seed); 84% (bean seed); 100% (cowpea seed); 83% (sorghum seed)
7	Estimate of annual planting material requirement for focus staple crops in MT (or cuttings) assuming seed that can be recycled is renewed after 3 seasons	Maize (54,723MT); Bean (17,216MT); Cowpea (1,076MT); Sorghum (732MT); Potato (117,501MT)

8	Estimate of quality assured seed production of focus crops in MT (or cuttings) for past 4 years, by seed class	Certified seed in 2019 (KEPHIS): 35,736MT (maize); 890 MT (bean); 342MT (cowpea); 78MT (sorghum). <u>Basic seed in 2019 (KEPHIS): 1,831.7MT (maize); 167.5MT (bean); 6MT (cowpea); 31.2MT (sorghum)</u>
9	Estimate of annual quality assured seed supply as a % of seed requirement for the past 4 years	Maize (65%); Bean (5%); Cowpea (32%); Sorghum (11%); Potato (6%)
10	Number of varieties, by focus crop, under commercial seed production.	Maize (67); Bean (22); Cowpea (6); Sorghum (9); Irish potato (13)
11	Percentage of hybrid maize seed to total maize seed supply for each of the last 4 years.	Missing information
12	Percentage of Imported seed to total annual seed supply for each of the last 4 years (for staple food crops)	2019: Maize (18%); Sorghum (3%). No imports for Bean or Cowpea seed in 2019
13	Name of seed trade association, number of total seed trade association members, number of active, paid-up members (If more than one seed trade association, list each separately)	Seed Trade Association of Kenya (STAK) had 44 members in 2021, of whom 5 are association members; NPCK has 9 Irish potato county platforms. The platforms consist of seed potato producers at county level Missing information: number of paid-up members of STAK
14	Advocacy effectiveness of seed trade association (TASAI data if available), and level of involvement in seed policy formulation	(1) STAK membership satisfaction ratings for 2020: 64% on effectiveness in advocacy; 74% in level of activeness on important seed sector issues. (2) STAK is heavily involved in all seed policy issues in the country. Of recent: (i) Successful rollback of the Certificate of Conformity (COC), which was a new requirement for imports; (ii) Lobby to the Kenya Bureau of Standards (KEBS) to classify vegetable seeds as seeds, not as spices, to remove additional VAT; (iii) Efforts to ensure that the movement of vehicles owned by seed companies were not restricted by the government movement lockdown caused by the Covid 19 pandemic in 2020/21

15	Key recent reforms in the sector meant to improve efficiency and increase volume of quality assured seed	Reforms in seed sector: (1) Automation of Seed certification and Plant Variety Protection systems by KEPHIS, launched in 2021. A number of key seed services are now automated; (2) Use of seed security labels on seed packaging materials, to curb counterfeit seed; (3) authorization of seed inspectors, seed inspection entities, seed analysts and seed laboratories. <u>Reforms unique to Irish potato seed sector:</u> (1) Passing of Crops (Irish potato) Regulations of 2019; (2) Publication of multiple manuals and guidelines for potato seed quality control including: Manual for potato seed multipliers; Guidelines for potato seed quality control; Guidelines for Potato storage, etc. (3) Formation of county potato platforms bringing together potato seed producers at county levels; (4) Setting up online market for potato seed on NPCK website; (5) Regular publishing of available volumes of certified potato seed (with details of sources) on NPCK website
16	Public agriculture infrastructure utilized to support seed production programs	Missing information on the infrastructure used by several entities that produce and market certified seed
17	Status of physical infrastructure (roads, electricity, buildings, irrigation) and general security in country	Percentage of paved roads to total national roads (26%); Percentage of households with access to electricity (70%); Percentage of arable land under irrigation (3%). Missing information on general security: US travel advisory places Kenya at level 2, "Exercise Increased Caution".