

Seed Markets & Distribution

Country: Kenya

	Profile Element	Response
1	Focus crops for assessment	<ol style="list-style-type: none"> 1. Maize 2. Beans 3. Cowpea 4. Sorghum
2	Number of farming HH in country, by size category if available	4,500,000 (about 80% said to be small holder farmers)
3	Law(s) and regulation(s) covering seed distribution (year of passage)	<ol style="list-style-type: none"> 1. Kenya Seed Policy, 2010 2. Seeds and Plant varieties Act (CAP 326) - 1991, revised 2012, amended 2016. 3. Seeds and Plant Varieties (Seeds) Regulations, 2016 4. COMESA Seed Trade Harmonization Regulations, 2014
4	Institution(s)/agency(ies) in charge of seed distributor registration, licensing and inspection	<ol style="list-style-type: none"> 1. Kenya Plant Health Inspectorate Service (KEPHIS) 2. County Agricultural Committee
5	Authorized commercial seed classes in the country and distribution channels permitted for each (e.g. direct sale by producer, retail, agents, farmer groups, etc.)	<ol style="list-style-type: none"> 1. Breeder Seed - direct sale by breeders to multiplying entities 2. Pre-basic - direct sale by breeders to multiplying entities 3. Basic - direct sale by breeder/multiplying entities to seed producers 4. Certified Seed - seed producers to farmers through agrodealers 5. Standard Seed- seed producer to farmers
6	Estimated volume of quality seed of focus crops sold through each channel	<p>Average annual seed sales - 50,000MT</p> <p>Agrodealers - 45,500MT</p> <p>Other channels (direct sales) - 4,500MT</p>
7	Number of registered distributors by category	<p>Hub agrodealers - 1,595</p> <p>Retail agrodealers 3,905</p>
8	Key requirements for registered/licensed seed distributors by category, including multiple licences	<ol style="list-style-type: none"> 1. Stockist: physical facility for proper seed storage, application fee of KES 1,500, Duly filled SR 12 form, Seed merchant appointment letter, County Agricultural Committee letter (not mandatory), annual subscription of KES 1000 2. Hub agrodealer: Physical facility for proper seed storage, seed merchant license, KES 30,000, County Agricultural Committee letter, annual subscription of KES 5,000

9	Estimated densities of registered distributors per region (very low, low, medium, high)	Areas/counties with high population density have higher numbers of agrodealers vice versa. Agrodealer mapping report supported by USAID in 2018 show densely populated counties of Kakamega and Bungoma to have 277 and 253 agrodealers respectively compared to nearly-same-size but less populated counties Kitui and Taita Taveta with 91 and 67 agrodealers respectively
10	Estimated general capacity of registered distributors by category (very low, low, good, very good)	Hub agrodealers (29%) said to have good capacity in terms of business management, purchasing power, access to credit, and transport compared to stockists who rates low in the above areas
11	Types of seed markets and distributors used for focus crops (estimated % share of total seed distribution for focus crop)	Agrodealer baseline study done in 2016 found that 100% of agrodealers stocked maize seed, 41% beans, 16% sorghum and 4% green gram. Seed is sourced from seed producers by hub agrodealers, who sell to stockists at discounted prices. Most farmers buy from stockists
12	Subsidy programs in last 5 years impacting distribution of seed for the focus crops	<ol style="list-style-type: none"> 1. Kenya Cereal Enhancement Programme- Climate Resilient Agricultural Livelihoods (KCEP-CRAL) in 14 counties, costing \$123.13million, 2015 - 2022 2. County specific seed subsidy programs; TASAI reported 29 out of 47 counties had seed subsidies in 2019
13	Name of seed distributor association and number of active, paid-up members	Kenya has 9 active county-based agrodealers associations (Bungoma, Kilifi, Busia, Kakamega, Kericho, Taita Taveta, Embu, Trans Nzoia and Makeni. Earlier initiatives by AGMARK to revive KENADA (national body) did not bear fruits.
14	Effectiveness of government extension efforts with distributors, and coverage in the country (very low, low, medium, high), with brief explanation	Ratio of government extension workers to farmers is reported to be low; 1:1120 There is little collaboration between extension workers and agrodealers
15	Government initiatives in place to address counterfeit seed at distributor level, e.g., scratch off labels, spot checks by regulator	<ol style="list-style-type: none"> 1. Strict requirements for registration as seed seller by KEPHIS 2. Constant surveillance by seed regulator 3. Introduction of Scratch Labels
16	Distributor management of carryover, dead stock and expired seed	Distributors are required, among other things, to have well-conditioned stores for proper seed storage. Upon expiry of seed stock, distributors liaise with seed producers for retesting
17	Public infrastructure in place to support seed distribution programs, e.g., warehouses	National Cereals and Produce Boards' warehouses are only available for government subsidy seed

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Status of road and telecommunications infrastructure and general security in country

- Has 19 telecom companies, including Safaricom, which has the highest market share for mobile data subscriptions
- Road networks comprise of 63,575 kilometers of classified roads with only 16,902 km (25%) paved
- Kenya has highest electricity access rate in East Africa at 75% both from grid and off-grid solutions, according to the recent Multi-Tier Framework Energy Access Survey Report.
- 59% of people in Kenya have access to safe drinking water, UNICEF 2020.
- General security is good with exception in Northern frontiers bordering Somali and Ethiopia