

Quality Commercial Seed Production

Country: Malawi

	Profile Element	Response
1	Focus crops for assessment	<ol style="list-style-type: none"> 1. Maize 2. Groundnut 3. Cassava 4. Bean
2	Authorized seed classes in the country	<p>Breeder, Pre-basic Basic</p> <p>Certified are defined in Seed Regulations of 2018. Quality Declared Seed (QDS) is defined in National Seed Policy of 2018.</p>
3	Categories of key certified seed production entities (estimated share of total annual quality seed production volume)	Seed growers are the only production entity, defined in the Regulations. Seed growers account for 100% of share of production of quality seed. They include seed companies and other entities (such as individual seed growers) who are usually contract outgrowers/ multipliers of seed companies
4	Categories of key QDS/other quality seed production entities (estimated share of total annual quality seed production volume)	Not applicable in Malawi
5	Number of quality commercial seed production entities by categories listed above in #4 and #5	24 registered seed companies in 2019. Number of individual seed growers/ farms/ cooperatives is not known, though some of these are listed in SSU Annual report. Note that cassava cuttings are produced and sold commercially by other entities such as individual growers, registered farms, or cooperatives.
6	Industry concentration of certified seed producers for focus crops, and total market share of top 4 companies (from TASA when available)	HHI scores in 2019: 4,967 for maize; 2309 for bean; 1,326 for groundnut. Market share of top four companies: Maize (91%); Bean (91%); Groundnut (65%)
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 (44,046MT); Bean (5,426MT); Groundnut (13,333MT); Cassava (Missing data).
8	Estimate of quality assured seed production of focus crops in MT (or cuttings) for past 4 years, by seed class	Certified seed production from SSU for 2018/19: Maize (17,498MT); Bean (886.04MT); Groundnut (899.76MT)

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9	Estimate of annual quality assured seed supply as a % of seed requirement for the past 4 years	Maize (40%); Bean (16%); Groundnut (7%)
10	Number of varieties, by focus crop, under commercial seed production.	Maize (31); Bean (6); Groundnut (5); Cassava (6)
11	Percentage of hybrid maize seed to total maize seed supply for each of the last 4 years.	Missing information for this indicator. SSU data does not distinguish between hybrid and OPV
12	Percentage of Imported seed to total annual seed supply for each of the last 4 years (for staple food crops)	Maize in 2019- 3%. Data from TASAI (seed imports as % of aggregate seed sales in 2019); Bean, Groundnut- 0%. No seed imports in 2019. Missing information: Import data for 2021 for all four crops
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 Malawi (STAM); 24 members in 2019. Missing information: (i) Number of paid-up members.
14	Advocacy effectiveness of seed trade association (TASAI data if available), and level of involvement in seed policy formulation	(1) <u>Member rating in 2020</u> : Advocacy effectiveness (71%); Level of engagement in important seed sector activities (79%) (2) <u>Involvement in policy formulation</u> : STAM very actively involved in seed policy discussions: Convenes regular meetings with government; keeps members UpToDate on status of policy instruments; has written position papers on policy issues including Harmonized Seed Regulations
15	Key recent reforms in the sector meant to improve efficiency and increase volume of quality assured seed	(1) Adoption of Seed Regulations of 2018, which focuses on all aspects of seed quality assurance; (2) Adoption of online seed certification system by SSU; (3) Seed company training and strict adherence to registration requirements; (4) SSU training seed companies on seed quality management systems (was to start in August 2021); (5) Training and licensing of agricultural extension officers to conduct seed inspection services; (6) Use of scratch card label on seed packages to curb fake seed
16	Public agriculture infrastructure utilized to support seed production programs	ISTA-accredited seed laboratory at the Chitedze Research station. The laboratory issues Orange International Certificates for companies intending to export seed; In addition, there are 3 satellite seed laboratories at Lunyangwa, Lifuwu and Bvumbwe.
17	Status of physical infrastructure (roads, electricity, buildings,	Percentage of paved roads to total national roads (25%); Percentage of households with access to electricity (15%); Percentage of households using irrigation (<1%)

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