

## Seed Markets & Distribution

### Country: Malawi

	Profile Element	Response
1	Focus crops for assessment	<ol style="list-style-type: none"> <li>1. Maize</li> <li>2. Groundnuts</li> <li>3. Beans</li> <li>4. Soybean</li> </ol>
2	Number of farming HH in country, by size category if available	4,000,000 (IFPRI 2021)
3	Law(s) and regulation(s) covering seed distribution (year of passage)	<ol style="list-style-type: none"> <li>1. Seed Regulations, 2018</li> <li>2. National Seed Policy, 2018</li> <li>3. Seed Act 1996 (in use but under repeal)</li> <li>4. COMESA Seed Trade Harmonization Regulations, 2014</li> <li>5. Southern African Development Community (SADC) Harmonized Seed Regulations, 2013</li> </ol>
4	Institution(s)/agency(ies) in charge of seed distributor registration, licensing and inspection	Seed Services Unit (SSU), under the Department of Agricultural Research Services (DARS) in the Ministry of Agriculture.
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"> <li>1. Breeder Seed (DARS, CGIAR, Seed Producers)- direct sale to multipliers</li> <li>2. Pre-basic Seed - direct sale to multipliers</li> <li>3. Basic Seed - direct sale to seed companies</li> <li>4. Certified Seed - sale through subsidies (agrodealers, direct)</li> <li>5. Quality Declared Seed (QDS) - 10% inspected - direct sale to farmers</li> </ol>
6	Estimated volume of quality seed of focus crops sold through each channel	Average of <b>20,000MT</b> of certified seed sold annually as follows: Agrodealers under subsidy - 80%, agrodealers outside subsidy - 10%, direct sale to large scale farmers - 6%, direct sale to SHF - 3%, others - 1%
7	Number of registered distributors by category	TASAI states 1,565 are officially registered with SSU, although the National Association of Agrodealers says it has over 6,000.
8	Key requirements for registered/licensed seed distributors by category, including multiple licences	Registration by Seed Traders Association of Malawi Registration by Seed Services Unit
9	Estimated densities of registered distributors per region (very low, low, medium, high)	STAM website has a list of 2,389 registered agrodealers estimated to serve 4 million households; 1:1,675. The many number of unregistered agrodealers means many households are served by unregulated distributors.
10	Estimated general capacity of registered distributors by category (very low, low, good, very good)	Agrodealers are the main outlets for certified seed distribution with reports indicating over 6,000, most of who are located near tarmac roads and in trading centres. Few agrodealers are in rural areas

11	<b>Types of seed markets and distributors used for focus crops (estimated % share of total seed distribution for focus crop)</b>	<b>Seed distribution channels in 2019</b>					
			<b>Maize</b>	<b>Beans</b>	<b>Groundnut</b>	<b>Soybean</b>	<b>Average</b>
		<b>FISP</b>	37	33	27	32	<b>32.25</b>
		<b>Agrodealer</b>	25	15	14	13	<b>16.75</b>
		<b>Farmers</b>	13	15	23	16	<b>16.75</b>
		<b>NGOs</b>	6	22	16	21	<b>16.25</b>
<b>Others</b>	18	16	20	18	<b>18</b>		
12	<b>Subsidy programs in last 5 years impacting distribution of seed for the focus crops</b>	<ol style="list-style-type: none"> <li>1. Farm Inputs Subsidy Program - 2016 to 2020</li> <li>2. Affordable Inputs Program (AIP) - 2020 to date</li> </ol>					
13	<b>Name of seed distributor association and number of active, paid-up members</b>	National Agrodealers Association said to have 6,000 members with only 2,632 being active					
14	<b>Effectiveness of government extension efforts with distributors, and coverage in the country (very low, low, medium, high), with brief explanation</b>	In 2019, TASAI reported 1604 frontline extension officers serving estimated 3.4million households. There is, however, no evidence of extension workers working directly with agrodealers					
15	<b>Government initiatives in place to address counterfeit seed at distributor level, e.g. scratch off labels, spot checks by regulator</b>	<ol style="list-style-type: none"> <li>1. Routine visit by SSU inspectors to seed company warehouses and agrodealer shop (law allows for confiscation of fake seed)</li> <li>2. Scratch Label pilot on seed packets has been undertaken in the current 2021/22 growing season</li> <li>3. New proposed Seed Bill has heavier penalties on dealers in fake seed</li> </ol>					
16	<b>Distributor management of carryover, dead stock and expired seed</b>	The Seed Regulations (2018) for Malawi stipulate that all unsold seed at the end of the marketing season should be returned and repackaged. Seed companies are said to adhere to this requirement					
17	<b>Public infrastructure in place to support seed distribution programs, e.g. warehouses</b>	No evidence for public infrastructure support for distribution					
18	<b>Status of road and telecommunications infrastructure and general security in country</b>	<p>Lacks efficient, fixed-telecom infrastructure (among the least in the world)</p> <p>Only 26% (4000km) of the country's 15,000km trunk roads is paved</p> <p>Generally peaceful landlocked country and with stable governments since independence in 1964</p>					