Seed Markets & Distribution

Country: Uganda

	Profile Element	Response
1	**Focus crops for assessment**	1. Maize 2. Rice 3. Beans 4. Sorghum
2	**Number of farming HH in country, by size category if available**	6.1 million (Uganda National Survey Report 2019/2020), with each HH owning 1.35ha (UBOS, 2018)
3	**Law(s) and regulation(s) covering seed distribution (year of passage)**	1. National Seed Policy of Uganda, 2018 2. Seed and Plant Variety Regulations, 2010 3. Seeds and Plant Act, 2006 4. Uganda National Seed Strategy, 2015
4	**Institution(s)/agency(ies) in charge of seed distributor registration, licensing and inspection**	Nation Seed Certification Service, under the Department of Crop Inspection and Certification in MAAIF
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.)**	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. QDS - Local Seed Businesses to farmers
6	**Estimated volume of quality seed of focus crops sold through each channel**	Average annual seed sales - 30,000MT Currently (2022), Uganda has 5 National Telecom operators: MTN Uganda Ltd, Airtel Uganda Limited, UTL, Tangerine T/a Lyca Mobile and National Information and Technology Authority NITA-U and 14 Public telecom infrastructure providers licensed by the Uganda Telecommunication Commission (UCC website 2022). As of 31 March 2017, Uganda had the 18th highest Internet usage rate in Africa (out of 58 countries). Generally secure country in the Eastern, central and Southern parts. The northern parts bordering Sudan and DRC experience flashes of insecurity due to the presence of Rebel Groups in those countries 1. Agrodealers - (21%) 6,300MT 2. Government subsidy (OWC) - (29%) 8,700MT 3. NGOs - (48%) 14,400MT 4. Direct sales - (7%) 2,100MT
7	**Number of registered distributors by category**	1. Hub agrodealers - N/A 2. Retail agrodealers - N/A

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<tr><td>8</td><td>Key requirements for registered/licensed seed distributors by category, including multiple licences</td><td>1. Physical facility for proper seed storage
2. Application to Agricultural Chemical Control Board following the guidelines in the Seed and Plant Regulations of 2017
3. Proof of knowledge of agro inputs (where unsatisfactory, a mandatory tailored training by Makerere is undertaken)</td></tr>
<tr><td>9</td><td>Estimated densities of registered distributors per region (very low, low, medium, high)</td><td>Reports show fair concentrations of agrodealers in urban centres and few in rural areas</td></tr>
<tr><td>10</td><td>Estimated general capacity of registered distributors by category (very low, low, good, very good)</td><td>TASAI reports very high ratio of registered agrodealers to farming households at 1:10,000.</td></tr>
<tr><td>11</td><td>Types of seed markets and distributors used for focus crops (estimated % share of total seed distribution for focus crop)</td><td><table>
<tr><th colspan="6">Percentage seed distribution via channels in 2019</th></tr>
<tr><th>Distribution channel</th><th>Maize</th><th>Beans</th><th>Sorghum</th><th>Millet</th><th>Total average</th></tr>
<tr><td>NGOs</td><td>31</td><td>49</td><td>75</td><td>17</td><td>43</td></tr>
<tr><td>OWC/NAADS</td><td>32</td><td>28</td><td>22</td><td>19</td><td>25</td></tr>
<tr><td>Agrodealers</td><td>25</td><td>20</td><td>25</td><td>20</td><td>23</td></tr>
<tr><td>Direct sales</td><td>8</td><td>9</td><td>16</td><td>4</td><td>9</td></tr>
</table></td></tr>
<tr><td>12</td><td>Subsidy programs in last 5 years impacting distribution of seed for the focus crops</td><td>Operation Wealth Creation, spearheaded by National Agricultural Advisory Services and the military supplies over 25% of seed purchased directly from seed producers to farmers. There are numerous reports of low-quality seed supply under the program, corruption as well as delays in government payment of seed producers.</td></tr>
<tr><td>13</td><td>Name of seed distributor association and number of active, paid-up members</td><td>Uganda National Agrodealers Association (UNADA).
• 2009 census indicated a total of 2,064 but only 551 (27%) were registered.
• Another census in 2015 showed 1,167 as having been duly registered although reports show between 2500 and 3,000 agrodealer shops were in operation in 2017.
• TASAI reports a membership of 725 in 2019</td></tr>
<tr><td>14</td><td>Effectiveness of government extension efforts with distributors, and coverage in the country (very low, low, medium, high), with brief explanation</td><td>Ratio of government extension workers to farmers is reported to be low; 1:1800 in 2019 according to MAAIF (MAAIF Website 2022)
There is little collaboration between extension workers and agrodealers</td></tr>
<tr><td>15</td><td>Government initiatives in place to address counterfeit seed at distributor level, e.g., scratch off labels, spot checks by regulator</td><td>1. E-verification supported by USAID said to have stopped in 2018
2. Constant surveillance and awareness creation by seed regulator. Donor supported Ag-verify project (private seed verification initiative) did not get government back up</td></tr>
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		3. There are no plans for scaling QDS to certified commercial seed production, instead some unscrupulous seed producers get QDS seed into certified seed market 4. Quality Control and Quality Assurance by the seed producers and the government are weak 5. There are weak national policies and limited capacity of inspection and enforcement as well as corruption (MAIIF, 2020)
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. However, enforcement of this is weak due to limited capacity levels (staff and other resources) at the responsible entity-Directorate of Seed Inspection
17	**Public infrastructure in place to support seed distribution programs, e.g., warehouses**	No evidence for public infrastructure support for storage except for subsidy programs
18	**Status of road and telecommunications infrastructure and general security in country**	Currently (2022), Uganda has 5 National Telecom operators: • MTN Uganda Ltd, • Airtel Uganda Limited, • UTL, • Tangerine T/a • Lyca Mobile and National Information and Technology Authority NITA-U and 14 Public telecom infrastructure providers licensed by the Uganda Telecommunication Commission (UCC website 2022). As of 31 March 2017, Uganda had the 18th highest Internet usage rate in Africa (out of 58 countries). Generally secure country in the Eastern, central and Southern parts. The northern parts bordering Sudan and DRC experience flashes of insecurity due to the presence of Rebel Groups in those countries