

DATASETS ON AFRICA SEED SECTOR

Datasets that provide an updated summary of Africa’s seed sector are not readily available; CESSA is well positioned to provide a biannual update in partnership with other African organizations to curate and host data resources on CESSA.

African Union Commission engaged AGRA to work with [TASAI](https://www.tasai.org/en/2024/02/13/sspi-new-year-update/)¹ to develop a Seed Sector Performance Index (SSPI) <https://www.tasai.org/en/2024/02/13/sspi-new-year-update/>² and metrics for CAADP to measure the health of the seed system across Africa every two years, starting in 2023. The SSPI provides input into the 4th Biennial Review report of the Comprehensive Africa Agriculture Development Programme (CAADP). The index uses 17 indicators to measure the health of national seed sectors in Africa, a useful resource to fill in existing data gaps. Forty-seven African Union member states responded to the call for data collection. The report contains detailed descriptions of the research methods, the findings by indicator, as well as individual profiles of each participating country, and will be used as a mutual accountability framework by African Union member states. It aims towards having a Single Score Measurement of Formal Seed Sector in African Countries, that provides “Bird’s Eye View” of the ability of seed systems to meet farmers’ needs across Africa.

AGRA employed the Seed Systems Assessment Tool (SEEDSAT) <https://cessa.agra.org/analysis/>³ approach has assessed the health status of 11 focus countries to identify bottlenecks and areas for catalytic interventions to spur changes in the seed systems of these countries. The assessment took place in 2022-2023. The objective of SeedSAT is to understand ongoing activities, identify need areas, address bottlenecks and design improvements for ongoing investments and their implementation. SeedSAT has facilitated the identification of unique opportunities for catalytic interventions on a need basis. The seed system encompasses various institutions addressing issues along the 8 thematic areas, and outlines specific recommendations for each country across the 8 thematic areas assessed

The [TASAI Dashboard](https://dashboard.tasai.org/#/en/dashboard/country-overview/)⁴, launched in 2022 is a significant data resource , addressing data availability on the seed sector for Africa, which is still limited. FAO-STAT does not capture seed production, demand, or trade as it does for fertilizers and pesticides. In part, data is unavailable due to the poor visibility most countries have on seed production. ASTI presents scorecards for select seed companies that highlight a company’s strengths and weaknesses, presence and portfolio, leading practices, and notable findings in Eastern, Southern, and Western Africa. It does not cover all seed sector actors in each country. The AUC-Seed sector Plan 2020-2030 has attempted to develop a database on various seed system aspects from the data available from TASAI and other initiatives in Africa. The IHS Markit – [Africa Seed Profiles 2021](https://cdn.ihsmarkit.com/www/prot/pdf/0322/IHSMarkit-Crop-Science-Africa-Seed-Profiles-2021-MARKETING.pdf)⁵ emphasizes vegetable seeds. Respective CGIAR Centers report on seed production estimates for their mandate crops but these have not been updated and do not report estimated seed production by variety and country.

¹ <https://www.tasai.org/en>

² <https://www.tasai.org/en/2024/02/13/sspi-new-year-update/>

³ <https://cessa.agra.org/analysis/>

⁴ <https://dashboard.tasai.org/#/en/dashboard/country-overview/>

⁵ <https://cdn.ihsmarkit.com/www/prot/pdf/0322/IHSMarkit-Crop-Science-Africa-Seed-Profiles-2021-MARKETING.pdf>

The following sections present highlights from these initiatives, from which CESSA can conduct analysis to indicate gaps in information and develop a process of continuously assembling data on the African seed sector for use by different stakeholders.

1. TASAI country seed sector summaries

Countries, where seed sectors have been documented, [include](#)⁶: **Burkina Faso**, **DRC**, **Ethiopia**, **Ghana**, **Kenya**, **Malawi**, **Mali**, **Mozambique**, **Nigeria**, **Rwanda**, Senegal, South Africa, **Tanzania**, **Uganda**, Zambia, and Zimbabwe (bold indicates an AGRA priority country. Each summary includes links to seed companies in each country. CESSA should consider directing users to the link of the corresponding priority country once the website is operational.

2. Seed company score cards by the World Benchmarking Alliance (WBA) Access to Seed Index (ATSI).

The World Benchmarking Alliance's (WBA) mission is to build a movement to measure and incentivize business impact towards a sustainable future that works for everyone. It envisions a society that values the success of the business by what it contributes to the world. The WBA food and agriculture Access to Seeds Index (ATSI) measures and compares the efforts of the world's leading seed companies to enhance the productivity of smallholder farmers.

The Annual index seeks primarily to identify leadership and good practices, providing an evidence base for the discussion on where and how the seed industry can improve its efforts. Private sector engagement is at the heart of the Sustainable Development Goals (SDGs) adopted by the United Nations in 2015. By creating a better understanding of the seed industry's performance, the index aims to contribute to the achievement of these goals.

Hunger is a daily reality for almost one billion people around the world. The global population is expected to grow by a further two billion in the coming decades, precisely in those regions that are currently considered food insecure. Improving access to seeds for farmers in those regions is key to meeting future food demands. This is where the seed industry can play a crucial role.

The index presents scorecards for each of the companies that highlight a company's strengths and weaknesses, presence and portfolio, leading practices, and notable findings.

Access to Seeds Index publishes biennial indices for global seed companies, in eastern and southern Africa, western and central Africa, and south and southeast Asia. It has published 3 indices in 2016, 2019, and 2021. See the indices here <https://www.accesstoseeds.org/>

⁶ <https://www.tasai.org/en/products/country-reports/>

3. CGIAR Research Centers

CGIAR Centers report on seed production estimates for hybrids, lines, and OPVs. CIMMYT offers the best example of Certified Seed Production in Maize by CIMMYT across Africa.

Certified Seed Production of CGIAR-related stress-tolerant maize varieties (2016-2021)							
Region	Country	2016	2017	2018	2019	2020	2021
		MT	MT	MT	MT	MT	MT
Eastern Africa							
	Kenya	2,536	4,900	6,811	8,009	9,909	4,272
	Uganda	4,335	6,122	9,317	11,224	12,606	5,833
	Ethiopia	9,804	5,158	6,065	21,423	23,889	23,300
	Tanzania	2,362	2,688	3,309	3,122	6,522	7,232
	EA Sub-Total	19,038	18,868	25,502	43,778	52,926	40,637
Southern Africa							
	Zambia	11,176	10,236	6,325	7,228	10,164	46,894
	Malawi	5,912	4,707	7,732	8,100	4,709	13,105
	Mozambique	1,266	2,527	1,917	2,536	2,590	1,180
	Zimbabwe	7,260	8,648	9,353	8,849	21,070	23,241
	South Africa	-	-	-	3,300	-	3,393
	SA Sub-Total	25,614	26,118	25,327	30,013	38,533	87,813
West Africa							
	Benin	1,623	1,194	1,681	1,681	1,531	1,640
	Ghana	1,893	913	2,393	3,832	2,584	3,373
	Mali	2,641	3,903	3,008	2,572	2,074	250
	Nigeria	21,529	29,219	29,339	28,623	36,612	37,414
	WA Sub-Total	27,686	35,229	36,421	36,708	42,801	42,677
	SSA GRAND TOTAL	72,337	80,215	87,249	110,499	134,260	171,127

NOTE: The above data shows data only for post-2007 varietal releases. This also does not include CGIAR-related improved maize seed produced and commercialized outside these 13 AGG-Maize target countries in SSA. Source CIMMYT

4. African Union Commission-Department of Rural Economy and Agriculture Seed Sector plan 2020-2030

[The Seed Sector in Africa: 10-year plan \(2020-2030\) can be accessed HERE⁷](#). Data reported in 2021 was largely collected by TASAI and included:

1. Varieties released,
2. Seed sold (maize, rice),
3. Number of seed companies per country and ownership,
4. Sales in metric tons (maize, rice),
5. Number of days to import seeds,
2. Percent seed sold as subsidy,
3. Satisfaction of seed trade association,
4. Number of HH per agrodealer,

⁷ https://au.int/sites/default/files/documents/41357-doc-Africa_Seed_Industry_Report_summary_April_2020_submFeb2021_a_signed_and_posted_202111.pdf

5. Seed-to-grain price ratio (e.g., hybrid maize South Africa at 34:1, Zambia at 13:1, Rwanda at 10:1, and Zimbabwe at 9:1 compared to Malawi at 4.2:1).

Note Outputs of AUC-PP to Strengthen Seed Production Systems:

1. African organizations and institutions and locations for specialized seed production identified and promoted,
2. Informal seed sector mainstreamed, availability of seed at the regional level improved,
3. National seed production systems strengthened,
4. Establishment and development of community-based breeding and conservation programs,
5. Availability of early-generation seeds for multiplication improved,
6. Strategies developed for improved seed marketing and distribution.

5. IHS Markit

[Africa Seed Profiles 2021](#)⁸– The emphasis is on vegetable seeds. Requires a subscription to access the data. Captures data on vegetable seed production, import, and sales.

Key takeaways from datasets

- Seed systems datasets are weak and should be centralized to help a wide range of actors. It is notable that FAOSTAT does not report seed production nor seed export data. It is only TASAI that offers data on country seed systems.
- There is a clear lack of harmonization of seed data collection within and across countries, a fact that limits investments in the seed sector due to poor understanding of seed gaps by crop.
- CESSA should take a leading role in data collection, curation and dissemination on seed system

CESSA shall prioritize data collection in African countries by designing and socializing a standard template with national governments to capture key seed production metrics by crop. These data can inform insights and actions for policy development and investment. Digital tools to be hosted on CESSA can support data collection, curation and sharing.

CESSA targets to promote real-time data collection, curation and reporting as well as incentivize open data and sharing through its grants and explore mechanisms to aggregate company seed production to obtain accurate estimates of total seed production by crop for each country.

Let us know if there are topics not covered in the RTB Toolkit that one would like AGRA to develop to support your seed enterprise by contacting us on: <https://cessa.agra.org/contacts/>⁹

⁸ <https://cdn.ihsmarket.com/www/prot/pdf/0322/IHSMarket-Crop-Science-Africa-Seed-Profiles-2021-MARKETING.pdf>

⁹ <https://cessa.agra.org/contacts/>