



Presented by **Mainza Mugoya**

Workshop measuring Seed Sector Performance

25th October 2016, Abidjan, Ivory Coast



Background - Objective

Objective: TASAI seeks to promote the creation and maintenance of enabling environments for competitive seed systems serving African farmers. It is this enabling environment that TASAI seeks to measure, track, and compare across African countries.



TASAI Indicators

A. REASEARCH AND DEVELOPMENT	Crop Specific	Impact on Seed Access
1. Number of active breeders	Yes	+
2. Number of varieties released in the last 3 years	Yes	+
3. Availability of foundation seed	Yes	+
B. INDUSTRY COMPETITIVENESS		
4. Number of active crop seed companies	Yes	+
5. Time it takes to import seed from neighboring countries	No	-
6. Market share of top 4 companies	Yes	-
7. Market share of current or past government parastatal	Yes	-
C. SEED AND POLICY REGULATIONS		
8. Length of variety release process	Yes	-
9. Quality of seed policy framework	No	+
10. Quality of regulatory system	No	+
11. Adequacy of seed inspectors	No	+
12. Efforts to stamp out fake seed	No	+
D. INSTITUTIONAL SUPPORT		
13. Availability of extension services for smallholder farmers	No	+
14. Quality of national seed trade association	No	+
E. SERVICE TO SMALLHOLDER FARMERS		
15. Concentration of rural agro-dealer network	No	+
16. Availability of seed in small packages	Yes	+

TASAI - Additional Indicators (2015-

INDICATOR	CROP SPECIFIC	IMPACT ON SEED ACCESS
Average age of varieties sold	Yes	-
Varieties released with climate-smart features	Yes	+
Use of smart subsidies (size & value; duration; distribution; targeting; % price subsidy)	No	+
Seed to grain price ratio	Yes	+
Availability of ISTA-accredited laboratory	Yes	+

Methods

- TASAI is built on in-depth country studies conducted by local experts (universities and seed sector consultants).
- It measures the top four crops that are important to food security.
- Focus on formal seed sector
- Industry opinions are graded as follows:

Score	Grade	Interpretation / Rating
80 to 100	A	Excellent
60 to 79.99	B	Good
40 to 59.99	C	Fair
20 to 39.99	D	Poor
0 to 19.99	F	Extremely poor

COUNTRY PROFILE			KENYA		UGANDA	
			2013	2015	2013	2015
Focus crop 1			Maize	Maize	Maize	Maize
Focus crop 2			Sorghum	Sorghum	Sorghum	Sorghum
Focus crop 3			Beans	Beans	Beans	Beans
Focus crop 4			Cowpeas	Cowpeas	Millet	Millet
A. RESEARCH AND DEVELOPMENT						
1.	Number of active breeders	Total	68	63	11	12
2.	Varieties released in last 3 years	Total	60	80	19	22
		3-year average	20	26.7	6.3	7.7
3.	Availability of foundation seed	Score	61.3	6	42.8	5.2
B. INDUSTRY COMPETITIVENESS						
4.	Number of active crop seed companies for focus crop only	Total	17	22	14	13
5.	Time it takes to import/export seed from neighboring countries (days)	Import seed	26	38	48	6
		Export seed	12	14	18	9
6.	Market share of top 4 companies, Herfindahl-Hirschman Index	Crop 1	6,450	5,438	1,509	1,317
		Crop 2	1,989	4,576	1,050	2,483
		Crop 3	3,223	2,472	950	1,269
		Crop 4	3,240	3,505	1,350	6,401
C. SERVICE TO SMALLHOLDER FARMERS						
7.	Concentration of rural agro-dealer network	Number of agro-dealers		5,240	2,064	1,167
8.	Availability of seed in small packages	% volume sold	94.4	90	29.1	32.5
D. SEED POLICY AND REGULATIONS						

3. Availability of Foundation Seed (2013) (Industry opinion – score out of 100)

	Kenya		South Africa		Uganda		Zimbabwe	
Crop 1	Maize	67	Maize	100	Maize	68	Maize	97
Crop 2	Sorghum	65	Soybean	100	Beans	50	Cotton	100
Crop 3	Beans	62	Sunflow	100	Millet	18	Soybean	100
Crop 4	Cowpeas	51	Wheat	65	Sorghum	35	Sorghum	100
Average		61.3		91.3		42.8		99.3
Interpretation	Good		Excellent		Fair		Excellent	

- Seed companies in South Africa and Zimbabwe maintain their own foundation seed, as well as many companies in Kenya.
- Most seed companies in Uganda and some companies in Kenya rely on public sector for foundation seed

Sample of TASAI (2015) findings

TASAI indicator	Kenya		Uganda	
	2013	2015	2013	2015
Length of variety release (months)	37	33	37	19.5
Adequacy of seed inspectors (no.)	60	64	5	6
No. of active breeders (4 crops)	68	63	11	12

- Seed released in Uganda (2015) was from EAC – only 2 seasons of tests (likely reason)
- Decentralize seed inspection to zones & districts (Revised Ug. Seed Policy)
- 23 private breeders (Ky); 1 in Uganda

Dissemination

- Country presentations
- Country briefs
- Media coverage
- Website & Social media
- Newsletter (Nov –
- Country information portals

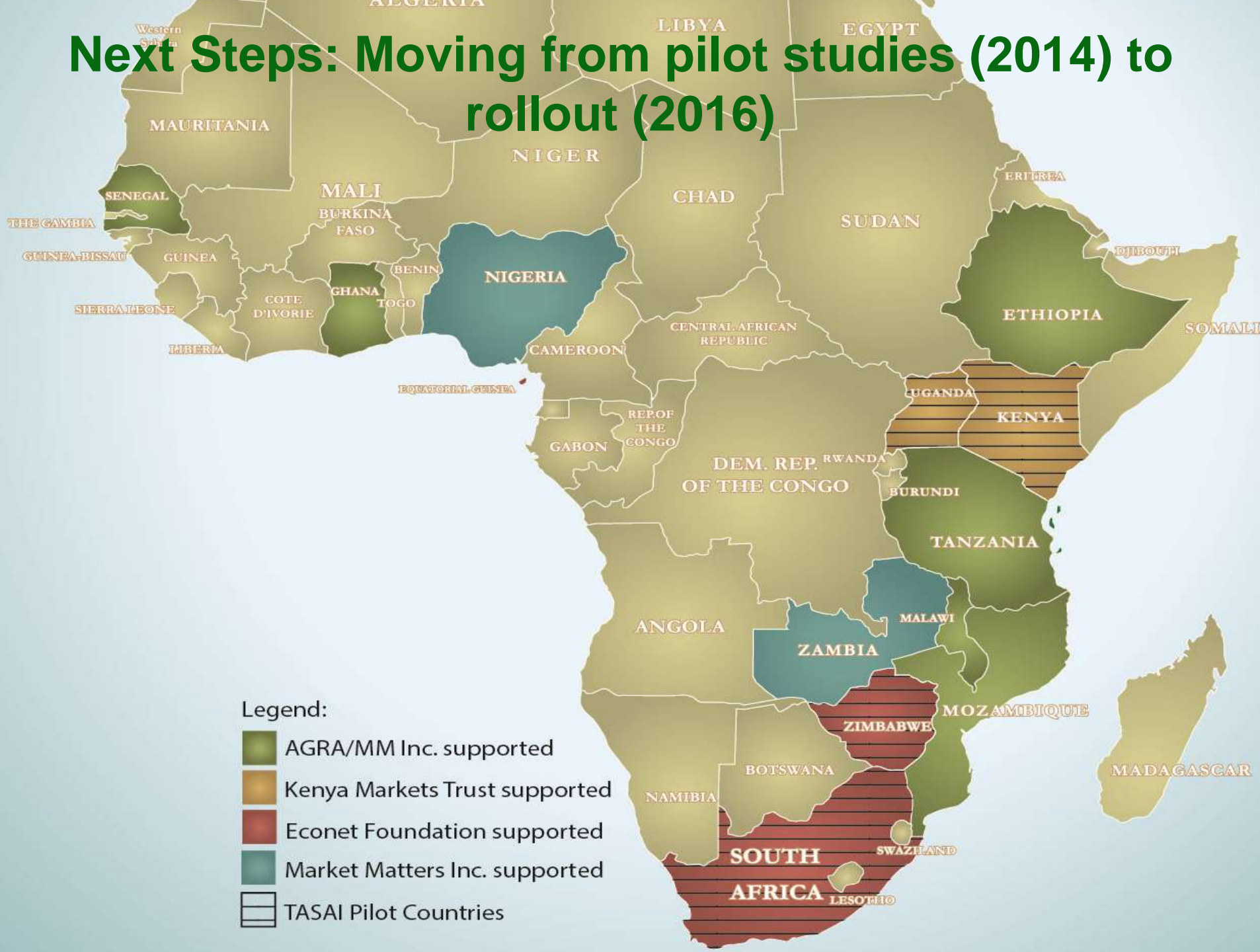


Kenya Brief,
March 2015



Towards competitive seed systems serving smallholder farmers

Next Steps: Moving from pilot studies (2014) to rollout (2016)



Next Steps:

COMESA Seed Information Systems (COMSIS)

ISSD, TASAI, ReSAKSS Partnership

- Work in progress
- TASAI – industry performance
- ISSD – end user (farm level surveys)
- Plan to combine existing tools (with modification) to set up comprehensive seed information system (including monitoring COMSHIP progress) for COMESA





TASAI

THE AFRICAN SEED ACCESS INDEX

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