

Seed Company Survey and Analysis – Sub-Saharan Africa

Introduction

This survey was undertaken by Agri Experience at the 10K seed company meeting held in Accra, Ghana in November 2018, hosted by the Alliance for a Green Revolution in Africa (AGRA). A copy of the questionnaire distributed to the seed companies in attendance is attached. An analysis of the responses is provided below. (Note that not all seed companies answered all questions, or provided useable replies to all questions.)

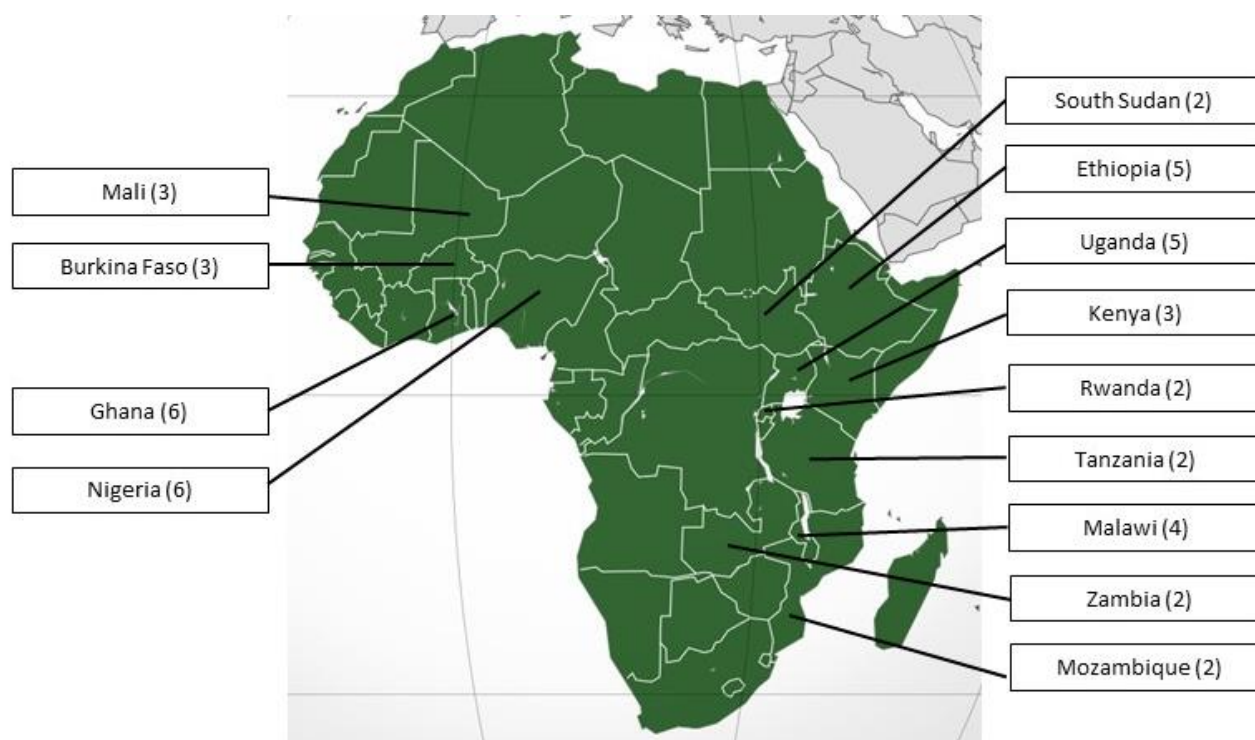
The summary below is organized into five sections:

- I. Company footprint
- II. Variety turnover
- III. Early generation seed
- IV. Retail distribution
- V. Business environment

I. Company footprint

Countries

Attendees represented seed companies from 13 different countries, as shown in the map below. One seed company did not indicate its country of origin. All of the seed companies surveyed were either national or regional companies.



As expected, the seed companies all sell in their own countries, but many also sell in other countries, primarily COMESA, SADC and EAC regional blocks. It was interesting to note that all the seed companies from Ethiopia, Mozambique, Rwanda, South Sudan and Tanzania did not sell outside their home countries.

Crops

Figure 1: Number of companies selling seed of each crop (N=46)

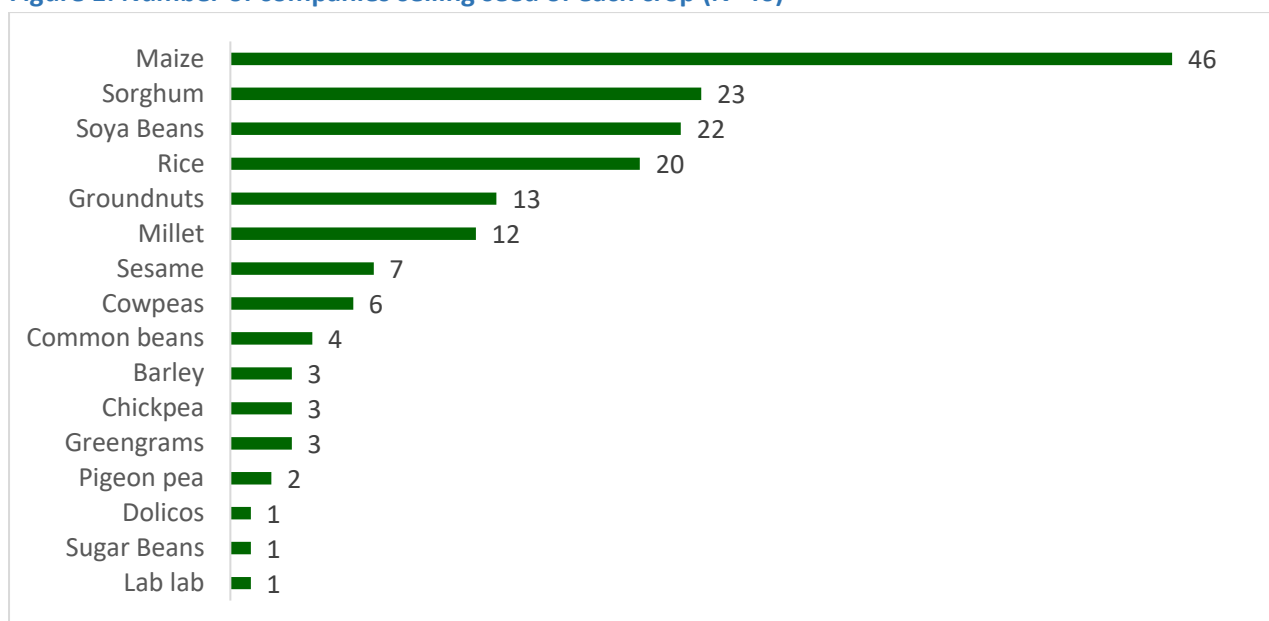


Table 1: Number of crops for which seed is sold (N=46)

	1 crop	2-3 crops	4-5 crops	5+ crops
# of seed companies	8	6	17	15

Size

Table 2: Size of company by average annual sales (N=44)

	Below 200 MT	201-500 MT	501-1,000 MT	1,001-2,000 MT	Above 2,000 MT
# of seed companies	7	11	10	6	10

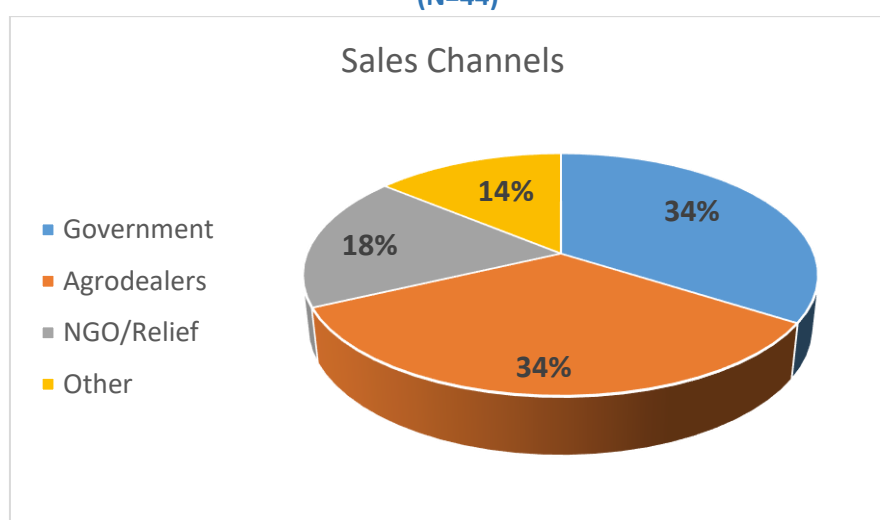
Table 3: Size of company by average annual sales and home country (N=44)

	Below 200 MT	201-500 MT	501-1,000 MT	1,001-2,000 MT	above 2,000 MT	Total
Burkina Faso		1	1		1	3
Ethiopia		2	1	1	1	5
Ghana	2	1	2	1		6
Kenya			2		1	3
Malawi	2	1		1		4
Mali		2		1		3
Mozambique		1	1			2
Nigeria		1	1		3	5
Rwanda	2					2
South Sudan	1	1				2
Tanzania		1	1			2

	Below 200 MT	201-500 MT	501-1,000 MT	1,001-2,000 MT	above 2,000 MT	Total
Uganda			1		4	5
Zambia				2		2
TOTAL	7	11	10	6	10	44

Sales Channels

Figure 2: Seed company percentage of sales through various sales channels (N=44)



II. Variety Turnover

Table 4: Number of new varieties seed companies started selling in the last 2 years (N=43) and 5 years (N=44)

	Average # of new varieties
Last 2 years	1.93
Last 5 years	4.205

Table 5: Percentage of sales from varieties that have been released for less than 8 years (N=44)

	Below 5%	5-15%	16-25%	26-40%	41-60%	61-80%	80% +
# of companies	1	1	1	2	9	6	24

III. Retail Distribution

Figure 3: Sufficiency of retail distribution to meet seed company's needs (N=45)

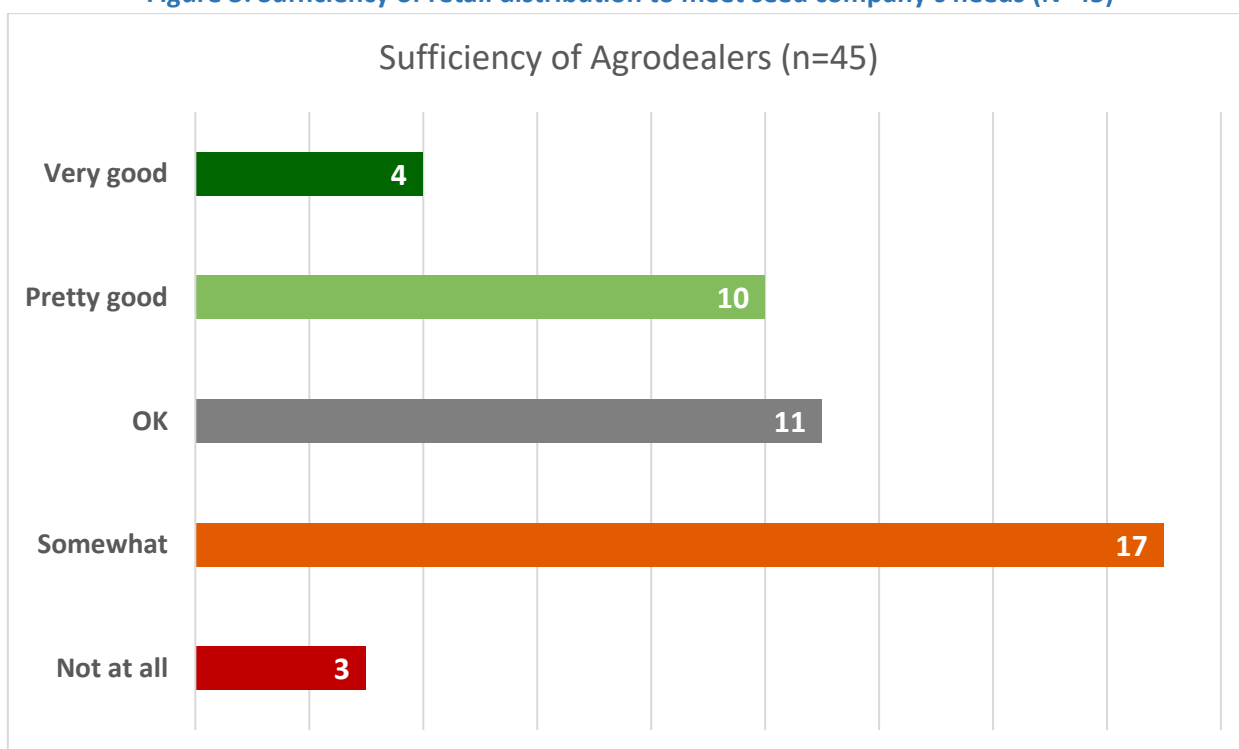
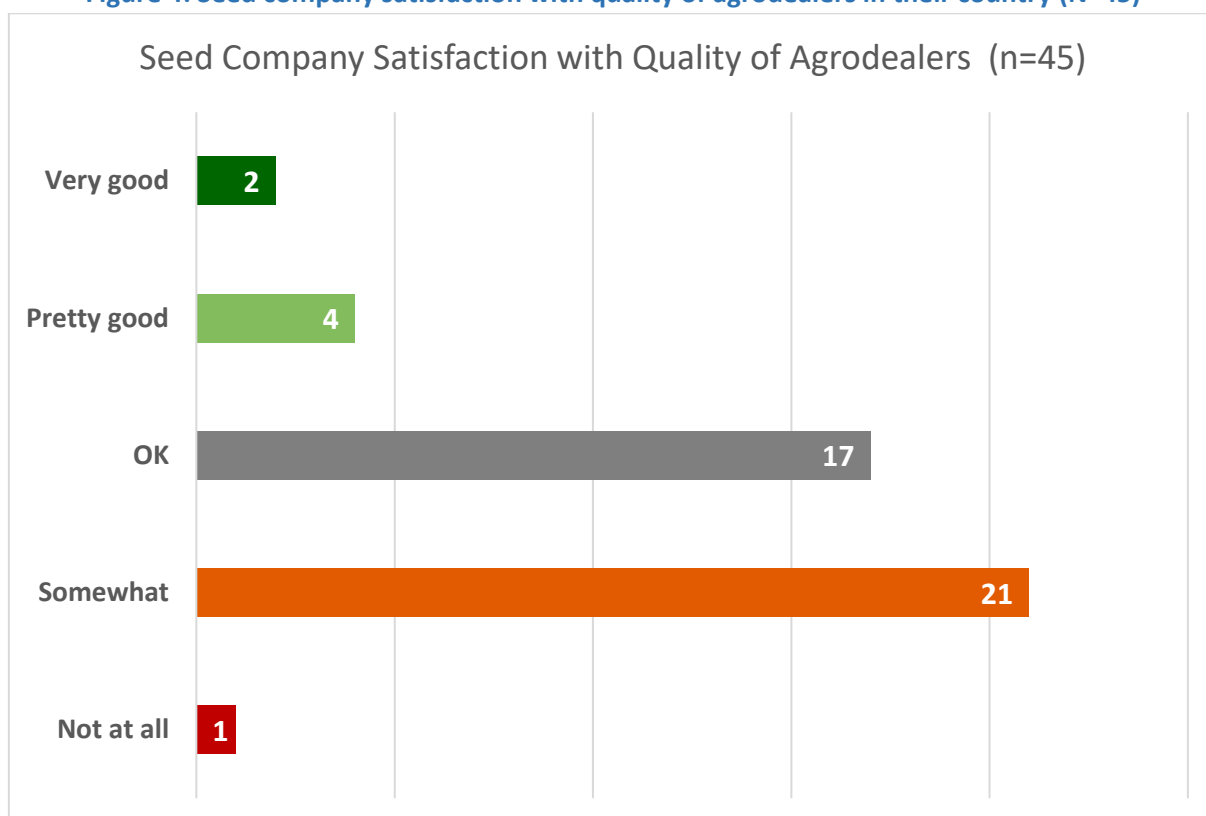


Figure 4: Seed company satisfaction with quality of agrodealers in their country (N=45)



Seed companies' top ideas for addressing agrodealer challenges in their countries

1. Agrodealer training (Seed handling, seed quality, storage and technical backstopping)
2. Agrodealer financing
3. Agrodealer credit system
4. Distributing subsidies through agrodealers
5. Training on fake seed identification
6. Training on point of sale and other IT systems
7. Demo plot establishment in each village
8. Improved storage facilities

IV. Early Generation Seed

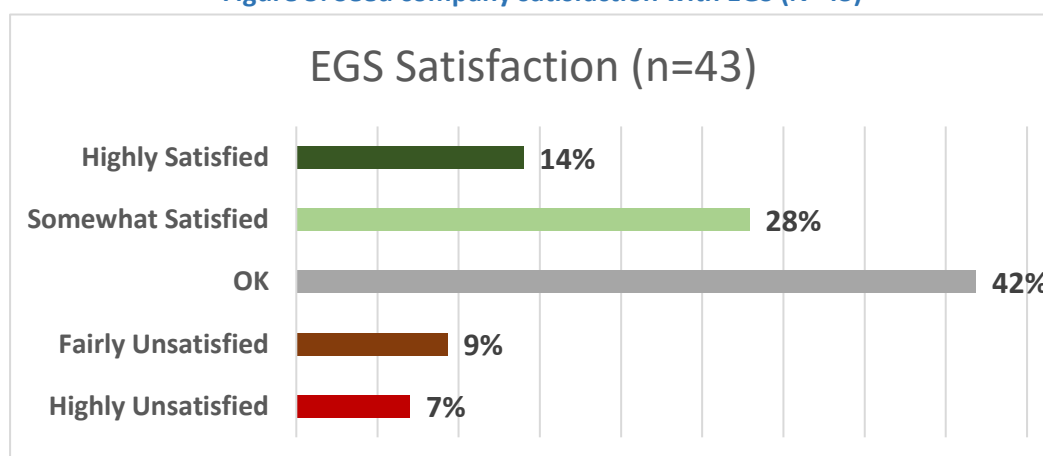
Table 6: Seed company source of EGS (simple average of seed companies' replies) (N=36)

Own production	Govt Research Programs	Another seed company	CG center	Other (Specify)	TOTAL
45%	32%	14%	10%	<1%	100%

Table 7: Seed company source of EGS (weighted by size bracket of seed company) (N=36)

Own production	Govt Research Programs	Another seed company	CG center	Other (Specify)	TOTAL
48%	27%	9%	16%	1%	100%

Figure 5: Seed company satisfaction with EGS (N=43)



Seed companies' specific challenges with EGS (21)

1. Low quality of EGS
2. Late delivery of EGS
3. Lack of infrastructure to produce EGS
4. Lack of enough breeder seed
5. Lack of access to parental lines

V. Business Environment

Figure 6: Seed company attitude about sustainability of their business (N=46)



Agri Experience is deeply grateful to all of the seed companies who shared their experience, information, and perspective, and to AGRA for the opportunity to conduct this important survey.

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Dear Seed Company Leader,

This is a short survey that we will use to inform government and donor work on seed sector development in sub-Saharan Africa.

Please answer the questions below very accurately. If you prefer to keep your company and name anonymous, you can choose to do so. All responses will be kept strictly confidential.

Your home country	
Other countries where you sell seed	

Your current business

1. For which crops do you sell seed? *(Do not include vegetable/horticulture crops for this and all other questions)*

2. What is your average annual sales tonnage? (Select one box)

Select one box	< 200 mt	201-500 mt	501-1,000 mt	1,001-2,000 mt	>2,000 mt

3. What percentage of your annual sales is in the following categories (Please ensure percentages add to 100%)

	% of total sales (mt)
% of sales (mt) sold to government or other public institutions	
% of sales (mt) sold through agrodealer or other retail channels	
% of sales (mt) sold to NGOs and relief agencies	
% of sales (mt) sold to others (please specify)	
	100%

4. How many new varieties have you started selling in the last 5 years? _____

5. How many of these varieties have you introduced in just the last 2 years? _____

6. What percentage of your sales do you estimate comes from varieties that have been released in your country for less than 8 years? (Select one box)

Select one box	< 5%	5-15%	16-25%	26-40%	41-60%	61-80%	>80%

7. What percentage of your annual sales do you estimate is exported, either by you directly or by the group you sell it to (e.g. exported as relief seed)? _____

8. How do you feel about the financial sustainability of your business, on a scale of 1 (low) to 5(high)?

Select one box below.

1. Highly unstable	2. Moderately unstable	3. Just OK	4. Somewhat stable	5. Highly stable

PLEASE TURN OVER

Your business development needs

9. For each of the categories below, what are your most important needs in order to **make your business more efficient?** Please rank each area as **High, Medium or Low** in importance to you, and **specify your needs.**

Training for operational staff (please specify the training needed):
Training for outgrowers (please specify the training needed):
Training for company management (please specify the training needed):
Computer, digital, and information tools (please specify the types of tools needed):
Other efficiency needs (please specify):

10. How sufficient are the number (quantity) of agrodealers (retail distribution network) in your country to meet your needs, on a scale of 1 (low) to 5 (high)? **Select one box below.**

1. Not at all	2.Somewhat	3. OK	4. Pretty good	5. Very good

11. How satisfied are you with the quality of agrodealers distributing your seed? **Select one box below.**

1. Not at all	2.Somewhat	3. OK	4. Pretty good	5. Very good

12. What are your top ideas for addressing any agrodealer challenges (both quantity and quality) in your country?

13. What percentage of your Early Generation Seed (EGS, or pre-basic, basic, etc.) comes from the following sources?

Own production	Govt research program	Another seed company	CG center	Other (Specify)	TOTAL
					100%

14. How satisfied are you with your EGS, on a scale of 1 (low) to 5 (high)? **Select one box below.**

1.Highly unsatisfied	2.Fairly unsatisfied	3. OK	4. Somewhat satisfied	5. Highly satisfied

15. What are your top EGS challenges related to quality, quantity, or timing of delivery? _____

THANK YOU SO MUCH FOR SHAIING YOUR KNOWLEDGE AND IDEAS

Company name (optional)	
Your name (optional)	