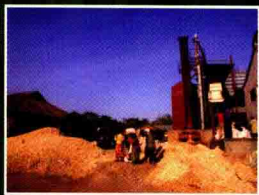




AFRICAN SEED ENTERPRISES

Sowing the Seeds of Food Security

Edited by **Paul Van Mele, Jeffery W. Bentley and Robert G. Guéi**



AfricaRice



African Seed Enterprises

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Paul Van Mele

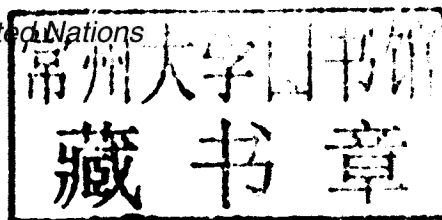
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African Seed Enterprises

Sowing the Seeds of Food Security

8

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Foreword

The world is currently struggling to harness its resources to meet the growing challenges of food production in the face of population growth, climate change and increased prices of energy and other production factors. The second World Seed Conference (Rome, 8–9 September 2009) revealed that the global seed market has grown rapidly in recent years and is currently around US\$37 billion. However, developing countries are yet to be part of the major seed trade. The conference therefore called for urgent government measures to increase public and private investments in the seed sector for agriculture to meet the challenge of food security.

It is gratifying to note that, in all African countries, some arrangements exist to provide seeds for farmers, attesting to the recognition by African governments that this input is critical for food security. However, in spite of good intentions, seed programmes often do not or no longer meet the needs of farmers. In southern and eastern Africa, private sector participation is more advanced, resulting in relatively better developed seed industries, even if only for a few selected and commercially attractive crops. In the rest of Africa, the rapid pace of seed sector development in the past seems not to have resulted in sustainable programmes, as most of it is concentrated on state farms, parastatals and other publicly funded and operated seed activities across the board. Economically they were not sustainable as public budgets dwindled and donor support waned.

The recent trend is for the public sector to disengage from seed production, although responsibility for early generation seed production continues to be entrusted to some public funded agencies.

As the public sector withdraws, the degree of abandonment of seeds of crops (self- and cross-pollinated) important to food security but of little interest to multinational companies becomes even more pronounced and that of vegetatively propagated crops such as cassava, plantains and yams even direr. Indeed, this is the present situation in most countries where seed development is following modern trends. Clearly some imaginative ways have to be found to enable a sustainable seed production and distribution effort to take off for food security crops in Africa.

As an initial step, FAO and AfricaRice joined efforts to document, throughout Africa, success stories of small and medium-sized seed enterprises dealing with non-hybrid food crops and identify the factors behind their success.

The case studies from nine African countries presented in this book provide an overview of the current status of the African seed sector, and associated challenges and opportunities. They form a solid basis for a broad-based discussion on how to strengthen the sector to the benefit of food security across the continent.

The studies showed that the challenges facing the seed sector in Africa are many and varied including at institutional and infrastructure levels. However, many African

seed enterprises are able to bring together the formal and informal seed sectors in rather innovative ways, thereby assuring a flow of improved seeds to small farmers. The sustainable development of these enterprises is challenging in most countries due to the absence of an enabling environment. Entrepreneurs face non-adapted legislation, poor infrastructure, lack of appropriate financial products and business support services and lack of training. The extent to which each country is able to address these challenges and empower all the major actors will undoubtedly positively impact the growth of the seed sector.

The lessons learnt from these studies should help support the rapid development of the African seed sector and increase the steady supply of quality seed of food security crops to millions of African smallholder farmers.

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Introduction to this Book

The subject of seed provision commands an exceptional amount of attention in most discussions of agricultural development. The reasons are not difficult to understand, as the security and quality of seed supply are among the principal determinants of any farmer's success. But, despite this unanimity of interest, there is relatively little agreement on what needs to be done to support the growth of effective and equitable seed provision in developing countries.

Part of the controversy over seed provision is the product of legitimate concerns about the nature and impact of the commercial seed sector. There is, for instance, the danger that an overemphasis on commercial seed supply will disregard the role that farmers continue to play in the identification and preservation of productive germ-plasm, the maintenance of local systems of seed sale and exchange, and innovations in crop management. In addition, there are understandable worries about the growing reach of the multinational 'life sciences' industry, its increasing control of the seed sector and the concentration of access to technology in too few hands.

But commercial seed supply can take many different forms, and it is a larger part of many 'traditional' farming systems than people may realize. It is difficult to imagine a productive agricultural system in the 21st century without access to some type of formal seed provision through various types of seed enterprise. As agricultural economies develop there is a natural shift towards specialization in the supply of products and services that were previously part of self-sufficient farms or communities. The access to commercial seed supply offers wider access to the products of modern plant breeding and helps ensure that a farmer's seed supply is not completely dependent on the vagaries of local climate or other uncertainties in local production systems. In addition, the expansion of agricultural markets often provides farmers with an opportunity to earn a premium for the specific qualities of their produce, which may require more attention to high quality and uniform seed than can be provided on-farm. The availability of commercial seed also allows the farmer to invest time in other activities, on- or off-farm, without having to worry about next year's seed supply.

Seed is a special product, embodying specific genetic information as well as important physical qualities, and as such its commerce offers particular challenges and opportunities. Some of the challenges are related to the fact that many of the seed's qualities are not immediately obvious to the buyer and hence some type of regulatory system may be required. But, even where seed regulatory regimes are in place, they are rarely successful unless there is a concomitant exercise of farmers' own capacities to understand input markets and to learn about the products on offer, and the investment of seed suppliers in establishing and promoting their reputations in the farming community. Formal seed provision thus offers a stimulus to the expansion of robust agricultural markets by developing the trust and knowledge that allows participants to make productive exchanges.

The expansion of formal seed provision also offers other contributions to the development of the agricultural economy. The inability of public plant breeding programmes to deliver many of their varieties to farmers has been a chronic problem. The emergence of local seed enterprises (many of which will depend, at least initially, on public varieties) offers a solution to this dilemma, places increased pressure on public research to deliver products that farmers can use and offers opportunities for productive public-private interactions that are crucial to agricultural development. Although there are some economies of scale in seed production, experience has shown that relatively small seed companies can be viable, thus offering the opportunity to contribute to the development of small and medium-size businesses supporting local agriculture. In addition, the fact that most commercial seed production is done through contracted seed growers offers an opportunity for some farmers to increase their earnings through specialized production.

There has been much investment by donors and national governments over the past several decades in support of the formal seed sector in developing countries. Some of those investments are beginning to pay off, but there is much that remains to be done. This is particularly true in sub-Saharan Africa, where there are many challenges to establishing viable businesses. Although the literature on seed systems includes various attempts to describe patterns of seed enterprise growth and to delineate distinct stages in seed industry development, these tend to be oversimplified approximations. The reality is much more complex and idiosyncratic. The performance and prospects of seed enterprises depend on a wide range of factors, including the specific crops, the characteristics of national agricultural economies and the adequacy of local institutions.

There is thus much to be learned about what is needed to ensure seed enterprise development. That is why *African Seed Enterprises* is important, because this book describes an exceptionally wide range of experiences in sub-Saharan African countries. Each of the cases is substantially unique and presents a particular history and set of lessons. The descriptions are accompanied by country profiles that allow the reader to appreciate the agricultural and policy environment that determines the trajectory of these enterprises. Not all of the enterprises described in this book are likely to survive, and some are still perilously small operations or highly dependent on external support. But their experience to date offers an exceptionally rich source of data and ideas for understanding seed systems and appreciating the diversity of strategies and resources that have been used to create new seed enterprises. These are the varied and often imperfectly formed building blocks from which viable commercial seed systems are being constructed. The experiences should be of great use to governments and donors when they consider how to provide more adequate support to seed enterprise development.

Robert Tripp

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