



Access to Seeds
Index

Enhancing Seed Trade Lessons from the Access to Seeds Index 2019

Bangalore, 19 October 2019

BILL & MELINDA
GATES *foundation*

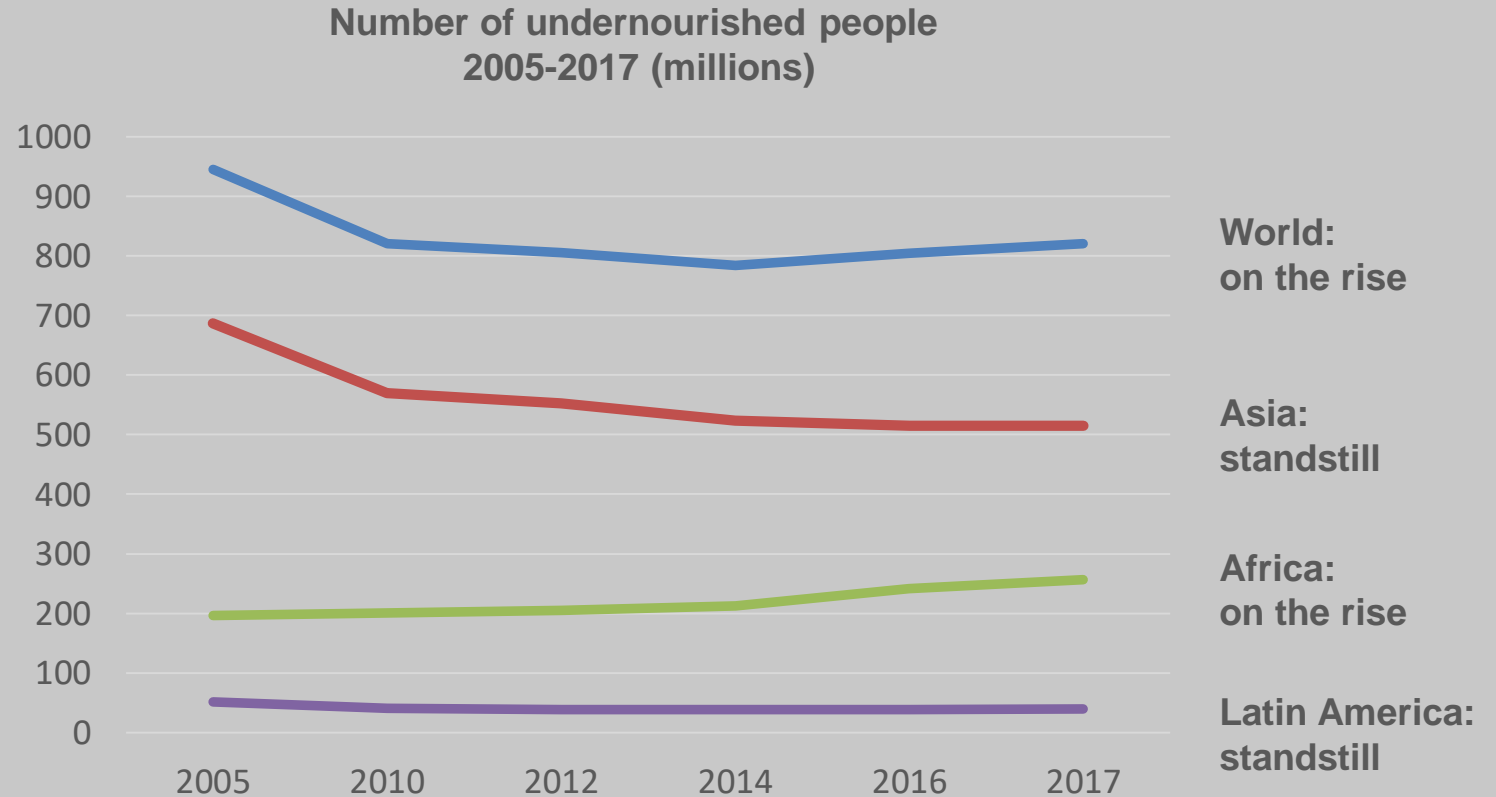
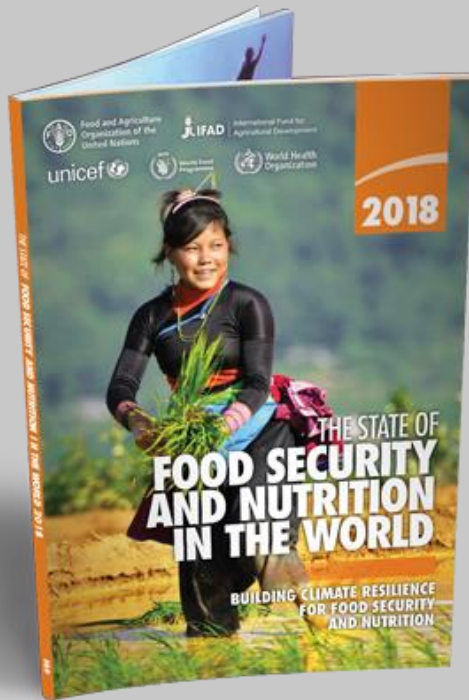


Kingdom of the Netherlands



World
Benchmarking
Alliance

UN Agencies (2018): We are losing the fight against hunger and malnutrition, because of climate change



UN agencies

- Help farmers to adapt to climate change
- Improve access to new crop varieties



The Sustainable Development Goals cannot be achieved without changing the food system



Scientific reports (2019):

“Without change, the global food system will destabilize the planet”



Food system transformation

Remain food production within planetary boundaries

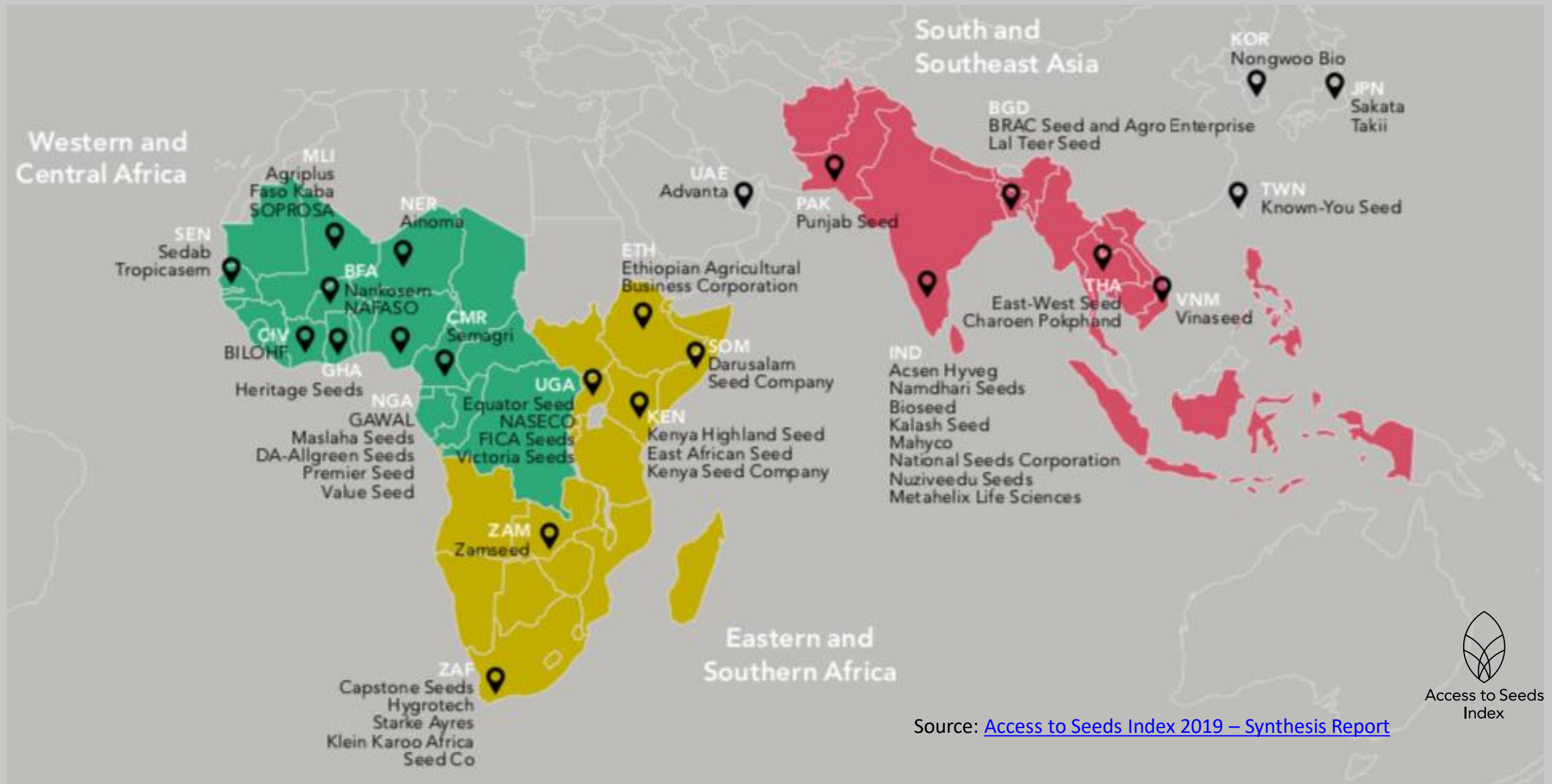
- Climate
- Land
- Water
- Nutrients
- Biodiversity

Shift to healthier and sustainable diets

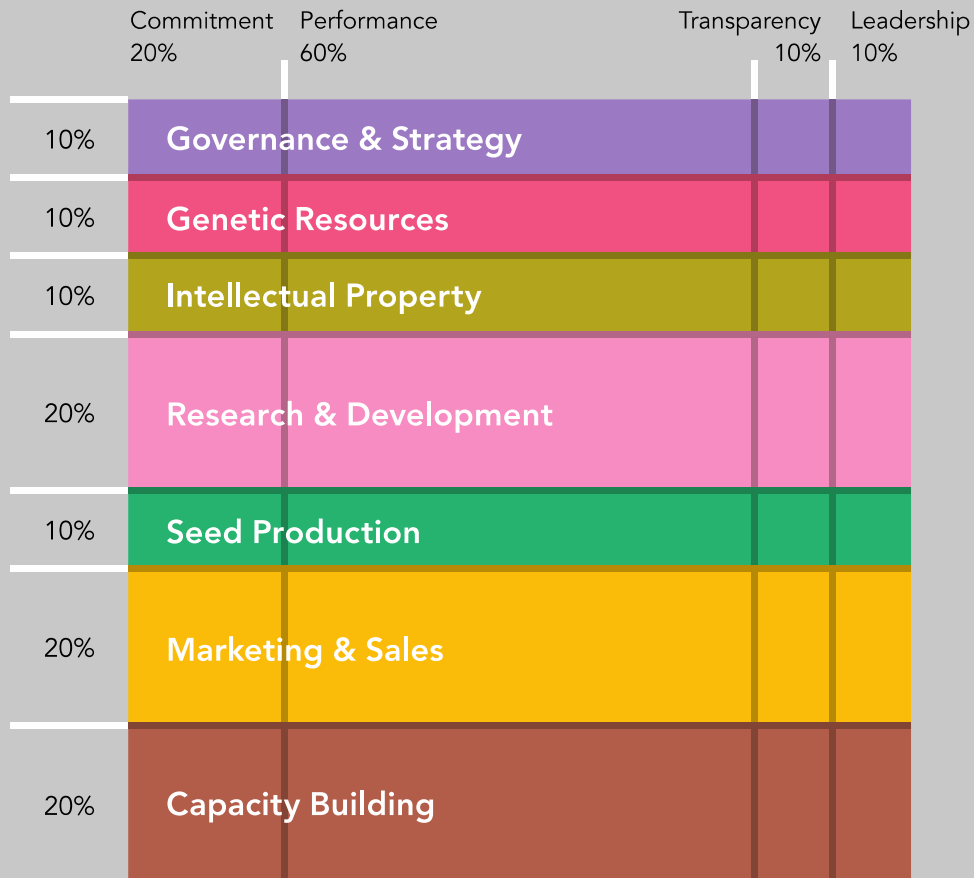
- Accessibility
- Agrobiodiversity
- Nutritional value
- Plant-based proteins
- Better shelf life



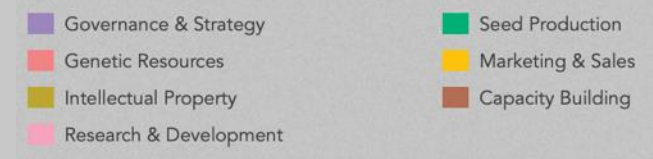
Access to Seeds Index 2019: evaluated performance of 62 seed companies, including 45 companies from regions themselves



The Index assesses company activities in seven areas, developed with 25 experts from all regions

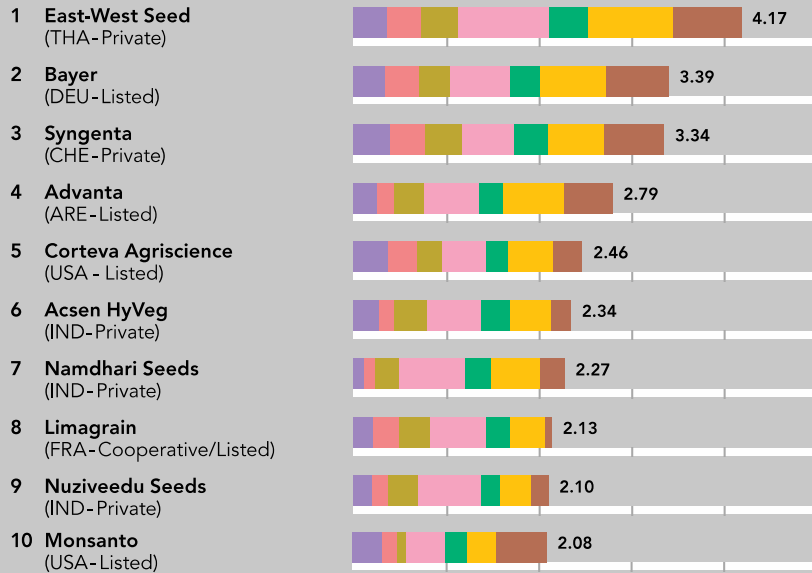


Rankings demonstrate the key role of regional companies for improving access to seeds



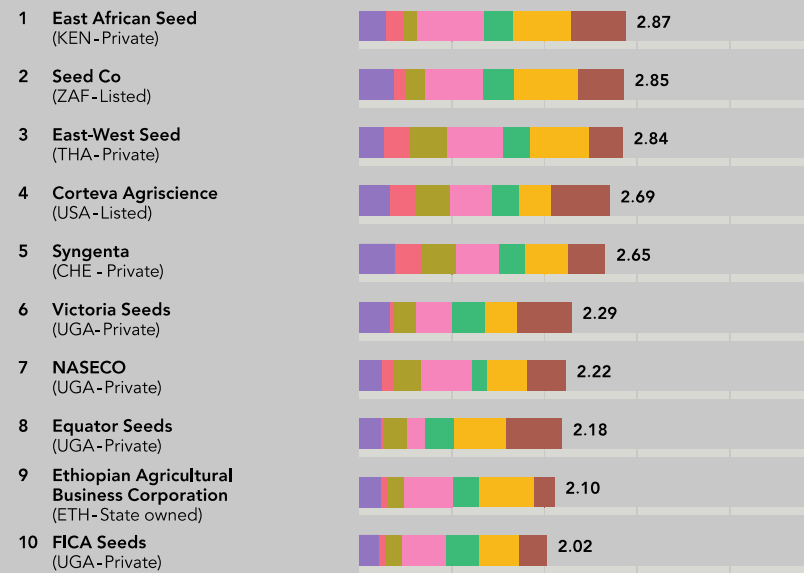
South and Southeast Asia:

- 5 Global companies in top 10;
- 5 from region (three from India)



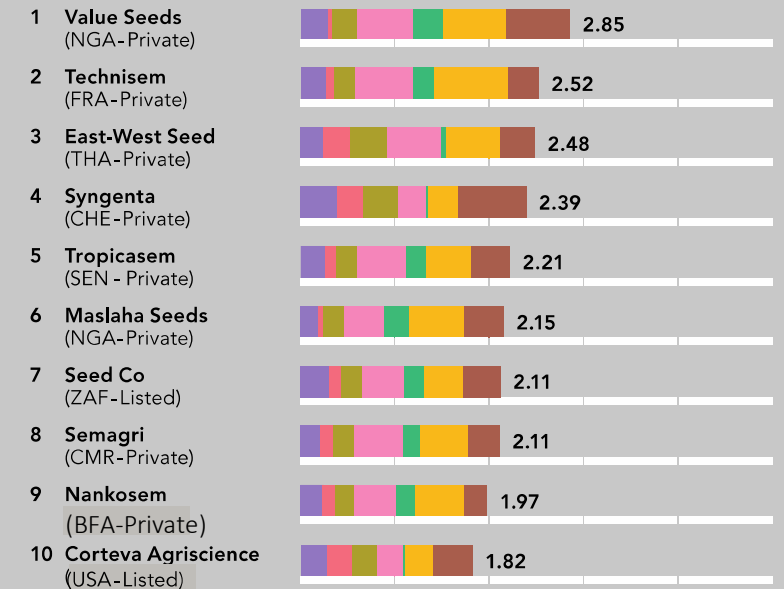
Eastern & Southern Africa:

- 2 regional companies lead,
- 7 from region in top 10

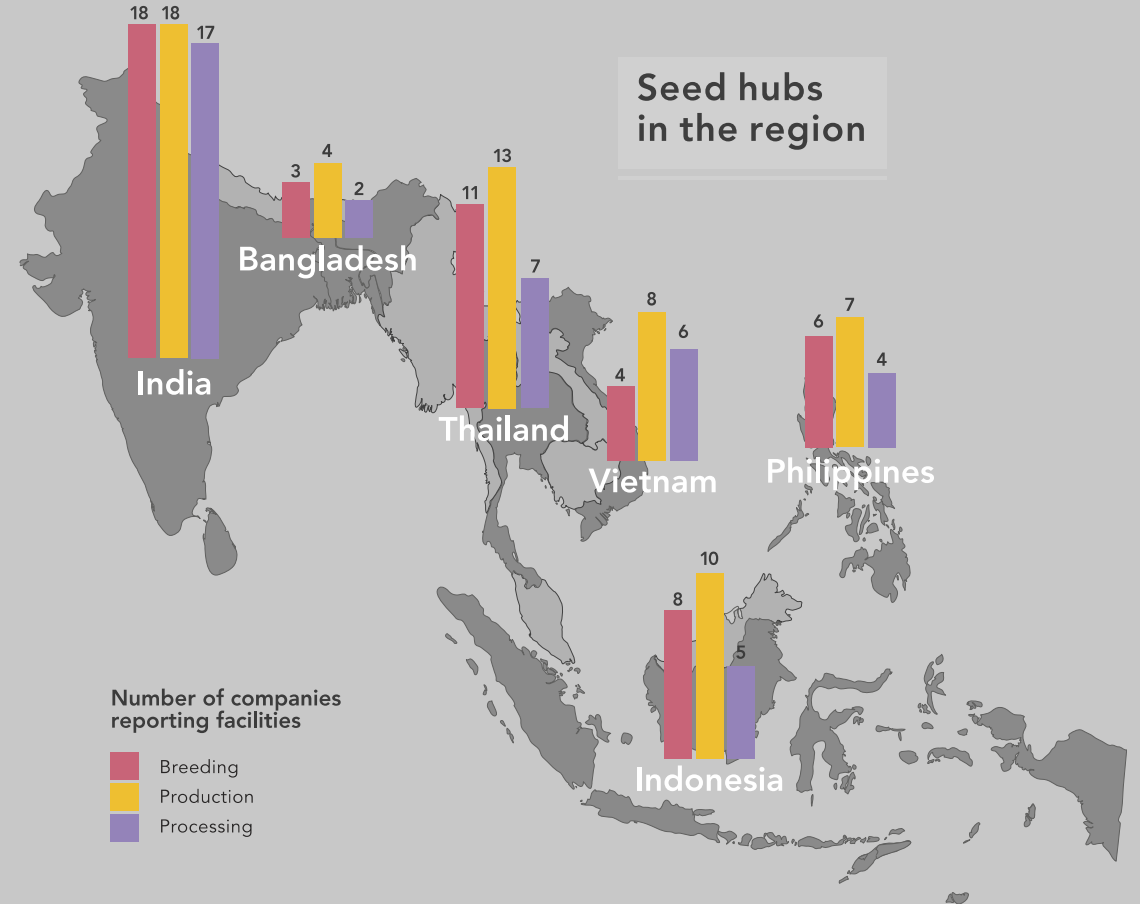
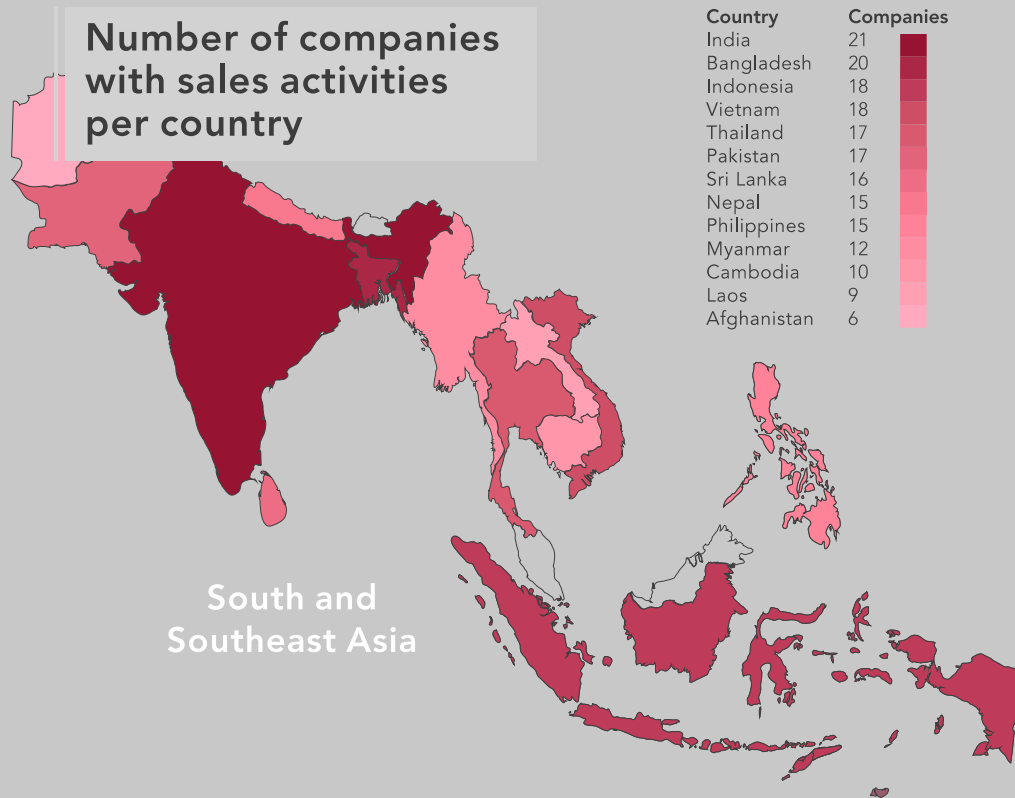


Western & Central Africa:

- Nigerian comp. leads ranking;
- 5 from the region in top 10

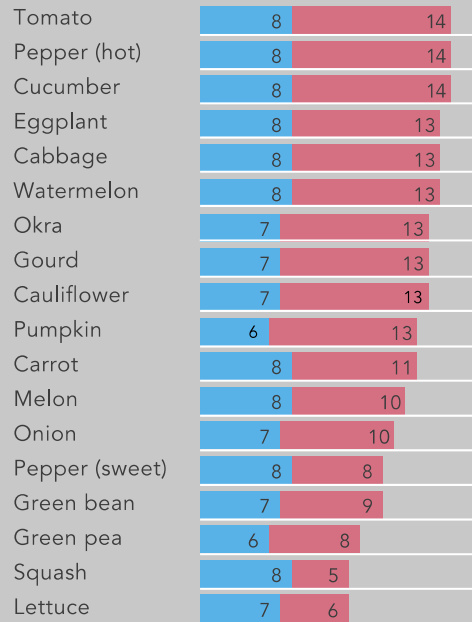


South and Southeast Asia: Highly competitive, research-driven and regionally active



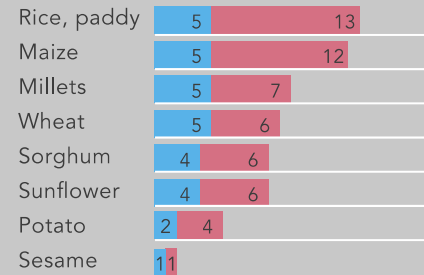
South and Southeast Asia: Companies work on a broad portfolio. Legumes are largely overlooked. Hybrids are dominant

Vegetables

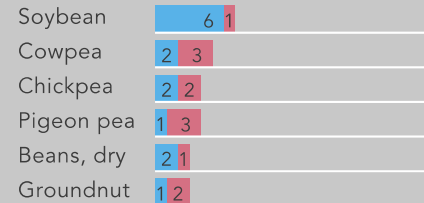


Global companies
Regional companies

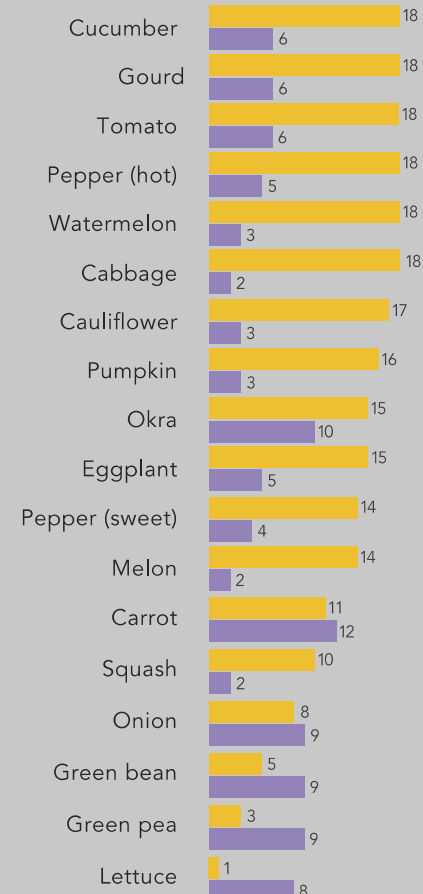
Field crops



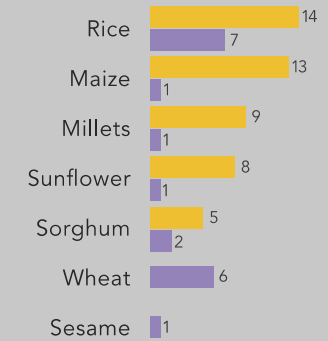
Legumes



Vegetables



Field crops

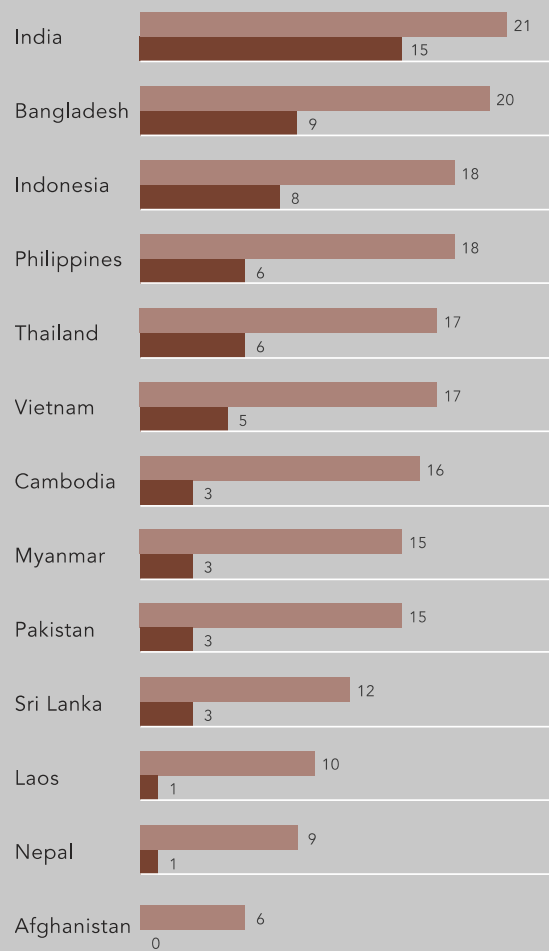


Hybrid
OPV



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Index

South and Southeast Asia: Companies reach only 20% of smallholders; most companies focus adoption strategies on just a few countries



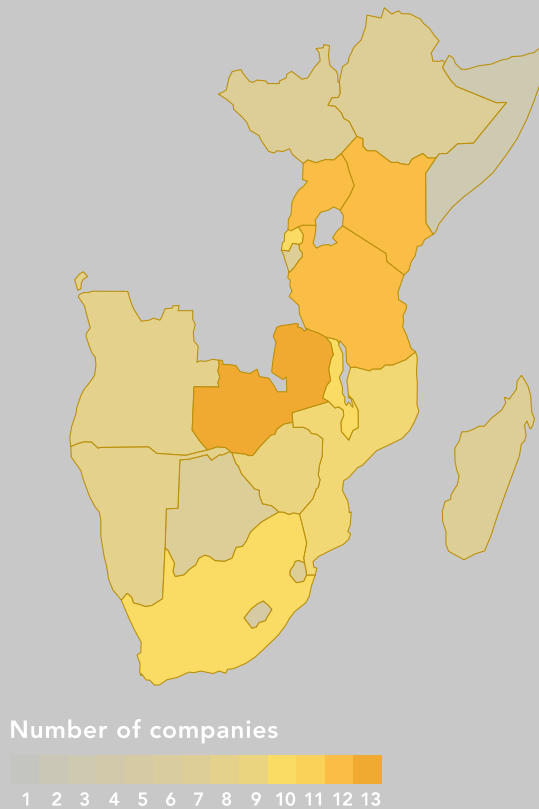
Sales is often not accompanied by capacity building

■ Number of companies with capacity building programs
■ Number of companies present

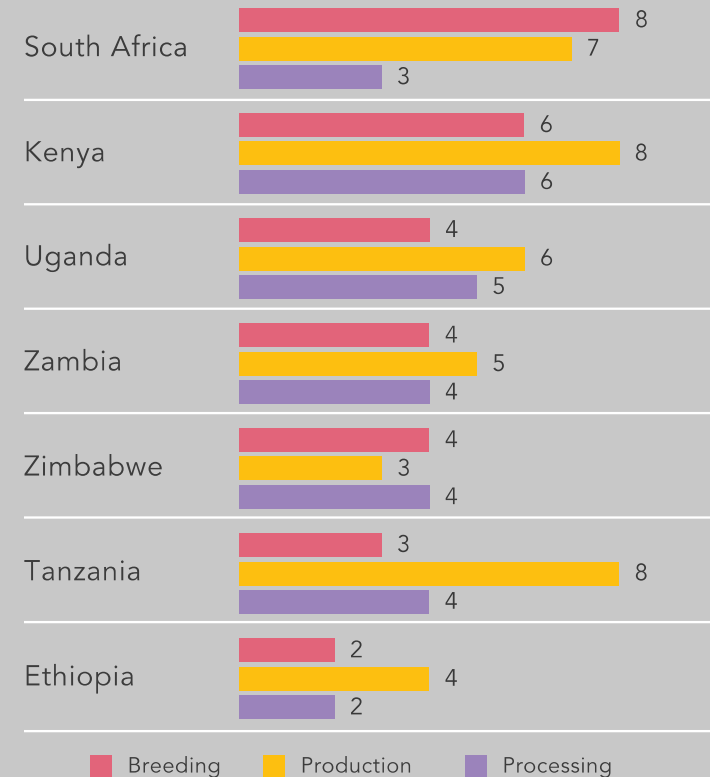
Source: Key findings, [Access to Seeds Index for South and Southeast Asia 2019](#)

Eastern and Southern Africa: Leading seed companies are present throughout the region, South Africa and Kenya emerge as seed hubs

Seed company presence



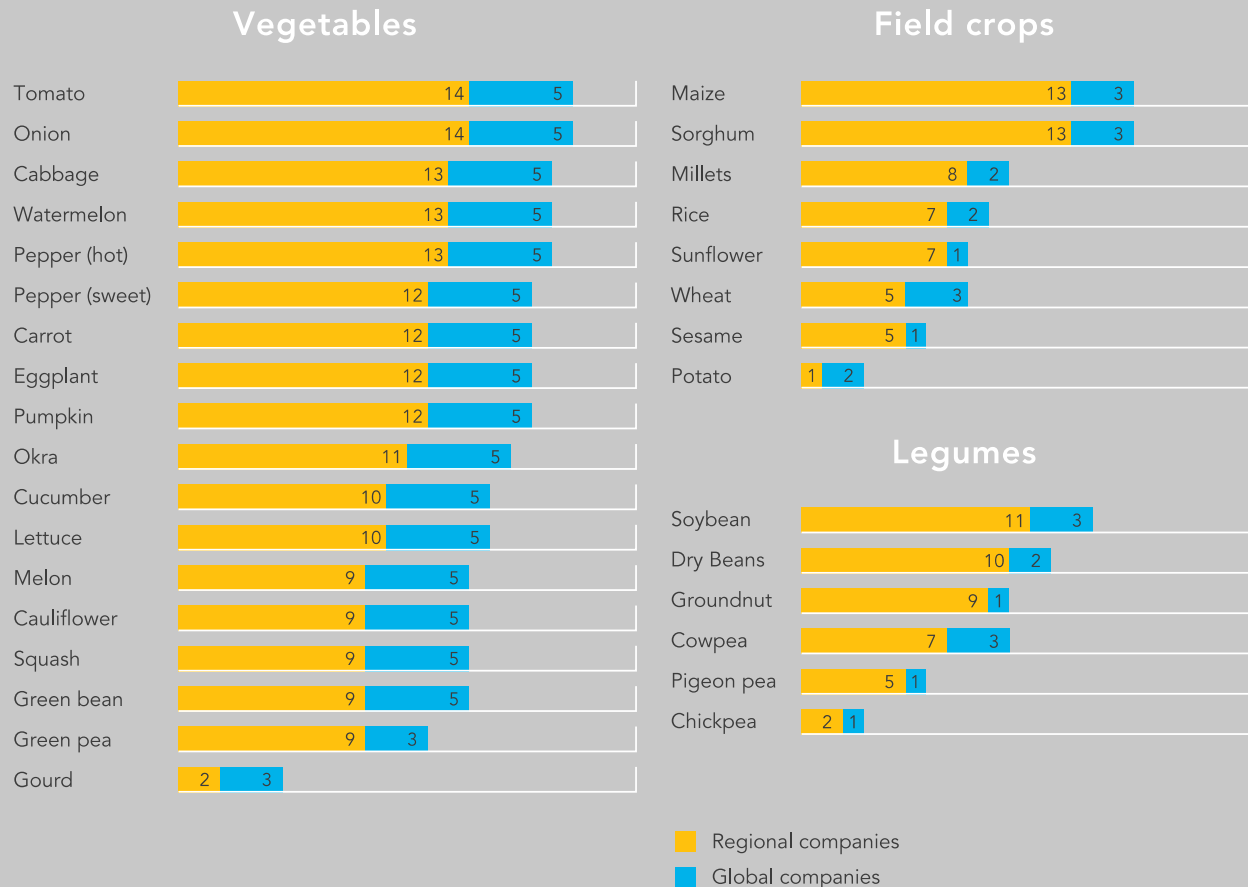
Main seed hubs



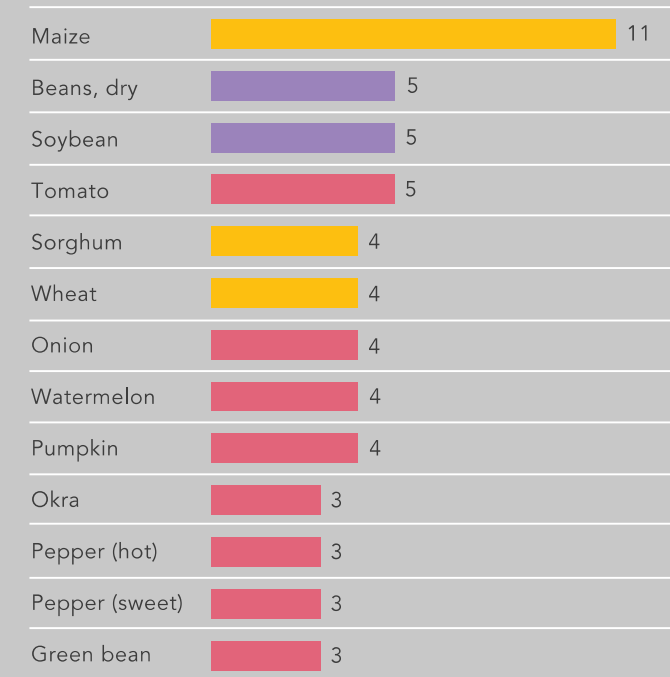
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Index

Eastern and Southern Africa: Companies have a broad sales portfolio but focus breeding primarily on maize

Crops found in company portfolios

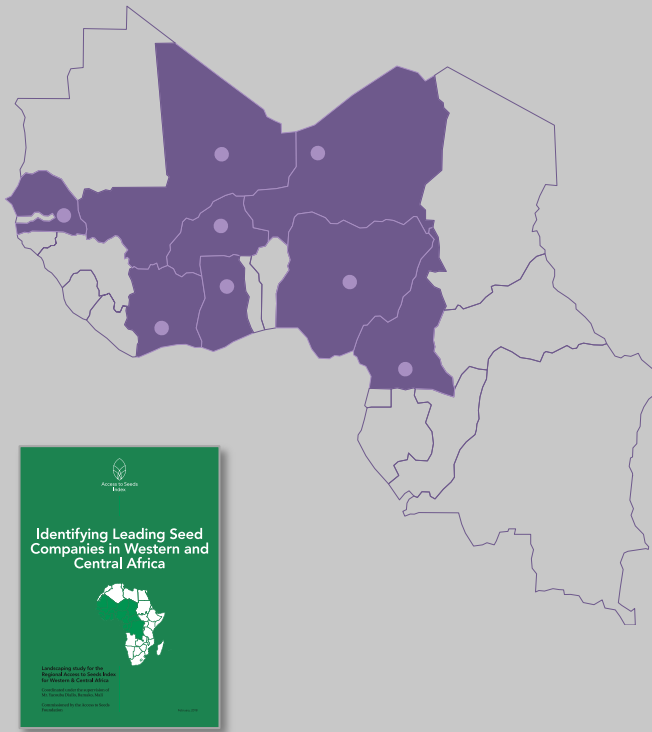


Number of companies with breeding programs for crops

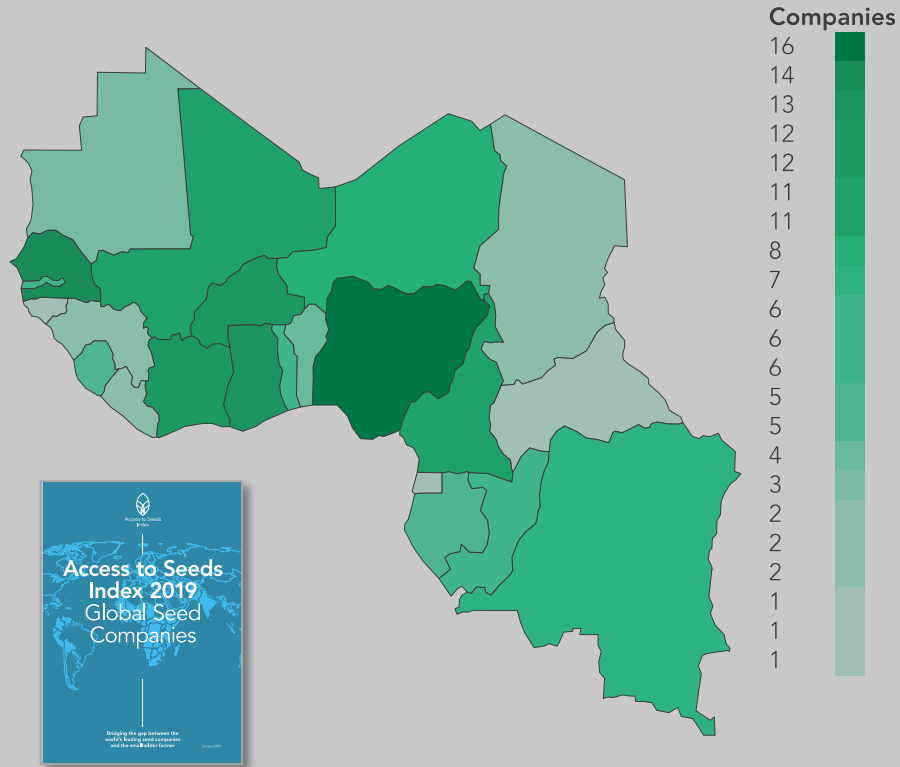


Western and Central Africa: Diversity of seed industry players has potential to release new varieties across all countries...

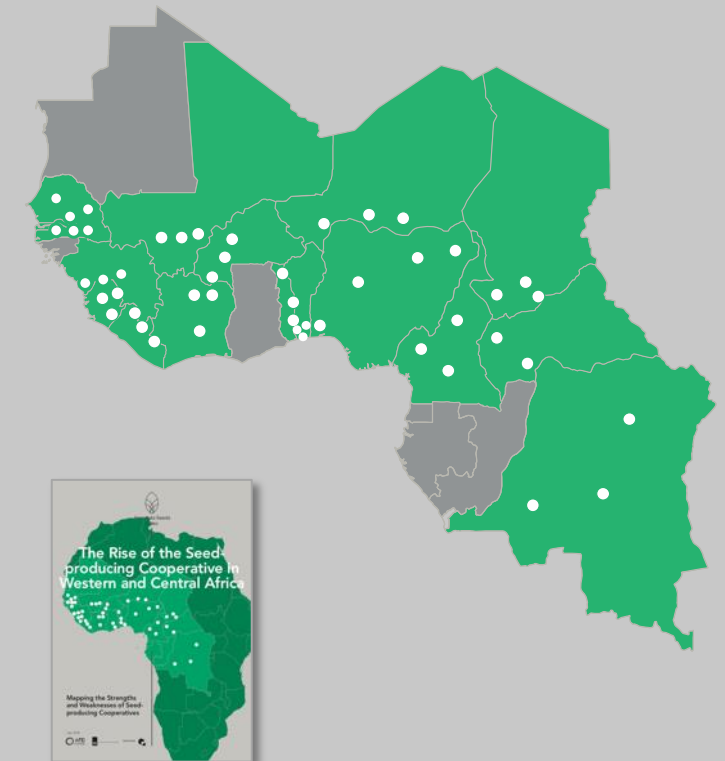
Origin of homegrown seed companies



Presence global seed companies

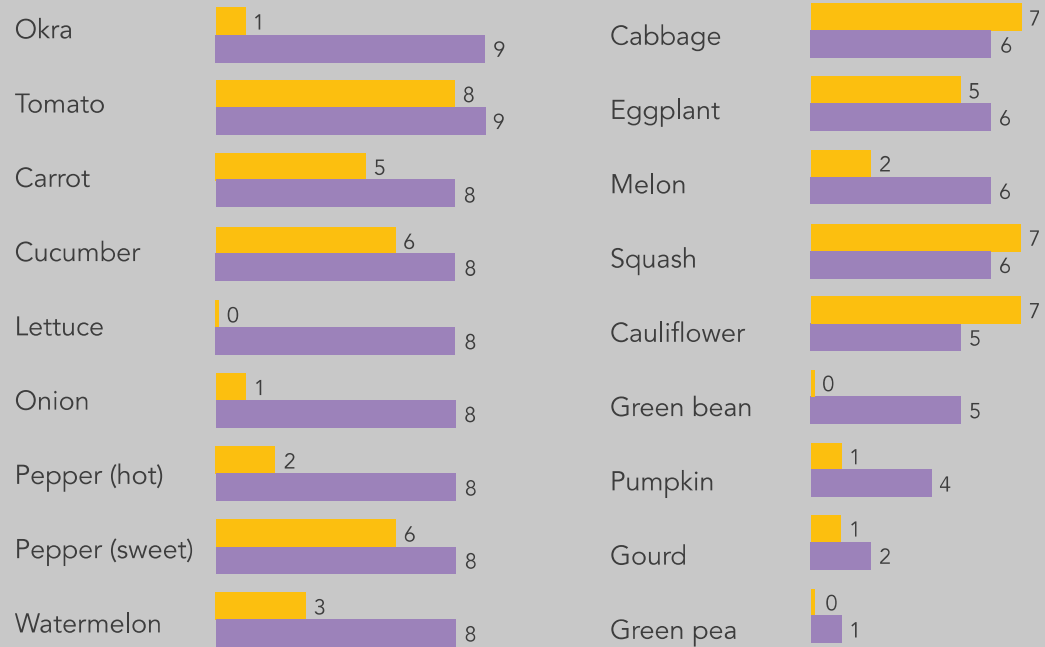


Presence seed-producing cooperatives



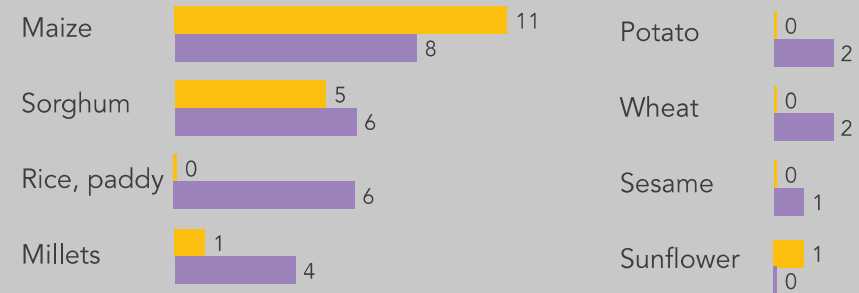
Western and Central Africa: Companies work on a broad portfolio; OPVs are dominant, hybridization coming up

Vegetables



Hybrid OPV

Field crops

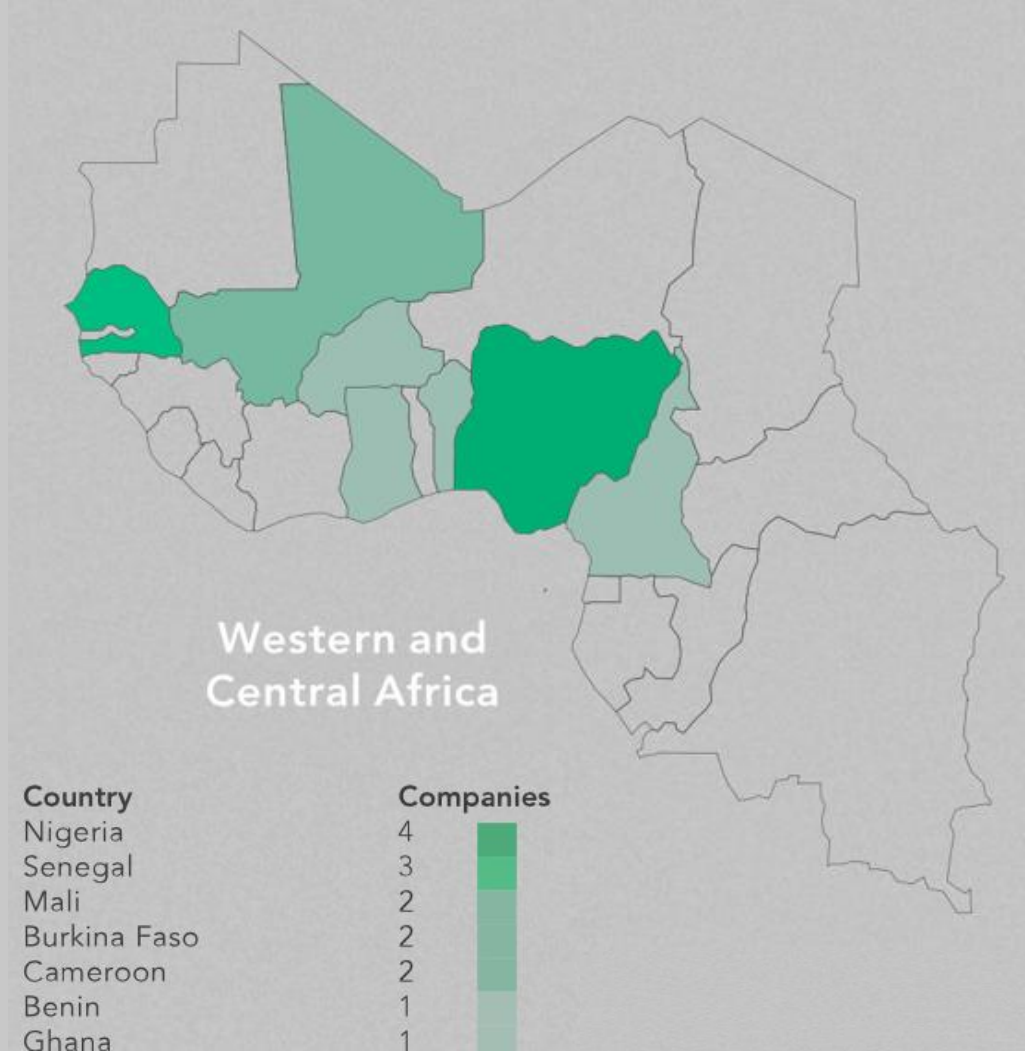


Legumes



Access to Seeds
Index

Only eight African companies and three global companies are involved in breeding, resulting in outdated portfolio



Companies breeding in Western and Central Africa

From African continent

SOPROSA
Mali

Tropicasem
Senegal

NANKOSEM
Burkina Faso

Value Seeds
Nigeria

Premier Seed
Nigeria

Maslaha Seeds
Nigeria

Semagri
Cameroon

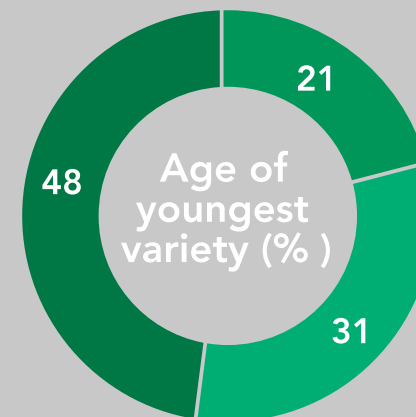
Seed Co
Ghana

From outside the continent

Syngenta
Mali, Nigeria, Senegal

Technisem
Senegal, Cameroon, Burkina Faso

East-West Seed
Benin



Almost 50% of portfolio of regional companies older than 5 years

- Less than three years
- Between three and five years
- More than five years

Scaling up innovation, speeding up regulation



Access to Seeds
Index

www.accesstoseeds.org

- Getting good seed in the hands of farmers is a global priority for climate action SDGs, and food system transformation
- Asian seed industry has regional challenges, and a lot of potential for the African continent
- Network of professional seed partners is available to reach African farmers across all sub-Saharan countries



Access to Seeds
Index

Access to Seeds Index: unique resource in the public domain on seed industry performance in the global south

Rankings


In 2019 the Access to Seeds Index published multiple indexes that evaluate the performance of the seed industry at the regional level in South and Southeast Asia and sub-Saharan Africa as well as the global seed industry as a whole.



Global Seed Companies	South and Southeast Asia	Eastern and Southern Africa	Western and Central Africa
1 East-West Seed (THA - Private)	1 East-West Seed (THA - Private)	1 East-West Seed (THA - Private)	1 East-West Seed (THA - Private)
2 Syngenta (CHE - Private)	2 Syngenta (CHE - Private)	2 Syngenta (CHE - Private)	2 Syngenta (CHE - Private)
3 Bayer (DEU - Listed)	3 Bayer (DEU - Listed)	3 Bayer (DEU - Listed)	3 Bayer (DEU - Listed)
4 Corteva Agriscience (USA - Listed)	4 Corteva Agriscience (USA - Listed)	4 Corteva Agriscience (USA - Listed)	4 Corteva Agriscience (USA - Listed)
5 Advanta (ARE - Listed)	5 Advanta (ARE - Listed)	5 Advanta (ARE - Listed)	5 Advanta (ARE - Listed)
6 Limagrain (FRA - Listed)	6 Limagrain (FRA - Listed)	6 Limagrain (FRA - Listed)	6 Limagrain (FRA - Listed)

Companies

The index presents scorecards for each company, which can be accessed via the company list below. The scorecards highlight a company's presence and portfolio, leading practices and notable findings. They also present comparative strengths in relation to the other companies assessed.



A Acsen HyVeg
Advanta
Agriplus Mali
Ferme Semencière AINOMA

B Bayer
Bejo
BILOHF
Bioseed
BRAC Seed & Agro Enterprise

C Corteva Agriscience

Corteva Agriscience

Corteva Agriscience is the agriculture division of DowDuPont and will be spun off as a separate company in June 2019. In index regions, it primarily works through its Pioneer and Pannar brands. Maize, rice and millets are considered its main crops.

[See scorecard](#)

Countries

The country profiles provide an overview of the presence and activities of all 62 index companies in each of the 65 countries in scope of the Access to Seeds Index.



Eastern and Southern Africa

- Angola [Seed more](#)
- Botswana [Seed more](#)
- Kenya [Seed more](#)
- Lesotho [Seed more](#)
- Namibia [Seed more](#)
- Rwanda [Seed more](#)
- South Sudan [Seed more](#)
- Tanzania [Seed more](#)

Zambia

Twenty index companies are present in Zambia, including Zamseed, which is headquartered here. Seven companies produce seed although only two involve

Performance seed industry in **three key regions**

Individual scorecards of **62 companies**

Presence and portfolio of companies across **65 countries**