INTEGRATED SEED SYSTEMS + SEED MARKETS

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SCALING SEED SYSTEMS project

0 - Introduction
1 - Tools
2 - Scaling Demand
3 - Integrating Seed Systems
4 - Foundation Seed
5 - Access to Finance
6 - Enabling Environment
7 - Conclusions

http://www.apxc.org/#!scaling-seed-briefs/c85p
Channels through which Farmers Source Seed Seed

- Genebanks
- Cultivation
- Harvesting
- Storage
- Consumption
- Genebanks
- Breeders
- Seed production

- Planting
- Cultivation
- Harvesting

- SEED
- Govt
- Comm
- Relief
- Own
- Exch
- Markets

Other local Markets
Seed markets

Informal seed markets

Many crops: cereals, legumes

Agro-dealers/seed companies

Maize, vegetable seed
Seed markets: what is the extent of use?
## Seed System Security Assessments: 10,120 observations

<table>
<thead>
<tr>
<th>SSSA Country</th>
<th>Date</th>
<th>N</th>
</tr>
</thead>
<tbody>
<tr>
<td>Malawi (southern)</td>
<td>2011</td>
<td>682</td>
</tr>
<tr>
<td>Kenya (east +coast)</td>
<td>2011</td>
<td>745</td>
</tr>
<tr>
<td>DR Congo (Katanga)</td>
<td>2012</td>
<td>548</td>
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<tr>
<td>Haiti</td>
<td>2010</td>
<td>3564</td>
</tr>
<tr>
<td>S Sudan</td>
<td>2010</td>
<td>3986</td>
</tr>
<tr>
<td>Zimbabwe</td>
<td>2009</td>
<td>595</td>
</tr>
</tbody>
</table>
% of all seed supplied: (10,000 + obs)

- Local markets: 51%
- Own Stocks: 30%
- Agro-dealers: 9%
- Aid: 7%
- Others: 2%
Crops supplied by local markets— for seed

Maize
Bean
Groundnut
Sorghum
Pigeonpea
Cowpea
Sesame
Green Gram
Rice
Cassava
Irish Potato

Millet
Okra
Cabbage
Yams
Carrots
Tomato
Leeks
Onion
Lima Bean
Pepper
Mustard

Sweet Potato
Bambara Nut
Eggplant
Taro
Pumpkin
Chickpea
Spinach
Greens
Cotton
Pea
Seed Sources - legumes

n=3,324

- Local markets
- Own stocks
- Agro-dealers

%
Local Markets and Gender – maize

n=464

Local markets
Agro-dealers

Malawi
Kenya

%
Sources of new varieties (n=1, 683)

- **NGO/Gov't assistance**: 68%
- **Local markets**: 14%
- **Agro-dealers**: 7%
- **Others**: 11%

Includes:
- Social networks 7.5%
- Contract growers 0.2%
- Community seed groups 1.7%
- Other 1.7%
Informal Markets have clear functions

 ✓ Provide heart of seed supply-
   ✓ For the poor, in crisis-- **food security**

 ✓ Provide bulk of legume seed
   **nutrition**

 ✓ Allow a diverse response (wide range crops)
   **resilience/environment**

 ✓ Offer place for innovation (new varieties)
   **income**
Moving forward on scaling seed system-investments:

Focus: Moving New Varieties
Scaling goal #1: Increase proximity of outlets to get seed closer to farmers

How to do it

a. License ‘mom and pop stores’ (general goods) for seed sale

b. Expand current seed sale in supermarkets

c. Consign seed pack sale to large scale traders to move through informal channels

d. Map agro-dealer outlets related to target stress investments (e.g. drought tolerance): Expand in gap areas
Scaling goal #2: Reduce size of seed packs for purchase

How to do it:

a. Put packets of QDS seed also on offer to reduce cost + expand availability

b. Support research on pack size by crop and context (possibly adjust packing material
Scaling goal #3: improve marketing information about seed for farmers + traders

a. Catalyze SMS two-way information networks for farmers on location of seed suppliers

b. Spur cellphone feedback on variety performance and seed quality - farmers

c. Engage large traders on their marketing experience with select varieties
Three closing points:

- Don’t ignore the elephant in the room -- informal sector
  --consider integrated (formal-informal) seed system options

- Catalyze multiple leverage points which endure beyond projects-
  --‘system’ interventions

- Invest($$$) in the sustainable-- which can work at scale
  -- expand also existing structures