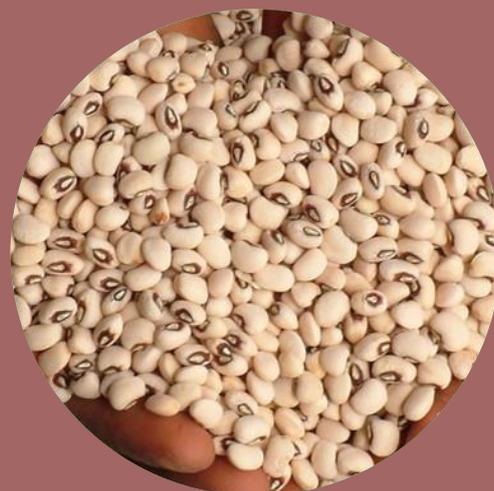


Nigeria Seed Sector Review

23 November 2019



Nigeria and the Netherlands have agreed to work together enhancing the performance of Nigeria's seed sector. This third brief informs stakeholders on the outcomes of the seed sector assessment, the multi-stakeholder workshop, and the meeting with development partners. It shares the final steps in elaborating the national seed road map.

Policy context

The Ministry for Agriculture and Rural Development of the Federal Government (FMARD) of Nigeria and the Embassy of the Kingdom of the Netherlands (EKN) in Abuja have agreed to collaborate in the development of Nigeria's seed sector. One of the steps to shape this collaboration is a seed sector review which aims to support the development of a multi-year seed sector development strategy or National Seed Road Map. A team of consultants is developing the document using a participatory and iterative process. The national seed road map provides options for enhancing the performance of the sector; it supports seed sector stakeholders and development partners in designing their future strategies and interventions. The Nigeria-Netherlands Seed Partnership will use the document as a basis to shape the collaboration in seed sector development.

Partners

Wageningen University & Research (WUR), Wageningen Centre for Development Innovation (WCIDI) has been selected as lead party to conduct the review. It collaborates with Sahel Consulting, Agriculture & Nutrition Ltd. and East-West Seeds and its Knowledge Transfer Foundation. Critical partners are the National Agricultural Seeds Council (NASC) and the Seed Entrepreneurs Association of Nigeria (SEEDAN) complemented with the EKN. The seed sector review is funded by the Netherlands Enterprise Agency (RVO).

Seed sector review: process

A desk study and a series of focus group discussions (FGDs) organized around four distinct crop groups

provided inputs to the [seed sector assessment](#). During the FGDs, resource persons and crop experts identified gaps in terms of seed supply meeting demand and associated challenges in the performance of the seed sector. In addition, they provided inputs for the development of strategies addressing those challenges. The consulting team has translated the challenges and strategies into ambitions and organized them within the framework for seed sector transformation.

Figure 1. Seed sector transformation framework – vision and functions



Seed sector transformation

Inspired by the approach of [integrated seed sector development \(ISSD\)](#), seed sector transformation moves away from linear thinking, i.e. realizing that seed systems for different crops face different challenges. It looks beyond individual crop value chains and applies "systems' thinking", i.e. a holistic approach with complementary strategies for the development of the seed sector as a whole. The framework uses the future vision as point of departure. Based on the seed sector challenges, ambitions

for transforming the sector are formulated. To perform well the sector needs a strong production base, i.e. it needs to perform well in relation to the functions of (i) service provision, (ii) seed production and (iii) market development. This production base needs to be complemented with strong governance, i.e. it needs to perform well in relation to the functions of (iv) revenue generation and re-investment, (v) coordination, and (vi) regulation and management. The six functions structure a future vision in which the seed sector becomes high-performing in ensuring availability of, access to and use of quality seed of all crops by farmers (see Figure 1).

Challenges

Based upon estimated seed gaps, the FGDs identified major challenges, which were further elaborated using key references (e.g. Enabling Business in Agriculture report for Nigeria ([EBA, 2017](#)), The African Seed Access Index ([TASAI, Nigeria report, 2019](#)) and Access to Seeds Index Western and Central Africa report ([AtSI, 2019](#))). The consulting team grouped and structured challenges according to the six functions for seed sector transformation. The team also indicated if challenges are important to all crops, or if they are crop or crop group specific. Challenges have been verified through a review by key partners of [the assessment report](#). More detailed insights on the challenges for crops and crop groups are available in [the crop brief report](#).

Ambitions

Based on the challenges and strategies, the consulting team elaborated ambitions. Ambitions are descriptions of a desired state or outcome of a transformation process. The consulting team grouped ambitions according to the six functions of sector transformation. The team marked ambitions as general, i.e. relevant to the entire seed sector and all crops, or as specific to certain crop groups (maize; roots, tubers and bananas [RTBs]; legumes, rice and small grains [LRS]; and vegetables). The team also identified linkages between ambitions across different functions.

Multi-stakeholder workshop

Co-organized by the NASC, SEEDAN and EKN, the workshop brought together 28 experts that represented various public, research, private, civil-society and farmer organizations. Its objectives were the following:

- Review and verify the seed sector assessment
- Enhance stakeholders' understanding of the framework of seed sector transformation and its use to develop the national seed road map
- Prioritize ambitions for seed sector transformation in crop groups and stakeholder groups
- Draft and elaborate prioritized ambitions into strategic innovation pathways as part of the national seed road map

Prioritization of topics and ambitions

The participants prioritized ambitions in two rounds. They first prioritized in groups with a perspective of crops and crops groups (maize; LRS; RTBs; or vegetables) and next in groups with a stakeholder perspective (FMARD; NASC & NAQS; research & knowledge organizations; private sector; or NGOs & farmer organizations). In each round, participants jointly prioritized within each of the six functions three ambitions and subsequently identified the three most important ambitions across all functions. During the synthesis of the prioritization exercise, the consulting team firstly summed and combined the outcomes of the crop group - and stakeholder prioritization exercises. This provided insight into the priorities within each function. Secondly, the team combined associated topics and ambitions across functions. The combined score provides an indication of the overall priorities, which was further complemented with the cross-functional prioritization. All prioritized topics are presented in the national seed road map and for each the team will elaborate a strategic innovation pathway with aim to support stakeholders to come a stage where the ambition is achieved. Table 1 shares the synthesis of the prioritization. A detailed overview of the prioritization will be shared in the workshop report.

Strategic innovation pathways

To provide inputs to the design of strategic innovation pathways for prioritized topics, participants joined in six groups, balanced in stakeholder representation. Each group covered one function and brainstormed on the design of a strategic innovation pathway for one or two prioritized topics. The discussion was structured as follows:

- What is the current situation?
- What is the ambition (in five years)?
- What are components of a strategic innovation pathway? What steps can be made to result and contribute to the new situation?
- Who are the key stakeholders?
- What kind of tools can be used (e.g. training, studies, business-to-business matchmaking, piloting & scaling)?
- What type of catalyst can lead the process?
- How do you foresee sustainability of the new situation?
- What do you foresee as a measurable 5-year target?

The six groups elaborated strategic innovation pathways for the following topics within each function: (i) extension and (ii) variety development (*service provision*); (iii) seed data and (iv) tackling counterfeiting (*production systems*); (v) marketing & promotion by companies (*market development*); (vi) financial products & services and (vii) quality assurance (*revenue generation & re-investment*); (viii) seed sector strategy (*coordination*); and (ix) plant variety protection (*regulation & management*). The pathways will be shared in the workshop report; the consulting team will use them as basis for pathways part of the national seed road map.

Meeting with development partners

Shortly upon the workshop, the EKN hosted a meeting with several development partners with activities relevant to the seed sector. The following organizations were represented: AGRA, Bill & Melinda Gates Foundation, CARD, GiZ/AFCI, IsDB and JICA. The consulting team shared the outcome of the assessment and the multi-stakeholder workshop. Critical in the presentation was the list of prioritized topics which was linked to ongoing donor supported activities. The consulting team will interact with development partners verifying this mapping, which will be an input to moving forward in the development of the national seed road map and provide inputs for the Nigeria-Netherlands Seed Partnership. Thereby this exercise will ensure complementarity in seed sector development interventions.

Next steps in the review

The consulting team has developed a draft workshop report, which is currently reviewed by the participants. The team is in the process of drafting the document for the

national seed road map. In drafting, the team will elaborate strategic innovation pathways for all topics identified during the assessment and prioritized during the workshop. The team will engage with both Nigerian and global resource persons in a review of the draft strategic innovation pathways. The first draft of the full document for the national seed road map will be available in December 2019, when the team will run a review with workshop participants. The team will consult NASC, SEEDAN and EKN on the final draft document in January 2020, before its final endorsement with these organizations.

Parallel to this process, the team will present the outcomes of the assessment and workshop in a meeting with critical seed sector stakeholders in the Netherlands, which aims to identify strategic innovation pathways for which the Netherlands has a comparative advantage in contributing to the transformation of the seed sector in Nigeria. The national seed road map and the outcomes of that discussion will provide inputs to a document that will shape the development of the Nigeria-Netherlands Seed Partnership.

Table 1: Outcomes of the prioritization of ambitions during the multi-stakeholder workshop

TOPIC (JOINT)	AMBITION (formulated within six functions of seed sector transformation)	TOTAL	TOTAL (JOINT)
Seed quality assurance	Specific standards and protocols developed and implemented for seed quality assurance of RTBs and vegetables	7	15
	Seed quality assurance system effective and sustainable in providing services to different seed producers, companies and agro-dealers	3	
	Sustainable financial structure of quality assurance based on service delivery and thereby being more efficient and effective	3	
	Functional seed regulatory frameworks for RTB/vegetables that take into consideration specific requires for those crops	2	
Seed sector governance & platform	FMARD addresses seed aspects within its value chain structure and/or engages in cross-crop value chains	8	15
	Enhanced structure and governance of the seed sector with distinct separation of institutional responsibilities for governance, regulation and implementation	4	
	Reduced friction between public and private stakeholders' interests in seed sector development	2	
	Established structured and functional seed sector platform	1	
Seed data	Seed companies and other stakeholders have access to accurate industry/market information to inform proper production planning	7	14
	Increased availability and reliability of data on seed and seed business	7	
Extension & crop production practices	Enhanced public and private extension services promoting farmers' use of quality seed of improved varieties	7	13
	Increased farmers' use of more optimal production practices including the use of quality seed of improved varieties	6	
Plant variety protection	Plant variety protection bill is implemented supporting private sector investment	8	13
	Operational plant variety protection	5	

TOPIC (JOINT)	AMBITION (formulated within six functions of seed sector transformation)	TOTAL	TOTAL (JOINT)
EGS supply	Enhanced public and private capacity for EGS supply	5	11
	Enhanced commercial and sustainable public and private structures and processes for EGS supply	4	
	Sustainable and commercially viable public-private partnerships on RTB and SGL EGS production and marketing that support the functioning of seed value chains	2	
	EGS demand forecasting system operational	0	
Infrastructural capacity	Enhanced seed producers' and seed companies' infrastructural capacity	6	10
	Increased investment in the infrastructure of private seed companies for RTB and other crop groups' seed production and marketing	4	
Tackling counterfeiting	Non-genuine seed companies & -traders are out of business	3	9
	Reduced engagement of agro-dealers and seed companies in the marketing of fake seed and increased farmers' trust in agro-dealers and seed companies	3	
	Enforcement of quality assurance and fake seed penalties restricts profitability of non-genuine seed companies and agro-dealers	3	
Marketing & promotion by companies	Seed companies invest in marketing and promotion	8	8
Professional variety development	Enhanced public capacity for variety development with functional research/farmer/market linkages	8	8
Variety release	Efficient and transparent variety release procedures are in place and implemented	3	8
	Enforcement of ECOWAS policy on variety release supports private sector investment	3	
	Reduced costs, efficiency and transparency in variety release	2	
Financial products & services	Available and tailored soft loans, financial products and services for seed companies and seed production & marketing operations	6	7
	Available financial products and services for seed companies and their operations	1	
Crop value chain pulling seed demand	Enhanced structure and functioning of crop value chains, result in increased farmers use of quality seed of improved varieties	4	6
	Food security policies and prices in grain/crop markets enable farmers' profitability and investment; they contribute to increased input use and make it worthwhile to invest in increasing productivity for food crops	2	
Company professionalization & specialization	Seed companies have successfully specialized in specific crops/crop groups	4	6
	Increased professionalization of seed companies/distributors in seed sales of specific crops/crop groups	2	
	Increased number of private seed companies to include RTBs, legumes, rice and/or small grains in their crop portfolio	0	
	Complementary models of seed potato imports and local seed potato production (each supporting distinct potato markets) developed and operational	0	
	Increased availability of new vegetable varieties of international seed companies through local distributors	0	
	Enhanced mid- and long-term business of companies and agro-dealers	0	
	Available business support services for seed companies	0	
	Enhanced seed company capacity in production-, marketing- and financial management	0	
Seed distribution network	Networks of seed companies and agro-dealers ensure delivery of adequate quantities of quality seed at the right time	5	5

TOPIC (JOINT)	AMBITION (formulated within six functions of seed sector transformation)	TOTAL	TOTAL (JOINT)
Community based seed production	Increased, more efficient and sustainable linkages between community based RTB, legume, rice and small grain seed production with research organizations	3	4
	Established business oriented community-based seed production schemes for RBTs, legumes, rice and small grains	1	
Seed trade association	Enhanced SEEDAN structure, functioning and governance, representing different regions, crops and types of seed business	3	3
Alignment of donor interventions	Increased coordination and alignment among donor and development organizations in the seed sector	2	2
Institutional markets	Reduced government, NGO and project subsidies and interventions in the seed market	2	2
	Targets for seed production are based on farmer and market demand, they no longer reflect institutional demands (government, NGOs and projects)	0	
	Reduced distortion of the functioning of seed markets due to reduced interventions by institutional buyers	0	
Seed import	Zero duty for imported seed similar to other agricultural inputs	1	2
	Efficient and transparent seed import conditions at ports and borders support seed business development	1	
	Increased efficiency and transparency in the implementation of the procedures for vegetable seed import	0	
Seed export	NASC is member of international bodies, e.g. UPOV and OECD seed scheme, supporting seed export	1	1

Wageningen Centre for Development
Innovation
PO Box 88
6700 AA Wageningen

T +31 317 486 800
F +31 317 486 801
info.cdi@wur.nl
www.wur.eu/wcdi

Project lead: Marja Thijssen
Marja.Thijssen@wur.nl