



Seed Policy Workshop

Regional Variety Release Update and Launch of the COMESA Seed Regulations Manual

AFSTA, Mombasa, March 6, 2019

Agenda

- Welcome and Introduction (Dr Ian Barker, SFSA; Justin Rakotoarisaona, AFSTA)
- Seeds2B Program (Dr Ian Barker)
- Seed Regional Harmonization: Country Case Studies and Test Cases (Dr Yuan Zhou, SFSA)
- Legal and Regulatory Frameworks for Seed in COMESA, SADC & EAC – update (Katrin Kuhlmann, New Market Labs)
- Launch of the “COMESA Seed Regulations Manual” (Katrin Kuhlmann)
- Discussion
- Coffee break

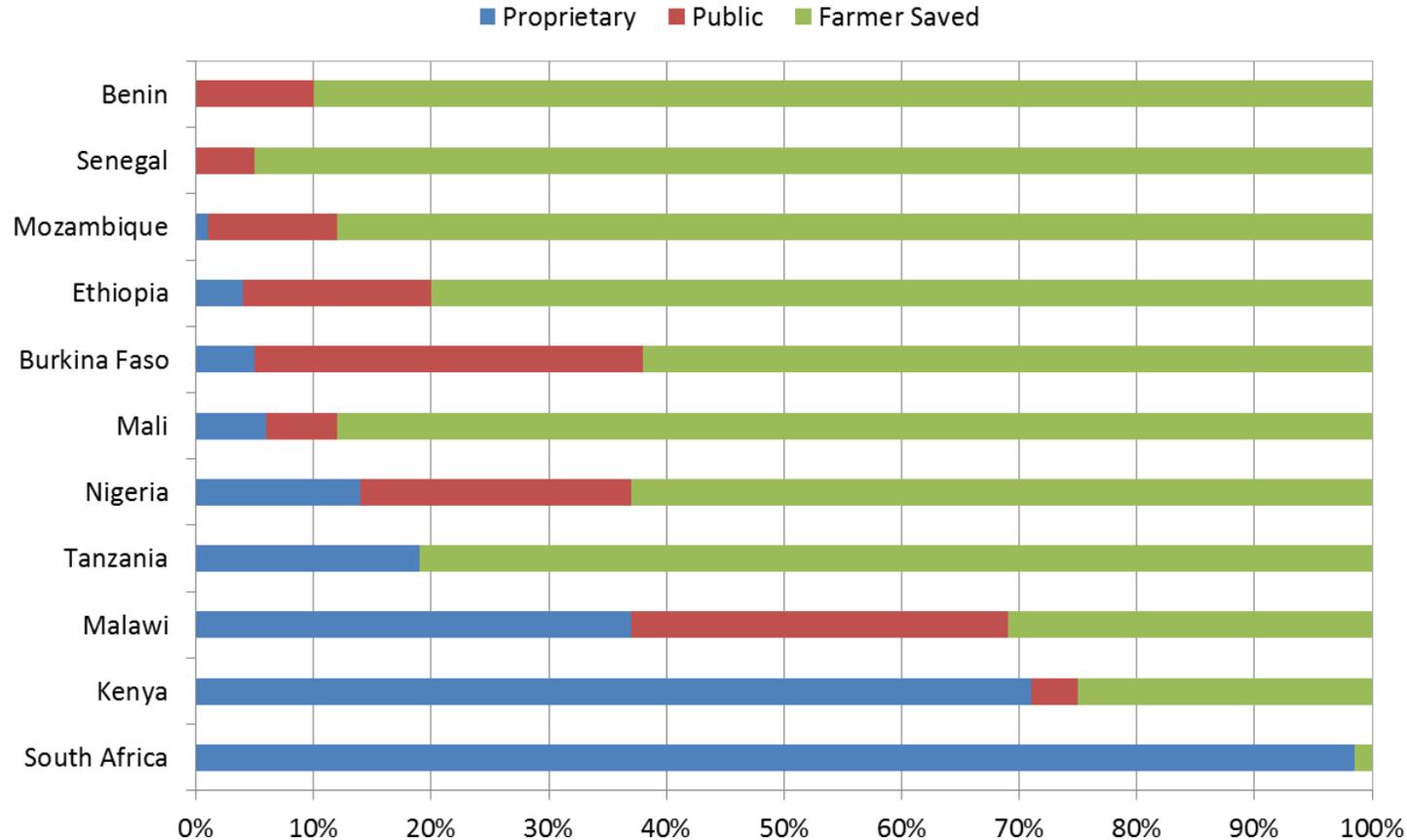
Welcome & Introduction



Seeds2B Program

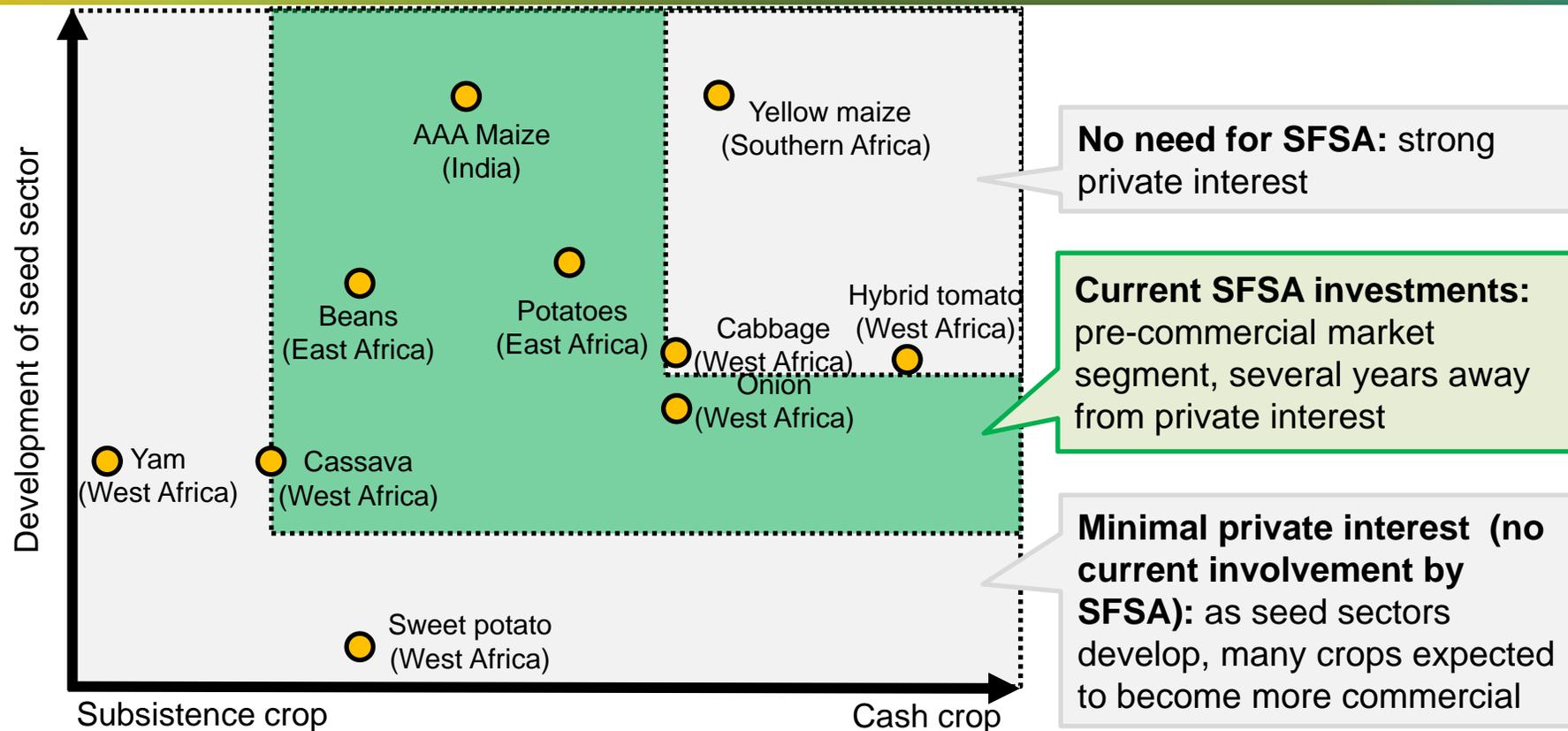
Dr Ian Barker - Head of Agricultural Partnerships

Currently, farmers lack access to both quality seeds and modern varieties



Farmers still using poor quality seeds of the same varieties used by their grandparents
SSA seed sector \$400m (potential \$1.6bn, McKinsey)

Kickstarting seeds markets to close the yield gap



We work in areas of market or institutional failure, responding to requests for assistance & encouraging the private sector to invest (more crops, more marginal markets)

Our menu of services are scalable, in-demand and are generating results for seed companies



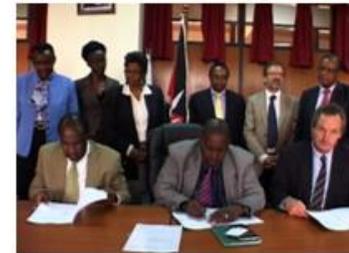
Innovate:
demand-led,
internal or
external IP

- SFSA R&D
- Technology scouting



De-risk:
demonstrate
viability in SHF
sector

- Trials (including market acceptance)*
- Marketing consent*



License:
exclusive/non-
exclusive,
royalty-bearing

- Licensing (royalties returned to NARS or private breeders)



Scale-up:
confident,
sustainable
business
serving farmers

- Technical support*
- Additional capital
- Market links
- M&E

Key: red = menu of services | * = charging

We intend to report our project outcomes externally, whilst tracking key internal key performance indicators: project dashboard



* Estimate based on defined assumptions

Ultimately our partners' success is ours too!

AECF Seeds for Impact Program launch- PPP focus

- First round of the competition launched on 30th October 2018 (physical launch in Accra on 27th November)



- First call 140 applicants-after six weeks, companies will be selected for the next stage
- 12 target countries: Nigeria, Ghana, Mali, Senegal, Burkina Faso, Ethiopia, Kenya, Uganda, Rwanda, Tanzania, Malawi and Mozambique



THANK YOU

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Seeds2B 

Seed Regional Harmonization: Country Case Studies and Test Cases

Dr Yuan Zhou - Head of Agricultural Policy

Outline

- Does regional harmonization matter?
- What progress has been made so far?
- Our observations and findings by RECs and by country
- Take-away messages

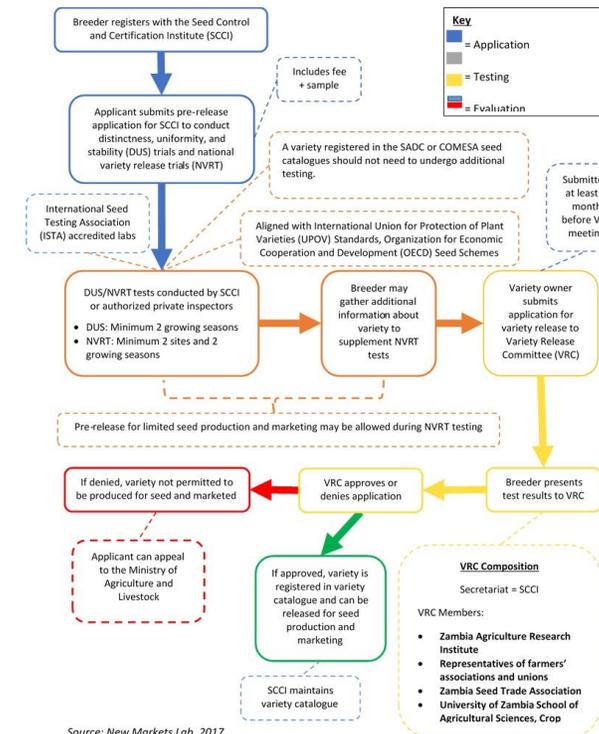
Harmonization helps create a larger and more integrated market

Problem:

- Markets are very fragmented
- Slow variety registration process, high costs
- Each country has its own regulations and rules (limited mutual recognition)
- Many farmers cannot get seeds - the right kind of seeds are unavailable on the market

Time taken to release a maize variety (DTMA, 2009)

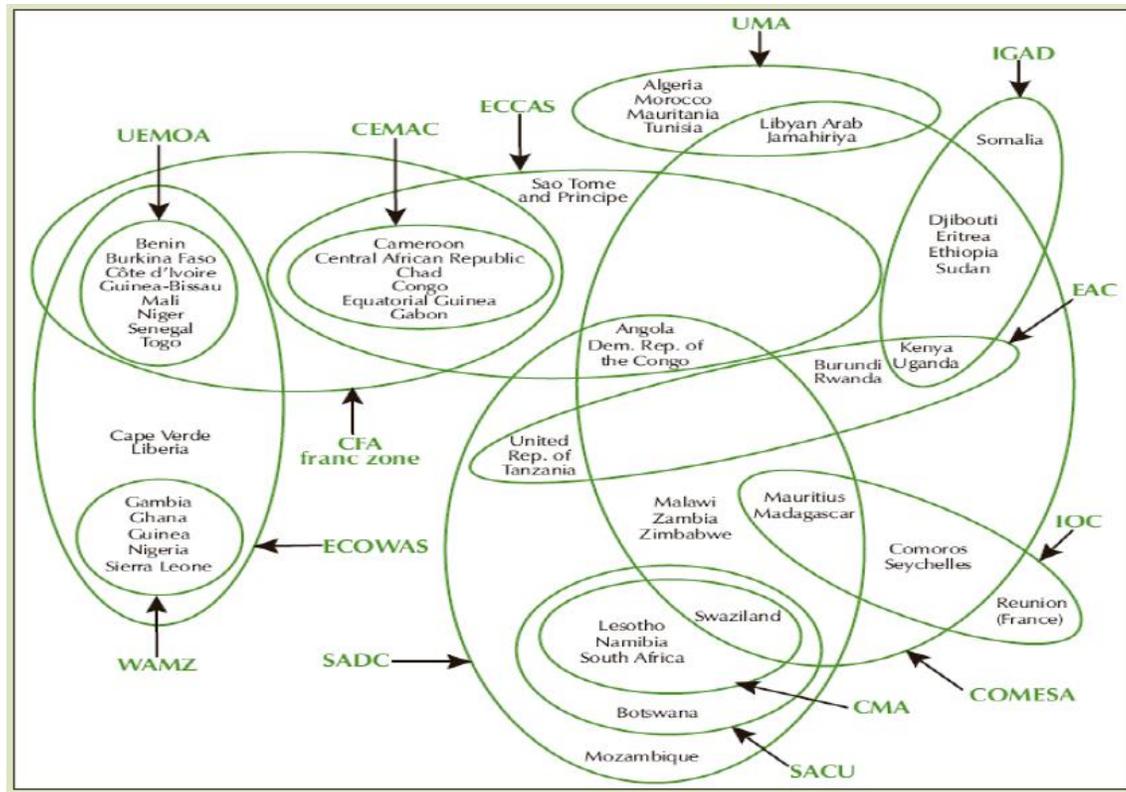
	Actual time to variety release (years)			Time from release to time seed is available to farmers in significant quantities (years)
	Mean	Min	Max	Mean
Kenya	3.1	1.5	6	2.4
Malawi	3	2	7	1.9
Tanzania	2.2	1	3	2
Uganda	2.2	1	4	2.1
Zambia	2.1	1	3.5	2.5
Zimbabwe	2.2	1	3	2.4
South Africa	2	2	2	2.5
Ghana	2	2	2	2
Nigeria	3	4	3	0.03



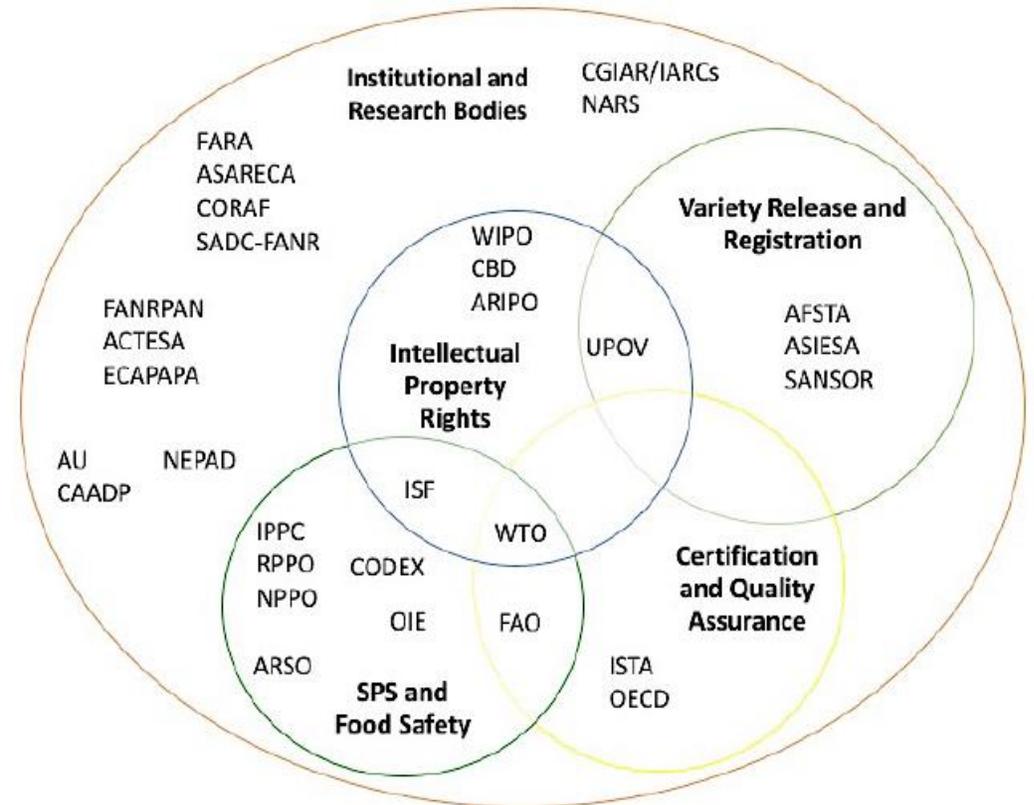
Variety release and registration process in Zambia

Challenges for harmonization at sub-regional level

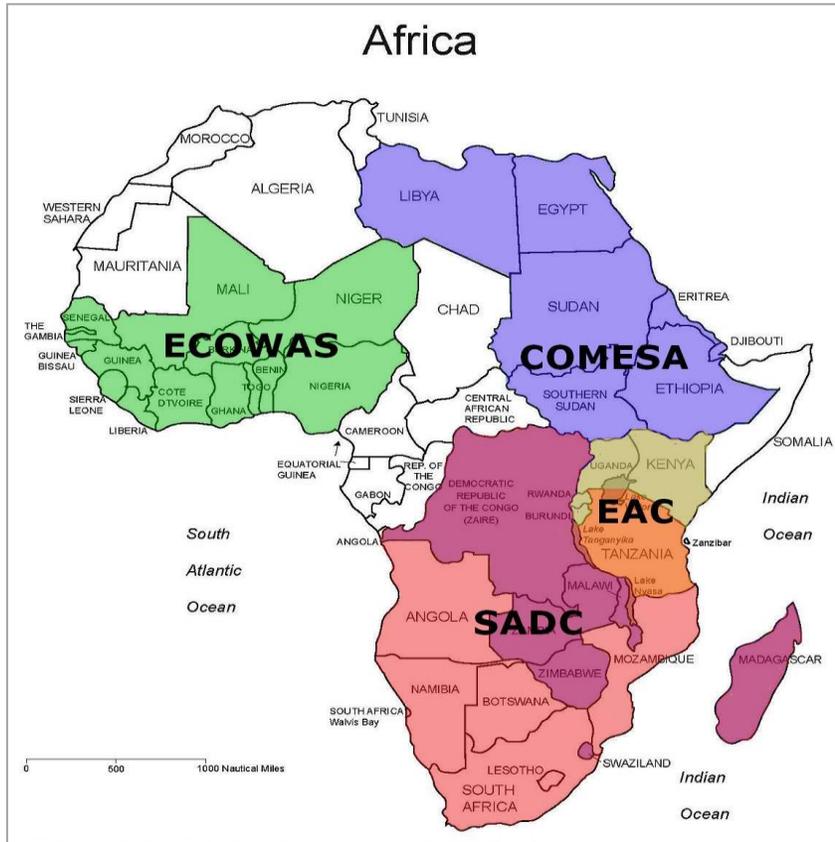
Overlapping Sub-Saharan African Regional Blocks



Interrelationship among institutional Actors



SFSA focuses on four major RECs



Our Toolkit:

- At the national level, we study how seed systems work, identify good practices (Country Case Studies), and advocate for wider adoption
- At the regional level, we address the issue of fragmentation by working on regional harmonization, but implementation remains a challenge
- Test cases with companies to stress-test the system and identify implementation issues as the system develops

ECOWAS (15), COMESA (19), EAC (5), SADC (15)

The latter three have joined the Tripartite Free Trade Area.

NML – SFSA collaboration on regional harmonization

- Harmonizing Regional Seed Regulations in Sub-Saharan Africa: A Comparative Assessment, 2014

- Country case studies to assess the implementation of regional harmonization at national level, 2015-18

- Kenya
- Zimbabwe
- Ghana
- Zambia
- Nigeria

- Regional test cases with seed companies and breeding institutes, 2016-19

- COMESA and SADC Regional Seed Regulations Manuals, 2018-19

Other work: Awareness and Capacity Building; IP licensing

Main observations at the REC level

- Each REC has notable efforts underway. The four RECs (ECOWAS, COMESA, EAC, and SADC) are in varying stages of harmonizing seed variety release and registration, certification, and SPS measures
- The most significant factor affecting implementation is **domestication** - changes in national level legislation or regulation required in order for harmonization to take full effect
- COMESA and ECOWAS regulations are binding upon member states, while SADC's structure (an MOU) is non-binding
- COMESA regional seed catalogue system reportedly user-friendly; SADC process catching up (>45 varieties); EAC has no regional catalogue but release can be expedited; ECOWAS catalogue is the sum of national catalogues of member states

Kenya case study highlights

- Kenya – a member of both EAC and COMESA, a signatory to WTO and UPOV, has ISTA accredited labs
- Well-developed seed legal system and institutions
- Some view the variety release and certification process as lengthy and burdensome
- Recent regulatory amendment authorizes private inspection
- Scratch-off labels launched in October 2017

Going forward

- Accreditation process for inspection & testing: self- regulation
- Streamlining processes for variety release & certification
- Strengthening enforcement of counterfeit seed

Zambia case study highlights

- Zambia – a member of both SADC and COMESA, a signatory to WTO and CBD and has ISTA accredited labs
- Notable strength of the national seed industry and development of seed regulatory system
- Amendments to Zambia's Seeds Regulations in March 2018 - important action to bring its system into regional alignment

Going forward

- Improve regulatory processes for seed import and export procedures (while Zambia's seed system is reportedly relatively efficient)
- Increase regional regulatory collaboration and mutual recognition
- Facilitate cross-border trade in Seed, Germplasm, and Test Data

Nigeria case study highlights

- Nigeria – a member of ECOWAS
- Some gaps exist in seed regulatory system (e.g. no ISTA labs, not UPOV, inspection capacity)
- Discrepancies between Nigeria's national system and the ECOWAS rules
- Seed industry under-developed

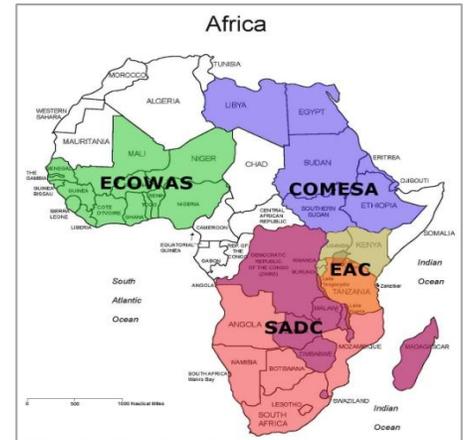
Going forward

- Streamline and increase transparency around regulatory processes for seed. Improvements needed: regulation of the certification process and setting clear quality standards
- Put in place a Plant Variety Protection system
- Implement national laws and regulations to align with the ECOWAS seed system
- Apply Good Practices e.g. accreditation of private seed inspectors, enhancing capacity of public labs

Regional test cases, 2016-18

- We work with seed companies and public breeders to assist them navigate through regional seed protocols:
 - COMESA regional seed catalogue (potatoes*, soybean, maize, groundnuts, sorghum, wheat)
 - SADC regional seed catalogues (potatoes, maize)
 - EAC fast track registration (beans)
 - ECOWAS, marketing consent from member countries (sorghum)
- We have facilitated registration of nearly 30 seed varieties across 7 crops in East Africa, COMESA, and SADC

*First mover in putting potato varieties in COMESA catalogue



Take-away messages

- Regional economic communities (RECs) are in varying stages of harmonizing seed regulations
- Implementation at national/regional levels is still at an early stage; regulatory collaboration important, so is regional collaboration
- We need to highlight country best practices and encourage their adoption more broadly
- Seed companies need to push the process (test cases) & new implementation issues may arise
- It is important to capture and share private sector's experiences in obtaining marketing consent for regionally listed varieties, and ease of doing business



Thank you for your attention!