

Harmonized Seed Regulations

....*our thoughts*

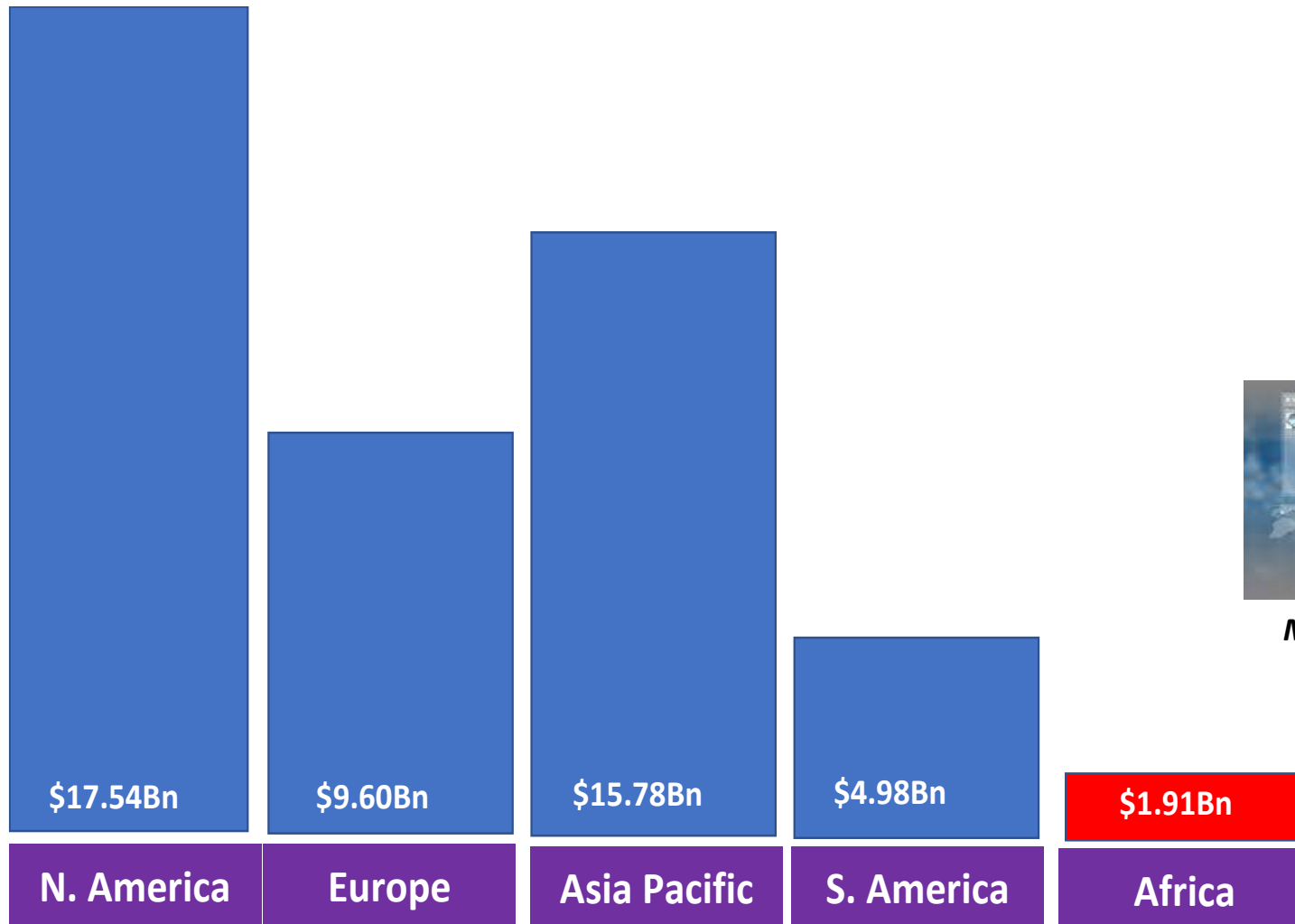


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AFSTA, Cairo, Egypt
1st March 2018

What is Africa's share of Global Seed Market Revenue?



Market insights , 2015



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Is Africa a significant player?

- The value of the global seed market has **tripled since 2000** and reached approximately USD 50 billion in 2014
- Globally, North America occupies the largest market share, and together with Europe, constitutes **more than 50% of the global seed market**
- Currently, the market is highly competitive and top companies are adopting strategies, such as, **mergers & acquisitions**, to increase the share in the seed market
- The global seed market is expected to witness a **CAGR of 7.1% during 2017-2022**. The market, estimated at USD 56.020m as of 2017, is projected to reach a value of **USD 78,764.1m by 2022**
- The **global seed market** is segmented, by geography, into North America, Europe, Asia-Pacific, South America, and **Africa**
- Asia-Pacific, fastest-growing segment, during the forecast period, at a CAGR of **8.2%**, followed by South America. China is the **second biggest seed market** in the world, right behind the US.



What is the business case for for harmonization?



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What are some of the perceived benefits of harmonization?

- Boost Africa Intra-trade – what are the numbers?
- Increase the fragmented regional seed market
- Alignment of national laws with regional laws
- Collectively planning and avoiding or mitigating **risks** that face the agriculture sector in the region
- Giving smallholder farmers in the region better access to quality inputs and related technologies



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What is the bottom line of investment in regional harmonization?

...facilitate the unrestricted movement of seed across national borders; create a regional market for seeds to allow economies of scale and scope in seed production; attract investments in seed multiplication and distribution; and, improve service delivery of seeds to farmers & enhance *sustainable profits for all value chain players*



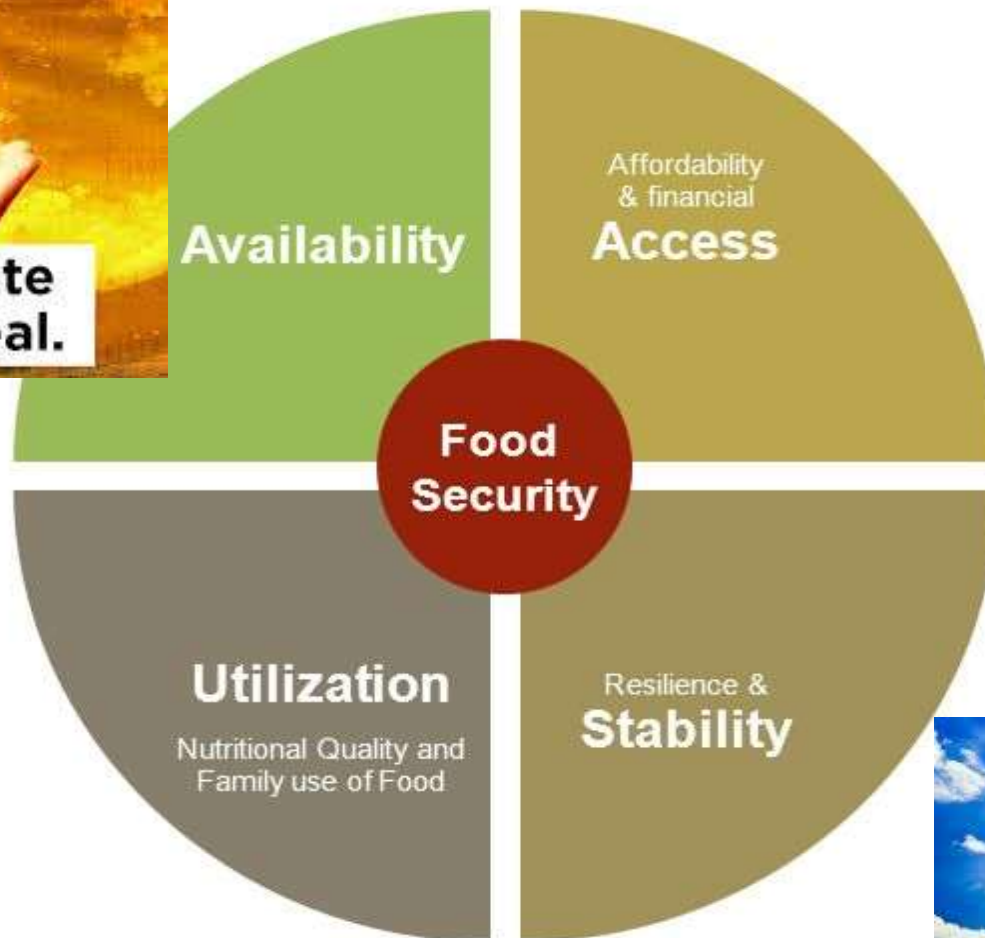
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What is the picture of success? - #s

- Increase in **investment** in regional seed space
- Increase in the **volume and value** of seed trade within & amongst countries
- **Sustainable growth in profits** for all seed industry value chain players
- Improved regional food security and readiness to combat unknowns like climate change
- Roll of a **responsible Africa-wide perspective** of the harmonization initiative



4 Food Security Components



What is the implementation progress of the SADC Seed Regulatory system?

- Formulation 
- Domestication 
- Implementation 

This has to be an Africa-wide chorus call



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