

Nigeria Seed Sector Review

16 March 2020



Nigeria and the Netherlands have agreed to work together on enhancing the performance of Nigeria's seed sector, starting with a seed sector review. This fourth and final project brief informs stakeholders on the document which constitutes the National Seed Road Map (NSRM). We share its purpose and structure, and the next steps towards its endorsement. Given this brief is the final one in the seed sector review, we acknowledge all partners and organizations which have contributed. Furthermore, we provide insights into the development of the Nigeria-Netherlands Seed Partnership (NNSP), for which a proposal has been submitted to the Dutch government.

Purpose of the National Seed Road Map

The NSRM is a strategic policy document that guides stakeholders in the seed sector of Nigeria to work towards an increase in farmers' access to and use of quality seed of improved varieties. The document is a critical input to the development of agricultural policies of the government, while it can also guide the government, seed industry, development partners and donors, and other stakeholders in exploring and agreeing on ways to foster the development of the sector in a coordinated, aligned and structured fashion. The NSRM includes a vision, describes current achievements and challenges, and outlines ambitions and strategic innovation pathways contributing to the realization of those ambitions. The following questions on seed sector performance structure the document: (i) Where are we now? (ii) Where do we want to go? and (iii) How will we get there?

Challenges

The NSRM as a strategic document identifies challenges that are placed within six functions of seed sector transformation; the six functions have been elaborated in the third project brief. Because the structure of the seed sector, and the diversity of crops and situations therein, is very complex, no single response exists to the question



"Where are we now?". Rather, the assembly of challenges structured along the six functions of seed sector transformation responds to this question.

Vision and ambitions

The challenges identified during the seed sector assessment have been synthesized and transformed into ambitions. The NSRM defines an ambition as a desired state or outcome of a transformation process. The collection of ambitions within each of the six functions of seed sector transformation (see the third brief) shapes a future vision in which the seed sector becomes high performing in ensuring access to and availability and use of quality seed of improved varieties of all crops for farmers.

The vision for the seed sector in Nigeria is to be competitive, resilient, profitable, innovative and adaptive, sustainable, inclusive, resistant and transparent. An assembly of 22 prioritized topics, with their ambitions grouped along the six seed sector performance functions, shapes the response to the NSRM's guiding question "Where do we want to go?"

Strategic innovation pathways

The core of the NSRM responds to the final question, "How will we get there?". For each of the 22 topics, the document provides a detailed description of the ambitions and associated challenges. A strategic innovation pathway elaborates for each topic a maximum of five steps/activity groups, unfolding what can be done to achieve the ambition in a sustainable manner. The stakeholders critical to achieving each ambition are mentioned. A catalyst, i.e. an organization that is in the best position to initiate and facilitate the change process, is proposed. Furthermore, each pathway provides reference to the primary policy documents, including the Agricultural Promotion Policy (2016-2020), the National Agricultural Seeds Council (NASC) Act (2019) and the NASC's five-year strategy (2020-2024). To make changes tangible, for each of the pathways a two-, five- and/or ten-year horizon is

described. To illustrate that the proposed pathways are not isolated from developments in Nigeria, Africa and other regions of the world, the description of the pathway concludes with illustrative examples of systemic change processes or situations in which similar ambitions have been achieved.

Steps towards endorsement of the NSRM

The current document has been submitted to the Embassy of the Kingdom of the Netherlands (EKN) and shared with NASC, the Seed Entrepreneurs Association of Nigeria (SEEDAN), and various partners and contributors to the seed sector review. It is foreseen that EKN will work with NASC and SEEDAN towards an endorsement of the NSRM, upon which it can start to serve its purpose to all concerned seed stakeholders including the Federal Ministry of Agriculture and Rural Development and its development partners. It is foreseen that during the upcoming 2020 Annual Seed Connect Conference in Abuja, the NSRM will be presented and endorsed.

You can access the current NSRM document through this link: https://seedcouncil.gov.ng/wp-content/uploads/2020/03/National-Seed-Road-Map_Nigeria-NASC-Adopted.pdf

Nigeria-Netherlands Seed Partnership

The NNSP proposes several interventions areas for collaboration, based upon selected topics and strategic innovation pathways of the NSRM. Taking the NSRM as an entry point for collaboration ensures that the partnership takes a demand driven and systemic approach for sustainably addressing key challenges in the seed sector.

Wageningen University & Research (WUR), Wageningen Centre for Development Innovation (WCDI) proposes in the NNSP to work closely with partners in both Nigeria (NASC, SEEDAN, Sahel Consulting and others) and the Netherlands (Plantum, Naktuinbouw, Wageningen Plant Research and Oxfam-Novib) to ensure strong ownership with key players in the sector. Upon approval of the proposal, WCDI will work closely together with its partners for establishing the larger structure of the partnership.

The following topics have been selected for collaboration: (i) seed sector governance and coordination; (ii) alignment of donor interventions; (iii) institutional markets; (iv) decentralization of seed quality assurance; (v) extension on seed and cultivation practices; (vi) seed company marketing and promotion; (vii) plant variety protection; and (viii) variety release. These topics have been selected since they are priorities for both Nigerian and Dutch stakeholders, whereas other donors are only involved to a limited degree. Moreover, the topics promote Nigerian and Dutch business opportunities and build upon other Dutch funded projects as well as Dutch expertise and experience. Since the proposal

is currently under review the topics mentioned are provisional.

With the NNSP the Netherlands through its government but also its industry, knowledge, regulatory and civil society organizations can support the strengthening of the seed sector in Nigeria, contributing to the country's capacity in fostering the development of the agricultural sector, enhancing food and nutrition security, while also addressing major challenges in the climate crisis.

Seed sector review partners

WCDI has been selected as lead party to conduct the seed sector review. It collaborated with Sahel Consulting, Agriculture & Nutrition Ltd., East-West Seeds and its Knowledge Transfer Foundation, the NASC and the EKN, Abuja. The team ensured continuous consultation with representatives of SEEDAN. The seed sector review was funded by the Netherlands Enterprise Agency (RVO).

Team

The development of the NSRM through the participatory and iterative process was a team effort. In this final brief, we want to acknowledge the team members. NASC's participation was realized through the leadership and support of its Director General, Dr Olusegun Philip Ojo. His technical adviser, Mr Folarin Okelola, provided critical inputs. Mr Ekum Ojogu, who is agricultural development and food security expert with NASC, acted as team member and ensured continuous support and liaison with NASC in the review process. Team member on behalf of Sahel Consulting was Ms Falaq Tidjani, who joined in all activities and facilitated a good meeting of Nigerian and Dutch working styles, and ensured progress and strategic embedding within the Nigerian context. The team further gained through the strategic insights and leadership from Sahel Consultants' founder and managing partner, Ms Ndidi Okonkwo Nwuneli. East-West Seed and its Knowledge Transfer Foundation contributed through Ms Hadiza Yara, Business Development Manager, Kaduna, with her private sector and farmer client perspective, and Mr Stuart Morris, Director of East-West Seed Knowledge Transfer, based in Thailand. Mr Brian Christopher Udoh, Agricultural Policy Officer with the EKN joined the team; he acted as liaison with EKN and facilitated interactions with development partners. During the multi-stakeholder workshop in Abuja and workshops with stakeholders in the Netherlands, Ms Anke van den Hurk, deputy director of Plantum, made valuable and constructive contributions. The team was led by Dr Marja Thijssen, who is senior advisor seed systems with WCDI; she was joined by Dr Walter de Boef, who is global seed system consultant.

Contributing organizations

In the focus group discussions, expert interviews, multi-stakeholder workshops, meetings with development partners, meeting with Dutch seed stakeholders, and expert

review of the draft version of the strategic innovation pathways and draft of the NSRM document, many persons and organizations in Nigeria, the Netherlands and globally have made valuable contributions. Staff of an impressively sized and diverse group of organizations contributed to the participatory and iterative process for developing the NSRM. We are grateful for their contributions: AfriAgri Products; Agritropic Technisem; All Farmer Association of Nigeria (AFAN); Alliance for a Green Revolution in Africa (AGRA); Bakker Brothers; Bill & Melinda Gates Foundation (BMGF); Coalition for African Rice Development (CARD); Da-Allgreen Seeds; Deutsche Gesellschaft für Internationale Zusammenarbeit (GiZ); East-West Seed International; Enza Zaden; Federal Ministry of Agriculture and Rural Development (FMARD); Fruits and Veggies Global Ltd; IFDC/SNV 2SCALE Project; IFDC-Burundi; Institute of Agricultural Research, Ahmadu Bello University (IAR-ABU); International Crops Research Institute for the Semi-Arid Tropics (ICRISAT); International Food Policy Research Institute (IFPRI); International Fund for Agricultural Development (IFAD); International Institute of Tropical

Agriculture (IITA); International Potato Center (CIP); Islamic Development Bank (IsDB); Japan International Cooperation Agency (JICA); Kaduna Agricultural Development Project; Limagrain Seeds; Michigan State University (MSU); Ministry of Agriculture, Nature and Food Quality, Netherlands Government; NABC Seeds4Change Project; Naktuinbouw; National Horticultural Research Institute (NIHORT); National Root Crops Research Institute (NRCRI); Nigeria Agribusiness Group (NABG); Nigeria Agricultural Quarantine Service (NAQS); Oxfam Novib; Plantum; Potato Farmers Association of Nigeria (POFAN); Rahama Integrated Farms Ltd; Resilience BV; Rijk Zwaan; Romarey Ventures Nigeria Ltd; Royal Tropical Institute (KIT); Seed Entrepreneurs Association of Nigeria (SEEDAN); SeedNL; Sia Farms and Industries Ltd; Soybeans Farmers Association of Nigeria; Syngenta Seeds; TechniSeeds Ltd; Value Seeds Ltd; Vitae Seeds Nigeria Ltd; Wageningen Economic Research (WEcR); Wageningen Plant Research (WPR); and Yam Farmers, Processors and Marketers Association of Nigeria.