

# SEEDS OF DEVELOPMENT PROGRAM YEAR 1



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## **SEEDS OF DEVELOPMENT PROGRAM**

### **Project Summary**

#### **Problem Context**

About 70 percent of Sub-Saharan African population lives in rural areas where agriculture is the main source of livelihoods. Persistent poverty is widespread in the rural population and is often exacerbated by poor agricultural practices, climatic changes, conflict, and the HIV/AIDS pandemic. Increased productivity in these agrarian systems complemented by improved access to both input and output markets is key to reducing poverty and improving food security. Pioneering Africa's "Green Revolution" requires increased use of high-yielding crop varieties that can survive harsh terrains and recurrent droughts.

#### **Theory of Change**

Because of their size and local orientation, small to medium sized domestic seed companies have a great potential in meeting the needs of smallholder farmers. However, despite their suitability in serving rural farmers, emerging domestic companies face some competition from formerly subsidized government parastatal that have been privatized or commercialized and from large multi-national companies. Additionally, they have limited financial and managerial resources and are often obstructed by complex and bureaucratic legal frameworks. As infants in the industry, small to medium sized domestic companies need assistance in establishing a solid financial base and developing management capacity. Success of these companies will improve market access to locally adapted and affordable seeds for smallholder farmers resulting in increased productivity, improved food security and ultimately reduced rural poverty.

#### **Project Activities**

After its inception in June 2003, SODP selected ten medium-sized seed companies from Kenya, Uganda, Tanzania, Zambia and Zimbabwe to participate in a Fellows Program that provides management training and consultancy services. This three year program consists of five major activities: workshop training, distance learning, field visits, student attachments and research.

*Workshop Training:* Each year, selected managers from the participating seed companies attend the 'Making Markets Matter' workshop at Stellenbosch University in South Africa. In addition to the general agribusiness management training received by all workshop participants, seed industry fellows participate in specialized activities and sessions designed exclusively for them.

*Distance Learning:* Management modules suitable for the seed industry are made available to Fellows based on identified needs. An online virtual information resource center has been developed to enable timely access to information relevant to the industry.

*Field Visits:* Fellows will visit successful seed companies in developing countries to learn relevant aspects of seed production and marketing. Half of the Fellows will participate in such field visits in the second year and the other half in the third year.

*Student Attachments:* To address specific management and marketing problems facing seed companies while building capacity for the industry, SODP organizes and supports attachments for university students at Fellow companies.

*Research:* Through the Cornell University and regional collaborators, SODP conducts research on the local seed industries to better inform the development of market strategies for improving competitiveness of local small and medium sized companies serving interests of poor farmers.

### **Outputs to Date**

*Workshop Training:* In 2003, the Making Markets Matter workshop was attended by 52 participants from 14 countries. The highly successful and innovative agribusiness workshop covered key areas of management including the following: Marketing, Finance, Supply Chains, E-Commerce, and Community Projects (for more information see [www.marketsmatter.org](http://www.marketsmatter.org)).

*Networking:* SODP has created network opportunities between seed companies in Africa. Through such networking, Fellow companies have established business partnerships that have expanded both domestic and regional market opportunities.

*Websites:* SODP has developed a website designed to be a one stop virtual center providing information to small and medium sized seed companies serving East and Southern African countries. The site includes several links to relevant websites including news briefs, plant breeding institutions, relevant policy publications, seed industry associations, seed companies, (see [www.sodp.org](http://www.sodp.org)). The program is also assisting Fellow companies in developing an internet presence.

*Research:* Two seed industry studies have been initiated at Cornell University examining the market structure and participant conduct of the seed industry in Uganda.

### **Next Steps**

Incorporating lessons learn from the first year, several activities have been planed for program. Capacity building in Fellow companies will continue through workshop training and distance learning targeted at different levels and areas of management. In response to the identified needs, much the workshop training in the second year will target marketing managers from Fellow companies For the top management, a field trip to India has been planned that will expose them to various aspects of seed production and marketing. SODP will continue to support student attachments and conduct collaborative research to strengthen small to medium sized seed companies.

## **INTRODUCTION**

This report highlights the progress of the Seeds of Development Program (SODP) since its inception in June 2003. During this first year, key activities have been carried out as per work plan and some impact is already evident. The fellows program is now fully operational, working with ten seed companies in five East and Southern African countries (Kenya, Tanzania, Uganda, Zambia, and Zimbabwe). The report builds on an interim report that was submitted to the foundation in March 2004.

The SODP consists of five major activities: workshop training, distance learning, field visits, student attachments and research. All activities were designed in consultation with the Managing Directors of selected Fellow companies at our annual Making Markets Matter meeting in September, 2003. This report starts by recapping the program's scope and purpose. Against this background, the key accomplishments to date are summarized. Activities planned for second year are then highlighted and placed in the context of the overall program work plan.

## **PROGRAM SCOPE AND PURPOSE**

The mission of the SODP is to alleviate rural poverty through improved access to appropriate seed varieties and increased on-farm productivity. This goal is accomplished through management training for small to medium sized indigenous seed companies and market analysis of domestic seed industries. The program complements efforts by the Rockefeller Foundation initiated African Agricultural Capital, L.P. that "is interested in investing in well-managed small and medium-sized companies engaged in the delivery of appropriate and affordable crop seeds to farmers in eastern and southern Africa". The specific objectives of the SODP are to:

1. Conduct training that will enhance the management, marketing and supply chain management strategies of small to medium sized local seed companies to improve their market delivery systems for poor farmers;
2. Expose African local seed companies to successful seed market development experiences in Asia to improve their effectiveness in meeting the needs of farmers;

3. Conduct research on the local seed industry to better inform the development of market strategies for improving competitiveness of local small and medium sized companies serving poor farmers.

The above objectives are accomplished through a Fellows Program (objectives 1 and 2) and Research Program (objective 3) coordinated by Market Matters Inc., in collaboration with Stellenbosch University (SU), the Emerging Markets Program (EMP) at Cornell University (CU), local universities and the seed industry stakeholders.

### **SELECTION OF FELLOWS**

The first step in setting up a fellows program was the selection of seed companies that will participate in the program. The target countries were chosen from the core countries of interest for the Rockefeller Foundation. From these, Kenya, Uganda, Tanzania, Zambia and Zimbabwe were the target countries in which the program could yield the highest impact. In each target country, the seed industry was divided into three categories based on size and origins as follows: (1) former government owned parastatals that have been privatized or commercialized, (2) large and well established multinationals, and (3) startup domestic companies. Table 1 shows the seed companies in each of the target countries as by this classification. As justified in the grant proposal, the point of intervention of SODP is the small to medium sized domestic seed companies that can be considered infants in the industry. Because of their size and local orientation, small to medium sized domestic seed companies have a potential advantage in meeting the needs of smallholder farmers. The selection of SODP Fellows was therefore limited to the last column of Table 1. From this list, Fellows were selected based on the compatibility between the company's mission and the objectives of SODP. Specifically, we selected companies with an explicitly stated objective of serving smallholder farmers and contributing to rural poverty alleviation. The final list of Fellow companies is given in Table 2.

**Table 1. Seed Companies in Targeted Countries**

| Country  | Current Seed Producers and Distributors             |  |  |
|----------|---|--|--|
|          | Former Parastatal                                   | Multinationals   | Startup Domestic Companies   |
| Kenya    | Kenya Seed Company<br>Simlaws                       | Pioneer Seeds<br>Seed Co Ltd<br>Pannar Seeds<br>Oil Crop Development Ltd<br>(Faida Seeds)<br>East African Seed Company Ltd | Lagrotech Seed Company<br>Western Seed Company<br>FreshCo Ltd<br>Genetic Technologies Laboratories |
| Uganda   | Uganda Seed Ltd.<br>(former Uganda Seed<br>Project) | Kenya Seed Company<br>SeedCo Ltd<br>Pannar Seeds<br>Monsanto   | Harvest Farm Seeds Ltd.<br>Naseco Ltd.<br>Farm Inputs Care Ltd.<br>Victoria Seeds (new)            |
| Tanzania | Tanseed   | Monsanto, Pannar<br>Kenya Seed Company<br>SeedCo Ltd<br>Pioneer, Cargill<br>East African Seed Company Ltd                  | Suba Agro-Trading<br>Zenobiab Seed Company<br>Sluis<br>East African Seeds<br>Incofin (T) Ltd       |
| Zambia   | Zambia Seed Company<br>(Zamseed)                    | Seed Co Ltd.<br>Pannar Seeds   | Maize Research Institute (MRI)   |
| Zimbabwe | SeedCo Ltd.   | Pannar Seeds<br>Pioneer,<br>Monsanto   | National Tested Seeds<br>Agricultural Seeds and Services<br>AGPY<br>Pristine Seeds                 |

**Table 2. Seeds of Development Program Fellows**

| <b>Country</b> | <b>Company</b>         | <b>Managing Director</b> | <b>Email</b>                |
|----------------|------------------------|--------------------------|-----------------------------|
| Kenya          | Lagrotech Seed Company | Dr. Moses Onin           | lagrotech@lagrotech.org     |
|                | Western Seed Company   | Mr. Saleem Esmail        | western@swiftkenya.com      |
|                | FreschCo Ltd           | Mr. James Karanja.       | freshco@insightkenya.com    |
| Uganda         | Victoria Seeds         | Ms. Josephine Okot       | jo-harvest@infocom.co.ug    |
|                | FICA Ltd.              | Mr. Chris Kaijuka        | fica.project@mail.com       |
| Tanzania       | Suba Agro-Trading      | Mr. Muya                 | satec2000tz@yahoo.com       |
|                | Zenobia Seed Co.       | Mr. Rajinder Mand        | dodomatransport@hotmail.com |
| Zambia         | MRI Seed               | Dr Dusan Ristanovic      | dusan@mriseed.com           |
| Zimbabwe       | Pristine Seeds         | Mr. John Makoni          | john@agpy.co.zw             |
|                | National Tested Seeds  | Mr. Lance Kennedy        | lance-nts@kencor.co.zw      |

The following section gives brief profiles of each of the SODP Fellows highlighting the company's mission, objectives, product range, and contact details. This information was gathered through a visit to all fellow companies in November and December of 2003. Note that despite the common mission to supply quality seeds to smallholder farmers, these fellow companies, vary in size, product range, management structure and operational logistics. The SODP hope that fellows can learn from each other by sharing information. To set a benchmark for evaluating the Fellows Program, baseline data (firm assets, financial statements, market size and target, marketing strategy) on each participating seed company were also collected on that visit.

## LAGROTECH Seed Company



Located in the Kisumu-Kenya, the Lowlands Agricultural and Technical Services (Lagrotech) Seed Company Limited aims at ensuring that seed crops maintain genetic attributes and purity as well as freedom from inert matters, weed seeds and seed borne diseases. The company's key marketed products include maize varieties suitable for marginal to medium altitude areas (Maseno Double Cobber and Lagrotech Early), early maturing bean varieties (KAT B1, KAT B, and KAT X56), and sorghum appropriate for marginal areas (Seredo Sorghum). In addition to these varieties, Lagrotech has an active research and crop varieties research program led by Dr. Moses Onim (a plant breeder) with 30 hybrid maize crosses currently under evaluation. To ensure a comprehensive input supply to smallholder farmers, this fast growing company also stocks fertilizers, agrochemicals and vegetable seeds in addition to their own brands. Lagrotech is driven by a highly motivated, professional and target driven work force.



### Contact Details

Dr. Moses Onin (Managing Director)

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## Western Seed Company Limited



Western Seed Company (WSC) has a mission “to provide quality seed at an affordable price to farmers”. The company supports extension and research related programs countrywide to ensure that farmers reap the maximum benefit from use of its seeds. WSC’s vision, “Prosperity for the farmer” reflects their focus on the farmers and emphasis on poverty eradication. WSC has invested heavily in research and seed production and currently continues to test its new hybrid seed in all Agro-Ecological Zones. The company has embarked on strengthening farmer relation by facilitating adaptive research in farmers’ fields with maximum support on farmers’ field schools. WSC’s product range includes hybrid and open pollinated maize varieties, Sorghum, millet and pigeon peas. Mr. Saleem (MD) believes that his company will eradicate rural poverty in Kenya by increasing farm yields and incomes through access to improved seed at affordable cost.



### Contact Details

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## Freshco Kenya Limited



Headquartered in Nairobi-Kenya, Freshco is a medium scale but rapidly growing company producing and marketing seeds and other planting materials to small scale farmers across Kenya. Their products are developed in liaison with Kenya Agricultural Research Institute (KARI) as source of breeder seed. Freshco was incorporated in 1995 as a subsidiary of Equatorial Nut Processors (ENP), a macadamia nut processing firm. Their product range includes macadamia seedlings and several maize seed varieties. With a mission “to increase the wealth of its shareholders by increasing the wealth of the rural poor through provision of seed and other improved planting materials”, Freshco Ltd, is led by a team of highly competent managerial and technical teams. The company’s performance is measured by a triple bottom-line approach which includes environmental benefits, social benefits and economic benefits to all involved parties. Among its stated objectives, Freshco Ltd strives to integrate poverty reduction considerations into all aspects of their business.



### Contact Details

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Phone: 254-20-3753122

## Victoria Seeds



Headquartered in Kampala-Uganda, Victoria Seeds LTD is a full time seed company, incorporated in October 2003 for the purposes of delivering improved quality seed to small holder farmers who produce over 90% of agricultural output in Uganda. The company serves this niche market by engaging in seed research, multiplication, processing, distribution and marketing. Their current product range includes seeds are for maize, rice, beans, pigeon peas, sunflower, groundnut, sorghum, vegetable and pasture. Victoria Seeds believe that seed is the single essential input in any plant-based agricultural production system, since it determines the upper limit on yield potential and the performance of other inputs. The company's mission is to increase agricultural productivity through sustainable production and marketing of superior seed varieties. The company's varieties are sourced mainly from the National Agricultural Research Organization (NARO). Victoria Seeds has concluded a marketing agreement with PANNAR Seeds for the distribution and marketing of its hybrids and is negotiating with Seed Co Ltd Zimbabwe for the distribution and marketing of its mid-altitude hybrids.



### Contact Details

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## Farm Inputs Care Centre (FICA) Ltd



With head offices in Kampala-Uganda, FICA's vision is to ensure 'that every farmer has access to quality and affordable agro inputs at the right time'. The company's mission is to offer affordable agro inputs to the farming communities through provision of improved seeds, agrochemicals, farm tools and implements under a one stop centre for sustainable agricultural development, job creation, competitiveness and optimal utilization of technologies. FICA's broad range of seed varieties includes maize (six varieties), sorghum (two varieties), finger millet (five varieties), upland rice (eight varieties), small seeded bean (three varieties), large seeded bean (four varieties), soya bean (three varieties), groundnuts (six varieties), and sesame (four varieties). Other products include pasture seeds, fertilizers, herbicides and insecticides. With a large team of professional and dedicated staff led by a visionary director, FICA is set to grow and expand into regional markets.



### Contact Details

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## Suba Agro Trading and Engineering Ltd (SATEC).



Headquartered in Arusha-Tanzania, Suba Agro Ltd. deals with the importation, wholesale and distribution of agro inputs such as agrochemicals, fertilizers, and vegetable seeds. Their head office is located strategically at the central bus terminus in Arusha and they have two branches in Makambako (supplying the southern Highlands) and another in Mwanza (supplying the West and Lake Zone regions). The company offers maize, sorghum and beans seeds. A young and growing company, Suba Agro Ltd. started business in 2000 but has since grown to become a reliable seed producer and distributor with stockists all over Tanzania. The key objective of the company is to expand its business and agricultural services in quantity and quality by opening distribution depots in all key areas in Tanzania. Suba Agro Ltd. currently stocks seven maize varieties that they produce, four maize varieties from SeedCo, five bean varieties, and four sorghum varieties. One of the directors, Mr. James Orondo, was a breeder with Tanzania Wattle company who has helped with an overall view of the seed industry.



### Contact Details

Mr. Mahenye Chacha Muya (Managing Director)

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## Zenobia Seed Company



Based in Arusha-Tanzania, Zenobia Seeds is a three year old startup seed company dedicated to supplying high quality seed to smallholder farmers at affordable prices. Currently, the company produces open pollinated maize and bean varieties with plans are underway to venture into hybrids. With about 4500 acres of farm land, Zenobia has enough capacity to produce all of its seeds thereby having better control of seed quality. They also export high quality pigeon peas to Holland, a project that generates much needed foreign currency. One of the company's objectives is to alleviate poverty through employment generation. To this end, Zenobia Seeds employs hundred of casual laborers, mostly women, in grading seeds. Zenobia is entering into several deals with local and regional seed producers to expand its seed sourcing and distribution network. One of the key markets for their seeds is donor agencies who purchase seed and supply to smallholder farmers. The company enjoys some economies of scope from links with their family-owned transportation company.



### Contact Details

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## MRI Seed



With head offices in Lusaka-Zambia, Maize Research Institute Limited (MRI SEED) is the first and only private seed company in Zambia. MRI SEED is dedicated to: (1) Developing the best quality seed available in the market as measured by yield potential, adaptability to agro-ecological conditions, and adaptability to farming practices, (2) Providing the highest level of customer service, and (3) Maintaining and growing the relationships it has developed with its partners, including seed growers and distribution agents. MRI SEED has been involved in regional maize breeding since 1977 when the company first started co-operating with the Zambian Ministry of Agriculture, Food and Fisheries on the local maize improvement program. Over the years, the company has developed numerous varieties of maize that have been tested and adapted to all the various agro-ecological zones and across all farming systems in use in the sub-Saharan African region. Only the most successful of these varieties have been selected and released for seed multiplication, promotion and distribution to farmers. Currently, MRI Seed varieties are sold through a network of agents, wholesalers and retailers in much of Southern Africa.



### Contact Details

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## Pristine Seeds



With head offices in Harare-Zimbabwe, Pristine Seeds was established in October 2003 as a subsidiary of Pymarc Holdings. Pristine Seeds aims to provide high quality seeds to smallholder farmers thereby improving productivity and reducing rural poverty. In its first year of operation, the company expects about 500 tonnes of OPV maize and about 250 tonnes of OPV sorghum. For its maize and sorghum seed production, Pristine Seeds contracts with five farmers who are paid 10% above the price of grain maize. In this first year of production, the company will also produce cowpea and sugar bean seeds. Pristine Seeds serves as a consultant on matters related to the Zimbabwean agricultural inputs industry. On its Board of Directors is Dr. Tobias Takawarasha, an expert on Zimbabwe's agricultural policy. Pristine Seeds is building a team of professional staff to launch the company and expand the scale of operation.



### Contact Details

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Zimbabwe

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## National Tested Seeds



Established in 1978, National Tested Seeds (NTS) is “dedicated to the production and procurement of the highest quality hybrid and open pollinated seed, both agricultural and horticultural, for local, regional and international markets”. The company has head offices in Harare-Zimbabwe. In 1998, NTS became the first African seed company to be awarded the prestigious ISO 9002 Certification. NTS’s mission is “to be the leading seed house in Africa, recognized globally as the supplier of high quality products that provides exceptional customer service”. Their state of the art seed research and production program ensures variety purity and vigour while minimizing seed borne diseases. NTS is a member of the International Seed Trade Association and acts as an agent to several internationally renowned seed houses. Recently, NTS has been involved in political conflicts with the Government of Zimbabwe that have resulted in massive disruption in operation and heavy seed losses. However, the management is determined to win against all odds even if they have to start afresh.



### Contact Details

Mr. Lance Kennedy (General Manager)

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## WORKSHOP TRAINING

In September 2003, the annual Making Markets Matter workshop was held at Stellenbosch University in South Africa (for details about the workshop, please visit [www.marketsmatter.org](http://www.marketsmatter.org)). The highly successful agribusiness workshop covered key areas of management including the following: Marketing, Finance, Supply Chains, E-Commerce, and Community Projects (see Appendix 1 for a detailed program). In addition to the main facilitators, the program featured the following guest speakers:

- **Ms Venete Klein**, General Manager for Agribusiness at ABSA bank gave a luncheon talk on “Financing Africa’s Agribusiness Sector”. She offered specific strategies and procedures for raising capital from ABSA’s Agribusiness Division.
- **Prof. Sample Terreblanche**, a renowned pan-African professor from Stellenbosch University, provided a thought provoking talk on Africa’s colonial legacy with implications and challenges for Africa’s involvement in the global economy.
- **Hilton Zunckel**, a Senior Researcher at the Trade Law Centre for Southern Africa (Tralac), talked about the implications of the WTO (Cancun) negotiation on Africa’s agribusiness sector.
- **Mr. Strive Masiyiwa**, CEO of Econet Wireless Group, (recently nominated by CNN/Time as “one of the world’s 15 most influential young business executives”) gave an inspiring presentation at the Awards Banquet on the challenges of doing business in Africa.

The Making Markets Matter 2003 workshop was attended by 52 participants from 14 countries in addition to the facilitators. The participant list given in Appendix 2 shows each participant’s name, business/organization affiliation, management position, postal address and email. Because of capacity limitations, some applications had to be turned down, reflecting the growing demand for this workshop as a hallmark of excellence in agribusiness management training. Results from an evaluation survey were generally positive and better than preceding years.

### **Participants' Benefits - Value-Added Programming**

- A series of stimulating market and management seminars presented by world-class facilitators
- A participatory approach involving real companies to present actual market and management case studies
- Access to state-of-the-art information technologies (e-commerce, e-business, e-marketing)
- Access to and interactions with emerging businesses through networking, study tours, and case studies
- A chance to expand strategic thinking and marketing skills
- "After care" business development support services and group consultations
- A developed set of contemporary management and marketing training materials in the handbook

Managing Directors of each of the Fellow companies attended the third 'Making Markets Matter -2003' workshop. To encourage networking, all participants from Fellow companies stayed in the same guesthouse. During the course of the workshop, three meetings were set up to discuss the SODP, brainstorm on issues affecting the seed industry and design a tailor-made program for participating companies. In addition to the general agribusiness management training planned for all participants, a special program for the seed industry Fellows was designed. The program included the following activities.

- Dr Peter Fronemann, the marketing manager from Pannar Seeds(South Africa), gave a presentation to the Fellow participants on his company's organizational structure and marketing strategy.
- Fellow participants were taken on a half day tour to WPK Seeds, a cereal seed producing cooperative in the Western Cape. Participants, toured the plant facilities and asked the plant manager about several aspects of seed production, processing and storage techniques.

## DISTANCE LEARNING

**Workshop Handbook:** At the Making Markets Markets workshop, all participants were given a detailed module covering marketing strategy, financial management, e-commerce, supply chain management and strategic management. Upon returning to their companies, the directors shared the modules with their staff. The modules continue to be used as a reference in management decisions.

**Book on Seed Marketing:** Marketing strategy was identified by all the seed fellows as



a problem area requiring more training. Competition in the seed industry has made marketing strategy a key to survival especially for new companies. Most companies are trying to shift their company philosophies from product-orientation to market orientation. To provide additional market strategy training to the Fellows, SODP has purchased a book on *Seed Marketing* (Mumby,1994) that has been distributed to all fellows. The book abstract is given in the textbox below.

### ***Mumby, G., Seed Marketing, FAO, 1994 (Abstract)***

Increased production of agricultural crops depends not only on the development of higher yielding varieties of seeds but also on the efficiency of the systems available to ensure that these seeds reach the farmer on time. Effective seed marketing is thus an essential component of activities to improve food security. This publication is written from the standpoint of a medium to large private-sector seed marketing company with national or regional coverage. Smaller seed companies, as well as government-owned organizations should, nevertheless, find much in the comprehensive coverage to be of interest and use. The entire range of seed marketing activities is addressed. Methodologies for researching the market are reviewed and approaches to forecasting demand are considered. Ways of best organizing a company's product range to supply demand are then discussed, followed by a review of approaches to seed pricing. The publication considers seed distribution management, and also includes a chapter which reviews techniques of promotion, advertising, extension and demonstration. All of these activities must be planned. A final chapter discusses how best to do this.

## Resource Website:

A web based information resource center has been developed to enable timely access to current information relevant to the seed industry. The website, shown below in figure 1, is hosted at the following URL: [www.sodp.org](http://www.sodp.org). This website gives information about SODP and has links to news impacting Africa's seed industry, agricultural policy, plant breeding, and upcoming events relevant to Fellows. To provide free advertising to our fellows, the website provides a description of each company and where available, links to their website. With regular updating, the website will become a one stop centre that pulls together all available information relevant to the African seed industry. In addition to the website, a special list-serve for all Fellows has been created to facilitate easy information sharing and networking between participants.

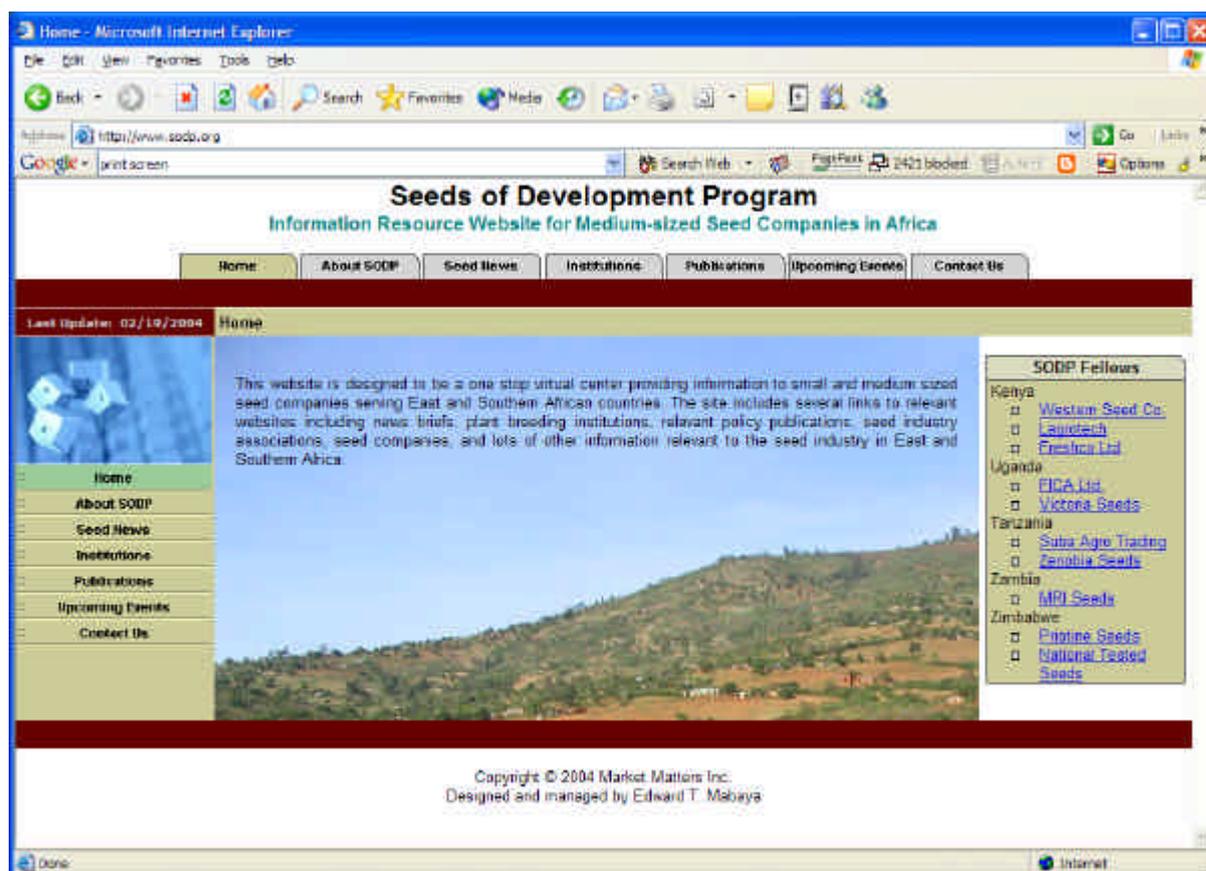


Figure 1. SODP goes online ([www.sodp.org](http://www.sodp.org))

## STUDENT ATTACHMENTS

The SODP believes that creating attachment opportunities for local students with Fellow companies will contribute to long-run capacity building for the seed industry in East and Southern Africa. To this end, the program has set aside small grants to finance attachment with student from local universities. The textbox below highlights a project funded by SODP for students at the University of Nairobi's School of Computing and Informatics to develop website for three of the fellow companies in Kenya (Freshco, Lagrotech and Western Seed Company). The project is currently underway

### **Project Title:**

Creating an Internet Presence for Kenya's Emerging Seed Companies: A Collaborative Initiative Between the Seeds Of Development Program (SODP) and University Of Nairobi's School of Computing and Informatics

### **Project Objectives**

1. To develop the capacity of small and medium organizations in horticulture to exploit ICTs in order to achieve their goals.
2. To create an Internet presence for Kenya's emerging seed companies.
3. To provide readily accessible seed information for African farmers.
4. To develop Kenya students' capacity to provide appropriate, local ICT solutions for small and medium organizations.
5. To foster collaboration between Market Matters Inc. and the University of Nairobi.

### **Project Description**

The project will achieve its goals by developing :

1. A website template and manual for rapid development of simple websites for small and medium organizations in horticulture.
2. Simple websites for one urban and one rural small and medium enterprise in horticulture.
3. Project reports from three students at the School of Computing and Informatics, University of Nairobi.
4. A final project report detailing the problem definition, methodology, literature review, implementation, discussion, results, suggestions for future work, full account of project expenditure.

### **Contribution of Project to Students' Curriculum**

The students will participate in this product as part of their diploma project work. Successful completion of the diploma allows the students to enter the final two years of a Bachelor of Science in Computer Science program at the University of Nairobi.

A team of four students from Cornell University with wide ranging business management background was scheduled to visit Kenya in January 2004. On this trip the students would spend several days with each Fellow company (Freshco Ltd, Lagrotech and Western Seeds) and assist management staff with website design, computerized book keeping, brochure design, marketing strategy and environmental analysis. With all plans in place, the trip was cancelled in mid-December 2003 because of security concerns as the U.S. Department of State's issued a travel warning to Kenya before the holiday season. The trip had to be postponed indefinitely. SODP is currently rescheduling the trip for a time that will be suitable for both students and fellow companies.

## **RESEARCH PROGRAM**

SODP research program seeks to conduct and co-ordinate market analysis of the seed industry in the selected countries. Research findings will be used in guiding market strategies for the seed industry Fellows and informing public policy with the goal of improving service to smallholder farmers.

Three studies have already been initiated at Cornell University. The first is an MPS thesis by Ms. Edith Mutalya that investigates "The role of institutions and Infrastructure in the Development of Agricultural Input Markets in Sub Saharan Africa – A Case study of the Ugandan Seed Industry" (Mutalya, 2004). Completed in October 2003, the study concludes that institutions (private and public) and infrastructure play a pivotal role in the development of efficient agricultural input markets that in turn determine productivity, incomes, food security and poverty rural areas. The second study is another MPS research by Ms. Angella Atuhairwe that investigates "Strategies to Enhance the Sustainability And Competitiveness Of The Uganda Seed Industry. The third study is an MSc thesis study by Helder Zavale investigating the "Structure and conduct of the Seed Industry in Mozambique". Data collection for the last two studies currently underway in the respective countries.

In November 2003, Dr. Edward Mabaya, visited all SODP Fellow companies. He spent at least a day with each Fellow company meeting with the staff, touring the facilities, and getting a better understanding of each company's context and mode of operation. On this visit, baseline information on each company was gathered including history, mission, objectives, organizational structure, operations, products, and market coverage. This information will be used in monitoring and evaluating the program. Dr. Mabaya also met with several representatives from local Universities and other public research institutions to explore opportunities for collaborative research.

### **THE POWER OF NETWORKING**

SODP continues to engage Fellows through workshop training, distance learning, field visits, student attachments and research. While all these activities have enhanced management strategies and thus market delivery to poor farmers, perhaps the greatest achievement of this innovative program is one that the planners had underestimated – The Power of Networking.

- Suba Agro-trading (Tanzania) a relatively small startup company recently won a tender to supply FAO with one million dollars worth of seeds. Not able to supply such volume from its own stocks, Suba relied on SODP Fellows in neighboring countries to meet their demand. They received seeds from Western Seeds in Kenya (worth more than \$60000), FICA Seeds in Uganda (\$85000) and Victoria Seeds in Uganda (65000). “In fact, without the relations we built during our SODP course things could have been very difficult for us.” acknowledges Mr. Muya, the managing director of Suba.
- FICA Ltd. (Uganda) is expanding into highly lucrative regional markets through FreshCo. Ltd. (Kenya) and Pristine Seeds (Zimbabwe). Having a partner in these countries will reduce cost and legal barriers to entry by registering their varieties through local partners.
- Western Seed Company (Kenya) has exported 250 tonnes of sorghum to Tanzania through another SODP Fellow - Suba Agro-trading. They are also exploring opportunities to export some of their OPV maize varieties to Zimbabwe through Pristine Seeds.

- Zenobia Seeds (Tanzania) is taking advantage of its large and well isolated farm to produce maize seed for another local SODP fellow – Suba Agro-Trading. The two companies enjoy some economies of conglomeration by sharing seed processing and storage facilities.
- Pristine Seeds (Zimbabwe) has sourced seed processing equipment from a Zimbabwean supplier for Western Seed Company (Kenya). Pristine also facilitated registration of Western Seed Company varieties in Zimbabwe. The varieties will be marketed in Zimbabwe this year through Pristine Seeds.

The opportunities available to Fellow companies through SODP networking have enabled these small start-up companies to compete at the same level as well established multi-national companies. In a recent email to Dr. Edward Mabaya (the program coordinator), Mr. Makoni, Managing Director of Pristine Seeds, reflected on the possibilities:

“... the potential is enormous, it literally means each company can have a reliable local representative in each of the fellow countries. This opens up the whole of Western, Eastern and Southern Africa as a market for the fellows. Fellows can collaborate on variety registration, market research, staff recruitment, equipment procurement, government regulations, facilitation of exports, comparison of input costs some countries can be good production bases for others based on production costs. For Example I could grow a Kenyan variety because it is cheaper to produce in my country then give it back to the Kenyan to market.”  
(Makoni, 2003)

The CEO of these pro-poor Fellow companies have taken advantage of their linkage through SODP share experiences and develop joint market entry strategies. In response, SODP has adapted its second year program to create more opportunities for networking between fellow through a listserve dedicate to the Fellows ([fellows@sodp.org](mailto:fellows@sodp.org)). Through this listserve, fellows can easily share strategic information and explore business ventures. Further, SODP is creating more opportunities for meeting between management staff in different companies. Additionally, the program is exploring the possibilities of expanding the program’s representation through Fellows in other regional countries such as Mozambique and Malawi.

**UPDATED WORK PLAN** (June 2004)

| Activity                         | YEAR 1   |                     | YEAR 2  |                       | YEAR 3              |                  |
|----------------------------------|--|---------------------|---|-----------------------|---------------------|------------------|
|                                  | First Half   | Second Half         | First Half  | Second Half           | First Half          | Second Half      |
| Workshop Training                | Select fellow companies  | MMM workshop        | Needs assessment  | MMM workshop          | Needs assessment    | MMM workshop     |
|                                  | MMInc., EMP  | SU, EMP, MMInc.     | MMInc., EMP   | SU, EMP, MMInc..      | MMInc., EMP         | SU, EMP, MMInc.. |
| Distance Learning                | Set up website   |                     | Continuous updating of website, virtual chat rooms, interactive tools |                       |                     |                  |
|                                  | Web designer, MMInc.   |                     | Staff - EMP, MMInc., SU, Web designer, Fellows                        |                       |                     |                  |
| Field Visits                     | Selection of hosting companies<br>Preparations for field visit |                     | Group A Field visit   | Preparation for visit | Group B Field visit |                  |
|                                  | MMInc., EMP, Fellows   |                     | MMInc, EMP  |                       |                     |                  |
| Student Attachments              | Select collaborators   | Student attachments |   |                       |                     |                  |
|                                  | MMInc., EMP, SU, Local Collaborating Universities, Students    |                     |   |                       |                     |                  |
| Market analysis and case studies | Select collaborators   |                     | Research and publication  |                       |                     |                  |
|                                  | Staff - EMP, SU  |                     | Staff - EMP, SU, collaborating institutions                           |                       |                     |                  |
| Monitoring & Evaluation          | Collect benchmark data   |                     | Monitoring and Evaluation   |                       |                     |                  |
|                                  | Staff - MMInc.   |                     | Staff - MMInc., EMP, SU, Fellows, Farmers                             |                       |                     |                  |

Key  Completed activity  Activity in progress  Activity not yet started

MMInc - Market Matters Inc., EMP - Emerging Markets Program, SU - Stellenbosch University.

## **APPENDIX 1: MAKING MARKETS MATTER PROGRAM**

### **7 - 12 SEPTEMBER 2003**

#### **SUNDAY 7TH**

- 15:00 **REGISTRATION:** JS Mamis Building
- 17:00 Registration: Die St. al: Danie Craven Centre
- 17:00 **WELCOMING FUNCTION** Die Stal: Danie Craven Centre

#### **MONDAY 8TH**

- 08:00- Registration: 2nd Floor, Schumann Building
- 08:30 **MARKETING MANAGEMENT**
  - Opening & Introduction
  - Case study method - Edward Mabaya
  - Analysing the market environment - Ralph Christy
- 10:30 Tea Break
- 11:00 Market Strategy - Edward Mabaya
  - Case Study
- 13:00 Lunch - BlouKamer, Student Centre
- 14:00 Case study Analysis & Presentations
- 17:30 Evening Function - meet at pick-up point

#### **TUESDAY 9 TH**

- 09:00 **FINANCIAL MANAGEMENT**
  - Financial Management an Introduction -
- 10:30 Norma Tregurtha
- 11:00 Tea Break
- 12:30 Finance Case Study - Steven Hobson
  - Lunch meeting - Le Pommier Restaurant- Ms Venete Klein, ABSA
- 15:00 Case Study Analysis and Presentations
- 17:00 Flex time - Consultation, Shopping, Sport
- 17:00 Bus for shopping depart, from pick-up point

#### **WEDNESDAY 10TH**

- 9:00 **THINKING IN SUPPLY CHAINS**
  - Supply Chain- Key concepts- Moheemad Kaman
- 10:30 Tea Break
- 11:00 Supply Chain Case Studies -
- 13:00 Lunch - Erfurthuis,
- 14:00 E-commerce
- 15:15 Mid-course Reality Check
- 17:45 Participants meet at pick-up point
- 18:30 Evening Function - Goidrof Africa Museum - Prof Sample Terreblanche

## **THURSDAY 11th**

### **GROUP A - COMMUNITY PROJECTS**

- 09:00 Designing and Implementing Successful Communities  
- Ken Robinson and Monique Salomon
- 10:00 Tea Break
- 10:30 Case Study
- 12:30 Lunch Break- Botanical Garden
- 13:30 Field Tour - Kayamandi
- 18:30 Meet at pick-up point

### **GROUP B - SEED INDUSTRY & SMALL BUSINESSES**

- 09:00 Seed Marketing in South Africa - Peter Fronemann
- 10:30 Tea Break
- 11:00 Seed Company Field Tour
- 18:30 Meet at pick-up point

### **GROUP C - WINE INDUSTRY**

- 09:00 Empowerment in the South African Wine Industry
- 10:30 Tea Break
- 11:00 Designing and implementing successful industry empowerment ventures
- 18:30 Meet at pick-up point
  
- 19:00 Banquet  
Evening speaker Mr. Strive Masiyiwa (CEO of Econet Wireless Group)

## **FRIDAY 12 TH**

### **09:30 AGRIBUSINESS MANAGEMENT TOOLS**

- Agriculture, Cancun and The WTO - Hilton Zunckel
- 10:30 Tea Break
- 11:00 Biotechnology, GMOS in Africa (public debate)
- 12:00 Strategic Marketing Synthesis and Summary - Ralph Christy
- 12:30 Evaluation & wrap-up- Angela Ichwan - Josephine Jackson Maletle
- 13:00 Field trip - meet at pick-up point  
Van Rijn Brandy Cellar and Crocodile Leather Tannery

## Appendix 2: Making Markets Matter 2003 – Participants List

|    | <b>Name</b>         | <b>Business/Organisation</b>            | <b>Position</b>                 | <b>Postal Address</b>  | <b>Contact</b>  |
|----|---------------------|---|---------------------------------|--|---|
| 1  | Adams, Garth        | BAWI (SAWBC)                            | Executive Member                | 36 Dahlia Street, Protea Hights, Brackenfell, 7560, South Africa | +27 21 6838840 (t)<br>+ 27 21 6838210 (f)                       |
| 2  | Alvarado, Maria     | MRI Seed Zambia Ltd                     | Director                        | P O Box 33088<br>Lusaka<br>Zambia                                | +260 1 240281 (w)<br>+ 260 1 420275 (f)                         |
| 3  | Blouw, Zilindile    | Wittekkleibosch Dairy Farm              | Canit Manager                   | 596 Long Street<br>Clarksen 6302, South Africa                   | +27 (0) 84 8182227<br>+ 27 42-2952469                           |
| 4  | Bruiners, Charl     | Nederburg Wines                         | Cellar Assistant                | Suzanne Street 4<br>Denneburg, Paarl, South Africa               | + 27 (0) 82 6653 566  |
| 5  | Cassim, Anwar       | Africare                                | Marketing Management Consultant | P O Box 39<br>Pietermaritzbug,3200,<br>South Africa              |   |
| 6  | De Fin, Alexander   | Partners in Development                 | Director                        | P O Box 12236<br>Vorna Valley, 1686,<br>South Africa             | +27 11 8052381 (w)<br>+27 11 8052382 (f)<br>+27 (0) 83 269 9723 |
| 7  | Dzanja, Joseph      | University of Malawi                    | Lecturer                        | P o Box 219<br>Lilongwe, Malawi                                  | +265 1277419 (o)<br>+265 1 277265 (h)<br>+265 1277463 (f)       |
| 8  | Emmanuel, Mubangizi | Farms Inputs Care Centre(Fica) LTD      | General Manager                 | Plot 167 Bombo Road,<br>Kawenpe, Kampala, Uganda                 | +256 41566631 (t)<br>+256 41567159 (f)                          |
| 9  | Esmail, Saleem      | Western Seed Company                    |                                 |  |   |
| 10 | Fischer, Franz      | Farmer Support Group's Micro-enterprise | Micro enterprise advisor        |  | +27 33 3866891  |
| 11 | Friedmann, Ruth     | UCT Graduate School of Business         | Special-Project Co-Ordinator    | UCT GSB, Breakwater Campus, Portswood RD, Green Point 8004       | +27 21 4343084 (w)<br>+27 214340800 (f)                         |
| 12 | Gebengana, Angel    | Tshani Mankosi Fishing and Aquaculture  | Marketing Manager               | Tshani Store, P O Box 232,<br>Ngqeleni,5100                      | 047-5313158   |
| 13 | Jacobs, Pieter      | New Beginnings                          |                                 |  | +27 723532110   |
| 14 | Jordaan, Pieter     |   |                                 |  |   |
| 15 | Kaijuka, Chris      | Farm Inputs Care LTD, FICA Seeds        | Managaing Director              | Plot 167 Bombo Road,<br>P.O Box 34095<br>Kampala, Uganda         | +256 41 566631  |
| 16 | Karanja, Gichanga   | Fresch Co Ltd                           | General Manager<br>Director     | P O Box 27659-00506<br>Nairobi , Kenya                           |   |

|    |                     |                                    |                      |  |   |
|----|---------------------|------------------------------------|----------------------|--|---|
| 17 | Kassier, Ruben      | Jhb Fresh Produce Market           | Business Manager     | P O Box 86007, City Deep JHB 2049                                    | 011-6132049 (t)<br>011-6137381 (f)                    |
| 18 | Kennedy, Lance      | National Tested Seeds              | General Manager      | Box 2705<br>Harare, Zimbabwe   | 09263 4 310284/7 (t)<br>09263 4 331050/ (f)<br>310288 |
| 19 | Khayota, Dr Maurice | Kenyatta University                | Senior Lecturer      | Box 43844, Nairobi, Kenya  | +733 797618<br>811622                                 |
| 20 | Koopman, Naomi      | Maribus, Inc                       | Director             | Protea 30, St Helena Baai,<br>South Africa                           | +27 847352491   |
| 21 | Lange, Gladys       | Anglo American Farms<br>Vergelegen | Senior Cellar Worker | P O Box 17, Vergelegen<br>Wine Estate, Somerset<br>West, 7129        | 021-8471334 (t)<br>021-8471608 (f)                    |
| 22 | Mabena, Magwaza     | CPPP                               |                      | CPPP<br>Kamjekejeke  |   |
| 23 | Mabena, Solly       | CPPP                               |                      | CPPP<br>Kamjekejeke  |   |
| 24 | Mafhefho, Shonisani | Nerpo                              |                      | Nerpo<br>P O Box 36802<br>Menlopark, Pretoria, 0102                  | +27 31 2938028 (w)                                    |
| 25 | Mahlase, Ellen      | CPPP                               |                      | CPPP, Box 1234, Halfway<br>House, 1685, South Africa<br>Komjekejeke  | +27 11 3133324<br>+27 11 313 3852 (f)                 |
| 26 | Makola, Deborah     | Nerpo                              |                      | Nerpo<br>P O Box 36802<br>Menlopark, Pretoria, 0102,<br>South Africa | +27 12 361 9127 (w)<br>+27 12 7028036 (h)             |
| 27 | Makoni, John        | Agpy P/L                           | Managing Director    | P O Box 66024<br>Kopoe, Harare, Zimbabwe                             | +263 4 667511/2 (t)<br>+263 4 668770 (f)              |
| 28 | Makungo, Mbulaheni  | CPPP                               |                      | CPPP<br>Khiwane  | + (0) 82 744 6268                                     |
| 29 | Maswana, Ndiliswa   | Nerpo                              |                      | Nerpo<br>P O Box 36802<br>Menlopark, Pretoria, 0102,<br>South Africa | +27 (0) 73 2344368                                    |
| 30 | Mkhize, Slondile    | CPPP                               |                      | CPPP<br>Phezukokhono   |   |
| 31 | Mnguni, David       | CPPP                               |                      | CPPP<br>Khiwane  | +27 (0) 72 2972709                                    |

|    |                              |  |  |   |  |
|----|------------------------------|--|--|---|--|
| 32 | Mpandeli, Edison             | <b>CPPP</b>                                    |  | CPPP<br>Phezukokhono  | +27 (0) 72 136 9544                        |
| 33 | Mrubata, Buyisile<br>Freeman | Nerpo  |  | Nerpo<br>P O Box 36802<br>Menlopark, Pretoria,0102                          | +27 (0)84 8118109                          |
| 34 | Mthethwa,<br>Khethomuhle     | <b>CPPP</b>                                    |  |   |  |
| 35 | Muhara, Johnson              | Equatorial Nut<br>Processors                   | General Manager                          | PO Box 27659, 00500 Nairobi,<br>Kenya                                       | +254-20-3753122 (t)<br>+254-20-3753124 (f) |
| 36 | Muya, Mahenye                | Sub Agro-Trading                               | Managing Director                        | Box 14702, Arusha, Tanzania   | +255 744278408<br>+255 272548541           |
| 37 | Mwale, Jacob                 | Cap Consulting                                 | Manager                                  | Box 51206, Ridgeway, Lusaka,<br>Zambia                                      | +(0) 86 735185<br>+ 265 1 284224           |
| 38 | Ncedani, Noluvuyo            | CPPP   |  | CPPP, Box 1316, East London,<br>South Afirca<br>Khiwane                     | + 27 43 7435305<br>+(0) 82 3269336         |
| 39 | Ngcamama, Xolile             | CPPP   |  | CPPP, Box 1316, East London,<br>Tourism Initiative, South Africa<br>Khiwane | +27 (0) 83 6578805                         |
| 40 | Nkwe-Mosele,<br>Annastacia   | National Food<br>Technology<br>Researchcent    | Senior Extension and<br>Training Manager | Private Bag 008<br>Kanye, Botswana  | 00267-5441159 (t)                          |
| 41 | Okot, Josephine              | Harvest Farm Seeds                             | CEO                                      | Plot 34/36 Kibira Rd, Box 8166,<br>Kampala, Uganda                          | +256 77467365<br>71467365                  |
| 42 | Onim, Dr Moses               | Lagrotech Seed<br>Company                      | Managing Director                        | BOX 1244, Kisumu, Kenya   | +254 5741440                               |
| 43 | Pieterse, Christie           | Cape Olive Trust                               | Production Foreman                       | P O Box 91<br>Hugenot<br>7645   | 021-8683120(w)<br>021-8682895 (f)          |
| 44 | Prins, Johnny                | National Department of<br>Agriculture          | Economist                                | Private Bag X237<br>Pretoria,0001   | 012-3197185 (w)<br>012-3196693 (f)         |
| 45 | Mand, Rajinder<br>Singh      | Zenobia Seed Co.                               | Director                                 | 114 Arusha, Tanzania  | +255 2506323                               |
| 46 | Ristanovic, Vladimir         | MRI Seed, Zambia                               |  | P O Box 33088, Lusaka   | dusan@mriseed.com                          |
| 47 | Sakala, Andrew               | Norad Support to Farmer<br>Association Project | Project Accountant                       | P O Box 30395<br>Lusaka, Zambia   | 09260 1 262936 (t)<br>09260 1 262950 (f)   |

|    |                         |                        |                           |  |                                    |
|----|-------------------------|------------------------|---------------------------|--|------------------------------------|
| 48 | Siphugu, Lufuno         | Nerpo                  | Assistant Manager         | Nerpo<br>P O Box 36802<br>Menlopark, Pretoria,0102 | +27 (0) 83 2063113                 |
| 49 | Soyizwapi, Sipiwo       | Singisi Forest Product | Director                  | P O Box 11, Umtata,<br>5099                        | 0837269722<br>047-5313158 (f)      |
| 50 | Sulvester, Barend       | Cape Olive Trust       | Assistant Farm<br>Manager | P O Box 91<br>Huguenote, 7645                      | 021-8683120 (t)<br>021-8682895 (f) |
| 51 | Visagie, Pieter         | Trout Farming          |                           | Lynestr 128, Worcester, South<br>Africa            | +27 (0) 73 1886998                 |
| 52 | Williams, John<br>Henry | Kuikenvlei Vineyards   | Foreman                   | P O Box 5745<br>Helderberg, 7135                   | 021-8422944(w)<br>021-8422560 (f)  |