SEEDS OF DEVELOPMENT PROGRAM

ANNUAL MONITORING AND EVALUATION REPORT
December 2008

Market Matters INC.

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COVER PHOTO

Saleem Esmail from the Western Seed Company in Kenya and Captain J. Gichanga Karanja from Freshco Seeds in Kenya exchanging ideas during the eight annual Making Markets Matter Workshop in Somerset West, South Africa.

Both Mr. Esmail and Capt Karanja are SODP Fellows.

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1. INTRODUCTION

This report summarizes the findings of the annual monitoring and evaluation exercise conducted by the Seeds of Development Program (SODP) to track the performance of the program and its contribution to the participating companies and to the smallholder communities in their areas of operation.
The report opens with an overview of the Seeds of Development Program and the activities offered by the program. Next, it provides some background on the monitoring and evaluation exercise conducted for the year 2008, followed by a detailed report of the program activities and the performance indicators for the program overall and by country. The concluding section reports on SODP Fellows' views about the benefits of the program and their suggestions for future improvements. (All of the events reported on in this document took place in 2008. However, the performance indicators listed below capture data from 2007 and 2008: because this annual evaluation is conducted in August of each year, no final figures are available for the current year yet. Instead, we ask companies to report actual figures for the previous year and projected figures for the current year.)

2. THE SEEDS OF DEVELOPMENT PROGRAM

2.1 About the Seeds of Development Program

The Seeds of Development Program was initiated in June 2003 with a mission to alleviate rural poverty through improved access to appropriate seed varieties and increased on-farm productivity. The program is a collaborative effort by Market Matters Inc. (a nonprofit organization based in Ithaca, NY, USA), Cornell University's Emerging Markets Program, Stellenbosch University, and local universities and seed industry stakeholders.

The program seeks to accomplish its mission through two programming areas: management training for small and medium-sized indigenous seed companies and market analysis of domestic seed industries. Twenty-five small-and medium-sized seed companies and National Agricultural Research Organization (NAROs) in eight countries (Kenya, Malawi, Mali, Tanzania, Uganda, Zambia, Mozambique and Zimbabwe) currently benefit from the program. Participating companies are referred to as "Fellows."

The program primarily targets indigenous seed companies that are working with smallholder farmers and other stakeholders in the seed industry. The SODP aims to alleviate rural poverty through improved access to appropriate seed varieties and increased on-farm productivity. The specific objectives of SODP are fourfold:

- To expose African-owned seed companies to successful seed market development experiences in order to improve their effectiveness in meeting the needs of farmers;
- To conduct training that will enhance marketing and supply-chain management strategies of small-to-medium sized local seed companies thereby improving their market delivery systems to serve poor farmers;
- To conduct research on the seed industry to better inform strategies of the local small and medium sized companies that serve poor farmers.
- Improve access to capital by locally owned seed companies in sub-Saharan Africa so as to improve their production and marketing capacity.

The size distribution of SODP Fellows as measured by annual sales revenue is depicted in Figure 1 below.

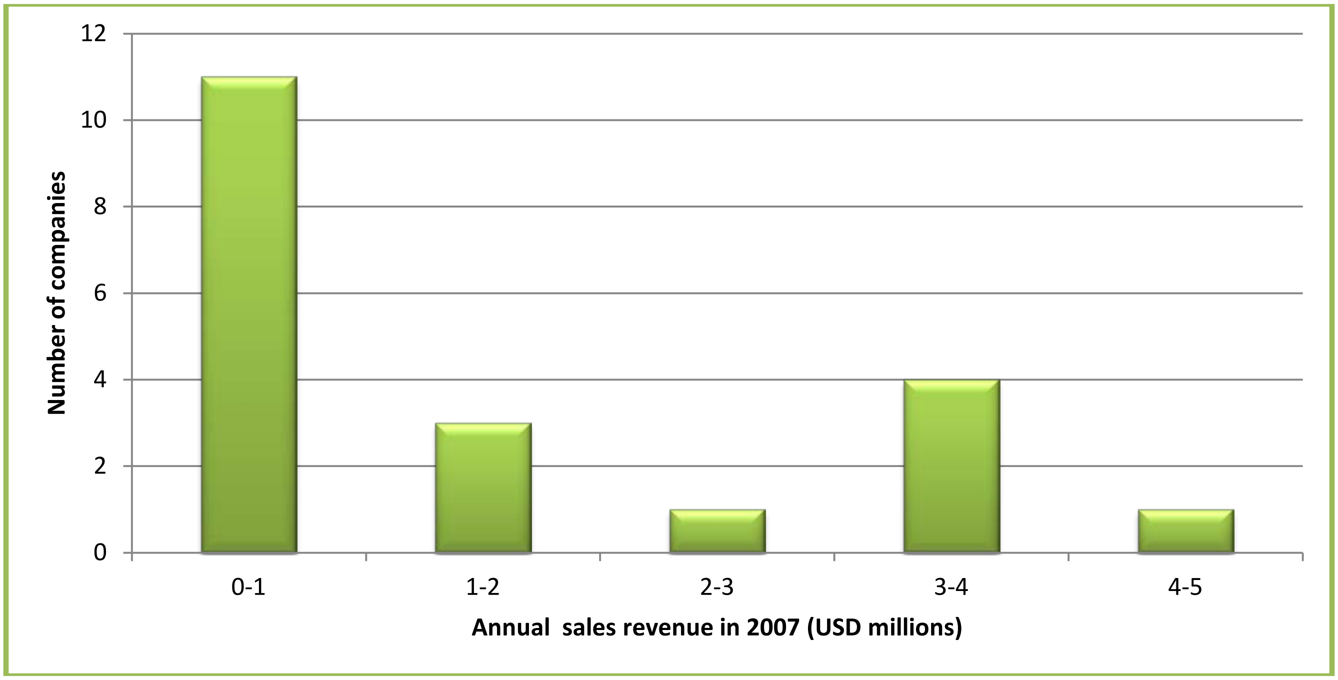

Figure 1: Annual sales revenues of SODP Fellows companies.

2.2 Seeds of Development Program Activities

Small and medium-sized seed companies that serve smallholder farmers in Africa are carefully selected to become members of a Fellows Program. SODP objectives are accomplished through five major capacity building, networking and research activities: Workshop Training, Field Visits, Seed Trading Forum, and Research. In 2008 the program featured the following activities: a technical workshop on seed quality control, a business training workshop (Making Markets Matter 2008), the Seed Trading Forum, field visits to other seed companies, and research (market analysis).

Workshop Training – Business management and technical training

Each year, selected managers from the participating seed companies attend an executive agribusiness management training workshop – the Making Markets Matter workshop in Stellenbosch, South Africa. Starting in 2006, an additional workshop, exclusive to seed companies has been added to address technical aspects of seed production and distribution.

Field Visits

Fellows visit successful seed companies countries with a more advanced seed sector to learn about relevant aspects of seed production and marketing and to explore business opportunities.

Seed Trading Forum

Every year between harvest and the next planting season, SODP brings together managers from participating companies to network and explore opportunities for seed trading and other collaborative initiatives.

Research

Through the Emerging Markets Program at Cornell University, SODP conducts research on seed systems in Africa. Research findings are used to guide strategies by private companies and to inform public policy.

3. ANNUAL MONITORING AND EVALUATION

The outcomes and successes of the Seeds of Development Program are most evident in the program's direct impact on participating companies. To measure this impact, the program conducts an annual monitoring and evaluation exercise. The majority of the information for the M&E is collected through a questionnaire submitted by SODP Fellows, in which they report on key performance indicators, including number of employees, number of seed growers, area under seed production and multiplication, number of varieties offered, peak seed processing capacity, seed production, seed sales, domestic market share, sales revenue, average sales breakdown by market type and product type. Besides the key performance indicators the participating companies are asked to rate each activity offered by SODP for its usefulness and applicability for the company.
The following section summarises quantified performance indicators that measure the performance of the program.

3.1 EVALUATION OF PROGRAM ACTIVITIES

The Seeds of Development Program companies were asked to indicate if a number of activities offered to the SODP fellows had been beneficial their companies. Figure 2 summarises the SODP Fellow's responses to a number of questions. From this graphical representation it is notable that generally speaking the Fellows report that all the activities offered by the SODP program are beneficial to their businesses. The three most useful activities as identified by Fellows are i) the annual business training offered through the Making Markets Matter workshop series, ii) field trips to other seed companies, and iii) networking events like the annual Seed Trading Forum.

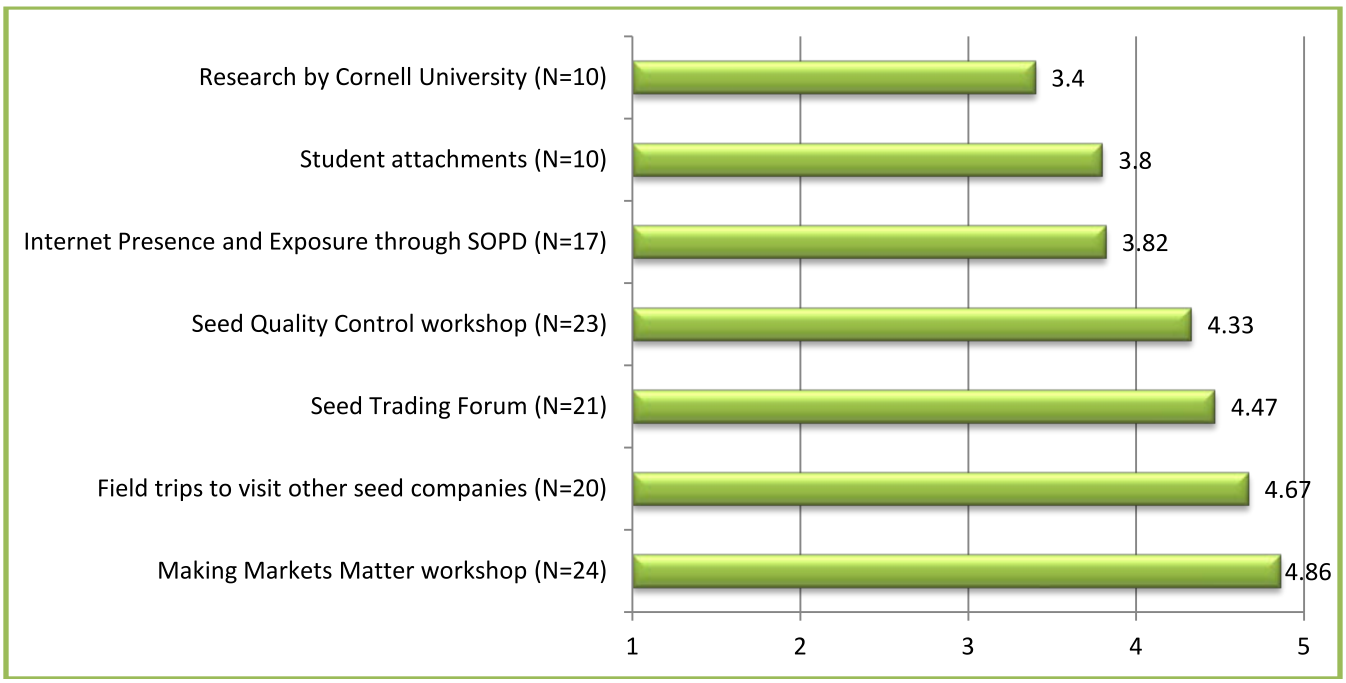

Figure 2 : Fellows' evaluation of SODP activities. (1= not valuable; 3=neutral; 5=highly valued.)

3.2 FELLOWS' PERFORMANCE INDICATORS

3.2.1 Overall indicators

SODP's outcomes and successes are most visible in the performance indicators of the participating companies. This section summarises selected and quantified performance indicators that measure the performance of participating companies.

Table 1 presents the average performance indicators of SODP Fellows in 2007 and those expected in 2008. These statistics show growth by SODP Fellows as measured by number of employees, number of seed growers used, number of varieties offered, seed processing capacity and sales revenue. While it is not possible to assign all growth to SODP interventions, it is important to note that the rate of growth for most growth indicators increased after the companies had joined the program. To distil the impact of SODP intervention would require a statistical analysis that would compare similar sized companies that are Fellows vs. non-Fellows. Data available at this time is insufficient to conduct such quantitative analysis.

Table 1 : Total Performance of the Seeds of Development Program

Variable		2007	2008 (Expected)	Change (%)
Number of employees	Permanent	482	628	+24.66
	Casual / seasonal	2257	2916	+23.86
Number of seed growers used		1345	1710	+27.14
Number of seed varieties offered		263	417	+43.45
Seed peak processing capacity (tons per day)		337.5	401.5	+18.96
Total seed production (tons)		17922	17191	-8.65
Seed sales (tons)		18187.19	18291.63	-9.00
Sales revenue (US $)		21,495,935.50	25,695,270.80	+14.75

Considering the total performance of the Seeds of Development Program as summarised in Table 1 it is notable that the program continues to grow in a number of key areas. As one of the primary indicators, the total annual sales revenue of companies in the program is expected to increase by 15%, from US$21.5 million to US$ 25.7 million. In addition, the number of permanent and casual employees, the number of seed growers used, the number of varieties offered, and the peak processing capacity are some of the indicators that show significant increases between 2007 and the expected performance in 2008. Of specific interest is that the numbers of seed varieties that are offered are expected to increase by 43% and the numbers of seed growers that are used are expected to increase by 27%.

The reduction in total seed production and seed sales that is observed may be partially be ascribed to suboptimal production conditions in some regions. Some Fellows report that drought conditions or the incidence of diseases has impacted on the production of seed during the 2007/2008 period and consequently less seed is produced and less seed is available for sale.

Figure 3 graphically illustrates the changes between 2007 and 2008 in several performance indicators.

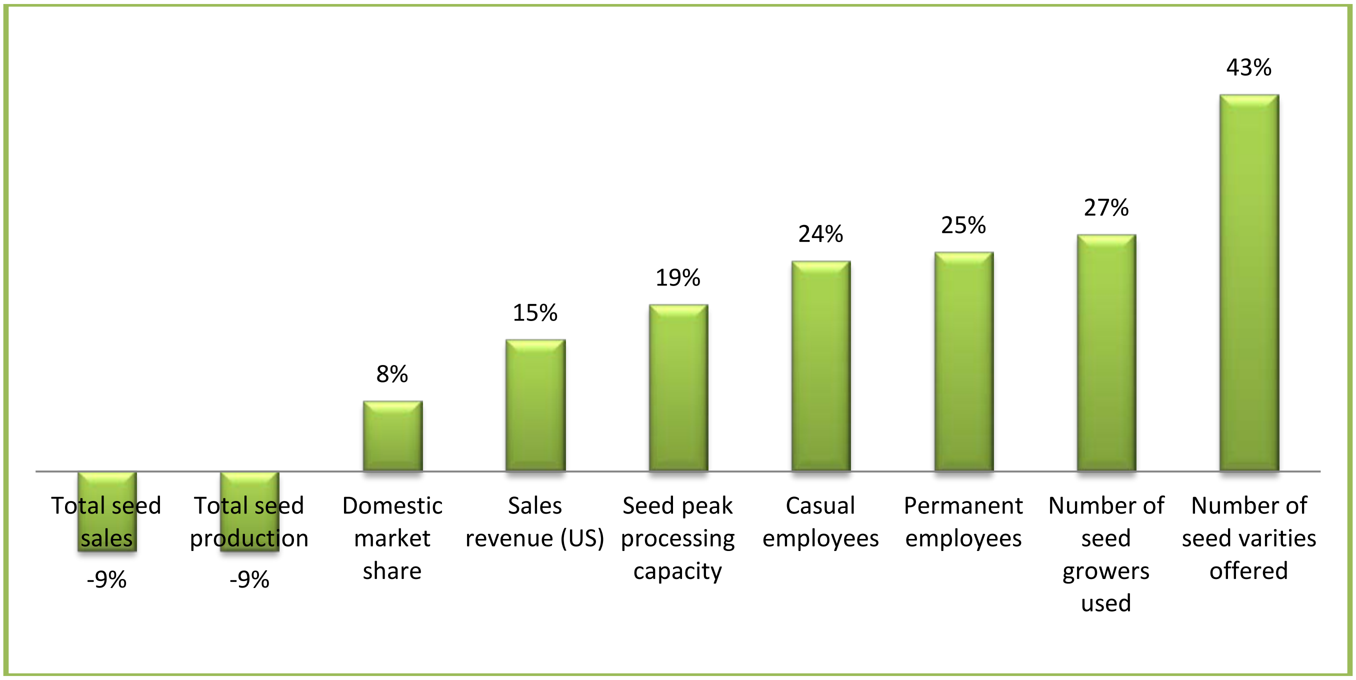

Figure 3: Changes in average performance indicators from 2007 to 2008

3.2.2 Sales breakdown

Fellows were also asked to report their sales breakdown by market segment and by product type. These variables do not relate directly to company performance but are important in illustrating the core business and target market for SODP fellows and how these SME seed companies are contributing to changing the agricultural landscape in Africa by improving access to improved seed by smallholder farmers.

Table 2 summarises company sales breakdown by market segment. A number of interesting trends are evident from Table 2. First is that SME seed companies' primary target market is smallholder farmers, with 80% of expected sales during 2008 going to smallholder farmers. This consists of 66% direct sales to smallholder farmers and 14% of indirect sales through relief and nongovernmental organisations that eventually channel the seed to smallholder farmers. Secondly, the significant share of sales directly to smallholder farmers is evidence that SME seed companies are not solely reliant on the NGO/relief market and that the market for seed in Africa is becoming increasingly market driven. Further evidence of a growing market driven seed sector is the 31% reduction in sales to relief and nongovernmental organizations and an increase of 10% in direct sales to smallholder farmers and an increase of 103% exports evident in Table 2 and Figures 4 and 5.

Table 2 : Changes in total Performance Indices year on year from 2007 to the expected performance in 2008

Sales breakdown by market segment	2007	2008 (Expected)	Change (%)
Commercial farmers	11.46 %	10.21 %	-10.91
Smallholder farmers	56.75 %	65.52 %	+10.15
Relief / NGO	20.64 %	14.27 %	-30.90
Export	6.38 %	13.07 %	+103.92

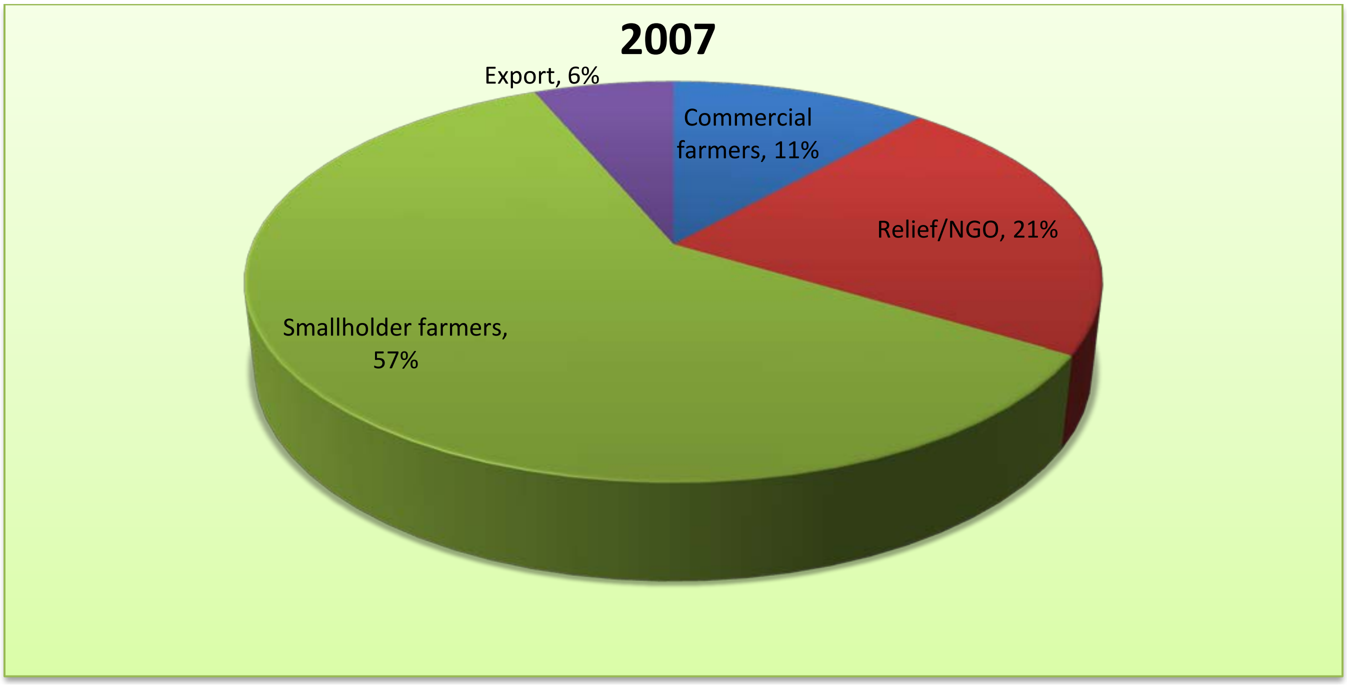

Figure 4 : Sales breakdown by market segment (2007)

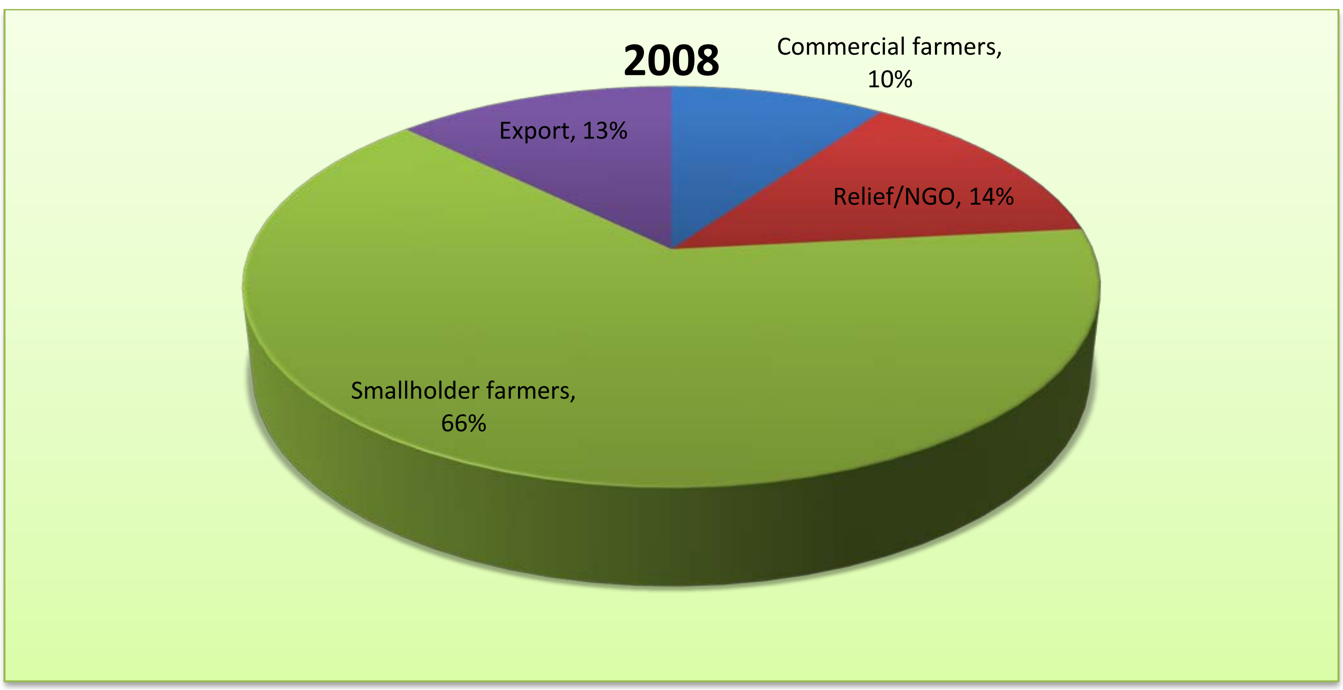

Figure 5 : Sales breakdown by market segment (Expected 2008)

Table 3 summarises company sales breakdown by product type. From this summary and the illustrations in Figures 6 and 7 it is evident that seed remains the core business for SODP Fellows with seed sales expected to account for 77% of total sales revenue. Many companies, however, have a portfolio of products including agrochemicals, farm implements and other activities that also contribute to total sales and at the same time provide a tool to mitigate some of the risks associated with a single activity. Foremost of these products is agrochemicals, whose contribution to total sales is expected to increase by 51% in 2008 to ultimately contribute close to 13% of total sales for SODP companies.

Table 3 : Sales breakdown by product type

Sales breakdown by product type	2007	2008 (Expected)	Change (%)
Seeds	77.55 %	79.17 %	+2.02
Agrochemicals	7.27 %	10.88 %	+49.53
Farm Implements	1.82 %	2.00 %	+10.00
Other	8.82 %	7.96 %	-9.73

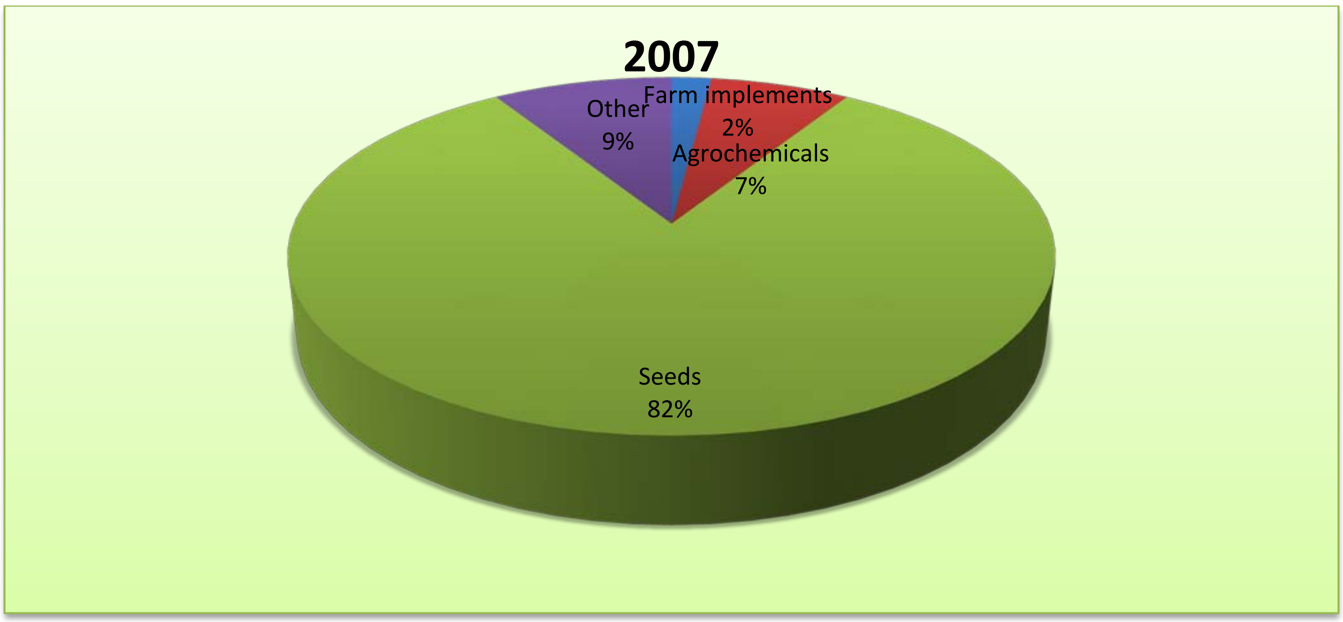

Figure 6 : Sales breakdown by product type (2007)

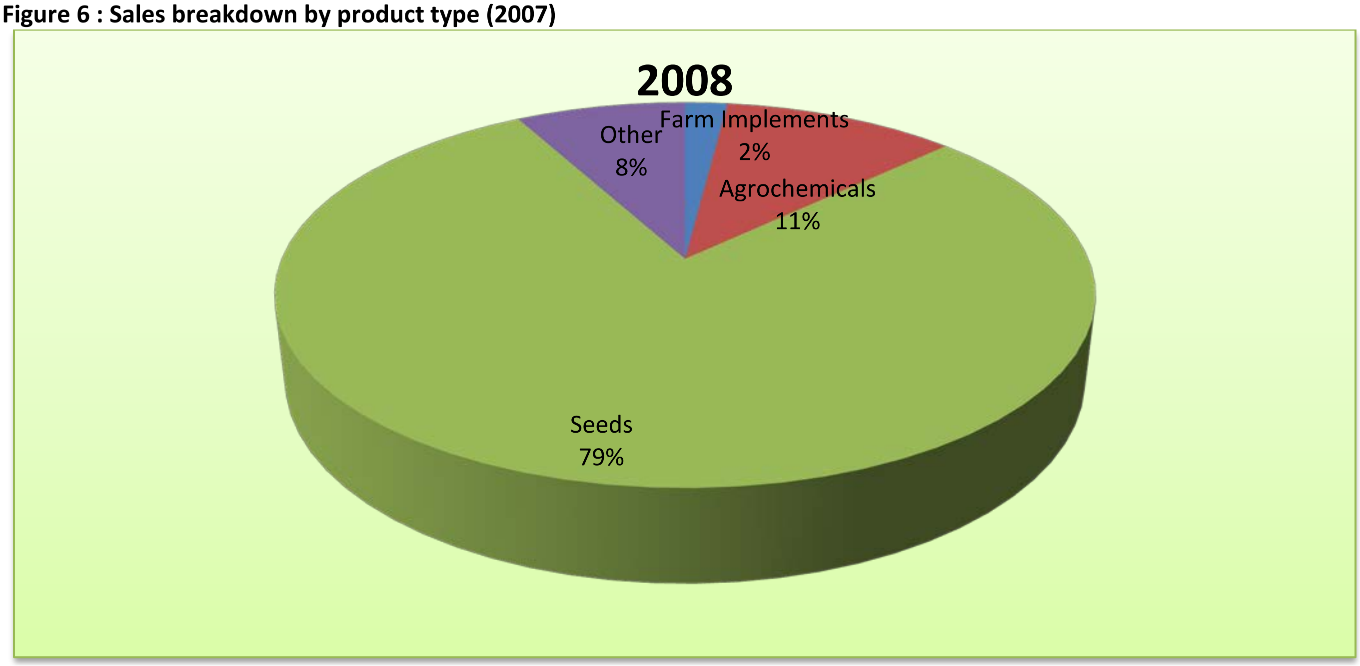

Figure 7: Sales breakdown by product type (2008)

Table 4 gives the data collected and primary and secondary crops sold by Fellows. Fellows were asked to report on their top selling crops by variety, by production, and by sales. In addition, Fellows were asked to identify the best selling and second best selling crops in their bouquet of crops. Based on an average by variety, by production, and by sales, 70% of Fellows identified maize, 15% identified vegetables, and 5% identified beans, sorghum or sunflower as their primary crops. In terms of the secondary crops, 35% of Fellows identified beans, 18% maize, 12% either groundnuts, sorghum or vegetables, and 6% rice or sunflower as their secondary crop.

Table 4 : Percentage of Fellows and primary and secondary crops

Crop	% of Fellows who regard this as a primary crop	% of Fellows who regard this as a secondary crop
Maize	70.00	17.65
Vegetables	15.00	11.76
Beans	5.00	35.29
Sorghum	5.00	11.76
Sunflower	5.00	0
Groundnuts	0	11.76
Rice	0	5.88

With maize being a staple food, one would expect it to be identified as the primary crop for most Fellows and a good starting point for most seed businesses. However, as companies grow, they are likely to diversify their business to include more crops to benefit from the sales of a portfolio of products. Based on the data in Table 4, a good starting point for many businesses would be maize or vegetable seed and thereafter to expand to beans, groundnuts, sorghum, or maize and vegetables if these crops are not primary crops.

3.2.3 Country analysis

Average performance indicators for SODP Fellows by country are summarised in Tables 5 to 7 for 2007. Similar indicators for expected performances in 2008 are given in tables 8 through 10. Based on the average annual sales revenue, it is notable that Mali, Malawi and Mozambique host some of the smaller companies in the program while Zambia, Uganda and Zimbabwe host some of the biggest companies in the program.

Table 5 : Average Performance of the Seeds of Development Program per Country (2007)

Variable		Uganda	Kenya	Tanzania	Malawi	Zambia	Zimbabwe	Mozambique	Mali
Number of employees	Permanent	27.00	16.60	16.00	26.33	38.33	22.33	6.00	2.00
	Casual / seasonal	316.67	92.00	30.67	28.33	102.00	110.00	15.50	3.00
Number of seed growers used		270.00	8.20	9.33	33.67	26.00	11.00	9.00	3.00
Number of seed varieties offered		15.33	11.67	12.00	10.00	36.00	7.67	16.00	9.00
Seed peak processing capacity (tons/day)		37.50	5.00	15.00	4.50	32.00	55.00	6.00	0.5
Total seed production (tons)		1,330.00	360.25	1,028.67	106.00	1,450.00	2,033.33	66.50	60.00
Seed sales (tons)		1,857.50	457.00	934.67	106.00	1,723.50	1,375.00	56.50	60.19
Sales revenue (US $)		2,505,863.00	733,730.00	1,297,333.33	49,333.33	2,409,837.50	800,000.00	650,000.00	20,252.00

Table 6 : Average Sales breakdown by Market Segment per Country (2007)

Sales breakdown by market segment	Uganda	Kenya	Tanzania	Malawi	Zambia	Zimbabwe	Mozambique	Mali
Commercial farmers	14.17 %	11.67 %	15.00 %	n/a	24.67 %	10.00 %	5.00 %	0.00 %
Smallholder farmers	34.58 %	71.67 %	48.00 %	66.67 %	54.33 %	55.00 %	62.50 %	96.50 %
Relief / NGO	38.33 %	16.67 %	18.67 %	n/a	16.67 %	35.00 %	22.50 %	0.20 %
Export	12.92 %	0.00 %	18.33 %	n/a	1.33 %	0.00 %	10.00 %	3.30 %

Table 7 : Average Sales breakdown by Product Type per Country (2007)

Sales breakdown by product type	Uganda	Kenya	Tanzania	Malawi	Zambia	Zimbabwe	Mozambique	Mali
Seeds	85.50%	76.50 %	57.67 %	66.67 %	86.67 %	92.50 %	70.00 %	100.00 %
Agrochemicals	7.50 %	6.25 %	13.33 %	n/a	10.00 %	7.50 %	10.00 %	0.00 %
Farm implements	4.00 %	0.00 %	0.67 %	n/a	1.67 %	0.00 %	8.50 %	0.00 %
Other	3.00 %	17.25 %	28.33 %	n/a	1.67 %	0.00 %	11.50 %	0.00 %

Table 8 : Average Performance of the Seeds of Development Program per Country (2008)

Variable		Uganda	Kenya	Tanzania	Malawi	Zambia	Zimbabwe	Mozambique	Mali
Number of employees	Permanent	32.25	18.40	23.67	29.33	43.33	32.00	8.50	4.00
	Casual / seasonal	277.50	140.00	71.67	38.33	111.67	130.00	22.50	6.00
Number of seed growers used		357.50	10.80	10.00	28.00	27.50	15.50	3.00	20.00
Number of seed varieties offered		37.50	14.00	11.67	5.33	47.00	10.00	19.00	12.00
Seed peak processing capacity (tons/day)		42.50	12.00	15.00	9.00	38.00	60.67	n/a	0.50
Total seed production (tons)		754.00	498.75	1,271.67	153.00	2,225.00	1,200.00	227.50	154.17
Seed sales (tons)		1338.75	568.33	398.33	137.33	1,835.00	1,783.33	232.50	139.63
Sales revenue (US $)		2,537,883.33	1,011,000.00	1,185,416.67	177,000.00	2,574,797.00	1,600,00.00	800,000.00	59,776.80

Table 9 : Average Sales breakdown by Market Segment per Country (2008)

Sales breakdown by market segment	Uganda	Kenya	Tanzania	Malawi	Zambia	Zimbabwe	Mozambique	Mali
Commercial farmers	13.57 %	3.35 %	16.67 %	0.67 %	25.67 %	11.67 %	5.00 %	0.00 %
Smallholder farmers	40.89 %	76.46 %	55.00 %	95.00 %	39.33 %	53.00 %	65.00 %	97.50 %
Relief / NGO	28.39 %	9.00 %	6.67 %	4.33 %	24.00 %	21.00 %	7.50 %	0.80 %
Export	17.14 %	11.19 %	21.67 %	0.00 %	11.00 %	14.33 %	22.50 %	1.70 %

Table 10 : Average Sales breakdown by Product Type per Country (2008)

Sales breakdown by product type	Uganda	Kenya	Tanzania	Malawi	Zambia	Zimbabwe	Mozambique	Mali
Seeds	86.25%	68.00 %	55.00 %	100.00 %	83.33 %	88.33 %	70.00 %	95.00 %
Agrochemicals	7.00 %	17.00 %	16.00 %	0.00 %	12.33 %	8.33 %	10.00 %	4.00 %
Farm implements	4.50 %	2.00 %	0.33 %	0.00 %	1.00 %	1.67 %	5.00 %	1.00 %
Other	2.25 %	13.00 %	28.67 %	0.00 %	3.33 %	1.67 %	8.00 %	0.00 %

3.3 Seeds of Development Program Fellows' views

The following section captures the verbatim responses given by SODP Fellows in response to open-ended questions. Some of the responses have been minimally edited for clarity.

3.3.1. Workshop Training

How has your company benefited from the workshop training opportunities provided by SODP?

Agri Seeds and Services
"MMM08 in Cape Town was an introduction to a range of seeds people from around the continent, running small businesses with various structures, opportunities and environments, which were most useful to compare with our own situation. The exposure to international speakers was educational and inspirational.

The Zambian Trading Workshop was useful to re-connect with Cape Town colleagues. There could have been more trading time, as the programme was very focused on the host country, although the factory visits were interesting seeing such contrasts.

The Seed Quality Control workshop was an invaluable insight to how professional the seed business should be, along with ways to improve our own activities."

Dryland Seeds Ltd
"How to launch a new product was highly beneficial."

Farm Inputs Care Centre (FICA) Ltd
"Both workshop training has exposed company employees to global challenges especially competitiveness that requires high efficiency, quality management, value of networks and partnerships."

Freshco Kenya Ltd
"Improved performance and service delivery in terms of improved seed quality and timely distribution of products to farmers. Understanding the market dynamics and strategising for successfully conducting a seed business."

Funwe Farm Ltd
"Assistant Farm Manager has improved his understanding of quality assurance and is trying to set up systems at the farm. Farm Manager is using the knowledge from MMM and training in management that he recently attended here to try to improve the planning, supervision and management at the farm. His attention to deadlines is improving and is involving other senior staff more in decision making. Operations Director has read all the excellent documents that the staff were given and is able to follow up on issues. Sales Manager who attended the Seed Trading Forum has been exposed to other sales staff from other companies and has a better understanding of branding etc"

Faso Kaba
"Making Markets Matter allowed me to better understand the seed business, including personal management and marketing. I am more confident on my business. The exchanges I had with other colleagues gave me more strength to have adequate equipments. I am also exited to visit more experienced companies and develop a website for my company."

Harvest Farm Seeds
"It has enabled the company to improve sales and market share and given us suggestions on how to deal with and know our competition."

Hygrotech
"Making Markets Matters has provided tools for marketing business decisions, negotiations, and day to day operations of our company. Human Resource management is also an important addition to enable us to engage personnel in decision making at different levels."

Kamano Seeds
"We have identified Companies among fellows who are looking for seed that we have and we want seed that they have. WE have exchanged quotations and given business to each other. On quality, we have learnt never to sell any product that we cannot accept to buy. We are making more improvements to our products."

KARI
"Made contact with several seed growers who are interested in marketing new varieties."

Leldet Ltd
"Seed Quality Control:

- This was an interesting workshop as it was the first time that Leldet Ltd participated. The opportunity to meet other players was of great value. The sharing of experiences and advice given at the workshop and through emails have been valuable. Progeny gave Leldet Ltd advice on varietal release and Sansor on breeder seed bulking.
- Processing line: though we do not have a "plant" the talk given by Cymmit has made us look at the process and make changes to stream line and handle the seed as little as possible. Result more efficiency
- Visit to Pioneer: The images and talk given on male pollinators; removal of male lines have been lessons which we have acted on, and noticed the difference in better pollinated female lines. Result better yields. Also seeing a large seed company use Cimbria equipment we are now in communication and have received a detail plan from Cimbria on a seed processing plant.
- Visit to Pretoria ISTA laboratory was so valuable as Leldet Ltd had been in communication with Dr. Strauss over groundnut testing at the ISTA Lab in Nakuru, and even though she had sent detailed emails, the value of seeing the seed tested was enormous. We hope now that the seed tested will pass!! Result good seed certified
- Visit to Hygrotech: The idea of planting varieties and inviting the supermarkets to come and visit and then the farmers was ingenious! This short rains in Kenya we shall plant and invite the millers and then farmers and give them contacts and prices which the millers will buy the grain. Result - more seed sold and happier farmers as they have market links.

Making Market Matters:

- Left Cape Town so full of energy and enthusiasm and with confidence to tackle the markets.
- Freshco Study, was useful as one could transfer it, to the issues in Leldet Ltd re think problems etc, also value, the home farm having 700Ha of own land to use for seed bulking and not having to totally rely on out growers.
- The Marketing Strategies for Seed Companies and Strategic Thinking for Seed Companies has made us develop a strategy for marketing, each seed crop in a more calculated and organized fashion. This

season we have rolled out small packs of orphan seed which have sold well. Though still small amounts being sold, it has proven for next season this is the way forward. Also we are now looking at our crops in terms of cash cow, dogs, stars and question marks!! Result a more competitive approach to selling Leldet seed and confidence to try new ideas having thought out a strategic plan.

Ministry of Agriculture, Livestock and Environment
"My Institution is a government department (within the Ministry of Agriculture) dealing with research and extension delivery; however we have established a project on sustainable cassava seed multiplication and delivery system as business venture for the farmers involving in the enterprise. The workshop trainings both Seed quality control and Making Markets enriched my knowledge on seed production and delivery issues and is being transferred to the farmers and other stakeholders whom we are collaborating and working together."

Naseco 1996 Ltd
"We have improved on the strategies of marketing our products. We have also recruited a Quality manager to look into quality issues. This season we also launched a new Hybrid. We are currently getting a lot of advice from facilitators we met in those workshops."

National Banana Research Programme (NARO)
"The National Banana Research Programme (NBRP) is currently developing banana virus indexing tools as part of the seed quality control system. Once these tools are in place, the Programme will advise policy makers to incorporate them within the National Seed Regulatory system. Private companies such as the Agro-Genetic Technologies (U) Ltd would use the tools to produce virus-free tissue culture banana plantlets."

Oil Crop Development Ltd
"On seed quality control, it gave us a benchmark to gauge our activities. We saw what is practiced elsewhere a helped us revise our various standards. The workshop helped us appreciate the essence of good business practices."

Pristine Seeds
"Our staff has always come out of these workshops wiser and more motivated and very well informed."

Progene Seeds
"Progene Seeds is very weak in marketing and marketing strategies and the direct contact with personnel to assist in the devising of a marketing program to sell seed is extremely beneficial. The seed quality program was a bit too sketchy and may have had more effect if it was more in depth, although it was still very good and beneficial to all in the program."

Qualita
"As a graduate in marketing I did realize how many of the basic marketing principals does one forget. It's always very interesting and knowledgeable to see in practice how the other companies are applying these principals. I learned the most from the case studies of companies operating in "Africa" and realized again how different it is to operate in Africa looking at other countries."

Seed Tech
"The MMM management training workshops offered an opportunity to learn areas of some study in depth like of Marketing Strategy, Strategic Planning, Target Marketing, Business Plan Format, and the Due

Diligence checklist (Business) and the case studies not to mention about the FAO information on Seed Marketing and that had directly impacted the performance in serving the local farmers in one way or the other.

The Seed Quality Control workshop especially the one held in SA Pretoria the topics covered were very beneficial in the sense that like the Seed Conditioning and Seed Quality taught us how a crucial seed product should be handled both in the field and factory via lab to maintained quality and product presentation.

Semente Perfeita
"The company representative who attended the Seed Quality Control Workshop came back enlightened en knowledgeable. He is now always leading in cautioning the team on seed quality issues. The guy was changed and motivated."

Suba Agro Trading
"Yes; when we started to enrol in SODP, we were a small company working as seed merchant; through market matter and Seed quality Control workshops, we have gained confidence, known the way to go to become a fully fledged seed company- we have learnt a lot from Company's presentations. We have also gained a lot through field visits and workshop resource personnel's."

Tanseed International
"Now able to target market correctly, set good market strategy and strategic planning and manages finance properly than before. Seed sales have been improving year after another."

Victoria Seeds
"Yes. Reason, there's been substantial increased sale turn over as a result of good quality seed and market penetration."

Western Seeds
"Lecture by Ms Funk in the Market Matters Workshop."

Zanobia Seeds
"Reflecting on our better performance"

ZUM Seeds
"These workshops have helped answer the questions: when, where, how and level to produce. This knowledge has assisted my earlier training in agricultural economics (at least. Degree), my training at ICI where I served as a sales and marketing representative (1985 to 1992). This training also enforced those basic principles in accounting and finance obtained at the University of Malawi College of Accountancy. As a retired Maize resistance breeder, I further benefited from the Seed Quality Control workshop in Pretoria in matters of quality assurance. The two workshops were most relevant indeed and invaluable, tailor made for SODP aspiring senior managers. My first and second degree helped me to appreciate and gain from these workshops as they were all agricultural and addressing issues of food security in SADC."

3.3.2. Networking opportunities

How has your company benefited from the networking opportunities provided by SODP?

Agri Seeds and Services
"Whilst no actual trade has been achieved as a direct result of any of the events, regular contact and sharing of ideas continues amongst a number of people whom we met through SODP."

Dryland Seeds Ltd
"We are able to trade with Leldet (US $1500) and Oil Crops Development (US $5800) through cash or barter trade of certified seed."

Farm Inputs Care Centre (FICA) Limited
"We are developing the already existing networks e.g. Macadamia project with Freshco, developing production of Uganda maize materials in Arusha region Tanzania with a sister company FICA 2002 Ltd where we provide breeder and basic seed and expertise.

ZUM in Malawi sent some of its breeder seed to be multiplied for seed increase taking advantage of two growing seasons and reliable rain in Uganda.

Still talking with Kamano seed company in Zambia on ways of exchanging materials especially sorghum."

Freshco Kenya Ltd
"The networking has led to understanding of the regional seed market and sharing knowledge in regards to product promotions and quality control & assurance. Testing of varieties in other countries within the East African Community region is also a means of sharing diverse genetics amongst farmers which will lead to a wide market reach of the products offered by SODP companies(Freshco/Progene, Freshco/Fica)."

Funwe Farm Ltd
"The managers and directors have appreciated meeting other senior staff from other seed companies and discussing similarities and differences and especially the opportunity to look at challenges faced. Funwe Farm has just been awarded a travel grant and will be making arrangements to visit other companies in Uganda. We have not made any deals as such as we are still small and are currently hoping to sell all this years products within our area. We are expanding our hectarage and producing other seed crops, mainly legumes."

Faso Kaba
"Through the networking opportunities provided by SODP, I was able to make positive contact with MRI seeds, Kamano seed, and Monsanto. I will have a long term partnership with these companies. Also after the workshop, I was able to make local partnership with the national Institute of research (IER) in Mali for production of Foundation of major food crop seeds (Maize, Sorghum, Cowpea, Groundnut, etc). I have also made a good partnership with ICRISAT and AVRDC for hybrid sorghum and vegetable seeds. I brought some seeds samples from MRI and Kamano for testing in Mali."

Harvest Farm Seeds
"Company has developed working/business partners with Chinese companies (i.e. Beijing Honor Seed Co Ltd and China Seed Corp Ltd) on production, processing, packaging and marketing of vegetable seeds."

Hygrotech
"Though not in physical business deals, the networking has helped in understanding how other similar businesses are run in the region and has provided a platform to think out of the box."

Kamano Seeds
"We are working towards giving some companies in East Africa produce and supply beans because of the favourable weather condition."

KARI
"Western seed company and LELDET seed company are interested in production and marketing bean seed of new varieties."

Leldet Ltd
"No deals as such have been made due to Leldet using all seed which it has produced and limited cash to buy!!! However, contacts made at the Seed Quality workshop with Sansor and ISTA have helped us in dealing with seed certification and testing. The Sansor contacts were invaluable in helping to work out issues and talk with KEPHIS concerning releasing various crops which they had no experience with. We assisted Progeny and MRI in getting import licence for Maize seed. We have sold seed to Dry Lands Seed Co. Next year we will take advantage of the seed market. Also the face to face contacts will assist us in seed harmonization when it takes place."

Ministry of Agriculture, Livestock and Environment
"Since our organization is a non profit government research institution, there is so far no such deals, however, networking helped me in exchange of information on various issue of seed production and marketing in other parts of the region"

Naseco 1996 Ltd
"Naseco is now dealing with Western Seeds to produce process and market their Hybrid Maize (WH 403) in Uganda while paying them loyalties on every kilo sold. We have put up demo plots of WH 403 in different parts of Uganda."

National Banana Research Programme (NARO)
"The NBRP is working out a collaborative activity with Progene Seeds based in Zimbabwe, to evaluate banana germplasm within East, Central and Southern Africa. A collaboration whereby the NBRP will share experiences with Zanobia Seeds based in Dodoma, Tanzania, is being worked out. The NBRP is also working out an arrangement whereby it will evaluate a banana growth enhancing substance developed by Hinrich Flamm based in Florida, USA."

Oil Crop Development Ltd
"We have been able to network and utilize our processing facilities by processing seeds for other fellows."

Pristine Seeds
"We are networked with FICA of Uganda and doing work in Malawi and Mozambique."

Qualita
"Qualita opened a branch in South Africa. After our visit to Hygrotech during MMM8 we realized that we had the capacity to enter the South African market. Qualita Mozambique always has logistic problems like

transport and ISTA Orange certificates that restricted sales and exports, exporting through SA now make things much easier.

We have an agreement to supply seed now to MRI seeds in Zambia, Seedtech in Malawi and Nimbe seeds in Zimbabwe, We are also busy with agreements with FASO KABA in Mali to be Qualita distributors.

Qualita will supply Bulk seed to Progene in Zimbabwe and also design and supply them with their own brand of packaging to avoid competition for Progene with Nimbe seeds."

Seed Tech
"SODP networking has benefited Seed – Tech Co for it to get connected and interact with other small/medium Seed Companies in the East and Central Africa and Seed-Tech is now collaborating with partners like Kamano Seed Co of Zambia who inquired Rice seed to the tune of 35 metric tones and 65 metric tones of Groundnut seed valued at a total of 50,000 US$, and had an inquiry from Pristine Seed Co of groundnut seed close to 30 metric ton valued at 30,000US$ and Seed Tech intends to order vegetable seed from Qualita Seed Ltda and Hygrotech valued at 2 thousand US$. Progene Seed Co would like to expand its business in Malawi through Seed –Tech"

Semente Perfeita
"Semente Perfeita is negotiating a deal worth US$ 45000 of Sunflower seed to be exported to Zimbabwe – AgriSeed. Semente Perfeita is also planning to adopt MRI Hybrids and register them in Mozambique."

Suba Agro Trading
"Networking between company fellows: We have been able to establish business relationships with the following fellows: Victoria Seeds (Purchase of Sorghum and Sale of Vegetable Seed); FICA Seed (Purchase of Sorghum Seeds); Western Seed (Sorghum & Maize Seed). We are in negotiation with other fellows in Zambia and Mozambique to produce and sell them vegetable seeds.

Networking between us and International germplasm organization like ICRISAT and CIMMITY, through SODP we have been able to establish a relationship with CIMMITY and ICRISAT and they are now providing us their germplasm for our own seed variety development; we have finished the 1st year multi-location trials/screening with about 300 entries of maize and wheat

Networking with other seed companies not in SODP: Through SODP we have established a business relationship with companies like : Agricol Pty (where we are importing sunflower Seed worth $20,000/= a year-business growing; Bejol Sheetal= we Import vegetable seed worth $15,000/= annually-business growing."

Tanseed International
"Agreement to produce and export Tanseed seed varieties by Naseco Seed Company of Uganda"

Victoria Seeds
"There has been increased production, and additional employment as a result of company's growth. The company has established new seed processing plant to cater for emerging markets in southern Sudan, resettlement packages for the returners in Northern Uganda"

Western Seeds
"Contact with other seed companies in the SSA, e.g. MRI much to learn from their operations. Possible future collaboration."

Zanobia Seeds
"We are working on it."

ZUM Seeds
"Through field trips to other seed companies in East Africa I have been able to get first hand information of how these SMEs operate and what makes them tick. I have established collaborative partners with most of them, but being a start-up company Zum Seeds has not fully capitalized on such partnerships. A detailed report of the value and nature of such partnerships was submitted to the coordinator of SODP, upon my return. Companies visited were: Freshco, Faida, Western Seeds (in Kenya), Victoria, Naseco, Fica, Harvest Seeds (in Uganda)."

3.3.3. Proposals for additional activities

What activities, not currently organized by SODP, would you like to see added to the program?

Agri Seeds and Services
"With the slow, but evolving move towards harmonization in the seed business, and the SADC &COMESA barriers being reduced, there is opportunity to have greater exposure and visibility given to the mechanics of easier seed trading."

Dryland Seeds Ltd
"Benchmarking of SODP fellows."

Farm Inputs Care Centre (FICA) Limited

- "A program on corporate governance to guide companies to have a clear separation of roles of Board, if it exists, and management.
- Seed technology to assist seed companies train their production and marketing staff.
- Improvement of Management systems.
- Sourcing offshore financing for investment."

Freshco Kenya Ltd
"Joint training of farmers in specific countries through the media for market led production programmes to be sponsored by SODP but to cover all products offered by SODP fellows in that country."

Funwe Farm Ltd
"We would find the following helpful to have information:

- About basic seed company expansion and scaling up issues, such as financial management systems, software, stores and dispatch,
- On breeding new suitable varieties,
- On systems of working with outgrowers and contractors, and
- On preventing infestation of the crops."

Faso Kaba

- "Lobbing of politicians and stakeholders
- How to write a positive proposal to attract sponsors and financial institutes
- How to better negotiate
- Making attractive commercials on radio and TV"

Harvest Farm Seeds
"Would like SODP to develop venture capital to be availed to fellows."

Hygrotech
"Assist in accessing finances for small seed businesses"

Kamano Seeds
"It could be interesting to add a program on business accounting."

Leldet Ltd
"Assist in equipment, more managerial courses e.g. Time management, stock control, and accounts."

Ministry of Agriculture, Livestock and Environment
"To hold seed business training especially on vegetative propagated crops."

Naseco 1996 Ltd
"To check on implementation by visiting different member companies."

National Banana Research Programme (NARO)
"Intensify capacity building in seed quality assurance systems for countries whose seed systems are not yet well developed, e.g. Uganda."

Oil Crop Development Ltd
"Pristine Seeds-Mentorship by retired company executive who come and work and put systems in companies for periods one month to three."

Qualita
"Because SODP Fellows are operating in different environments and have different problems I would like SODP to look into Companies separately, like Qualita has the urgent need for a Financial and bookkeeping system where for other companies it's a very strong part of their business."

Seed Tech
"SODP after training the small/medium entrepreneurs in some aspects of management and seed quality improvements all these years to better serve the smallholder farmers should be able to link the entrepreneurs with the regional/international financial institutions for funding in areas of requiring financial assistance. A good example is when Seed Tech attended the Rockefeller Foundation General Conference in Maputo, March, 2007 after presenting its company profile was identified for AGRA funding and eventually put in a special training program for Seed Business Management which are the fruits of SODP efforts and that in turn will greatly enhance the seed delivery system."

Semente Perfeita
"Including financing institutions to work with seed companies."

Suba Agro Trading

- "Training on Seed Industry organization structure.
- Capital fund acquisitions. Most of the fellow companies lack good machinery for seed processing and packing.
- Breeding capacity. Breeding is very expensive and for small companies its difficult to hire qualified staff."

Victoria Seeds
"Development of Quality management manual for all SODP fellows."

Western Seeds
"Mentoring. Preparation and Training in Business Plans."

Zanobia Seeds
"We have improved our production and are ready to get cleaning plant and irrigation system for production."

ZUM Seeds
"For the moment the current activities are adequate. What needs to be done is for us to fully utilize them. Issues of financing needs to be looked at seriously as this remains the one single obstacle to most aspiring and emerging SME's. I am aware this is not a prerogative of SODP. Help often comes too little too late."

3.3.4. Major changes in company

What major changes has your company undergone over the past year?

Agri Seeds and Services
"Plant upgrade. A new grading, treating and bagging pant have been installed. Diversification beyond seeds, has been necessary, in order to survive a hostile business environment. (ravaging inflation, price controls, lack of adequate seed production)"

Dryland Seeds Ltd
"Currently developing new maize varieties that will be launched next year. Increase in human and working capital."

Farm Inputs Care Centre (FICA) Limited
"Seed cotton production as a new product and Seed maize UH 6303 for high altitude above 1550m asl to 2000m asl"

Freshco Kenya Ltd
"Introduction of new varieties and crops such as quality protein maize and beans. In house training of staffs on various seed quality aspects that leads to improved performance and marketing of our products."

Funwe Farm Ltd
"We are clearly much more focused on being a significant seed company, with vertical integration and a network of agrodealers selling the products. We have a grant now from AGRA to assist with marketing and hybrid maize breeding and are progressing quite well with that. We are just about to lease more land for expansion and are considering what to do about expanding our processing facilities.

Unfortunately the rains affected our yield badly this year with starting early so as to encourage weed growth before planting began, too much in mid growth, which washed off the fertilizer, and ending abruptly early which reduced cob and seed size. The yield is much lower than expected; we are not sure yet of the financial implications of this."

Faso Kaba

- "Obtaining a grant from a sponsor
- Opening 40 operational sell points across the country
- Conducting demonstration plots
- Buying through well established production contracts
- Company manager and a seed specialist participated to SODP workshops in South Africa and Zambia"

Harvest Farm Seeds

"Through partnership with world vegetable centre, we have developed capacity for production and distribution of African indigenous vegetable."

Hygrotech

"None"

Kamano Seeds

"The major change in our company is the installation of the seed processing machinery which is in place and working now."

Leldet Ltd

"First demonstrations through Central, Western, Eastern and Rift Valley proving there is a market for orphan crops and launching Leldet into the seed market."

Ministry of Agriculture, Livestock and Environment

"In the past, vegetative propagated crops seeds was not taken as a business, and farmers were just used to share the seeds/planting materials among themselves, that was not sustainable venture, however, over the recent years seeds for these type of crops are also traded like any other seeds, although with limited magnitude."

Naseco 1996 Ltd

"We have changed the organisation structure, looking critically on the different jobs. We also formed different committees; management, Human resource, Financial to mention a few. We are doing serious costing on the unit product we produce."

Pristine Seeds

"Our group taking shape and getting itself ready for listing in three to five years on the Zimbabwe stork exchange."

Qualita

"Qualita stopped producing maize seed. Qualita focus now on Vegetable seeds sales, the production of vegetable seeds and the production of beans like Cowpeas, Sugar beans and Sorghum."

Seed Tech

"Seed Tech has increased its capacity and product portfolio from mere 10mt to 200tm and handling several newly released adaptive seeds."

Semente Perfeita

- "Increase the labour force (from 2 permanent workers to 8 permanent workers)
- Yearly production form a total tonnage of 100MT to 150MT
- From Mize seed only to maize, sorghum, sunflower and vegetable seeds"

Suba Agro Trading

- "Centralization of seed processing and storage : We have built a 6000 sq meters warehouse for seed worth $1.5million for 2006/07 season
- Over dependence on external contract growers: We have purchased a 750 Ha for US$ 650,000/=; in 2007 and for 2007/08 we have managed to use this farm to produce about 50% of our seed production. The farm is also used for breeding/ plant research. We hope to finish installing irrigation system (sprinkler and drip) for 300ha by March 2009and therefore achieve 90% independence on seed production
- We have also established a breeding department for maize, cereals and vegetables
- We have ordered modern equipments for seed processing
- We have started seed export to Rwanda and other neighbouring countries"

Tanseed International

"Developed out grower strategy and seed quality protocol"

Victoria Seeds

"Victoria Seeds has developed proper strategic plan and initiated of new research facility at Kawanda."

Western Seeds

"Processing expansion."

Zanobia Seeds

"Prices are same but cost of production is going up and small farmers find it difficult to buy seeds due to high price fuel /fertilizers and inputs."

ZUM Seeds

"We missed the first round of AGRA funding and thus this greatly slowed us up. Despite limited resources we still managed to produce 30 MT of ZM 621 seed which hopefully will be sold through the Malawi Govt. Seed Subsidy program. We also managed to produce IR-Maize seed (Basic Seed), with assistance from AATF. This seed with go into doing more NPT trials, efficacy trials and demonstration of the technology. The remaining seed will go into more seed multiplication. We have identified a warehouse, new office and production farm. We also have a no-exclusive right to produce one of the elite hybrid varieties from the National Program (MH 26, formerly CZR 8)."

3.3.5. Seed price dynamics

We are interested in understanding how the price dynamics for seed have changed in your country since your entry into the seed market. Please explain in detail with some practical examples.

Agri Seeds and Services

"From a free market situation, where prices were market related up to 1999, government price controls have had a very negative impact on the seed industry in Zimbabwe, to the extent of seeking contracts business that has prejudiced the everyday consumer who is not able to readily source seeds in the open market."

Dryland Seeds Ltd

"Prices have remained the same despite increasing production costs due to increased competition."

Farm Inputs Care Centre (FICA) Limited

"There has been a major shift of prices from 2001-2007, except that this year the world wide demand for cereals, high cost of inputs and climate change has doubled the price at which we sell seed currently. E.g. Open pollinated maize seed from 0.5 US dollars per kg to 0.75 US dollars this year and hybrid seed maize from 0.95 US dollars per kg to 1.3 US Dollars. These are wholesale prices. The retail price range between 25-30% higher."

Freshco Kenya Ltd

"While there before there was only Kenya Seed Company selling at =$1.8 per kg since Freshco entry it has been able to match those prices, and also improve by selling OPVs at a lower price than Kenya Seed."

Funwe Farm Ltd

"Over the last year we have seen the following price increases:

- Diesel/ litre from K139 → K234; an increase of 68%
- Processing chemicals/litre from K3,500 → K4,700 and increase of 34%
- Basic seed/kg from K118 → K125 and increase of 6%
- Fertilizer/ha from K48,720 → K61,415 and increase of 26%
- Post harvest chemicals K2,850 → K3,450 and increase of 21%
- Processing materials K1,600 → K2,010 an increase of 25%"

Faso Kaba

"The price for improved quality seeds has positively increased within the range of affordability by producers."

Harvest Farm Seeds

"Harvest Farm Seeds Ltd. was the first seeds company to enter into private marketing of seeds in Uganda and now there are over ten competitors. Despite the competition, the price of seeds has continued to rise due to inbuilt costs and general acceptance of improved seed."

Hygrotech

"Does not apply to the vegetable industry in Zambia"

Kamano Seeds

"Seed prices have been going up due to the escalating of oil prices on the international market. This trend has not been good. It has affected our sales because seed prices also have not been stable."

Leldet Ltd
"Dressed seed in Central was being used for food as the price 75/= per KG was less than the grain price. The market is extremely difficult to grasp as it is so fluid. Input costs have increased more than 100% causing anxiety for next years growing season. Also out growers needing a better price to cover costs etc"

Naseco 1996 Ltd
"With serious costing of our products, we found out the need to increase our prices on all the products. Maize for instance - OPV moved from 900= Ugx to 1,300= Ugx, Hybrid from 1,800= to 2,800="

National Banana Research Programme (NARO)
"Not applicable to banana in Uganda. The banana seed market is not yet developed. Farmers still rely a lot on picking suckers from existing banana plantations."

Oil Crop Development Ltd
"Seed prices in Kenya have not changed in the last ten years. This is because the seed industry is dominated by Kenya Seed Company which controls about 80% of the seed industry. They are controlled by the government and it has been a policy not to increase seed prices."

Pristine Seeds
"Prices are controlled in Zimbabwe so no price dynamics to talk about."

Qualita
"To answer this question I will first have to explain the Mozambique seed market. Mozambique farmers do not buy seed due to NGO's and the government that encourage farmers to retain seed. The total market of OPV maize in Mozambique (sold by private companies) is 600 Tons of OPV's and 200 Tons Hybrid maize seed. Government research station is handing out basic seed and pre basic seed to private people and farmers. (I am waiting and begging IIAM now for three years for basic IT18 seed with out any luck, a South African farmer drove to Maputo "IIAM" and they gave him 300 kg IT 18 BASIC SEED.

Government is doing Seed fairs where you can go and sell your seed at. 95% of all the seed are sold through this system, the problem with that is that companies are selling tickets and not seed, the profit is then shared between the company and the government official. If you sell your seed on the fair do you wait up to four months for your money.

When we entered the seed market the price for OPV maize was $750 USD and hybrids $1000 USD. Seed co pulled out of Mozambique and SEMOC is taken over by Government.

Government now subsidizes Semoc, due to that private seed companies can't compete on the Maize seed market with the public varieties. Government presented last week there new plan for the green revolution, Government "SEMOC" will sell maize seed to agents at $360 USD and the agents will sell the seed for not more than $600 USD per ton. The farmer will then get a loan from government to buy the seed. This will make it impossible to compete in the market with public varieties."

Seed Tech
"The price of seed have been steadily increasing with the price of fertilizer and currently the price of fertilizer has doubled with the global food crisis and what that means is that the price of seed will increase more than double the current price affecting the purchasing power of ordinary farmers and the real impact will be on price of fertilizer and not of seed."

Semente Perfeita
"Seed prices have generally gone up and may be due to general increase of food and other goods prices. For example the price of grain this year is last year's seed price, which means higher seed prices."

Suba Agro Trading
"The seed prices have been changing at a rate of 5% per annual. Practically there are no big changes."

Victoria Seeds
"Due to escalating food prices worldwide, there have been unstable prices for seeds."

Western Seeds
"Prices have stabilized. The Multinationals and market leader no longer set arbitrary prices."

ZUM Seeds
"Practically no change when you factor in inflation. For example in 2007 1 kg. of seed was USD. 0.71 and in 2008 the proposed price is USD. 1.25 /Kg. against inflation rate of 8% in 2007 and now much higher (increased fuel and food prices globally)."

4. CONCLUSION

The outcomes and successes of the Seeds of Development Program are most visible in the program's direct impact on the performance of companies participating in the SODP program. This annual monitoring and evaluation assessment illustrates that overall, the SODP has experienced significant growth in a number of performance areas. These include the number of permanent and seasonal employees, the number of seed growers used, the number of varieties offered, seed processing capacity, and sales revenue.

A key strength of the Seeds of Development Program is the range of activities the program offers to Fellows, which aim to build Fellows' capacity to manage their businesses and to create an environment conducive to meaningful interaction and networking with companies and other institutions relevant to the seed industry. In addition, SODP provides access to research that can either inform private company strategies or influence public policies. Based on the evaluation results in this report, Fellows value most highly the capacity building and networking activities provided by the Program: capacity building activities enable them to continually improve the management of their businesses, while networking activities allow Fellows to expand their contacts, pursue business deals they would not otherwise have access to, gain exposure to seed industries in a variety of countries, network with seed industry specialists, and increase their ability to provide seed products/services in domestic and/or regional markets.

In addition to the specific results reported by the Fellows, this report also points to the broader impact of the program in smallholder farming communities. As shown in the report, SODP companies create permanent and seasonal employment in the communities where they operate. In the 2007-2008 period almost all companies expect an increase in permanent and seasonal labour, and the earnings of these employees support immediate and extended families. Company sales data also shows that the bulk of sales (more than 80%) go to smallholder farmers. By offering a wider variety of seeds, including higher-yielding, disease and drought-resistant varieties, and other inputs such as fertilizers, SODP companies help smallholder farmers increase food security in their families and communities. Building on its success so far, SODP's goal is to continue to grow its network of African seed companies that will lay the foundation for a well-functioning, locally-owned, market driven, and continent-wide seed marketing system.

APPENDIX 1: SODP Monitoring and Evaluation Form 2007/2008

Company Name:		*Year Established:*	
Address:			
Phone number:		*Fax number:*	
Email:		*Website:*	

Please indicate if the following SODP activities have been beneficial to your company (only respond to activities that your company has participated in). You can indicate your choice by **bolding and underlining** the appropriate number.

SODP Activity	Not applicable	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
A. Seed Quality Control workshop in Pretoria	n/a	1	2	3	4	5
B. Making Markets Matter Workshop	n/a	1	2	3	4	5
C. Seed Trading Forum in Zambia	n/a	1	2	3	4	5
D. Student attachments	n/a	1	2	3	4	5
E. Field trips to visit other seed companies	n/a	1	2	3	4	5
F. Internet presence & exposure through SODP	n/a	1	2	3	4	5
G. Research by Cornell University	n/a	1	2	3	4	5

1. In the space below, please rank the SODP activities above (A through G) in an order that reflects the activity's value to your company. Please list the most valuable activity first (1) and the least valuable last (7).

SODP Activity	**Rank**
A. Seed Quality Control workshop in Pretoria	
B. Making Markets Matter Workshop	
C. Seed Trading Forum in Zambia	
D. Student attachments	
E. Field trips to visit other seed companies	
F. Internet presence & exposure through SODP	
G. Research by Cornell University	

2. How has your company benefited from the workshop training (i.e., Making Markets Matter and Seed Quality Control) provided by SODP? Please be specific with examples based on your own experiences.

3. How has your company benefited from the networking opportunities provided through SODP? Please specify collaborative partners, nature and value of any deals made over the last 13 months (add separate sheet if necessary).

4. What activities, not currently organized by SODP, would you like to see have added to the program? (Add details on a separate sheet if necessary)

5. What major changes has you company undergone over the past year? If any, please provide specific details.

6. We are interested in understanding how the price dynamics for seed have changed in your country since your entry into the seed market. Please explain in detail with some practical examples.

COMPANY SIZE AND PERFORMANCE INDICATORS

Company Name: ____

		2007	2008 Projected
Number of employees	Permanent		
	Casual / seasonal		
Number of seed growers used			
Number of seed varieties offered (Please specify the crops)	______________________ Top selling crop (Please specify)		
	______________________ Second selling crop (Please specify)		
	______________________ Total number of seed varieties		
Seed peak processing capacity (tonnes per day)			
Total seed production (tons) (Please specify by the crops)	______________________ Top selling crop(Please specify)		
	______________________ Second selling crop (Please specify)		
	______________________ Total seed production		
Seed sales (tons) (Please specify by the crops)	______________________ Top selling seed (Please specify)		
	______________________ Second selling seed (Please specify)		
	______________________ Total seed sales		
Domestic market share (% of all marketed seed)			
Sales revenue (US $)			
Sales breakdown by Market Segment (% of total sales revenue)	% commercial farmers		
	% smallholder farmers		
	% relief / NGO		
	% export		
Sales breakdown by Product Type (% of total sales revenue)	% Seeds		
	% Agrochemicals		
	% Farm Implements		
	% Other		