

# SEEDS OF DEVELOPMENT PROGRAM

## YEAR 2



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## SEEDS OF DEVELOPMENT PROGRAM

### Project Summary

#### **Problem Context**

About 70 percent of Sub-Sahara 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, climactic 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 networking opportunities. The Seeds of Development 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 the second year, marketing manager from each Fellow company participated in the week long executive management training workshop.

*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 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 2004, the Making Markets Matter workshop was attended by 35 participants from 10 African 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 a separate detailed report on the workshop).

*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.

*Student Attachments:* In January 2005, Dr. Edward Mabaya led a group of four Cornell University students with wide ranging business management background on a study trip to Uganda. During the ten-day visit, the students met with representatives of two seed companies, FICA Seeds and Victoria Seeds and assisted reviewing and critiquing the companies' strategic business plans, developing comprehensive marketing plans, and creating company websites and promotional brochures.

*Websites:* SODP has developed and continues to update a website and a list-serve designed to provide 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)). Through student attachments, the program has assisted Fellow companies in developing an internet presence.

*Research:* Three Masters Theses research projects have been completed in Cornell University's Emerging Markets Program examining the market structure and participant conduct of the seed industry in Sub-Saharan Africa. Case studies have documented for two of the fellow companies – Victoria Seeds Ltd. and FICA Seeds Ltd.

### **Program Expansion**

Market Matters Inc. has been successful in using the founding grant from the Rockefeller Foundation to leverage additional resources from the US Agency for International Development (USAID). The additional resources are being used to expand SODP in both scale and scope. In terms of scale, the additional resources have been used to expand the program by adding five additional Fellows to cover all strategic countries in East and Southern Africa. In terms of scope, the additional resources will be used to expand the activities of SODP thereby making it more beneficial for all fellows. The first of these activities is an annual Seed Trading Forum.

## **SEEDS OF DEVELOPMENT PROGRAM – Year 2 Report**

### **INTRODUCTION**

This report highlights the progress of the Seeds of Development Program (SODP) in its second year beginning June 1, 2004. During this second year, key activities have been carried out as per work plan and some impact is already evident. The fellows program is fully operational, working with ten seed companies in five East and Southern African countries (Kenya, Tanzania, Uganda, Zambia, and Zimbabwe). 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 and continue to be updated to meet the demands of Africa's dynamic seed industry. This report starts by recapping the program's scope and purpose. A description of the current Fellows is then presented. Against this background, the key accomplishments to date are summarized. Two detailed reports for specific events – the Making Markets Matter workshop and the Seed Trading Forum – accompany this report.

### **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.

### **SODP FELLOWS**

The current Fellows of SODP are listed in Table 1. Detailed profiles of the Fellow companies are given in Appendix A. Of the fifteen Fellows, ten were selected in the first year of SODP as pioneering members of the program with exclusive support from the Rockefeller Foundations. These Fellows are referred to as "Group A" in this report.

In the second year of SODP, Market Matters Inc. has been successful in using the founding grant from the Rockefeller Foundation to leverage additional resources from the US Agency for International Development (USAID). The additional resources have been used to expand SODP in both scale and scope. In terms of scale, the additional resources will expand the program by adding five additional Fellows to cover all strategic countries in East and Southern Africa. The additional Fellows are referred to in this report as “Group B”. In terms of scope, the additional resources will be used to expand the activities of SODP thereby making it more beneficial for all fellows. The first of these activities is an annual Seed Trading Forum. This networking forum brings together managers from all Fellow companies in one location sometime in June (after harvesting and before the next planting season) to explore opportunities for trading seed and other collaborations. Representatives from plant breeding and regulatory institutes are also invited to this forum to highlight the latest varieties share information on domestic seed policies and regulations. A separate detailed report for the 2005 Seed Trading Forum accompanies this report.

**Table 1. Current SODP Fellows**

<b>Group</b>	<b>Company</b>	<b>Managing Director</b>	<b>Country</b>
A	1. FICA Seeds	Mr Chris Kajjuka	Uganda
A	2. Victoria Seeds	Ms Josephine Okot	Uganda
B	3. Harvest Farm Seeds	Dr. Mukiri wa Githendu	Uganda
A	4. Freshco Seeds Ltd.	Mr James K. Gichanga	Kenya
A	5. Western Seeds	Mr Saleem Esmail	Kenya
A	6. Lagrotech Seed Company	Dr. Moses Onim	Kenya
A	7. Zenobia Seeds	Mr Rajinder Mand	Tanzania
B	8. Tanseed International	Mr Isaka Mashauri	Tanzania
A	9. Subra Agro Trading	Mr Mahenye Muia	Tanzania
A	10. Prestine Seeds	Mr John Makoni	Zimbabwe
A	11. National Tested Seeds	Mr Lance Kennedy	Zimbabwe
B	12. Nhimbe Seeds	Mr Vincent Gwarazimba	Zimbabwe
A	13. MRI Seeds	Mr Vladmire Ristanovic	Zambia
B	14. Kanamo Seeds	Mr Dis Horemans	Zambia
B	15. Qualita Seeds	Mr Brenda Van Dyk	Mozambique

### **WORKSHOP TRAINING**

On September 5-10, 2004, Stellenbosch University, in collaboration with Cornell University and Market Matters, Inc., hosted “Making Markets Matter '04,” an African Emerging Markets Workshop for the Agribusiness Sector. The aim of the workshop was to increase capacity among African agribusinesses to meet the ever-increasing demands of today’s global agro-food system. The event attracted a diverse group of participants and facilitators from Africa and the USA, offering a variety of backgrounds and experiences.

A total of 35 participants from ten African countries attended the workshop, that was facilitated by an international group of ten experts in the areas of supply-chains, marketing, and finance, among others. On the whole, the workshop was a resounding success; participants expressed interest in follow-up workshops in their home countries that would focus on issues specific to their respective operating environments. The facilitators were thought to be knowledgeable and approachable, and the topics highly applicable to the needs of the businesses represented. In particular, participants valued the case study approach as an important tool for information dissemination as it allowed them to share their experiences and learn from those of other businesses.

The workshop also featured five guest speakers, who talked about issues relevant to the themes of the workshop. The speakers included Venete Klein (General Manager, Agribusiness, ABSA), Professor Chris Brink (Rector, Stellenbosch University), Dr. Akin Adesina (Associate Director, Food Security; Rockefeller Foundation), Mumeka Wright (General manager, Bimzi Ltd., Zambia) and Dr. Moses Onim (Managing Director, Lagrotech Seed Company; Kenya).

The program targeted micro-, small-, and medium-sized agribusiness firms engaged in farm and off-farm services, and in the production and processing of natural products and food and agriculture products. Participants were selected to represent diverse backgrounds and experiences, including entrepreneurs and business development facilitators, as well as personnel of nongovernmental organizations, business and commodity associations, government departments, and donor agencies involved in the delivery of management, marketing, and business training services. A separate detailed report for the 2004 Making Markets Matter workshop accompanies this report.

#### **Making Markets Matter - Benefits to the Participants**

- Stimulating product development, marketing, and finance seminars presented by world class facilitators.
- A participatory approach involving actual market development case studies.
- Access to and interactions with representatives from business development services institutions and emerging businesses in Sub-Saharan Africa.
- A chance to improve strategic marketing skills.
- A set of contemporary marketing and finance training materials.

#### **CONSULTATION WITH SODP FELLOWS**

During the month of November, Seeds of Development Program (SODP) coordinator Dr. Ed Mabaya visited East and Southern Africa to meet with SODP Fellows and stake holders. During his visit, Dr. Mabaya was able to accomplish the following:

- Gather and update baseline information on each Fellow company (including mission, objectives, organizational structure, operations, products, and market coverage and financial data). Building a comprehensive profile of each company will help SODP coordinators understand the unique circumstances facing each firm. (Summarized profiles of Fellow companies are given in Appendix A.)

Additionally, this information will be used as a benchmark to monitor and evaluate the success of the SODP.

- Gather company information and take photographs of operations, staff, facilities and products that will be used to update your company's profile on the SODP website.
- Conduct a one-on-one needs assessment survey that will identify the critical constraints facing each company and how best the SODP can meet your needs. This information was used in designing a work plan for the third year.
- Discuss logistics for seed industry field tour to India. The Fellow companies participating in the field trip helped in designing and itinerary that meet their needs and expectations.
- Identify potential candidates in each company for Making Markets Matter workshop in 2005. Marketing and operations managers were targeted for the 2005 workshop.
- Schedule and plan the SODP Seed Trading Forum that is tentatively planned for June 2004. During this visit, Dr. Mabaya got ideas from Fellows on how this activity should be structured, where it should be held and a time that is suitable for all/most fellows.

Throughout the year, Dr. Mabaya and other staff from Market Matters. Inc. and Cornell University's Emerging Markets Program were available for consultation with the fellow companies. Much of the consultation involved planning and designing market plans to effectively target smallholder farmers.

## **STUDENT ATTACHMENTS**

The SODP believes that creating attachment opportunities for students with Fellow companies will contribute to long-run capacity building for the seed industry in East and Southern Africa. In January 2005, Dr. Edward Mabaya led a group of four Cornell University students with wide ranging business management background on a study trip to Uganda. During the ten-day visit, the students met with representatives of two seed companies, FICA Seeds and Victoria Seeds. After familiarizing themselves with each company's organizational structure and operations, together with company officials the students identified several areas of need within each company. Based on their professional experiences and classroom expertise, students were assigned to work on the following project areas: review and critique the companies' strategic business plans, develop a comprehensive marketing plan, and create company websites with better e-business capabilities. At the end of the visit, the students presented their analysis and recommendations to the management staff from each company. They also offered to be available for further consultation via e-mail or phone for up to three months after the attachment. Also, the students have completed a case study of Victoria Seeds that will be used in future training activities.

Figures 1 and 2 show the homepages of two websites designed by Cornell University students as part of the attachments. For a detailed look at these websites, please visit [www.victoriaseeds.com](http://www.victoriaseeds.com) and [www.ficaseeds.ug](http://www.ficaseeds.ug) respectively. The website have brought on online presence to the companies and have helped enhance their professional world class image.



Figure 1: Website for Victoria Seeds developed by Cornell University students – [www.victoriaseeds.com](http://www.victoriaseeds.com)

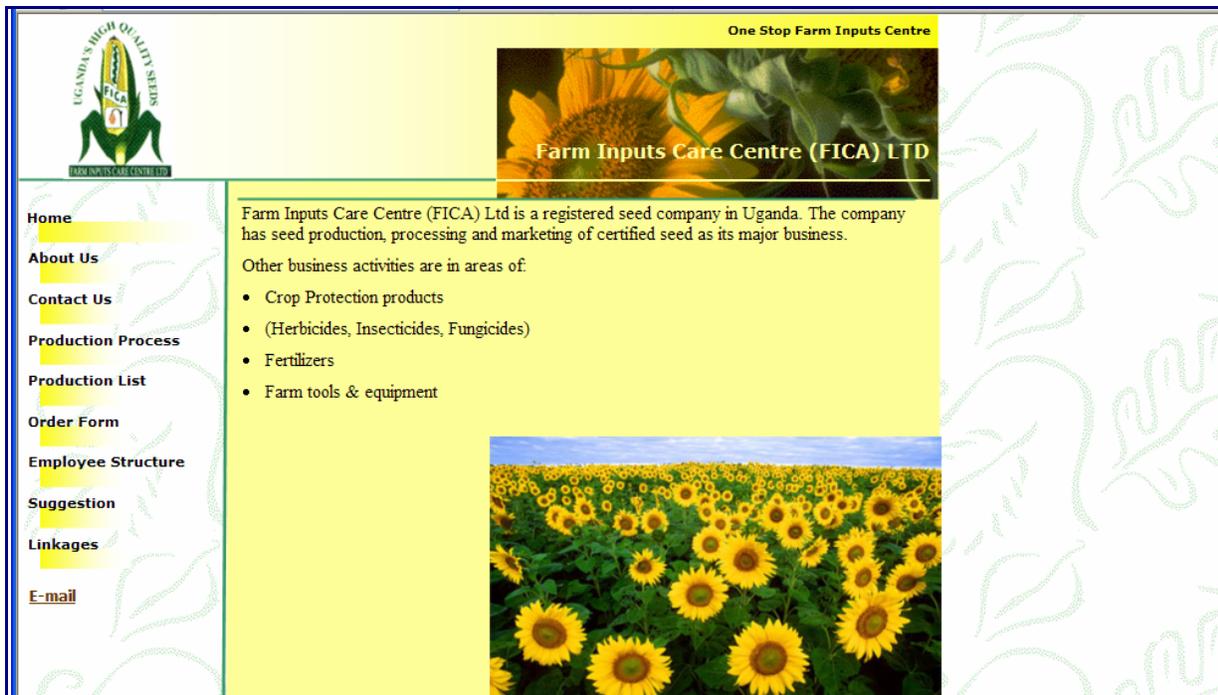


Figure 2: Website for Victoria Seeds developed by Cornell University students – [www.ficaseed.ug](http://www.ficaseed.ug)

## FIELD TRIP TO INDIA

Field visit to India: In February 2005, Dr. Edward Mabaya led a study tour to India. The objective of this field trip was to expose African seed companies to the seed industry in India, so that they could learn relevant aspects of the seed supply-chain and management including the areas of production and quality control, processing facilities and packaging, inventory control, marketing and distribution, seed certification procedures, intellectual property rights management. The companies were also able to explore business opportunities with Indian seed companies. The following eight people participated in the study tour:

1. Ms. Josephine Okot - Managing Director of Victoria Seeds based in Kampala, Uganda.
2. Ms. Jackie Atim – Seed Processing Supervisor, Victoria Seeds, Kampala, Uganda
3. Mr. Chris Kaijuka – Managing Director of FICA seeds Ltd. based in Kampala, Uganda.
4. Mr. Kalinda Peter - Quality Control and Processing Manager for FICA Seeds based in Kampala, Uganda.
5. Mr. Mahenye Chacha Muya - Managing Director of Suba Agro Ltd. based in Arusha, Tanzania.
6. Dr. Scholastica J. Onditi - Director of Operation at Suba Agro Ltd. based in Arusha, Tanzania
7. Mr. Mand Rajinder Singh – Managing Director of Zenobia Seeds Ltd., based in Arusha, Tanzania.
8. Mr. John Makoni – Managing Director of Pristine Seeds based in Harare, Zimbabwe
9. Dr. Edward Mabaya – SODP Coordinator from Cornell University, Ithaca, USA.

**Table 2. India Field Trip Itinerary**

Date	Activity
February 18 <sup>th</sup> /19 <sup>th</sup>	Fellows arrive in Mumbai (Bombay)
February 20 <sup>th</sup>	Depart for Aurangabad Departing Mumabi at about 10:00am.
February 21, 22	Visit with Mahyco Seed Co. For more information please visit <a href="http://www.mahyco.com">www.mahyco.com</a>
February 23 <sup>rd</sup>	Visit with Bejo Sheetal Seeds Pvt. Ltd For more information visit <a href="http://www.bejosheetalseeds.com/">http://www.bejosheetalseeds.com/</a>
February 24 <sup>th</sup> & 25 <sup>th</sup>	Visit other seed companies depending on individual needs.
February 26 <sup>th</sup> & 27 <sup>th</sup>	Fellows depart India

The boxed text below summarizes results from the evaluation form given to participants at the end of the field trip.

## Results from the India Field Trip Evaluation

The checked options indicate the average responses

	Strongly agree	Agree	Neutral	Dis-agree	Strongly disagree
1. The Field Trip was a good idea	1✓	2	3	4	5
2. The schedule was appropriate	1	2✓	3	4	5
3. The Field Trip was well organized	1	2✓	3	4	5
4. The Field Trip fulfilled its objectives per the description	1	2✓	3	4	5
5. The Field Trip met my expectations	1✓	2	3	4	5
6. I learned about the India's seed sector	1✓	2	3	4	5
7. I would like to attend a similar field trip in the future	1✓	2	3	4	5
8. I would recommend the field trip to other seed companies	1✓	2	3	4	5
9. The visit to Mahyco was interesting and beneficial	1	2✓	3	4	5
10. The visit to Bejo Sheetal was interesting and beneficial	1✓	2	3	4	5

11. The field trip was: *50% indicated that it was the right length, 50% indicated that it was too short.*

12. What were the strengths of the Indian field trip?

- *exposure to very large and medium seed companies;*
- *field observations of variety potential;*
- *meeting manufacturers of seed processing equipment & machinery;*
- *training in quality assurance;*
- *relevant to African seed sector;*
- *willingness of Indian seed companies to assist and trade with SODP fellows;*
- *openness of Indian seed companies to show their research facilities.*

13. What were the weaknesses of the Indian field trip?

- *poor organization particularly accommodation exposing SODP fellows to health risk;*
- *food inflexibility;*
- *not enough time to visit south & north of India;*
- *short time to conclude business deals;*
- *not enough time to learn about Indian seed sector.*

14. Were you able to explore business opportunities during the field trip? If yes, please specify collaborative partners and nature of deals.

- *marketing of Bejo varieties in Uganda;*
- *purchase of vegetable canning scanner & machinery;*
- *supply of flower seeds from Mahyco;*
- *supply of seeds and seed processing equipment from Bejo;*
- *supply of vegetable seeds from Bejo and Mahyco;*
- *help in breeding and biotech from Bejo and Mahyco.*

15. What is your willingness to pay for a similar field trip in the future?

*Average willingness to pay was 33% of full cost*

## **DISTANCE LEARNING**

**Workshop Handbook:** At the Making Markets Matter 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.

### **Resource Website:**

A web based information resource center has been developed to enable timely access to current information relevant to the seed industry ([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.

## **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 masters thesis studies were completed in the second year on the seed industry in Africa that will guide private company strategies and public policy. Helder Zavale, a n MS student in Cornell University's Department of Applied Economics and Management, has completed his research entitled: *Analysis of Mozambique's Maize Seed Industry: What Factors Influence The Adoption of Improved Seed By Smallholders and What are the Determinants of Smallholders' Cost Efficiency?* Sonali Roy has also complete a study entitled *Private and Public Sector Partnerships as a Strategy for Agricultural Biotechnology Investments into Sub-Saharan Africa: A Real Options Application.* Angella Atuhairwe has completed an MPS paper investigating *Strategies to Enhance the Sustainability and Competitiveness of the Uganda Seed Industry.* Copies of all three studies will be sent to the Rockefeller Foundation under separate cover.

Table 3 gives a comprehensive list of research products in various stages of completion under the Emerging Markets Program.

## **EMERGING IMPACTS OF SODP NETWORKING**

The opportunities available to Fellow companies through the SODP training and networking activities have enabled these small start-up companies to improve competitiveness compared to established multinational companies. The CEOs of the Fellow companies have benefited from scale economies and have taken advantage of their linkages through SODP to share information, develop joint market entry strategies,

and are currently preparing for the planned harmonization of regional seed trading regulations. Below are some examples of such collaboration.

- At the seed trading forum, new entrant Qualita Seeds (Mozambique) has negotiated for an export deal from its vegetable seeds with Kamano Seeds (Zambia), Tanseeds International (Tanzania) FICA Seeds (Uganda), Frescco Seeds (Kenya) and MRI (Zambia). Qualita has also agreed to do seed production for Zanobia Seeds, and set up a Macadamia nursery for Freshco. Finally, Qualita intends to partner with Victoria seeds to import vegetables in bulk from India.
- Following the recent field trip to India, five SODP Fellow companies, represented by John Makoni of Pristine Seeds (Zimbabwe), are currently negotiating a deal with an Indian agrochemical company - United Phosphorus, Ltd – to jointly source seed treating chemicals at lower prices than domestic suppliers.
- FICA Seeds, Ltd. (Uganda) is partnering with Pristine Seeds (Zimbabwe) to supply seeds to an underserved market of Malawi. The company has already been registered in Malawi and seed trials are already.
- Pristine Seeds is marketing many of its products through another fellow company in Zimbabwe (National Tested Seeds).
- Last year, Suba Agro-Trading (Tanzania), a relatively small startup company 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 \$60,000), FICA Seeds in Uganda (\$85,000) and Victoria Seeds in Uganda (\$65,000). “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 there varieties through local partners.
- Western Seed Company (Kenya) has exported 250 tons 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.

**Table 3. Related Publications from the Emerging Markets Program**

<b>Authors</b>	<b>Title</b>	<b>Targeted Outlet</b>	<b>Status</b>
<b>Books/ Proceedings</b>			
R. Christy, E. Mabaya, M. Karaan	Marketing Strategy Handbook	M.M. Inc.	Completed*
E. Mabaya	Seed delivery systems in East and Southern Africa	-	Early
<b>Theses</b>			
H. Zavale	Analysis Of Mozambique's Maize Seed Industry: What Factors Influence The Adoption Of Improved Seed By Smallholders And What Are The Determinants Of Smallholders' Cost Efficiency?	MS Thesis	Completed*
S. Roy	Private And Public Sector Partnerships As A Strategy For agricultural Biotechnology Investments Into Sub-Saharan Africa	MS Thesis Paper	Completed*
A. Athuhairwe	Strategies To Enhance The Economic Performance Of Selected Seed Firms In The Uganda Seed Industry	MPS Paper	Completed*
<b>Journal Articles</b>			
E. Mabaya	Spatial Market Integration Under Discontinuous Trade: An Analysis of Urban Spot Markets in Zimbabwe	Economie Rurale	Published*
E. Mutambatsere, E. Mabaya, R. Christy	Integration and Efficiency of Cereal Markets in Southern Africa	Journal of International Agricultural Economics	Early
E. Mutambatsere	Welfare Analysis of Trade Policy Reforms in Southern Africa: Case of Malawi	AEM Staff Paper	Early
N. Mhlanga	Foreign Direct Investment and Economic Growth in sub-Saharan Afr.	AEM Staff Paper	First Draft
H. Zavale, E. Mabaya, R.Christy	Adoption of Improved Seeds Among Smallholders in Mozambique	AEM Staff Paper	Under review
H. Zavale	The Effect of Improved Seed on On-Farm Technical Efficiencies	AEM Staff Paper	Early
S. Roy	Intellectual Property Rights and the Structure of Seed Industries in Developing Countries	AEM Staff Paper	
<b>Case Studies</b>			
A. Atuhairwe	FICA Seeds, Ltd.	In-house case book	Under review
E. Mabaya et al.	Victoria Seeds, Ltd.	In-house case book	Under review*
<b>Presentations</b>			
E. Mabaya	"Pricing Efficiency Under Discontinuous Trade: An analysis of Urban Spot Markets for Tomatoes in Zimbabwe"	AEASA meetings	Presented 09/2005
E. Mabaya	SODP: Innovative capacity building and networking for small to medium sized seed companies in East and Southern Africa	RF & KARI workshop	Presented 01/2005
E. Mabaya, R.D. Christy	Marketing Opportunities and Challenges for African Fruits and Vegetables	IFT annual meetings	Presented 07/2005

\* Documents sent to The Rockefeller Foundation under separate cover

**UPDATED WORK PLAN (July 2005)**

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 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 A: Thesis Abstracts**

1. Zavale, H., *Analysis of the Mozambique's Maize Seed Industry: Factors Influencing Adoption Rates Of Improved Seed By Smallholders And Determinants Of Smallholders' Cost Efficiency*, MS Thesis.
2. Roy, S., *Private And Public Sector Partnerships As A Strategy For Agricultural Biotechnology Investments Into Sub-Saharan Africa: A Real Options Application*, MS Thesis
3. Atuhairwe, A., *Strategies to Enhance the Economic Performance of Selected Seed Firms in the Uganda Seed Industry*, MPS paper.

## **Analysis Of The Mozambique's Maize Seed Industry: Factors Influencing Adoption Rates Of Improved Seed By Smallholders And Determinants Of Smallholders' Cost Efficiency**

**MS Thesis Abstract by**

**Helder Zavale**

Agriculture, characterized by very low input use, is an important economic activity in Mozambique in which fifty-four percent of the population is poor and sixty-eight percent of the population lives in rural areas. Maize is one of the staple foods and one of the most important crops produced in Mozambique where millions of smallholders depend on this crop as source of income and food security. Since the 1960s, the maize production in Mozambique has increased mainly due to the expansion of cultivated area while maize yields have stagnated. This expansion in cultivated area has become environmentally, economically, and technically unsustainable. To alleviate this problem, Mozambique has to enhance its agricultural productivity urgently. Productivity can be increased through improved varieties and better management; however, productivity benefits will not be realized unless substantial improvements are made in seed production and distribution systems.

This thesis describes the salient organizational features of the seed marketing systems in Mozambique. To identify the main factors influencing the adoption of improved maize seed by farmers and to estimate on-farm cost efficiencies, data were collected in 2002 on 4,908 farming smallholders. Using Probit regression, the main factors influencing adoption rates are identified. Also, employing an econometric approach of stochastic frontier with self-selectivity, cost efficiencies are estimated.

Empirical results of adoption analysis indicate that household size; age; education; off farm employment; location (southern, central, and northern agro-ecological zone); access to extension service, credit, seed stores, and electricity; use of pesticide, fertilizer, and irrigation; and farming of traditional cash crops (cotton and tobacco) are the determining factors influencing the probability of adopting improved maize seed. Econometric findings of stochastic cost frontier analysis illustrate that the average cost inefficiency is 40 percent, suggesting that with the technology currently employed, an estimated 40-percent increase in total variable cost is due to a combination of technical, allocative, and economic inefficiency in maize production. The cost efficiency differences are explained significantly by household size, gender of the household head, age, education, use of pesticide, access to credit, distance to county seat, land fragmentation, maize cultivated area.

Policy makers, seed companies, donor agencies, NGOs, and farmers are faced by critical challenges to improve the seed systems in Mozambique. To minimize those critical challenges, the government could transfer public sector distribution systems to more efficient private ones. Policy makers must be committed to creating a political environment and institutions favorable for private sector development. Also, it should prioritize the creation of private sector market networks for integrated input marketing that is stimulated by improved access to credit, input supplies, and institutional capacity. This priority should be complemented by: (1) non-price interventions to improve output marketing, (2) technical and managerial assistance to private sector entrepreneurs, and (3) improved collection and dissemination of market information.

## **Private And Public Sector Partnerships As A Strategy For Agricultural Biotechnology Investments Into Sub-Saharan Africa: A Real Options Application**

**MS Thesis Paper Abstract  
By Sonali Roy**

The degree of research on institutional innovation of the agricultural biotechnology sector currently focuses on the social, economic and political relationships inherent in the scientific and product development in the private and public sectors as separate entities. What makes or breaks the decision for an MNC to enter an emerging market beyond incentives for profit-maximization? What role exist for public-private partnerships as a mechanism for value capture in agricultural biotechnology investments into uncertain markets?

The purpose of the study is to clarify the barriers in regulatory process, intellectual property rights and infrastructure development and how it relates to developing an appropriate model for technology transfers from the perspective of public-private sector partnerships into emerging markets. At a granular level, stimulating intellectual and scientific investments in agricultural biotechnology are contingent on prioritization of public policy, wherein optimal investment strategy into developing markets becomes a balance between providing adequate incentives for investment without compensating technological dissemination to smallholders.

The paper takes on the issue at a theoretical and applied level. Real Options theory accounts for a decision to invest in terms of probability of completing a project and offers an alternative to current cost-benefit projections of such investment strategies. Accounting for private sector decision making in environments of uncertainty places emphasis on three 'uncertainties': scientific infrastructure in terms of technical uncertainties; the maturity of the intellectual property and regulatory approval process in terms of regulatory uncertainty; and, the general risk-taking endeavors into agricultural research has an inherent scientific uncertainty. Together, technical, regulatory and scientific uncertainty with the time to wait and complete a project, make-up an opportunity cost associated with the probability that a project will succeed at each junction of the project, till completion.

A strong regulatory environment not only ensures market power for the private industry and but forces change in the general expectations from and attitude towards the hybrid seed and agriculture innovation sector into one conducive to traditional market mechanisms. It is, additionally, imperative to create a linkage between the private sector and the smallholder. Not only are multinationals currently the gatekeepers of intellectual capacity for agricultural biotechnology research, but possess capacity to enter the market and provide products en masses. Short of an idealistic scenario, the lack of immediate profit incentives may be balanced by public sector partnerships that might cushion risks through short-term subsidies and extension to eventually expand market opportunities for the smallholder by creating product loyalty in the long-term.

The objective of the paper is to provide the necessary theoretical framework by which future research may empirically assess the discounted value and probability of R&D investments contingent on the economic climate the agro-biotech industry faces. The model goes beyond agricultural biotechnology investments. A partnership model lays the foundation for creating marketing channels for industries with high fixed costs and high social, public utility value, such as in telecommunications or medicine.

## **Strategies To Enhance The Economic Performance Of Selected Seed Firms In The Uganda Seed Industry**

**MPS paper by**

**Angella Karemani Atuhairwe**

An important step in achieving sustainable agricultural productivity in Uganda lies in the development of an efficient and competitive seed industry. Improved seed varieties are an essential input of all plant-based agricultural systems, since they determine the upper limit on yield potential and therefore the productivity of other inputs. More so, improved seeds have great potential for contributing to the increase in small farm productivity that is so critically needed for national growth and development in many countries in Sub-Saharan Africa.

However, even though the production of improved seed varieties has made considerable progress, uptake is still a major problem. Among the many potential causes of the slow adoption is the lack of a proper market strategy plan, particularly in those countries such as Uganda where the seed industry has recently been privatized. The problem is that the transfer of seed production and distribution to the private sector has left no clear understanding of the different roles of the various stakeholders in the seed supply chain. In other words, what is the proper role of the government and the private sector after the reforms? What strategies should the private sector adopt in order to serve rural farmers profitably? What is the ideal market environment under which the private sector can serve the rural farmer a sustainable manner? Is there a proper mix of policies that can provide a suitable environment that will encourage the growth of the private seed sector? This situation is further compounded by the uncertainty in the market environment, an ambiguous policy environment, and a lack of proper institutions and infrastructures.

The purpose for this research is to study the organization, structure and market strategies of a firm in the Uganda Seed Industry, and establish strategies that can be put in place to improve the economic performance of this firm. Through a careful review of literature and application of the case study approach, this study reports how firm strategy can be improved, and suggests ways in which government can better facilitate the growth of the seed industry.

To achieve the objectives of this study, a mixed methods approach was used. The methods included; literature review, one on one interviews, conceptual frameworks, document reviews and a case study approach. The models of analysis (conceptual frameworks) used were instrumental in analyzing the general environment within which the firms are operating (PEST analysis), the seed supply chain and seed industry analysis (Porters five forces model). Those tools helped to design appropriate strategies for the seed companies.

A case study approach is taken where by data was collected from selected stakeholders at each stage in the maize seed supply chain, as a representation of all the participants in the chain. The approach was employed because of limited resources that were available to gather primary data. To gain insight in the behavior of firms in the industry, a case study of FICA was performed.

## **Appendix B: Fellow Company Profiles**

1. FICA Seeds
2. Victoria Seeds
3. Harvest Farm Seeds
4. Freshco Seeds Ltd.
5. Western Seeds
6. Lagrotech Seed Company
7. Zenobia Seeds
8. Tanseed International
9. Subra Agro Trading
10. Prestine Seeds
11. National Tested Seeds
12. Nhimbe Seeds
13. MRI Seeds
14. Kanamo Seeds
15. Qualita Seeds

# FICA Seeds

**Established:** 8<sup>th</sup> August, 1999

**Contact details:** Plot 167 Bombo Road  
 P.O. Box 34095, Kampala, Uganda  
 Telephone: 256 41 566631  
 Fax : 256 41 567159  
 Email : fica.project@mail.com

**Company's Website:** www.ficaseeds.ug

## Company senior management

Name	Position	Telephone	Email
Chris Kajjuka	CEO	256 75 374106	ckajjuka@ficaseeds.ug
Mubangizi Emmanuel	General manager	256 77 454288	emubangizi@yahoo.ug emubangizi@yahoo.co.uk
Justus Imanywoha	Breeder	256 78 395688	
Bisaso Bernard	Finance manager	256 75 630054	bbisaso@ficaseeds.ug bernardbisaso@yahoo.co.uk
Kalinda Peter	Quality control & processing manager	256 77 625301	

## Company's mission statement:

- To increase the wealth of our shareholders by increasing the wealth of farmers through producing, processing, and marketing high quality seeds and other agro-inputs at affordable prices for farmers.

## Company's objectives:

- To produce, process, and market high quality seeds to farmers;
- To deliver customized seed packs according to farmer requirements through use of modern technology in seed processing, packing, and weighing;
- To catalyze diffusion of new improved plant varieties to our customers and farmers;
- To train seed growers in seed agronomy practices, and enable the growers to make the best of new varieties in the widest range of their farming environments;
- To maintain competitiveness through marketing of differentiated agro inputs;
- To maintain pure planting material lines obtained from public research institutes and own research and development programs;
- To retain a motivated workforce through training, fair compensation, and staff development programs; and
- To maintain a corporate public responsibility to farmers, government, and all stakeholders.

## Institutional affiliation

Institutions	Relation to the company
National Agricultural Research Organization (NARO)	Research and development
United Nations Development Program (UNDP)	Promotion of upland rice growing
Enterprise Uganda	Training
Makerere University	Internship for agriculture students
Uganda Seed Trade Association (USTA)	Founder member

## Victoria Seeds

**Established:** October, 2003

**Contact details:** Plot 201 6th Street  
 P.O. Box 11913, Kampala, Uganda  
 Telephone: 256 31 262949, 254 071 467365  
 Fax : 256 41 230364  
 Email : victoriaseeds@infocom.co.ug

**Company's Website:** [www.victoriaseeds.com](http://www.victoriaseeds.com)

### Company senior management

Name	Position	Telephone	Email
Josephine Okot	Managing director	256 077 467365	victoriaseeds@infocom.co.ug
William Nyakoojo	Distribution manager	256 077 514576	victoriaseeds@infocom.co.ug
Sammy Tumwesigye	Extension service manager	256 071 923079	victoriaseeds@infocom.co.ug
Jackie Atim	Veg. development manager	256 075 896927	victoriaseeds@infocom.co.ug
Gabriel Iputo	Seed production manager	256 077 879204	victoriaseeds@infocom.co.ug

### Company's mission statement:

- To increase agricultural productivity and rural incomes through efficient production and marketing of superior and appropriate seed varieties.

### Company's objectives:

- To diversify Uganda's export market potential by engaging in seed production and supplying high value vegetable seeds;
- To promote high input farming to expand production of cropped areas and therefore eradicate hunger and increase rural incomes;
- To supply improved seeds and planting materials as affordable prices;
- To build capacity in quality assurance management and marketing so that the seed industry is driven by a profitable private sector; and
- To maintain international linkages with seed associations and sub regional initiatives.

### Institutional affiliation

Institutions	Relation to the company
National Agricultural Research Organization (NARO)	Technology access
International Society of Seed Technologists	Member
African Seed Trade Association	Board member
Makerere University	Research product development
Uganda Seed Trade Association (USTA)	Past chair

## Harvest Farm Seeds

**Established:** January, 2000

**Contact details:** Plot 34/36 Kibira Road  
P.O. Box 8166, Kampala, Uganda  
Telephone: 256 41 349868, 256 78 454644  
Fax : 256 41 344174  
Email : cei@starcom.co.ug

**Company's Website:** www.harvestseeds.com

### Company senior management

Name	Position	Telephone	Email
Dr. Mukiri wa Githendu	General manager	256 41 349868 256 78 454644	mukiri@hotmail.com cei@starcom.co.ug
Mr Ravidaar	Financial controller	256 41 345825	cei@starcom.co.ug
Mr Peter Meni	Seed manager	256 78 520936	cei@starcom.co.ug

### Company's mission statement:

- To increase farm productivity and income through sustainable production and marketing of superior varieties.

### Company's objectives:

- To increase crop farming productivity in the region by sustaining production and distribution of improved seed varieties to farmers;
- To eradicate hunger and increase rural household income by promoting high input farming and transforming subsistence agriculture into commercial agriculture; and
- To remain a market leader in the region by continually researching for new plant genetic resources giving farmers access to new and better performing varieties that improve their yield and food production.

### Institutional affiliation

Institutions	Relation to the company
Uganda Seed Trade Association (USTA)	Founder member
African Seed Trade Association	Member
Uganda Grain Traders' Association (UGT)	Associate member trough CEI Ltd

## Freshco Seeds

**Established:** 2000

**Contact details:** P.O. Box 27659 - 00506  
 Nairobi, Kenya  
 Telephone: 254 20 3753122  
 Email : freshco@insightkenya.com

### Company senior management

Name	Position	Telephone	Email
P. K. Munga	Chairman	254 20 3753122/3	pmunga@equatorialnut.com
J. G. Karanja	Managing director	254 20 3753122/3	freshco@insightkenya.com
J. K. Kanjagua	Seed production & processing manager	254 20 3753122/3	freshco@insightkenya.com
J. M. Keli	Sales & marketing coordinator	254 20 3753122/3	freshco@insightkenya.com
J. M. Thuku	Finance manager	254 20 3753122/3	freshco@insightkenya.com

### Company's mission statement:

- To increase the wealth of our shareholders by increasing the wealth of small scale farmers through provision of quality and other improved planting materials.

### Company's objectives:

- To leverage our relationship with sources of germplasm and our core competencies to innovate, originate, and realize our mission;
- To produce and provide seed and improved planting materials to small scale farmers;
- To catalyze diffusion of new technologies to our customers, which not only increase food supply but also generate extra income for farmers and create value in the food and wealth creation systems;
- To enable small scale farmers to make the most of new varieties in the widest range of agro-ecological situations;
- To integrate poverty reduction considerations into all aspects of our business by creating markets for farmer produce by providing linkage towards processing and marketing of the value added products.

### Institutional affiliation

Institutions	Relation to the company
Kenya Agriculture Research Institute	License of germplasm
CIMMYT	Source of germplasm
Seed Trade Association of Kenya (STAK)	Trade lobby group
African Seed Trade Association (AFSTA)	
Cereal Growers Association of Kenya (CGA)	
Macadamia Society of Kenya	

## Western Seeds

Established: 1990

Contact details: P.O. Box 1022, Kitale, Kenya

Telephone: 254 54 30232, 254 54 30994, 254 20 890804

Fax : 254 54 31282, 254 20 891444

Mobile : 254 073 5691895, 254 072 4834809

Email : western@swiftkenya.com

Company's Website: www.westernseed.net

### Company senior management

Name	Position	Telephone	Email
Saleem Esmail	CEO/breeder	254 072 2514236	western@swiftkenya.com
Samina Esmail	Director	254 072 2716070	wsg@swiftkenya.com
Osman Bokhasi	Commercial manager	254 072 4268181	osmanb@gmail.com
William Amutiki	Production manager	254 072 2688998	

### Company's mission statement:

- To bring technology to the farmer.

### Company's objectives:

- To timely avail new technology to farmers;
- To improve efficient delivery to farmers;
- To achieve 5,000 metric tons of hybrid seed production and sales in the next two years;
- To create and maintain efficient management system;
- To increase capital base; and
- To afford investments in new technologies.

### Institutional affiliation

Institutions	Relation to the company
Seed Trade Association of Kenya (STAK)	Member executive committee

## Lagrotech Seed Company

Established: 19<sup>th</sup> April, 2000

Contact details: P.O. Box 1244, Kisumu, Kenya

Telephone: 254 057 2024182

Fax : 254 057 2024182

Email : lagrotech@lagrotech.org or ojknowles2003@yahoo.com

### Company senior management

Name	Position	Telephone	Email
Dr. Moses Onin	Managing director	254 057 2024182	lagrotech@lagrotech.org
James Opiyo	Marketing manager	254 072 2674451	Ojknowles2003@yahoo.com

### Company's mission statement:

- "Quality our strength, customer the king".

### Company's objectives:

- To widen the plant and animal genetic base and avail it to the local farmer at minimized cost, and
- To collaborate with fellows on research front to spearhead poverty alleviation.

### Institutional affiliation

Institutions	Relation to the company
Kenya Agricultural Research Institute	Research partner
Agricultural Market Development Trust (AGMARK)	Partner
Kenya Plant Health Inspectorate Service (KEPHIS)	Ascertain proper phyto standards
CIMMYT	Collaborator
CABI	Research partner

## Zanobia Seeds

**Established:** 1998

**Contact details:** P.O. Box 114, Arusha, Tanzania

Telephone: 255 27 250348

Fax : 255 27 6323

Mobile : 255 748 503490

Email : dodomatransportltd@yahoo.com

### Company senior management

Name	Position	Telephone	Email
S. S. Mand	Managing director	255 744 301444	Dodomatransportltd@yahoo.com
D. S. Mand	Director farms	255 27 2503948	
H. S. Mangat	Production	255 748 503489	
R. S. Mand	Marketing/management	255 748 503490	
D. P. S. Mand	Finance/logistic	255 748 503489	

### Company's mission statement:

- To produce affordable and quality seeds for farmers.

### Company's objectives:

- To produce seeds for small to medium size farmers, and
- To bring development to rural poor.

### Institutional affiliation

Institutions	Relation to the company
Technoserve	Marketing linkages
Selian Agricultural Research Institute (SARI)	Source of parent seed
CEAT/ECOBREN	Seed production
Seed Growers Association of Tanzania	Member

# TANSEED International

**Established:** 2000

**Contact details:** Farm No 127 Kibena, Makambako Road  
P.O. Box 140, Njombe, Tanzania  
Telephone: 255 26 2782354  
Email : tanseed@yahoo.com

## Company senior management

Name	Position	Telephone	Email
I. M. Mashauri	Managing director	255 748 352412	tanseed@yahoo.com
E. Simulingindo	Production manager		
S. I. Mashauri	Marketing manager	255 748 348287	skolasticaisaka@yahoo.co.uk
H. Shuma	Finance manager	256 748 297962	tanseed-mbeg@yahoo.co.uk

## Company's mission statement:

- To increase agricultural productivity and rural livelihood through supply of high quality seed varieties.

## Company's objectives:

- To develop, multiply, condition, and supply high yielding quality seed of all types suited to each agro ecological conditions in Tanzania and other parts of the world as contribution to the success of the modern agriculture with the current cross-cutting issues such as environmentally compatible agricultural production and safeguarding the competitiveness of agricultural operations.

## Institutional affiliation

Institutions	Relation to the company
Tanzania Plant Breeder Association	Member
Tanzania Seed Trade Association	Member

# Subra Agro Trading

**Established:** 2001

**Contact details:** P.O. Box 14702, Arusha, Tanzania  
Telephone: 255 27 254854, 255 27 2507020  
Fax : 255 27 2548541  
Email : satec2000tz@yahoo.com

## Company senior management

Name	Position	Telephone	Email
M. N. C. Muya	Managing director	255 74 4278404	m_muya@yahoo.com
J. M. Orondo	Marketing & technical director	255 74 4372187	satec2000tz@yahoo.com
S. Nnko	Seed production manager	255 74 8362696	satec2000tz@yahoo.com
W. Chacha		255 74 4688642	goryotz@yahoo.co.uk

## Company's mission statement:

- To empower farmers in Tanzania through provision of agro-inputs and promotion of profitable and sustainable productivity in agriculture.

## Company's objectives:

- To expand in quality and quantity of: i) agro-inputs (seeds and agrochemicals) distribution, ii) agro-technological dissemination, and iii) agro-output market (agro processing and export);
- To build up technological base so as to become local manufacturer/producer of inputs; and
- To research and develop seed varieties and agrochemicals.

## Institutional affiliation

Institutions	Relation to the company
Tanzania Seed Traders Association (TASTA)	Member
Crop Life Tanzania (Agrochemical association)	Member
CIMMYT	Member – ECAMAW project code T (QPM)
SeedCo	Principal supplier
Bakker Brothers	Principal supplier
Bejo Seeds	Principal supplier
Dow Agro Science	Principal supplier

## Pristine Seeds

**Established:** October, 2003

**Contact details:** 280 Sherpperton Road  
P. O. Box 1277 Marondera Zimbabwe  
Telephone: 263 114 16596

### Company senior management

Name	Position	Telephone	Email
John Makoni	Managing Director	263 11 500 242	johnmakoni@yahoo.co.uk
Takemore Chagomoka	Operations Manager	263 23 781 352	takemore@tsamail.co.za chagomoka@classicmail.co.za
Jerrymot Matsike	Finance & Admin Manager	263 11 512 531	jerrymatsike@yahoo.com
Youth Chabona	Accountant	263 91 951 312	youthc@classicmail.co.za

### Company's mission statement:

- To contribute to the livelihood of African farmers through quality seeds, while improving the economic well-being and quality of the life of all stakeholders.

### Company's objectives:

- To be a major player in the seed industry in Southern and East Africa;
- To provide quality seed products and services to the Southern and East Africa Seed Sector; and
- To stand out as a center of excellence both in economic and human issues in the Southern and East Africa seed sector.

### Institutional affiliation

Institution	Relation to your company
Zimbabwe Seed Traders Association (ZSTA)	
CIMMYT	
ICRISAT	
Tobacco Research Board (TRB)	

## National Tested Seeds

**Established:** 1978

**Contact details:** P.O. Box 2705, Harare, Zimbabwe  
Telephone: 263 4 310284  
Fax : 263 4 331050  
Email : lance-nts@kencor.co.zw

Company's Website:

### Company senior management (awaiting information)

Name	Position	Telephone	Email
Lance Kennedy	General manager	263 4 310284	lance-nts@kencor.co.zw

### Company's mission statement:

- To be the leading seed house in Africa, recognized globally as the supplier of high quality products that provides exceptional customer service.

### Company's objectives:

- To be 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.

### Institutional affiliation (awaiting information)

Institutions	Relation to the company
International Seed Trade Association	Member

## Nhimbe Seeds

**Established:** 2003

**Contact details:** P.O Box 393 Ruwa, Harare, Zimbabwe  
Telephone: 264 4 334226/332017/303894  
Fax : 264 4 303888

### Company senior management

Name	Position	Telephone	Email
Vincent Gwarazimba	Director	263 4 332017	Nhimbes@mweb.co.zw
Fungai S Makwenje	Manager, Human Resources	263 4 334226	
Stern Bani	Accounting Assistant	263 4 334226	
Thomas Pindayi	Warehouse Foreman	263 73 2346	
Tapiwa M.N Gwarazimba	Manager Operations	263 4 334226	

### Company's mission statement:

- To bring value to our customers and support their growth and success;
- To produce and supply seed of the highest quality in a manner that generates profits and satisfaction to our customers, strategic partners and co-workers;
- To maximize the utility of our resources and talents and to improve the quality of life of the society we live and work in; and
- To promote environmental best practice and responsible corporate citizenship amongst all our stakeholders.

### Company's objectives:

- To be an outstanding internally respected institution which proudly affirms its African identity and is committed to best practice in research, seed production and marketing while empowering previously disadvantaged farming communities in its target market; and
- To train farmers in professional seed production and providing a guaranteed market for their products.

### Institutional affiliation

Institutions	Relation to the company
Zimbabwe Seed Trade Association	Member

## MRI Seed

**Established:** 1977

**Contact details:** Plot 5255 Mukwa Rd. (off Lumumba Rd.) Industrial Area  
P.O. Box 33088, Lusaka, Zambia  
Telephone: 260 1 242 244, 260 1 240 281, 260 97 776 522  
Fax : 260 1 240 275  
Email : info@mriseed.com, sales@mriseed.com

**Company's Website:** www.mriseed.com

### Company senior management

Name	Position	Telephone	Email
Dr. Dusan Ristanokic	Managing director	260 1 240 281	dusan@mriseed.com
Vladimire Ristanovic	Managing director	260 1 240 281	vlad@mriseed.com

### Company's mission statement:

- To be dedicated to i) developing the best quality seed available in the market as measured by yield potential, adaptability to agro-ecological conditions, and adaptability to farming practices; ii) providing the highest level of customer service; and iii) maintaining and growing the relationships it has developed with its partners including seed growers and distribution agents.

Company's objectives: (awaiting information)

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Institutional affiliation (awaiting information)

Institutions	Relation to the company

## Kamano Seed Ltd.

**Established:** April, 1994

**Contact details:** Plot 12922 Mombwa Road  
P.O. Box 35330, Lusaka, Zambia

### Company senior management

Name	Position	Telephone	Email
D. F. M. Horemans	Managing director	260 1 286723 260 95 852015	horemansd@zamtel.com
Sylvia C. Horemans	Marketing director	260 1 287068 260 95 807353	horemansd@zamtel.com
Dominic Daka	Sales manager	260 1 286735 260 97 46839	dominiccada@hotmail.com
Jimmy Precious	Farm manager		

### Company's mission statement:

- To ensure food security in the nations by providing high quality seeds.

### Company's objectives:

- To provide high quality seed for the country and nations (Africa at large);
- To improve small scale farmers' life by providing them with the market for their products;
- To improve food security of the nation;
- To satisfy our customers with all our products.

### Institutional affiliation

Institutions	Relation to the company
Seed Control and Certification Institute (SCCI)	Supervision
Zambia Seed Trade Association (ZASTA)	Affiliate
Zambia Farmers Union (ZFU)	Member

## Qualita Seeds

**Established:** 2<sup>nd</sup> February, 2005

**Contact details:** Zona Industrial, Chimoio, Mozambique

### Senior Management

Name	Position	Telephone	Email
Bernhard Van Dyk	Owner/Manager Grain	258 82 6312840	brenda@teledata.mz
Brenda Van Dyk	Owner Manager Vegetables	258 82 555857	brenda@teledata.mz

### Company's mission statement:

- Qualita is a Mozambican company for Mozambican people: producing quality seed, distributing it in an affordable way, and in doing so fighting Mozambican poverty.

### Company's objectives:

- To maximize distribution of seed throughout Mozambique (short to medium term);
- To explore the seed export market (long term); and
- To be financially sound and to be sustainable to produce, process, and market high quality seeds to farmers (perpetually).

### Institutional affiliation

Institutions	Relation to the company
National Institute for Agricultural Research (INIA)	Provider of basic seed