

Markets in Fragile Contexts: Lessons from the Seed Market System in Eastern DRC

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Lourdes Martinez Romero

Dr. Lourdes Martinez Romero is an agricultural economist in USAID's Bureau for Food Security specializing in enabling environment for trade, private sector investment, and inclusive food system development. Before joining USAID, she worked in Africa, Asia, and Latin America looking at regulatory constraints to expand market access for small-scale producers and inclusive value chain and business development. She has a Phd and MS from Michigan State University.



Augustin Ngeleka

Augustin Ngeleka is an agriculture development specialist at the USAID Mission in the Democratic Republic of the Congo. He has worked with USAID since 2008 in the Economic Growth Office, responsible for the monitoring and supervision of agriculture development activities and engaging with the donor community in advocating for improved food security, nutrition, and better agricultural practices. Prior to USAID, he worked more than 10 years with various government agricultural organizations, including the Ministry of Agriculture, Seed Quality Control Service (SENASA), and the National Agricultural Research Institute (INERA). He has an MS in agronomy from Texas A&M University.



Juan Ignacio Trives Pire

Juan Trives is an agronomist and seed systems expert specializing in every aspect of the seed and planting materials sector, from germplasm prospection to breeding, seed production, and intellectual property rights.

Juan served as a technical advisor at the Spanish National Seed Institute and has since worked across central and east Asia, the Middle East, and north and sub-Saharan Africa, where he has provided institutional support and aided capacity building to create efficient legal and institutional frameworks for seed market regulation. He has worked on projects with the World Bank, EuropeAid, USAID, and FAO. Juan served on the Feed the Future Enabling Environment for Food Security project consultant team which carried out the DRC seed system study.

Juan graduated from the Madrid Polytechnic University and holds a postgraduate diploma in plant breeding and seed production from the OECD International Centre for Higher Mediterranean Agronomical Studies.



Roger Shongo

Roger Shongo is a senior agronomist specializing in central and west Africa with a focus on seed security assessments, seed development start-up entrepreneurship in agroforestry, and bio-carbon evaluation.

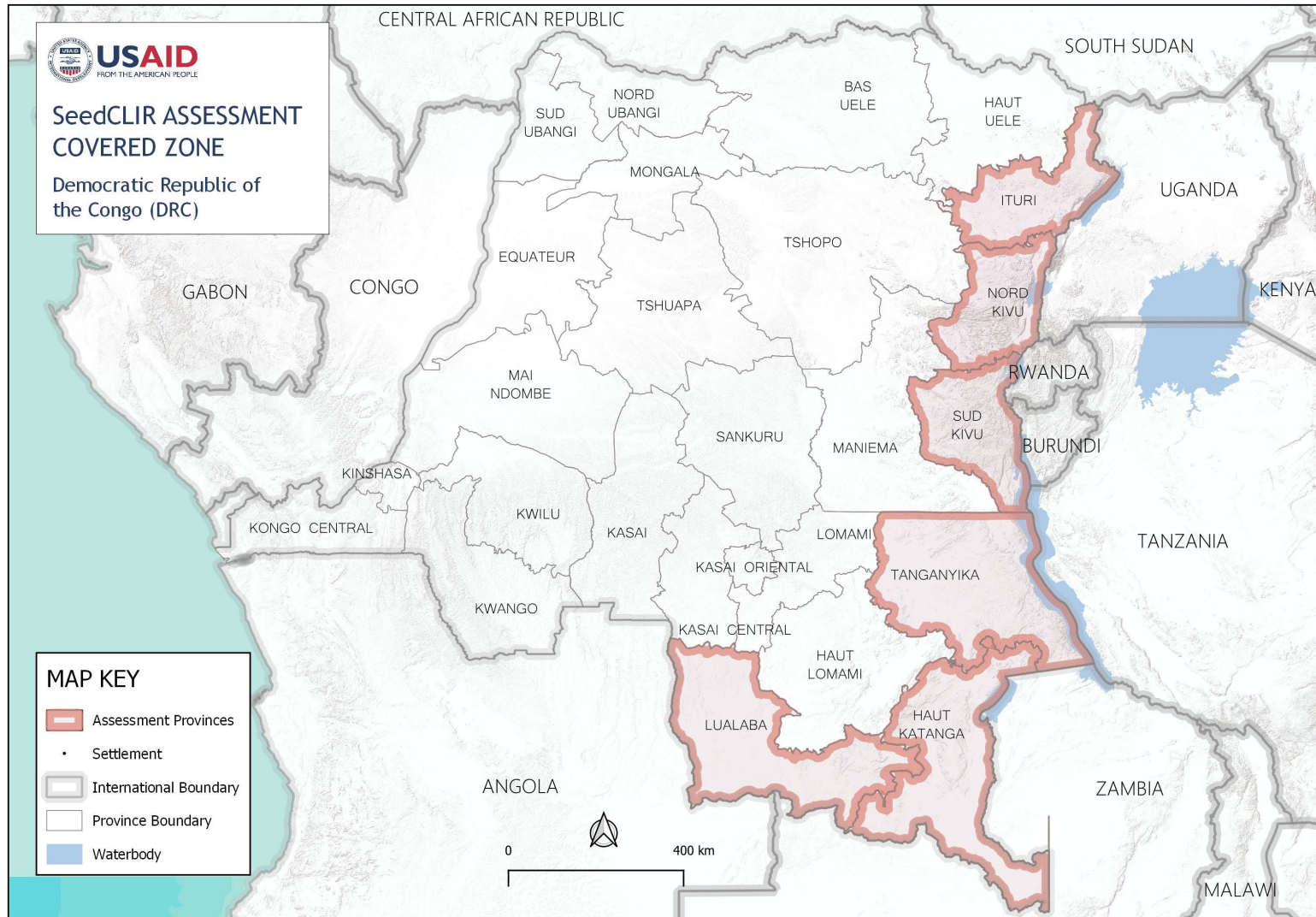
Roger has worked in the DRC as a seed expert at the National Seed Service, followed by serving as the branch head for PMURR, a rehabilitation and reconstruction program, in its seed division. Roger has also worked on emergency and rehabilitation programs in the Central African Republic, on seed security in the Sahel, and seed programs in Chad. His work has supported the World Bank, FAO, UNDP, Swiss Cooperation, and GIZ International Services.

Roger served on the Feed the Future Enabling Environment for Food Security project consultant team for the DRC seed system study. He is a graduate of Université Libre de Bruxelles in Belgium.



USAID/DRC Mission Perspective

- Justification for initiating a seed assessment
 - Address knowledge gaps during the design process of new activities
 - Encourage greater donor and government engagement on seed reform
- Eastern Congo focus
 - Zone of Influence under the Country Development Cooperation Strategy (CDCS)
 - Current value chain investments in coffee, soybeans, and dry beans in South Kivu through the Strengthening Value Chains Activity
 - Availability of good quality seeds undermines food security in communities facing both health (e.g., Ebola) and security threats





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The U.S. Government's Global Hunger & Food Security Initiative

Feed the Future Enabling Environment for Food Security Project

Lessons from the Seed Market System in Eastern DRC

February 6, 2020



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WHAT IS THE OBJECTIVE OF SEED SYSTEM DEVELOPMENT

The success of a crop depends on the quality of the seed used

- The potential for the final crop is defined the moment the seed is placed in the ground
- The type of seed available, at what time, and with what characteristics influence food security and nutritional outcomes

The overall objective of seed system development:

- To facilitate farmer access to quality seed by enabling private sector investment in the production and distribution of affordable, reliable, high-quality seed adapted to their environment

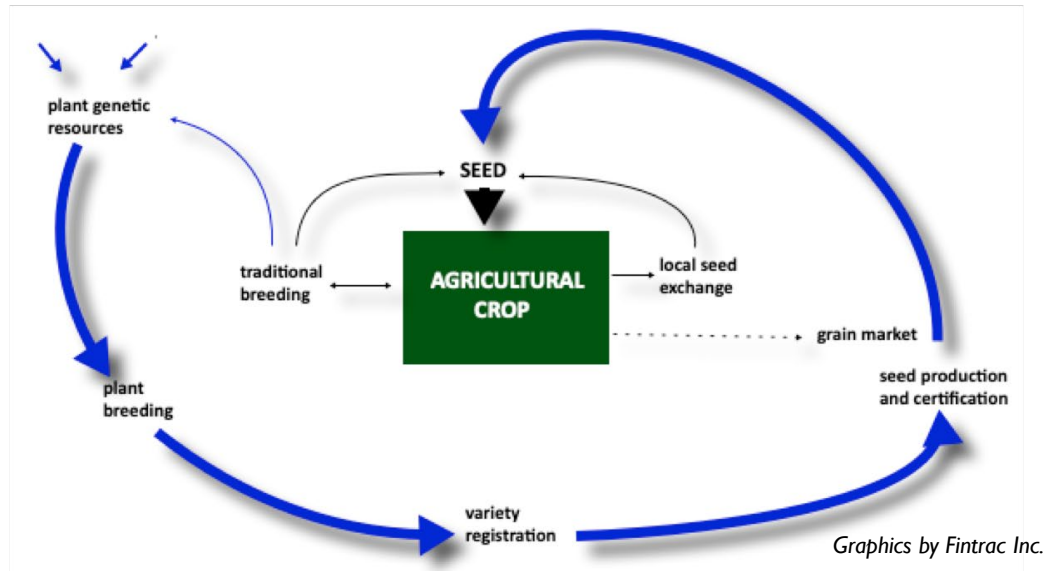


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THE ENABLING ENVIRONMENT FOR SEED: MATURE VS. FRAGILE CONTEXTS

Mature Seed System



- Seed companies respond to farmer demand
- Regulatory system facilitates regular development and release of new varieties

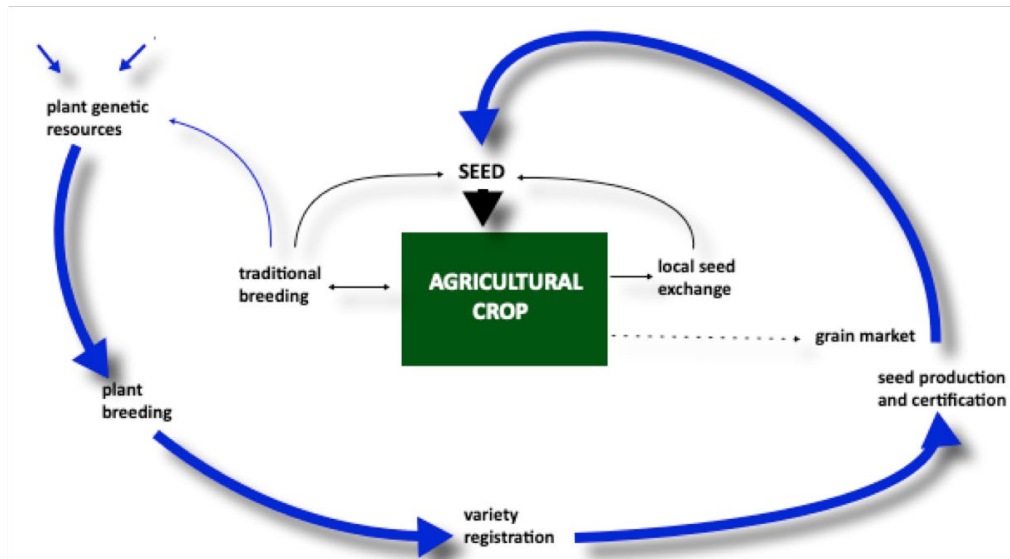


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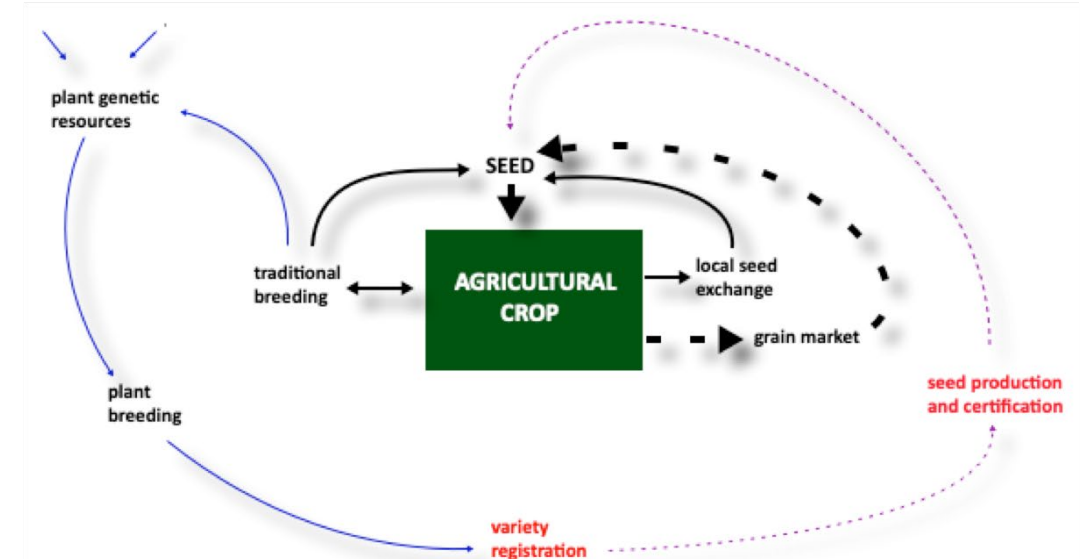
THE ENABLING ENVIRONMENT FOR SEED: MATURE VS. FRAGILE CONTEXTS

Mature Seed System



- Seed companies respond to farmer demand
- Regulatory system facilitates regular development and release of new varieties

Fragile Context Seed System



- Limited commercial agriculture
- Infrastructure damaged or destroyed
- Capacity to regulate seed quality substantially diminished

Graphics by Fintrac Inc.



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SEEDCLIR IN EASTERN DRC: ABOUT THE ASSESSMENT

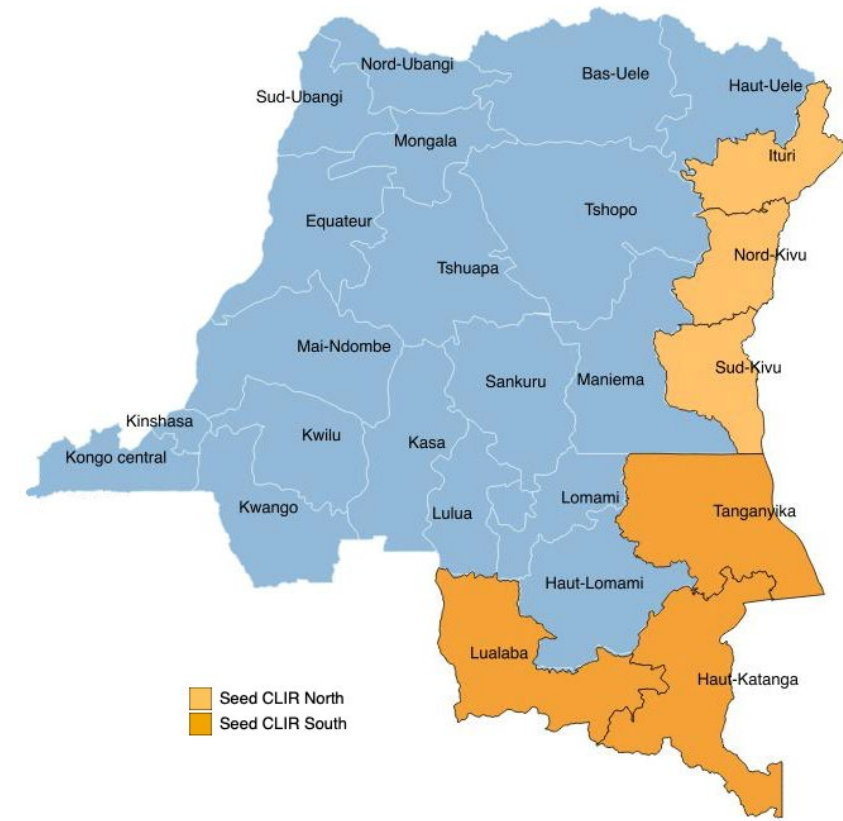
Dates: July 7-26, 2019

Targeted Area: Six provinces in eastern DRC: Haut Katanga, Lualaba, Tanganyika, South Kivu, North Kivu, and Ituri

Target crops: Maize, rice, cowpea, dry bean, soybean, potato, sweet potato, tomato, onion, and cabbage

Stakeholders Consulted: > 100 public and private sector stakeholders

Methodology: Seed Commercial, Legal, and Institutional Reform (SeedCLIR) diagnostic



Graphic: SeedCLIR DRC Assessment Team



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DRC SEEDCLIR RECOMMENDATIONS: A PHASED ROADMAP

- Guide to coordinated investment by government and development partners
- 15-year timeframe, divided into 3 phases
- Covers aspects of the legal framework, regulatory institutions, and market development strategies

SeedCLIR Recommendations	PHASE I		PHASE II					PHASE III							
	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Y11	Y12	Y13	Y14	Y15
NATIONAL AND PROVINCIAL SEED POLICY															
Work with AGRIPEL, producer associations, the local COPROSEMs, and other interested parties to advocate for legal changes necessary to grant SENASEM the official legal mandate of seed authority.															
Work with AGRIPEL, producer associations, the local COPROSEMs, and other interested parties to advocate for passage of the seed law.															
Advocate for consistent application of the import tax exemption for seed.															
Support the GDRC in the adoption of a national seed policy and strategy.															
Support a full review of the seed regulatory framework and procedures.															
Work with AGRIPEL, producer associations, the local COPROSEMs, and other interested parties to advocate for a Plant Breeders' Rights law, including provisions for the licensing of public varieties by INERA breeders.															
NATIONAL SEED AUTHORITY															
Facilitate knowledge-sharing to improve SENASEM management system and organizational structure.															
Develop an integrated seed information management system to manage all SENASEM functions.															
Build SENASEM's overall capacity to implement the management systems, staff training, facilities, and equipment needed to act as an effective national seed authority and accreditation body.															
Support the establishment of the Technical Commission for Admission to the Catalog and the official release and registration of new varieties in the national variety															



A BRIEF HISTORY OF THE DRC SEED SYSTEM

1980s: Eight government-owned seed farms established with support from UNDP, FAO, and World Bank

1991: *Donor investment suspended*

Late 1990s: Privatization of seed farms with a focus on production for commercialization

1997: *Mobutu overthrown; seed farms looted; donor assistance again suspended*

2000s: Multisectoral reconstruction programs begin, including seed components. Efforts begin to improve SENASEM capacity and re-equip seed research institutions

2010s: Despite ongoing violence, donor programs continue, including focus on varietal research and private sector seed production and marketing in less-affected southern provinces

Since 2016/7: *Uptick in violence, internal displacement, and emergence of a new Ebola outbreak in August 2018 hinder access to many areas in northern provinces of eastern DRC*



OVERVIEW OF KEY FINDINGS

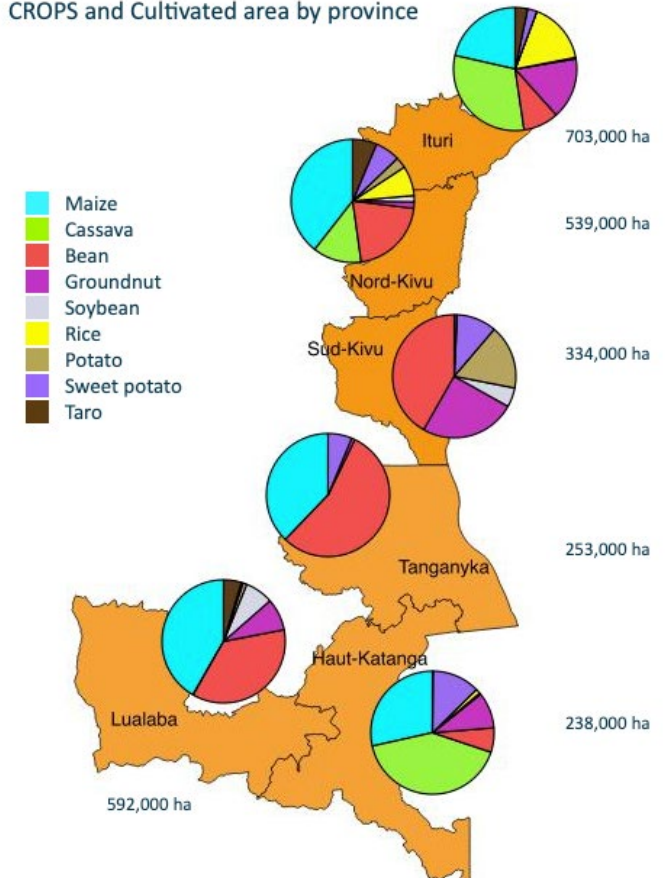
North (Tanganyika, South Kivu, North Kivu, and Ituri)

- Seed sector dominated by emergency seed relief programs
- Seed production largely via NGOs, few private producers

South (Haut Katanga and Lualaba)

- Nascent commercial seed sector
- Private seed producers' association
- Small amounts of informal seed export

CROPS and Cultivated area by province



Data source: DRC Ministry of Agriculture. Évaluation de la Campagne Agricole 2017-2018 et Bilan Alimentaire du Pays.

MARKET DEVELOPMENT IN FRAGILE CONTEXTS

Key Themes

- Limited commercial agriculture: key buyers include humanitarian aid tenders and government procurement
- Weak quality control undermines market signals and enables fake seed to enter the market
- Private seed sector investment limited beyond small-scale local production or vertically integrated production schemes
- Low private sector production and marketing skill
- Gaps in value chain: lack of “good varieties” for seed companies to multiply

MARKET DEVELOPMENT IN FRAGILE CONTEXTS

Recommendations

- **Conflict or immediate post-conflict areas:** Focus on donor coordination and investment consistent with private seed sector development
- **Areas with emergent commercial agriculture:** Focus private sector development efforts on bright spots of market potential

Short-Term

- Establish private sector-sensitive guidelines for seed tenders
- Introduce a code of conduct for NGOs and international organizations engaged in seed importation
- Look for bright spots of market potential: nascent commercial agriculture, private sector capacity; provide access to commercially desirable varieties

Medium-Term

- Increase coordination and knowledge-sharing among donor seed projects
- Support capacity building for local seed companies and seed producer groups
- Promote seed export opportunities by facilitating registration of Congolese varieties in regional variety catalogs

Long-Term

- Promote private sector investment in seed production for export

STRENGTHENING SEED REGULATORY INSTITUTIONS

Key Themes

Seed quality control and certification:

- Lack of technical and financial capacity to properly certify seed, combined with overreliance on the use of first reproduction certified seed (R1), weakens the quality of seed available in the market

Variety development and maintenance:

- Varietal identities poorly defined and variety catalog poorly managed
- Weak breeding and varietal maintenance programs and prevalence of large-scale institutional buyers limit varietal diversity
- Weak maintenance capacity leads to poor quality of early generation seed

STRENGTHENING SEED REGULATORY INSTITUTIONS

Recommendations

- **Seed quality control and certification:** Focus on core quality control functions at a level consistent with institutional capacity
- **Variety development and maintenance:** Leverage regional and private sector support for breeding, variety registration, and variety maintenance as public sector capacity develops

Short-Term

- Develop an integrated seed information management system and clear organizational structure for the NSA
- Promote the production of seed categories requiring less stringent quality control (e.g., QDS seed, emergency seed)
- Support private variety development and maintenance

Medium-Term

- Support establishment of a national variety release committee and variety catalog
- Strengthen NSA capacity in seed testing and, eventually, the accreditation of private laboratories

Long-Term

- Support capacity building in breeding and variety maintenance at INERA, particularly for crops with less commercial potential
- Support NSA capacity to apply procedures for the accreditation of third-party seed quality control services

NATIONAL AND PROVINCIAL SEED POLICY

Key Themes

- Lack of a clear legal and regulatory framework for the seed sector
- Lack of a clear mandate for institutions charged with regulating seed quality
- Different priorities exist at the national and provincial levels: National-level efforts focused on alignment with regional seed trade agreements and international best practice may have little practical relevance in fragile regions
- Weak public-private dialogue mechanisms at the national and provincial levels

NATIONAL AND PROVINCIAL SEED POLICY

Recommendations

- **Enable locally led action:**
Advocate for a clear mandate of the NSA and practical legal framework for seed consistent with local realities and supported by local dialogue
- **Gradual maturation of the regulatory framework:**
Support addition of more complex regulatory areas (e.g., PBR) only as capacity expands

Short-Term

- Work with the MoA, producer associations, local public-private dialogue mechanisms, and other interested parties to advocate for passage of a clear, practical legal framework for seed

Medium-Term

- Work with the MoA, producer associations, local public-private dialogue mechanisms, and other interested parties to advocate for a clear mandate for the National Seed Authority
- Support the adoption of a National Seed Policy consistent with the needs and realities of fragile areas

Long-Term

- Support a full review and gradual development of the regulatory framework over time in line with the capacity of seed institutions and needs of the private seed sector

Top Takeaways

1 Be realistic about the timeframe

Acknowledge the long-term nature of seed system development, particularly in fragile contexts, and plan early for coordination

2 Leverage regional support

Work with regional seed institutions, where possible, to alleviate the need to remedy all areas of seed regulation immediately

3 Focus on the bright spots

Find what's working, and build a strategy around existing assets (e.g., skilled seed inspectors, nascent commercial agriculture)

Q&A

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