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

REPORT ON FORMAL SEED SECTOR KEY INFORMANT INTERVIEWS IN THE DEMOCRATIC REPUBLIC OF CONGO

USAID FROM THE AMERICAN PEOPLE

Agri experience making every season count

CRS CATHOLIC RELIEF SERVICES

Activity Title:	Feed the Future Global Supporting Seed Systems for Development activity
Activity start date and end date:	Aug 24, 2018 – Aug 23, 2023
Cooperative agreement number:	7200AA18LE00004
Document title:	Report on Formal Seed Sector Key Informant Interviews in the Democratic Republic of Congo
Publication date:	September 2022
Citation:	Agri Experience. 2022. Report on Formal Seed Sector Key Informant Interviews in the Democratic Republic of the Congo. A Feed the Future Global Supporting Seed Systems for Development activity (S34D) report.
Authors:	Agri Experience
Sponsoring USAID office:	LOC Unit, Federal Center Plaza (SA-44)/M/CFO/CMP
Technical office:	USAID/RFS/CA
AOR name:	Daniel Thomson
Activity Goal:	Improved functioning of the high-impact integrated seed systems
Language of document:	English
Submitted on behalf of:	Catholic Relief Services
Submitted by:	Nikaj van Wees, Chief of Party S34D activity Catholic Relief Services 228 West Lexington Street, Baltimore, MD 21201 Nikaj.vanwees@crs.org

Acknowledgements

Agri Experience wishes to thank all respondents for taking time to shed light on the state of the formal seed sector in eastern DRC. The candour and passion with which they spoke show how committed this small cadre of seed men and women are to ensuring farmers are better served with quality seed.

Cover page photo credit: Aline O'Connor, Agri Experience 2022

DISCLAIMER

This report was made possible by the generous support from the American people through the U.S. Government's Feed the Future Initiative and the United States Agency for International Development through Cooperative Agreement 7200AA18LE00004. The contents are the responsibility of Catholic Relief Services and do not necessarily reflect the views of USAID or the United States Government.

Feed the Future Consortium Partners in the Feed the Future Global Supporting Seed Systems for Development activity:

Agri experience Making every season count

Alliance Bioversity International CIAT International Center for Tropical Agriculture Since 1967 Science to cultivate change

OPPORTUNITY International

PABRA Pan-Africa Bean Research Alliance Better Beans for Africa

List of Acronyms

AGRA	Alliance for a Green Revolution in Africa
AGMARK	Agricultural Market Development Trust
BHA	Bureau for Humanitarian Assistance
CIMMYT	International Maize and Wheat Improvement Centre
COMESA	Common Market for Eastern and Southern Africa
COPROSEM	Provincial Seed Council (Conseil Provincial Semencier)
CRS	Catholic Relief Service
DRC	Democratic Republic of the Congo
EGS	Early Generation Seed
FAO	Food and Agriculture Organization of the United Nations
FtF	Feed the Future
GDP	Gross Domestic Product
ICRC	International Committee for the Red Cross
ICRISAT	International Crops Research Institute for the Semi-Arid Tropics
INERA	National Institute for Agricultural Research and Studies
MLN	Maize Lethal Necrosis
MNC	Multinational Corporation
MT	Metric Tonnes
NARO	National Agricultural Research Organization
NGO	Non-Governmental Organization
OPV	Open-Pollinated Variety
PASA	Partners for Seed in Africa
QBS	QualiBasic Seed Company Limited
RAB	Rwanda Agriculture Board
S34D	Feed the Future Global Supporting Seed Systems for Development activity
SADC	Southern African Development Community
SeedCLIR	Seed, Commercial, Legal and Institutional Reform
SENASEM	National Seed Services (Service National des Semences)
TASAI	The African Seed Access Index
UKAID	United Kingdom Agency for International Development
USAID	United States Agency for International Development
VCU	Value for Cultivation and Use
WFP	World Food Program

Table of Contents

Introduction

This survey was commissioned by Supporting Seed Systems for Development activity (S34D) as part of the input into the Democratic Republic of Congo (DRC) case study of seed systems interventions in fragile states. This is part of a wider study that aims to support the emergence of enhanced and resilient seed sectors in fragile states including South Sudan, DRC and Haiti. The Fragile States Index which provides annual ranking of 178 countries using 12 indicators of risks and vulnerabilities experienced by those countries, ranks DRC as 5th on the index.

The Feed the Future Global Supporting Seed Systems for Development activity (S34D) is a five-year Leader with Associates Cooperative Agreement Award, funded by the Feed the Future Initiative through the Bureau of Resilience and Food Security (RFS) and by USAID through the Bureau for Humanitarian Assistance (BHA). Catholic Relief Services is leading this consortium with the support of a team of Consortium Partners which includes the Alliance for Bioversity International and CIAT (the Alliance), the Pan-Africa Bean Research Alliance (PABRA), Opportunity International (OI), and Agri Experience.

A core activity of S34D under the Emergency, Humanitarian Aid and Resilience (EHAR) is to support the emergence of enhanced and resilient seed sectors in fragile states. EHAR, through Agri Experience's facilitation, sought to understand the formal seed sector and processes, including its development and current status, with a special focus on eastern DRC. The findings will elucidate how current approaches to offering relief seed to farmers in eastern DRC affect the functioning and development of the formal seed sector in that region. The findings will also contribute to a synthesis report to elucidate lessons that have broader applicability.

Methodology

The methodology is based on desktop review of relevant literature focusing on formal seed sector interventions over the last ten years, mainly in eastern DRC (the full list of bibliography can be found in annex 1), and interviews with key informants who are actively involved with formal seed production or have supported the sector including overseeing funding to the sector.

We developed a list of likely key informants informed by literature and from our own interactions with formal seed stakeholders in eastern DRC. The key informants included participants from private seed companies and seed producers from eastern DRC, mainly North Kivu and South Kivu in addition to some from Haut-Katanga, who had been beneficiaries of or impacted by interventions aimed at strengthening the formal seed sector by two main donors: the Alliance for a Green Revolution in Africa's (AGRA) Partners for Seeds in Africa (PASA) program (funded by Howard G. Buffett from 2013 to 2016) and ELAN[1] RDC (funded by United Kingdom Agency for International Development – UKAID, from 2014 to 2018). Other key informants previously worked with programs and organizations that had been funded by ELAN RDC to specifically support interventions aimed at private seed sector strengthening in the DRC, such as The African Seed Access Index (TASAI). Both AGRA's PASA and ELAN RDC programs have ended. Since the support from the two main donors mentioned above also targeted private seed companies and producers in Haut-Katanga, we included a few seed companies from that region. That inclusion allowed us to appreciate some differences in the seed distribution structure of the Kivus and Haut-Katanga regions.

In total we interviewed 18 key informants, comprising 13 private seed companies and producers: seven from North Kivu, two from South Kivu, and four from Haut-Katanga (see map below). In addition, we interviewed one agrodealer based in North Kivu who imports seed for direct sale, so in this sense mimics a seed company. Four other respondents who had been involved with supporting the development of the formal seed sector were interviewed. Two were responsible for donor programs that directly funded seed policy enactment, strengthening of public seed sector entities, strengthening seed companies, and creating distribution channels. The other two respondents supported the seed industry in various capacities such as strengthening of the seed policy environment and supporting access to maize varieties and early

ELAN RDC was established in 2014 and operated until 2018, under the support of UKAID and implemented by Adam Smith International. ELAN established over 200 partnerships with private sector actors, including supported private seed companies increase seed production and seed sales, establish demonstration plots and trained 68,650 smallholder farmers on good agronomic practices.

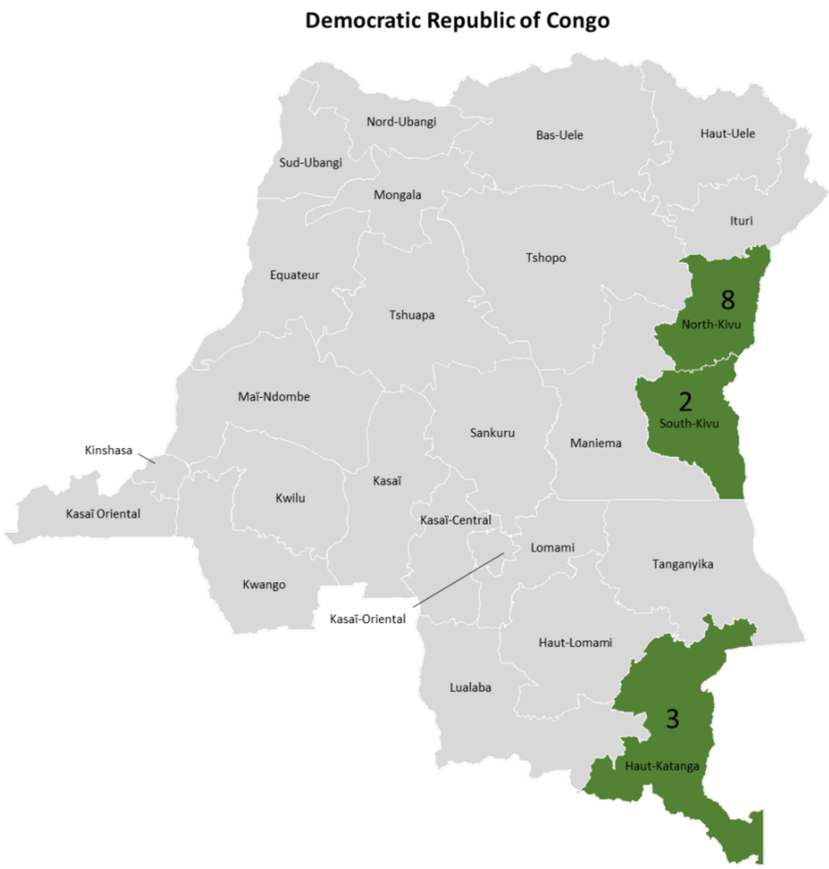
In 2017 through funding from ELAN RDC, TASAI carried out an assessment of the seed sector with a focus on maize, rice, beans and soybean. TASAI and ELAN RDC launched a second partnership that focused on the development and promotion of a seed sector strategy. During the same period 390 agrodealers were established and trained in Eastern and Southern DRC – almost double the 199 agrodealers recorded in 2016.

PARTNERS FOR SEED IN AFRICA (PASA), implemented by the Alliance for a Green Revolution in Africa with funding from the Howard G. Buffett Foundation, supported activities in DRC from 2012 to 2016 focusing on variety release, seed production and distribution and support to agrodealer capacity development. Fourteen new and improved varieties of maize (3), cassava (1) and both bush and climbing beans (10) were released in 2016. Support was given to establish two seed companies in North Kivu.

[1] Élan is French for 'impetus'.

generation seed (EGS) needs. Questionnaires used to gather data for seed companies and the agrodealer are attached in annexes 4 and 5 respectively.

While we specifically tried to target women seed company owners as key informants, very few were available and only two were interviewed, out of the three requests initially sent. The two interviewed were from Haut-Katanga and North Kivu.



General information

The DRC has a surface area of 2.345 million km² (235 million ha) and is the second largest country in sub-Saharan Africa, after Algeria. Eighty million hectares, or 30% of the country's landmass, is agricultural (arable), of which 4 to 7 million hectares are irrigable. Only 10% of the arable land is under cultivation (ELAN, 2019). Crop yields have either stagnated or declined for the most common crops such as maize, rice, beans and groundnuts. Groundnut yields, for example, were low at 0.8 MT/ha in 2008, and have declined to 0.6 MT/ha in 2017 (Seed Systems Group, 2021).

The country has a population of 99 million people and over 56 million people in farming households (60% of the population) who carry out subsistence farming, which accounts for 18% of the Gross Domestic Product (GDP). North and South Kivu combined have 12 million people (12% of the country's population). Due to decades of conflict, political upheaval, and instability, coupled with disease outbreaks, DRC ranks among the five poorest countries in the world. 73% of the population in 2018 lived on less than $1.90 a day, according to the World Bank.

<u>Haut-Katanga</u>

Haut-Katanga belongs to the southern provinces which were part of the former Katanga province before it was split into four smaller provinces in 2015. The main economic activity is mining, with the two provinces of Lualaba and Haut-Katanga accounting for 60% of global cobalt production, and 10% of copper production. There are a number of industrial-scale mining companies, some which supply seed to their employees and surrounding farming communities. The region experienced years of insurgency and insecurity and continues to see attacks from rebels trying to secede from the central government. The latest attack was reported in February 2022 in Lubumbashi.

Hybrid maize is the preferred crop; mining companies and government source seed from Zambia and South Africa, accounting for a high volume of imported seed, including hybrid maize seed.

<u>North Kivu</u>

North Kivu is agro-climatically diverse and has a very high population density. It borders Uganda and Rwanda and has long been the epicentre of conflict and displacement. In mid-2018, the province suffered from the second worst Ebola outbreak in history, which killed more than 1,500 people and made the cities of Beni and Butembo difficult to access.

Most of the relief agencies are based in North Kivu province. Seed is sold to international NGOs or to seed traders competing in seed tenders from international NGOs, donor projects, and United Nations agencies. The most common territories for relief seed include Rutshuru, Masisi, and Nyiragongo.

The most common crops planted are maize, cassava, beans, groundnuts, soybean, rice, potato, sweet potatoes and taro, covering 539,000 ha. The region produces 90% of beans in the DRC, about 260,000 MT/year. Early generation seed is sourced from Rwanda, Uganda, Burundi, and Kenya for potato, maize, and vegetable seed as well as from National Institute for Agricultural Research and Studies (INERA) - Mulungu and INERA contract growers.

By 2019, there were only two registered seed companies in the province (Job Seed and Plantation Anany), both of which were initially supported by AGRA (2016-2018) and focus primarily on hybrid maize.

South Kivu

South Kivu has struggled with insecurity since 1994. Chronic instability and violence have resulted in a seed market driven by emergency seed relief programs. The province is agro-climatically diverse and has high population density.

Common crops planted are beans, groundnuts, soybean, potato and sweet potatoes, covering 334,000 ha. Early generation potato, maize, and vegetable seed is sourced from South Kivu-based INERA-Mulungu Research Centre.

The seed market is dominated by large multi-year relief programs. Improved seed is produced by close to 50 producer organizations mostly linked to aid projects, including one seed company, numerous NGOs, cooperatives, and large landowners who produce seed with contract growers. The dominance of emergency seed relief programs in the seed market has limited the commercial viability of high-quality seed production models.

Approximately 93% of seed for the four main crops, i.e. maize, rice, beans and soybeans, is sourced from seed producers in this region and targets the relief market (TASAI, 2017). Seed is imported through both formal and informal mechanisms. There are no exports in the region due to the high domestic needs and ready humanitarian market which take up local production and draw steady seed flows into the DRC (SeedCLIR, 2019).

Findings of Key Informant Interviews

The interviews provided a rich set of information about the current state of the formal seed sector and, more importantly, how the multimillion relief seed market affects the functioning and development of the formal seed sector.

One notable development is that there is a slowly growing private seed sector spurred by the support given by AGRA's PASA program and ELAN RDC, four years after support to the sector by PASA and ELAN ended. As far as we could establish, no other funding targeting the entire seed system value chain has been provided in DRC. In Haut-Katanga, seed companies have maintained sales largely through agrodealers which were developed with support from PASA (TASAI, 2017), and these continue to account for most seed sales. Data provided by the respondents show that just over 40% of sales in Haut-Katanga were through either agrodealers or directly to farmers, although respondents mentioned that expansion is hampered by poor road infrastructure and the limited availability of varieties which farmers can select. Most seed companies in the region continue to grow and sell maize composites and are struggling to access hybrids.

In North Kivu and South Kivu, interventions by ELAN brought about the nascence of public-private seed sector linkages and discussions, which have been particularly strong in North Kivu due to the formation of the Provincial Seed Council – Conseil Provincial de Semences (COPROSEM), which has remained active. Unlike in 2013-2014 when donor interventions were just beginning, there now exists a young but growing private seed sector in eastern DRC, whose leaders understand the importance of marketing good quality seed for the long-term sustainability of the industry. The 2017 TASAI Country Report cited the existence of 11 seed companies in 2016, seven of them from North and South Kivu. All seven companies are still producing and selling seed and took part in this survey. This growing formal seed sector is evidenced by increased interactions of stakeholders from the public sector, private sector and humanitarian organizations which discuss prevalent issues in the seed sector, including advocating for the enactment of relevant laws and regulatory instruments. The Provincial Seed Councils in both North and South Kivu continue to meet to deliberate on issues affecting the sector. Further evidence of the growing seed sector is the development of a Seed Strategy for North and South Kivu and several meetings of stakeholders attended by public and private entities as well as relief agencies.

Notwithstanding the progress made to develop private seed companies, the same issues raised in the SeedCLIR (2019) and TASAI (2017) reports still prevail and growth within the formal seed sector is very slow. These include lack of an enacted seed law as the seed law is in draft form and its finalization was slowed due to:

- recent changes at the Ministry of Agriculture and low funding and weak capacity in the two public institutions directly supporting the seed sector, i.e. INERA and the National Seed Service (SENASEM)
- challenges with availability of early generation seed in terms of quality, volumes and timeliness
- poor road infrastructure affecting ability of sales to farmers through agrodealers networks
- limited number of varieties available for multiplication due to weak research capability and funding at INERA
- lack of credit facilities tailored for the seed sector which leads to inadequate infrastructure for seed processing and storage; distortion of the seed market by relief NGOS which offer free seed to farmers
- poor planning for tender requests by emergency relief NGOS
- availability of counterfeit seed driven by opportunists who take advantage of the huge relief seed market

An example of the new COPROSEM Flier

(See English translation in Annex 6)

CONSEIL PROVINCIAL

DES SEMENCES

COPROSEM NORD-KIVU

Nord-Kivu

Equipe de réalisation

Prof. Asanzi Christophe M.
Prof. Lucien Nyembo K.
Ir Alfred Mutundi N.
Mr. Mainza Mugoya

Contacts
+243 813 152 283 ; +243 997 771 536
E-mail : coprosemnk@gmail.com

Qu'est-ce que le COPROSEM ?

COPROSEM : Conseil Provincial des Semences

La production de semences nécessite beaucoup de soins et de compétence. En effet, pour produire des semences de bonne qualité, des procédures techniquesdoivent être respectées.

L'introduction de procédures de contrôle de qualité garantit une bonne qualité génétique et physiologique des semences pendant le processus de multiplication, les phases d'après récolte et de conservation, jusqu'au semis suivant.

La loi semencière de la RDC (en attente de promulgation) prévoit à son Titre II « De L'administration et de la gestion des activités semencières » ; en ses articles 06 et 08 :

Le rôle du COPROSEM : Conception, orientation et réalisation de la politique semencière

Son but : fournir des orientations à l'autorité provinciale sur la mise en œuvre de la loi et d'autres instruments de la politique du secteur semencier en RDC.

Le COPROSEM constitue un cadre d'échanges entre acteurs de la filière semencière sur les résolutions possibles d'amélioration du secteur semencier en province. Il favorise la convergence et le partage des valeurs entre les acteurs privés et publics du secteur semencier.

Sa vision : créer un environnement favorable permettant aux petits producteurs agricoles d'accéder à chaque saison à un large choix de semences améliorées et cetifiées de haute qualité en vue d'aboutir à une agriculture compétitive.

Objectifs du COPROSEM

- Saisir l'opportunité de l'harmonisation des politiques, règlements et lois semenciers au niveaux provincial, national entre les acteurs de l'industrie semencière au Nord Kivu.
- Défendre les intérêts économiques, techniques et sociaux des chercheurs, producteurs, agrodealers, utilisateurs de semences ;étudier et proposer aux pouvoirs publics toutes les mesures utiles intéressant la chaîne de valeur du secteursemencier.

Fonctions de COPROSEM

a. Orienter le ministère provincial de l'Agriculture dans la mise en œuvre de la loi et instruments de la politique semencière nationale au niveau provincial;
b. Développer et matérialiser les instruments de la politique du secteur semencierau niveau provincial;
c. En collaboration avec SENASEM, maintenir une liste actualisée des producteurs actifs de semences certifiées et des marchands semenciers/agrodealers dans le Nord-Kivu; Toutes les autres fonctions liées au secteur des semences au Nord-Kivu, telles que définies par les membres (offrir un espace de dialogue entre les acteurs du secteur semencier et la filière agricole);
d. Être un interlocuteur de référence pour les agriculteurs.

Qui sont les membres du COPROSEM ?

COPROSEM est institué par le gouverneur de province par son agrément conformément à l'Arrêté du Gouverneur de la province du Nord-Kivu.

Le COPROSEM Nord-Kivu est constitué de membres de la filière semencière. 40% proviennent des institutions étatiques et 60% du secteurprivé :

a. 1 membre de la recherche agricole (Institution publique et Universitaire)
b. 1 membre du contrôle et certification des semences (SENASEM)
c. 4 représentants des Etablissements semenciers
d. 2 représentants des marchands de smences/agrodealers
e. 1 membre du service de Quarantaine Animale et Végétale (SQAV)
f. 1 membre de service national de Vulgarisation (SNV)
g. 1 membre du Ministère provincial de l'Agriculture
h. 2 représentants des agriculteurs
i. 2 représentants d'ONG

Leadership du COPROSEM

La direction du COPROSEM se compose de :

a. 1 Président: Inspecteur provincial de l'Agriculture
b. 1er Vice-président: représentant des agriculteurs élu par les producteurs
c. 2e Vice-président: représentant des agriculteurs élu par les producteurs
d. 1 Secrétaire: Représentant de l'Institution de Recherche agricole (INERA)

Fonctions du Président de COPROSEM

a. Il joue un rôle protocolaire
b. Il préside les réunions du conseil
c. Il sert d'interface entre le Ministère et les autres membres du secteur semencier

Les fonctions du vice-président de COPROSEM

a. Il préside les réunions du conseil, en l'absence du président
b. Il engager et administree le COPROSEM
c. Il maintient conjointement avec SENASEM la base de données des producteurs de semences certifiées actifs dans la province

Collaboration entre les parties prenantes pour un secteur semencier innovant, performant et professionnalisé au service d'une agriculture compétitive en RDC

A general summary of the seed company and producer respondents' general information is given below.

<u>Crops and varieties sold</u>

Seed companies sold mainly maize[2], beans, soybean, sorghum, groundnut, rice, cassava cuttings and vegetable seed, as shown in Table 1 and Figure 1 below. The findings are consistent with literature citing low use of maize hybrids especially in North and South Kivu.

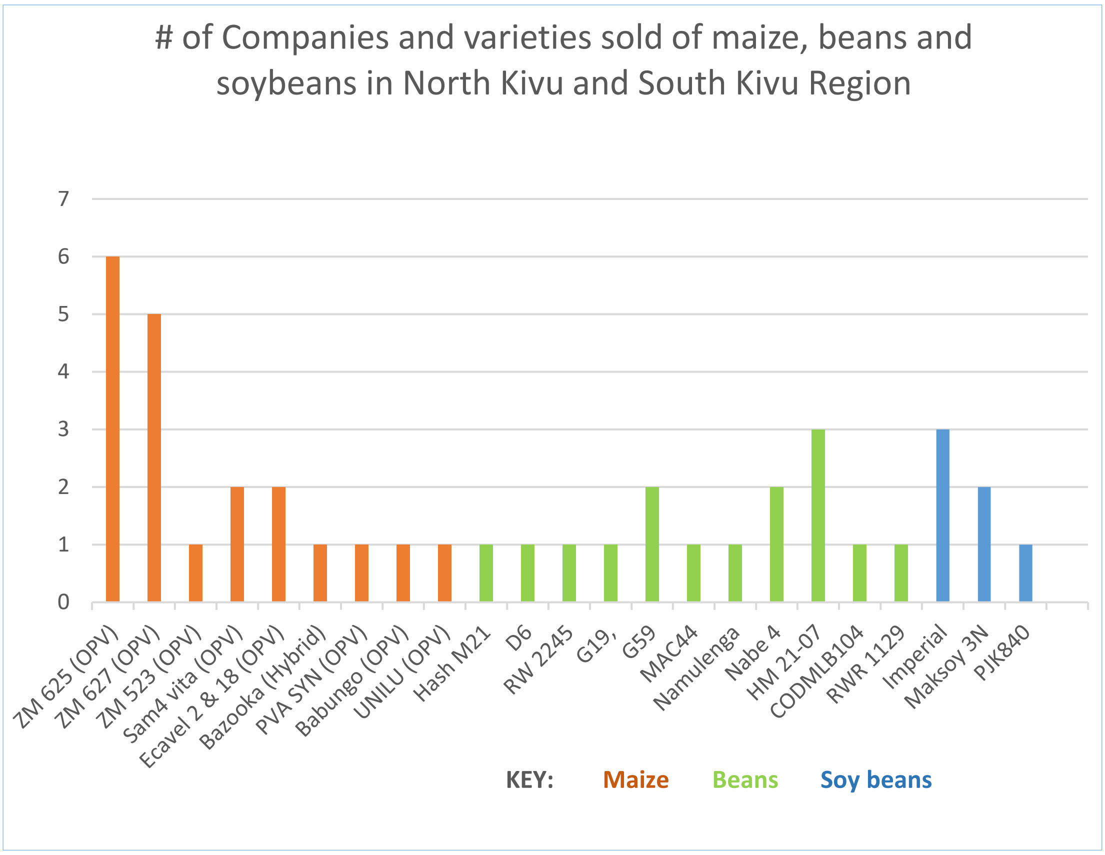
Table 1: Number of seed companies selling seed for each crop (n=14)

	Region	Maize	Beans	Soybean	Rice	Groundnuts	Sorghum	Cassava	Vegetables
# Of Companies	Haut-Katanga (3)	3	2	3	1	1	0	0	1
	North Kivu (9)	8 (1 AD*)	7	5	2	1	1	0	1 AD
	South Kivu (2)	2	2	2	0	0	0	1	0
Total		14	11	10	3	2	1	1	2

*AD: agrodealers

Source: Author's compilation from survey

Figure 1: Crops and varieties sold in North and South Kivu (n=14)



[2] Both OPV and hybrid varieties are sold, though sales are dominated by OPV varieties. Over 95% of respondents reported to sell OPV maize varieties.

Efforts have been made in recent years to obtain hybrids mainly from CIMMYT and nine hybrids from CIMMYT were licensed in the last three years to seed companies in the entire DRC with four of these licensed to companies in North Kivu. Maize varieties are generally old, for example Babungo and Unilu maize varieties sold in Haut-Katanga region are 32 and 20 years old respectively. Respondents asked for funding to be injected into research by INERA to help identify new and adapted varieties. One respondent sought to understand how the company could access maize hybrids from CIMMYT.

Access to EGS

Seed companies across the board cited challenges faced in obtaining parent materials for multiplication. They appreciated the fact that INERA tries to meet their EGS needs, but INERA is very constrained due to lack of funding and capacity among its technicians. Parent material for CIMMYT varieties, although given at no cost, is expensive to import for the following reasons: materials originate from CIMMYT-Harare (either as the source or are taken to Harare for quarantine if from areas where the maize lethal necrosis disease (MLN) is prevalent, such as East Africa) and have to be sent by courier to DRC; and the cost of courier per kg of seed ($10), plus cost of quarantine ($12) for materials originating outside Harare, plus import phytosanitary requirements add to the total cost of EGS. As shown in annex 3, seed companies have made successful attempts to obtain different varieties from neighboring countries, dominated by Zambia, Uganda, Rwanda and Kenya.

Seed companies' source of parent seed

The seed company respondents (n=13) reported that parent seed was obtained mainly from the public research institutes of INERA and University of Lubumbashi (50%), followed by CGIAR centres (25%), own seed company sources (12.5%), and imports from Uganda and Rwanda (12.5%).

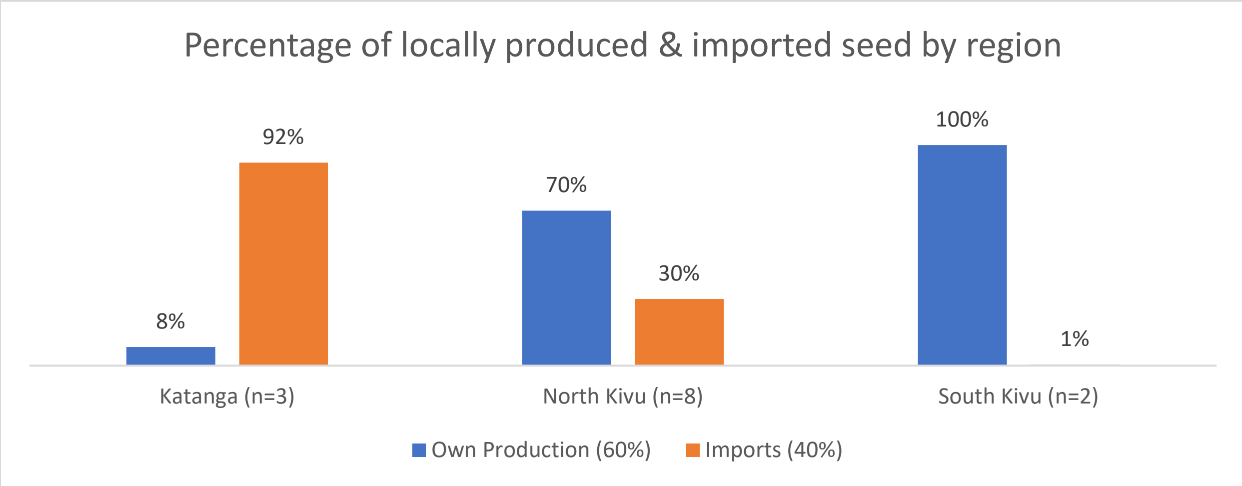
Respondents cited issues with poor quality, insufficient volumes of parent seed and at times complete lack of parent material requested, high cost of imported seed[3], and low funding to research institutions that could supply parent seed.

Local seed production and imports

The Kivus rely more on local seed production compared to Haut-Katanga which imports most of its maize seed from Zambia and South Africa, as can be seen in Figure 2 below.

[3] For example, it costs roughly $800-900 per kg for seed imports from Zimbabwe due to courier charges and other import-related payments.

Figure 2: Percentage of seed locally produced versus imported by seed companies from each region (n=13)



Source: Author's compilation from survey

Locally produced material accounted for 60% of all seed sold, while imports accounted for 40%. Both North and South Kivu regions depend mainly on locally produced seed, while Haut-Katanga accounted for a very high volume of imported seed, mostly maize hybrids from Zambia. This could be attributed to mining companies and government involvement in buying seed to distribute to farmers in the region. The government buys mainly maize hybrids from Zambia, which accounts for the large volumes of seed imports.

The seed volumes produced by seed companies are still very low as shown in Table 2 below. 46% of surveyed companies' total annual seed volumes fall between 21 - 50 MT, followed by 101-200 MT (23%) and 51-100 MT (15%). This is consistent with TASAI (2017) which stated that seed volumes in DRC are lower than in neighboring countries of Malawi, Uganda and Zambia, pointing to a fledgling seed sector.

Table 2: Size of company by average annual (n=13)

	< 20 MT	21 – 50 MT	51 – 100 MT	101 – 200 MT	>200
# Of seed companies	1	6	2	3	1

Source: Author's compilation from survey

Sales channels for seed

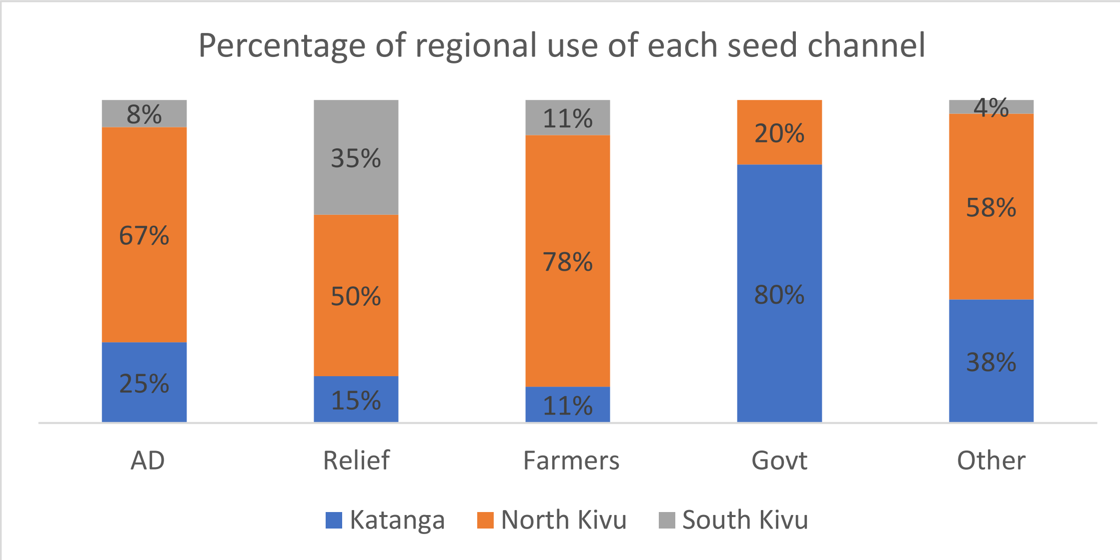
The various sales market segments and channels employed by the seed companies and producers are shown in Table 3 and Figure 3 below, respectively. Companies and producers in South Kivu sell predominantly through relief agencies. There are increasing sales through agrodealers, which account for 17% from respondents surveyed. Two respondents from Haut-Katanga and North Kivu said that they sold all their seed exclusively through agrodealers (see Table 3 on market segments). The agrodealer interviewed from North Kivu, however, sold 50% of seed directly to farmers, 30% to mining companies and 20% to relief agencies. Some seed companies described ‘other buyers’ as farmers or sellers who buy seed for onward sales to relief agencies, which would actually mean that the percentage that actually ends up in relief seed distribution could be higher.

Table 3: Market segments in Eastern DRC

Seed Market Segments in Six Provinces of Eastern DRC			
	Haut-Katanga	**Lualaba**	**Tanganyika, South Kivu, North Kivu, and Ituri**
Market Segments	100% direct sales to farmers	43% Ministry of Agriculture of Lualaba province 35% direct sales to farmers 16% local mining companies 5% milling company	80-100% relief agencies

Source: Prepared by the EEFS consultant team on the basis of official SENASEM and AGRIPEL data and information collected from stakeholders during field research - SeedCLIR, 2019

Figure 3: Percentage of regional use of each seed channel (n=13 seed companies)



Eighteen different relief agencies were named by the respondents as key buyers of seed for relief distribution in the three regions as shown in Table 4 below.

Table 4: Relief agencies buying seed from respondents

Relief agencies buying relief seed from seed companies in DRC (n=13)	
1. GIZ	10. UN COPPI
2. Catholic Relief Service	11. Virunga Foundation
3. Caritas	12. World Food Program
4. Norwegian Refugee Council	13. Italian Cooperation
5. World Relief	14. HarvestPlus
6. IOM	15. Concern
7. FAO	16. Premier D'Urgence
8. ICRC	17. World Vision
9. Action to Combat Hunger	18. SEPAK FIDA

Financial Stability for Seed Business

Most respondents rated their business as being moderately financially unstable, as outlined in Table 5, and gave the reasons listed below.

- SENASEM is now inspecting seed crop i.e., so fees are now required, making it more costly
- Unstable seed market
- Financial stability is limited, high cost of crop management

- Market is stable but has government interference through free distribution is causing distortion
- Not easy to sell seed
- Business financial sustainability is moderately unstable, sale of OPVs is unprofitable
- Climate change, FAW invasion, price fluctuation due NGO interference, poor credit terms with NGOs slows business
- High taxation which increases the cost of seed and commodities by 100%
- Seed is bought by cash although sometimes NASECO gives credit (Agrodealers comment)

Table 5: Level of financial stability of seed companies and agrodealers in DRC Congo (n=13)

	Highly Unstable	Moderately Unstable	Just OK	Somewhat Stable	Highly Stable
# Of seed companies	1	7 (1 agrodealer)	0	4	1

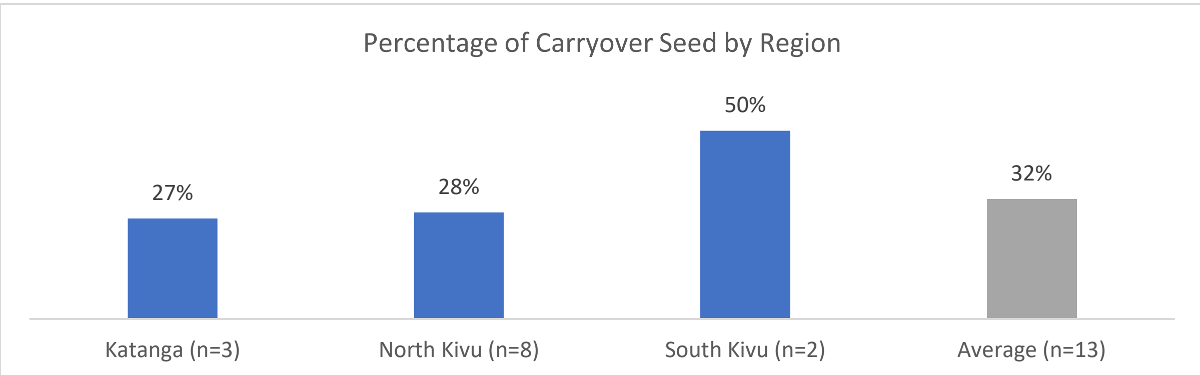
Source: Author's compilation from survey

There were no regional differences in the reasons given with the most common cited being costly production of seed due to high taxes, high price of parent seed and market interference by government and relief organizations.

On the upside, respondents said that good soils, favourable climate, and increased direct sales to farmers are driving some level of financial stability.

Seed companies struggle to sell seed, and most have an average of over 30% seed carried over every season as shown in Figure 4, especially of maize seed. Companies in South Kivu, which has most sales directly to relief agencies, accounted for most carry-over seed, probably due to the uncertainty around how much seed will be procured by relief agencies each season.

Figure 4: Percentage of seed carry-over into the next season by seed companies (n=13)



Source: Author's compilation from survey

Challenges Facing the Formal Seed Sector

The challenges facing the formal seed sector are listed below. Almost every person interviewed mentioned lack of a seed law, low capacity and underfunding of INERA and SENASEM, lack of access to agriculture-friendly credit, difficulty in accessing good varieties and EGS, and poorly managed relief seed distribution, as the top issues affecting the industry. The complete list follows. (n=13 seed companies and 1 agrodealer).

1. Financial challenges, including lack of credit and high taxation
2. Lack of the required seed legislation to govern the sector
3. An absence of supportive infrastructure such as seed processing plants, storage facilities etc. Country-level infrastructure like good roads is also a challenge
4. Support for the key government institutions responsible for research and seed certification (INERA, UNILU, SENASEM) is very low
5. Low capacity in seed production
6. Low farmer awareness on the importance of quality certified seed
7. Poor seed distribution channels
8. Relief seed distortion

Relief Seed Distribution

The reports by TASAI (2017) and SeedCLIR (2019) document challenges caused by the massive relief seed distribution, especially in South Kivu and North Kivu. According to TASAI, the relief market is a key market for main crop seed in DRC (see Table 6 below) and is dominated by several large humanitarian organizations and UN agencies. The challenge which was cited by many respondents is that purchase of seed is mostly done in a rush, which does not allow for sufficient time to grow and process the required volumes of seed. Data on actual volumes purchased for relief is hard to access hence it is difficult to triangulate data on the relief volumes with the seed produced and certified by SENASEM. Our survey showed that 55% of seed sold by seed companies and agro-dealers in South Kivu was sold to relief agencies. The volumes are much less for North Kivu (19%) and Haut-Katanga (15%). Within DRC, the Kivus account for most relief seed due to challenges of insecurity and other emergencies dominant in the region (TASAI, 2017).

Table 6: Seed sales to the relief market

Indicator	**Seed sales to relief market (MT)**				
	Maize	**Rice**	**Beans**	**Soya bean**	**Total**
Total sales to relief market (in tons)	406.4	172.3	239.8	101.3	919.8
Relief sales as % of total DRC seed sales (%)	22%	40%	72%	41%	

TASAI, 2017

Respondents acknowledged the importance relief seed plays in ensuring that farmers have seed to plant, especially in the Kivus which face frequent disasters including war, disease, and natural calamities. Some respondents in South Kivu said they appreciated the fact that relief seed does create a seed market, but that in cases where the relief agencies failed to buy seed there were huge carryovers of over 40%. However, the same level of seed carryover was witnessed in South Kivu, whether the relief agencies bought seed or not.

The challenge stems from poor planning for the multimillion dollar seed tenders which create a gap where there is insufficient seed to fulfill tender requirements. As a result, opportunists who are well connected fill that gap with grain, probably at the expense of genuine seed remaining unsold. While the nature of emergency relief requires immediate action, the relief sector in eastern DRC has spanned decades, hence there should be some level of preparation that avoids the random, last-minute calls for tenders that have negatively affected the formal seed sector.

Another issue is that relief agencies buy seed at the lowest price – on average $0.6 to 0.9 per kg as opposed to market price of $1.5 (TASAI, 2017) thus locking out serious seed companies. Relief agencies also buy on credit which compromises availability of working capital for seed producers, hence what is supplied to the agencies is mostly of very poor quality. According to one seed company, the resulting damage done to farmer adoption of certified seed is immense: "A farmer asks himself, if these wealthy organizations (NGOs) give this kind of (poor) quality seed, what quality would a mere seed company give?"

The relief agency approach of providing free seed without a focus on quality just to achieve large volumes supplied to farmers, coupled with lack of seed regulatory enforcement on the part of SENASEM, has led to a pathetic state of affairs where farmers become dependent on free seed for which quality is poor. This, in turn, disincentivises farmers from investing in better farming practices or inputs. In addition, well-connected rogue multipliers who do not have the technical expertise to produce good quality seed fill the volumes required for tenders with grain in the name of seed. Genuine seed companies are left in a situation where their business is very unstable financially, marketing seed is difficult, and most have 30-40% carryover of seed each season.

Another serious issue stemming from the relief seed market is that the agencies brand the seed with the NGO name rather than the variety and seed producer name. This eliminates brand awareness for seed companies, denying farmers the chance to experiment with and compare different brands. Brand awareness would also allow seed companies to compete based on criteria such as proper variety positioning, seed quality, packaging size, distribution capacity, pricing, and extension support to farmers.

There were proposals for relief agencies to use part of the funds to carry out some testing and promotional activities with farmers, such as experimenting with small packs, maintaining variety and brand names, and carrying out demos and field days to understand what farmers prefer for their locations, before placing orders with the seed producers. Surveys can be carried out to understand farmer preferences using mobile phones, to which practically all farmers have access.

The seed companies surveyed listed the following issues resulting from relief seed distribution.

Table 7: Full set of respondents' opinions about relief seed (n=14)

• Cause of unpredictable and unstable seed demand
• Some distribute fake seed to avoid paying high prices
• Prevalence of fake and low-quality seed as NGOs buy anything as seed (without checking for quality)
• Low quality seed, price distortion, misinformation on hybrids
• Distribution of free seed by NGOs affects our sales
• They do not support seed companies in seed marketing, only interested in buying seed
• NGOs dominate market (85%) making it difficult for private businesses
• Unreliable NGOs also give grain as seed. Example: an NGO bought 800MT of seed, was mixed up with grain
• NGOs selling too much seed, most of it is of low quality, discouraging farmers from trusting certified seed, delayed payments, do not brand seed with trade names
• Small seed companies do not get NGO tenders easily, late payment (credit)
• NGOs are not reliable

<u>What has worked well?</u>

Respondents acknowledged that there has been some growth in the seed sector in the last 3-4 years. This is notable for two reasons: some growth has happened, taking into account that COVID-19 has had a negative impact on every aspect of the economy including seed production; and there has been minimal donor support to the sector since 2019 after the departure of ELAN. Farmers are beginning to discern seed from grain and need good seed to achieve high yields to serve the strong commodity markets in neighbouring countries such as Uganda and Rwanda**.** More companies are accessing maize hybrids which farmers are demanding. There have also been efforts by private seed producers to engage with NGOs for better planning on their seed requirements. Respondents listed the items below as indicative of this positive change.

Table 8: Full set of respondent comments about what worked well within the seed sector (n = 14)

• Donor-funded support, e.g., AGRA, AGMARK, ELAN
• Seed companies are organizing themselves to trade with NGOs
• SeedCo is well accepted to trade in DRC
• Non-reliance on donors
• Enough seed produced for market

• Knowledge of seed multiplication, we carry out field demos
• We have ready customers for legumes
• NGOs have created demand for seed
• Farmers know seed from grain
• Commodity uptake in Rwanda and Uganda is high
• Seed producers organized under COPROSEM for self-regulation, 4 seed companies have CIMMYT hybrids, good COMESA SADC rules on germplasm import
• ZM (CIMMYT) varieties still popular, Congo Synergy Business Facilities (CSBF) plans to start producing locally
• Farmers want hybrids because they yield more

Respondents' Recommendations

Respondents had a lot to say about what needs to be done to ensure growth and sustainability of the formal seed sector. The recommendations cut across the three regions, with few exceptions. In Haut-Katanga, recommendations focused on reducing the level of taxation, promoting government support for increased investment in seed business infrastructure, and access to maize hybrids. In South Kivu, recommendations related to enacting seed laws, developing agrodealer networks, strengthening the private sector, and supporting seed marketing initiatives. In North Kivu, recommendations cited the need to enact seed laws, better regulate the sector, need for agricultural credit, support public research, and build capacity for both seed producers and the public sector. Below are the recommendations that were listed by the seed companies and agrodealer.

Table 9: Full set of respondents' recommendations (n=14)

• Decentralize SENASEM, fast track enactment of seed laws, strengthen seed traders' association
• Support companies to get basic seed, carry out marketing (e.g., demos), link to agrodealers, and receive training
• Need for good laws and regulations, harmonized taxation, and development of physical infrastructure
• Need to implement seed laws, act fairly with all stakeholders
• Define and implement seed policies, subsidize seed production, regulate seed sector at all levels, support local seed producers
• Give seed companies subsidies, support exchange programs for local seed producers and other countries, have relief NGOs support seed companies
• Acquisition of hybrid parental material
• Financial support to help expand seed business

• Need for seed policy
• Budget support for research
• Agricultural credit for seed producers
• Roll out input and equipment subsidy
• Need for agriculture credit facility
• Donor support for seed processing plants and other infrastructure
• Need for, and better application of, seed regulations and laws
• Reforms in INERA
• Capacity building for SENASEM
• Relief NGOs should source seed from genuine seed producers only
• Reduce taxation, enact and implement seed laws, build physical infrastructure
• Increased visits from SENASEM for seed regulatory work to ensure that only quality seed is sold, and stop sale of poor quality seed

Conclusions

General

This study shines light on the presence of a small and nascent, yet very committed, cadre of private sector seed suppliers in DRC. These companies currently struggle for survival and growth as they encounter a lack of functional seed laws and regulations, high importation costs for parent seed, unstable markets due to the actions of relief seed players, and the prevalence of fake and low-quality seed. The early support from both AGRA's PASA and the ELAN RDC programs was critical to the establishment of this nascent group. AGRA is currently learning that the support for its first group of seed companies across sub-Saharan Africa later led to additional national companies crowding into the sector and other meaningful spill-over effects. Given this pattern, these early signs of private seed supply hope in DRC are very important to sustain and nurture. However, these hopeful signs are threatened by the presence of a long-established (and thus somewhat erroneously named) "emergency" relief seed sector – particularly one with opaque tendering processes and non-branded seed.

The large percentage of seed that is sold to NGOs, ranging from 72% to 22% depending upon the crop, is a double-edged sword. It contributes to farmer awareness of seed of new varieties and, at times, the benefits of seed that is produced to meet quality standards. It also provides uptake for commercial seed producers. However, it simultaneously works against direct private sector sales to farmers, creates unstable markets, and also provides abundant opportunity and cover for fake and low-quality seed in the market. This is an opportune time to take serious action to support the fledgling formal seed sector and establish long-term sustainable seed supply.

Enlightened and sustainable system-oriented relief seed players

Relief NGOs can play a greater supportive role for the sector by investing in long term self-sustaining solutions including supporting seed companies and researchers to collaborate with farmers on variety preference and awareness and using branded seed to enable farmers to recognize quality differences among seed producers. Relief agencies can also work with producers and SENASEM to better plan for their seed requirements, support quality assurance activities, and reject any seed that is questionable.

Supplying low quality or counterfeit seed is as bad, or maybe even worse, than supplying no seed at all because it leads farmers to distrust any commercial seed. Relief agencies report results in terms of seed volumes distributed while ignoring important factors that measure quality and resulting yields for farmers. NGOs using the current myopic metrics of "low seed purchase price" and "large volumes distributed" fail to consider the damage done through farmers not planting genuine, good quality seed.

Government capacity

The gap left by government's inability to regulate the sector is evident. However, there is a recognition by both the public and private sectors of the importance of having professional seed producers, marketers and distributors in a well-regulated sector. The early initiatives started by AGRA and ELAN appear to have taken root. This could be attributed to the holistic approach employed to address the entire seed system, including policy, legal and regulatory issues, research, certified seed production, quality assurance, and seed distribution including strengthening market distribution channels. Public sector efforts at regulation are, however, lagging the early private sector results and should be strengthened.

Development partner focus

It would be good to see more donor support given to the sector in a holistic manner to spur sustainable development of a vibrant commercial seed sector. The ready commodity markets in neighbouring countries and good rainfall offer positive momentum that can help to sustain seed sector growth. With the current invasion of Ukraine by Russia, countries in Africa will be looking to meet their grain needs from within the continent. Good markets lead farmers to invest in good seed and inputs if they are available. There is increasing evidence in DRC of seed companies beginning to seek better varieties including maize hybrids and other crop varieties from neighbouring countries, farmers beginning to appreciate the value of true good quality seed, and increased usage of distribution channels that seek to reach farmers directly such as agrodealers.

For the well-being of DRC's 10 million farmers, there must be a clear development partner commitment to abandoning DRC's long term "emergency" relief seed market as the best available option. Development partners need to take a leading position in driving the transition from the current nascent, but very high potential, private sector-driven seed supply system to a more sustainable and farmer-responsive system anchored in private sector investment and growth.

Annex 1: Bibliography

Asanzi, C. (2019*). Feasibility Study for the Development of Public-Private Seed Delivery System in DR Congo*. Seed Systems Group.

Asanzi, C., et al. (2011). *Provincial Seed Council (COPROSEM) North Kivu*.

Asanzi, C., et al. (2017). *Country Report Democratic Republic of the Congo.* TASAI.

Bastiaan, H., et al. (2019). *A Quarter-Billion Dollar Industry? The DRC Seed Sector*. ELAN RDC.

Bastiaan, H., et al. (2021). *A, B, Seeds: The Fund Fundamentals of Seed Sector Development in DRC.* ELAN RDC.

Bukasa, K. (2010). *Basic Study of the Seed Sector In DRC, in Keeping with Regional Harmonization Seed Legislation*. AFSTA.

CIAT, UEA, CRS, & Caritas. (2012). *Seed System Security Assessment, Northern Haut-Katanga (Kalemia and Nyunzu Territories), Democratic Republic of Congo.*

ELAN RDC. (2021). *Seed Investment in DRC.*

Feed the Future Enabling Environment for Food Security Project. (2019). *SeedCLIR: Democratic Republic of Congo*. USAID.

Gethi, J. & Siamachira J. (2015). *New Seed Initiative for Maize in Africa (NSIMA) End of Project Meeting Proceedings*. NSIMA.

https://fragilestatesindex.org/ (2022).

Mabaya, E., et al. (2017). *Democratic Republic of the Congo Brief*. TASAI.

Ministry of Agriculture. (2017). *Law Proposition Relating to Seed Activity in the Democratic Republic of Congo*. Member of the DRC Senate.

Njingulula, P., et al. (2014). *Strengthening Local Seed systems within the Bean Value Chain: Experience of Agricultural Innovation Platforms in the Democratic Republic of Congo.*

Seed Systems Group. (2021). *Strategy for the Development of Sustainable Seed Supply in the Democratic Republic of Congo*. Seed Systems Group.

The African Seed Access Index. (2018*). Seed Sector Strategy for Eastern region (North and South Kivu Provinces) Democratic Republic of the Congo.*

Annex 2: List of Key Informants

#	Name	Organization	Gender	Email	Type of Entity	Location	Interview Date
1		Agri Reference Ent. (AGRI-REF)	Male		Private local seed company	North Kivu	27/05/2022
2		SeedCo Ltd	Male		African multinational seed company	Haut-Katanga	31/05/2022
3		Agri Force	Male		Private local seed company	South Kivu	02/06/2022
4		TL Africa	Male		Private local seed trader	South Kivu	02/06/2022
5		Plantation Anany	Male		Private local seed company	North Kivu	02/06/2022
6		Mimosa Seed	Female		Private local seed company	Haut-Katanga	02/06/2022
7		Baraka Seed	Male		Private local seed company	North Kivu	02/06/2022
8		Etablissement Semence Kimana	Male		Private local seed company	North Kivu	08/06/2022
9		Ferme Bon Berger	Male		Private local seed company	Haut-Katanga	09/06/2022
10		NASECO Seeds	Male		Regional seed company	North Kivu	07/06/2022
11		Etablissement Job Seed	Male		Private local seed company	North Kivu	23/06/2022
12		Etablissement Buhendwa	Female		Private local seed company	North Kivu	24/06/2022

#	Name	Organization	Gender	Email	Type of Entity	Location	Interview Date
13		Congo Synergy Business Facilities (CSBF)	Male		Private local seed company	Haut-Katanga	16/06/2022
14		Akipha Agrodealer	Male		Agrodealer	North Kivu	19/06/2022
15		The African Seed Access Index	Male		Research organization	Uganda	27/05/2022
16		International Maize and Wheat Improvement Center	Male		International public research	Zimbabwe	09/06/2022
17		Former RDC ELAN	Male		Donor	Nairobi	16/06/2022
18		Seed Systems Group (former AGRA)	Male		Donor	Nairobi	19/06/2022

Annex 3: List of crop varieties sold by respondents

Regions	Crops	Varieties	# Of Companies selling
S. Kivu & N. Kivu	1. Maize	ZM 625 (OPV)	6
		ZM 627 (OPV)	5
		ZM 523 (OPV)	1
		Sam4vita (OPV)	2
		Ecavel 2 & 18 (OPV)	2
		Bazooka (Hybrid)	1
		PVA SYN (OPV)	1
		Babungo (OPV)	1
		UNILU (OPV)	1
	2. Beans	Hash M21	1
		D6	1
		RW 2245	1
		G19	1
		G59	2
		MAC44	1
		Namulenga	1
		NABE4	2
		HM 21-07	3
		CODMLB104	1
		RWR 1129	1
	3. Soybeans	Imperial	3
		Maksoy 3N	2
		PJK840	1
	4. Rice		1
	5. Vegetables		1
	6. Sorghum		1
	7.Groundnuts		1
Haut-Katanga	1. Maize	SC 403 (Hybrid)	1
		Babungo (OPV)	1
		UNILU (OPV)	1
		ZM 720 (OPV)	1
		ZM 721 (OPV)	1
		ZM 702 (OPV)	1
		ZM 638 (OPV)	1
		ZM 606 (OPV)	1
		ZM 620 (OPV)	1
		ZM 616 (OPV)	1
		ZM 520 (80%) (OPV)	1
	2. Beans	D6	1
	3. Soybeans	SC Safari	1
		TGX	1
		Kalea	1
		Lukanga	1
	4. Rice	Nerica7	1

Regions	Crops	Varieties	# Of Companies selling
	5.Groundnuts	MGV4	1
	6. Vegetables		1

Source: Author's compilation from survey

Annex 4: Seed Company Questionnaire

Dear Seed Company Leader,

Thank you for accepting to participate in this short survey that will help us understand the formal seed sector structures and processes, including its development and current status in the Democratic Republic of Congo. Please answer the questions below very accurately. All responses will be kept strictly confidential.

Company name	
Location	
Type of company (Public, local, regional, MNC)	
Gender of owner	
Year of establishment or operations in DRC	
Your name	

Your current business

1. For which crops do you sell seed (please include variety name of the crop)?

____

2. How old are these varieties – please include approximate age of each variety sold

3. Where do you get the parent seed which you multiply?

____

4. Have you ever experienced challenges in acquiring parent seed? Yes_______ No ________
   If yes, please explain____

5. What percentage of your seed is produced by yourself in DRC/is imported (Please ensure percentages add to 100%)?

	% Of total sales (MT)
% Of certified seed of own production in DRC	
% Of certified seed imported	
	100%

6. What is your average annual sales tonnage? (Select one box)

Select one box	**< 20 MT**	**21-50 MT**	**51-100 MT**	**101-200 MT**	**>200 MT**

7. What percentage of your annual sales is in the following categories (Please ensure percentages add to 100%)?

	Description	**% Of total sales (MT)**
1	% of sales (MT) sold to government or other public institutions	
2	% of sales (MT) sold through agrodealer or other retail channels	
3	% of sales (MT) sold to relief agencies	
4	% of sales (MT) sold directly to farmers	
5	% of sales (MT) sold to institutional buyers Please specify who or what type of institutional buyers	

	____	
	Total	100%

8. If sold to relief agencies, what are the names of the organizations?
____
____

9. How do you feel about the financial sustainability of your business in DRC, on a scale of 1 (low) to 5 (high)?
Select one box below.

1. Highly unstable	**2.Moderately unstable**	**3. Just OK**	**4. Somewhat stable**	**5. Highly stable**

10. What are the factors that help or hinder financial sustainability, and how have these changed over the years you have been in operation?
____
____

11. Are you receiving any support from donors to support your business? If yes, which donors and in which areas of your business are they supporting you?
____
____

12. Are you aware of interventions to support private seed companies? If yes, what are they?
____

13. How easy is it for you to sell your seed?

1. Not easy	**2. Somewhat easy**	**3. OK**	**4. Pretty easy**	**5. Very easy**

14. Do you normally have carry-over seed? Yes____________ No ______________
If yes, approximately what percentage of production each season do you carry over?
____

15. A. What in your opinion are the top five (5) challenges facing the seed industry in DRC?

B. Please explain why these are the top challenges and how they affect your company
____
____

16. A. What has worked well?
____
____

B. Please state why or how this has worked well and provide examples
____
____

17. A. What has <u>not</u> worked well?
____
____

B. Please state why or how this has <u>not</u> worked well and provide examples

18. What is your opinion on relief agencies distributing relief seed to farmers? In what ways is it beneficial to your business, and / or what challenges does it pose to your business?

19. What are the top three changes required to allow the seed industry to develop in DRC?

Please explain why you are prioritizing the above three

THANK YOU VERY MUCH FOR YOUR RESPONSES.

Annex 5: Agrodealer Questionnaire

Dear Agrodealer,

This is a short survey that we will use to inform government and donor work on seed sector development in DRC.

Please answer the questions below very accurately. If you prefer to keep your company and name anonymous, you can choose to do so. All responses will be kept strictly confidential.

Name of Shop (optional)	
Region	
Male of female owned	
Year of establishment	
Type of shop (Agent, retailer, or both)	
Your name (optional)	

1. For which crops do you sell seed?

____

____

_

2. What percentage of your seed sold is in the following categories (Please ensure percentages add to 100%)?

	% of total sales (MT)
% of vegetables seed	
% of crop seed	
	100%

3. What percentage of your seed is in the following categories (Please ensure percentages add to 100%)?

	% of total sales (MT)
% of certified seed bought from regional/MNC seed companies	
% of certified seed bought from local seed companies	
% of certified seed imported across the border	
	100%

4. If imported, for which crops and from which countries

Crop	**Country**

5. What is your average annual sales tonnage? (Select one box)

Select one box	1.< 1 MT	2. 2-5 MT	3. 5-7 MT	4. 7-10 MT	5. >10 MT

6. What percentage of your annual sales is in the following categories (Please ensure percentages add to 100%)?

	% of total sales (MT)
% of sales (mt) sold to government or other public institutions	
% of sales (mt) sold to relief agencies	
% of sales (mt) sold to mining companies	
% of sales (mt) sold directly to farmers	
	100%

7. If you sold to relief agencies, what are the name of the organizations?

____

____

8. How do you purchase your seeds?

Select one box	**1. Cash**	**2. Cash + Credit**	**3. Credit**	**4. Embedded Charges**	**5. Other**

9. What kind of support services do you provide to your customers? **Tick all that apply**

Select one box	**1. Information**	**2. Credit**	**3. Demos & Field days**	**4.After sales services**

10. How many customers (farmers) do you serve annually? ___________________________

11. What percentage of your customers is in the following categories (Please ensure percentages add to 100%)?

	% of total sales (MT)
Male	
Female	
	100%

12. How do you feel about the financial sustainability of your business, on a scale of 1 (low) to 5(high)? **Select one box below.**

1. Highly unstable	**2.Moderately unstable**	**3. Just OK**	**4. Somewhat stable**	**5. Highly stable**

13. Are you receiving any support from donors to support your business? If yes, which donors and in which areas of your business are they supporting

14. Generally, what types of complaint do you receive about seeds from farmers (e.g., poor germination, broken seed, rotten seed, price, fake seed)?

15. Do have to register your business with SENASEM? Y__________ N ______________

16. How often does SENASEM inspect your shop?

1. Never	2.Once a year	3. Twice a year	4. Thrice a year

17. What is your opinion on NGO's distributing relief seed? What challenges does it pose to your business and the seed sector at large?

Annex 6: COPROSEM Flier English Translation

PROVINCIAL SEED COUNCIL **COPROSEM NORTH-KIVU** North Kivu **Production team** Prof. Asanzi Christophe M. Prof. Lucien Nyembo K. Ir Alfred Mutundi N. Mr. Mainza Mugoya **Contacts** +243 813 152 283; +243 997 771 536 Email: coprosemnk@gmail.com	**What is COPROSEM?** COPROSEM: Provincial Seed Council Seed production requires a lot of care and skill. To produce good quality seeds, technical procedures must be followed. The introduction of quality control procedures ensures good genetic and physiological quality of seeds during the propagation process, post-harvest and conservation phrases, until the next seedling. The DRC Seed Law (pending promulgation) provides in Title II "The administration and management of seed activities"; in Articles 06 and 08: **The role of COPROSEM:** Design, orientation and implementation of seed policy **Its purpose** is to provide guidance to the provincial authority on the implementation of the law and other instruments of seed sector policy in the DRC.	The COPROSEM is a framework for exchanges between players in the seed industry on possible resolutions to improve the seed sector in the provinces. It promotes convergence and sharing of values between private and public actors in the seed sector. **Its vision** is to create a favourable environment for small-scale agricultural producers to have access to a wide range of high-quality, improved and certified seeds in each season in order to achieve competitive agriculture. **Objectives of the COPROSEM** ● Seize the opportunity to harmonize seed policies, regulations and laws at the provincial, national level among the players in the seed industry in North Kivu. ● To defend the economic, technical and social interests of researchers, producers, agro dealers and seed users; to study and propose to the public authorities all useful measures concerning the value chain of the seed sector.

Functions of COPROSEM a. To guide the provincial Ministry of Agriculture in the implementation of national seed legislation and policy instruments at the provincial level; b. Develop and materialize seed sector policy instruments at the provincial level; c. In collaboration with SENASEM, maintain an updated list of active certified seed producers and seed/agro dealer dealers in North Kivu; All other functions related to the seed sector in North Kivu as defined by members (provide a space for dialogue between seed sector actors and the agricultural sector); d. Be a point of reference for farmers.	a. 1 member of agricultural research (Public and University Institutions) b. 1 Seed Control and Certification Member (SENASEM) c. 4 representatives of Seed Establishments d. 2 representatives of seed dealers/agro dealers e. 1 member of the Animal and Plant Quarantine Service (SQAV) f. 1 member of the National Extension Service (SNV) g. 1 member of the Provincial Ministry of Agriculture h. 2 farmer representatives i. 2 representatives of NGO **COPROSEM Leadership**	Functions of the President of COPROSEM a. It plays a ceremonial role b. Chairs Board meetings c. It serves as an interface between the Department and other members of the seed sector The duties of the Vice-President of COPROSEM a. Chairs Board meetings in the absence of the Chair b. Engage and administer COPROSEM c. Maintains with SENASEM the database of certified seed producers active in the province *Collaboration between stakeholders for an innovative, efficient and professionalized*

Who are the members of COPROSEM? COPROSEM is instituted by the Provincial Governor by its approval in accordance with the Order of the Governor of the North Kivu Province. The COPROSEM Nord-Kivu is made up of members of the seed industry. 40% come from state institutions and 60% from the private sector:	The management of the COPROSEM consists of: a. 1 Chair: Provincial Agriculture Inspector b. 1st Vice-Chair: farmer representative elected by producers c. 2nd Vice-Chair: farmer representative elected by producers d. 1 Secretary: Representative of the Agricultural Research Institution (INERA)	*seed sector for competitive agriculture in the DRC*