

SeedNL Quick scan

Dutch public investments in the seed sector

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May, 2023



Outline

- Seed sector development
- SeedNL Quick investment scan
- Countries: variations & pathways
- Lessons learned

Seed Sector Development



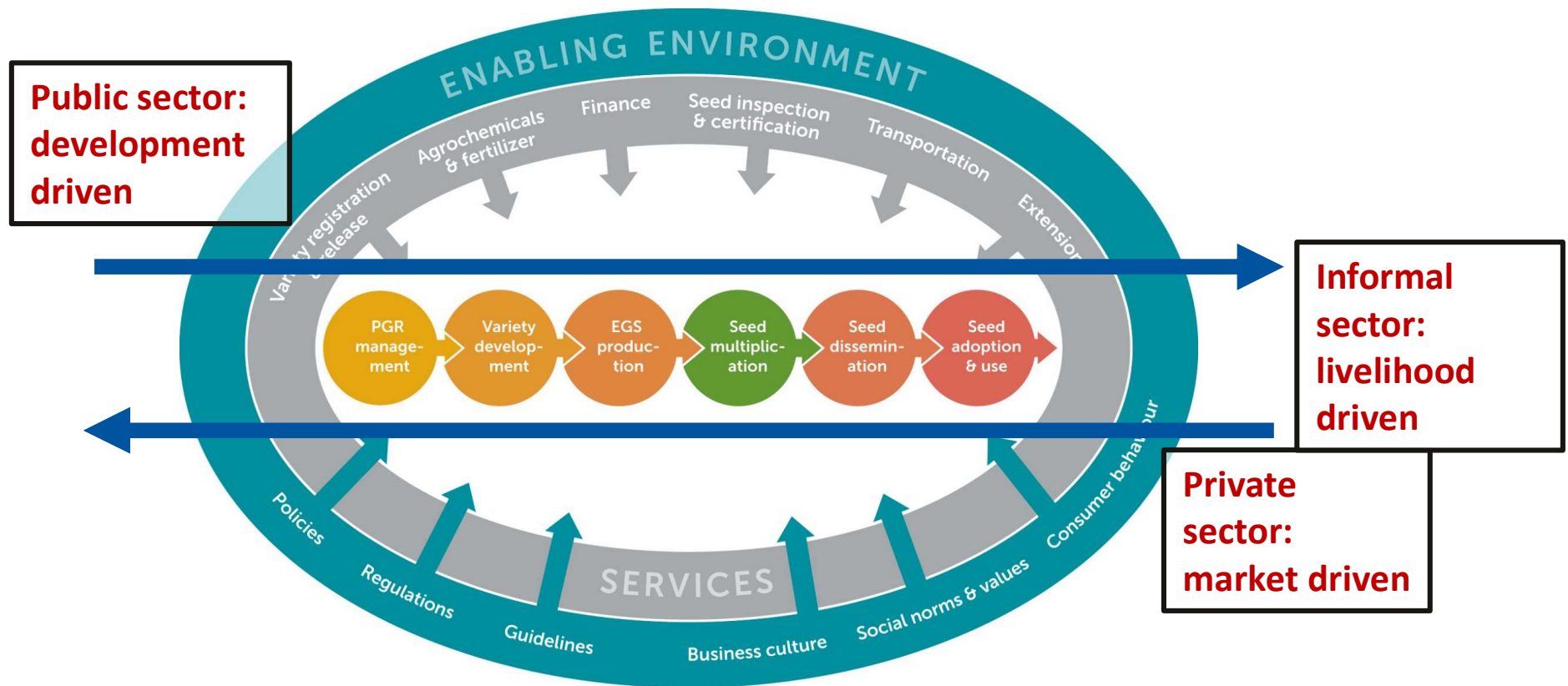
The seed sector is complex

Seed needs to be:

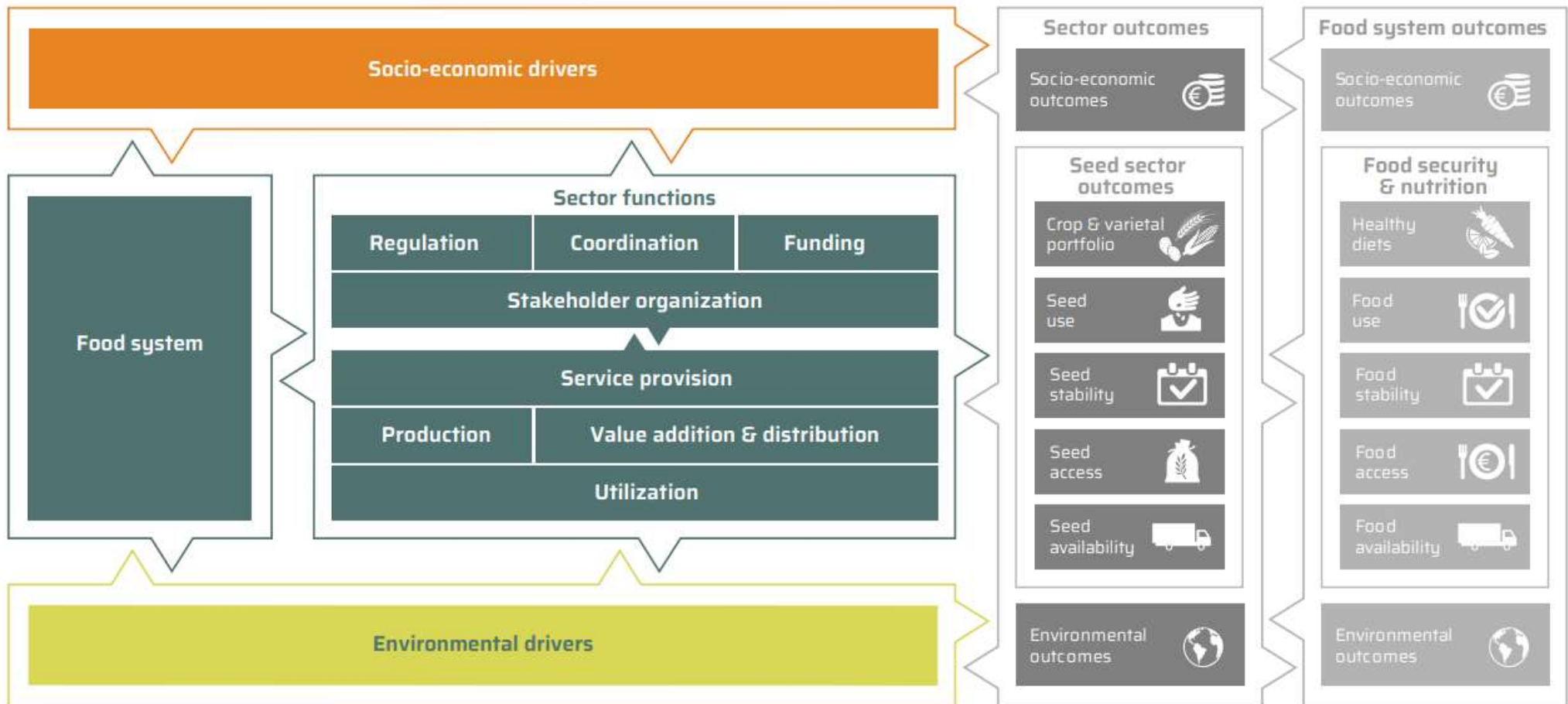
- available in sufficient quantity
- in appropriate quality
- at the right place
- at the right time
- at an affordable price
- of a variety well suited to the local agro-ecological conditions
- matching with farmer/market demands



Complementary roles of public & private sector, formal & informal systems



Food system and seed sector transformation



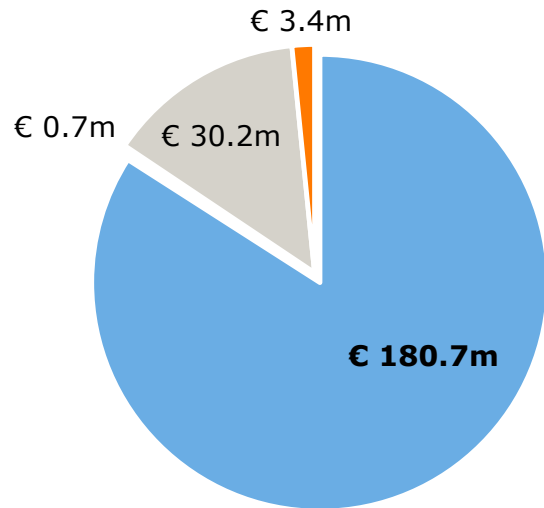
SeedNL Quick scan – Dutch investments in Seed Sector Development in the Global South

Dutch foreign policy & development cooperation

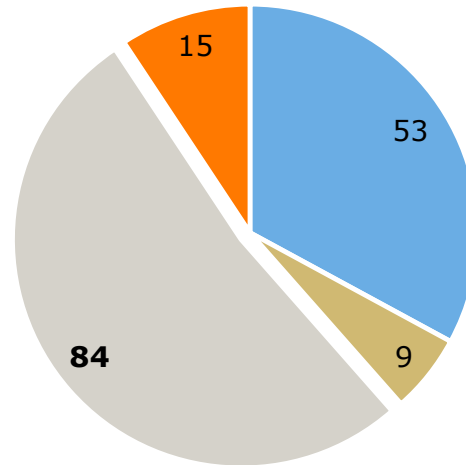
- Food security, sustainable agriculture, and water management
- Private sector development
- Emergency aid and humanitarian diplomacy
- Education

Investments (2018-2022)

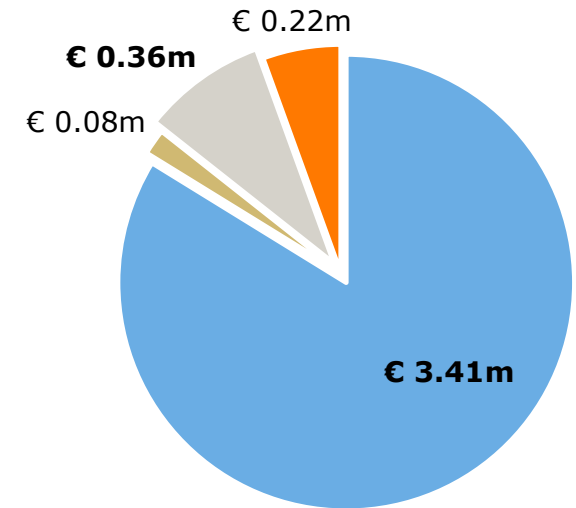
Total:
€ 214m (€ 180m DGIS)



Grants (#):
½ projects awarded by RVO



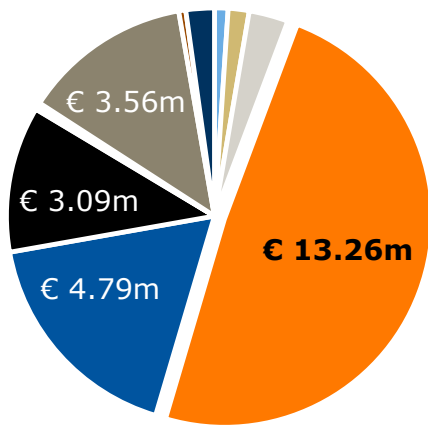
Ave. size:
DGIS 10x RVO



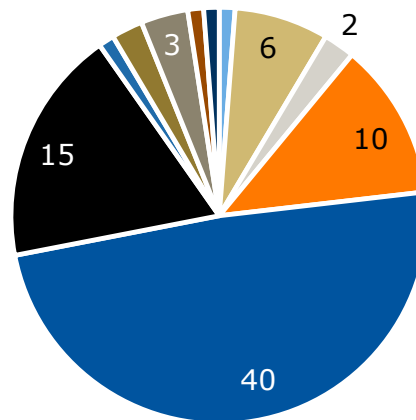
■ DGIS ■ LNV ■ RVO ■ Nuffic

Instruments (RVO)

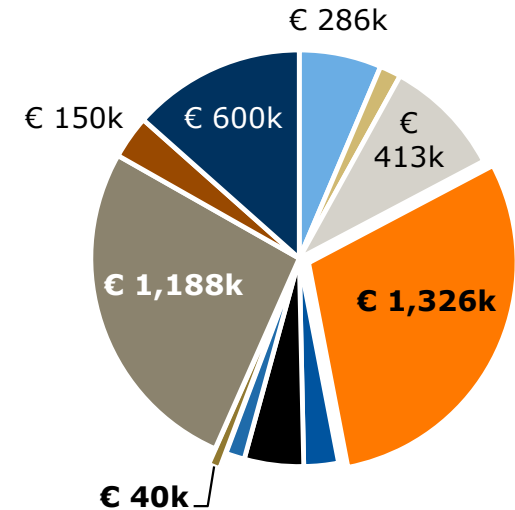
Total:
62% FDOV/SDGP



Grants (#):
49% PSD toolkit



Ave. size:
€ 40k (SBIR) - € 1.3m (FDOV/SDGP)



■ DGGF
■ PVW

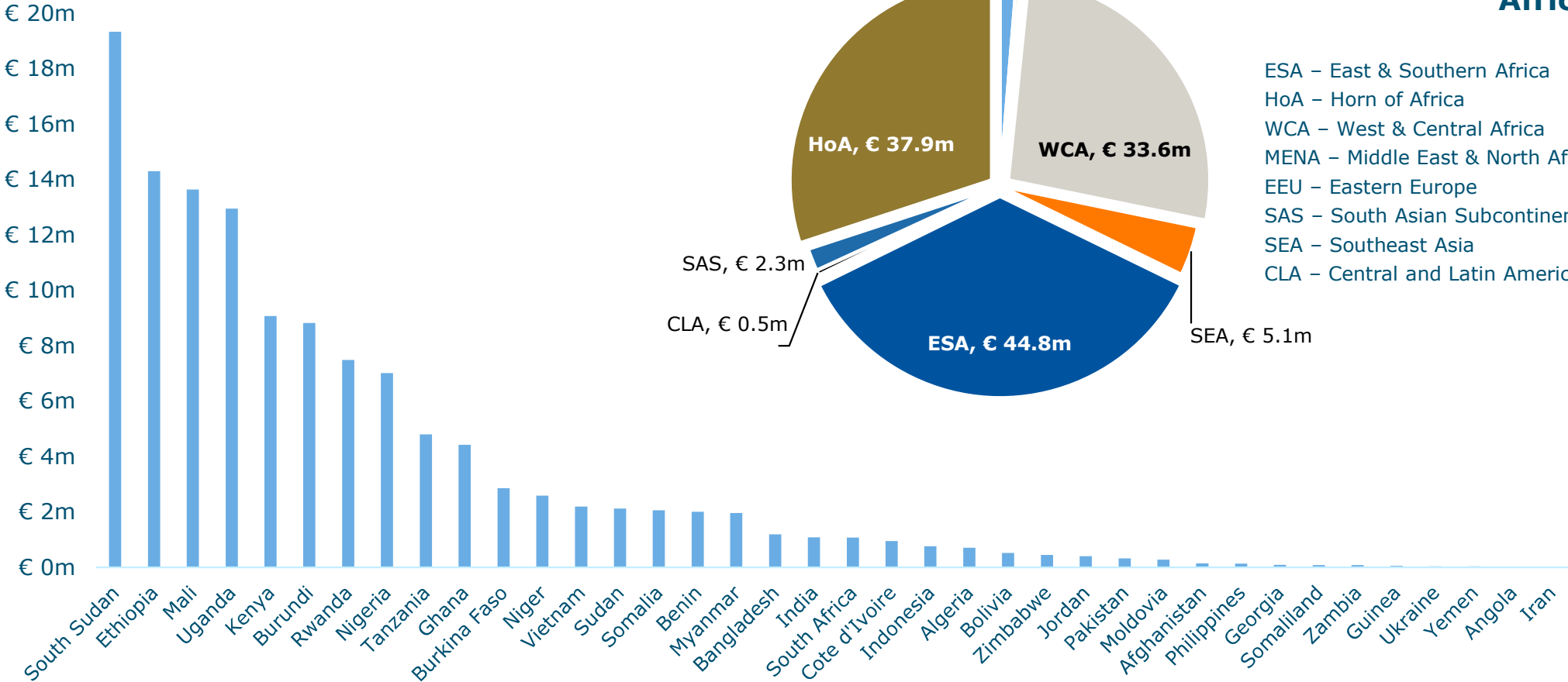
■ DHI
■ SBIR

■ FBK
■ SDGP

■ FDOV
■ TF

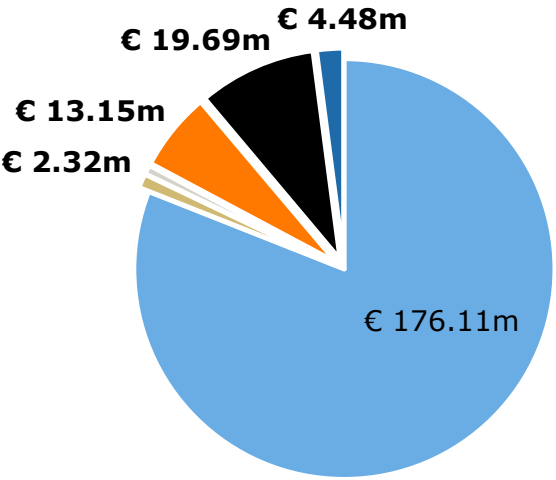
■ PSD toolkit ■ PSIP
■ Unspecified

Geography

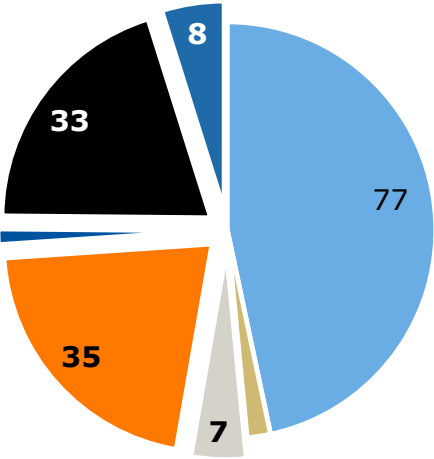


Crops

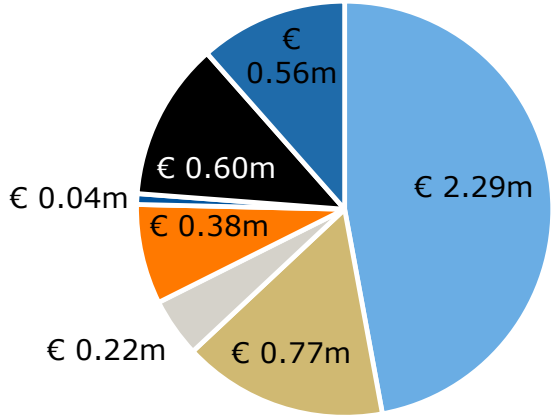
Total:
< 20% investment crop-specific



Grants.:
> 1/2 projects crop-exclusive



Ave. size:
Even distribution crop-specific



■ Multiple ■ Cereals ■ Pulses ■ Potato ■ RTBs ■ Horticulture ■ Onion

South Sudan

FNS-REPRO

- Food and Nutrition Security Resilience Programme
- € 30m investment of DGIS
- Aim: address the cause-effect relationship between conflict and food insecurity in Somalia, South Sudan, and Sudan
- Robust seed systems in South Sudan (€ 9m)
- FAO with WUR



South Sudan

A3-SEED

- Accelerating Agriculture and Agribusiness in South Sudan for Enhanced Economic Development
- € 8.5m investment of EKN in sector development
- Aim: market-oriented interventions to move from humanitarian support to a commercial and sustainable sector
- IFDC with KIT



Indonesia

True seeded shallot demonstration

- € 115k investment of RVO
- Aim: transfer new cultivation methods and create local grower knowledge with new genetics
- SSI (Sumbawang Superior Indonesia), Primaseed, Bejo, and De Groot en Slot
- Demonstration projects, feasibility studies and investment preparation studies (DHI) subsidy for SMEs



Tanzania

Vegetable seed multiplication

- € 500k loan from DGGF (RVO)
- Co-financing from investors
- Aim: set up a company in Tanzania to produce seeds for tomatoes, cucumbers, and onions
- GVA NL BV
- Private sector investment funding



Nigeria

RVO: PSD Toolkit

- Seed Sector Review | € 151k | WUR
 - Baseline veg & potato sector | € 42 | WUR
 - PVP scoping | € 13k | Naktuinbouw
 - Agro-food trade mission | € 50k | GMV
 - S4C Impact Cluster | € 483k | Rijk Zwaan, Bakker Bros, East-West, Syngenta, NABC
 - ToT S4C Kano | € 210k | WUR
-
- Transforming Nigeria's Vegetable Markets | EWS-KT & partners | € 2m

EKN

- Collaborative Seed Programme | € 3.5m | WUR, Sahel, NASC, Plantum, Naktuinbouw
- HortiNigeria | € 10m | IFDC, EWS-KT, WUR/KIT



Ethiopia

Ethiopia-Netherlands Seed Partnership

- € 6.5m investment of EKN in sector development
- Mission: enable the private sector to deliver quality seed much needed for food, nutrition and resilience
- Field and horticultural crops
- Ethiopia Seed Association, Plantum, Resilience, WUR



Ethiopia

Ethiopia-Netherlands Seed Partnership

**7 Dutch seed companies co-invest
>€1m in:**

- Market creation (demos & training)
- Local private sector development
- Internships and employment
- Variety release
- Uptake of sustainable practices
- Regulatory dialogue and reform



Lessons learned



Lessons learned

DGIS-IGG/EKN and DDE/RVO:

- Complementary investments
- Broad portfolio, variation of investments and instruments
- Delineation and complementarity by policy objective (FNS vs/ & PSD)
- Difference in avg size and output of investment

Lessons learned

DGIS-IGG/EKN:

- Variation in major national seed programmes contributing FNS outputs
- Adapted to country context, characteristics of the seed sector, agricultural and food system, opportunity/legacy/legitimacy for NL investments & partnerships
- Cross-linkages among FNS/HDP-nexus through seed sector resilience (e.g. Sahel, Horn of Africa, Uganda/Burundi/Mozambique)
- Cross-linkages among FNS/PSD (e.g. Ethiopia, Burundi) through seed sector transformation, company partnerships and employment

Lessons learned

DDE/RVO:

- Multiple primarily small and targeted instruments for PSD
- Inputs and opportunities with combi-tracks (country profiles)
 - Targeted specific seed focus (e.g., Indonesia)
 - With the potential for aggregation, integration and develop a Country-NL Seed Partnership (e.g., Nigeria, Tanzania)
 - PSD contributing to FNS (e.g., ENSP)
 - FNS/PSD contributing to HDP/resilience (e.g., A3Seed/REPRO)

Thank you

