

How does Covid-19 affect the seed sector?

Quick scan in Ethiopia, Nigeria, Myanmar & Uganda

Introductory brief (24 April 2020)



This introductory brief outlines a collaborative effort to conduct country quick scans of the impact of COVID-19 and our response to the pandemic on different functions and practical activities in the seed sector. The information generated informs the development of coping strategies and urges stakeholders to take immediate action. On at least a monthly basis, reiterations of the quick scan contribute to resilience building and continuity of activities in the seed sector, taking the unpredictability of the crisis and seasonal-dependency of the seed sector into account.

The COVID-19 pandemic is taking its toll on human lives. Whilst communities focus on health and safety, governments take measures to cope with the impact. Not only human lives, but the activities in our society and economy in general are disrupted in ways we have not seen before. As a novel virus and threat to humanity, we know very little about how it will impact agriculture, food security and income generation, and urgently need to scan for the effects of today's situation on today's activities in agriculture. They are seasonal and time-sensitive, take place in farmers' and companies' fields or greenhouses and involve many interactions of stakeholders and market transactions. If we do not carry out coping strategies to ensure that activities can take place immediately, we risk setting off a chain reaction leading to very little produce becoming available in the near future. The seed sector is no exception. A well-functioning seed sector is important for securing future crop harvests and food production. What is at stake is the resilience of the seed sector and its constituent

functions, namely: production, marketing, service delivery, regulation, coordination, and revenue generation and reinvestment, and the sector's contribution to agricultural performance in general.

The pandemic and its impact on agriculture

The World Bank¹ is projecting economic growth in Sub-Saharan Africa to decline from 2.4% in 2019 and contract by between 2.1% and 5.1% in 2020. This predicts the first recession in the region in 25 years. Agriculture is foreseen to be one of the sectors impacted most seriously, resulting in many countries in the region facing severe risks of food insecurity. With trade blockages becoming an ever more likely scenario, agricultural production is expected to shrink by 2.6% to 7%. Food imports are expected to decline substantially also, varying from 13% to 25%, due to a combination of higher transaction costs and reduced domestic demand. The outlook for Asia is also not good. The Asian Development Bank² forecasts that regional economic growth of developing Asia will decline in 2020; a downward revision of 3.3% to 2.2%. The High Level Panel of Experts under the Committee on World Food Security³ indicates that the COVID-19 crisis leads to instability in both local and global food markets, causing a disruption to food supply and availability. The poorest people will be the most affected due to these disruptions. At the same time, there is great fear that government and development partners will cut their agricultural spending and shift their priority to immediate management of the crisis in public health.

¹ World Bank, 2020. An Analysis of Issues Shaping Africa's Economic Future. Africa's Pulse, No. 21, Spring 2020. World Bank, Washington, DC ([link](#)).

² Asian Development Bank, 2020. Developing Asia Growth to Fall in 2020 on COVID-19 Impact. ADB, Manila, ([link](#)).

³ HLPE, 2020. Interim Issues Paper on the Impact of COVID-19 on Food Security and Nutrition. HLPE Secretariat, Rome ([link](#)).

Threats to the seed sector

The COVID-19 crisis is likely to impact the seed sector in multiple ways. Here we provide just a few examples. If seed inspectors cannot visit seed producers' fields, the seed produced will not be certified and thus cannot be marketed. If employees cannot go to the greenhouse, then tomato seed production may fail. If detasseling in the fields of maize hybrid seed production doesn't take place, the seed of the hybrids because of contamination will be declassified. If variety trials are not managed or visited and assessed by researchers, no new varieties will be released. If transport within and across borders is restricted, the disruption in seed distribution will lead to low stock available at retail outlets. Even if seed does make it to the agro-dealer, if farmers' mobility is impeded, they will have little other choice but to turn to their own or the neighbours grain harvests as a source of seed. If poor farming households miss out on remittances of income generated by family members in urban areas or abroad, their capital to invest in quality seed will be limited. And if government in its mitigation measures does not adequately take these considerations into account during the months when activity is needed the most in the seed sector, all will be at risk. One disruption in an activity in the chain can impact those to follow, as illustrated in the examples above. Just a few poor decisions in one or more activities can diminish the resilience of a seed sector as a whole.

The COVID-19 Quick Scan

The Wageningen Centre for Development Innovation (WCDI), part of Wageningen University & Research, in collaboration with its partners in seed programmes in Ethiopia, Myanmar, Nigeria and Uganda, aims to raise awareness on the situation and its impact on the seed sector. The Quick Scan will inform decision makers in government, civil society, research and industry in the seed sector on where impact is felt the most and contribute towards the development of coping strategies. It also urges immediate action. Beyond the immediate purpose of informing and urging practical action in the four selected countries, the partners aim to develop a global public good for contributing to enhanced seed sector resilience. The Quick Scan complements other efforts that, for example, provide guidelines to the impact in terms of seed security⁴.

Countries and partners

WCDI is guiding seed sector transformation in various countries. The Quick Scan will be

implemented in close collaboration with partners in the Integrated Seed Sector Development (ISSD) programmes in Ethiopia (ISSD Ethiopia), Uganda (ISSD Plus) and Myanmar (ISSD Myanmar). In Nigeria, WCDI collaborates with stakeholders in the development of the National Seed Road Map and design of the Nigeria-Netherlands Seed Project. The National Agricultural Seeds Council (NASC) and Sahel Consulting Agriculture & Nutrition Limited join in the effort in Nigeria.

Method

The Quick Scan will be conducted at country level through rapid remote survey and focus group discussion. As activities in the seed sector are defined by specific crops, each country will include two crops or crop groups in the scope of each iteration. Reiteration will be done at least monthly for the full duration of the crisis.

Country partners will establish a panel including at least 20 experts representing government, research, industry, service delivery and farmer organizations. Panellists will answer questions delivered in a 15 minute survey either online or on an application on their telephone. The survey covers the full range of seed sector functions and seed value chain operations. More to the point, questions relate to the level of impact on practical activities within the current frame in time. A summary of the results will be generated automatically and fed into a minimum of two focus group discussions (FGDs). Each FGD will bring around six experts together virtually to review the results, propose coping strategies, and identify responsible stakeholders to take action. Their expertise in relation to each of crop and practical experience in the seed sector determines their participation each time. As such, each FGD is crop-specific.

WCDI, with its national partners, will compile a national brief on the outcomes of the survey and FGDs, along with background information to each country, such as its current state epidemic. The aim is to publish the first and second briefs early May and June 2020 respectively. These two months span the pilot period of the project, after which the expectation is that the process is taken up independently in each country.

Guided by seed sector transformation

We apply a seed sector model, illustrated below, in ensuring that all of the following six functions are addressed: (i) seed production, (ii) seed markets,

⁴ Seed System, 2020. Seed Security Lessons + COVID-19 Lessons = Better Seed Security Response during the time of COVID-19. CRS, Baltimore ([link](#))

(iii) seed-related services, (iv) seed-related regulation, (v) seed sector coordination, and (vi) seed sector revenue generation and re-investment. The model allows the team to identify the most impacted functions and vulnerable interactions within the seed sector to direct the need for coping strategies.

Figure 1. Model of seed sector transformation



Provisional outline country briefs

WCDI and its partners are exploring how to structure the country briefs. A tentative structure is as follows:

- Status of the COVID-19 crisis in terms of the extent of the local epidemic, and government's measures and their impact on society and economy;
- Description of the seed sector, contextualized within the cropping calendar, agricultural economy and food security of the country;
- A dashboard on the current impact on (i) farmers' access to and use of quality seed, and (ii) activities within the seed value chains of two selected crops;
- The most important and pressing challenges within each of the functions of the seed sector;
- Coping strategies proposed and stakeholders in the lead in making a difference through practical action;
- Overview of relevant information resources.

Kick off of the pilot process

WCDI is developing the method and tool in close collaboration with its partners in the four countries. During the week of 20 April 2020, they have been engaged in prototyping the survey, FGDs, analytical

framework and country brief format. Partners selected focus crops/crop groups, and compiled the lists of expert panellists and participants in each FGD. During the week of April 27th, the survey and FGDs will be run in each of the four countries, with immediate follow up in analysis and preparation of the briefs. In the week of May 4th, we plan to publish and disseminate the country briefs using multiple media and, if feasible, national webinars. A synthesis brief will be compiled in the week of May 11th, and shared globally. A global webinar will be organized in collaboration with the ISSD Africa Community of Practice. We have the same sequence in mind for June, once the Quick Scan is reiterated for the first time.

Communication

In line with emerging lock-down restrictions in the countries in which our partners are based, the entire exercise goes digital. As already mentioned earlier, the survey will be both web- and app-based, whilst FGDs take place virtually by video-conferencing. The team will use a variety of communication tools including social media, blogs, video messages and portals to share the outcomes of the Quick Scan. The same applies for the Quick Scan as a tool itself, which we aim to share as a public good for a wide array of stakeholders to assist in their efforts in transforming agriculture in other low and middle income countries.

Outputs of the pilot process

- 1 x Introductory Brief (this document)
- 8 x Country Quick Scan Briefs (monthly in each of the four countries)
- 2 Quick Scan Global Synthesis Briefs (monthly)
- 1 Tool Guide including method for use in other countries and sectors
- 1 Brief with a plan for continuity in four countries, services to other countries and globally (upon two pilots)
- Several communication products shared through diverse social media and communication platforms (at global and national levels)
- 1-5 Webinars (at global and, if feasible, national levels)

Organization

Wageningen University & Research (WUR) is a global leading knowledge institute specialised in the global domain of healthy food and the living environment. Wageningen Centre for Development Innovation (WCDI), part of WUR, has specific expertise and dedication for supporting the development of sustainable and inclusive food systems in the low and middle income countries. Its seed cluster is engaged in the design and implementation of programmes that guide the transformation of seed sectors in

several countries throughout the world. It has developed a strong reputation in taking an integrated or pluralistic approach to seed sector development, thereby becoming a preferred partner to seed sector stakeholders in various countries. WCDI is in a unique position to lead this pilot as it has a wide global network in the seed sector and leadership on the expertise.

Team

WCDI's seed cluster includes staff with technical, facilitation and communication expertise in the seed sector; they will support in the effort to produce the

series of Quick Scans in the four countries. The team includes Abishkar Subedi, Arnab Gupta, Gareth Borman, James Mulkerrins, Marja Thijssen and Walter de Boef. In Ethiopia, Amsalu Ayana and Mohammed Hassena of ISSD Ethiopia will lead the country effort. In Myanmar, Swe Zin Myint Thein and Win Thein of ISSD Myanmar, Ministry of Agriculture, Livestock and Irrigation (MOALI), take the lead. Geoffrey Otim, Charles Ssemwogerere and Bonny Ntare of ISSD Plus join in conducting the quick scan in Uganda. In Nigeria, the effort will be led by Folarin Okelola and Osundiya Olusegun of NASC, and Chinedu Agbara of Sahel Consulting.



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