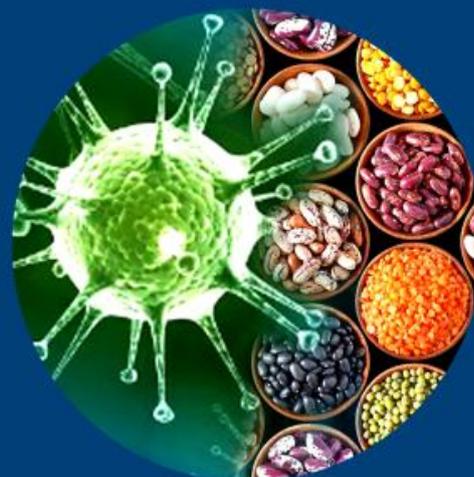


# How does COVID-19 affect the seed sector?

*Quick scan in Ethiopia, Nigeria, Myanmar & Uganda*

Introductory brief (28 April 2020)



To avoid a food crisis in follow up to the health crisis we currently face, urgent coping strategies are needed for the seed sector. 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. On at least a monthly basis, reiterations of the quick scan will contribute towards the development of coping strategies that enhance resilience and support 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.

Seed sector activities 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 seed activities take place, we risk setting off a chain reaction leading to little seed becoming available in the near future, which may contribute to a major food crisis.

A well-functioning seed sector is vital to 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 seed sector's contribution to agriculture.

***"The resilience of the seed sector and its contribution to ensuring food security is at stake."***

## **The pandemic and its impact on agriculture**

The World Bank<sup>1</sup> 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 sector impacted most seriously, resulting in many countries in the region facing serious risk of food insecurity. With trade blockages becoming an ever more likely scenario, agricultural production could shrink by 2.6% to 7%. Food imports are expected to decline substantially also, varying from 13% to 25%. The outlook for Asia is also not good. The Asian Development Bank<sup>2</sup> 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 Security<sup>3</sup> 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 fear that government and development partners will cut their agricultural spending and shift priority towards managing the immediate effects of the crisis in public health care.

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

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

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

## COVID-19 threat to the seed sector

The COVID-19 crisis is likely to impact the seed sector in multiple ways. We provide just a few examples:

- If variety trials are not visited and assessed by researchers, no new varieties will be released
- If employees cannot go to the greenhouse, then tomato seed production will fail, and if detasseling in the fields of hybrid maize seed doesn't take place, it will be declassified as seed
- If inspectors cannot visit the fields of seed producers, the seed cannot be certified and sold
- If transport is restricted, the disruption in seed distribution will lead to low stock available at retail outlets and little choice for farmers than to turn to their own or their neighbours' harvests as a source of seed
- And if government in its measures does not adequately take these considerations into account during the months when seed activities are needed the most, 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

Wageningen Centre for Development Innovation (WC DI), 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, industry, research and civil society 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 the Quick Scan as 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 security<sup>4</sup>.

## Countries and partners

WC DI guides seed sector transformation in various countries. The Quick Scan will be implemented in close collaboration with partners in the Integrated Seed Sector Development programmes in Ethiopia (ISSD Ethiopia), Uganda (ISSD Plus) and Myanmar (ISSD Myanmar). In Nigeria, WC DI 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 the effort in Nigeria.

## Method

The Quick Scan will be conducted at country level through rapid remote survey and focus group discussions (FGDs). 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 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.

WC DI, 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 of 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.

Figure 1. Model of seed sector transformation



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

## Guided by seed sector transformation

We apply a seed sector model, illustrated in figure 1, in ensuring that all of the following six functions are addressed: (i) seed production, (ii) seed markets, (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.

## Provisional outline country briefs

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

- State of the COVID-19 epidemic, government's response, and their impact on society and the 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) functions and activities within the seed value chains
- The most important and pressing challenges within each of the functions of the seed sector
- Coping strategies proposed and stakeholders in the lead in taking immediate 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 27<sup>th</sup>, the survey and FGDs will be run in each country, with immediate follow up in analysis and preparation of the briefs. In the week of May 4<sup>th</sup>, 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 11<sup>th</sup>, 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 Quick Scan goes digital. As mentioned, 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.

## About WCDI

Wageningen Centre for Development Innovation supports value creation by strengthening capacities for sustainable development. As the international expertise and capacity building institute of Wageningen University & Research we bring knowledge into action, with the aim to explore the potential of nature to improve the quality of life. WCDI's 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 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 the effort to produce 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.

