

REPORT OF THE BASELINE STUDY TO ASSESS THE STATUS OF THE NIGERIAN SEED TRADE ASSOCIATION JANUARY 2024

1.0 Introduction

Collaborative Seed Programme

The Collaborative Seed Programme (CSP) brings together Nigerian and Dutch seed sector stakeholders with the aim to enhance the performance of the Nigerian seed sector. It takes a systemic approach for sustainably addressing key challenges in the seed sector. CSP contributes to the vision of the National Seed Road Map (NSRM) of Nigeria being that the seed sector becomes more competitive, resilient, profitable, innovative and adaptive, sustainable, inclusive, resistant and transparent. The programme focuses on 8 CSP Topics drawn from 22 Strategic Innovation Pathways (SIPs) of the NSRM.

The CSP is governed by Steering Committee including representatives of key stakeholders in the seed sector in Nigeria and the Netherlands. The Steering Committee provides strategic oversight and guidance to the programme, and ensure that the CSP fosters the development of the agricultural sector in Nigeria and is aligned with other initiatives and networks.

Programme implementation is coordinated by Wageningen Centre for Development Innovation (WCIDI), part of Wageningen University & Research (WUR). WCIDI leads the consortium responsible for the implementation of the programme. In Nigeria, Sahel Consulting coordinates activities through a CSP office established in Abuja. Both WCIDI and Sahel Consulting support partners in the coordination and implementation of CSP topics and their actions. The programme management team includes staff of WCIDI, Sahel Consulting and NASC.

The Seed Sector Platform of Nigeria (Sector Governance and Coordination Topic) is directed by the National Seed Road map (NSRM) which is driven by the question. How to guide government, stakeholders and development partners in exploring and agreeing on ways to foster the development of seed sectors in a coordinated aligned and structured fashion, This all with the aim of increasing farmers access to quality seed of new and improved varieties. contributing to enhances crop productivity through a participatory and iterative process the NSRM elaborated strategic innovative partway for 22 topics characterized by stakeholders that needs to be addressed for improving the performance of the Nigerian seed sector.

The National seed sector platform brings together seed sector stakeholders from industry, government, civil society and knowledge institute to convey seed sector insight scale innovations, facilitate dialogue, clarity and consolidate role and responsibility and support collaboration. The platform promotes a collaborative and sector driven implementation of the National Seed Road Map. The platform also aims to map progress on NSRM implementation, seek for commitment among stakeholders and advocacy for advancing specific topics/ Strategic Innovation Pathways.

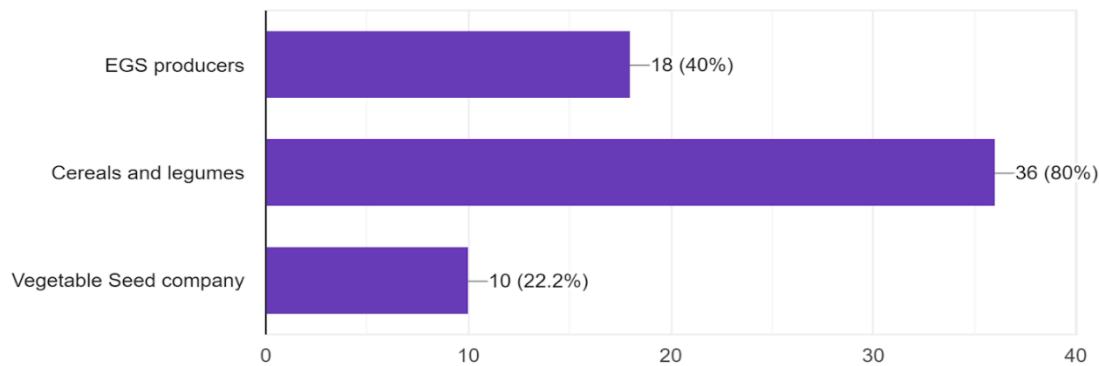
2.0 Study Findings on the status of the Nigerian Seed Trade Association (NSTA):

This report analyzes the responses from a questionnaire distributed to seed companies within the Nigerian Seed Trade Association (NSTA). The aim was to assess the current state of the seed sector, including organizational categories, market activities, yearly turnover, and number of employees. Additionally, insights were sought on market developments, the relevance of sector topics, and the perceived importance of NSTA membership. provide effective seed sector association governance to strengthen the operation of the private seed sector towards National food security.

2.1 Organizational Categories and Market Activities:

Under which category does your organization fall? (Tick as appropriate)

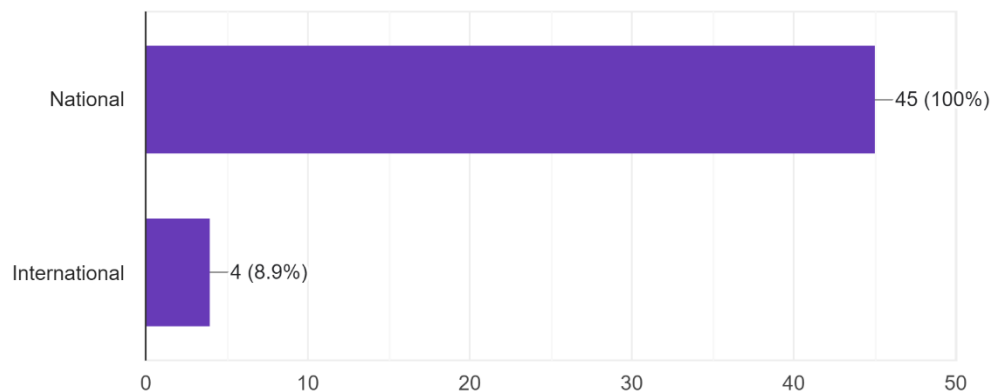
45 responses



The respondents encompassed diverse organizational categories, with (18) 40% identifying as EGS Producers, (36) 80% as Cereals and Legumes companies, and (10) 22.2% as Vegetable Seed Companies. It is noteworthy that several companies participate in multiple organizational categories.

Which of the following market is your company active?

45 responses

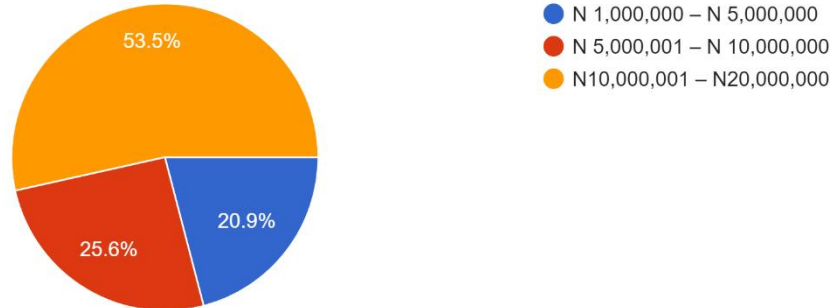


The majority, which constitutes 45 seed companies (100%), were active in the national market, while 8.9% participated in international markets. It is also important to note that several companies participate in multiple organizational categories.

2.2 Financial and Employee Metrics:

What is your yearly turnover?

43 responses



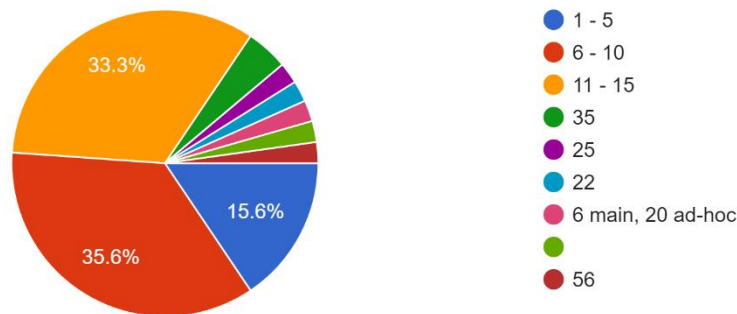
N 1,000,000 – N 5,000,000: 9 respondents (20.9%) fall within this bracket, indicating prevalent yearly turnovers ranging from N 1,000,000 to N 5,000,000.

N 5,000,001 – N 10,000,000: The second most common range, with 11 (25.6%) of respondents falling into this category, suggests a moderate presence of entities with slightly higher turnovers.

N 10,000,001 – N 20,000,000: This bracket represents 23 (53.5%) of responses, indicating a smaller but notable proportion of entities with a higher yearly turnover.

Number of employees

45 responses

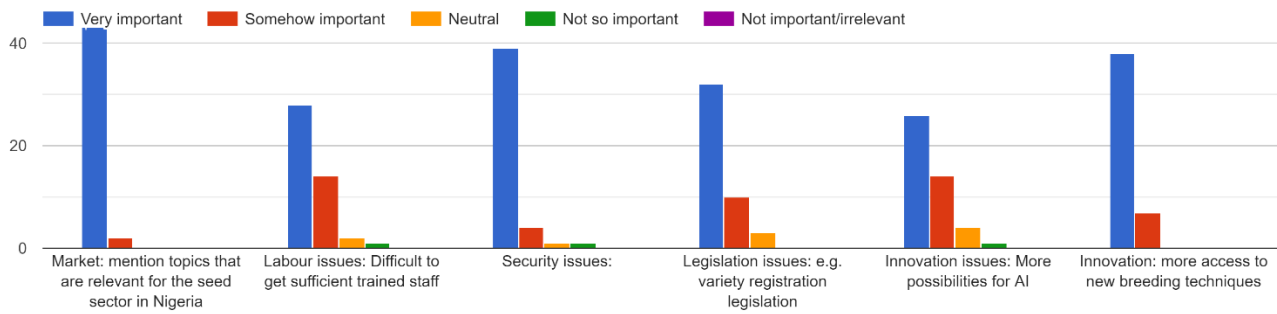


From the pie chart above, the number of employees varied, with 1-5 employees reported by 7 companies which takes up for 15.6%, 6-10 employees by 16 (35.6%), and 11-15 employees by 15 (33.3%). Additionally, 2 companies had 35 employees (4.4%), 1 had 25 (2.2%), and another had 22 (2.2%). One company reported having 6 main employees and 20 ad-hoc staff (1, 2.2%).

2.3 Market Developments:

Various perspectives on changes, including finance challenges, out-grower management, technology adoption, and government policy were captured in this session. The numbers in the brackets signify the number of companies that responded to the relevant questions.

Below you find several developments in the sector. Can you please indicate if they are relevant to your sector?



From the chart provided above, the following were noted

2.4 Relevant Sector Developments:

- **Market (Very Important - 43 responses):**

The high importance placed on market developments (43 responses) indicates that respondents perceive market-related issues as crucial factors influencing the seed sector. This could encompass aspects such as market trends, demand, and dynamics, suggesting a strong emphasis on staying informed and responsive to market conditions.

- **Labour Issues (Somehow Important - 14 responses):**

While not considered of paramount importance, the acknowledgment of labour issues as somehow important (14 responses) suggests that respondents recognize the significance of workforce-related challenges within the seed sector. This could involve issues such as the availability of skilled labor, training, or human resource management.

- **Security Issues (Very Important - 39 responses):**

The overwhelming consensus on the very high importance of security issues (39 responses) underscores the critical role security plays in the seed sector. This may encompass concerns about the safety of seed production sites, transportation, and overall protection against theft or tampering.

- **Legislation Issues (Very Important - 32 responses):**

The significant importance attributed to legislation issues (32 responses) indicates that respondents place great value on the regulatory framework governing the seed sector. This could involve considerations such as variety registration legislation, quality control regulations, and other legal aspects impacting seed production and trade.

- **Innovation Issues (Somehow Important - 14 responses):**

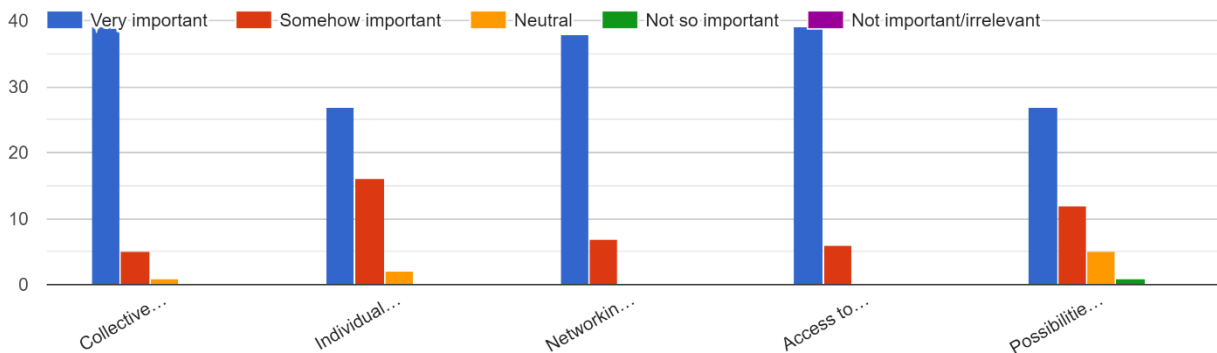
While not perceived as overwhelmingly critical, the recognition of innovation issues as somehow important (14 responses) suggests an awareness of the role innovation plays in the seed sector. This could involve technological advancements, research, and development, or the adoption of new practices to enhance seed production.

- **Access to New Breeding Techniques (Very Important - 38 responses):**

The very high importance assigned to access to new breeding techniques (38 responses) signifies the recognition of the pivotal role that innovative breeding methods play in the seed sector. This could involve advancements in breeding technologies aimed at developing new and improved seed varieties

2.5 Membership Importance:

Membership What are the most important reasons to be a member of the Nigerian Seed Trade Association?



The chart above explains some of the most important reasons to be a member of the NSTA

a) Collective Advocacy (Very Important - 39 responses):

The unanimous agreement on the very high importance of collective advocacy (39 responses) underscores the recognition among respondents that collective efforts and representation are crucial for addressing common issues and advocating for the interests of the seed sector. This suggests a strong emphasis on unity and collaborative action.

b) Individual Support (Somehow Important - 16 responses):

While not considered as critical as collective advocacy, the acknowledgment of individual support as somehow important (16 responses) indicates an awareness of the need for personalized assistance within the association. This could involve tailored support for specific challenges faced by individual members.

c) Networking/Meeting Platform (Very Important - 38 responses):

The overwhelming consensus on the very high importance of networking/meeting platforms (38 responses) emphasizes the value placed on opportunities for members to connect, share knowledge, and build professional relationships. This suggests a recognition of the importance of fostering a strong network within the association.

d) Access to Knowledge (Very Important - 39 responses):

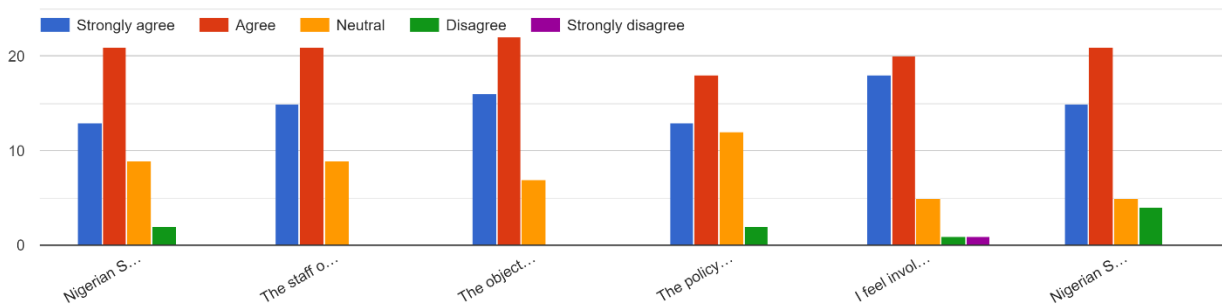
The unanimous agreement on the very high importance of access to knowledge (39 responses) highlights the priority placed on information and learning within the association. This could involve sharing industry insights, updates on regulations, and best practices to enhance the knowledge base of members.

e) Participation in Committees (Neutral - 12 responses):

The neutral stance on participation in committees (12 responses) suggests a divided opinion among respondents regarding the importance of active involvement in specialized committees. While some may see it as a valuable engagement opportunity, others may view it as less critical to their membership experience.)

2.6 Nigerian Seed Trade Association:

Please share your opinion on Nigerian Seed Trade Association



a) Proactive (Strongly Agree - 20 responses):

The strong agreement that NSTA is proactive (20 responses) indicates a unanimous positive perception among respondents. This suggests that members believe the association takes initiative, anticipates challenges, and actively works towards the betterment of the seed sector.

b) Professional Staff (Strongly Agree - 20 responses):

The unanimous strong agreement on the professionalism of NSTA staff (20 responses) reflects a high level of satisfaction with the competence and conduct of the association's personnel. This positive perception suggests that members feel confident in the expertise and professionalism of the staff.

c) Clear Objectives (Agree - 20 responses):

The agreement that NSTA has clear objectives (20 responses) indicates a shared understanding among members regarding the goals and purposes of the association. This alignment in perception suggests that members are aware of the direction and focus of NSTA's efforts.

d) Innovative Policy (Agree - 20 responses):

The agreement on NSTA having innovative policies (20 responses) suggests that members perceive the association as forward-thinking and open to adopting new and creative approaches. This positive perception implies that NSTA is responsive to industry advancements and changing needs.

e) Member Involvement (Neutral - 20 responses):

The neutral stance on member involvement (20 responses) indicates a lack of consensus among respondents regarding the level of engagement and participation of members within NSTA. This could suggest varied opinions on the degree to which members actively contribute to the association's activities.

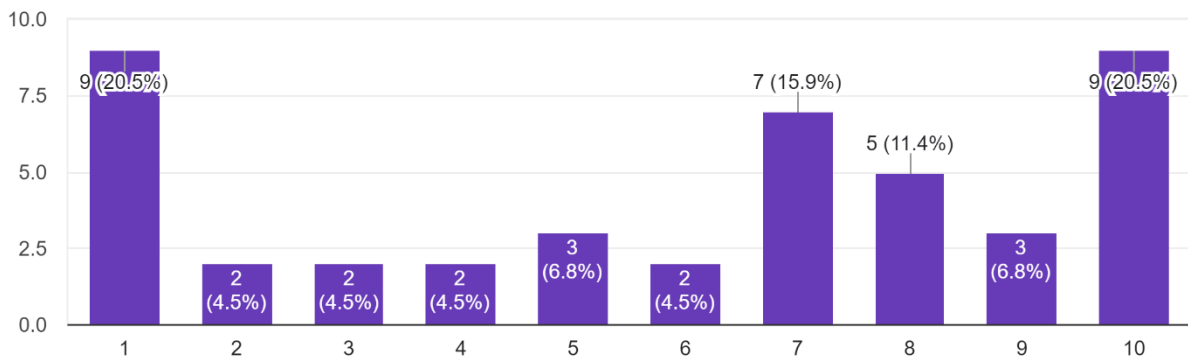
f) Understanding Member Needs (Agree - 20 responses):

The agreement that NSTA understands member needs (20 responses) reflects a positive perception that the association is attuned to the requirements and challenges faced by its members. This suggests that NSTA takes member feedback into account when shaping its policies and initiatives. Feedback on Future Activities and Focus:

2.7 Recommendation for Membership:

Would you advise becoming a member to Nigerian Seed Trade Association to your non-colleagues? (indicate this on a scale from 1-10)

44 responses



The chart above indicates an average score of 6.8 which suggests a moderately positive sentiment among respondents regarding recommending NSTA membership to non-colleagues. This indicates that while there is a favorable opinion, it might not be an overwhelmingly strong endorsement. Members may see value in the association but might also recognize areas where improvement is possible.

Looking at the individual services the following are observed from the chart;

a) Negotiating Labor Agreements (Very Important - 18 responses):

The response indicating the very high importance of negotiating labor agreements (18 responses) underscores the significance members place on fair labor practices within the seed sector. This may involve efforts to ensure appropriate working conditions, wages, and labor relations for those involved in seed production.

b) Providing Advice (Very Important - 23 responses):

The strong agreement on the very high importance of providing advice (23 responses) suggests that members highly value receiving guidance and counsel from NSTA. This may involve expert advice on various aspects of seed production, business strategies, and compliance with industry regulations.

c) Training Courses (Very Important - 24 responses):

The unanimous agreement on the very high importance of training courses (24 responses) indicates a widespread recognition of the value of continuous learning within the seed sector. Members place high importance on opportunities for skill development, knowledge enhancement, and staying abreast of industry advancements.

d) Communication on the Website (Very Important - 22 responses):

The strong agreement on the very high importance of communication on the website (22 responses) highlights the role of online platforms as crucial communication channels. Members expect timely and relevant information, updates, and resources to be easily accessible through the association's website.

e) General Terms and Conditions for the Seed Sector (Very Important - 24 responses):

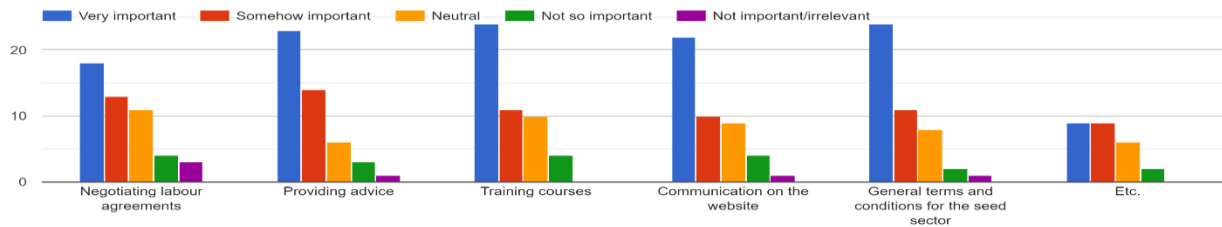
The unanimous agreement on the very high importance of general terms and conditions for the seed sector (24 responses) underscores the necessity for clear and standardized guidelines within the industry. This may involve establishing consistent practices, regulations, and quality standards.

f) Other Services (Etc. - 9 responses):

The "etc." category with 9 responses indicates that a small percentage of respondents provided additional comments or opinions on services not explicitly listed in the options. This reflects the diverse expectations and needs of members beyond the predefined categories.

2.8 Offer and Contributions

Offer and contribution How important are the services of the Nigerian Seed Trade Association for your organization?



The chart above explains the services of the Nigerian Seed Trade Association;

a) *Negotiating Labor Agreements:*

Very Important (18 responses), Somehow Important (13 responses):

The responses indicate that negotiating labor agreements is considered very important by a significant number of respondents (18 responses). This underscores the importance members place on ensuring fair and favorable labor conditions within the seed sector. The "somehow important" responses (13) suggest that while there is recognition of its significance, there are also members for whom this aspect may be less critical compared to other services.

b) *Providing Advice:*

Very Important (23 responses), Somehow Important (14 responses):

The high number of "very important" responses (23) suggests that members highly value receiving advice from the Nigerian Seed Trade Association. This may involve expert guidance on various aspects of seed production, business strategies, and compliance with industry regulations. The "somehow important" responses (14) indicate that there are members who see the value in advice but might not consider it as critical as other services.

c) *Training Courses:*

Very Important (24 responses), Somehow Important (11 responses):

The unanimous agreement on the very high importance of training courses (24 responses) indicates a widespread recognition of the value of continuous learning within the seed sector. Members highly prioritize opportunities for skill development, knowledge enhancement, and staying abreast of industry advancements. The "somehow important" responses (11) suggest that there are members who find training courses beneficial but may not prioritize them as much as other services.

d) *Communication on the Website:*

Very Important (22 responses), Somehow Important (10 responses):

The strong agreement on the very high importance of communication on the website (22 responses) highlights the crucial role of online platforms as communication channels. Members expect timely and relevant information, updates, and resources to be easily accessible through the association's

website. The "somehow important" responses (10) suggest that while members value online communication, it may not be as critical for some compared to other services.

2.9 General Terms and Conditions for the Seed Sector:

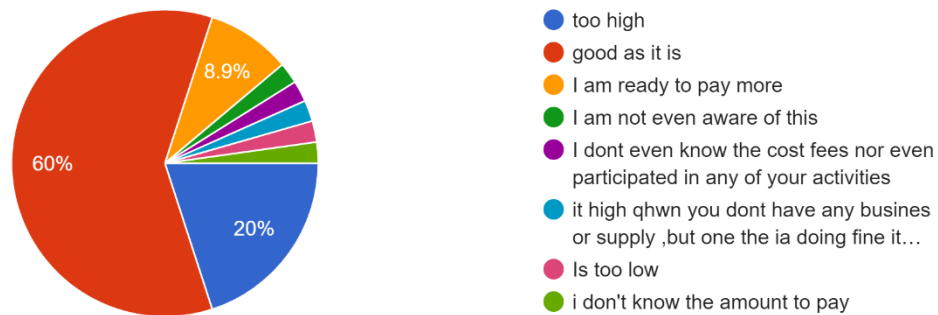
Very Important (24 responses), Somehow Important (11 responses):

The unanimous agreement on the very high importance of general terms and conditions for the seed sector (24 responses) underscores the necessity for clear and standardized guidelines within the industry. Members highly prioritize the establishment of consistent practices, regulations, and quality standards. The "somehow important" responses (11) indicate that while this is crucial, some members may prioritize other services slightly more.

2.10 Contribution Fees:

What do you think about the contribution fees?

45 responses



a) Too High (20%):

The 20% of respondents expressing that the contribution fees are "too high" suggests that a notable portion of members feels that the current fee structure is perceived as costly. This may indicate concerns about affordability or a perception that the fees are not commensurate with the perceived benefits.

b) Good as It Is (60%):

The significant majority of respondents (60%) indicating that the contribution fees are "good as it is" reflects a widespread satisfaction with the current fee structure. Members in this category likely perceive the fees as reasonable and aligned with the value they receive from being a part of the Nigerian Seed Trade Association.

c) I Am Ready to Pay More (8.9%):

The 8.9% of respondents expressing willingness to pay more suggests that there is a small but significant segment of members who believe that an increase in contribution fees would be justified. This may indicate a desire for enhanced services, activities, or initiatives that could be funded through higher contributions.

d) I Am Not Even Aware of This (2.2%):

The 2.2% of respondents indicating a lack of awareness about the contribution fees suggests that there is a small segment of members who may not be fully informed about the financial aspects of their association membership. This could be due to communication gaps or a need for improved transparency on fee structures.

e) I Don't Even Know the Cost Fees nor Even Participated in Any of Your Activities (2.2%):

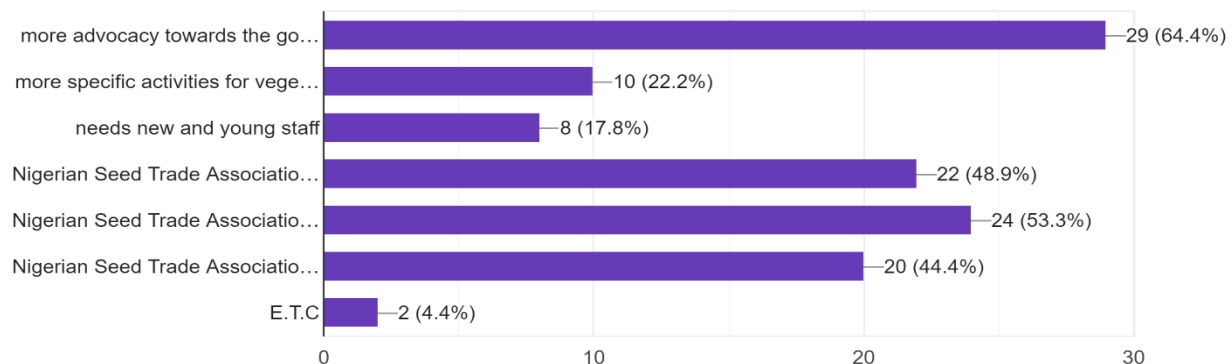
The 2.2% expressing a lack of knowledge about both the cost fees and participation in activities suggests a disconnect between these members and the association's offerings. This highlights a potential communication gap that needs addressing to ensure all members are informed and engaged.

2.11 Services Improvement Suggestions:

- Nothing: 3 responses
- Market connectivity: 1 response
- Not much of its services are known or accessible: 1 response
- International trading will be difficult: 1 response
- I don't know about this association at all: 1 response

2.12 Chosen Future Activities:

Future of Nigerian Seed Trade Association Below you find some ideas for future activities. Please indicate which 2 topics are the most relevant for you
45 responses



a) More Advocacy Towards the Government (29 responses - 64.4%):

The majority of respondents strongly advocate for more engagement in advocacy efforts toward the government (29 responses, 64.4%). This suggests that members believe increased efforts in communicating with and influencing governmental policies will be beneficial for the seed sector. The high percentage reflects a shared sentiment among respondents regarding the importance of governmental support and understanding.

b) More Specific Activities for Vegetables (10 responses - 22.2%):

A significant portion of respondents (10 responses, 22.2%) express the need for more specific activities focused on vegetables. This indicates a recognition among members of the importance of tailored initiatives and strategies for the vegetable segment of the seed sector. The 22.2% response rate suggests that while not a unanimous sentiment, there is a notable interest in specific interventions related to vegetable seed activities.

c) Needs New and Young Staff (17.8%):

The response indicating the need for new and young staff (17.8%) suggests that a portion of respondents feels the association would benefit from a refreshed and youthful perspective. This may involve bringing in individuals with fresh ideas, energy, and contemporary insights to contribute to the growth and adaptability of the Nigerian Seed Trade Association.

d) NSTA Should Create Committees/Working Groups for People with Equal Interests (48.9%):

The significant response (48.9%) favoring the creation of committees or working groups for people with equal interests suggests a strong desire among respondents for more specialized and targeted collaboration within the association. This indicates a recognition that specific committees could address the unique needs and concerns of different interest groups, fostering a more inclusive and tailored approach.

e) NSTA Should Do More on Communication (53.3%):

The majority response (53.3%) advocating for increased efforts in communication indicates a shared belief among respondents that improved communication within the association is crucial. This may involve enhanced information dissemination, transparent updates on activities, and more effective channels for member engagement. The high percentage reflects a widespread desire for improved communication practices.

f) NSTA Should Collect More Data on the Sector (44.4%):

The response indicating the need for collecting more data on the sector (44.4%) suggests that a substantial portion of respondents recognize the importance of data-driven decision-making. This may involve gathering information on market trends, industry challenges, and member needs to facilitate informed planning and strategy development.

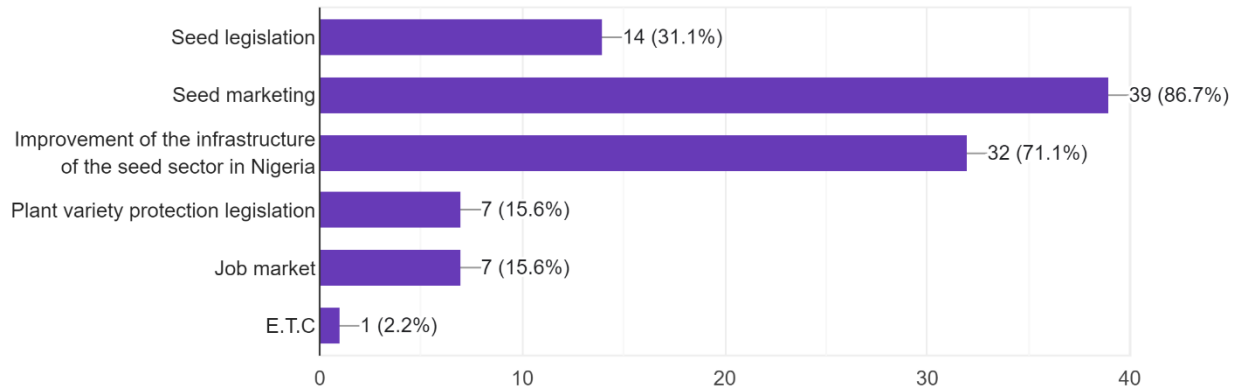
Etc. (4.4%):

The "etc." category with 4.4% suggests that a small percentage of respondents provided additional suggestions or opinions not explicitly listed in the options. This underscores the diversity of perspectives within the association, with respondents expressing a range of views on various aspects beyond the predefined categories

2.13 Chosen Focus Areas for the Coming Years:

Focus on which topics On which two dossiers Nigerian Seed Trade Association should put the most attention in the coming years

45 responses



a) **Seed Legislation (14 responses - 31.1%):**

The response indicating the importance of seed legislation (31.1%) suggests that a notable portion of respondents recognizes the significance of regulatory frameworks governing the seed sector. This may involve advocating for clear and supportive legislation to ensure fair practices, quality control, and adherence to standards.

b) **Seed Marketing (39 responses - 86.7%):**

The overwhelming response (86.7%) emphasizing the importance of seed marketing indicates a strong consensus among respondents on the critical role of effective marketing strategies. This underscores the recognition that successful promotion and distribution of seeds are essential for the growth and sustainability of the seed sector.

c) **Improvement of the Infrastructure of the Seed Sector in Nigeria (32 responses - 71.1%):**

The high response rate (71.1%) for the improvement of seed sector infrastructure suggests that a significant majority of respondents' view enhancements in physical and logistical infrastructure as crucial. This may involve investments in facilities, transportation, and technology to streamline seed production and distribution.

d) **Plant Variety Protection Legislation (7 responses - 15.6%):**

The response indicating the importance of plant variety protection legislation (15.6%) suggests that a smaller, yet notable, segment of respondents emphasizes the need for legal mechanisms to safeguard intellectual property rights related to plant varieties. This may involve advocating for laws that protect breeders' rights and encourage innovation.

e) Job Market (7 responses - 15.6%):

The response focusing on the job market (15.6%) suggests that a portion of respondents considers the employment aspect within the seed sector. This may involve advocating for policies or initiatives that stimulate job creation, skill development, and workforce engagement within the industry.

f) Etc. (2.2%):

The "etc." category with 2.2% indicates that a very small percentage of respondents provided additional focus areas or suggestions beyond the predefined options. This highlights the diversity of perspectives within the association, with respondents expressing unique priorities for the growth and development of the seed sector.

2.14 Most Important Topic for Nigerian Seed Trade Association:

Seed regulation, seed marketing, and capacity building: Multiple responses emphasizing the need for comprehensive work in these areas.

Marketing and market linkages: Highlighting the importance of market connectivity and effective distribution.

Advocacy with the government and networking within the association: Emphasizing collaboration and governmental engagement.

Improved seed varieties: A focus on enhancing the quality and variety of seeds.

Innovation in the seeds industry and acknowledging the role of technology in seed analysis, data collection, and production tracking.

Infrastructure improvement of seed companies: Stresses the need for enhancing the operational infrastructure.

2.15 Final Comments or Remarks:

The following are summary of final comments and remarks made by the seed companies

1. Calls for closer links between research institutes and seed companies.
2. Emphasis on the importance of seed for food security.
3. Suggestion for the government to facilitate closer collaboration between research institutes and seed companies.
4. A plea for government support and grant for seed companies.
5. Encouragement for unity among seed trade associations in Nigeria.
6. Expressions of gratitude and the desire for friendship.
7. The importance of certified seeds for successful food security.
8. Support for seed companies establishing Satellite Seed Testing Laboratories.
9. Positive outlook on the future of the Nigerian Seed Trade Association with a call for government and international support.