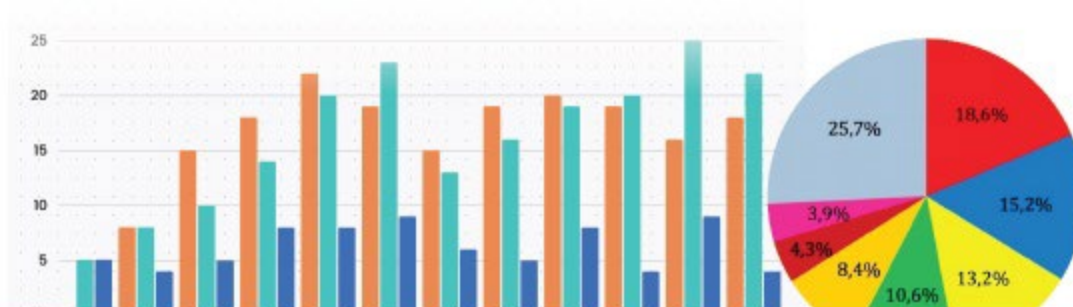




# SEED COMPANY SURVEY: PROVIDING DIRECTIONS FOR SEEDAN'S FUTURE

Implemented by NASC as part of the  
Collaborative Seed Programme

January 2024





## Seed company survey; providing directions for SEEDAN's future

*Implemented by NASC as part of the Collaborative Seed Programme in January 2024*

### 1.0 Introduction:

Agriculture is a significant contributor to Nigeria's economy; and access to and use of quality seed of improved and adapted varieties is key to increase agricultural performance. A well-organized and specialized seeds industry can boost the country's agricultural productivity, leading to increased income for farmers and improved economic growth at both the local and national levels. The National Seed Road Map (NSRM) of Nigeria ([link](#)) prioritizes 22 key challenges that need to be addressed to increase the performance of Nigeria's seed sector. For each of the challenges the document provides innovation pathways, which elaborate vision and ambitions, propose activities, provide policy references and examples, and suggest stakeholders to involve. The Collaborative Seed Programme (CSP; [link](#)), under the Nigeria-Netherlands Seed Partnership works on eight topics of the NSRM.

One of the challenges, elaborated in the NSRM (but not addressed in the CSP) addresses the functioning of the Seed Entrepreneurs Association of Nigeria (SEEDAN) (see page 32), recognizing the pivotal role of a national seed trade association as the coordination body of the seed industry, for domestic seed entrepreneurs, as well as international seed entrepreneurs who want to enter the Nigerian market. The NSRM indicates the following ambition of SEEDAN: 'Enhanced structure, functioning and governance of SEEDAN, ensuring coverage and representation of all agricultural zones, crops and business types'. The objectives of SEEDAN include the following: (i) serve as a seed industry forum for promoting sector growth by discussing common interests; (ii) develop operational ethics and guidelines; (iii) support policy formulation; and (iv) serve the seed industry as a reference and speaking point for communications with authorities, institutions, projects and NGOs. SEEDAN currently has about 75 seed company members, whereas NASC has more than 300 registered seed companies and over 100 registered seed producers.

With new leadership recently elected, SEEDAN is now looking how to further develop and professionalize its structure, increase its number and diversity of members, and strengthen its representation position towards the outside world. Strengthening governance and structure, and developing additional services to members are preconditions for attracting new paying members, developing a strong leadership position promoting seed industry development. As part of its programme, the CSP supports strengthening the capacity of SEEDAN's management and secretariat for effective association governance, promotion of organizational excellence, compliance with legal requirements, accountability, transparency and overall success.

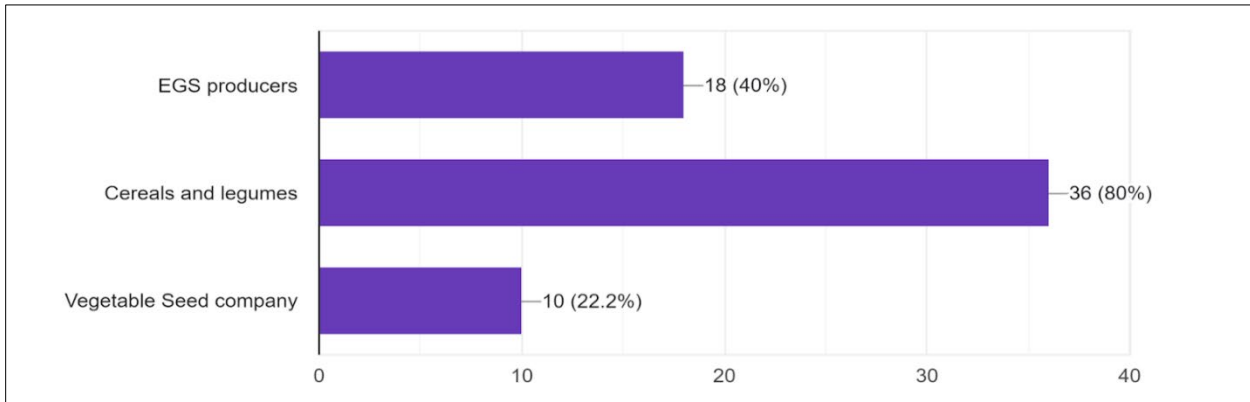
A questionnaire was distributed among Nigerian seed entrepreneurs, to explore their needs and interests in relation to the services of the seed association. This report analyzes the responses. Results will be used to guide the future activities of SEEDAN.

**2.0 Study Findings:**

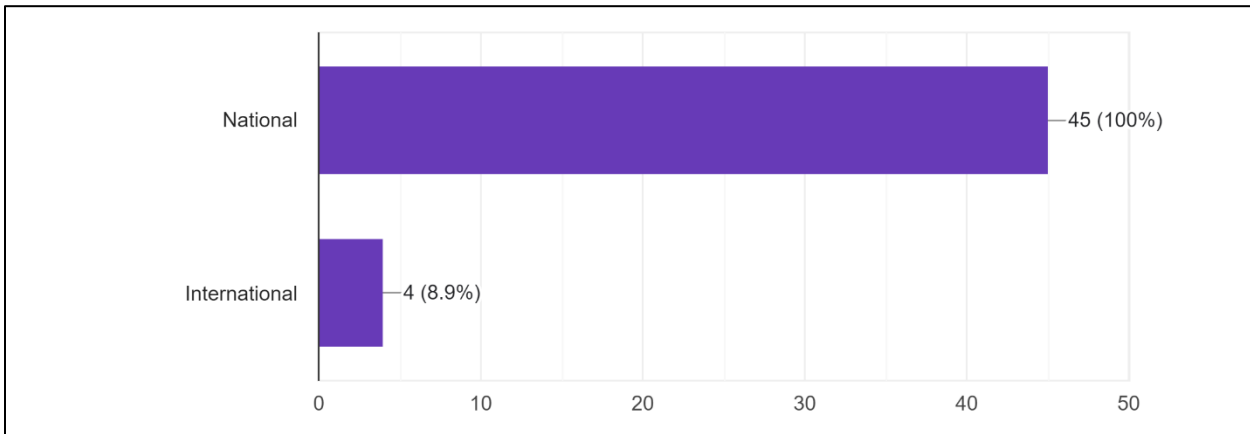
In this chapter the responses to the questionnaire are analyzed. A total of 45 seed companies responded. First the survey analyzes the participating seed companies, i.e. their focus crops, produced seed classes, targeted markets, and size. Next, it looks at their perspectives on seed sector development, and explores their interest in and ideas for the services of SEEDAN. The current performance of the association is evaluated. The final part looks at the future: what are their suggestions for SEEDAN’s priority activities and focus areas.

**2.1 Seed Entrepreneur Organizational Categories and Market Activities:**

Of the 45 seed companies who returned the questionnaire, 36 indicated to focus on cereals and legume crops, and 10 on vegetables. 18 (40%) produce their own Early Generation Seed (EGS); see figure 1. All companies are active in the Nigerian market; while 4 (9%) of them are also active internationally; see figure 2.



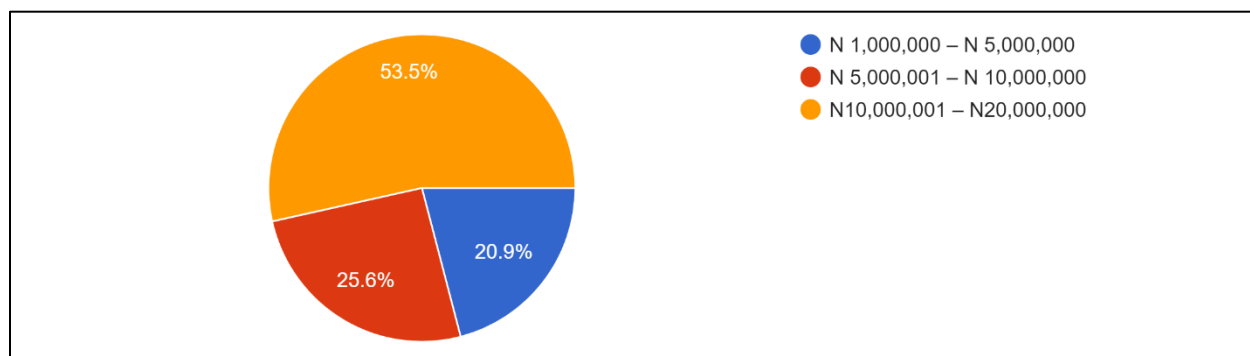
**Figure 1:** Organizational categories of seed entrepreneurs – 45 responses



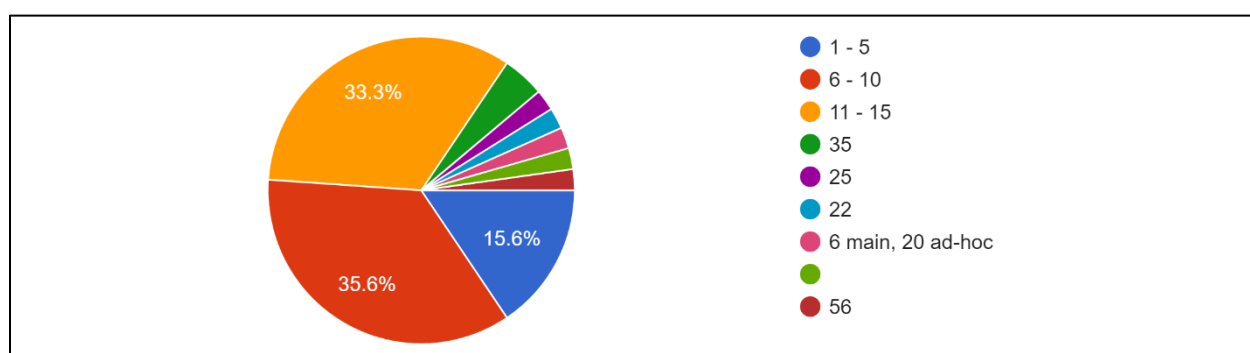
**Figure 2:** Seed entrepreneur focus on national and/or international markets – 45 responses

## 2.2 Financial and Employee Metrics of Seed Entrepreneurs:

To get an idea of company size the survey also asked for the companies' annual turn-over as well as number of employees; see figure 2 and 3. 9 respondents (21%) have an annual turnover of 1-5 mln NGN, whereas 11 (26%) have an annual turnover of 5-10 mln NGN. The largest number in falls in the category of 10-20 mln NGN annual turnover; see figure 3.



**Figure 3:** Yearly turnover of seed companies – 43 responses



**Figure 4:** Number of employees of seed companies – 45 responses

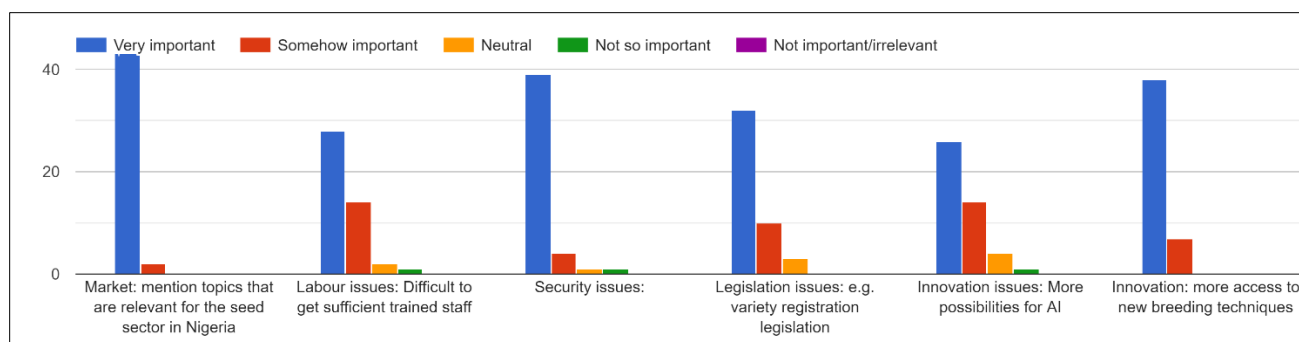
From the pie chart above in figure 4, it is visible that the number of employees varies, with 1-5 employees reported by 7 (16%); 6-10 employees by 16 (36%), and 11-15 employees by 15 (33%) seed companies. Additionally, 2 companies had 35 employees (4%); 1 had 25 (2%), and another had 22 (2%). One company reported having 6 main employees and 20 ad-hoc staff (2%).

## 2.3 Relevant sector developments:

The survey also tried to capture the companies' perspectives on the importance of several developments in the sector. Perspectives on the market, labour, security, legislations, innovation, and access to new breeding techniques were captured in the questions; see figure 5.

### **Market:**

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.



**Figure 5:** Relevance of different development in the sector (market; labour; security; legislation; innovation; breeding techniques)

### **Labour Issues:**

Labour issues were considered very important (28 responses) to somehow important (14 responses) suggesting 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:**

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:**

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:**

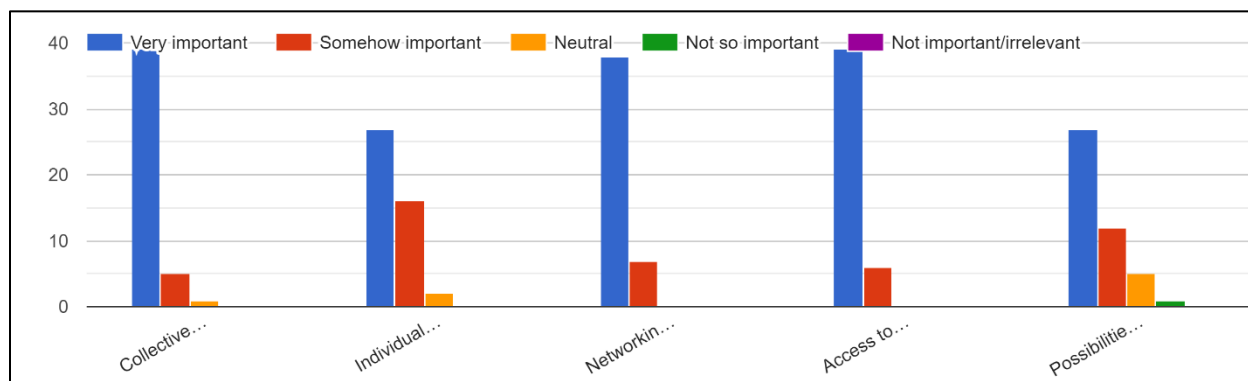
Also innovation issues are considered very important (26 responses) suggesting the importance given to the role innovation plays in the seed sector. This could involve technological advancements, research, and development, or the adoption of new practices to enhance seed production.

### **Access to New Breeding Techniques:**

The 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.

## 2.4 Membership Interest:

Next the survey looked into the reasons of companies for being a member of SEEDAN; what do they consider important. Issues considered included: collective advocacy, individual support, networking/meeting platform, access to knowledge, and participation in committees; see figure 6.



**Figure 6:** Relevance of different seed association services (collective advocacy; individual support; networking/meeting platform; access to knowledge; participation in committees)

### **Collective Advocacy:**

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.

### **Individual Support:**

While not considered as critical as collective advocacy, the acknowledgment of individual support a very important (27 respondents) to somehow important (16 responses) indicates the need for personalized assistance within the association. This could involve tailored support for specific challenges faced by individual members.

### **Networking/Meeting Platform:**

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.

### **Access to Knowledge:**

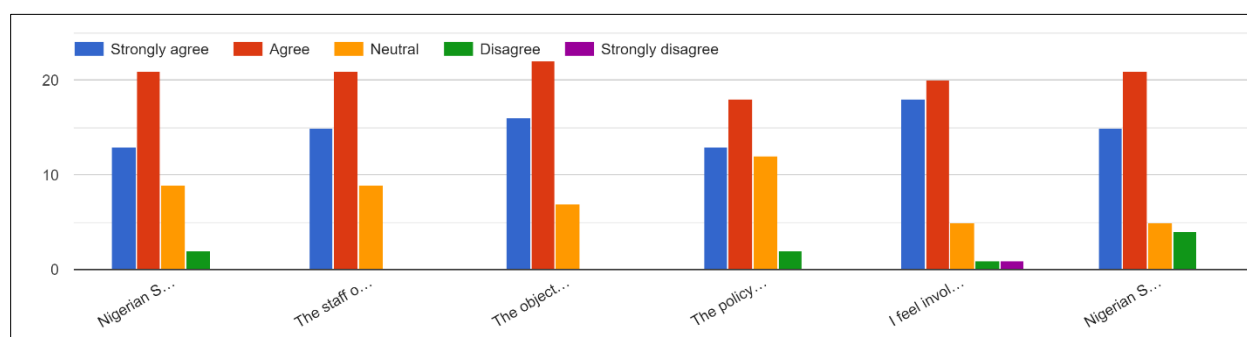
The unanimous agreement on the very high importance of access to knowledge (39 responses) highlights the priority placed on information and learning within the association. This could involve sharing industry insights, updates on regulations, and best practices to enhance the knowledge base of members.

### **Participation in Committees:**

The very high to medium importance given to participation in committees (27 and 12 responses, respectively) suggests that respondents are willing to be actively involved in specialized committees. Most companies clearly see it as a valuable engagement opportunity.

## **2.5 Performance of Seed Entrepreneurs Association of Nigeria:**

The survey assessed seed companies' opinion on the performance of SEEDAN (see figure 7), including the question if they would advise other seed companies to become a member (see figure 8).



**Figure 7:** Opinion on SEEDAN's performance (pro-active; professional staff; clear objectives; innovative policy; member involvement; understanding member needs)

### **Proactive:**

The agreement that SEEDAN is proactive (22 responses) indicates a generally 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.

### **Professional Staff:**

A similar scoring is visible regarding SEEDAN's staff with agreement on their professionalism (22 responses) reflecting satisfaction with the competence and conduct of the association's personnel. This generally positive perception suggests that members feel confident in the expertise and professionalism of the staff.

### **Clear Objectives:**

The agreement that SEEDAN has clear objectives (23 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 SEEDAN's efforts.

### **Innovative Policy:**

The agreement on NSTA having innovative policies (18 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.

### **Member Involvement:**

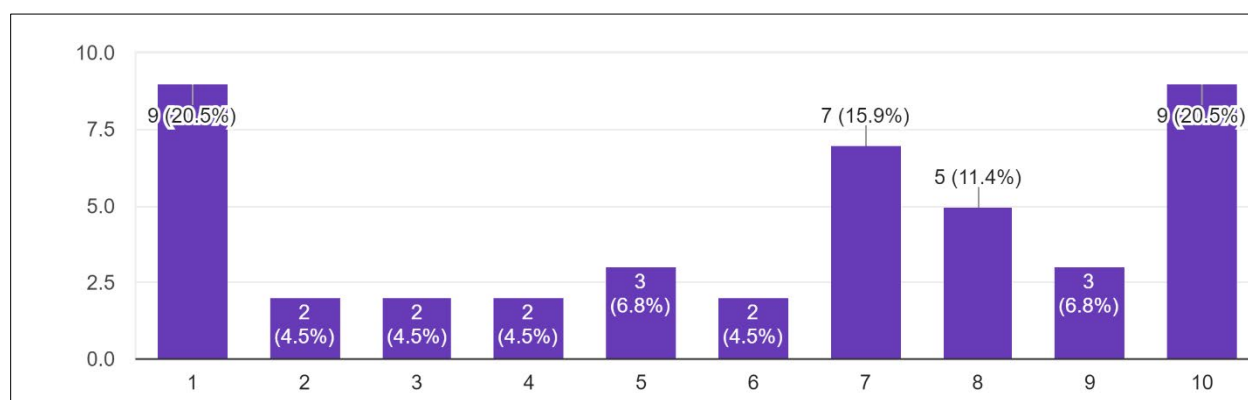
Also on member involvement there is strong to general agreement (18 and 20 responses) indicating satisfaction among respondents regarding the level of engagement and participation of members within SEEDAN. This suggests members feel they are able to actively contribute to the association's activities.

### **Understanding Member Needs:**

The agreement that SEEDAN understands member needs (22 responses) reflects a positive perception that the association is attuned to the requirements and challenges faced by its members. This suggests that the association takes member feedback into account when shaping its policies and initiatives.

### **Recommendation SEEDAN membership:**

On the question 'Would you advise a seed company to become a member of SEEDAN' opinions of respondents are divided; see figure 9.: The average score on a scale from 1-10 (definitely no-definitely yes) was 5.9. This suggests a moderately positive sentiment among respondents regarding recommending SEEDAN membership. This indicates that while there is a favorable opinion, it might not be an overwhelmingly strong endorsement. Members see value in the association but might also recognize areas where improvement is possible.



**Figure 8:** Recommendation to become a SEEDAN member – 44 responses. Scoring scale 1-10 (definitely no-definitely yes)

## **2.6 Offer and contributions:**

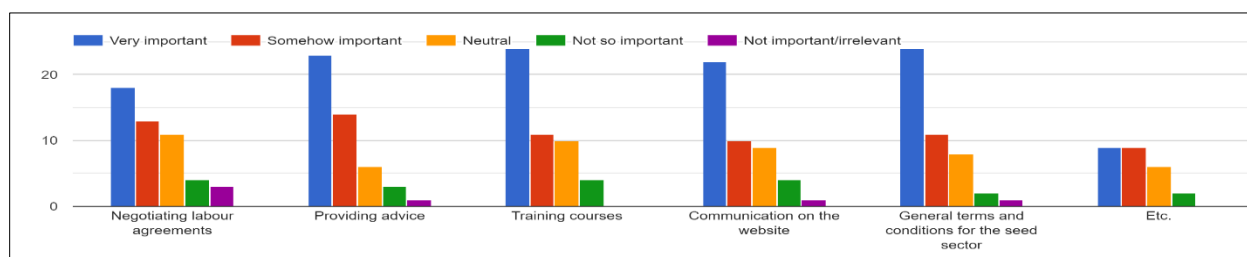
The survey asked for the importance of SEEDAN's services for your company. It looked at various aspects: (i) negotiating labour agreements; (ii) providing advice; (iii) training courses; (iv) communication on the website; (v) general terms and conditions for the seed sector; (vi) other services. Find the scoring in figure 9. It also requests the opinion on the level of financial contribution requested; see figure 10.

### **Negotiating Labor Agreements:**

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.



**Figure 9:** Importance of SEEDAN's services (negotiating labour agreements; providing advice; training courses; communication on the website; general terms and conditions for the seed sector; other services

### ***Providing Advice:***

The high number of "very important" responses (23) suggests that members highly value receiving advice from SEEDAN. 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.

### ***Training Courses:***

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.

### ***Communication on the Website:***

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.

### ***General Terms and Conditions for the Seed Sector:***

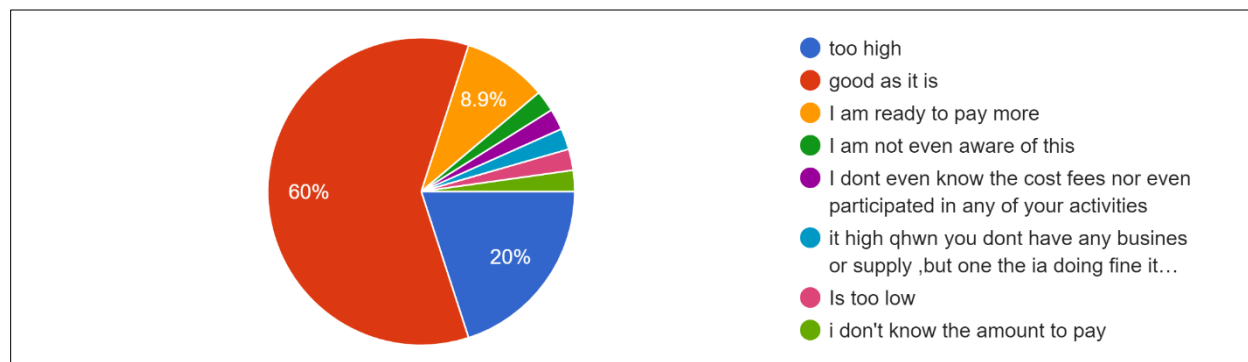
The unanimous agreement on the very high importance of general terms and conditions for the seed sector (24 responses) underscores the necessity for clear and standardized guidelines within the industry. Members highly prioritize the establishment of consistent practices, regulations, and quality standards.

### ***Other Services:***

The "etc." category with 8 responses for both very and moderately important shows 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.

### Contribution fees:



**Figure 10:** Opinion on amount of contribution fees requested - 45 responses

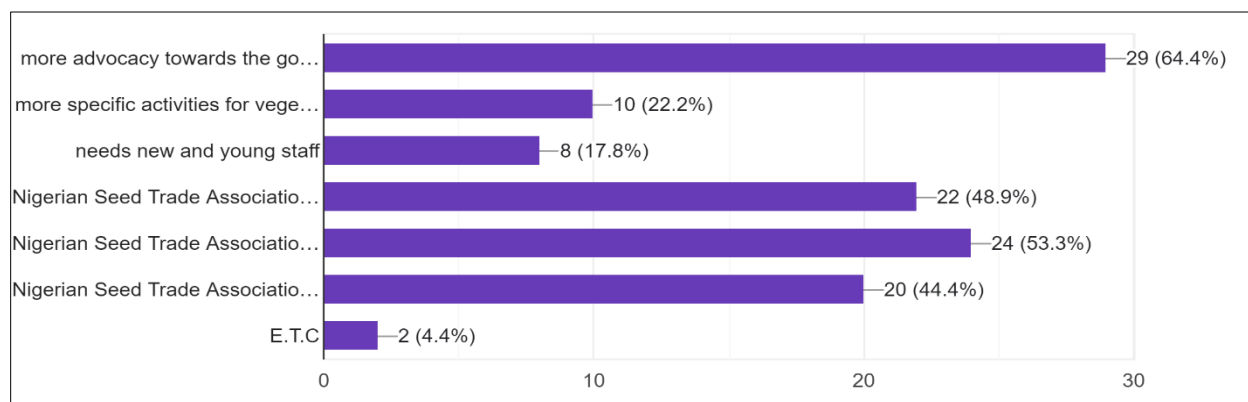
The opinion of the contribution fees of SEEDAN varies:

- *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.
- *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.
- *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.
- *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.
- *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.

## 2.7 Future Activities of SEEDAN:

In the survey seed companies were asked to evaluate ideas for future activities of SEEDAN. Several options were provided, and respondents were asked to select the two or max three most relevant ones for their company; see figure 11. The options were the following: (i) more advocacy towards

the government; (ii) more specific activities for vegetables; (iii) needs new and young staff; (iv) association should create committees/working groups for people with equal interests; (v) association should do more on communication; (vi) association should collect more data on the sector; (vii) additional ideas.



**Figure 11:** Opinion on amount of contribution fees requested - 45 responses (more advocacy towards the government; more specific activities for vegetables; needs new and young staff; association should create committees/working groups for people with equal interests; association should do more on communication; association should collect more data on the sector; additional ideas.)

#### ***More Advocacy Towards the Government:***

The majority of respondents strongly advocate for more engagement in advocacy efforts toward the government, with the highest score of all options (29 times prioritized). 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.

#### ***More Specific Activities for Vegetables:***

A significant portion of respondents (10 times prioritized) express the need for more specific activities focused on vegetables; it is topic number 5 on the list. This indicates a recognition among members of the importance of tailored initiatives and strategies for the vegetable segment of the seed sector. The response rate suggests that while not a unanimous sentiment, there is a notable interest in specific interventions related to vegetable seed activities.

#### ***Needs New and Young Staff:***

The response indicating the need for new and young staff (8 times prioritized) suggests that a portion of respondents feels they would benefit if the association supports engagement of youth in seed business, making it an attractive employment opportunity. This may be supported in several ways.

***Should Create Committees/Working Groups for People with Equal Interests:***

The significant response (22 times prioritized) 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.

***Association Should Do More on Communication:***

The key response advocating for increased efforts in communication (24 times prioritized) 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 score reflects a widespread desire for improved communication practices.

***Association Should Collect More Data on the Sector:***

The response indicating the need for collecting more data on the sector (20 times prioritized) 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.

***Other ideas:***

The "etc." category with a score of 2 times prioritized, suggests that two respondents provided additional suggestions not explicitly listed in the options. This underscores the diversity of perspectives within the association.

**2.8 Chosen Focus Areas for the Coming Years:**

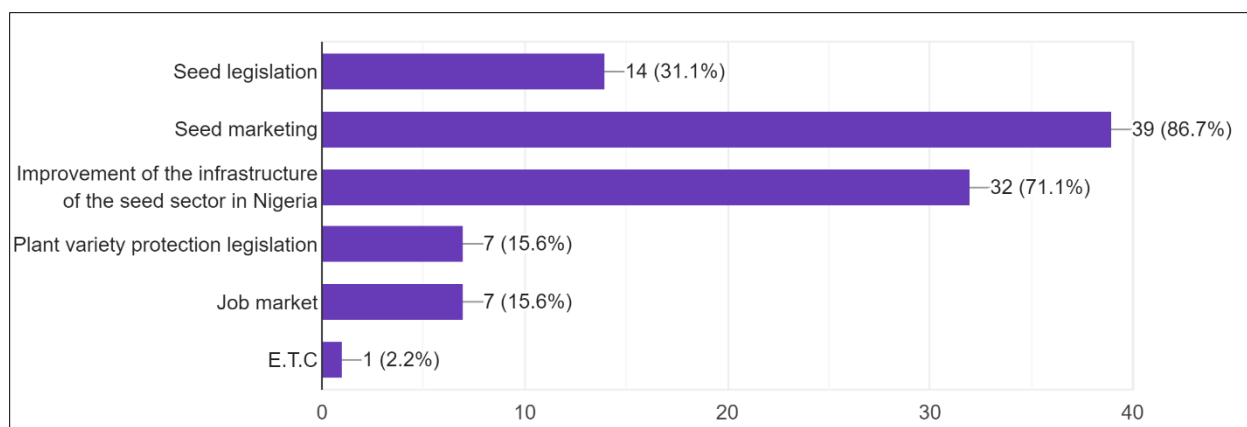
The survey provided a number of options for topics that SEEDAN should prioritize for the coming years. These included: (i) seed legislation; (ii) seed marketing; (iii) improvement of the infrastructure of the seed sector in Nigeria; (iv) Plant variety protection legislation; (v) Job market; (vi) Etc. Respondents were asked to indicate two.

***Seed Legislation:***

The response indicating the importance of seed legislation (14 times prioritized) 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.

***Seed Marketing:***

The overwhelming response (highest priority with a score of 39) 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.



**Figure 12:** SEEDAN's focus areas for the coming years – 45 responses (seed legislation; seed marketing; improvement of the infrastructure of the seed sector in Nigeria; plant variety protection legislation; job market; other).

#### ***Improvement of the Infrastructure of the Seed Sector in Nigeria:***

The high response rate (second highest priority with a score of 32) 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.

#### ***Plant Variety Protection Legislation:***

The response indicating the importance of plant variety protection legislation (seven times prioritized) 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.

#### ***Job Market:***

The response focusing on the job market (7 times prioritized) 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.

#### ***Other ideas:***

Only one person provided an additional focus area or suggestion. So it seems the above focus areas have been well chosen.

## **2.14 Conclusion**

The survey concluded with asking the respondents what they think is the most important topic SEEDAN should work on in the coming years; as well as providing any final comments or remarks. See the responses below.

***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 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.

***Final Comments or Remarks:***

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

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