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NORTHERN GHANA SEED VALUE CHAIN GAP ANALYSIS - FINDINGS

Northern Ghana Seed Platform Launch | UDS – ICC, Dungu – Tamale | April 15th, 2016



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OBJECTIVES OF THIS STUDY

- To establish a data base of available seeds (maize, rice & soy) across the value chain from 2010 - 2015.
- To establish possible gaps within the value chain (breeder, foundation & certified seeds) and from production - sales.
- To establish possible gaps between quantities demanded and quantities supplied.
- To make projections for 40% certified seed coverage by 2018 in northern Ghana.



METHODOLOGY

Questionnaires administered to the following groups:

- ✓ **Breeders of maize, soy and rice in SARI and CRI**
- ✓ **GLDB**
- ✓ **GSIU offices in the three regions (N/R, UE/R and UW/R)**
- ✓ **Major registered agro dealers in the three regions**
- ✓ **Large seed producers in the three regions**



CHALLENGES IN DATA COLLECTION

- ❖ **Poor record keeping at all levels of value chain**
- ❖ **Lukewarm attitudes of individuals towards the study**
- ❖ **Short period within which the study was conducted**



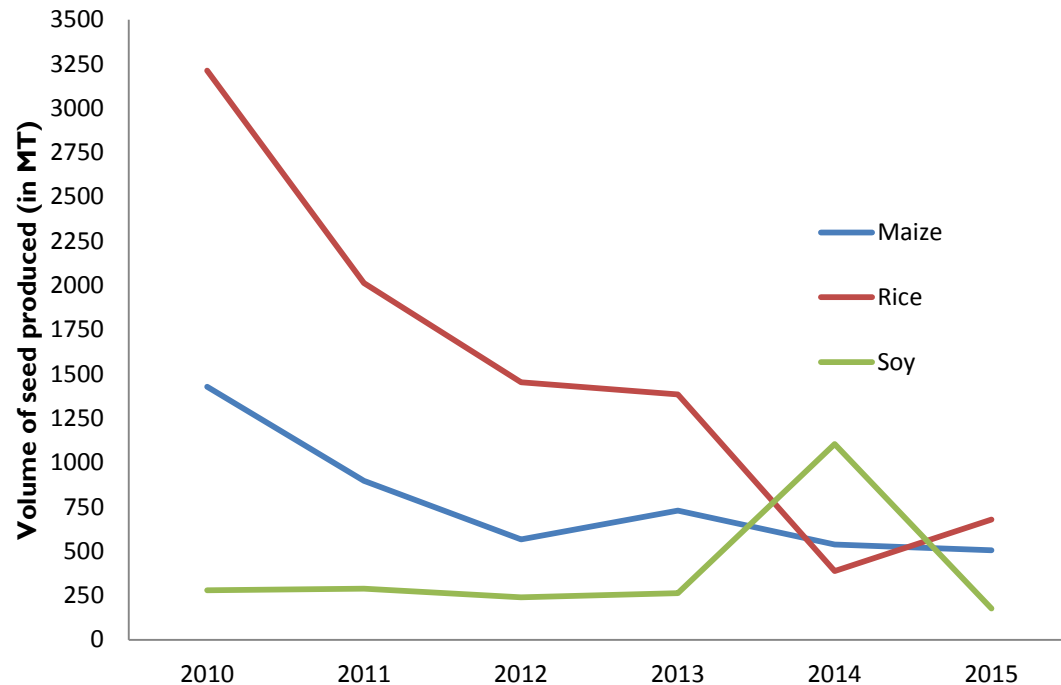
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Findings



I. Certified seed production and sales in three Northern regions of Ghana



- Upper west region all seed produced sold (100%)
- UE/R & N/R have carry overs

Seed production

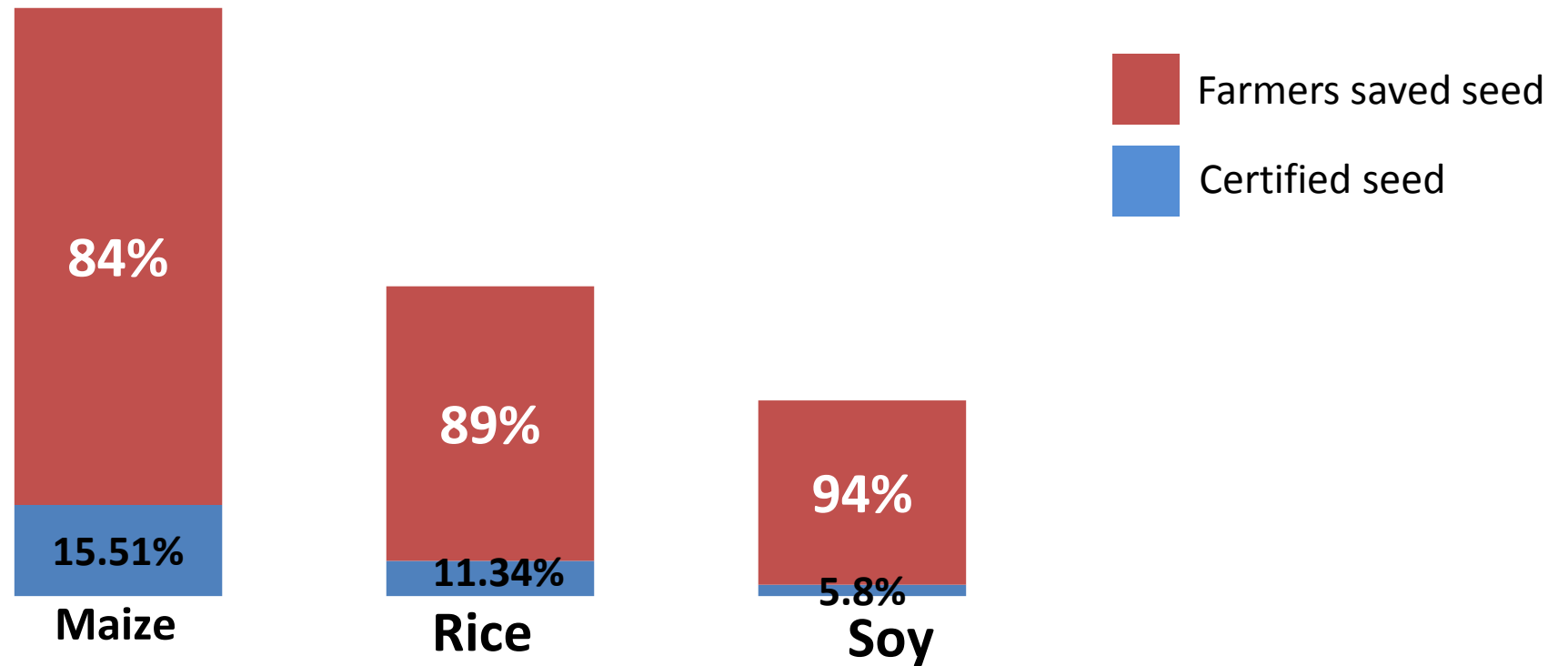
| Year | Maize | Rice | Soy |
|--------------|----------------|----------------|----------------|
| 2010 | 1428.49 | 3212.18 | 279.56 |
| 2011 | 898.27 | 2013.64 | 289.96 |
| 2012 | 568.155 | 1453.35 | 240.68 |
| 2013 | 729.225 | 1385.41 | 264.49 |
| 2014 | 537.81 | 388.89 | 1105.27 |
| 2015 | 506.12 | 679.8 | 176.77 |
| Total | 4668.07 | 9133.27 | 2356.72 |

Carry over seed

| Year | Maize | Rice | Soy |
|--------------|---------------|---------------|--------------|
| 2010 | 44.53 | 494.07 | 29.70 |
| 2011 | 121.10 | 155.90 | 11.00 |
| 2012 | 9.72 | 15.20 | 0.00 |
| 2013 | 45.63 | 308.08 | 0.00 |
| 2014 | 14.83 | 0.00 | 40.03 |
| 2015 | | | |
| Total | 235.81 | 973.25 | 80.73 |
| Carry over % | 5.7 | 11.5 | 3.7 |



MAIZE, RICE & SOY: CERTIFIED SEED AND FARMERS SAVED SEED BASED ON CROPPED AREA FOR THE THREE NORTHERN REGIONS (ACRES)





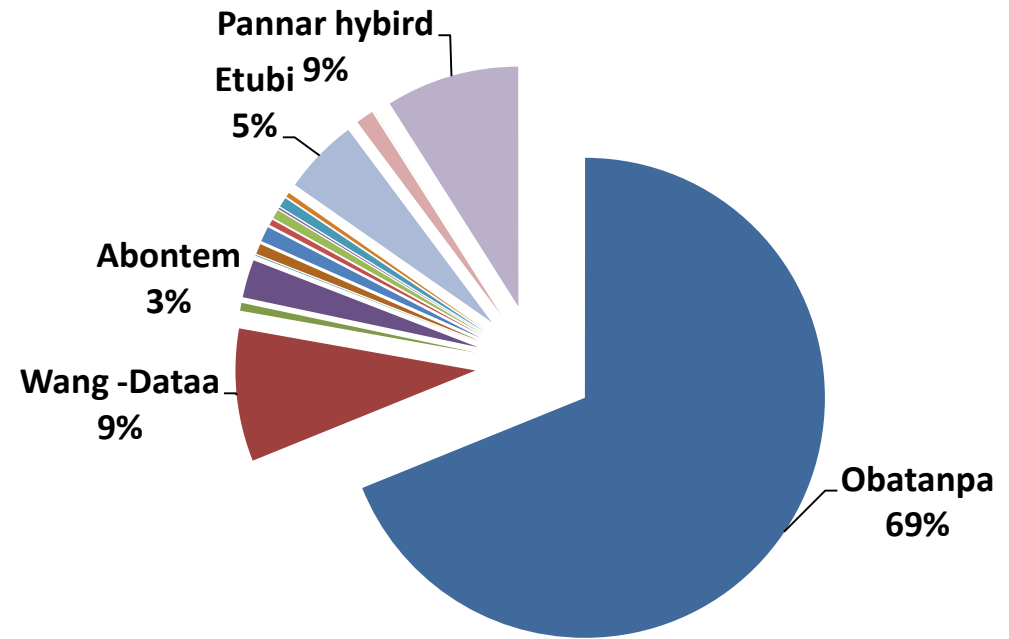
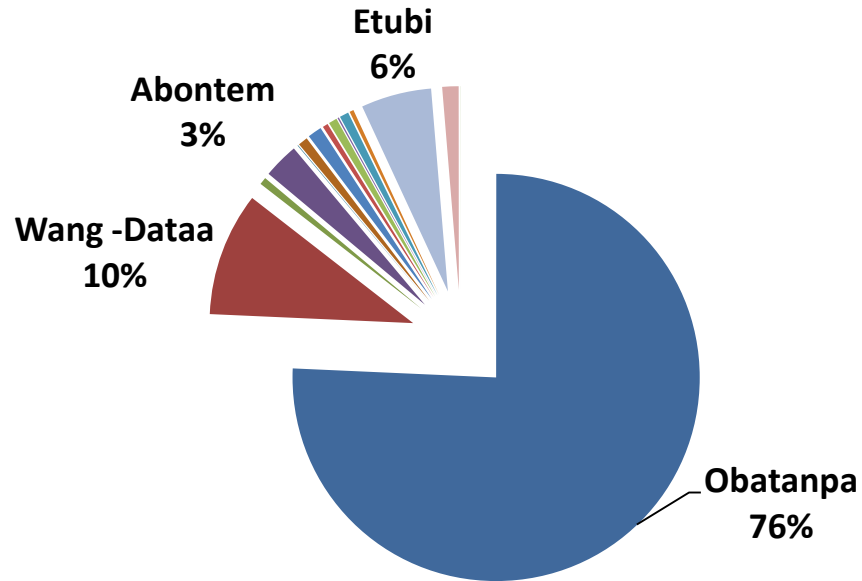
MAIZE | Cropped area in SADA zone (Acres)

| REGION | MAIZE –Total Area | Potential Area under certified seed (15.5%)* | Area under Farmer Saved Seed |
|--------------|-------------------|--|------------------------------|
| NORTHERN | 336,807.5 | 14,830 | 321,977.5 |
| UPPER WEST | 168,375 | 35,684.4 | 132,690.6 |
| UPPER EAST | 108,425 | 5,720.6 | 102,704.4 |
| PANNAR | - | 38,889 | - |
| TOTAL | 613,607.5 | 95,142 | 557,372.1 |





Improved maize varieties coverage in three northern regions of Ghana (2010-2015)



- Obatanpa
- Wang -Dataa
- Sanzal-Sima
- Abontem
- Bihilifa
- Dorke
- Ewul boyu
- Aburohema
- Omankwa
- Golden Jubilee
- Akposoe
- SP
- Etubi
- Mamaba
- Tintim

Without Pannar hybrid

With Pannar hybrid



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Altogether 13 OPV maize and 5 hybrids maize





RICE | Cropped area in SADA zone (Acres)

| REGION | Rice –Total Area | Potential Area under certified seed (11.34%) | Area under Farmer Saved Seed |
|--------------|------------------|--|------------------------------|
| NORTHERN | 183,472.5 | 32,620 | 150,852.5 |
| UPPER WEST | 12,070 | 1370 | 10,700 |
| UPPER EAST | 127,700 | 2656 | 125,044 |
| TOTAL | 323,242.5 | 36,646 | 286,596.5 |





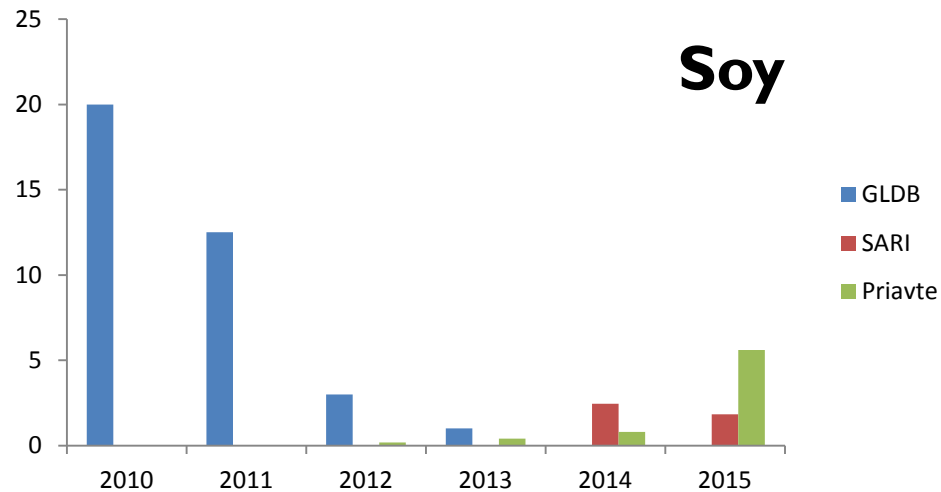
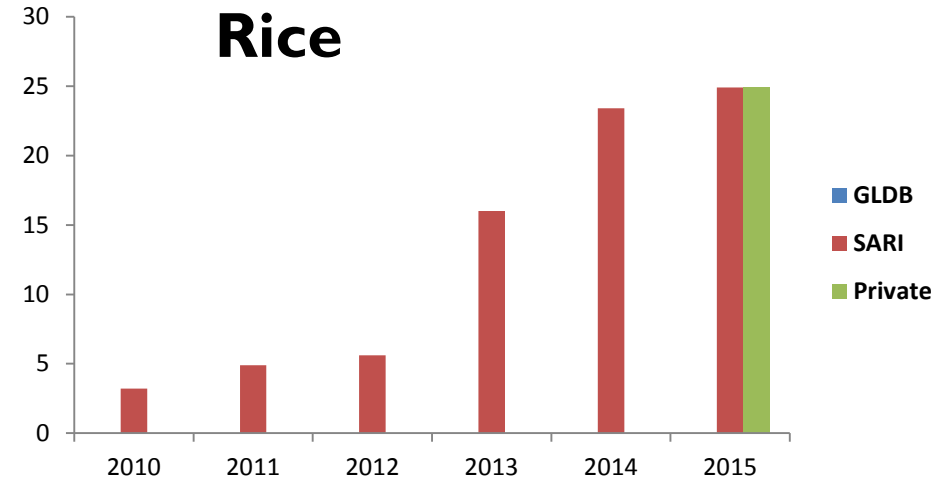
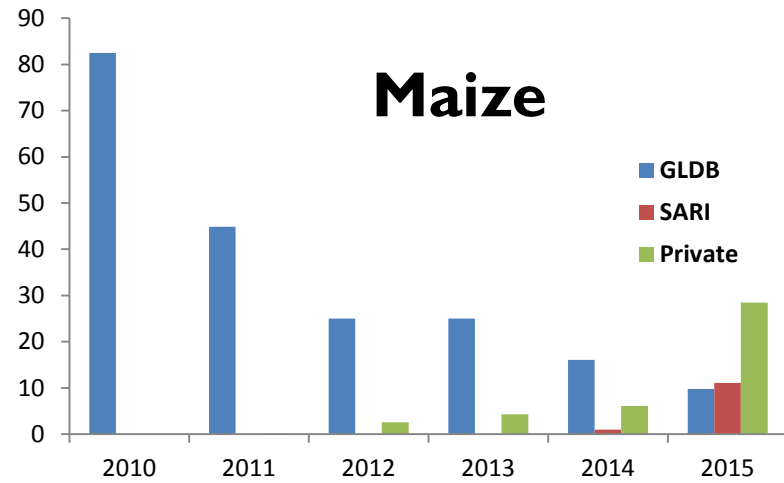
SOY | Cropped area in SADA zone (Acres)

| REGION | Soy –total area | Potential Area under certified seed (5.78%) | Area under Farmer Saved Seed |
|--------------|------------------|---|------------------------------|
| NORTHERN | 151,077.5 | 6,867 | 144,210.5 |
| UPPER WEST | 13,850 | 4,746 | 9,104 |
| UPPER EAST | 39,075 | 171 | 38,904 |
| TOTAL | 204,002.2 | 11,885 | 192,218.5 |
| | | | |





2. Foundation seed production (in MT)



Private seed producers progressively taking charge of foundation seed production from 2012



3. ATT's 40% Target by 2018 in SADA zone (Acres)

| REGION | Total Cropped Area in Northern Ghana | ATT Targeted cropped area under certified seed – 40% (acres) | ATT 40% Targeted Certified Seed Usage by 2018 (ton) |
|--------------|--------------------------------------|--|---|
| MAIZE | 613,607.50 | 245,443 | 2,209 |
| RICE | 323,242.50 | 129,297 | 2,586 |
| SOYBEAN | 204,002.50 | 81,601 | 1,224 |
| TOTAL | 1,140,852.50 | 456,340.9 | 6,019 |

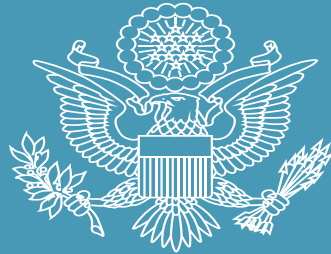




SEED ROAD MAP TO ACHIEVE 40% TARGET (MT)

| | 2016 | | | 2017 | | | 2018 | | |
|---------|---------|------------|-----------|---------|------------|-----------|---------|------------|-----------|
| Crop | Breeder | Foundation | Certified | Breeder | Foundation | Certified | Breeder | Foundation | Certified |
| Maize | 1 | 20 | 600 | | 35 | 1200 | | | 2200 |
| Rice | 2 | 45 | 1000 | | 65 | 1800 | | | 2600 |
| Soybean | 1.5 | 20 | 100 | | 36 | 500 | | | 1200 |





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