A snapshot of maize seed sales in Kenya

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Focus of the presentation

- How much choices do farmers have in regard to maize varieties?

- What is sold where??

- Varietal stickiness

Zones and seed categorization for varietal distribution analysis

Zones categories – defined using GIS information

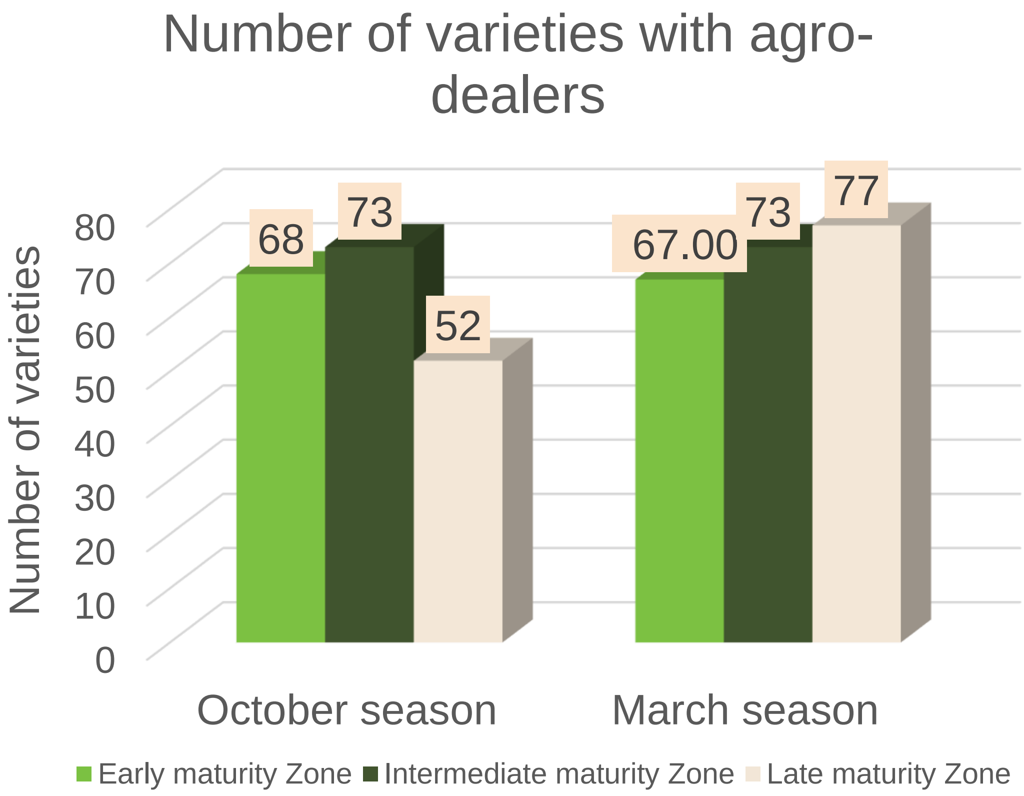
- PP1: Early maturity zones
  - Dry mid-altitude,
  - Wet lower mid-altitude
- PP2: Intermediate maturity zones
  - Wet upper mid-altitude
- PP3: Late maturity zones
  - Highlands

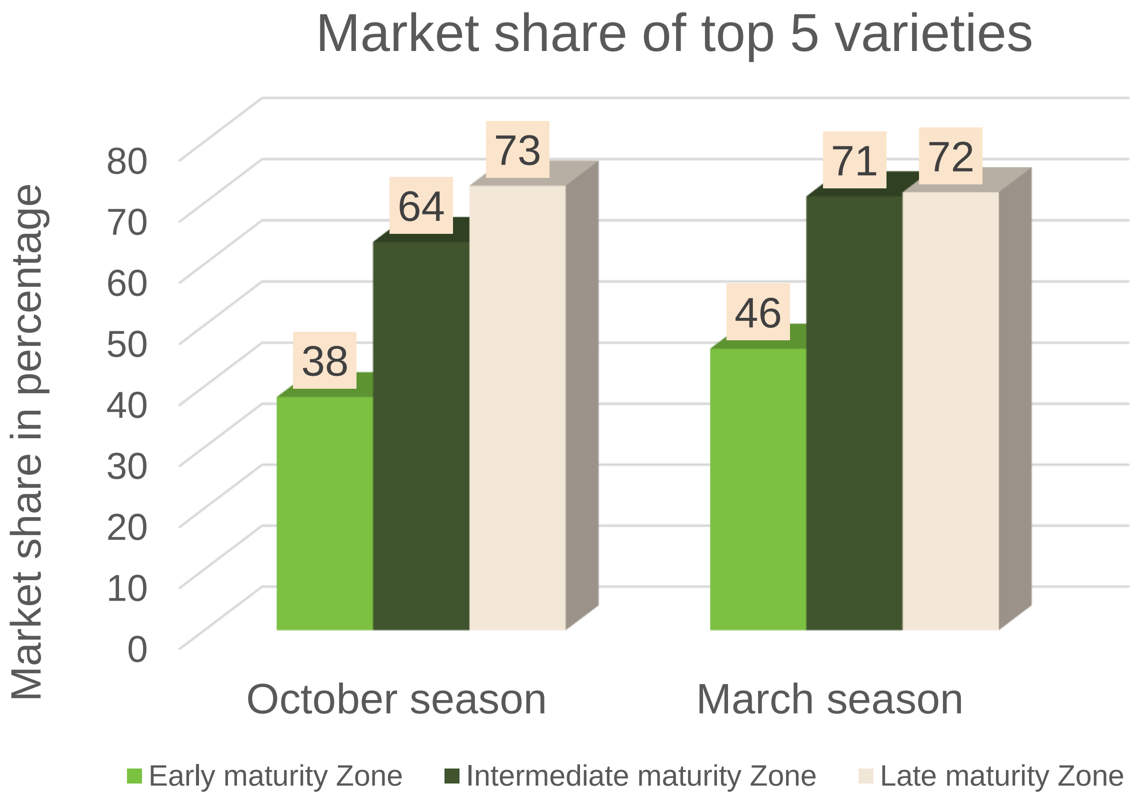
Seed categories – as defined by KEPHIS and seed companies

- Early maturing
- Intermediate maturing
- Late maturing

Overview: How much choice do farmers have between varieties?

Many varieties but lion's share goes to a few

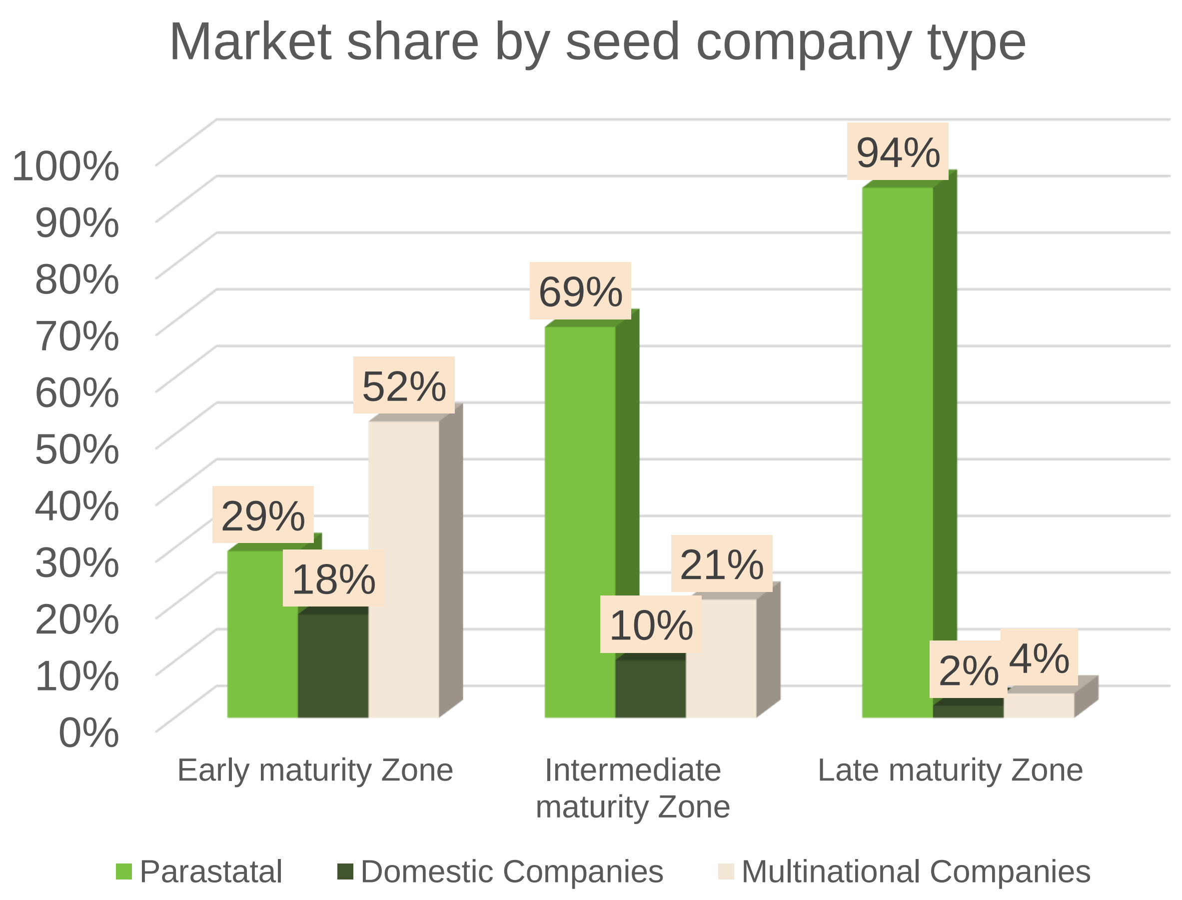




Average varieties at an agro-dealer shop??

- ADD THE SLIDE

Who owns the Kenya's maize seed market?



- 15 seed companies were captured:
  - 13 serving early and intermediate maturity zones
  - 12 serving late maturity zones
- Kenya seed has the lion's share – especially in intermediate and late maturity zones
- Multinationals lead in the early maturity zones
- Domestic companies' share is very low across all the zones

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What seed variety is sold where?

We see significant mix between zones and product profiles

	Early maturity zone (40% of maize area)	Intermediate maturity zone (38% of maize area)	Late maturity zone (22% of maize area)
Early maturing varieties	64%	28%	13%
Intermediate maturing varieties	30%	49%	45%
Late maturing varieties	6%	23%	42%

Market share of top varieties in early maturity area

Variety	Variety code	Age	Maturity level	% of agro-dealers stocking (in Early zone)	Market share (In Early Zones By Volume)
SC Duma 43	A	18	Early	68.80%	17.29%
DK 8031	B	18	Early	47.17%	8.35%
DH04	C	20	Early	42.63%	5.45%
Sungura 301	D	6	Early	34.52%	5.17%
H513	E	26	Intermediate	24.69%	5.03%
WH101 (HARAKA)	F	15	Early	20.27%	4.54%
DH 02	G	26	Early	42.75%	4.46%
PHB3253 (3253W)	H	25	Early	30.10%	3.82%
WH505	I	18	Intermediate	13.14%	3.67%
DK777	J	5	Intermediate	11.55%	3.16%

Market share of top varieties in intermediate maturity area

Variety	Variety code	Age	Maturity level	% of agro-dealers stocking (in Intermediate zone)	Market share (In Intermediate Zones By Volume)
H6213	A	19	Late	43.41%	20.71%
H513	B	26	Intermediate	40.78%	16.67%
H516	C	20	Intermediate	24.59%	16.43%
DK 8031	D	18	Early	28.73%	5.77%
H517	E	20	Intermediate	7.53%	5.18%
SC Duma 43	F	18	Early	39.27%	4.55%
DK777	G	5	Intermediate	30.74%	3.07%
H614D	H	35	Late	34.50%	2.22%
WH401	I	15	Intermediate	5.14%	2.10%
DK8033	J	17	Early	11.79%	2.04%

Market share of top varieties in late maturity area

Variety	Variety code	Age	Maturity level	% of agro-dealers stocking (in Late zone)	Market share (In Late Zones By Volume)
H629	A	21	Late	30.48%	15.79%
H513	B	26	Intermediate	35.61%	13.26%
H6218	C	12	Late	38.46%	12.73%
H6213	D	19	Late	59.54%	12.51%
H628	E	22	Late	27.92%	10.39%
H624	F	18	Late	46.72%	7.97%
H520	G	18	Intermediate	27.92%	5.77%
H614D	H	35	Late	37.61%	4.96%
H516	I	20	Intermediate	29.63%	3.79%
H517	J	20	Intermediate	11.40%	2.57%

Some insights into varietal stickiness and turnover issues

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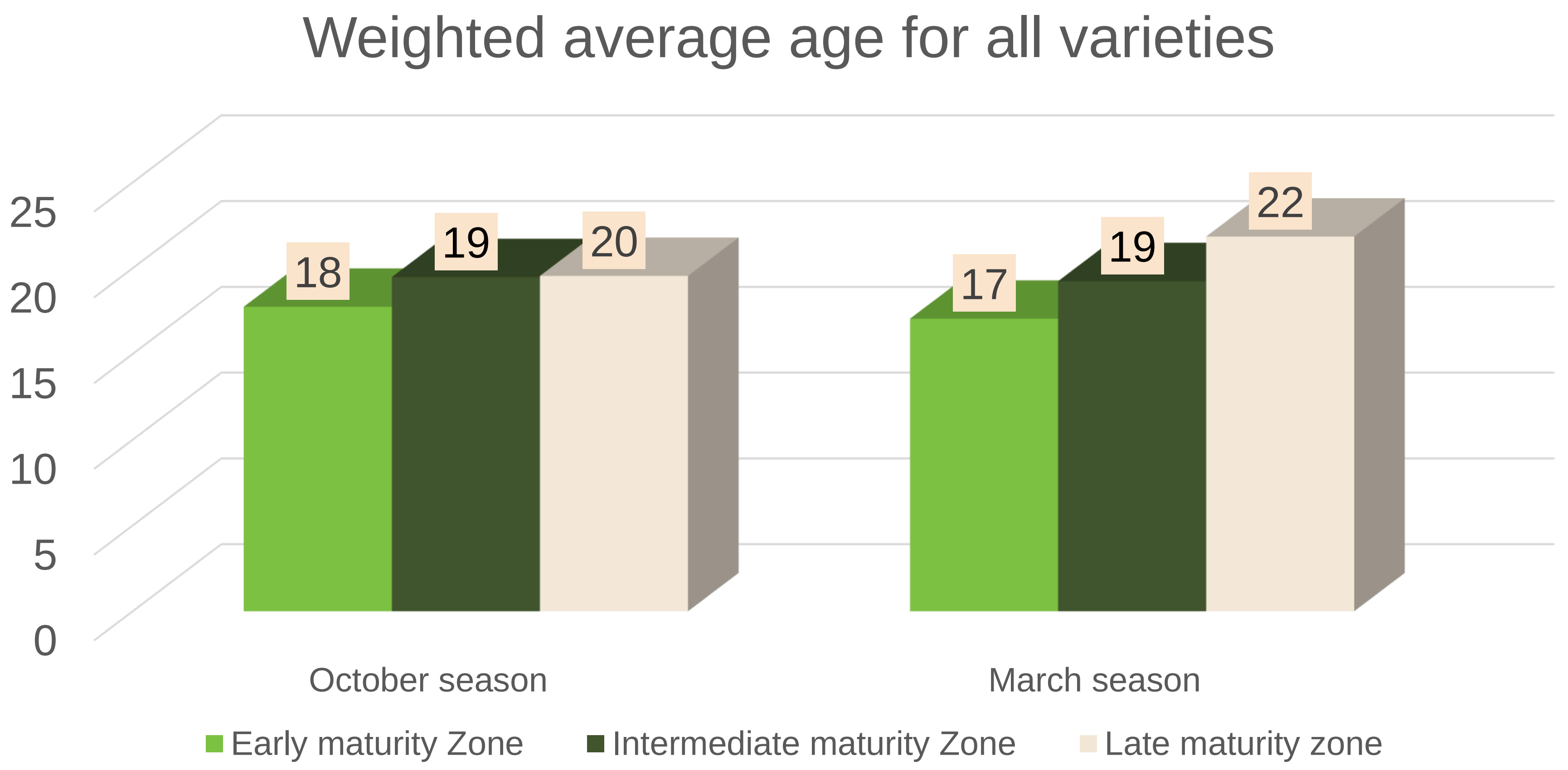
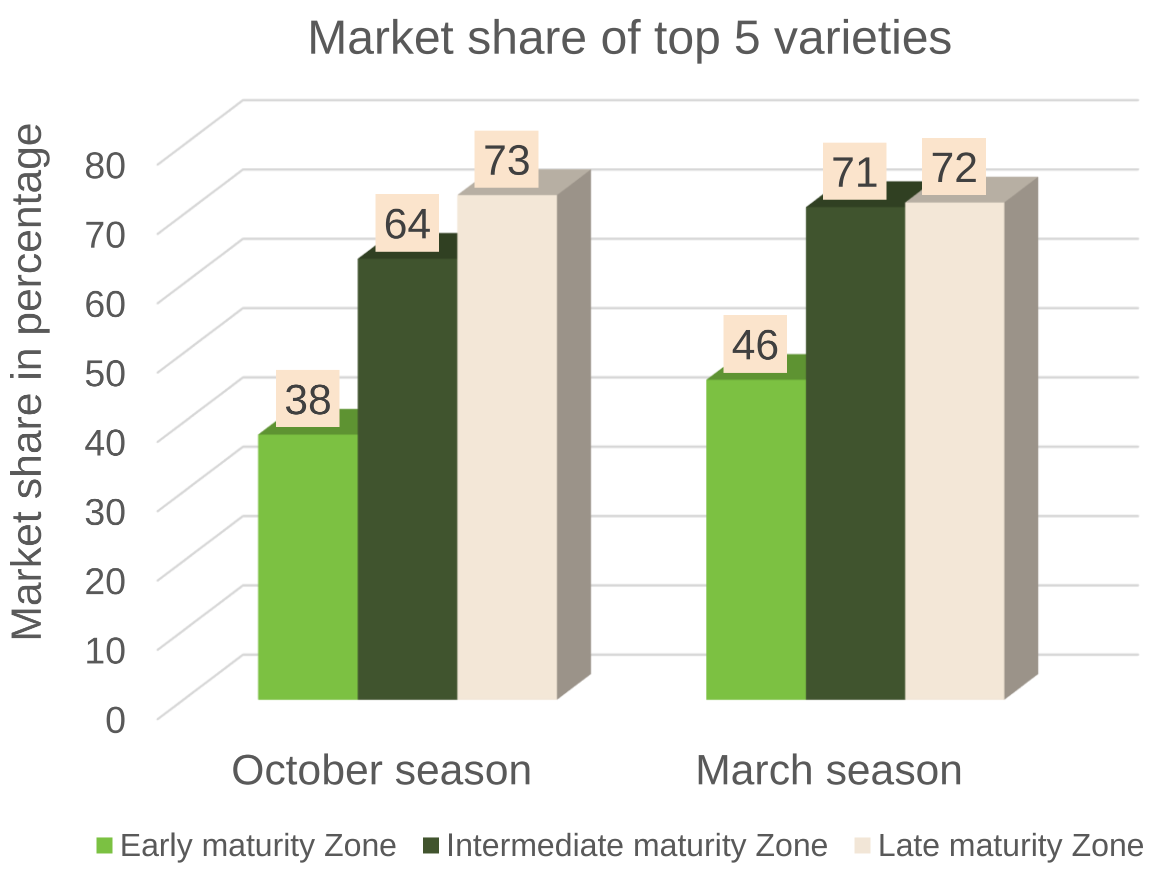
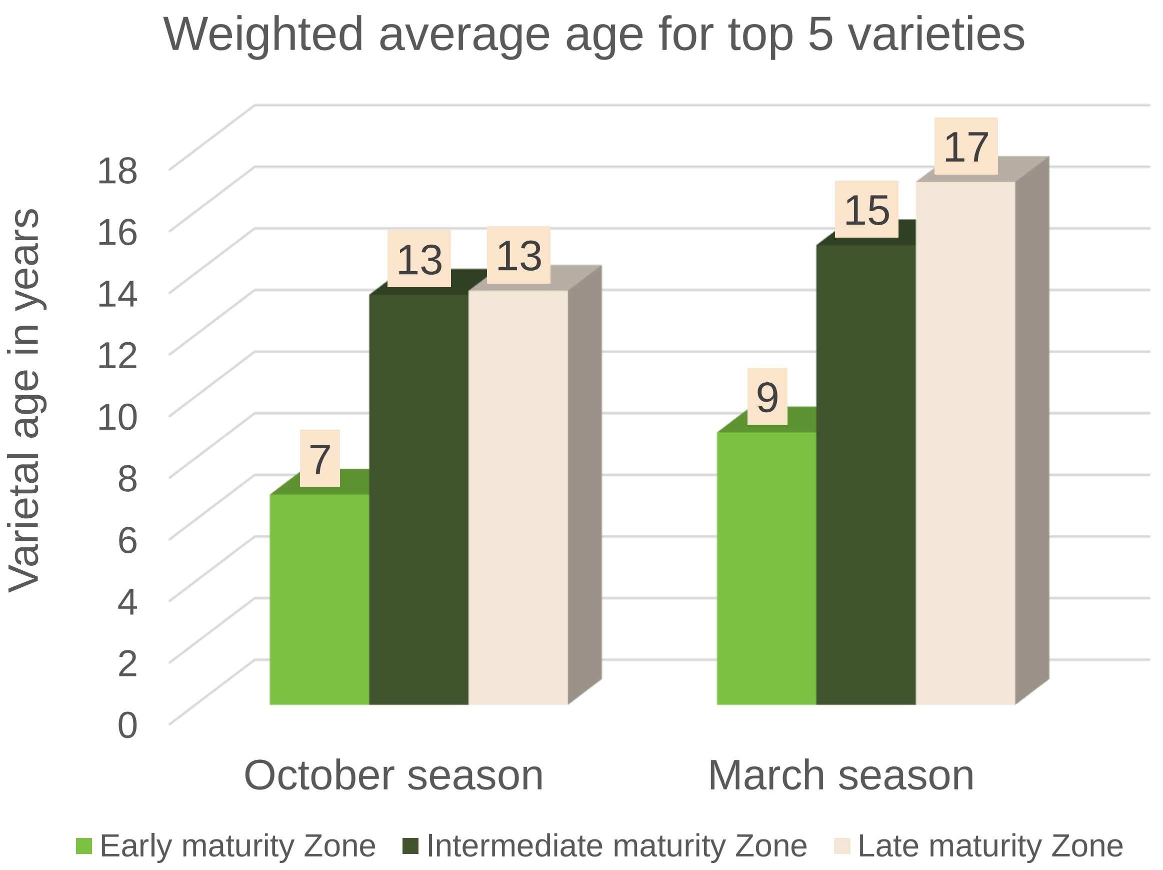
How old is what we sell?



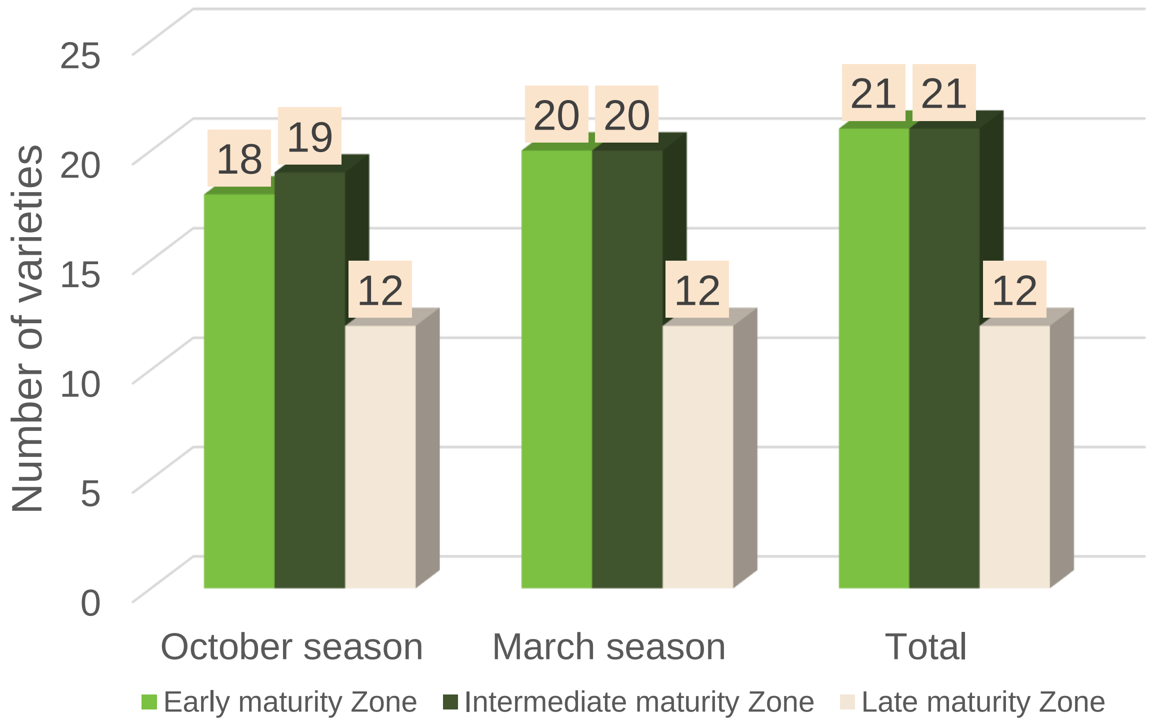
Market leaders are fairly old too



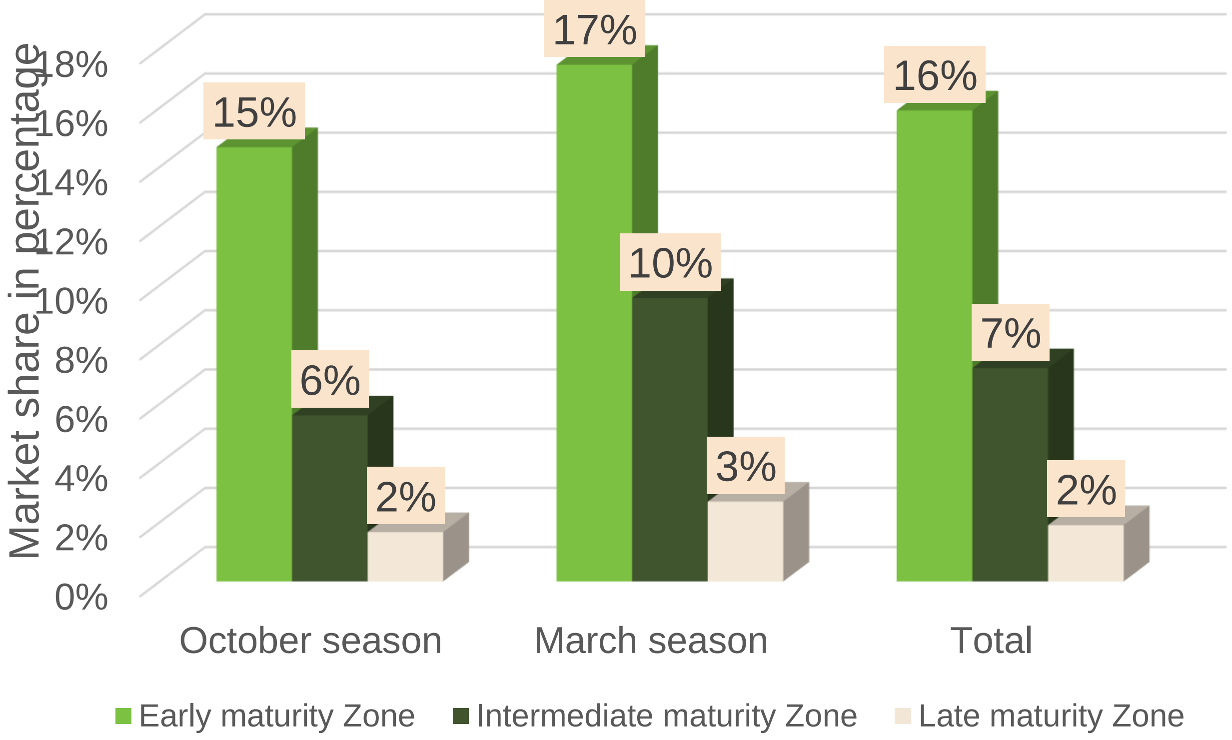


Number Vs Market Share of New Varieties

Panel A: Number of varieties released in the last TEN years



Panel B: Market share of varieties released in the last TEN years

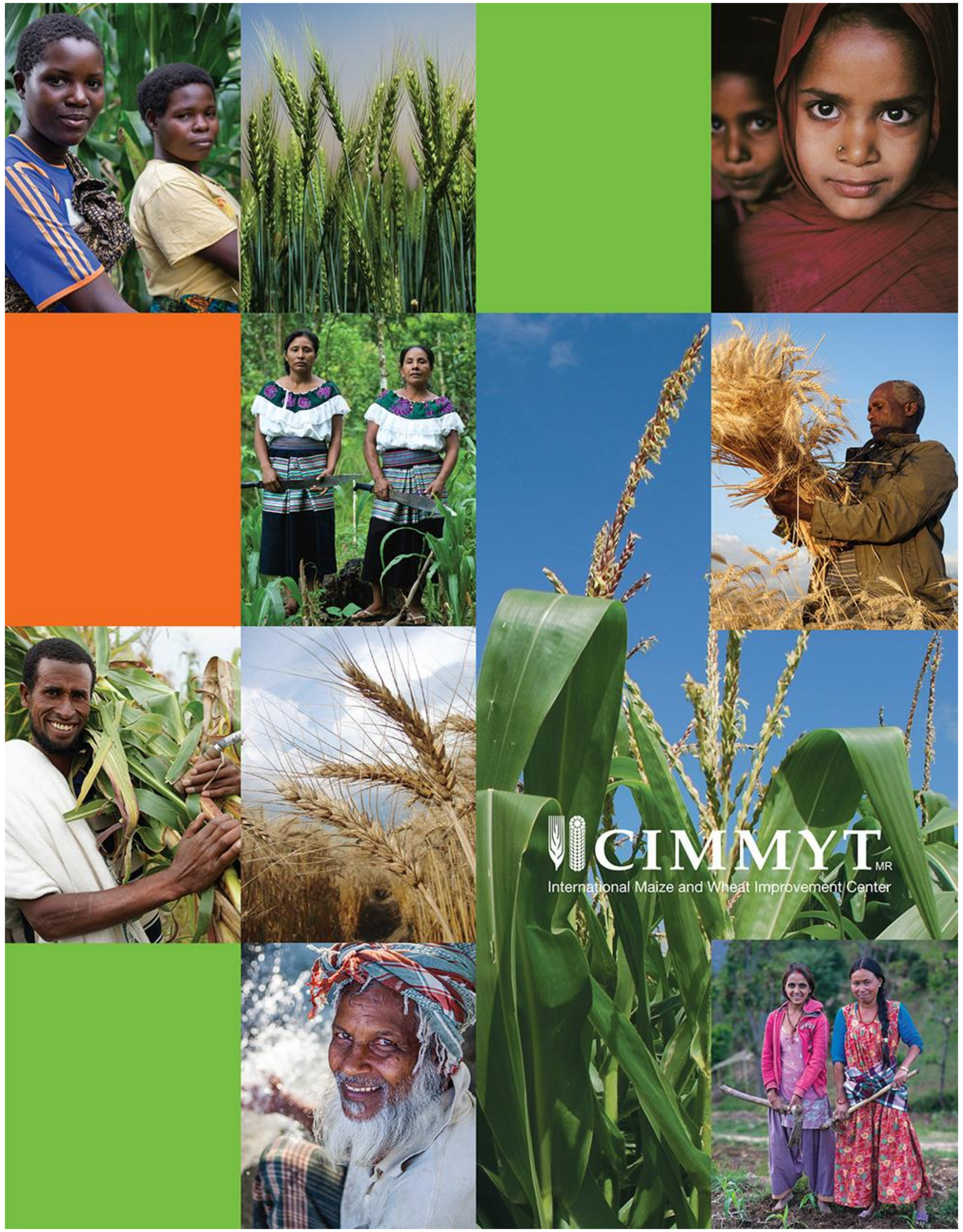


In conclusion, got some questions for you

- Is it true that we are pushing some early maturing verities in intermediate and LATE zones? If so why?

- Does varietal turn over matter to you – as a farmer, agro-dealer, seed company, GoK, etc?
  - If so, why?
  - If not, why?

- Do we have new ‘old’ varieties – time between year of release/licensing by KEPHIS to varietal commercialization (a commercially available product)?
  - What are the implications then on farmers benefiting from genetic gains from this varieties? Such gains may have been wiped out during the delay/waiting period.



Thank you for your interest!

Mike Ndegwa