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# How to accelerate South Sudan's transition from seed aid to seed market?

A Policy Brief based on a Research-led and Multi-stakeholder Workshop

held in Juba, South Sudan, on February 19, 2025





## Executive Summary

This policy brief outlines practical recommendations aimed at accelerating the transition of South Sudan's seed sector from reliance on seed aid, or free seeds distributed by humanitarian agencies, towards the development of a viable, inclusive and sustainable seed market.

Empirical research produced by KIT and IFDC – making use of the largest dataset available on South Sudanese farm-households – suggests that local seed companies have made significant progress in producing better-quality and higher-yielding seeds, as a result of the support they received by the A3SEED project, which is funded by the Embassy of the Kingdom of the Netherlands (EKN). In particular, on the basis of a randomized control trial (RCT), KIT and IFDC demonstrated that the seeds sold by local seed companies have the potential to double maize yields, in comparison to farmers' own recycled seeds and free seeds distributed by humanitarian agencies. However, the vast majority (95%) of seeds used by South Sudanese farmers are either locally recycled (over multiple years) or imported from abroad (through seed aid distribution channels), whereas seed production and commercialization by local seed companies remains negligible.

These research findings were presented and discussed at a multi-stakeholder workshop held in Juba on February 19, 2025. In particular, the participants - representing the government of South Sudan, international humanitarian agencies, local companies and associations – concluded that persistent challenges such as unfair competition from foreign seeds suppliers (especially from Uganda), the absence of seed quality control and certification systems, high transaction and transportation costs, and difficulties in contract enforcement represent the main constraints to the development of a domestic seed market. The main solutions co-created by these multiple stakeholders include:

1. **Establish a public-private seed quality control and certification system**, to be managed by the Seed Trade Association of South Sudan (STASS) under the supervision of the government and in close collaboration with other key stakeholders, in order to improve the transparency and credibility of local seed companies and enable their access to institutional buyers, especially to those humanitarian agencies that procure seeds from abroad and distribute them for free across South Sudan.
2. **Develop a commercial seed distribution network (of agro-dealers)**, to be also managed by STASS so as to ensure last mile seed distribution by local seed companies and broader seed accessibility for farmers.
3. **Introduce a farmer accountability mechanism** within STASS to build trust, enforce contracts, and promote sustainable input financing arrangements.



## Introduction

As part of the A3SEED project, KIT, IFDC and EKN organized a multi-stakeholder workshop in Juba, South Sudan, on February 19. This day brought together representatives from: local seed companies, agro-dealers, as well as farmer and trader associations; the Ministry of Agriculture and Food Security, both at the federal and state levels; various donors (EU delegation and Netherlands, Swiss and Norway Embassies) and multiple governmental and non-governmental organizations. The discussion was kickstarted by three presentations by IFDC, STASS and KIT, which made the case for a more market-driven seed sector and for the reduction of foreign seed distribution by humanitarian agencies.

In particular, KIT presented the results of two recently published research papers, based on the largest dataset available on (2,000) South Sudanese farm-households. First, KIT's research showed that seed aid distribution is estimated to cost about 100 million USD per year, but its impact on maize cultivation, production and productivity is negligible, except for farm-households with no seed stocks and operating in acute emergency (conflict) situations. Second, KIT presented the results of a recent randomized control trial (RCT), demonstrating that farmers from the Eastern Equatoria state have the willingness and ability to buy the seeds sold by local seed companies, and that these seeds have the potential to double maize yields, outperforming locally recycled seeds as well as foreign seeds distributed for free by humanitarian agencies. These findings thus led to the conclusion that the country is ready to accelerate the transition from seed aid to seed market. To do so, humanitarian agencies should however procure progressively more seeds from within South Sudan, and donor funding should gradually shift its focus from seed aid distribution towards the development of last mile seed marketing networks.

How to accelerate such a transition? The remainder of the workshop was dedicated to engage the participants in answering this overarching questions, through structured discussions bringing and blending together the different interests and competences of multiple stakeholder groups.

## Methodology

Workshop discussions were structured around seven thematic groups or tables, each one addressing a critical component of the seed value chain:

1. Variety development and Early Generation Seed (EGS) production
2. Seed multiplication and seed production
3. Seed marketing and distribution
4. Seed demand and use



5. Seed aid
6. Seed quality assurance
7. Seed governance, policies, and partnerships

Each thematic table grouped different stakeholders (from public, private and civil society organizations) and engaged them in discussions aimed at identifying barriers and opportunities to achieving a viable, inclusive and sustainable market-based seed sector. Consequently, participants developed policy suggestions to address these barriers and leverage identified opportunities. A voting process was finally set up to democratically identify the most important policy suggestions. The recommendations presented in this brief reflect the policy suggestions that emerged during the workshop and received the largest number of votes by the participants.

The methodology involved:

1. **Defining the Ideal State:** Each group started with a brief discussion on what an ideal state of their thematic area would look like. This helped establish a clear vision to guide further discussions.
2. **Identifying Barriers and Catalysts:** Participants listed critical barriers and positive developments (catalysts) related to their thematic area. These were mapped and organized by table leads and note takers in real-time.
3. **Selecting Key Themes:** During the tea break, table leads reviewed the listed barriers and catalysts, categorizing them into themes. Two priority themes were selected per group for further discussion.
4. **Formulating Policy Proposals:** Each group formulated policy proposals aimed at overcoming identified barriers and scaling catalysts. Proposals were structured to include objectives, actions, stakeholders, and expected outcomes.
5. **Presentation and Prioritization:** Policy proposals were presented to all participants, followed by a voting process to determine the most viable suggestions.

## Discussion

Workshop discussions stressed that South Sudan has been depending on foreign-sourced seed aid for more than 15 years. While seed aid distribution is still justified in acute conflict and emergency areas, it appears to crowd out domestic seed companies and their improved seeds in most other parts of the country. And yet, free distribution of foreign (mostly Uganda) seeds continues undeterred throughout South Sudan, with the only exception of Western Equatoria state where the Minister of Agriculture decided to impose a ban to foreign seeds importation.



In recent years, the seed sector in South Sudan has made significant progress, particularly in terms of building the capacity of domestic seed companies to produce better-quality and higher-yielding seeds. These companies have demonstrated the technical know-how and expertise necessary to produce seeds that meet regional and international standards. However, despite their capabilities, local seed companies face severe challenges competing in the domestic market. The widespread practice of foreign seed distribution by humanitarian agencies continues to undermine commercial seed sales, limiting the ability of local companies to develop sustainable and profitable business models.

Local seed companies struggle to sell seeds to farmers, but also to the humanitarian agencies that are active in seed aid distribution. A critical obstacle to selling seeds to humanitarian agencies (and more in general, to access any kind of institutional buyers, including hotels, supermarkets, etc.) is given by the absence of a formal seed inspection and certification system. Without formal inspection and certification, local seed companies struggle to demonstrate the quality and reliability of their seeds, thereby losing credibility in the eyes of major institutional buyers. This limitation confines their potential customer base to (mostly small-scale) farmers. However, South Sudanese farmers are accustomed to receiving seeds for free, demand for commercial seeds remains negligible.

The situation is further complicated by the lack of an organized seed marketing network, especially for last mile commercial distribution. Even when high-quality seeds are produced, there is no reliable infrastructure and service to deliver these seeds efficiently to farmers in remote or rural areas. As a result, farmers face difficulties accessing quality seeds at the right time, negatively impacting agricultural productivity and food security. The absence of marketing networks and channels restricts the market reach of seed companies, resulting in low sales volumes and profitability, thus undermining their long-term sustainability.

Compounding these issues is the prolonged stagnation of the “national seed bill”, which remains stalled due to political and administrative reasons. As a result, many stakeholders across the seed sector appear to have lost faith in government-led policy changes, because of the slow pace of the policymaking processes, but also because the government often fail to mobilize the necessary financial resources to implement its new policies. In this context, the South Sudan Seed Trade Association (STASS), which represents all the major seed companies in the country, has emerged as an alternative to government institutions.

As a member-based association, STASS is uniquely positioned to coordinate sector-wide initiatives, such as seed inspection and certification, as well as seed marketing. Drawing on successful models from other African countries, sector-led coordination has demonstrated effectiveness in overcoming similar market barriers, enhancing trust among stakeholders, and ensuring that quality assurance and distribution standards are consistently maintained. Through STASS-led initiatives, seed companies can collectively strengthen their market position, improve access to institutional buyers, and establish a robust, commercially driven seed distribution system.



## Deliberations

This section summarizes the policy suggestions advanced by the seven groups/tables by the end of the workshop, and the results of the voting process.

Thematic group/table	Policy suggestions	Ranking based on voting
1. Variety development and Early Generation Seed (EGS) production	<p><i>Presented by Mr. Taban Wodorison (ZOA/DORCAS)</i></p> <p>South Sudan needs its own national research organization (NARO) for breeding early generation seeds. Investments in a South Sudanese NARO are essential for the development of the national seed sector. Researchers and breeders should organize themselves into an associations, like STASS. And they should develop a crop variety catalog.</p>	4 <sup>th</sup> position
2. Seed multiplication and seed production	<p><i>Presented by Mr. Ochen Emmanuel (International Red Cross)</i></p> <p>More investment are needed to improve/expand the production, multiplication and quality control of foundation seeds. National seed inspection and certification policy is needed to help the private sector thrive, especially to promote in-country seed production and multiplication.</p>	1 <sup>st</sup> position***
3. Seed marketing and distribution	<p><i>Presented by Mr. Nyora Emmanuel (Premium Agro-consultant)</i></p> <p>More investments are needed to expand the agro-dealers' network. Agrodelaers networks need to be expanded for farmers to access quality seeds and improve their productivity. Seed marketing strategies should also involve cooperatives, as cooperatives can buy seeds in bulk.</p>	3 <sup>rd</sup> position*



4. Seed demand and use	<p><i>Presented by Mr. Eddington Chinyoka</i> <i>(Norwegian People's Aid, NPA)</i></p> <p>Government extension services are inadequate, South Sudan relies too much on NGOs for extension purposes, the private sector needs to step in. Village Saving and Loans Associations (VSLAs) can provide the necessary credit for farmer to buy seeds.</p>	6 <sup>th</sup> position
5. Seed aid	<p><i>Presented by Mr. Wani Yoele</i> <i>(Oxfam)</i></p> <p>Seed aid needs to be gradually reduced. Everybody is used to seed aid and counting on it, so it cannot be just cut out overnight. To do so, financial resources need to be gradually shifted away from seed aid distribution and towards the development of seed markets.</p>	5 <sup>th</sup> position
6. Seed quality assurance	<p><i>Presented by Ms. Ashjan P. Edward</i> <i>(South Sudan National Bureau of Statistics)</i></p> <p>In the absence of a seed law and regulation, it is necessary to develop a voluntary quality assurance standard for seed producers, to be developed by all stakeholders, including government and managed by STASS.</p>	2 <sup>nd</sup> position**
7. Seed governance, policies, and partnerships	<p><i>Honorable Doctor Ms. Ghada James Killa</i> <i>(Ministry of Agriculture)</i></p> <p>There is a need to better coordinate seed sector governance between the central/federal ministry of agriculture in Juba and the ministries of agriculture in the different states. A national seed policy is still missing, and should not only be led by FAO and Government, there is a need to involve multiple stakeholders. But policymaking is to enough, the government needs to ensure also the availability of financial resources for policy implementation. The problem is that people are losing faith in government processes.</p>	7 <sup>th</sup> position (last)



## Policy Recommendations

### Recommendation 1: Establishing a Seed Quality Control System Managed by STASS

#### **Objective:**

To convene a multistakeholder process to establish a seed quality assurance board. All major seed sector stakeholders (MoA, STASS, local seed companies, SSNBS, SQCB, FAO, INGO seed buyers) will be represented with the task of collectively designing and governing a national seed quality assurance standard and marque, initially targeted at institutional seed buyers (humanitarian agencies) in order to get rapid traction and create a sustainable revenue stream to sustain quality assurance operations. STASS with the support of A3SEED will facilitate the mobilization of the national quality control board to deliver: a) an innovative, responsive, and contextually relevant quality control standard, b) an operational protocol and c) a sustainable financial business model based on cost-recovery.

#### **Justification:**

The workshop revealed that the lack of quality assured seed is the pressing bottleneck to the further development of the seed value chain. A national seed law and subsequent seed policy for the implementation of quality control standards has not been passed, nor is it foreseen to be passed in the short to medium term. Based on the inputs of sector stakeholders, starting a process for a national seed quality assurance system is a priority action in 2025, to enable local seed companies to sell more seeds to humanitarian agencies and other institutional buyers.

### Recommendation 2: Developing a Commercial Seed Distribution Network

#### **Objective:**

To establish a functional and sustainable network of distribution points managed by agrodealers or agri-cooperatives that enhances farmers' access to commercial seeds, thereby improving agricultural productivity and supporting the growth of local seed companies.

#### **Justification:**

In South Sudan, the absence of an organized seed distribution network hinders farmers' access to commercial seeds, limiting agricultural productivity and the viability of local seed enterprises. Experiences from other African countries demonstrate that collective efforts by seed companies and farmers can effectively establish distribution networks, enhancing seed accessibility and supporting sector growth.





### Recommendation 3: Strengthening STASS Governance

#### **Objective:**

To strengthen the organizational capacity and governance structure of STASS, enabling it to:

- i) effectively coordinate and implement the proposed seed certification and commercial distribution networks;
- ii) build trust and improve contractual compliance between seed companies and seed-producing farmers by implementing a sector-managed accountability system.

#### **Justification:**

The successful implementation of seed certification and distribution initiatives depends heavily on a central, transparent, and accountable coordinating body. STASS is well-positioned to assume this role, provided it can establish the necessary organizational strength, clarity in governance, and collaborative mechanisms. Robust internal governance and coordination capacity within STASS is thus a prerequisite for achieving the broader objectives of a sustainable market-based seed sector.

Seed-producing farmers frequently require input financing from seed companies, but enforcing contracts has proven difficult. Farmers may side-sell their produce, leading to financial losses for companies and mistrust in the sector. Currently, no structured enforcement mechanism exists within the seed sector, making companies reluctant to provide essential credit. Introducing a centralized accountability system managed by STASS will foster transparency, enhance trust, and facilitate reliable partnerships between seed companies and farmers.

### Conclusions

After 15 consecutive years of dependency on foreign-sourced seed aid, South Sudan is ready to make a transition towards a market-led seed sector, which is critical to trigger agricultural growth and entrepreneurship in the country. A recent study by KIT and IFDC found evidence that, against common arguments, South Sudanese small-scale farmers have an interest and the ability to invest in locally produced commercial seeds, given that these have the potential to double maize yields. These results highlighted the importance for a gradual and controlled transition from seed aid to seed market. To promote such a transition, A3SEED organized a multi-stakeholder workshop in Juba on February 19, 2020.

This brief further highlights that, although local seed companies have significantly advanced their technical capacities, structural challenges—such as the absence of seed inspection and certification mechanisms, competition from NGO-distributed seeds, limited distribution channels, and ineffective contract enforcement—continue to restrict their full potential. Given the ongoing political and administrative hurdles delaying government-led initiatives, a coordinated, private sector-driven approach led by STASS emerges as the most viable and timely solution. By assuming responsibility for establishing a seed quality control system, developing a commercial distribution



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network, and creating an accountability mechanism for seed-producing farmers, STASS can effectively address these core challenges. Crucially, strengthening STASS's internal governance and organizational capacity is a prerequisite for the success of these interventions.

Immediate actions should therefore prioritize enhancing STASS's role and capabilities, swiftly implementing the proposed seed inspection mechanism, setting up a reliable distribution network, and introducing measures to strengthen contract-based trust between seed companies and seed-producing farmers. Collectively, these recommendations provide a robust roadmap for South Sudan's transition towards a market-based seed sector.

