

Hybrid and improved forage seed markets in East Africa: Developments, bottlenecks, and future opportunities

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Introduction

- ▶ In East Africa, forage represents the main source of food for dairy. Producers use local varieties, but in recent years there has been a sustained increase in the adoption of hybrid and improved forages.
- ▶ Forages represent an opportunity to improve the productivity of the sector in terms of quantity and quality and improve adaptation to climate change.
- ▶ We developed a study that identifies opportunities for the growth of the hybrid and improved forage market (H&IFSM) in East Africa.

Objective

To describe the behavior of the H&IFSM in East Africa in recent years and to develop a perspective analysis on how this market is expected to evolve in the next decade, in addition to identifying the main bottlenecks and opportunities for improvement.

Results

Market development in recent years:

- ▶ In recent years, the H&IFSM has shown a sustained increase in both the sold quantities and sales prices. Currently, however, a deficit in H&IFS supply is observed in the region, which is responsible for increasing seed prices.
- ▶ The most adopted varieties in the region are *Cenchrus purpureus* and *Chloris gayana* (local), respectively *M. maximus* and *Urochloa* (improved). There is adoption of *Urochloa* hybrids cvs. Mulato II, Cayman, Camello, and Cobra.

Future market perspectives:

- ▶ Over the coming years, the current growth trend of H&IFSM is expected to continue.
- ▶ Stakeholders expect the boom in *Urochloa* and *Megathyrsus maximus*, the two most popular varieties to date, to continue and the use of hybrids to increase.

Stakeholder's requirements for breeding programs:

- ▶ Continue with the improvement of varieties such as *Urochloa* and *M. maximus*.
- ▶ Start working on breeding local varieties, especially *Cenchrus purpureus* and *Chloris gayana*, and legumes such as *Alfalfa* and *Desmodium*.

References

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Methodology

Qualitative approach. Key informant interviews with stakeholders. 43 interviews with 48 people.

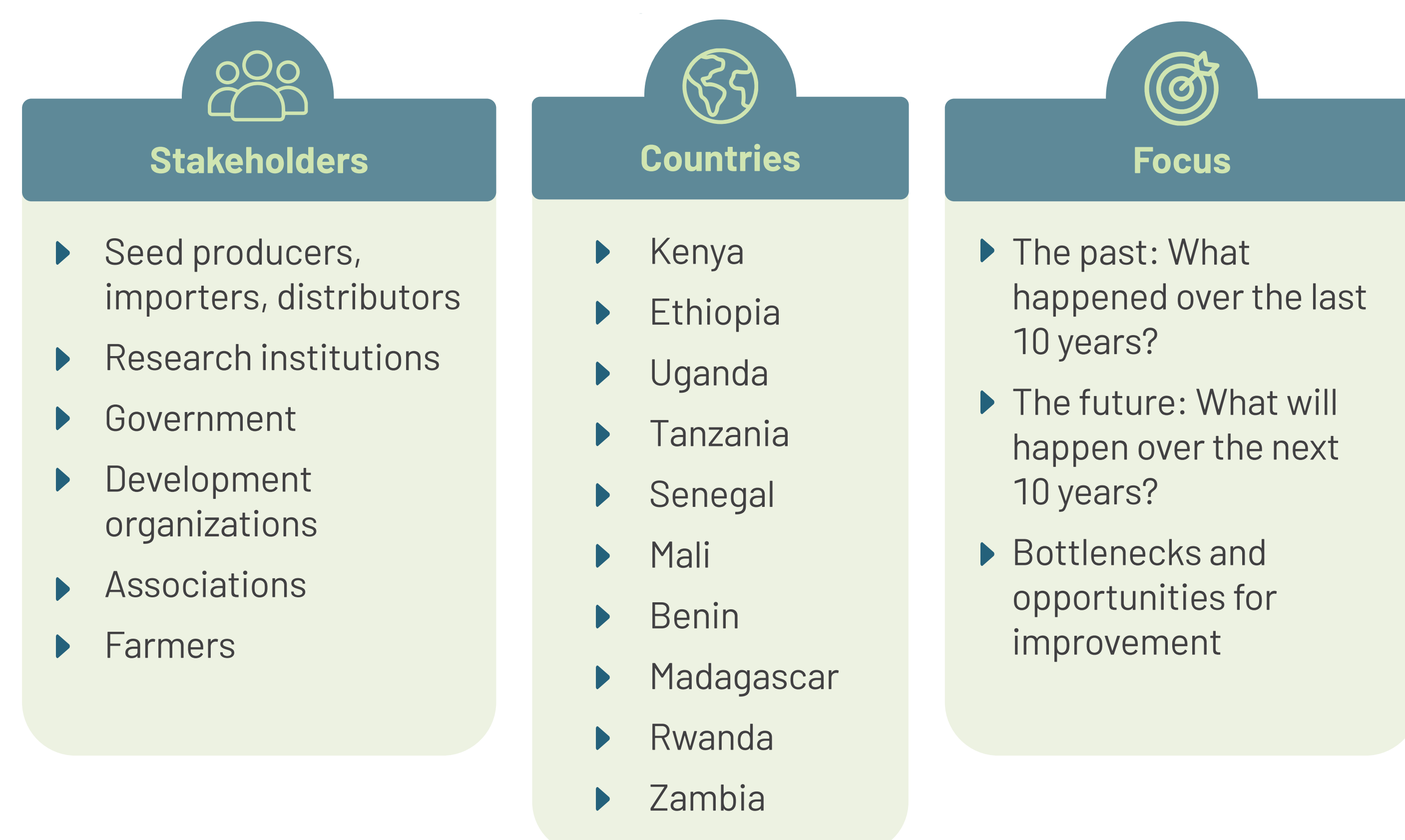


Figure 1. Interviews description

Main problems and improvement opportunities:

- ▶ **Seed price:** The main restriction is access to seeds given seed shortages and high prices. The seeds of hybrid and improved forages are commercialized in the region in a range of 40-50 US\$/kg.
- ▶ **Registration of new varieties:** This process is quite complex and delays the arrival of new varieties in the region, which creates a disincentive to import.
- ▶ **Knowledge:** Hybrid and improved forages can be more complex to manage than the local forage varieties traditionally used by producers. In general, producers still do not have much knowledge about these forages.

Conclusions

A virtuous circle is observed for accelerating adoption of hybrid and improved forages in East Africa over the coming years.

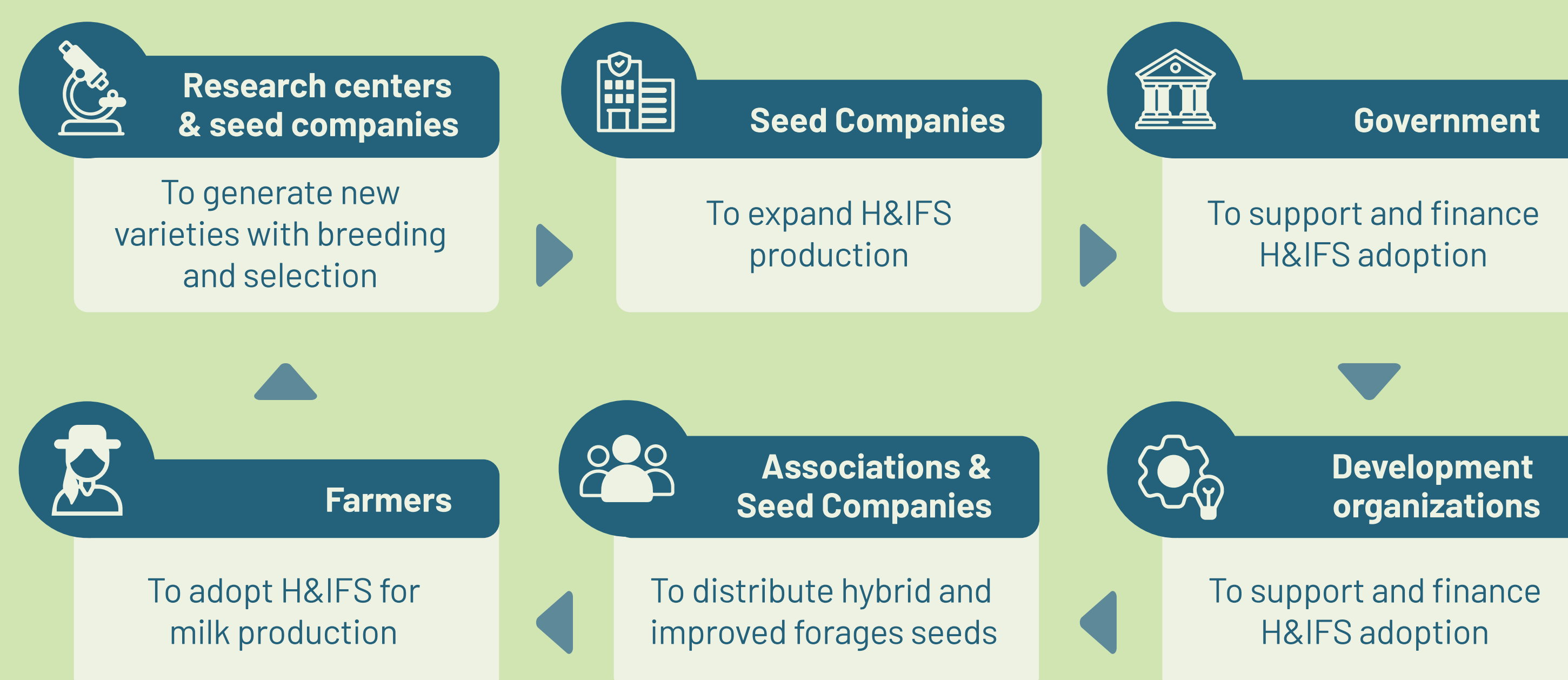


Figure 2. Virtuous circle for accelerating adoption

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