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The Seed Industry in Afghanistan

Report Categories:

Planting Seeds

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Report Highlights:

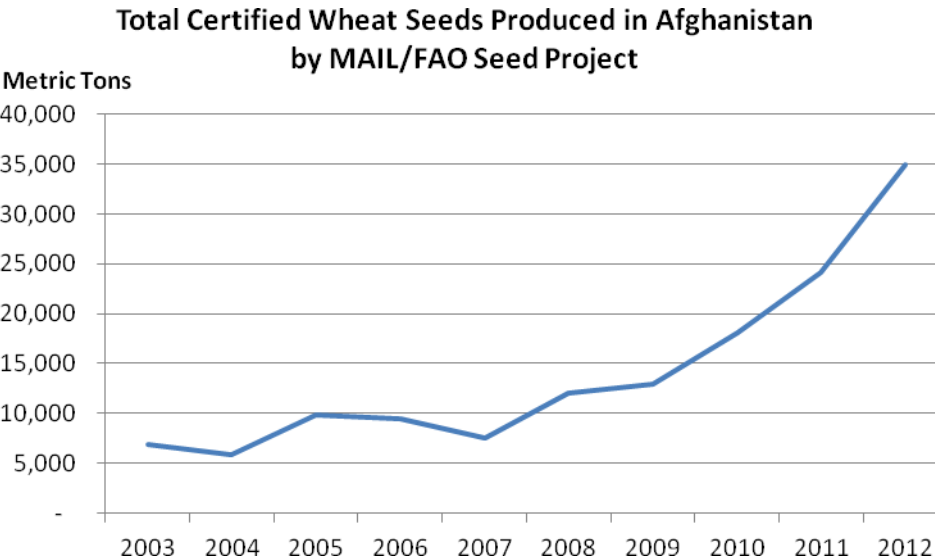
The Office of Agricultural Affairs estimates calendar year (CY) 2012 certified wheat seed production at 35,000 MT, a 94 percent increase from CY 2010, which is attributed to the establishment of new Private Seed Enterprises (PSEs) and increased demand for quality wheat seeds in the country. The total demand for wheat seeds are at 300,000 metric tons (MT), corn seeds at 11,000 MT, and vegetable seeds at 500 MT for CY 2011. The primary source of seeds for Afghan farmers is through their own farm-saved seeds. Afghanistan imports only a small quantity of vegetable seeds from large multinational companies.

Production:

Afghanistan’s Ministry of Agriculture, Irrigation and Livestock (MAIL) reports total demand for wheat seed at 300,000 metric tons (MT), corn seed at 11,000 MT, and vegetable seed at 500 MT for calendar year (CY) 2011. [1]

Afghanistan’s seed sector has been reestablished with the assistance of the international community. Projects include the renovation of agriculture research stations and seed testing laboratories and seed enterprise development. The formal seed sector in Afghanistan focuses primarily on wheat seed because wheat is the main staple crop, accounting for approximately 50 percent of food expenditures and 70 percent of all cereal consumption among Afghans. Consecutive years of drought over the past 10 to 15 years have reduced the availability of quality wheat seed.

Afghanistan’s formal seed sector produced 62 MT of breeder seed, 762 MT of foundation seed, 24,136 MT of certified wheat seed, and 3,294 registered seed varieties in CY 2011. The Office of Agricultural Affairs estimates CY 2012 certified wheat seed production at 35,000 MT, a 94 percent increase from CY 2010, which is attributed to the establishment of new Private Seed Enterprises (PSEs) and increased demand for quality wheat seeds in the country. The primary source of seed for Afghan farmers is through their own farm-saved seeds.



Source: Agriculture Prospect Report MAIL-Afghanistan 2011.

Afghanistan follows a four generation system of seed multiplication and has used four classes for seed production: breeder seed, foundation seed, registered seed, and certified seed. The Agriculture Research Institute of Afghanistan (ARIA) is responsible for the production of breeder seed while the Improved Seed Enterprise (ISE), a unit under MAIL is mandated for the foundation seed and registered seed. PSEs are associated with the Afghanistan National Seed Organization (ANSOR) and are responsible for the multiplication and production of certified seed. ANSOR is the national seed association for all commercial seed producers in the country. There are more than 100 PSEs operating under ANSOR with a combined production capacity of approximately 50,000 MT. Donor agencies such as the United Nation Food and Agriculture Organization (UNFAO), the International

Maize and Wheat Improvement Center (CIMMYT), the International Center for Agricultural Research in Dry Areas (ICARDA), and the European Union (EU) play an important role in the Afghan seed industry as they assist with variety improvement, seed production, and seed enterprise development.

During the last ten years, almost all certified wheat seed produced by PSEs were sold to the Ministry of Agriculture, Irrigation, and Livestock and donor agencies for wheat seed distribution programs where farmers were given seeds and fertilizers at subsidized rates. Despite significant production of certified wheat seed, a small quantity of seed is purchased directly by farmers in commercial markets.

^[1] Please note that the Afghan calendar year begins on March 21 and ends March 20. For example, CY 2011 runs from March 21, 2011 to March 20, 2012.

Seed Pricing and Packaging

PSEs produce certified wheat seed through their contract growers located throughout Afghanistan. Seeds are then cleaned through air-screen cleaners and stored in 50 kilogram (kg) bags in the PSE's storage facilities. Initially prices for wheat seed were set by the National Seed Board, but after CY 2011 PSEs were allowed to determine wheat prices on a competitive basis. In CY 2011, the cost of 50 kg of certified wheat seed ranged from 30 to 35 U.S. Dollars. According to an FAO survey on the Afghan seed market, farmers buy only 31 percent of their required seeds from formal and informal sources, while more than 60 percent of farmers used their farm-saved seeds for cultivation. Afghan farmers buy certified seeds either from PSEs or other suppliers within their vicinity.

Seed Certification and Variety Approval

The National Seed Secretariat under the Ministry of Agriculture, Irrigation, and Livestock is the core institution for coordinating seed industry functions in Afghanistan. The seed secretariat consists of the National Seed Board and its affiliated bodies: ARIA, Variety Release Committee (VRC), and ANSOR.

Afghanistan obtains advanced breeding lines from international agriculture research centers such as CIMMYT and ICARDA. These breeding lines are tested and evaluated in different agro-ecological zones for adaptation and stability. The best breeding lines are then selected for breeder seeds under national trials. MAIL's Agriculture Research Institute produces breeder seed on their research farms through Improved Seed Enterprises (ISEs). ISEs and PSEs have two different set ups in the seed development sector; the first is a public organization under MAIL that obtains breeder seed from ARIA and produces both foundation seed and registered seed, while the later is a private business that purchase foundation seed or registered seed from the ISEs to produce certified seed through their contract growers.

Import Regulation

The Afghanistan Seed law specifies conditions for seed imports and exports e.g., procedures and obligations.

Under the Afghanistan Seed Law, seed imported for the purpose of seed multiplication, which is not listed in the National List of Varieties of Afghanistan (NLVA), must be tested for adaptation at MAIL research stations under different agro-ecological conditions for at least four years before it will be allowed into Afghanistan for

commercial use. Imported seeds that have already been tested and evaluated in Afghanistan and listed in the NLVA, does not require research trails, and only needs germination, purity, and quarantine certificates at the port of entry. Imported seeds for which there is no predetermined certification scheme only requires germination and physical purity certificates and labels.

Tariff

Afghanistan applies a 2.5 percent tariff rate on seed imports.

Trade:

According to the ICARDA seed focus report, there was a certain amount of wheat seed imported from Pakistan used for seed distribution programs by commercial traders in CY 2002, for which data is unavailable.

Afghanistan imports only a small quantity of vegetable seeds from large multinational companies. The following trade matrix provides information on vegetable seeds imported into Afghanistan.

Reporting Countries Export Statistics (Partner Country: Afghanistan)					
Commodity: 120991, Vegetable Seeds For Sowing					
Calendar Year: 2009 - 2011					
Reporting Country	Unit	Quantity			% Change
		2009	2010	2011	2011/2010
Reporting Total	kg	23,060	82,529	22,073	-73.25
Netherlands	kg	11,100	30,400	7,500	-75.33
Iran	kg	7,150	-	2,000	375
United States	kg	2,456	-	-	
United Arab Emirates	kg	1,535	27,641	2,074	-92.5
France	kg	400	1,200	5,700	
Thailand	kg	307	2,603	999	-61.62
India	kg	100	385	-	
South Korea	kg	12	-	-	-100
Italy	kg	-	20,300	-	-100
Denmark	kg	-	-	3,800	

Source: Global Trade Information System