

BACKGROUND

The South African National Seed Organization (SANSOR) was established in 1989, to provide role players in the local seed industry with a formal and strategic body to protect and further the interests of the seed trade (SANSOR, undated).

The seed industry in South Africa has been reported to be advanced compared to other African countries (DAFF, 2017) and it is prevalent in all nine provinces. The South African seed industry is regulated under the 1976 Plant Improvement Act to ensure orderly trade in seeds (seed index, 2019). Moreover, SANSOR represents 80 full members which are seed trade companies and co-operatives (SANSOR, 2020).

SANSOR is the national designated authority to manage and execute all functions pertaining to seed certification and legislation on behalf of government, also control and verify that seeds were produced, inspected and graded in accordance with the requirements of the national and various international Seed Certification Schemes and train seed trade personnel (SANSOR, 2020).

The Seed sub-sector is comprised of three major sections namely, agronomy (grains, beans, sorghum and cotton), horticulture (all vegetable and flower seeds) and Forage (all planted animal feeds, fodder, and turf and crop seeds).

PRODUCTION

Production of high-quality seed is fundamental to modern agriculture. Most annual crops are established each season from seeds (UC, 2019). Seed production value has increased by a massive 68% since 2015. The vegetable seed market in South Africa has shown a growth of 7% in 2019 compared to 2018. Furthermore, 2019 preliminary data indicates that 6% more forage seed was sold compared to 2018 (SANSOR, 2020). Figure 1 below indicates the value of seeds produced between the 2015-2019 period in South Africa. The figure indicates an increase in the value of seed production between 2015 and 2017 and a slight decrease in 2018 which then recovered again in 2019. Drought and late rainy seasons have negatively impacted the production of row crops ultimately affecting the average grower's financial situation.

Figure 1: 2015-2019 Seed production in South Africa

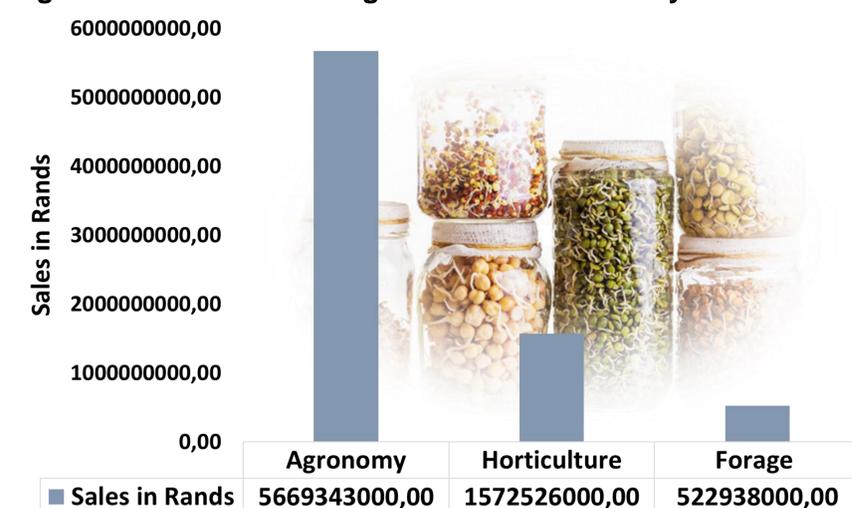


Source: SANSOR (2019)

MARKET ANALYSIS

The figure 2 below illustrates sales (locally and internationally) for South African Agronomy, Horticulture and Forage seed in the financial year 2018/2019. Agronomy had the highest proportion of sales, followed by horticulture, and forage with the least seed sales.

Figure 2: Seed sales during the 2018/19 financial year



Source: SANSOR (2019)

SECTOR CHALLENGES

- Climate change on seed production is a huge concern and it is clear that major events like droughts and heat waves are causing destruction in seed production around the world. These climate change events affect reproduction, flowering, seed yield, and ultimately seed quality to name a few (Singh *et.al.*, 2013).
- Intellectual property protection is a world-wide challenge (SANSOR, 2020) as there are people who are illegally cleaning, treating and/or making sale of seed without a license or permission of the owners of Plant Breeders' Rights (PBR).
- One of the major challenges faced by members is obtaining proper phytosanitary certification. Phytosanitary certification is used to confirm that a consignment of seed for export and/or re-export meets the entry requirements of the importing country (SANSOR, 2020).
- Border closures and restrictions on movements due to global pandemic has made it difficult for some African seed companies to produce and import sufficient quantities of quality certified seeds (AFS, 2020). Furthermore, ISF (2020) reported that the main issues facing the seed industry under COVID-19 pandemic are as follows:
 - Closure of garden centres, resulting from the ornamental industry being deemed as non-essential service which lead to loss of contract with supermarkets and hotels to name a few.
 - Seed supply issues, as seed or plants sales to amateur gardens was prohibited.
 - Challenges related to transporting goods both nationally and internationally caused by the compulsory social distancing and movement restrictions regulations.

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Acknowledgments



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