



Newsletter

Issue 17, September 2026

About this newsletter

The purpose of the ESP+ newsletter is to provide relevant information on the latest developments and current issues in the Ethiopian seed sector and the partnership support activities.

In this issue we highlight the major activities that have taken place between June - September 2026.

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El Niño risks: What Ethiopia's seed sector should do now

Ethiopia's seed sector faces two contrasting El Niño risks: below-average June–September rainfall in western and central areas, and above-average October–December rainfall with greater flood risk in eastern and southern areas. The August 2026 FSNWG special report, "Strengthening El Niño Conditions: Implications for Rainfall, Flood Risk and Food Security in Eastern Africa" warns that these conditions could disrupt seed production, markets, quality, logistics, and finance. Seed companies, regulators, research institutions, producers, distributors, and development partners need to act early.

What the outlook means for Ethiopia

- **Contrasting rainfall risks:** Western and central Ethiopia may receive below-average rainfall during the main June–September season. Eastern and southern areas may instead face above-average rainfall and flooding from October to December. Seed demand, production, and delivery conditions will therefore vary sharply by location.

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Replanted maize seed production fields following El Niño-related moisture shortages in Central Ethiopia

El Niño risks: What Ethiopia's seed sector should ...

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- **Seed production exposure:** Moisture stress can reduce multiplication yields, germination performance, and the volume of marketable seed. Excess rain and flooding can damage seed fields, delay harvesting, increase disease pressure, and complicate drying and processing.
- **Food-security link:** Reduced crop and livestock productivity, water shortages, and disrupted planting may increase demand for emergency seed and for short-cycle, drought-tolerant, and locally adapted varieties. At the same time, lower farmer purchasing power could weaken commercial sales unless financing or public procurement support is available.
- **Need for anticipatory action:** Seed-sector actors should use updated forecasts before seasonal shocks occur to adjust production targets, allocate stocks, schedule quality control, plan transport, and inform agro-dealers and farmers.

Key implications for seed companies in Ethiopia

- **Production risk:** Drought may reduce seed multiplication output in western and central production zones; excessive rain may cause field losses, disease, delayed harvest, and post-harvest quality deterioration in eastern and southern zones.
- **Demand uncertainty:** Planting dates, replanting needs, crop choices, and variety preferences may shift quickly. Demand could increase for early-maturing, drought-tolerant, flood-tolerant, disease-resistant, and locally adapted varieties, but companies must match supply to the right place and time.
- **Inventory and quality risk:** Companies may face shortages of suitable varieties in one zone and unsold stock in another. Humidity and disrupted drying can also threaten germination, purity, and storability.
- **Distribution risk:** Flooded roads, damaged infrastructure, and localized insecurity of access can delay last-mile delivery during narrow planting windows.
- **Financial risk:** Lower farmer incomes can weaken cash sales and increase receivables, while emergency procurement may create opportunities but also expose companies to late orders,

compressed delivery schedules, and payment delays.

- **Reputational risk:** Promoting varieties without matching them to local rainfall outlooks, agroecology, and verified performance can undermine farmer trust and increase complaints.

Evidence from supported private seed companies

The impact of El Niño on seed production in Ethiopia has been significant. This climatic event has brought about significant moisture shortages and irregular rainfall patterns, severely affecting seed production across various regions in the country. The ESP+ project has been closely monitoring these developments, especially with companies it is supporting.

One of the most affected areas is Central Ethiopia, where two seed companies working with the ESP+ project were compelled to replant approximately 600 hectares of maize seed fields. The irregular rainfall and moisture shortages disrupted the initial planting, necessitating this costly and labor-intensive replanting process. Similarly, in Oromia, a company managing wheat seed production experienced inadequate moisture levels, adversely affecting around 20 hectares of their crop.

The situation in Benishangul-Gumuz was equally challenging. Delayed and insufficient rainfall led to two companies missing the optimal sowing window. This timing is crucial for seed production as it determines the quality and yield of the crop. Missing this window meant that these companies were unable to produce any seed for that season, resulting in higher operational costs and increased production risks.

The challenges of these disruptions extend beyond immediate financial losses for the seed companies. They also pose a threat to food security in the region, as fewer seed production opportunities can lead to reduced crop yields in subsequent planting seasons. This situation underlines the importance of developing resilient agricultural practices and infrastructure that can withstand the unpredictable nature of climate events like El Niño.

Efforts are needed to support these seed companies in adapting to changing climatic conditions. This could include investing in irrigation systems, researching drought-resistant crop varieties, and implementing advanced weather forecasting technologies. By taking proactive measures, the agricultural sector in Ethiopia can better prepare for future climate challenges and ensure sustainable food production for its population.





Seed germination failure of maize seed production fields due to El Niño-related moisture

Seed companies should monitor rainfall forecasts, dry spells, floods, road access, crop development, disease, expected yields, and seed-quality results. They should also track changes in farmer demand, government and humanitarian procurement, and the availability of basic seed for future production cycles. Combining

climate information with decentralized production, careful inventory management, quality assurance, flexible distribution, and financial planning will help public and private actors deliver the right seed to the right place within the planting window.



Priority actions for Ethiopian seed companies

1

Segment plans by agroecology



Avoid a single national response. Adjust production, product mix, and distribution by expected drought, normal-rainfall, and flood-risk zones.

2

Protect seed production



Diversify multiplication sites, prioritize irrigation access where feasible, strengthen field inspection and disease surveillance, and prepare contingency harvesting, drying, and processing arrangements.

3

Rebalance portfolios and stocks



Review availability of early-maturing, stress-tolerant, and locally adapted varieties; pre-position appropriate seed close to likely demand while limiting speculative overstocking.

4

Safeguard quality



Increase sampling and germination checks for lots exposed to drought, excess moisture, or delayed processing, and reinforce warehouse moisture management and traceability.

5

Strengthen market intelligence



Coordinate with regional agriculture bureaus, research centers, cooperatives, agro-dealers, humanitarian actors, and farmer organizations to track planting intentions, replanting needs, purchasing power, and access constraints.

6

Prepare commercial contingencies



Stress-test cash flow, contracting, transport capacity, and credit exposure under both weak retail demand and sudden institutional procurement.

7

Communicate responsibly



Give farmers timely, location-specific guidance on variety choice and planting windows without overstating forecast certainty.



Benchmarking variety-testing costs: Regional lessons for Ethiopia

As Ethiopia strengthens its variety release and registration system, regional experience offers practical lessons for building testing services that are transparent, standardized, reliable, sustainable and affordable. Getting the model right matters to regulators, breeders and seed companies and ultimately to farmers who depend on well-performing varieties.

Variety testing provides the evidence needed to confirm that a candidate variety meets required standards and offers clear merit before it reaches farmers. Distinctness, Uniformity and Stability (DUS) examination underpins Plant Variety Protection (PVP), while Value for Cultivation and Use (VCU); also conducted as a National Performance Trial (NPT); assesses agronomic performance, adaptation and value under relevant agro-ecological conditions.

Why DUS matters beyond variety release

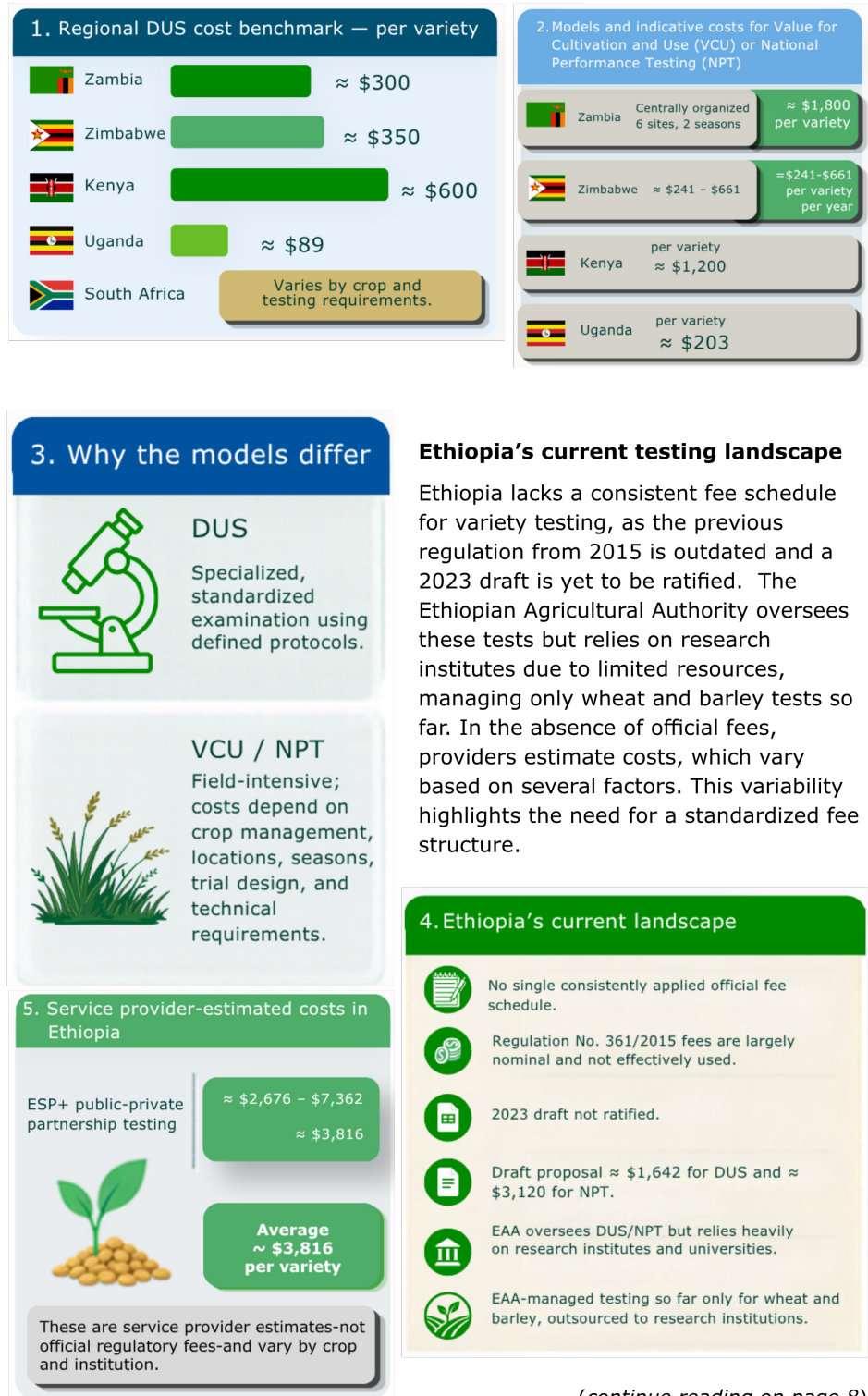
DUS examination is essential not only for variety release and registration, but also for an effective PVP system. It establishes whether a candidate variety is distinct, uniform and stable. An affordable, technically robust DUS service can therefore support breeding investment, innovation and greater private-sector participation.

Regional fee levels provide a useful benchmark for Ethiopia. The aim should be to recover the reasonable cost of a technically sound service without setting fees so high that breeders and seed companies are discouraged from introducing new varieties or that Ethiopia's prospects for earning foreign currency through seed and planting-material exports are constrained.

What regional experience shows

The 2026 TASAI Zambia report highlights DUS and VCU/NPT costs across African countries. DUS fees The 2026 TASAI Zambia report provides a comparative analysis of DUS and VCU/NPT costs across African nations. For DUS, the costs range between \$300 and \$600, with

variations depending on the crop in South Africa. Similarly, VCU/NPT expenses range from \$203 to \$1,800. These disparities underscore the diverse models and costs involved. Ethiopia can leverage these insights to create more effective systems, thereby enhancing investments in the seed sector.



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Five interns, four new careers: How ESP+ is helping build Ethiopia's seed sector workforce

For many young graduates, the transition from university to employment can be a difficult journey. For five graduates placed at Ethio LEAP Agro-tech through the Ethiopian Seed Partnership Plus (ESP+) internship programme, that journey became an opportunity to gain practical experience, develop valuable skills, and launch careers in the seed sector. Today, four of those five interns are employed by the company, highlighting the power of public private partnerships in creating opportunities for young professionals while addressing critical skills shortages.

Ethio LEAP Agro-tech, an Ethiopian agricultural technology company specializing in modern and sustainable farming systems, faced a common challenge during its early years: finding qualified professionals with practical expertise in seed propagation and greenhouse management. While graduates possessed academic knowledge, the company needed employees with hands-on experience in the specialized field of seed production.

The ESP+ internship programme provided a timely solution.

By connecting recent graduates with employers in the seed industry, the programme creates opportunities for young professionals to gain workplace experience while helping companies identify and develop future employees. For Ethio LEAP, the partnership became an effective way to build a skilled workforce from within.

"At the early stage of the company, finding skilled manpower was a challenge," said Bereket Zelalem (PhD), Director of Systems and Strategy at Ethio LEAP Agro-tech. "Seed requires thorough care, like an egg. Finding someone with the right skills, especially in seed production and propagation, was difficult."

According to Bereket, the internship programme benefits both companies and graduates. Interns gain practical exposure to the realities of the seed business, allowing them to apply classroom knowledge in a professional setting. At the same time, employers have an opportunity to assess potential recruits, develop their capabilities, and identify the most promising candidates for long-term employment.



Bereket Zelalem (PhD), Director of Systems and Strategy, Ethio LEAP Agro-tech

"We see the internship programme as part of our corporate responsibility," he said. "It gives fresh graduates the opportunity to gain hands-on experience while helping companies access new talent."

One of the programme's success stories is Moltolign Tigabu, who joined Ethio LEAP as an intern and later secured full-time employment with the company.

Before joining the programme, Moltolign spent months searching for work with little success. Like many recent graduates, he found it difficult to gain employment without prior experience, yet

impossible to gain experience without first securing a job opportunity.

The ESP+ internship changed that.

"The internship programme was a life-changing opportunity for me," Moltolign said. "I was looking for work everywhere but could not even get the chance for an interview. The internship gave me practical experience and an opportunity to show what I could do."

During his six-month placement, Moltolign gained hands-on experience and learned how to apply the concepts he had studied at university in a real working environment. His performance earned him a permanent position, and he has now been working with Ethio LEAP for more than a year and a half.

"Because of the internship, I gained practical experience and had the chance to apply what I learned in theory," he said. "Now I have a job, thanks to the ESP+ internship programme."

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Five interns, four new careers: How ESP+ ...

Moltolign hopes more companies and development partners will create similar opportunities for young graduates entering the agricultural sector. He also encourages graduates to actively seek internships and practical training opportunities that can help them develop their skills and demonstrate their potential.

The experience of Ethio LEAP and its interns demonstrates the value of stronger collaboration between employers, development partners, and training initiatives. By linking education with practical workplace experience, programmes such as ESP+ are not only helping graduates begin their careers but also contributing to the development of the skilled workforce needed to transform Ethiopia's seed sector.



Moltolign Tigabu, former ESP+ intern and current Ethio LEAP Agro-tech employee

“The internship programme was a life-changing opportunity for me. Because of it, I gained practical experience, applied what I learned in theory, and now I have a job.”



ESP+ charts priorities for 2027 and beyond

The Ethiopian Seed Partnership Plus (ESP+) consortium has begun planning for 2027, building on progress to date while responding to emerging challenges and lessons from implementation. The process is identifying priority areas for greater attention and using experience from across the partnership to shape the next phase.

Workshop discussions highlighted steady gains across the project's components. Private seed companies supported through the RESILIENCE BV-led work are expanding production and diversifying their variety portfolios. New financing approaches, including the Guarantee to Grant facility, are also improving access to capital and supporting further growth in seed supply.

ESP+ is also strengthening higher education and professional capacity through research grants, demand-led training and support for business incubation. Its seed-sector internship programme continues to bring together private companies, public enterprises and research centres, creating pathways for young people to gain experience, secure employment and launch businesses.

Farmer adoption of sustainable agricultural practices is rising as demonstrations and training improve awareness of quality seed, improved varieties and resilient production methods. The partnership is also drawing more international companies into public-private collaboration, helping strengthen oilseed, fodder and forage seed systems.

Mercy Corps Ethiopia led seed insecurity response in conflict affected and fragile areas work is advancing more coordinated, evidence-based responses in these regions. Assessments are informing market-based approaches, while new guidance is improving links between humanitarian assistance and long-term development. Support for seed producer cooperatives and community seed banks is increasing local supply, and participatory trials are widening farmers' access to improved, climate-resilient varieties.

Efforts in seed-sector transformation is also on a good track. ESP+ has supported stronger coordination and governance, contributed to policy and regulatory reform, and expanded the use of digital monitoring. More transparent variety testing and registration are aligning national systems with international practice, while barcode-based certification is extending across regions and crops. Improvements in phytosanitary and digital certification, together with new evidence on seed carryover, are also informing dialogue on future seed-marketing reforms.

In 2027 ESP+ will build on the partnership's progress by strengthening collaboration between consortium members and other development partners in the seed sector. Together, these efforts are expected to advance a more resilient, inclusive and market-oriented seed sector that delivers lasting benefits for farmers and communities across Ethiopia.



Benchmarking variety-testing costs: Regional...

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Regional harmonization could reduce duplication

Ethiopia, Zambia, Zimbabwe and Kenya are members of COMESA, which operates a regional variety-registration system for crops including potato, cereals, legumes, roots and tubers, and cotton. For eligible crops, regional registration can reduce duplicated testing and provide an alternative route to registration across participating countries, subject to regional and national requirements. Ethiopia already uses this pathway. However, when domestic registration costs are substantially higher than those in neighboring countries, companies may choose to register in two other COMESA countries and then market seed in Ethiopia.

Building a sustainable Ethiopian service model

Regional experience points to four priorities for the government and the EAA as they shape Ethiopia's DUS and VCU/NPT service model:

- Establish clear, transparent and consistently applied service fees
- Accredite competent public and private providers for DUS and NPT services.
- Use regional experience and crop-specific requirements to inform fee setting.
- Strengthen the EAA's DUS-testing capacity to support both variety release and PVP implementation.

Above all, approving and implementing the service-fee regulation and fully applying the variety-testing and registration framework would give Ethiopia a more predictable system. A transparent model that distinguishes the technical and cost requirements of DUS from those of VCU/NPT could protect regulatory quality while making Ethiopia more attractive to breeders and seed companies.

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