



**Bangladesh Seed Congress 2023, 11-13 February 2023,
BICC, Agargaon, Dhaka**



Bangladesh Seed Industry



BADC, Private Companies, NGO's and Seed Dealer are Major Stakeholders

Annual Turnover **USD**
0.85 Billion in 2021

Expected Turnover **USD**
1.1 billion in 2025

Expected Turnover
USD 1.5 billion by 2031

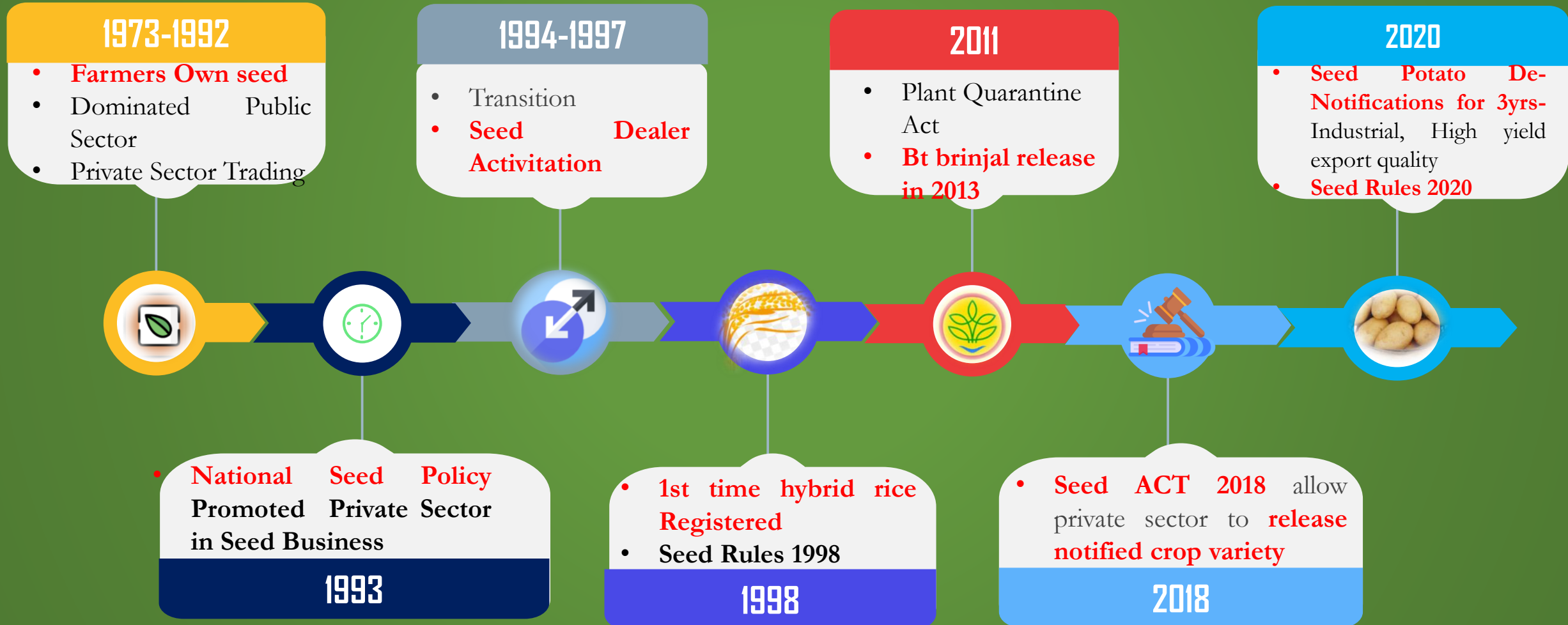
CAGR:6% , 1.4% of Global Seed Industry



Development of Seed Industry in Bangladesh



Bangladesh Agriculture Transformation through Favorable Policy Support



Seed Industry Policy Brief

Bangladesh Agriculture Transformation through **Favorable Policy Support**

01



The National Seed Policy 1993

- Private Sector efforts recognized by the Policy

The Seeds Ordinance 1977, 1997 & 2005

- Urgent /Priority can be made

02



The Seed (Amendment) Act, 2018

- Private Sector allowed to doing research on notified kind of Crops

03



The Seed Seed Rules 2020

- One variety cannot transfer to others
- New company can released variety after 5 yrs

04

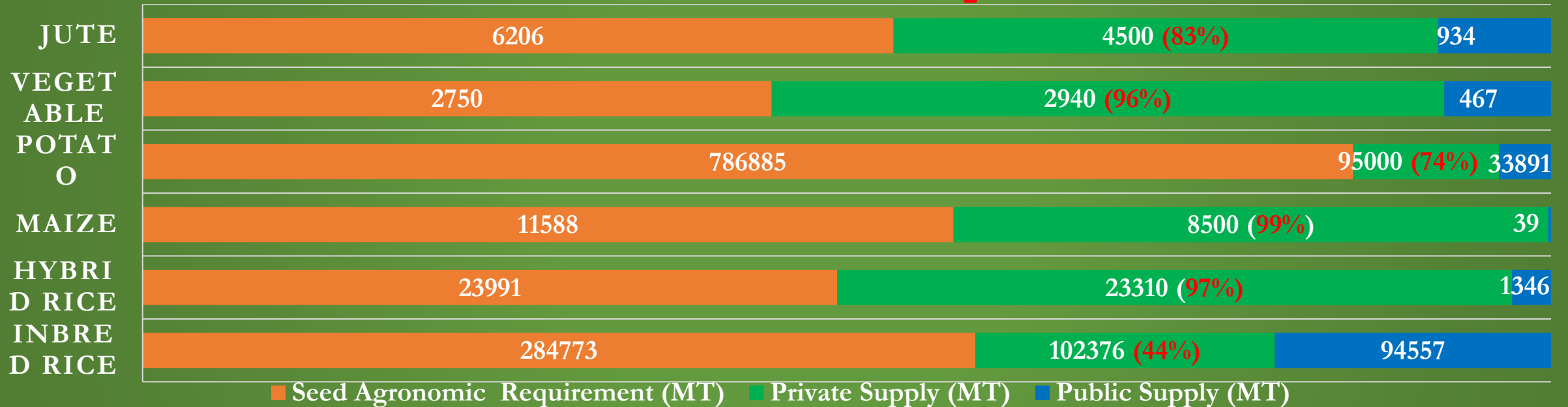


Quality Seed Supply Scenario in Bangladesh

Total Agronomic Requirement of Seed :1254836MT

Total Seed Supply : 405986MT (32%)

QUALITY SEED SUPPLY SCENARIO Fig in MT



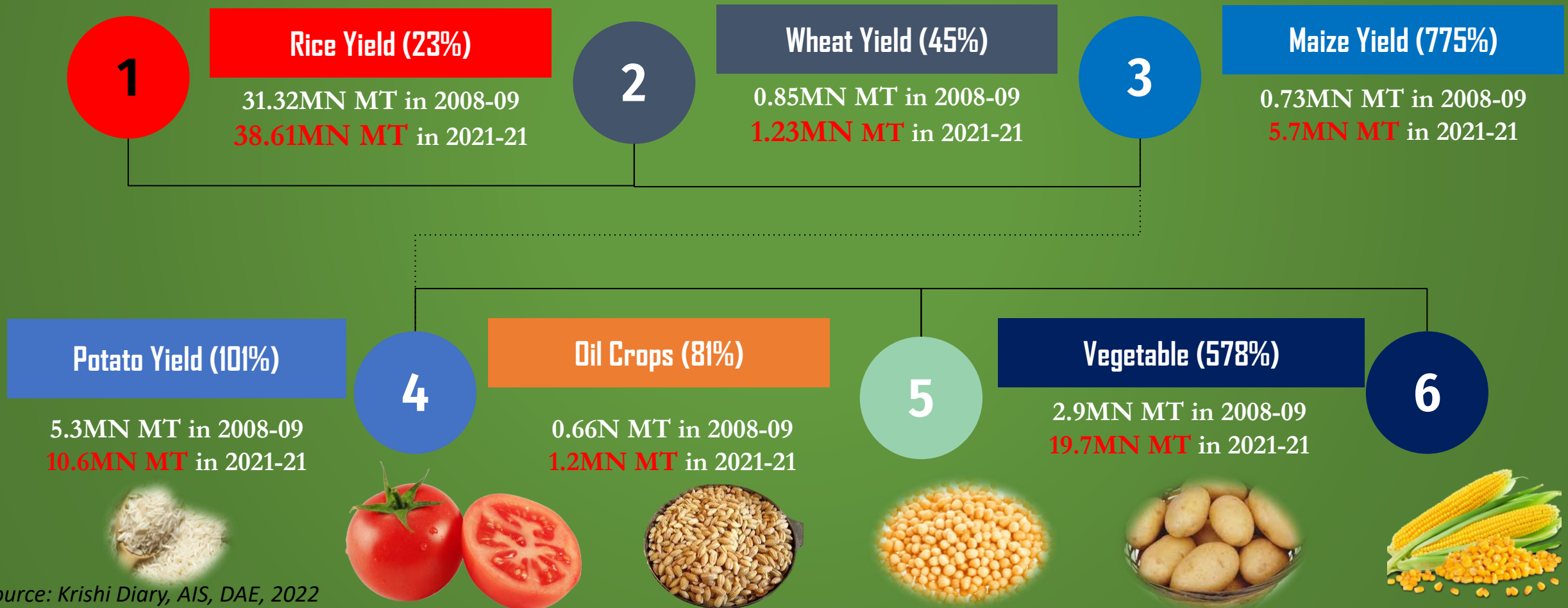
Private sector dominating in supply of **hybrid rice, maize, potato, jute and vegetable**

52% quality seed supplied by the private Sector out of total seed supply

Public sector is leading in inbred rice, minor cereals, pulses, oil and horticultural crops etc

Miracle Changes in **Agriculture Productivity**

Comparing financial year **2008-09** with **2020-21**



Remarkable Progress made in Research & Innovations

NARS Institutes, Private Companies and NGO's

Hybrid Rice

- Registered 237 Hybrid variety
- Public Hybrid :16(7%)
BRRI, BADC, Universities
- Private Hybrid:221 (93%)
Private Companies, NGO's

Inbred Rice

- Released:135 variety for Aus, Aman & Boro
- Public Hybrid : Mostly BRRI, BINA, Universities
- Private Sector started to release (ACI & BRAC)

Potato

- Released 171 varieties
- Public : 96 (56%)
- Private Companies:75(44%)
- High Yielding, Short Duration, Industrial, LB Resistant, Saline Tol etc

Other Crops:

- Public Sector contributed in Pulse, Oil, other minor and horticulture crops
- Private Sector: Flowers, Sunflower, popcorn, sweet corn, exotic fruit crops, flowers and other minor crops

Wheat

- Released 39 variety
- Mostly public : 37 (BWMRI, BARI,)
- Private 02 - Only ACI
- (High Yielding, BLAST, Saline tolerant, high Gluten content)

Hybrid Maize

- Mostly Private: either from MNC's or own developed
- BWMRI also developed 19 Varieties
- High Yield, Higher Shelling %, Kernal Color, Insect Tolerant, Standing ability etc

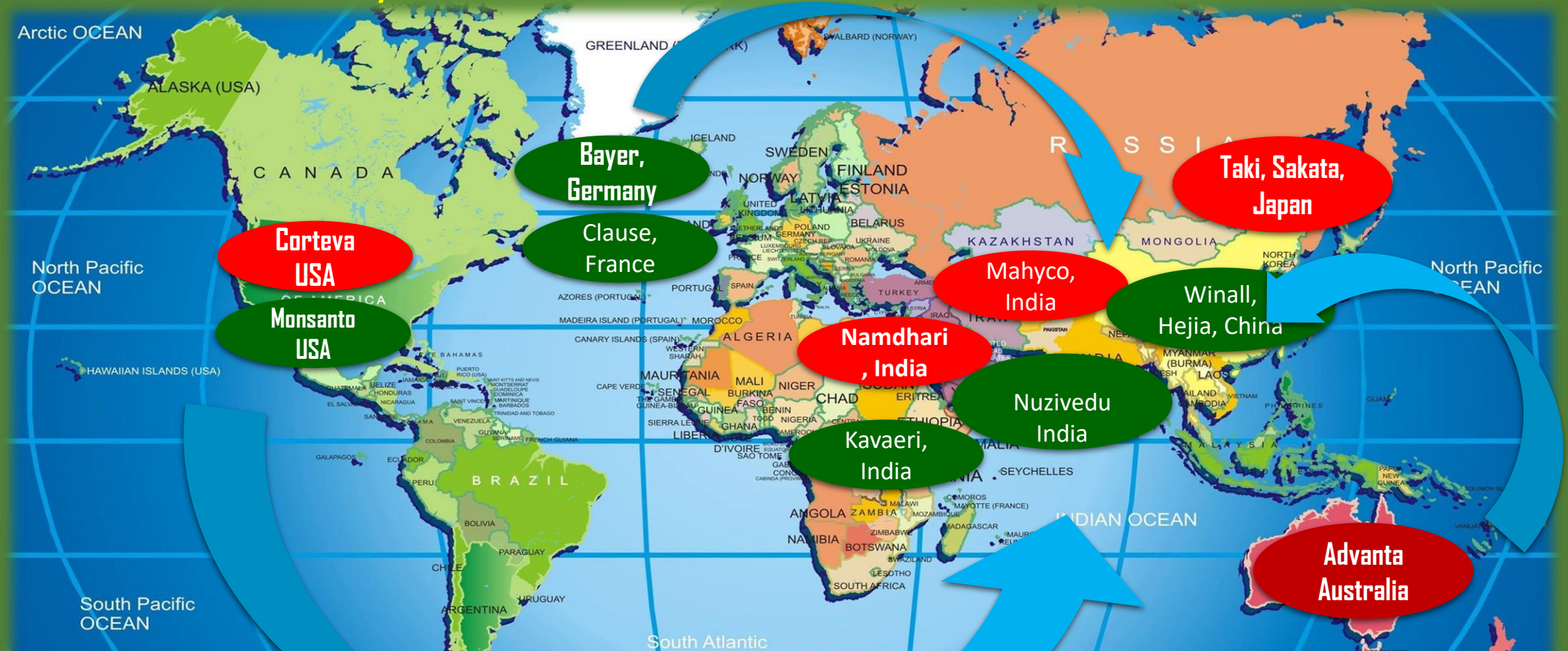
Vegetable

- Over 600 hybrid of different crops developed by Private Sector
- Public Institutes also contributing
- High Yielding, Short Duration, Consumer preference, climate smart, Marketable Quality etc

Research & Innovations

Seed Industry Association with Top **MNC's and Research Partners**

IRRI, CIMMYT, CIP, AVRDC Connectivity with Both Public & Private Sectors



Private sector closely work with MNCs for supplying superior quality seed of improved crops varieties

Global top 08 Seed Companies are operated seed business in Bangladesh

Public & Private sector also connected with Top Global Research institutes

Seed Infrastructure Development in Bangladesh



Public Dominating, Private Sector also Contributing

Research & Development

- Public Delight
- Private companies also developed Molecular facilities & experienced breeder, Own PDS Facilities



Seed Multiplication

- Public dominating infrastructure
- Private Sector having 50000 contract growers network
- 3000 skilled production HR



Seed Processing & Storage

- Conditional & ambients storage, seed grading and processing facilities



Seed Quality Control

- ISTA Accredited Under Progress
- Skilled manpower and testing facilities available



Packing & Branding

- Modern automated packing facilities for vegetable seed
- Private sector has proven experienced



Marketing

- Mostly in Private Sector
- However, public sector also involved with



Distributions

- Rented, Own or Courier
- Over 35000 dealer, 180,000 retailer



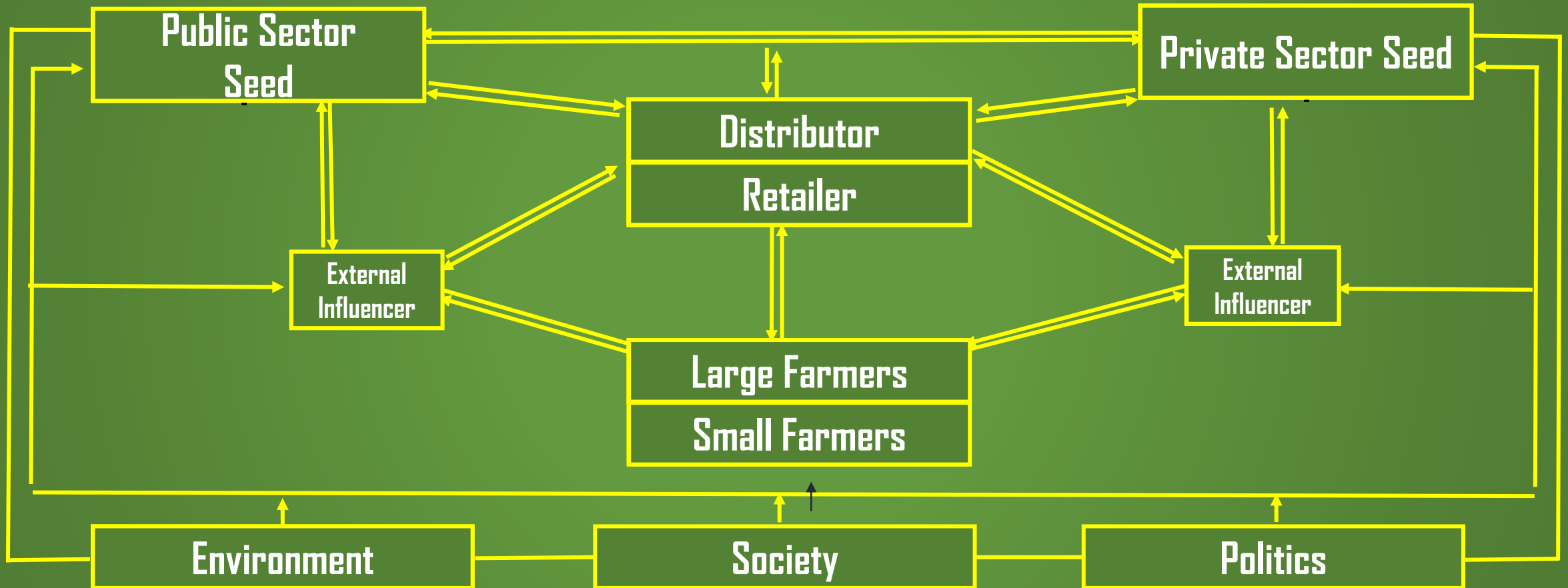
Sales

- Public with subsidies Offering
- Competitive Private Sector
- Over



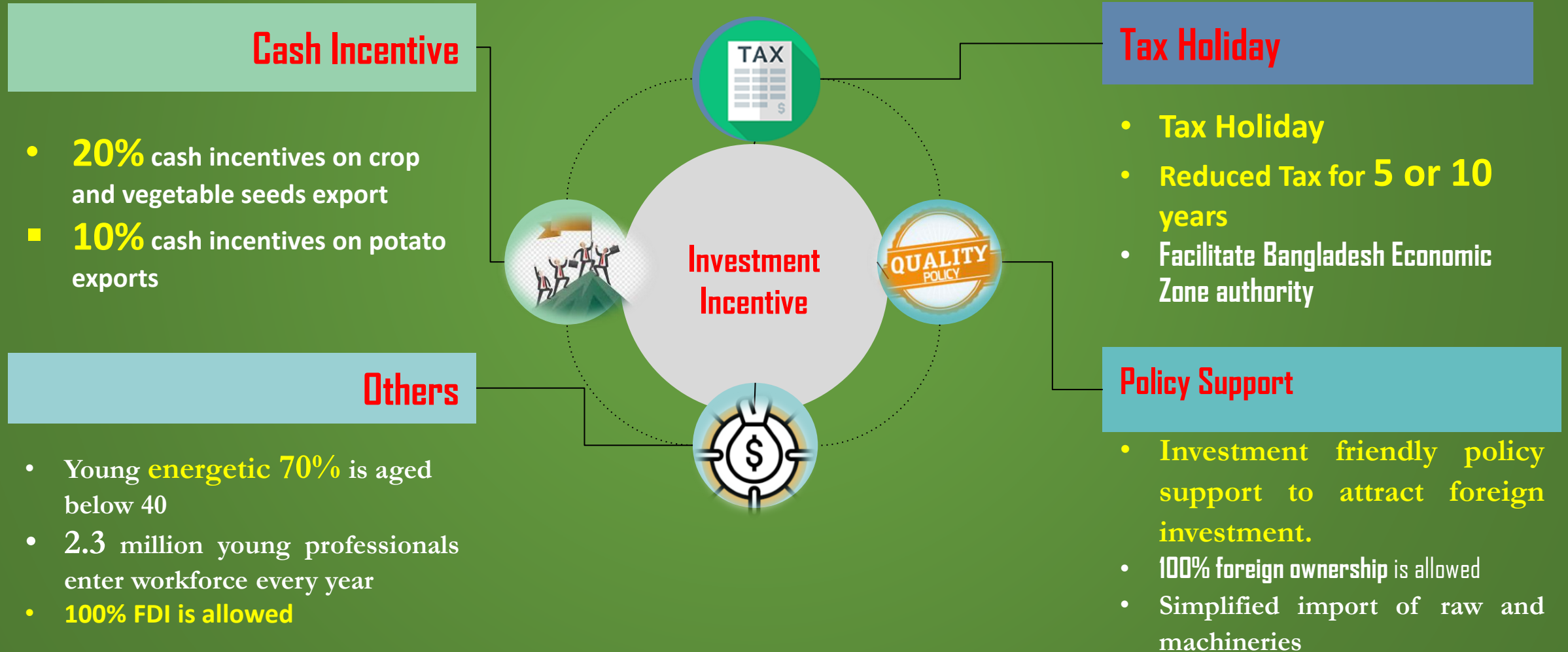
Input Marketing **System**

Public Dominating, Private Sector also Contributing



Investment Incentive in Seed Industry

Bangladesh Potential Seed Market Size **1.5 BN USD by 2031** , CAGR: 6%



Investment Opportunities in Seed Industry

Current Scenario:

Current Market: 0.85 BN USD

Import & Domestic:
Ratio: 4:6

Last Five Years
Growth: 5.8%

Potential Scenario:

Market: 1.1 BN USD by 2025

Import & Domestic:
Ratio: 3:7

Growth Rate in next Five
years: 6%

New Opportunities:

Investment in Marketing & Distribution

Export & Toll Production

Investment in Seed Grading and Processing

Joint Venture & Technical Collaboration

FDI, JV & Market Presence:

100% FDI allowed

TOP MNC's presence in Bangladesh, Bayer, Syngenta, EWS, Advanta, Corteva etc

Rice, Maize, Jute, Potato, Wheat Vegetable, Fruits, Flower, pulse & Oil, Spices, Ornamental Plants, Processing, Preservation, Value addition, forward linkage

Investment Opportunities in **Research & Development**

Current Scenario:

Mostly Public & Marginally Private

Research focused on Crop Breeding

Limited Research for Practices, Post harvest & Processing

Potential Scenario:

Opportunity for Private Research

Research on Plant Genetics

Research on Practices, Post Harvest & Processing

New Opportunities:

Investment in Plant Research and Capacity Development

Consultancy, Technical Collaboration, Joint Venture

FDI, JV & Dev Fund:

Foreign Development Funds
USAID, SIDA, Bill & Millinda Gates Foundations, CARE, Jaica , SNV etc

Genetic transformation by using molecular techniques
Cutting edge , genome editing techniques for speed Breeding
Nutritional breeding
Precision Agriculture & Variety Breeding

Challenges in Seed Industry Development

Major Challenges



Lack of Data



High Cost Finance



Access to Land



Access to Germplasm



HR Development



Seed Infrastructure



Continuous Policy Support



Promotion and Communication

Recommendations

Soft loan support for establishing state of the art processing and QC facilities

Appropriate interpretation & realistic application of regulations

Strengthening private sector for investment in breeding through incentive

Encouraging PPP for Promoting germplasm, scientists, and modern variety development

Certifications coarse for the dealer and extension worker

Promoting Seed export through appropriate Policy Support

Extension should Support both public and private technologies

Access to Public Seed processing and storage facilities for private sector in Low Cost

Budget Provision for strengthening R&D Activities

De-regulations on notified kind of crops of production, import and export.



BSA

Thank You

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