Enabling the Business of Agriculture 2019
Mobilizing private investment in agriculture

**SDGs**

- 4.5 trillion/year needed
- 140 billion/year provided by development assistance
- 4 billion/year provided by philanthropists

**Agriculture**

- 140 billion/year needed in additional financing
- 90 billion/year needed from public sector
- 50 billion/year needed from private sector

**Layers of support:***

- Policies
- Regulatory framework
- Institutions
- Support services
- Infrastructure
- Social capital
Role of (balanced) regulations

Order & information (e.g. registries or catalogs)
Safety (e.g. food or tractor safety)
Quality & standards (e.g. seed or fertilizer)
Property (e.g. land or intellectual property rights)
Environmental safeguards (e.g. water extraction)

Excessive costs (e.g. high business entry costs)
Burdensome processes (e.g. decreased trade volumes)
Informality (e.g. increased unregistered inputs)
Reduced access (e.g. limited access to financial services)
Impact of regulations on value chain players

Terrain of Sustainable Agribusiness
Impact of regulations on farmers

- Warehouse operators
- Seed companies
- Fertilizer companies
- Phytosanitary offices
- Veterinary medicine producers
- Pest-control offices
- Feed producers
- Water management institutions

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FARMER

- Healthy crops
- Access to credit
- Available, affordable inputs
- Market access
- Reliable feed, VMPs
- Access to water
Indicators 2019

- Supplying Seed
- Registering Fertilizer
- Securing Water
- Registering Machinery
- Sustaining Livestock
- Protecting Plant Health
- Trading Food
- Accessing Finance
Indicators 2019

EFFICIENCY
Processes as experienced by the private sector in complying with legal and regulatory requirements

QUALITY
Public regulations, other legal texts of general application, judicial decisions and administrative rulings
Countries with stronger regulations tend to implement them more efficiently.
Thematic coverage 2019

- **Seed**
  - Supplying Seed
  - Seed data

- **Fertilizer**
  - Registering Fertilizer
  - Fert data

- **Machinery**
  - Registering Machinery
  - Mach data

- **Water**
  - Securing Water
  - Water data

- **Markets**
  - Protecting Plant Health
  - Markets data

- **Finance**
  - Accessing Finance
  - Finance data

- **Livestock**
  - Sustaining Livestock
  - Livestock data

- **Transport**
  - Transport data

- **ICT**
  - ICT data
Data sources

Questionnaires

- Government officials from the relevant ministries
- Private sector and lawyers
- CSOs and academia

Desk Review and Validation

- Detailed desk review of laws, regulations, background material
- Validation with World Bank specialists from country offices

4,000
Enabling the Business of Agriculture assesses laws and regulations in agriculture. The data set identifies actionable reforms to remove obstacles for farmers seeking to grow their business. Read more.

Enabling the Business of Agriculture 2019

FEATURED TOPICS

Additional Data
Access additional data tailored to the range of users and researchers needs.

Supplying Seed
Examining policies and regulations that support the timely release of new seed by domestic farmers.

Registering Fertilizer
Examining laws and regulations that help domestic farmers gain access to high-quality fertilizers.

Registering Machinery
Examining regulatory processes that impact the use of agricultural machinery by domestic farmers.

DOwnLD DATA
Download the full set of economic Enabling the Business of Agriculture data.

METHODOLOGY
How are data collected?

COLLABORATION
A wide range of stakeholders provide insights into the enabling the business of agriculture data.

Read more.
EBA 2019 country profiles

Enabling the Business of Agriculture

India

Country Data

Region: South Asia
Income Group: Lower middle income
Population: 123,158,747
GNI Per Capita (USD): 1,820

Topic Data

<table>
<thead>
<tr>
<th>Topic</th>
<th>Score</th>
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<tbody>
<tr>
<td>Supplying Seed</td>
<td>72.14</td>
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<tr>
<td>Registering Fertilizer</td>
<td>57.81</td>
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<tr>
<td>Securing Water</td>
<td>20.00</td>
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<tr>
<td>Registering Machinery</td>
<td>19.96</td>
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<tr>
<td>Sustaining Livestock</td>
<td>53.33</td>
</tr>
<tr>
<td>Protecting Plant Health</td>
<td>60.00</td>
</tr>
<tr>
<td>Trading Food</td>
<td>74.00</td>
</tr>
<tr>
<td>Accessing Finance</td>
<td>60.00</td>
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</tbody>
</table>
Overview of results
Tracking reforms

67 reforms
47 countries

SSA
most reforming region

> 50% reforms
SEED
PLANT HEALTH
FINANCE
<table>
<thead>
<tr>
<th>AREA OF REFORM</th>
<th>NUMBER OF REFORMS</th>
<th>COUNTRIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Protecting plant health</td>
<td>15</td>
<td>Armenia, Brazil, Burkina Faso, Burundi, Colombia, Denmark, Georgia, Ghana, Greece, Korea, Rep., Nepal, Rwanda, Sri Lanka, Thailand, Ukraine</td>
</tr>
<tr>
<td>Accessing finance</td>
<td>13</td>
<td>Burundi, Georgia, Jordan, Kazakhstan, Lao PDR, Liberia, Malawi, Mexico, Pakistan, Philippines, Sri Lanka, Tajikistan, Uganda</td>
</tr>
<tr>
<td>Supplying seed</td>
<td>10</td>
<td>Bangladesh, Burundi, Haiti, Honduras, Kenya, Malaysia, Niger, Sierra Leone, Tanzania, Uruguay</td>
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<tr>
<td>Securing water</td>
<td>8</td>
<td>Armenia, Guatemala, Kenya, Korea, Rep., Lao PDR, Malawi, Morocco, Sierra Leone</td>
</tr>
<tr>
<td>Trading food</td>
<td>8</td>
<td>Bangladesh, Côte d’Ivoire, Dominican Republic, Nigeria, Peru, Rwanda, Turkey, Uganda</td>
</tr>
<tr>
<td>Sustaining livestock</td>
<td>7</td>
<td>Burkina Faso, Chile, Georgia, Kenya, Nigeria, Sierra Leone, Vietnam</td>
</tr>
<tr>
<td>Registering fertilizer</td>
<td>5</td>
<td>Armenia, Benin, Mozambique, Serbia, Tanzania</td>
</tr>
<tr>
<td>Registering machinery</td>
<td>1</td>
<td>Kyrgyz Republic</td>
</tr>
</tbody>
</table>
Country scores

MADAGASCAR

- Supplying seed: 7.41
- Registering fertilizer: 0.00
- Securing water: 50.00
- Registering machinery: 90.75
- Sustaining livestock: 18.33
- Protecting plant health: 40.00
- Trading food: 43.61
- Accessing finance: 40.00

EBA 2019
Country scores

MADAGASCAR

Supplying seed: 7.41
Registering fertilizer: 0.00
Securing water: 50.00
Registering machinery: 90.75
Sustaining livestock: 18.33
Protecting plant health: 40.00
Trading food: 43.61
Accessing finance: 40.00
Seed data

- Access to plant genetic material in public genebanks
- Acceptance of foreign testing and registration
- Accreditation of third party seed certification
- Random market inspections

MADAGASCAR

Country scores

Supplying seed: 7.41

Registering fertilizer
Securing water
Registering machinery
Sustaining livestock
Protecting plant health
Trading food
Accessing finance
EBA Seed

Plant Breeding
- Protection of plant material by intellectual property rights
- Plant breeder rights exceptions
- Plant breeder records of material and/or suppliers
- Access to plant genetic material in public genebanks
- Testing requirements of imported germplasm
- Licensing of protected varieties for production and sale
- Private production of early generation seed from public varieties

Variety Registration
- Acceptance of foreign testing and registration
- Dynamics of variety release committee
- Updated variety catalogue
- Registration of farmer/local varieties
- Efficient variety registration (time and cost)

Seed Quality Control
- Accreditation of seed companies for certification activities
- Availability of official fee schedules for seed certification
- Comprehensive seed container labelling
- Post-control testing (field and lab) of certified seed
- Efficient variety registration (time and cost)
- Random market inspections
- Penalties for the sale of mislabeled seed bags

Countries:
- Ethiopia
- Kenya
- Malawi
- Uganda
- Zambia
- Bolivia
- Panama
- Lao PDR
- Mozambique
- Rwanda
- Senegal
- Tanzania
- Zimbabwe
- Cambodia
- Nicaragua
- Angola
- Burundi
- Cameroon
- Egypt
- Guatemala
- Nepal
- Nepal
- Peru
- Vietnam

Dynamics of variety release committee
Updated variety catalogue
Registration of farmer/local varieties
Efficient variety registration (time and cost)
Post-control testing (field and lab) of certified seed
Random market inspections
Penalties for the sale of mislabeled seed bags
Use of EBA

Indicator development → Data collection → Scoring → Report production → Dissemination → Technical discussions → Policy analysis/dialogue → Reform support

WORLD BANK GROUP

CLIENT COUNTRIES

Feedback
Targeting country-level policy dialogue and planning
Use of EBA

Dissemination event/activity
- Cote d’Ivoire
- Kyrgyzstan
- Madagascar
- Myanmar
- Nicaragua
- Pakistan
- Philippines
- Senegal
- Sri Lanka
- Tajikistan
- Uzbekistan

Technical workshop/discussions
- Cameroon
- Ethiopia
- Nepal
- Turkey
- Zambia
- Zimbabwe

Formal interest
- Ghana
- India
- Lao PDR
- Liberia
- Mozambique
- Nigeria
- Rwanda
- Tanzania

Operational project
- Burkina Faso
- Burundi
- Cambodia
- Iraq
- Jordan
- Kenya
- Mali
- Myanmar
- Uganda

Reforms
- Honduras
- Kazakhstan
- Lao PDR
- Malawi
- Nigeria
- Rwanda
- Sudan
- Zimbabwe
- Vietnam
Use of EBA

**REFORM PROGRAMS**
- Burkina Faso
- Mali
- Ethiopia
- Mozambique
- Ghana
- Nigeria
- Kazakhstan
- Tanzania
- Kenya
- Uganda
- Malawi
- Zimbabwe

**REGIONAL COLLABORATION**
- AfDB
- AGRA
- GrowAsia
- IFPRI - ReSAKSS
- Oxfam
- WB AgGP AAPU

**OPERATIONAL PROJECTS**
- Benin
  - Ag Competit & Export Divers Project
- B. Faso
  - Ag Resilience & Competit Project
- Burundi
  - Great Lakes Reg Ag Dev Project
- Cambodia
  - Ag Diversification Project
- Guinea
  - AgBuz Development Project
- Honduras
  - Integr Innov for Rural Competitiveness
- Kyrgyzstan
  - AgBuz Value Chain Dev (ASA)
- Lao PDR
  - Ag Competit Project
- Liberia
  - Smallholder Ag Transformation & AgBuz Revitalization Project
- Malawi
  - Ag Support & Fiscal Management DPO
- Nepal
  - Rural Econ & Enterprise Development
- Rwanda
  - Transformation Ag Sec Program (P4R)
- Tanzania
  - Closing Ag Gap (ASA)
- Uganda
  - Closing Ag Gap (ASA) & Uganda DPO
- Zimbabwe
  - Ag Sector Support Program (TA)

**NATIONAL STRATEGIES**
- Cambodia
- Mozambique
- Rwanda
- Tanzania
- Zimbabwe

**GOVERNMENT EBA WORKING GROUPS**
- Cambodia
- Kazakhstan
- Kenya
- Malawi
- Nepal
- Vietnam
- Zimbabwe

*Evidence on causality varies in nature.*
# Use of EBA

<table>
<thead>
<tr>
<th>Government Teams / Mechanisms</th>
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<tbody>
<tr>
<td>Cambodia</td>
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<td>Kazakhstan</td>
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<td>Kenya</td>
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<td>Tanzania</td>
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<td>Nepal</td>
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<tr>
<td>Vietnam</td>
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<tr>
<td>Zimbabwe</td>
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</tbody>
</table>

- **Tech Working Group for Ag & Water**
- **Ad Hoc Working Group**
- **Permanent Secretaries**
- **Parliamentary Ag Committee**
- **Ad Hoc Committee / SAGCOT**
- **National Planning Commission**
- **Institute for Policy and Strategy for Agriculture and Rural Development**
- **Central Institute for Economic Management**
- **Ag Tech Working Group**
EBA integration into Bank-financed Projects

Lao PDR Agriculture Competitiveness Project ($24 m)- under implementation
- Promoting adoption of good seed varieties
- Improving the enabling environment

Honduras Integrating Innovations for Rural Competitiveness Project ($75 m)- under implementation
- Improve the regulatory framework and institutional capacity for enabling agribusiness competitiveness.

Guinea Agribusiness Development Project ($175 m)- under preparation
- Improving the business environment
- Improving market Access through phytosanitary system
Use of EBA

**VIETNAM**
EBA machinery indicators were used to reform laws and regulations related to tractor dealers, standards and imports, reflected in increased 2017 scores.

**LAOS**
The new Agriculture Commercialization Project, which aims to facilitate private sector investment in the sector to enhance agricultural markets addresses a number of issues highlighted by EBA findings.

**TANZANIA**
EBA indicators and targets were incorporated into the 2017 version of the National Agriculture Investment Plan and as a Disbursement Linked Indicator for our P4R/PSTA4/National Agriculture Policy (FY2018)

**UGANDA**
To identify priority actions for future Bank support, EBA indicators are being used to assess the regulatory environment for agribusiness, as part of a larger review of Uganda’s agriculture sector using existing studies and data (FY2018).

**KENYA**
EBA indicators are being used to analyze and identify potential improvements in the enabling environment in order for the country to prepare for providing China’s growing food imports.

**RWANDA**
EBA machinery indicators were used to reform laws and regulations related to tractor dealers, standards and imports, reflected in increased 2017 scores.

**MALAWI**
EBA findings have been driving discussions with the Parliament’s Ag Committee on reform plans, which are being supported by ASWAp SP, APPSA, USAID, FCI work and an upcoming Agricultural Commercialization Project.

**ZIMBABWE**
EBA indicators are being used by the technical working group of the Rapid Results Initiative at the Office of the President and Cabinet to undertake regulatory reforms to improve the enabling environment for doing business in Zimbabwe’s agriculture sector.