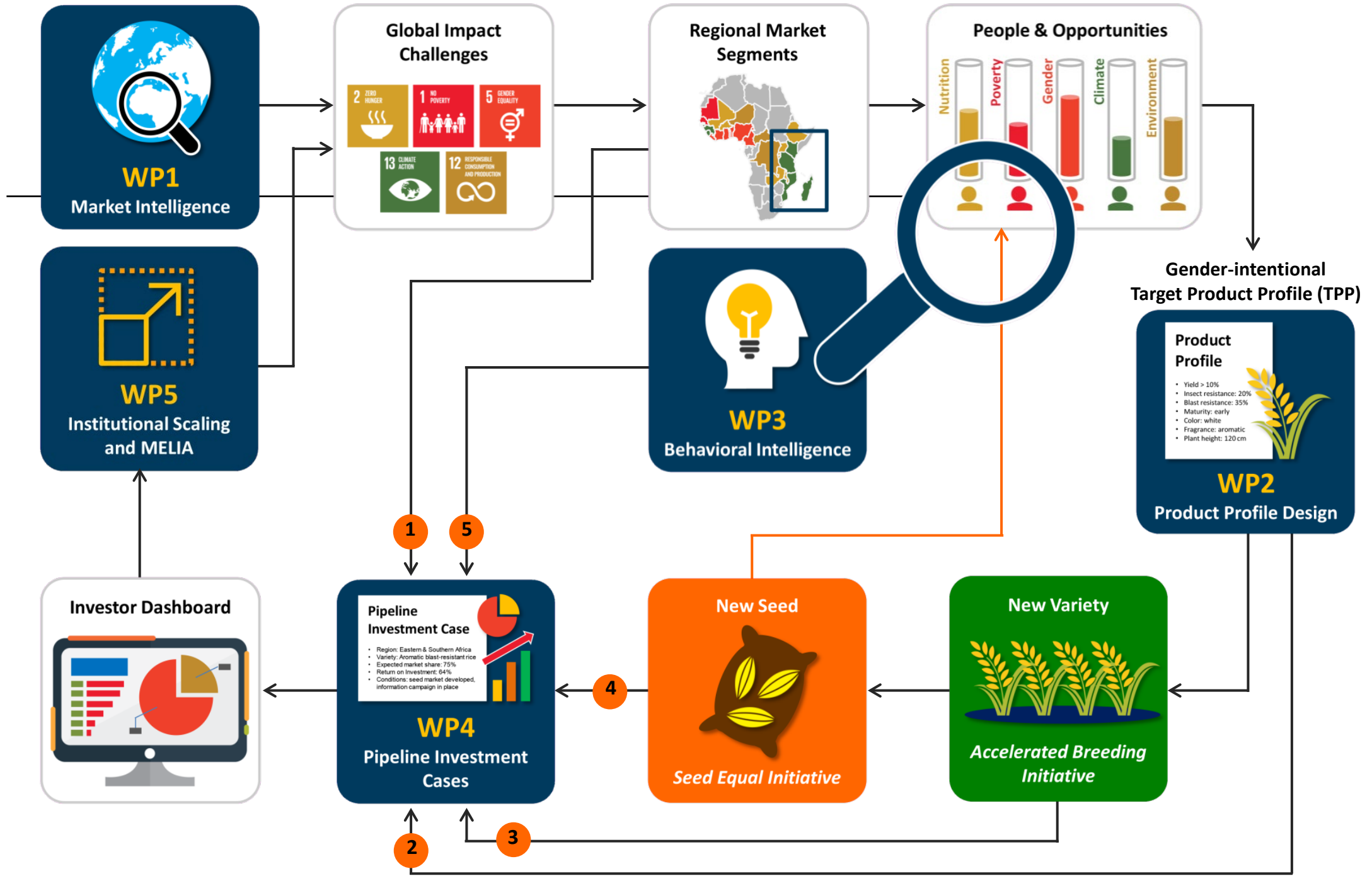# Market Intelligence- 2022 in numbers

Market Intelligence – geographic focus of results

Global Market Intelligence Platform

- ✓ **Cross-crop portfolio** approach
- ✓ **One-stop shop** for sharing, exchanging and crowd-sourcing market intelligence
- ✓ **1st Fusion Product Team**: co-developed with CGIAR Initiatives on Foresight, Digital Innovation and CGIAR Digital & Data
- ✓ **Priority setting** information and **feedback hub**
- ✓ Hosted online by **CGIAR target audience** (CGIAR and NARES researchers, GI management, donors, investors)
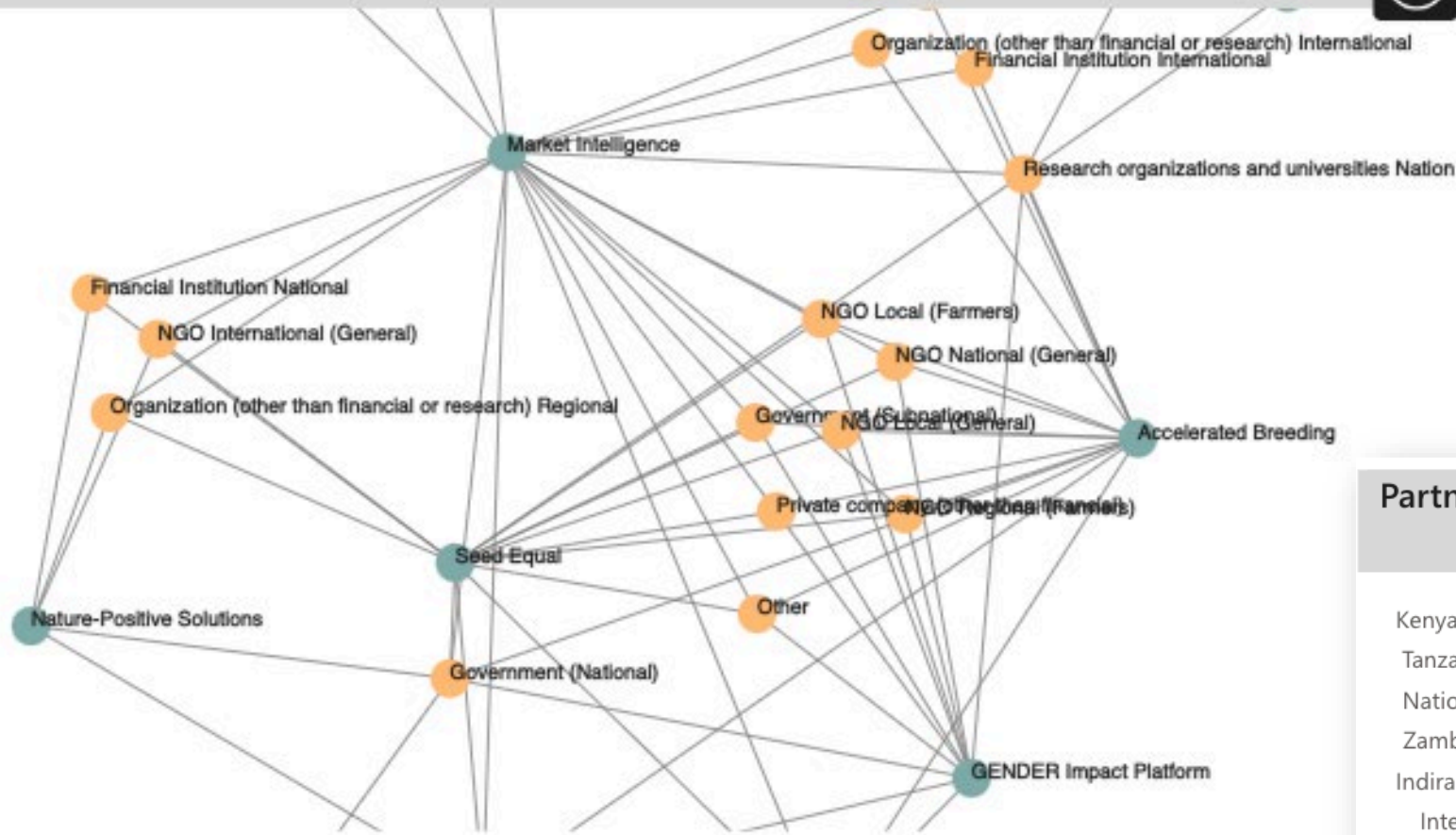
Number of Results
28
2

28 results reported in Kenya, most of them Capdev activities
Contributing to SDG 1, SDG 2, SDG 5, SDG 12 and SDG 13

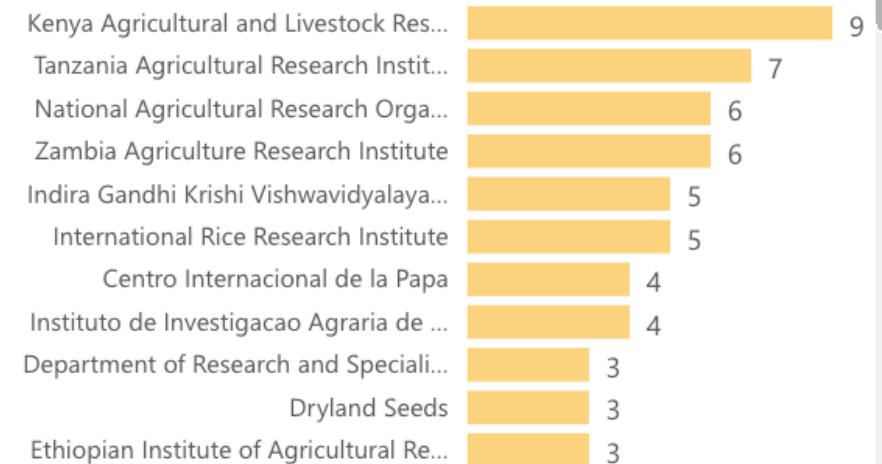**19** results reported in United Republic of Tanzania, most of them Capdev activities
Contributing to SDG 1, SDG 2, SDG 5, SDG 12 and SDG 13

Map displays countries with 2 or more results

Market Intelligence – partners

Partner network

Organization (other than financial or research) International
Financial Institution International
Market Intelligence
Research organizations and universities Nation
Financial Institution National
NGO International (General)
NGO Local (Farmers)
NGO National (General)
Organization (other than financial or research) Regional
Government (Subnational)
NGO Local (General)
Accelerated Breeding
Private company
NGO Regional (Farmers)
Seed Equal
Other
Nature-Positive Solutions
Government (National)
GENDER Impact Platform

Partner organizations in delivery capacity sharing for development

Organization	Value
Kenya Agricultural and Livestock Res...	9
Tanzania Agricultural Research Instit...	7
National Agricultural Research Orga...	6
Zambia Agriculture Research Institute	6
Indira Gandhi Krishi Vishwavidyalaya...	5
International Rice Research Institute	5
Centro Internacional de la Papa	4
Instituto de Investigacao Agraria de ...	4
Department of Research and Speciali...	3
Dryland Seeds	3
Ethiopian Institute of Agricultural Re...	3

Market Intelligence – progress

Work Package	Progress	Key highlights
1. Market Intelligence	**On track**	• **CGIAR Seed Product Market Segment Database v1.0** made available; **>400** Seed Product Market Segments (SPMS) identified for **25** crops by **8** centers in 10 CGIAR sub-regions, based on **uniformly** applied 8-point criteria • **Video-based Product Concept Testing** method developed • *Market Intelligence Brief* series launched; first *Market Intelligence Brief* aiming to harmonize definitions in market intelligence across GI Initiatives
2. Target Product Profile (TPP) Design	**On track**	• **TPP Design SOP** applied by **142** CGIAR and **9** partner breeding programs to co-design **379** gender-intentional TPPs for **470** Market segments identified at Sub-regional and country level for all CGIAR mandate crops • SOP transferred to **NARES** in Uganda, Tanzania, DRC, Sierra Leone, Mali, Chad and Nigeria
3. Behavioral Intelligence	**On track**	• **Leveraging** 6 bilateral grants, multi-country multi-crop RCT designed to unravel constraints to varietal uptake • 6 field experiments in Uganda, Nigeria, Ethiopia, India and Kenya **co-created** with NARES, NGOs, seed companies • Literature review on behavioral constraints to varietal adoption and on strategies to increase **uptake** of new varieties
4. Pipeline Investment Cases	**On track**	• Implemented 4 teams: **GLOBAL** team focusing on global CGIAR portfolio of breeding pipelines, and 3 Impact Area teams: **NUTRITION**, **EQUITY** and **PLANET** • **Priority Setting Dashboard for Genetic Innovation v1.0** features **110** impact opportunity indicators across **5** Impact Areas, aggregated by **6** CGIAR Regions, **18** sub-regions, **9** Centers, **24** CGIAR crops, **25** non-CGIAR crops, **119** pipelines, **428** SPMS & **180** countries
5. Institutional Scaling and MELIA	**On track**	• **3 MELIA studies designed and launched**: a) incentives and potential to use MI data for priority setting, b) behavioral experiment on use of MI data, c) randomized trials to test potential adoption and impacts of MI informed varieties • **MELIA workshop** held in November 2022 to adjust ToC and plan 2023 activities

Market Intelligence – 2022 key results

Output Results Categories

- Knowledge products
- Innovation development
- Capacity sharing for development
- Other outputs

Pie chart values: 44, 99, 62, 17

INNOVATION TYPE

TECHNOLOGICAL INNOVATION	POLICY, ORGANIZATIONAL OR INSTITUTIONAL INNOVATION	CAPACITY DEVELOPMENT INNOVATION	OTHER
64	26	7	2
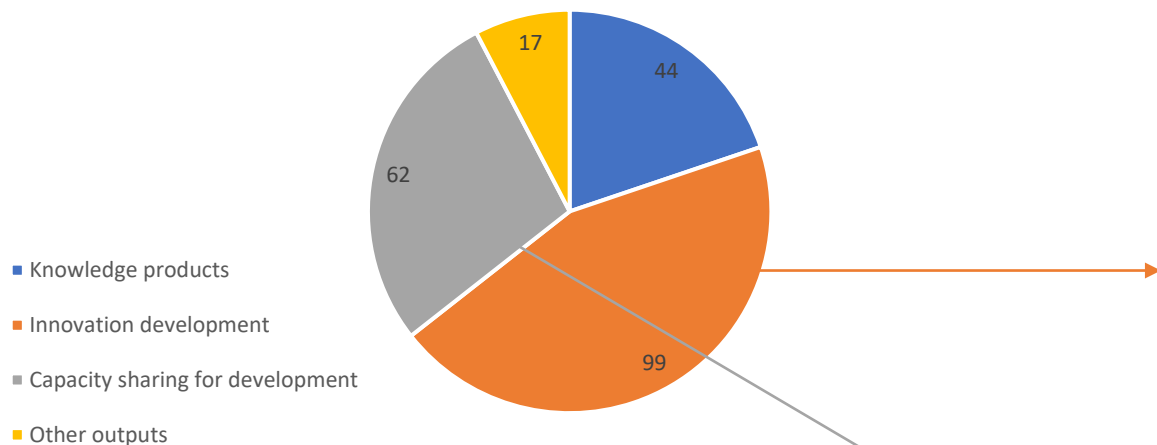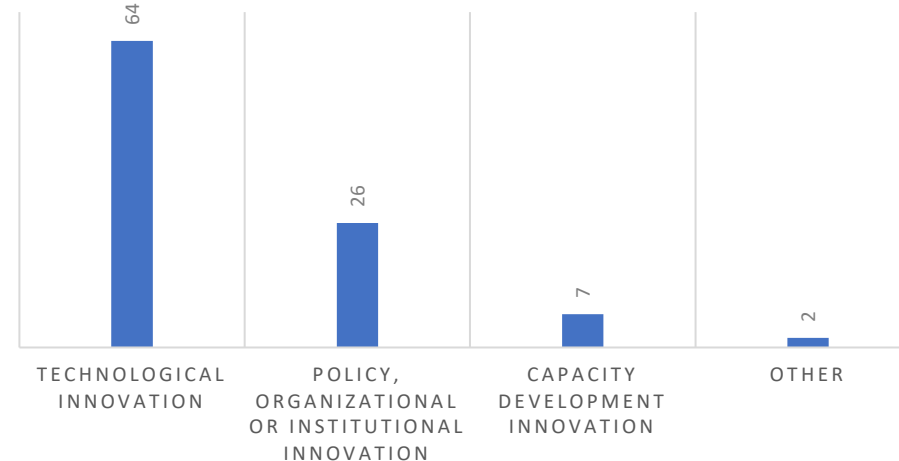
TOTAL of **229** results

Outcome Result Categories

- Innovation use
- Capacity change

Pie chart values: 3, 4
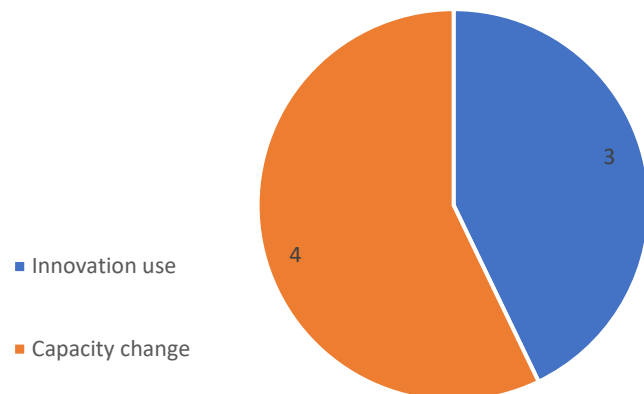
In total, 5,131 people trained

● Female ● Male

2,251
2,880
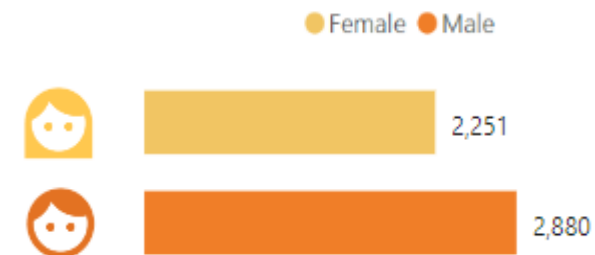
Search Toolbox

Keywords / authors

Type

- Any -

Topic

- Any -

Search

Clear search filter

Quick links

Toolbox Home

Search result

CGIAR Seed Product Market Segment Database

🔧 **Tools**

🟢 **Product design and management**

The Seed Product Market Segment Database (SPMSD) identifies and describes over 400 seed product market segments. These segments cover 25 crops across ten subregions where CGIAR and NARES currently target investments in crop breeding and seed systems. For each segment, the database presents uniformly applied descriptors that describe the opportunity for impact and a target product profile (TPP) that presents the basic design elements of products for that segment.

This systematic approach – based on the identification of SPMS, description of the opportunity of each segment, matched to a unique TPP – offers a comprehensive framework for the prioritization of investment decisions and seed product design.
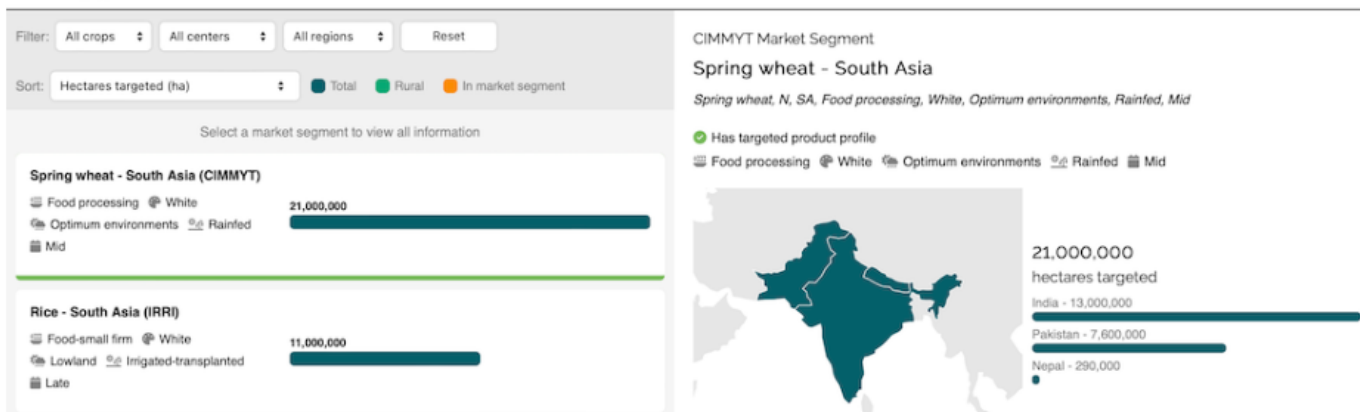
Global Market Intelligence Platform
CGIAR

Market Segments | **Impact Opportunities** | Target Product Profiles | Investor Dashboard | Product Catalog | Impacts

Impact Opportunities

Impact Area:
- ☑ Nutrition, health and food security
- ☑ Poverty reduction, livelihoods and jobs
- ☑ Gender equality, youth and inclusion
- ☑ Climate adaptation and mitigation
- ☑ Environmental health and biodiversity
- ☑ Cross-cutting

Scaling level:
- ● National/crop
- ○ Market segment
- ○ Breeding pipeline

Grouping:

UN Regions ▼

Crop:

All crops ▼

5 Impact Areas & **1** cross-cutting category

110 "Impact Opportunity" indicators (46 Breadth & 64 Incidence indicators), measuring the "exposure" to Impact Challenges (correlation)

Global or **CGIAR**-targeted view using Impact Area-specific statistical **downscaling** methods

9 aggregation levels: UN regions, CGIAR regions, UN sub-regions, crop groups, crops, Centers, Market Segments, Breeding Pipelines, countries

24 CGIAR crops & **25** non-CGIAR crops

Visualization: single-indicator treemaps & global maps, & multiple-indicator area (portfolio, meta-analysis) graphs

Female population (*n*) under poverty line reached by **CGIAR Seed Product Market Segments**

Female population that lives with < $1.90 a day (2011 PPP), 2022 (sum of market segment-level data scaled down from national-level data using production value shares)

3e+06
2e+06
1e+06
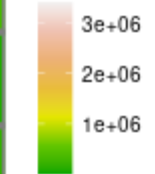
Preliminary results; please do not quote or share

Breadth indicators (top 15 shown)

Relative magnitudes

Cassava, Southern Africa

Groundnut, West Africa
Yam, West Africa

Rice, South Asia

Rice, Southeast Asia

Spring wheat, South Asia

Legend:
- Cassava, Southern Africa, Food (Fresh and dried roots), white, rainfed, NAp, Subhumid lowland tropics and semi-arid lowland tropics
- Cassava, West Africa, Processing granulated and paste for human consumption, NAp
- Chick pea, South Asia, Food (flour, raw, split and roasted dhal), light brown/brown, rainfed, early/medium & long, Warm tropics, warm subtropical humid and warm tropics subhumid
- Groundnut, West Africa, Dual purpose, red/tan, rainfed, early, Sahel, Sudan, Northern Guinea Savanahs
- Maize, Southern Africa, Food white, rainfed, intermediate & late, Dry/wet mid-altitudes and transition ecologies
- Rice, South Asia, Long soft, white, transplanted; rainfed, medium, Lowland Drought Prone
- Rice, South Asia, Long soft, white, transplanted; rainfed, medium, Lowland Flood Prone
- Rice, South Asia, Medium Soft, white, transplanted; irrigated, early, Lowland Normal
- Rice, South Asia, Small Firm, white, transplanted; rainfed, late, Normal
- Rice, South East Asia, Long Soft, white, transplanted; irrigated, medium, Lowland Normal
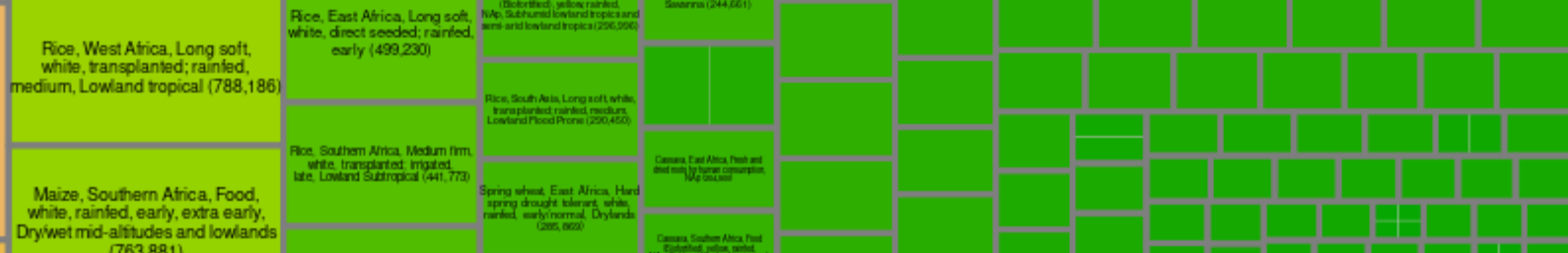- Spring wheat, South Asia, Spring wheat, white, rainfed, early, Drought prone environments
- Spring wheat, South Asia, Spring wheat, white, rainfed, early, High temperature environments
- Spring wheat, South Asia, Spring wheat, white, rainfed, normal, Optimum environments
- Spring wheat, West Asia, Hard spring, white, rainfed, early/normal, Drylands
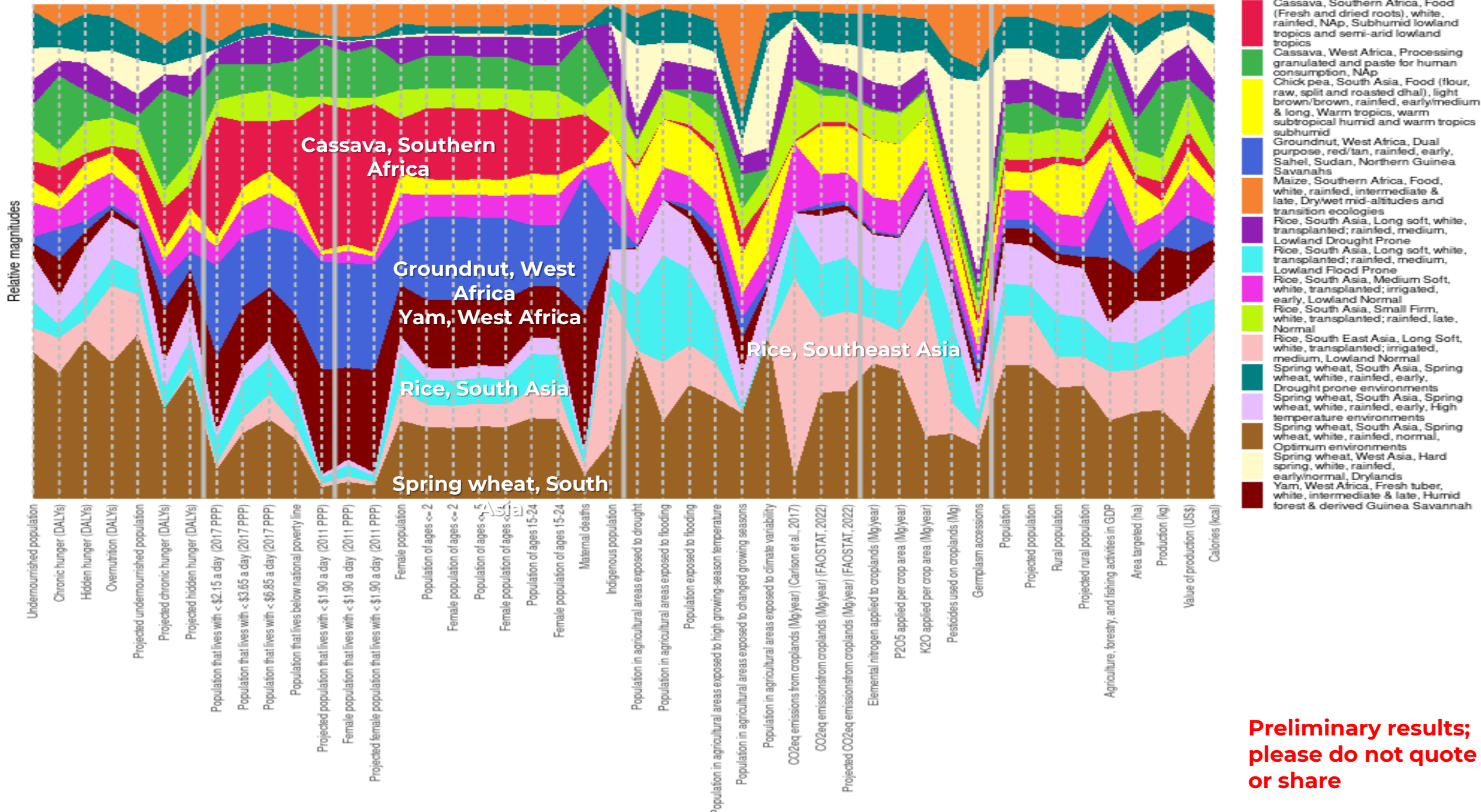- Yam, West Africa, Fresh tuber, white, intermediate & late, Humid forest & derived Guinea Savannah

X-axis labels:
Undernourished population, Chronic hunger (DALYs), Hidden hunger (DALYs), Overnutrition (DALYs), Projected undernourished population, Projected chronic hunger (DALYs), Projected hidden hunger (DALYs), Population that lives with < $2.15 a day (2017 PPP), Population that lives with < $3.65 a day (2017 PPP), Population that lives with < $6.85 a day (2017 PPP), Population that lives below national poverty line, Projected population that lives with < $1.90 a day (2011 PPP), Female population that lives with < $1.90 a day (2011 PPP), Projected female population that lives with < $1.90 a day (2011 PPP), Female population, Population of ages <= 2, Female population of ages <= 2, Population of ages <= 5, Female population of ages <= 5, Population of ages 15-24, Female population of ages 15-24, Maternal deaths, Indigenous population, Population in agricultural areas exposed to drought, Population in agricultural areas exposed to flooding, Population exposed to flooding, Population in agricultural areas exposed to high growing-season temperature, Population in agricultural areas exposed to changed growing seasons, Population in agricultural areas exposed to climate variability, CO2eq emissions from croplands (Mg/year) (Carlson et al., 2017), CO2eq emissions from croplands (Mg/year) (FAOSTAT, 2022), Projected CO2eq emissions from croplands (Mg/year) (FAOSTAT, 2022), Elemental nitrogen applied to croplands (Mg/year), P2O5 applied per crop area (Mg/year), K2O applied per crop area (Mg/year), Pesticides used on croplands (Mg), Germplasm accessions, Population, Projected population, Rural population, Projected rural population, Agriculture, forestry, and fishing activities in GDP, Area targeted (ha), Production (kg), Value of production (US$), Calories (kcal)

Preliminary results; please do not quote or share