



# ENABLING THE BUSINESS OF AGRICULTURE



**WORLD BANK GROUP**

*April 2016*

# Global focus on agriculture



# EBA: genesis and timeline

2012

EBA  
Kick - off

2013-14

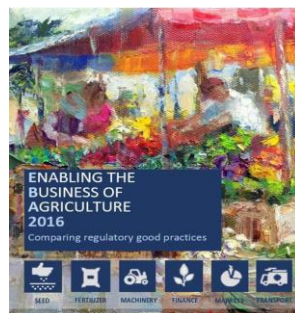
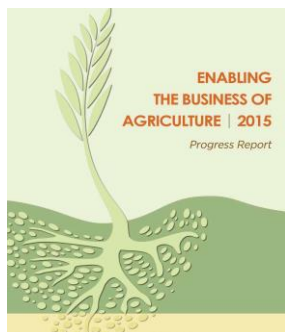
Pilot data  
collection in  
10 countries

2014-15

Data  
collection in  
40 countries

2016

Data  
collection in  
60 countries



DANIDA



BILL & MELINDA  
GATES foundation



Government of  
the Netherlands



# WBG Doing Business report



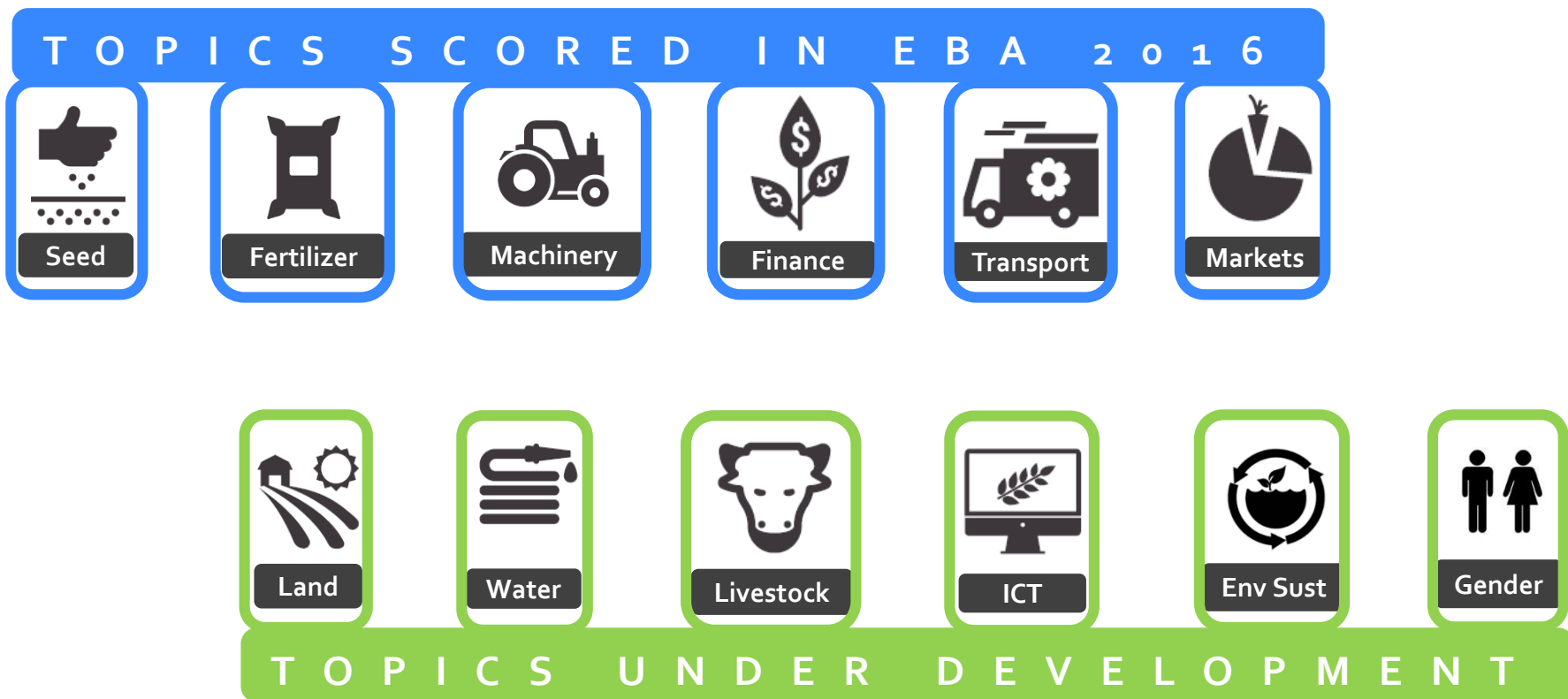
Inspired by the WBG *Doing Business* report, which has a recognized track record in measuring laws and regulations in 189 economies and leveraging reforms.

# A tool for improved policymaking



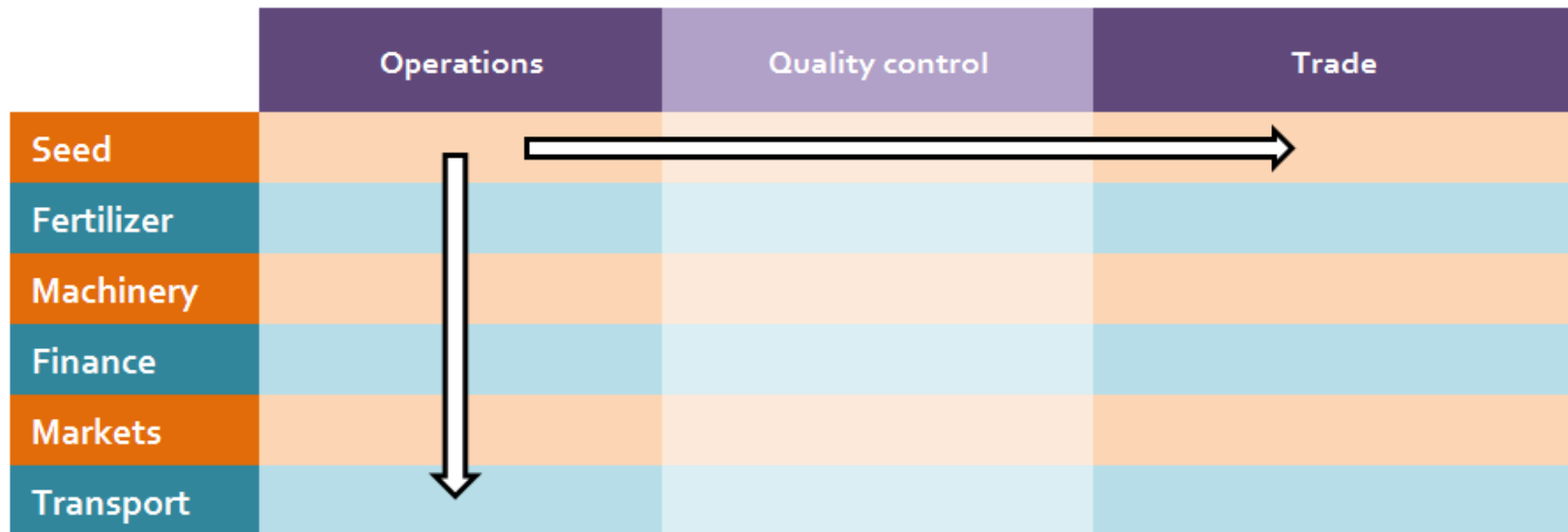
EBA can inform policymaking and trigger reforms  
based on cross-country benchmarking

# Thematic coverage



EBA benchmarks **markets**  
associated to activities along the **agribusiness value chain**

# EBA: regulatory areas benchmarked (1)

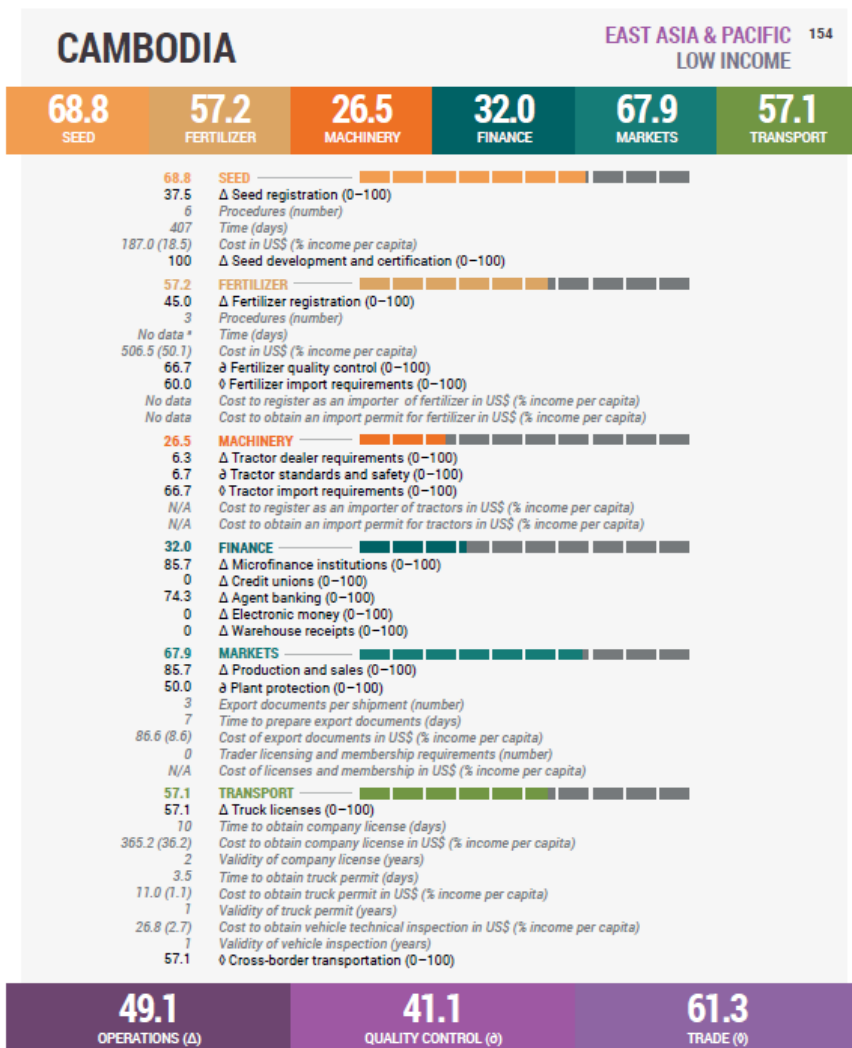


# EBA: regulatory areas benchmarked (2)

	Operations	Quality control	Trade
Seed	Seed registration (0-100) <i>Procedures, time &amp; cost</i> Seed certification (0-100)		
Fertilizer	Fertilizer registration (0-100) <i>Procedures, time &amp; cost</i>	Fertilizer quality control (0-100)	Fertilizer import requirements (0-100) <i>Cost of import permit and importer registration</i>
Machinery	Tractor dealer requirements	Tractor standards & safety (0-100)	Tractor import requirements (0-100) <i>Cost of import permit and importer registration</i>
Finance	Microfinance institutions (0-100) Credit unions (0-100) Agent banking (0-100) E-money (0-100) Warehouse receipts (0-100)		
Markets	Production & sales (0-100)	Plant protection (0-100)	<i>Agricultural exports Documents, time &amp; cost</i>
Transport	Truck licenses (0-100) <i>Time, cost &amp; validity of company licenses, truck permits and vehicle inspections</i>		Cross-border transportation (0-100)



## EBA: regulatory areas benchmarked (3)



The operations score is an average of seed, fertilizer, machinery, finance, markets and transport indicator scores indicated with a  $\Delta$ . The quality control score is an average of seed, fertilizer, machinery and markets indicator scores indicated with a  $\delta$ . The trade score is an average of fertilizer, machinery and transport indicator scores indicated with a  $\theta$ . a. No data on application for registration, but approval by committee takes 56 days.



# Country coverage

## SUB-SAH AFRICA

Burkina Faso  
Burundi  
Cote D'Ivoire  
Ethiopia  
Ghana  
Kenya  
Mali  
Mozambique  
Niger  
Rwanda  
Sudan  
Tanzania  
Uganda  
Zambia

**Liberia**  
**Benin**  
**Malawi**  
**Cameroon**  
**Senegal**  
**Zimbabwe**  
**Nigeria**

## ECA

Bosnia-Herzegovina  
Georgia  
Kyrgyzstan  
Russia  
Tajikistan  
Turkey  
Ukraine

**Armenia**  
**Romania**  
**Serbia**

## EAP

Cambodia  
Laos  
Myanmar  
Philippines  
Vietnam

**Malaysia**  
**Thailand**

## OECD

Chile  
Denmark  
Greece  
Poland  
Spain

**Italy**  
**Korea**  
**Netherlands**

## SA

Bangladesh  
Nepal  
Sri Lanka

**India**

## LAC

Bolivia  
Colombia  
Guatemala  
Nicaragua

**Haiti**  
**Mexico**  
**Peru**  
**Uruguay**

## MENA

Jordan  
Morocco

**Egypt**

# Data collection

## Public Sector

- Ministries of Agriculture, Transport, Environment, Trade and Commerce, Information and Technology
- Central Bank, Financial Supervisory Authorities
- Customs, State Inspectors, Land Registries, Cadasters, Agricultural Research Institutes and others

## Private Sector

- Agricultural Input Companies (Fertilizer, Machinery, Seed, Irrigation)
- Trucking companies
- Freight forwarders
- Cooperatives and Farmers' associations
- Agricultural Holdings
- Mobile Network Operators
- Lawyers
- Commercial Bankers and Microfinance Institutions



# Type of indicators



EBA indicators are based on identified good practices and are actionable

Fertilizer score 53

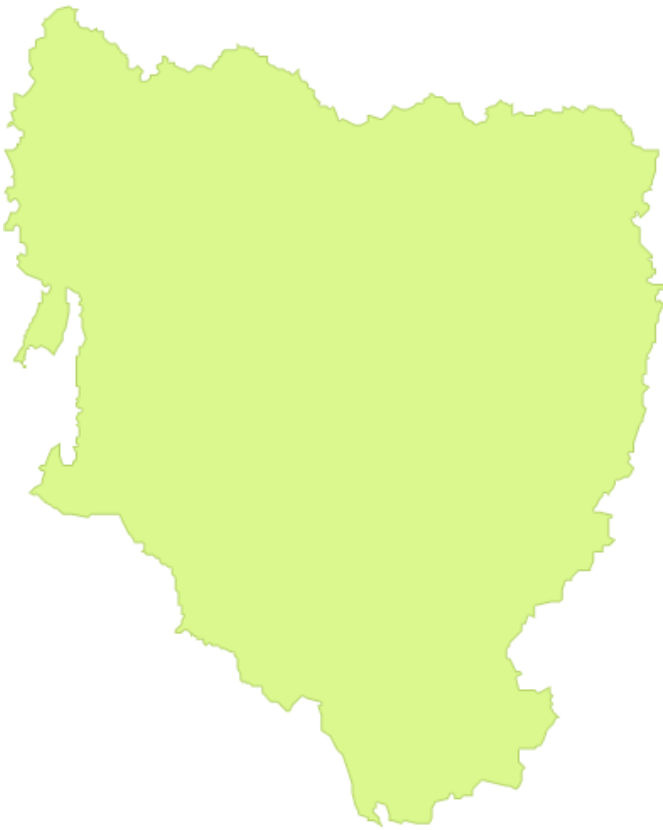
Adopting good-practices already in place in other Asian countries:

Catalogue online +6 points

Import permit 12 months +3 points

Penalties mislabeled bags +5 points

Fertilizer score 67



# EBA 2016 Report

Indicator Data - Enabling t... x +

eba.worldbank.org/data/exploretopics/fertilizer

TOPICS

Research / EBA Home / Topic

## Enabling the Business of Agriculture

EBA Home

Data by Country >

Data by Indicator >

Methodology

Reports

About Us

**Fertilizer**

The *Enabling the Business of Agriculture* fertilizer indicators measure laws and regulations related to registration, import, and quality control of fertilizer products. They address factors important to importing and selling fertilizer products, farmers using quality fertilizer products to increase their yields, and governments pursuing regulations that ensure the quality of products and effectiveness of fertilizer.

Search records

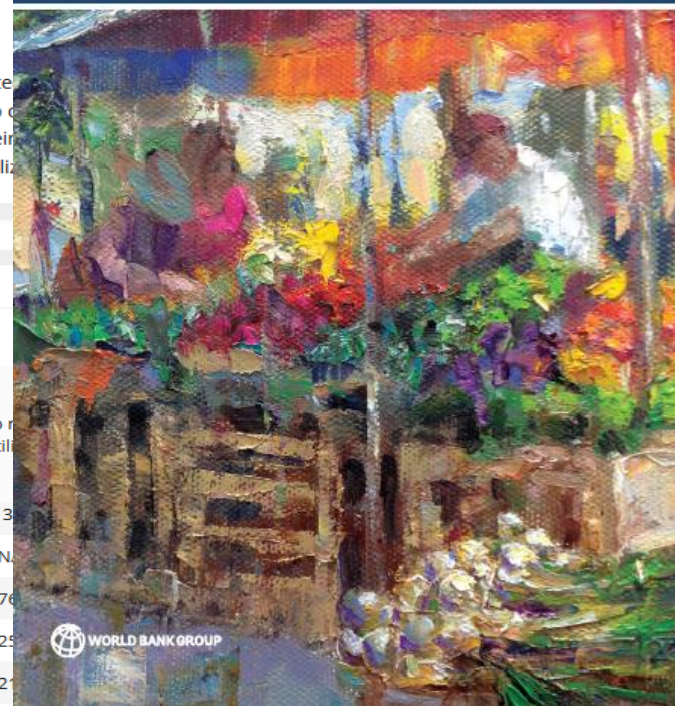
Showing 1 to 40 of 40 results

Show entries 40 ▾

Economy	Topic Score ▴ ▾	Fertilizer registration (0-100) ▴ ▾	Number of procedures to register a new fertilizer ▴ ▾	Time to register a new fertilizer (days) ▴ ▾
<a href="#">Denmark</a>	82.2	80	2	3
<a href="#">Ethiopia</a>	34.4	20	N/A	N/A
<a href="#">Georgia</a>	68.9	90	5	76
			4	25
			7	21
			2	105
<a href="#">Jordan</a>	67.8	70	3	36
<a href="#">Kenya</a>	50.0	0	N/A	N/A
<a href="#">Kyrgyz Republic</a>	63.9	75	5	730
<a href="#">Lao PDR</a>	60.6	45	4	No data

## ENABLING THE BUSINESS OF AGRICULTURE 2016







COMPARING REGULATORY GOOD PRACTICES



eba.worldbank.org

# EBA 2016 Report

## Country scores

						
COUNTRY	SEEDS	FERTILIZER	MACHINERY	FINANCE	MARKETS	TRANSPORT
BANGLADESH	●	●	●	●	●	●
BOLIVIA	●	●	●	●	●	●
BOSNIA AND HERZEGOVINA	●	●	●	●	●	●
BURKINA FASO	●	●	●	●	●	●
BURUNDI	●	●	●	●	●	●
CAMBODIA	●	●	●	●	●	●
CHILE	●	●	●	N/A	●	●
COLOMBIA	●	●	●	●	●	●
CÔTE D'IVOIRE	●	●	●	●	●	●
DENMARK	●	●	●	N/A	●	●
ETHIOPIA	●	●	●	●	●	●
GEORGIA	●	●	●	●	●	●
GHANA	●	●	●	●	●	●
GREECE	●	●	●	N/A	●	●
GUATEMALA	●	●	●	●	●	●
JORDAN	●	●	●	●	●	●
KENYA	●	●	●	●	●	●
KYRGYZ REPUBLIC	●	●	●	●	●	●
LAO PDR	●	●	●	●	●	●
MALI	●	●	●	●	●	●
MOROCCO	●	●	●	●	●	●
MOZAMBIQUE	●	●	●	●	●	●
MYANMAR	●	●	●	●	●	●
NEPAL	●	●	●	●	●	●
NICARAGUA	●	●	●	●	●	●
NIGER	●	●	●	●	●	●
PHILIPPINES	●	●	●	●	●	●
POLAND	●	●	●	N/A	●	●
RUSSIAN FEDERATION	●	●	●	N/A	●	●
RWANDA	●	●	●	●	●	●
SPAIN	●	●	●	N/A	●	●
SRI LANKA	●	●	●	●	●	●
SUDAN	●	●	●	●	●	●
TAJIKISTAN	●	●	●	●	●	●
TANZANIA	●	●	●	●	●	●
TURKEY	●	●	●	●	●	●
UGANDA	●	●	●	●	●	●
UKRAINE	●	●	●	●	●	●
VIETNAM	●	●	●	●	●	●
ZAMBIA	●	●	●	●	●	●

Topic score > 85

Topic score > EBA average

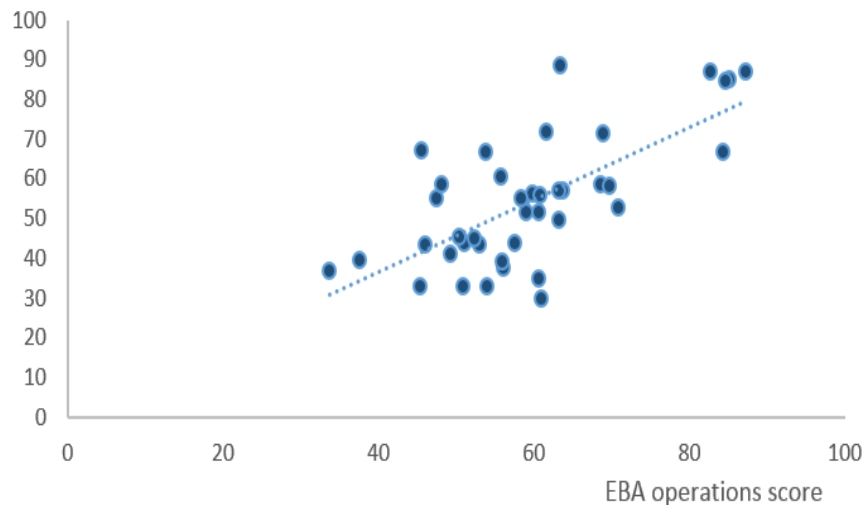
Topic score < EBA average

Topic score < 30

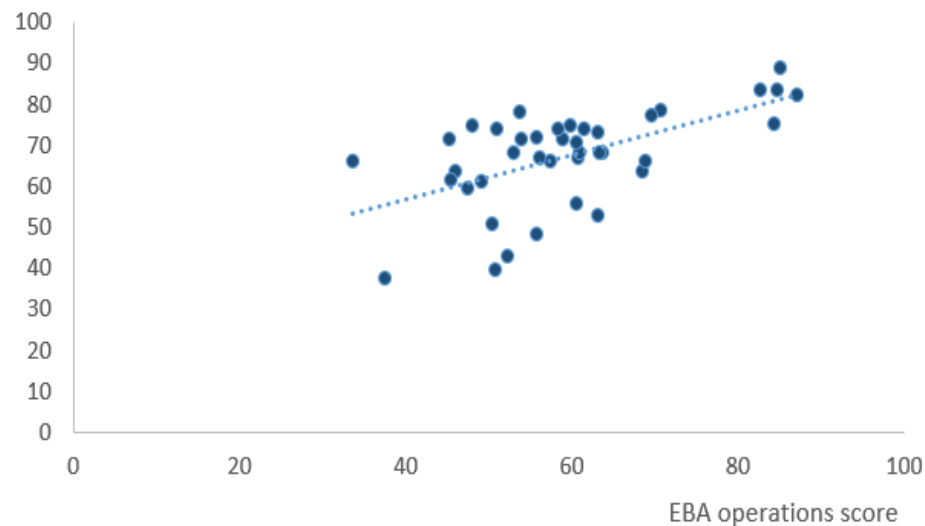
# EBA 2016 Report

## Complementary strengths

EBA quality control score

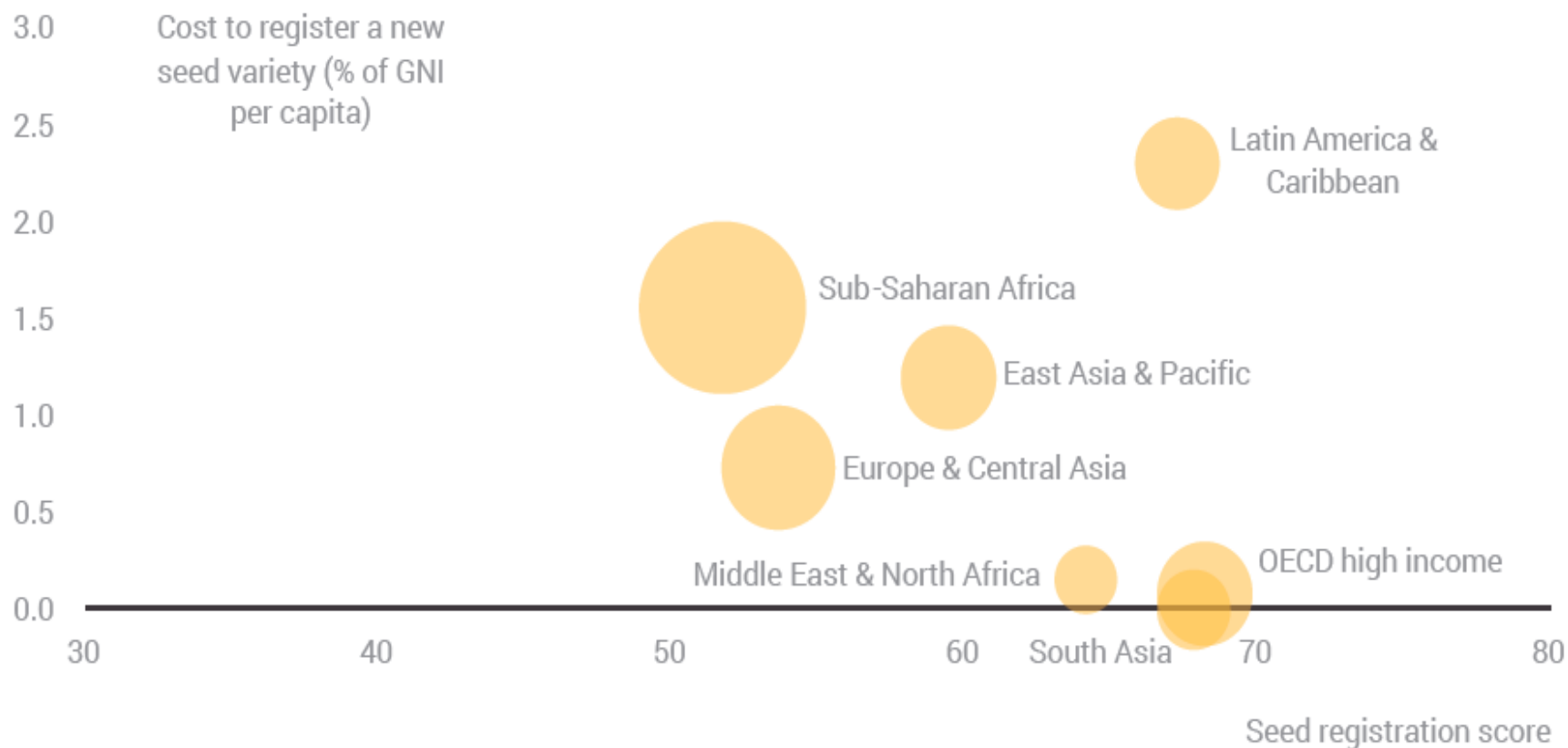


EBA trade score



Countries with smarter regulations on operations  
also promote quality control and trade

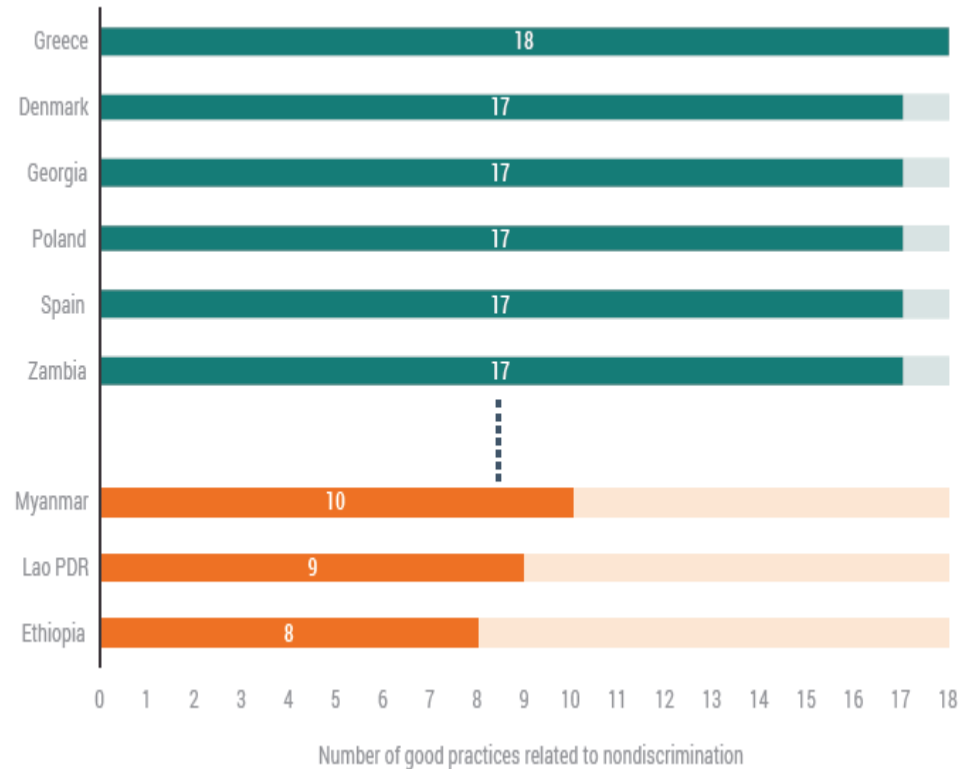




Regions with similar rules show different costs for registering a new seed variety

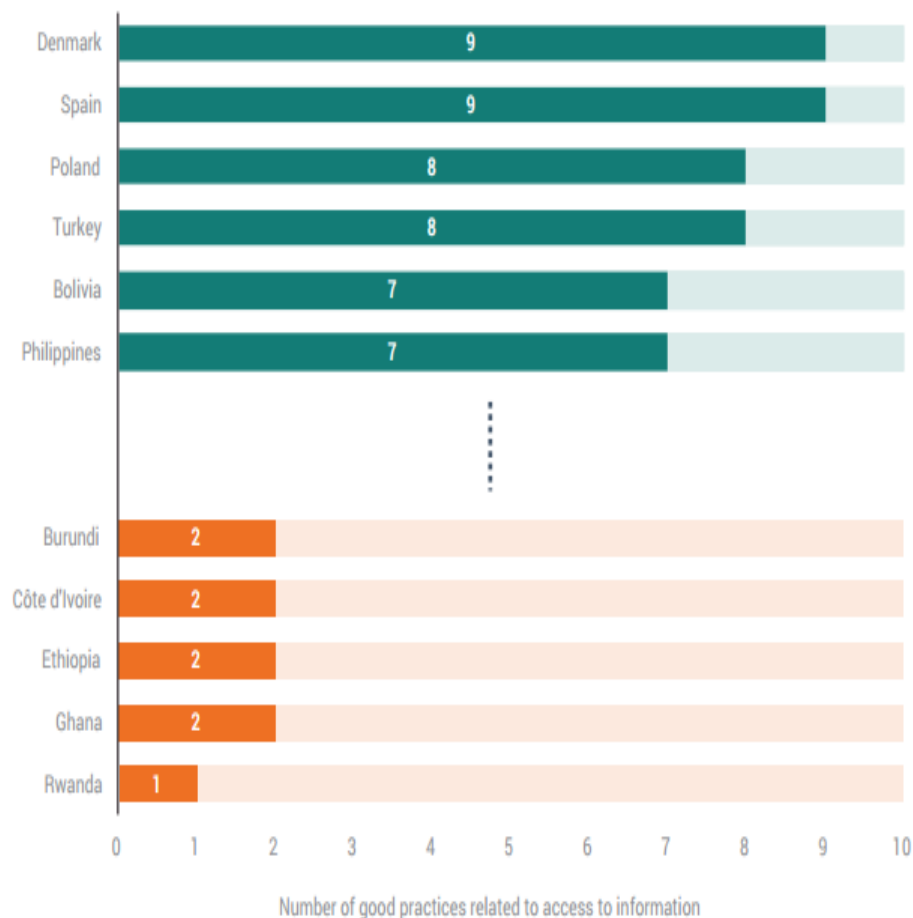
# Measures of regulatory discrimination

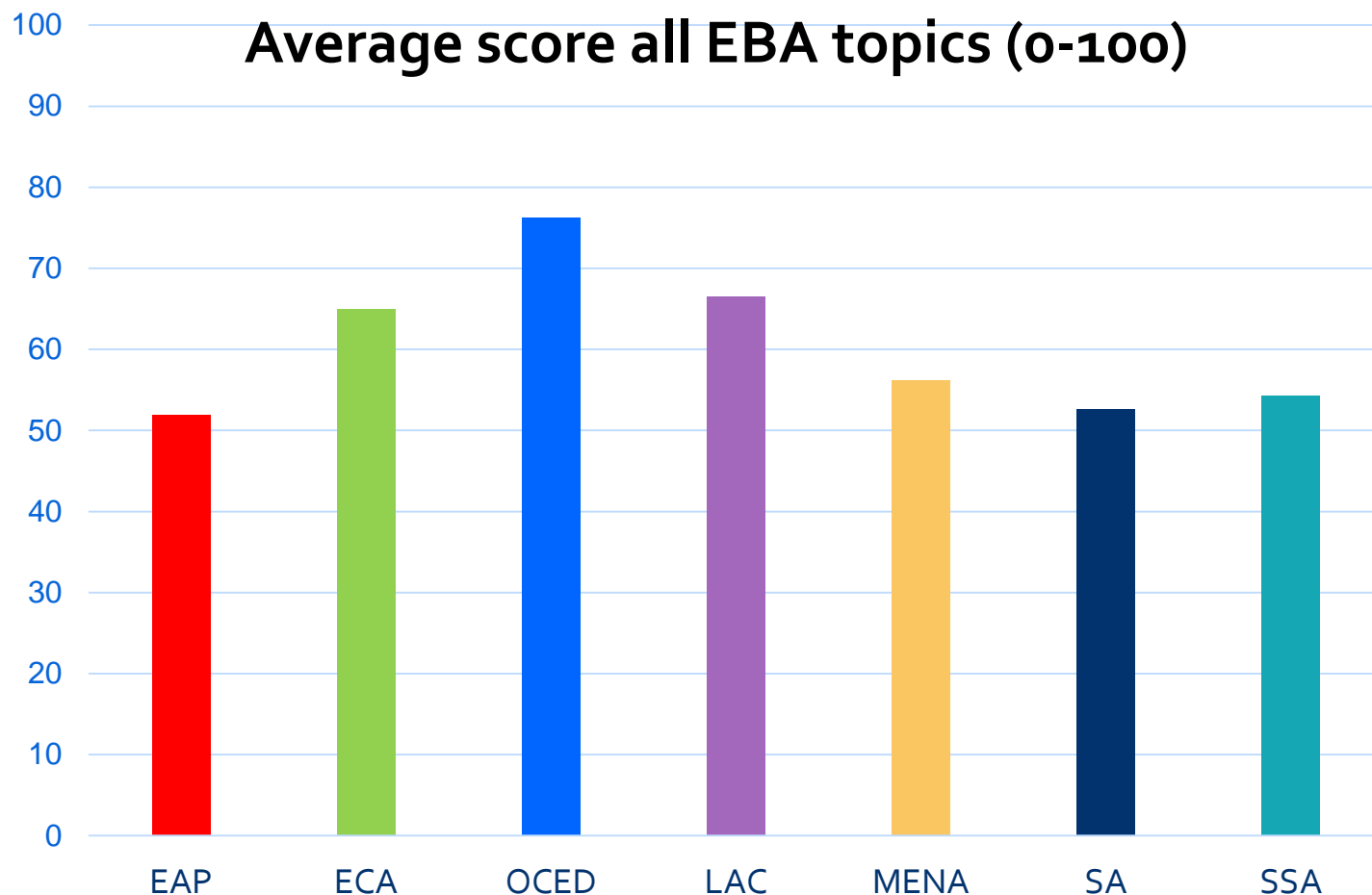
- Greece, Denmark, Poland, Spain and Zambia have the highest number of non-discriminatory regulations in place
- Ethiopia, the Lao People's Democratic Republic and Myanmar have the fewest.
- Only a third of countries allow the private sector to carry out the seed certification process.
- While 38 countries allow foreign companies to transport goods into their country from outside, only 4 allow them to transport goods between two locations within the country.



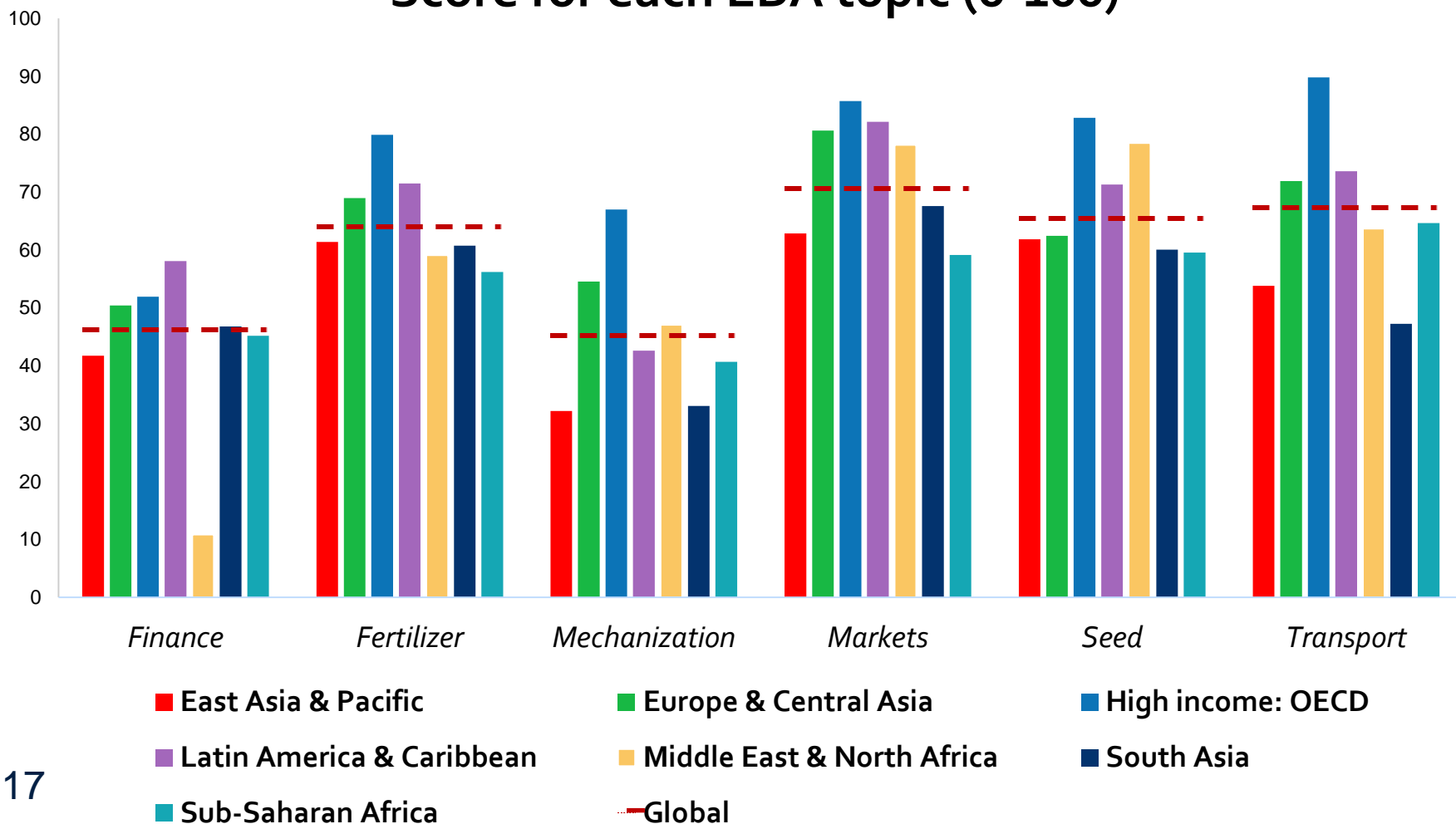
# Measures of accessibility of the information

- EBA measures whether Governments make regulatory information available to the public (e.g. licensing requirements, fee schedules, official catalogs).
- Denmark and Spain have the highest number of good practices and Rwanda has the fewest.
- While 75% of the countries have official catalogs listing new registered seeds or fertilizer products, fewer than half make them available online.

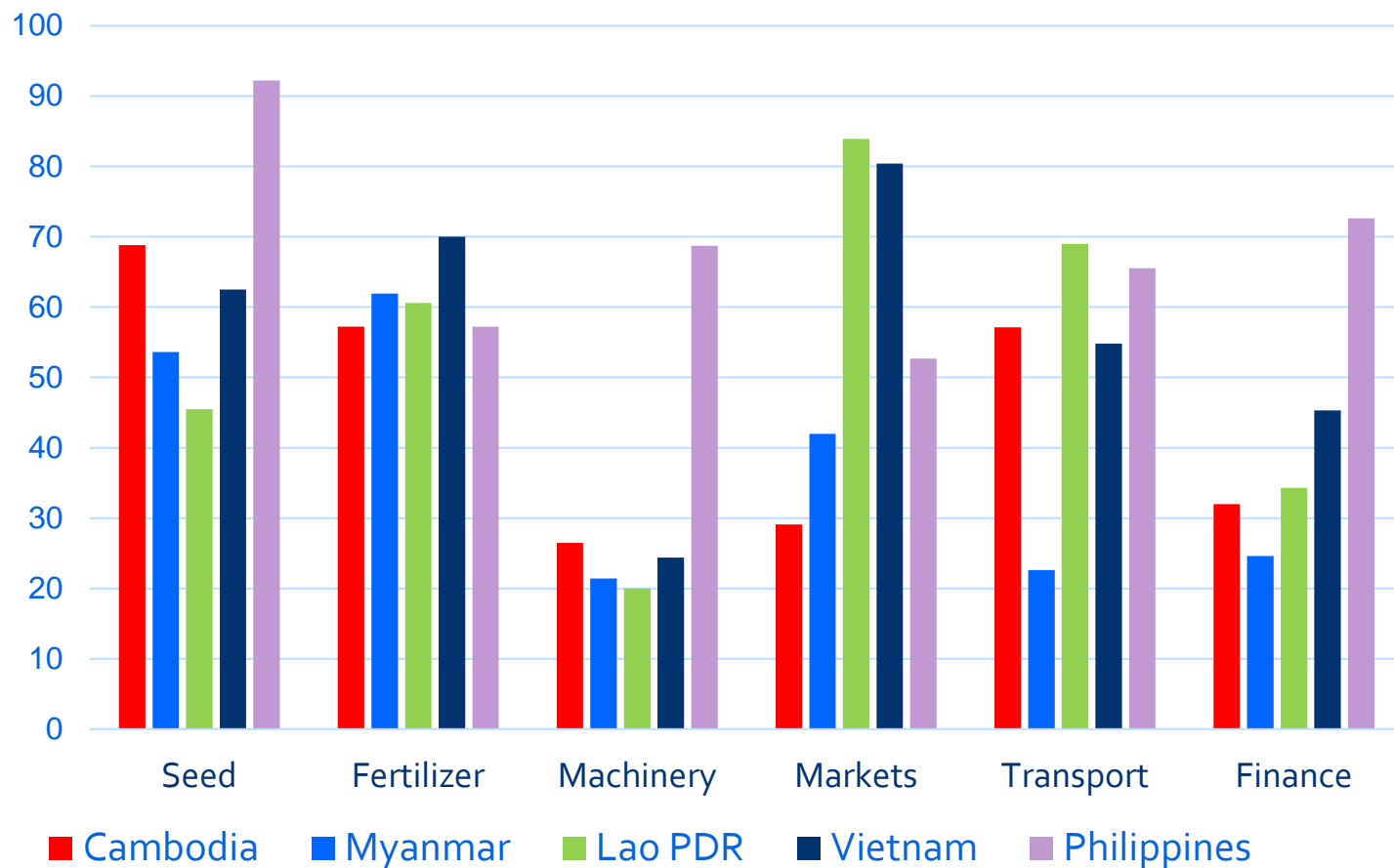




Score for each EBA topic (0-100)

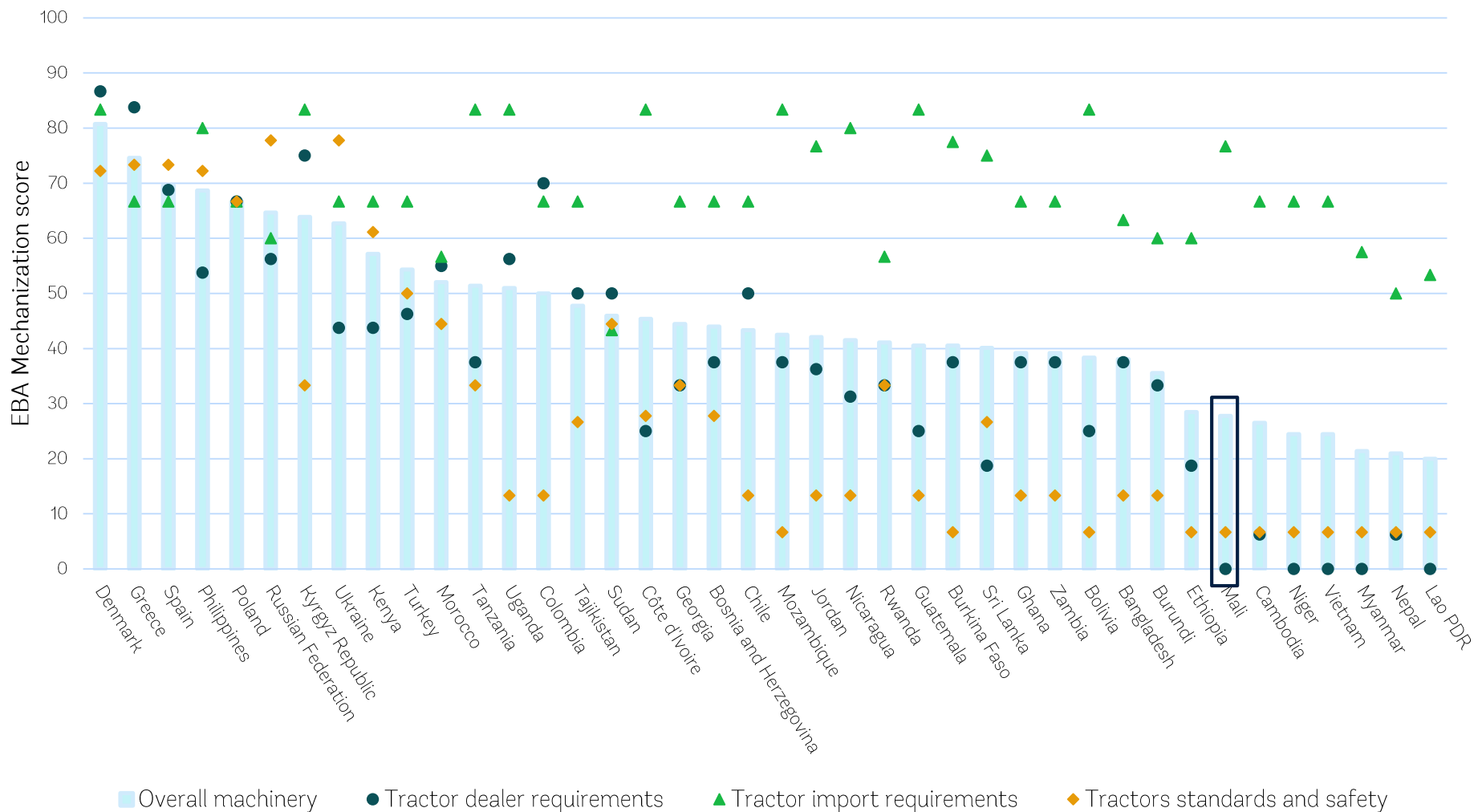


Topic scores



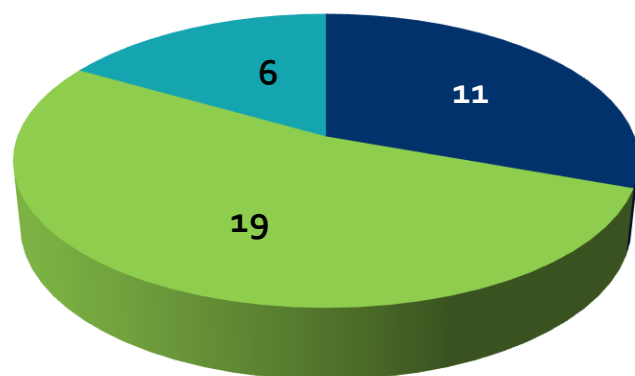
# EBA 2016 Report

## Machinery



### Variety release process

Importance of private sector representation and frequency of meetings

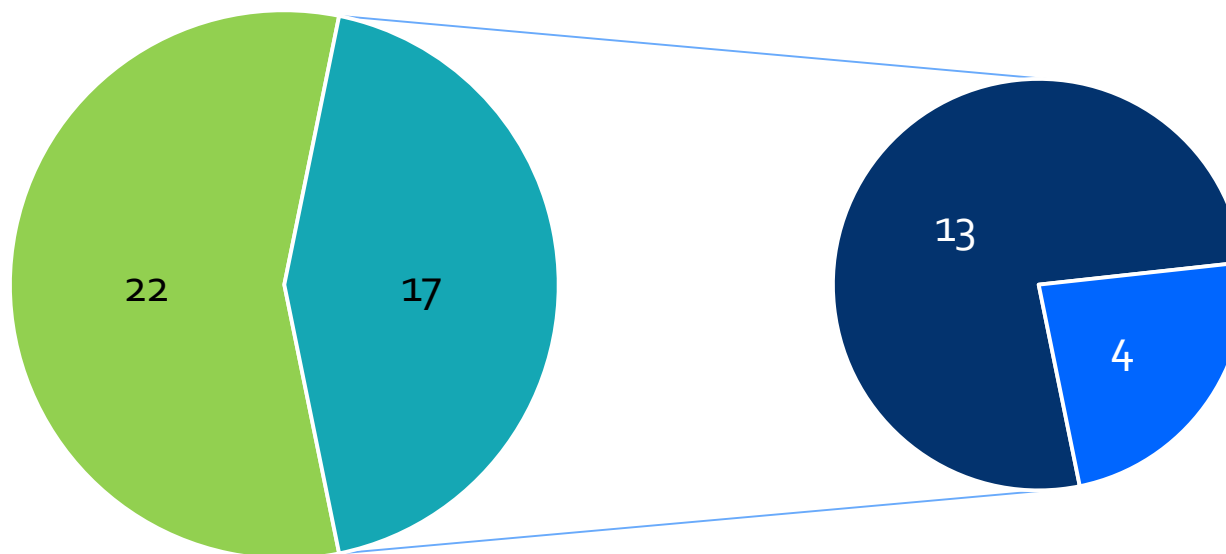


■ No private sector  
■ Less than half private sector  
■ Half or more private sector

VRCommittee		Countries
Meets on demand	7	Bangladesh, Bolivia, Colombia, Côte d'Ivoire, Kenya, Lao PDR, Nepal
Meets after each cropping season	22	Chile, Denmark, Ethiopia, Greece, Jordan, Kyrgyz Republic, Mozambique, Myanmar, Nicaragua, Philippines, Poland, the Russian Federation, Spain, Sri Lanka, Sudan, Tajikistan, Tanzania, Turkey, Uganda, Ukraine, Vietnam, Zambia
Doesn't meet after each crop season	1	Morocco
Established but does not meet	6	Burkina Faso, Burundi, Georgia, Ghana, Mali, Rwanda
Not established	4	Bosnia and Herzegovina, Cambodia, Guatemala, Niger



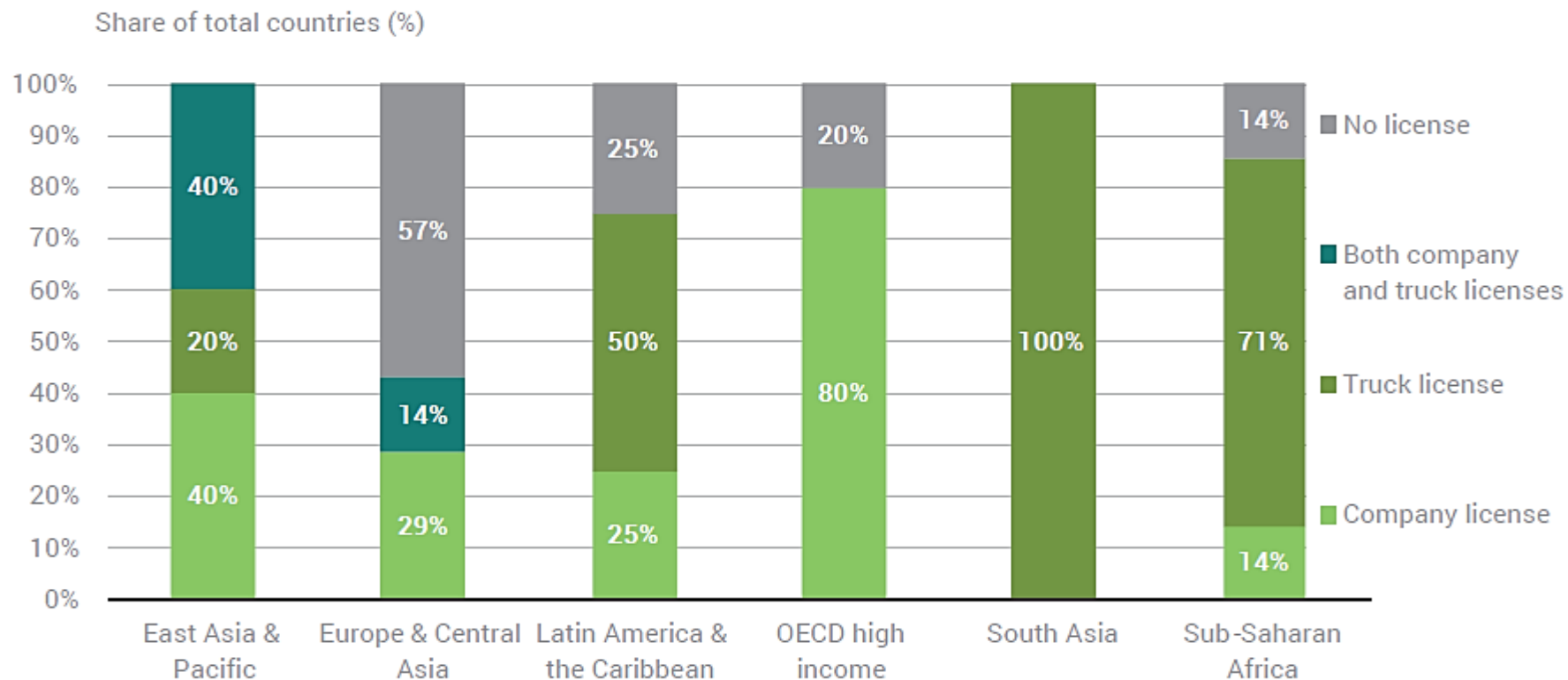
### Open fertilizer bags Most countries allow their sale



- Law prohibits the sale of opened fertilizer containers/bags
- Law does not prohibit the sale of opened fertilizer containers/bags
- Law establishes penalty for the sale of opened fertilizer containers/bags
- Law does not establish penalty for the sale of opened fertilizer containers/bags

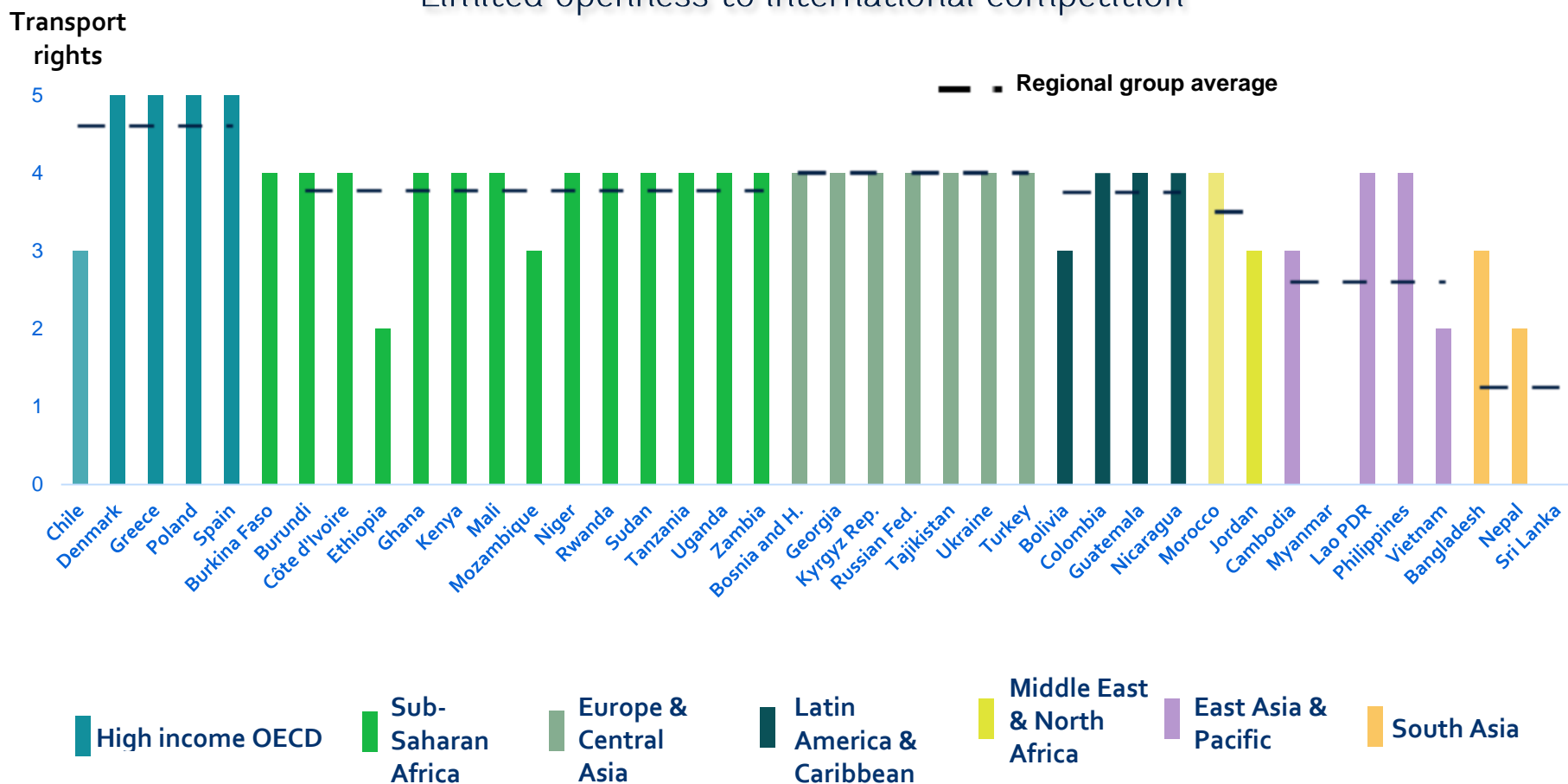
### Transport license systems

Company road transport licensing promotes better transport operations



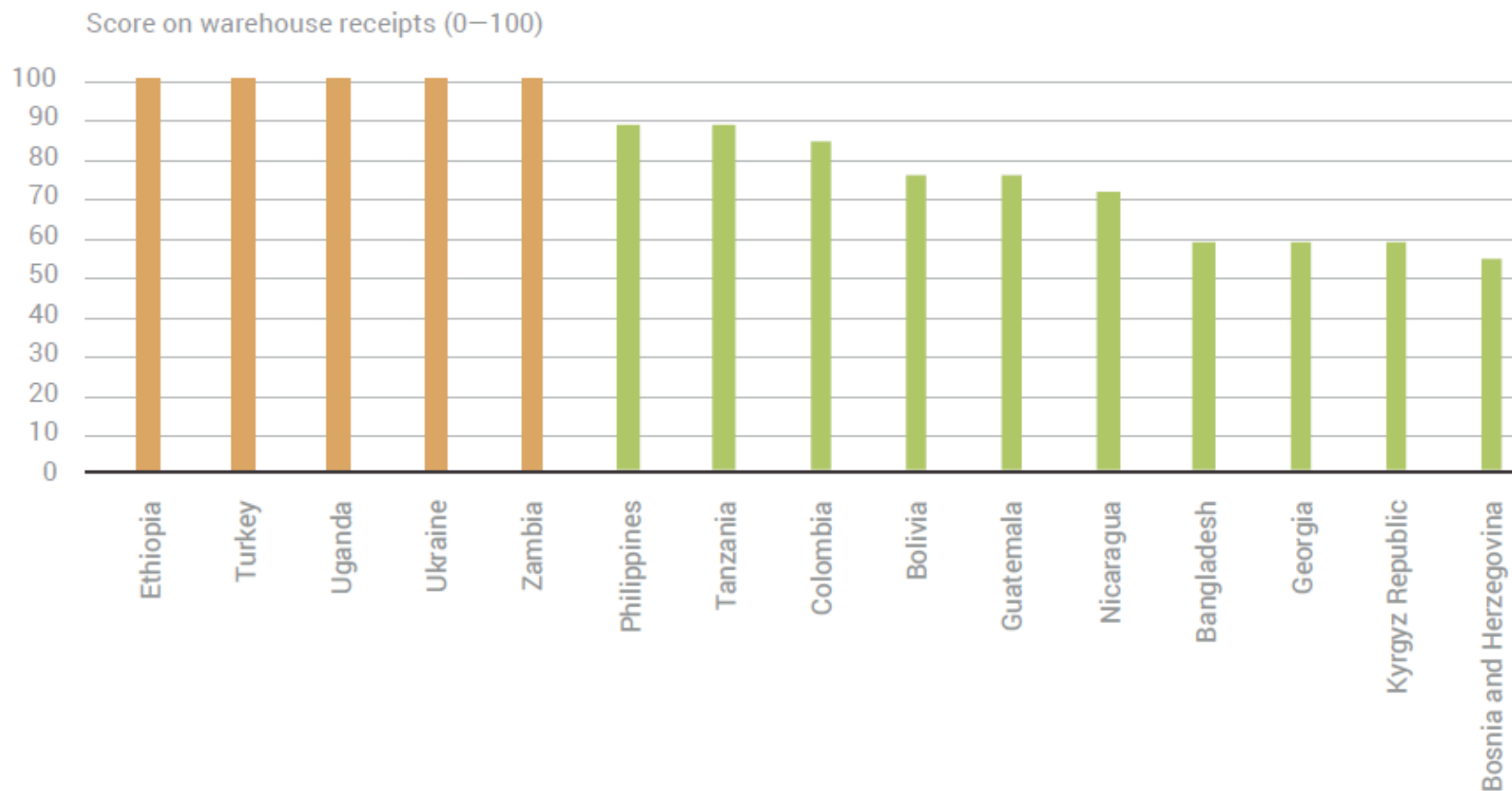
## Transport rights for foreign companies

Limited openness to international competition



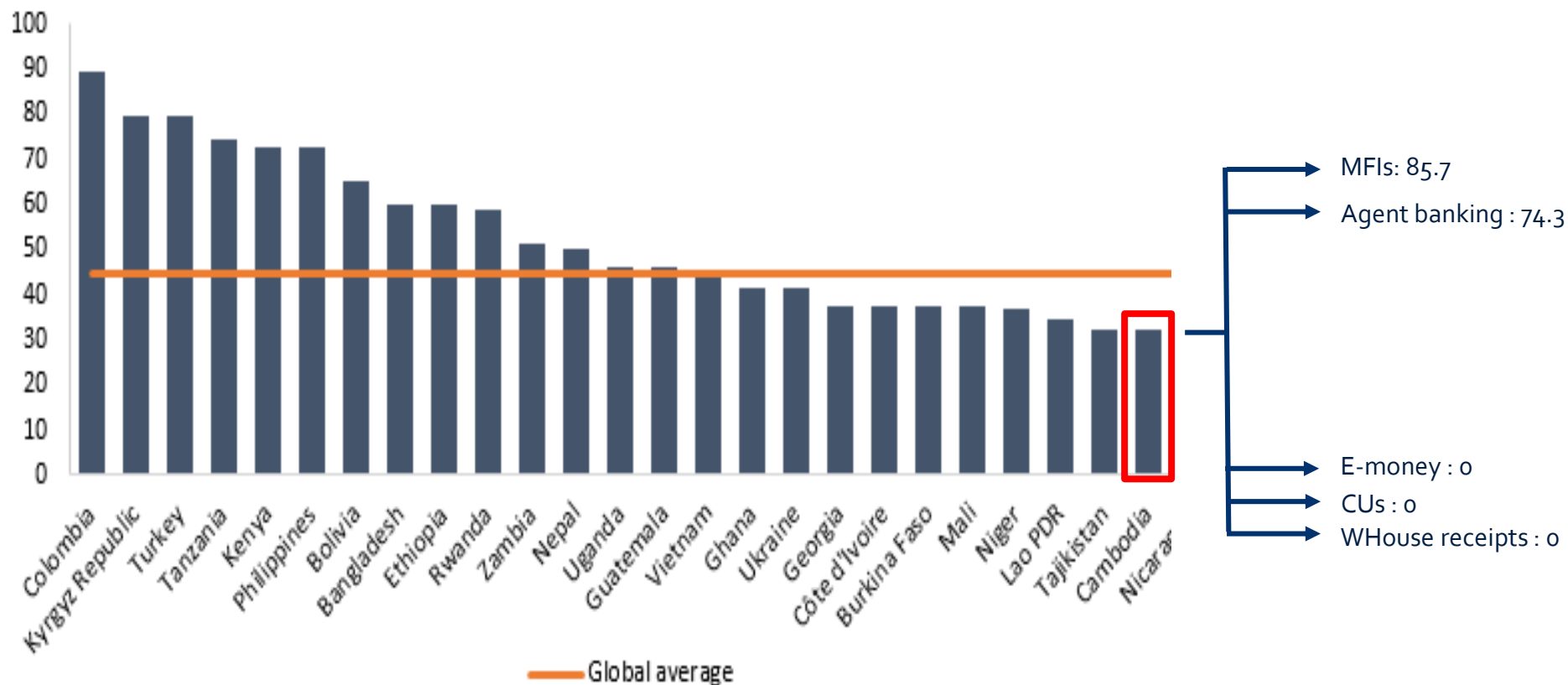
### Warehouse receipts

Few countries regulate warehouse receipts systems



# EBA 2016 Report

## Finance



### LOWER COST

**Russia** (free - *up to 5 registration a year*)

**Chile** (6%)

**Poland** (7%)

**Denmark** (8%)

**Greece** (9%)

**Spain** (10%)

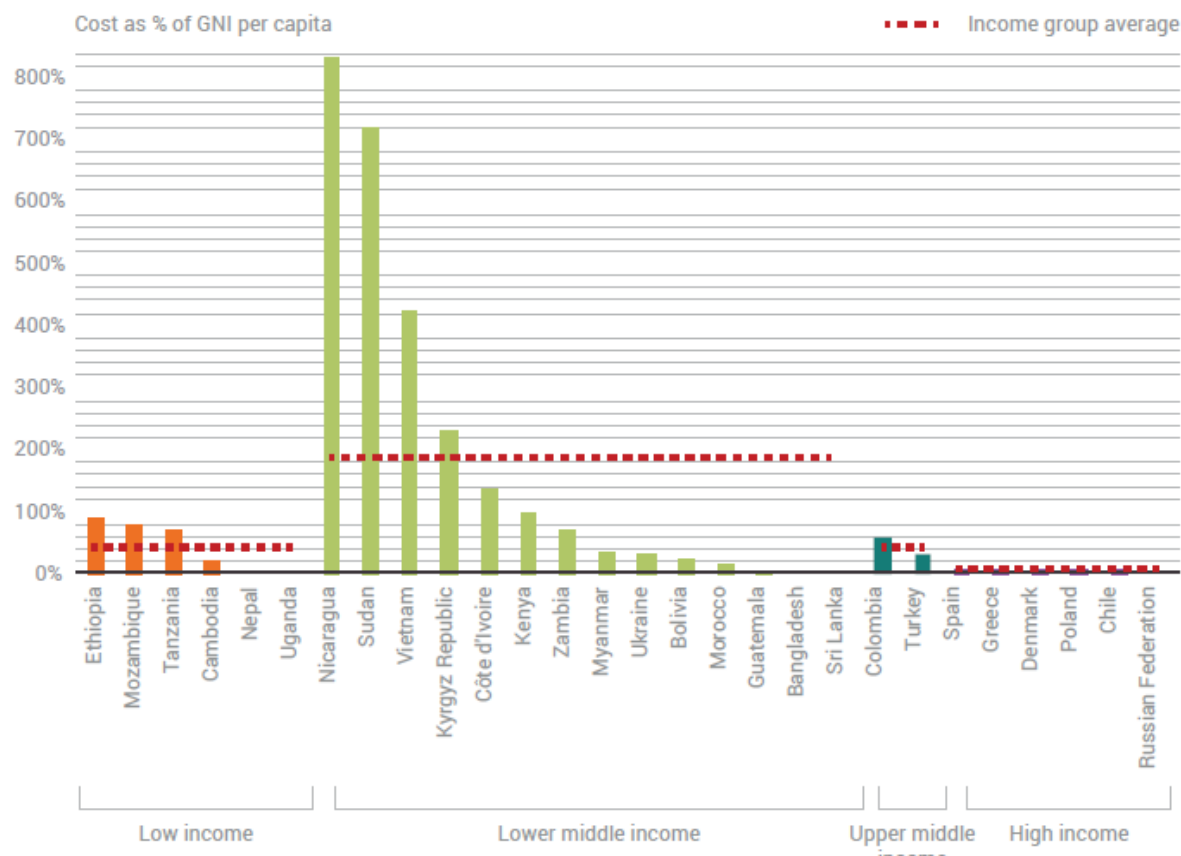
### HIGHER COST

**Nicaragua** (834%)

**Sudan** (722%)

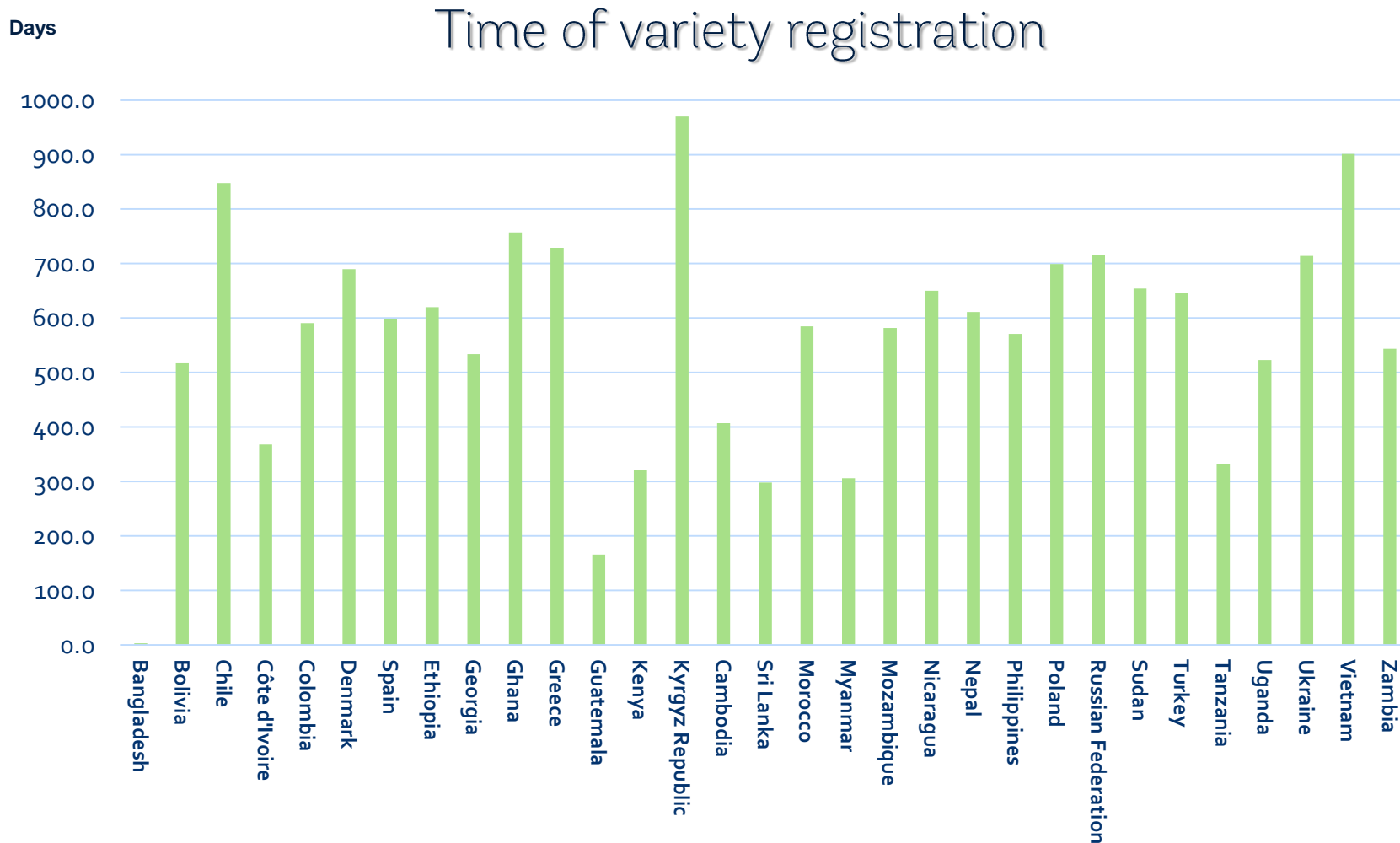
**Vietnam** (426%)

### Cost of variety registration



# EBA 2016 Report

Seed

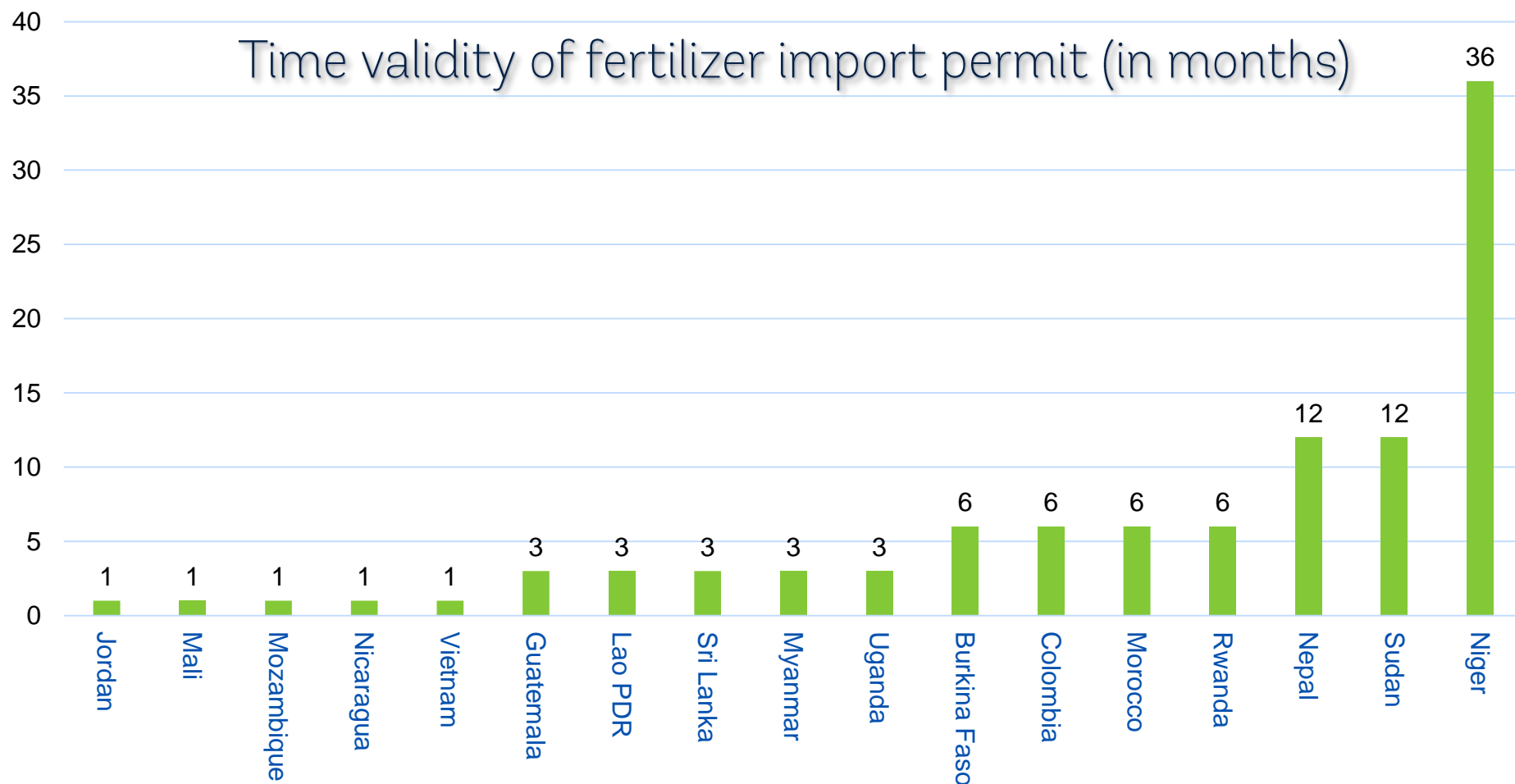


### Registration of a fertilizer product: time and cost

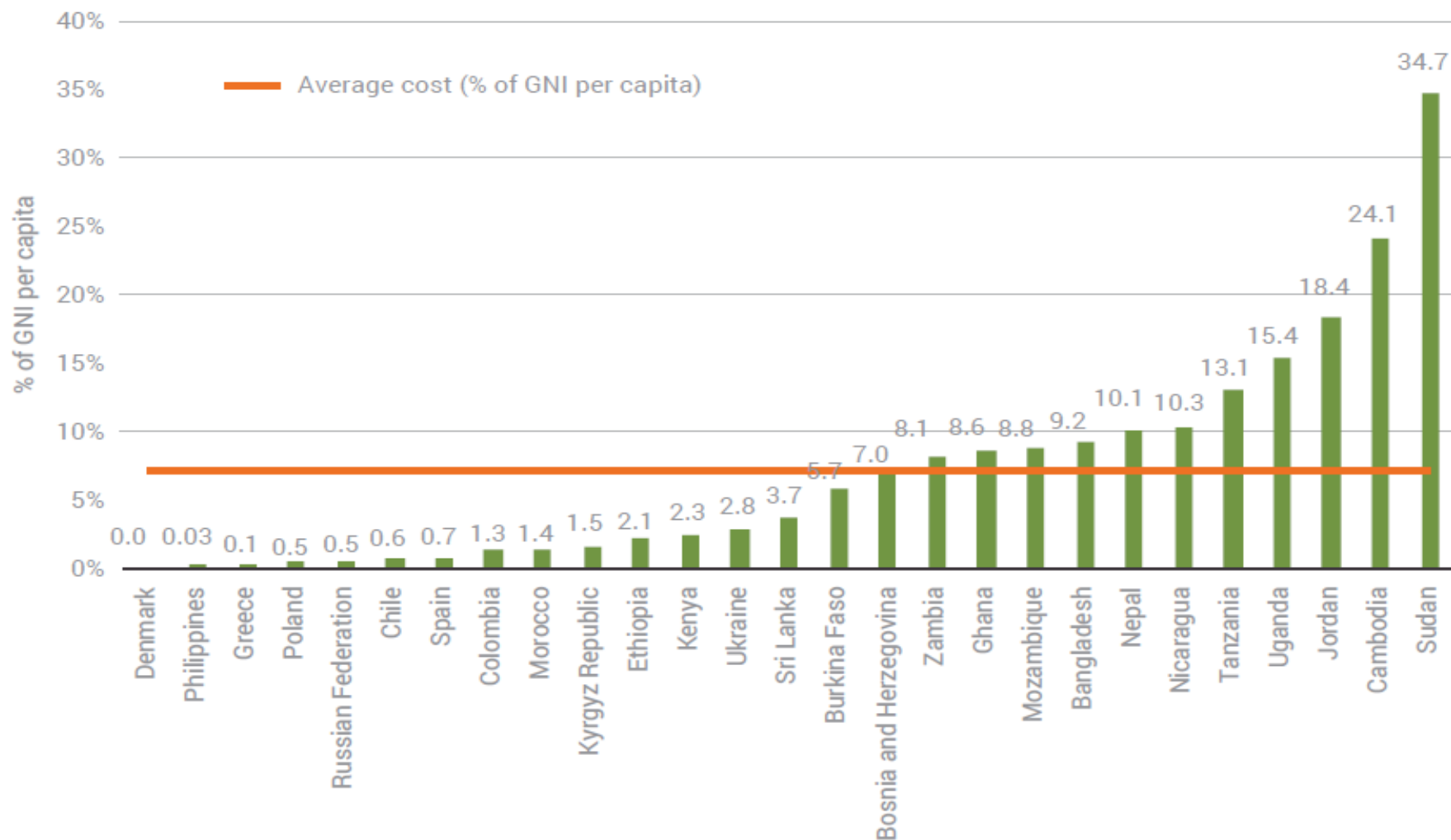
COST TO REGISTER A NEW FERTILIZER (% OF GNI PER CAPITA)				TIME TO REGISTER A NEW FERTILIZER (DAYS)			
The cheapest...		... and the most expensive		The fastest...		... and the slowest	
Spain	0.0%	Tanzania	1064.5%	Vietnam	15	Nepal	1125
Jordan	0.3%	Ukraine	717.3%	Sudan	29	Bangladesh	951
Guatemala	0.4%	Uganda	258.9%	Nicaragua	30	Georgia	765
Denmark	0.4%	Zambia	241.5%	Bosnia and Herzegovina	31	Kyrgyz Republic	730
Bosnia and Herzegovina	0.5%	Ghana	89.2%	Denmark	31	Uganda	691



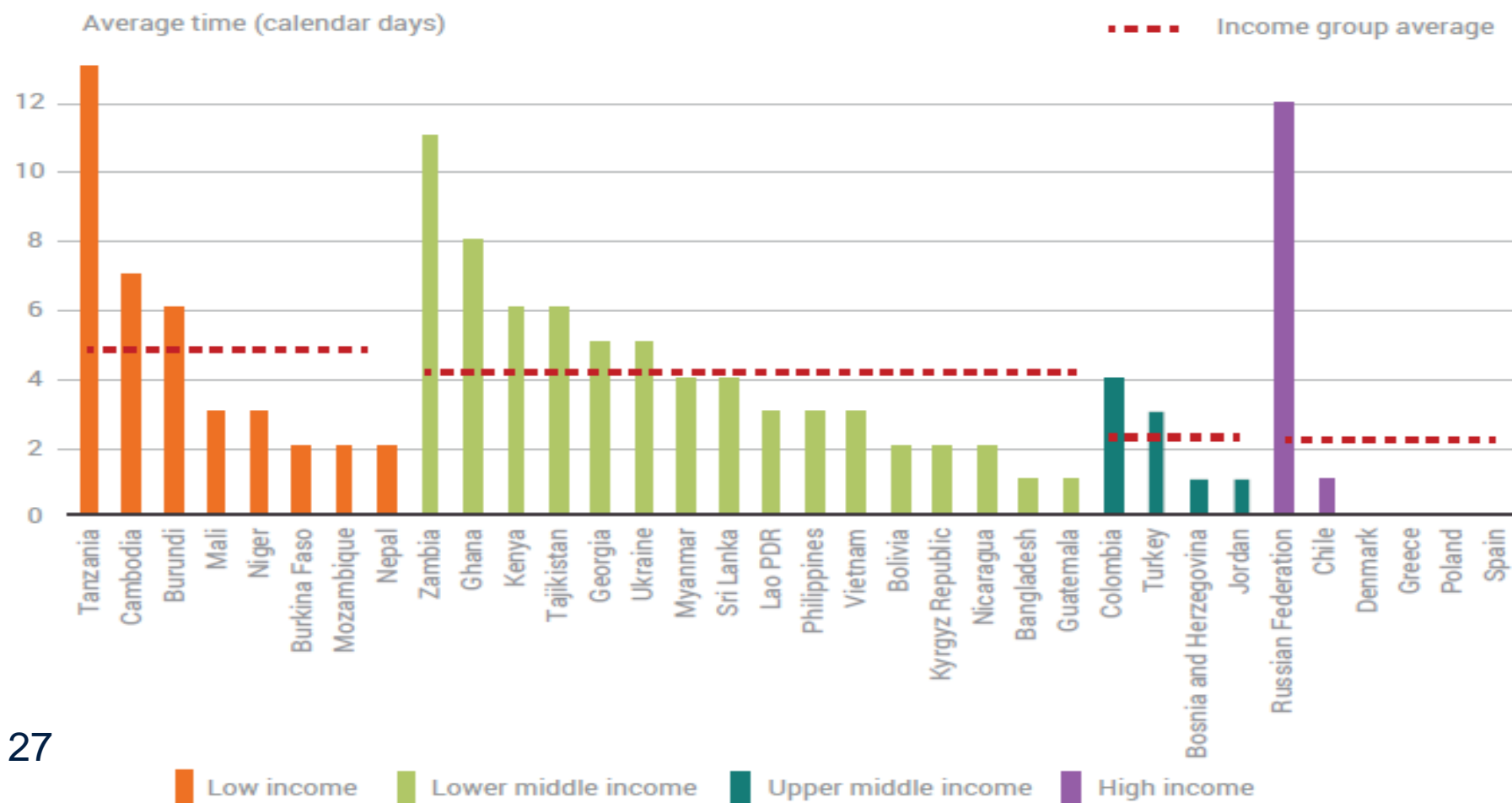
Months



### Cost to register imported tractors

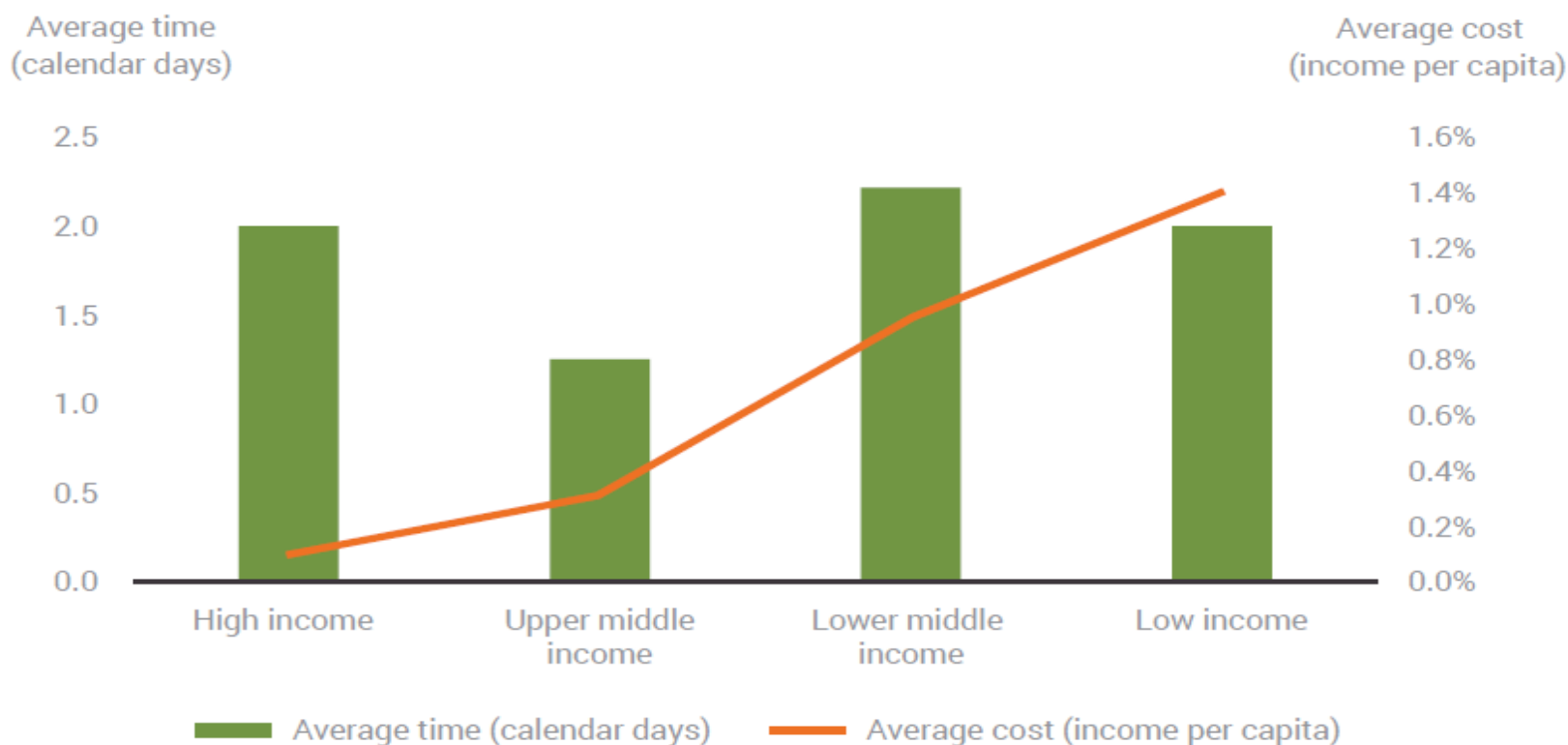


### Time to obtain per-shipment export documents



### Domestic plant protection frameworks

Strong frameworks correspond with low time and cost to obtain a phytosanitary certificate



### EFFECTIVENESS

Cost of  
conducting a  
survey

Freedom and  
security of  
contracting

### TRANSPARENCY

Procedural  
safeguards in case  
of expropriation

Relevance of land  
records

Public/state land  
management

### INCLUSION

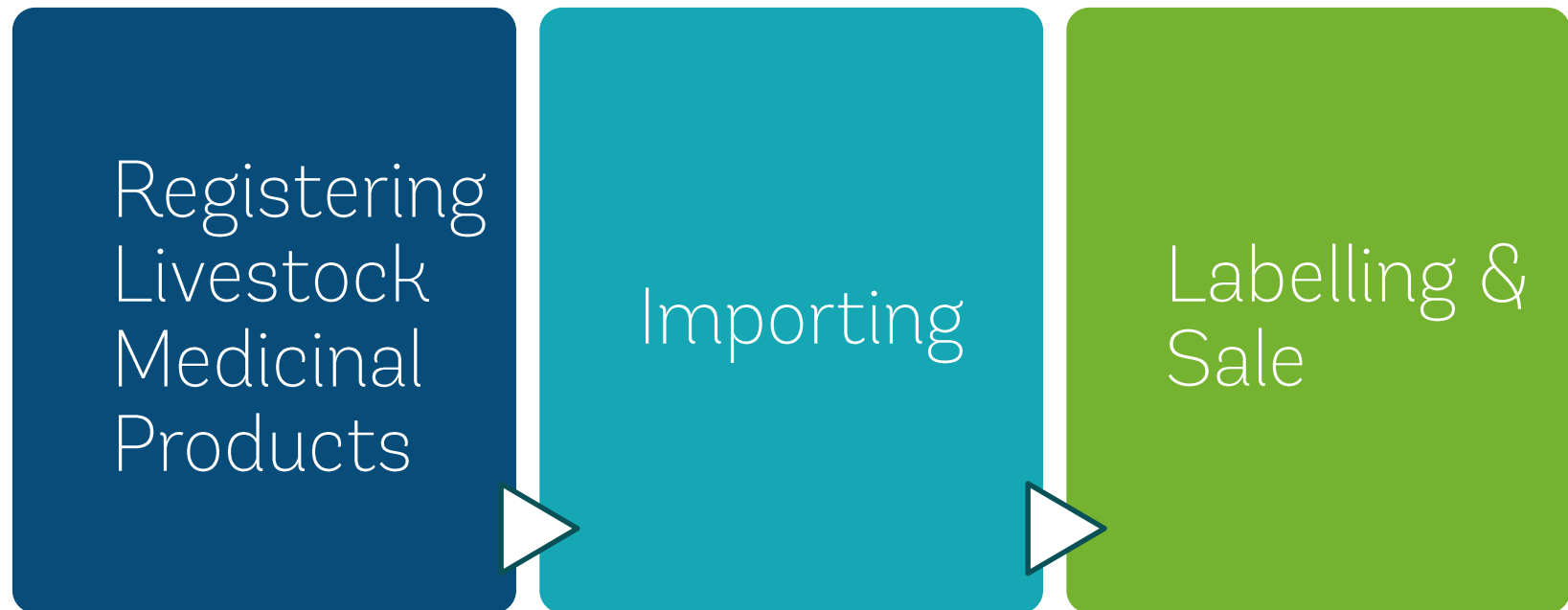
Registration of  
group rights

Gender  
disaggregation of  
land records

Water  
Abstraction  
and Use  
Permits

Water User  
Organizations  
(WUOs)

Water  
Resources  
Management



Diversity of  
Plant Genetic  
Resources

Sustainable  
water resources  
management



Water



Livestock



Fertilizer

[New in EBA17 Survey]

Soil health +  
Economic incentives for  
sustainable practices



Licensing  
regimes

Government  
strategies

[dropped in EBA2017]  
Agricultural  
e-extension  
services

Collect new data on constraints faced by women across the EBA topic areas:



Availability of sex-disaggregated data



Restrictions on women's employment and activity



Women's participation and leadership in collective groups



Government and private sector initiatives to include and empower women

# ENABLING THE BUSINESS OF AGRICULTURE

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<http://eba.worldbank.org/>



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Questions?