A Consultation Workshop on Comparative Rice Competitiveness: Lessons Learnt on Successful Development of Rice Value Chains in Asia for West Africa

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Report produced by

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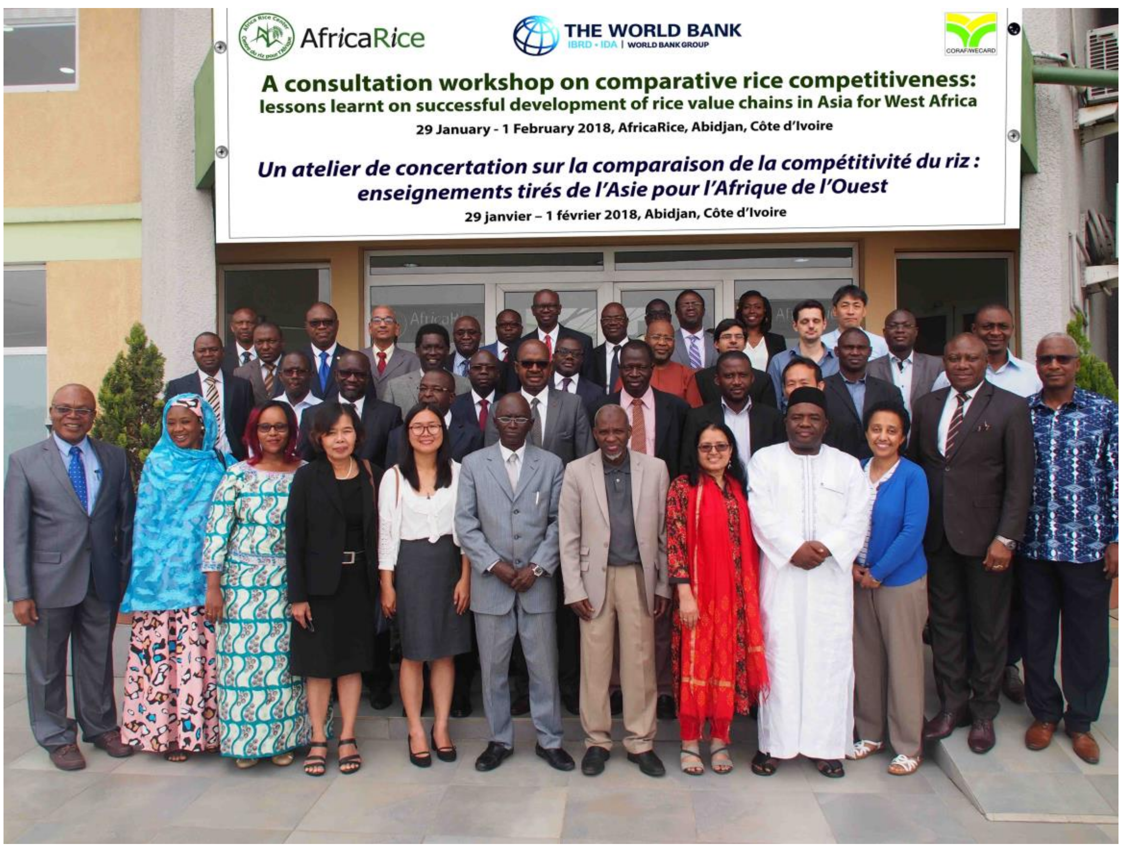

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Executive Summary

1. **Introduction:** A consultation workshop titled "Comparative rice competitiveness: lessons leant on successful development of rice value chains in Asia for West Africa" was organized from January 29th to February 1st, 2018, at the AfricaRice Office in Abidjan, Côte d'Ivoire. The aim was to learn lessons on successful development of rice value chains in Asia and draw experience from Asia for the development of on rice value chain in West Africa. The workshop brought together 59 participants from 14 countries who are directly involved in the rice sector. They included government and development partners' representatives, research scientists, private sector operators (millers and distributors) and producers from Asia and Africa. The participants discussed and shared experiences on rice value chain in three (3) Asian countries (Cambodia, India, and Thailand) and in five (5) West African countries (Côte d'Ivoire, Ghana, Mali, Nigeria and Senegal). Discussions from the former group covered the whole value chain and success factors which West African countries could adapt to their context, whereas those from the latter group of countries focused on the role of rice value chains in national rice development strategies. Evidence-based approaches to accelerating rice self-sufficiency, with a focus on predictions of additional investments needed in priority segments of the rice value chain and timelines for attaining self-sufficiency, and proposals for institutionalizing the process were presented by AfricaRice and the AGRA[2]. In small working groups, participants critically examined issues and made recommendation on consumers' preferences and traders' perspectives in driving the rice value chain and boosting production, production ecosystems and zoning, scale in production, aggregation, processing, quality in quantity, marketing, role of public investment, risks and their mitigation for the financiers, employment, policy tools, and regional synergies.
2. **Outputs:** The **workshop** outputs could be summarized as follows:
   i. Increased knowledge on the drivers of performance of upstream, midstream and downstream components of the rice value chain in Asia, and identified drivers, which could potentially contribute to improving the performance of the rice value chain in West Africa as well as similarities and dissimilarities between African and Asian rice sectors.
   ii. Increased knowledge on the strengths and weaknesses of the rice value chain as well as main constraints to achieving the objectives of the national rice development strategies (NRDS) of West African countries.
   iii. Increased knowledge on priority areas and estimates of additional investments required in the rice development sector to accelerate the attainment of rice self-sufficiency in the vanguard five West African countries (Côte d'Ivoire, Ghana, Mali, Nigeria and Senegal). Further, knowledge on evidence-based estimations of timelines for attaining rice self-sufficiency, which should aid policy decisions was also improved.
   iv. Identified or formulated national and regional policy options that would guide investment decisions by both public and private sectors.
3. **Recommendations:** The following key recommendations and lessons were derived from the workshop:
   i. ***Data***: Need to keep up the momentum in the ongoing work on credible data collection and analyses to guide investments in the rice value chain. National data triangulation could help to refine the analyses and hence improve the current projections

[2] Alliance for a Green Revolution in Africa

ii. ***Continental Plan for Accelerating Rice Self-sufficiency in Africa (CIPRiSSA[3])***:. Refine and propose multiple scenarios – considering production potential in different agro-ecological zones, production systems with respect to impact of climate change – for the implementation of CIPRiSSA. investment options and timelines for attaining rice self-sufficiency with realistic financial estimates of the profitability of these investments.

iii. ***Synergy creation between various rice value chain initiatives***: It is imperative to align the various initiatives on rice value chain enhancement in each country with the national rice development strategy (NRDS[4]) so to create synergy and hence better coordinate the efforts and maximize returns on investment. This could be achieved through the establishment of the Support System for Accelerating Rice Self-Sufficiency in Africa (SSARSSA[5]), being proposed by AfricaRice.

iv. ***Production***: The establishment of farmers' groups in various agro-ecological zones where farmers could grow fewer, targeted and adapted rice varieties (1 to 2) as opposed to the several varieties would improve paddy purity and enhance milling quality of locally produced rice

v. ***Processing***: the establishment of small to medium millers close to production sites, and the upgrading of existing rice mill machinery, with destoners, polishers, and graders, as well as the creation of paddy aggregation centers would greatly help to improve the quality of local milled rice.

vi. ***Marketing and Distribution***: Stakeholders should conduct marketing studies to identify the rice varieties, quality (characteristics) and size of the market demand which will drive other activities of the value chain. In addition, incentives should be created to capture lucrative urban, regional and international rice markets. These incentives include but are not limited to proper grading and sorting of rice and the development of attractive packages and labels for locally produced rice and putting in place local rice promotion programs.

vii. ***Policy***: Governments should pursue their support to the continued development of the rice value chain with a focus on developing and implementing adequate public policies, while providing improved basic infrastructure, such as storage facilities, market infrastructure, access to roads, power supply, and irrigation facilities.

viii. ***Marketing strategy***: The classification and branding of quality milled rice in West Africa, aimed at targeting different markets with different price structures, should be encouraged. Cross border paddy trade that could enable countries in the region which are in short-supply of paddy but well-equipped for milling to process rice and add value for their markets should be examined in considering comparative advantages. Producers and processors should be encouraged to build strong partnerships to consistently supply paddy and hence avoid side selling.

4. **Distilling lessons learned from Africa and from Asia** – The participants were divided into 4 working groups. Each working group included at least a participant from Asia, private operators from Africa and a mix of Focal Persons/Rice Desk Officers from the West African countries. The groups discussed and teased-out lessons on the following: productivity, production, quality issues, aggregation, processing, rice trade, regional synergies, design of supply chain, policy tools, public investments, risk mitigation, and job creation.

[3] Continental Investment Plan for accelerating Rice Self-Sufficiency in Africa, by Africa Rice Center, Côte d'Ivoire.
[4] A national rice development strategy was developed for each Africa country after the 2008 food crises.
[5]Support System for Accelerating Rice Self-Sufficiency proposed by AfricaRice

i. Create and sustain a viable seed system: Encourage private sector operators to invest in seed production. They may want to finance contract with farmers-based organizations to produce seeds of a specific rice variety. Farmers should also be encouraged to regularly renew their seed stock.
ii. Zoning of production sites: Each zone should select one or two suitable varieties depending on its targeted agro-ecologies to concentrate production. This will increase homogeneity of grains and facilitate the production for niche markets. Precision farming is also needed for niche markets.
iii. Climate change: This is affecting the cycle and zones of rice production. Climate smart technologies, including conservation agriculture need to be developed, disseminated and scaled up at a large scale
iv. Access to working capital: This is a central issue that limits the purchase of paddy from producers – innovative credit facilities are needed to facilitate this.
v. Rice of Premium Quality: To ensure a better quality of the end produce, actors of the value chain should endeavor to keep seed purity on the farm and paddy homogeneity during the aggregation and processing stages. Also, most appropriate processing techniques should be used in milling, including paddy cleaning, removal of impurities (chaff and stones), destoning, polishing, and grading to increase the quality of local milled rice and promote its consumption. Considering consumers' preferences (e.g., swelling capacity, taste, aroma, grain shape, etc.,) during rice breeding and processing would greatly enhance milled rice quality. Quality and safety need to be regularly controlled through independent surveys.
vi. Pricing of Local Rice: To encourage consumption of local rice against imported rice, competitive pricing needs to be encouraged through increased subsidies to segments of the value chain. Such subsidies should aim at reducing the production costs and transaction costs of the value chain – thus transcending the lower costs to the final consumer. West African governments and rice producers need to launch a grand and more vigorous campaign promoting the purchase and consumption of local rice. A further step to reduce the cost of local rice would be to reduce the number of intervening actors in the value chain. Reasons for the lower pricing of some imported rice are not clear – and should be studied especially because most consumers are price-sensitive, hence they purchase such imported rice at lower costs.
vii. Packaging and Branding: Improved packaging and branding should be a standard practice in the marketing of local rice – these enhance the presentation and value of the produce.
viii. Consistency of Appropriate Supply levels: Ensuring consistent availability of local rice throughout the year to increase its consumption– Ensure good quantification of the demand and supply balance.

Lobbying for international organizations to purchase local rice: International organizations such as World Food Program and relief organizations should be encouraged to source their supply locally from African countries rather than imports, especially when the locally produced rice meets the required quality standards.

5. **Public investments lessons** include the following:
i. Rehabilitate and expand irrigation and water management facilities – ensuring appropriate management of the irrigation schemes as well as efficient water management techniques;
ii. Provide weather information – fund climate resilient actions; and development of climate-smart varieties including resistance to flood, and drought/heat, salinity and iron toxicity, and early maturing.

iii. Develop proper seed production, purification, certification and distribution systems with rigorous and regular quality control.
iv. Storage infrastructure – including drying facilities;
v. Transportation infrastructure (roads) and other investment in rural infrastructure (e.g., market facilities);
vi. Promote use of rice-related technologies;
vii. Extension and advisory service should provide knowledge and skills to famers to build their capacity as professionals. In addition, regular demonstration coupled with training should be provided on how to use technologies to enhance productivity as this will encourage end-users adopt the technologies;
viii. Provision of credit facilities;
ix. Strengthen and upgrade the capacity of agro-dealers;
x. Strengthen farmers' organizations; improve the skills of the work force;
xi. Facilitate contractual arrangement between farmers, paddy collectors and millers –to ensure use of good quality seeds and farming practices while ensuring a market for the produce;
xii. Establishment of state-of-the-art rice milling facilities – on a public-private-partnerships basis. Develop clusters for common rice processing facilities;
xiii. Sensitization of traders, consumers on pertinence of quality;
xiv. Establish a unit of quality inspectors – which could be private or public from the national level to the lower level. Quality inspection could begin at the producers group levels also;
xv. Markets should drive rice production – identify the market demand and organize the rice value chain to meet that demand;
xvi. Establishment and consolidation of regional markets – which provide guarantees to producers.

6. **Policy interventions lessons**:

i. Establish policy that dedicates lowland areas as reserves for rice production – develop areas for rainfed rice;
ii. Facilitate access to land for both small and big investors in the rice sector;
iii. Regulate and strengthen the input delivery system – ensure access to quality inputs - certified seeds, fertilizer & agro-chemicals - at right time, at an affordable price and in all places, including remote areas;
iv. Develop and sustain a policy on easier access to credit, enhancing economies of scale, easy access to market information, and better capacity to benefit from technology for actors;
v. Ensure a viable seed policy;
vi. Develop a policy on farmers' seed replacement;
vii. Develop and sustain a comprehensive rice mechanization strategy;
viii. Formalize contracts for rice niche markets;
ix. Encourage farmers' groups to develop bankable business plans;
x. Encourage formal contracting between parties at all levels;
xi. Encourage crop insurance policies could assist farmers in mitigating the losses during disasters;
xii. Increase the capacity for upgrading of technologies used on farm - to benefit market access, and increase the capacity to access investment and operational funds;
xiii. Develop a policy that established and sustains trust between value chain partners – especially motivating private investment – and retain the work with the smallholder farmers;

xiv. Introduce policies that empower local producers to withstand competition from imports;
xv. Ensure a minimum guaranteed price for the different periods (pre-season, pre-harvest). Establish a public company to buy and maintain buffer stocks to contain price fluctuations;
xvi. Develop aggregation centers in major production areas to provide millers with good quality paddy but also regulate the aggregators through registration and monitoring;
xvii. Create an enabling environment for contractual arrangements between producers and millers;
xviii. Develop standard for mills – ensuring produce cleaning, polishing, destoning, color sorting, grading, etc.;
xix. Subsidize milling equipment – exempt their importation from taxes; reduce agricultural input costs (e.g., reduction of the electricity cost for agricultural pump irrigation);
xx. Establish and enforce quality standards - building capacity on quality standard;
xxi. Monitor incoming imported rice at the regional and country levels;
xxii. Introduce and sustain a massive public policy campaign to promote local rice and favor local procurement in public markets.
xxiii. Provide support to branding – this is a trigger to the private sector;
xxiv. Ensure the country's Chamber of commerce brings forward discussions on rice policy issues;
xxv. Strengthen policy on trade and a dynamic policy on Tariff to regulate imports;
xxvi. Implement a policy on good governance and transparency;
xxvii. Provide tax incentives to investors in the sector;
xxviii. Ensure all actors in the value chain leverage synergies in the rice value chain; implementation of ECOWAP[6] regional policies should be strengthened.

7. Next steps:

I. Produce a one pager on outcome of this workshop – Feb 1, 2018
II. Report of this Workshop - Feb 14, 2018
III. Policy brief (first draft) from the workshop report– Feb 21, 2018
IV. Country activities: in-country additional data collection by World Bank Consultant – Feb 2018
V. Final report of the Asian study led by World Bank:
    a. Circulation of draft report by World Bank Consultant – April 2018
    b. Final report end - May 2018
    c. Technical dissemination of report and workshop – end of May 2018
VI. Sustaining the momentum – Expanding and sustaining the CIPRiSSA studies to other countries by SSARSSA – from Feb 2018
VII. Plan for CIPRiSSA in Burkina Faso and Liberia (supported by World Bank/ WAATP[7]) – March 2018
VIII. Expanding WAATP to other countries
    a. WAATP approval – June/July

[6] ECOWAP is the acronym for the regional agricultural policy used in official languages across the Economic Community of West African States (ECOWAS).
[7] West Africa Agriculture Transformation Program

Introduction

8. The demand for rice in Africa is continuously growing with per capita rice consumption increasing at more than 3% annually in the last three decades. The continent's population growth rate estimated at about 2.9% annually by all indications increases the strain on demand for the rice grain. The rising urban populations also come with shifting preferences towards premium rice, and the need for enhanced competitiveness of locally produced rice on the African continent.
9. The hub of rice production in sub-Saharan Africa remains West Africa, which also has the highest per capita consumption of the grain on the continent (e.g. more than 100 kg/capita in Guinea and Sierra Leone). Nigeria is the largest producer, followed by Ghana, whereas per capita production is highest in Mali, Sierra Leone, and Guinea. The largest consumers on a per capita basis are Guinea, Guinea Bissau, Sierra Leone, Liberia, Mali, Senegal, Côte d'Ivoire, and the Gambia. Imports of milled rice into West Africa to fill the demand gap in 2016 amounted to about 8.3 million tons in 2015/2016 (United States Department of Agriculture[8]), with Asian countries, mainly Thailand, Vietnam, and India, being the major suppliers. This raises an imperative need to bridge the yawning gap between local production and imports and to accelerate the attainment of rice self-sufficiency for African countries in general, and West Africa, in specific. Such a need confirms and supports the concerns about rice consumption and imports, which have been at the center of food policy debates in West Africa for the past 20 years.
10. The World Bank facilitated West Africa Agricultural Transformation Program (WAATP) coordinated by CORAF/WECARD[9], and AfricaRice organized this workshop, which aimed at *sharing the Asian experience in the rice value chain development and its competitiveness with West Africa* countries (see workshop concept note in Annex 1). Although the workshop was initially planned to host 35 participants, 59 participants were recorded in the final attendance register. The participants included national Rice Desk Officers, who were formally nominated by the governments of five West African countries (Côte d'Ivoire, Ghana, Mali, Nigeria and Senegal); stakeholders of both public and private rice sector from Asia (Cambodia, India and Thailand); private sector operators in rice value chain; farmers; development partners: African Development Bank (AfDB), Alliance for a Green Revolution in Africa (AGRA), Food and Agricultural Organization (FAO), German Technical Cooperation (GIZ), International Fund for Agricultural Development (IFAD), Japan International Cooperation Agency (JICA) , and World Bank; regional organizations: CORAF/WECARD, Coalition for Africa Rice Development (CARD); and AfricaRice (see list of participants in Annex 2). Four (04) special guests from The Gambia also participated in the workshop, indicating Gambia's very strong desire to achieve rice self-sufficiency. Finally, the workshop attracted a wide range of media representatives, including: - Africa24, APA Tv, APA News, British Broadcasting Corporation (BBC), *Radio France International (RFI), Fraternité Matin, Radio Côte d'Ivoire, Radio la Paix* and *Radiodiffusion-Télévision Ivoirienne (RTI)*.

[8] Long term Outlook for Rice Production and Trade in West Africa: A Set of Productivity Growth Scenarios; by Nancy Cochrane, James Hansen, Getachew Nigatu, and Ralph Seeley: Retrieved from http://ageconsearch.umn.edu/bitstream/235692/2/AAEA%20Long%20term%20Outlook%20for%20Rice%20Production%20and%20Trade%20in%20West%20Africa%20final.pdf

[9] Conseil Ouest et Centre Africain pour la Recherche et le Développement Agricoles/West and Central African Council for Agricultural Research and Development

Workshop Methodology

11. The four-day workshop was organized in seven sessions. Session 1: Opening – This comprised the various welcome, goodwill and opening remarks made by the leadership of AfricaRice, CORAF/WECARD, and the World Bank. The World Bank Representative also presented the WAATP, focusing on how WAATP intends to address the challenges confronting the competitiveness of the rice value chain in West Africa. A study, "Rice Value Chain development: Guiding principles from Asia" undertaken by a World Bank consultant was equally presented in this session. In Session 2 of the workshop, the Technologies for African Agricultural Transformation (TAAT), a framework program in support of "Feed Africa" and the status of implementation of each country's (Côte d'Ivoire, Ghana, Mali, Nigeria and Senegal) strategy on rice value chain development and perspectives were presented and discussed. Summary outcomes of the AfricaRice-led studies on evidence based support for accelerating rice self-sufficiency in Africa (CIPRiSSA)and a mechanism to continuously provide support to countries striving to attain rice self-sufficiency were presented and discussed in session 3. Session 4 constituted an opportunity during which Cambodia, India and Thailand shared their various and exciting experiences on the development of the rice value chain in Asia. These preceding sessions thus set the tone of the workshop.
12. Session 5 was dedicated to four working groups, whose discussions focused on all three segments (i.e., downstream, midstream, and upstream) of the rice value chain, with experiences sharing between Asia and West Africa. The various working groups examined policies, regulations and approaches on production, productivity, aggregation, processing, quality & trade, regional synergies, design of supply chain, policy tools, public investments, risk mitigation & management; and job creation. Finally, session 6 provided an opportunity for participants to network, and for the World Bank consultant to interact with representatives from the West African countries.

Proceedings of the workshop

<u>Session 1: Opening</u>

13. The Director General (DG) of AfricaRice, in welcoming participants to the meeting, used the occasion to wish every participant a very happy new year, and specifically expressed appreciation to colleagues and partners that had travelled from afar to participate in the meeting. He specially thanked CORAF/WECARD and the World Bank for partnering with AfricaRice in organizing this workshop, stressing that the three institutions have a common goal of improving the performance of the rice value chain in Africa. The representative of the Executive Director of CORAF/WECARD, in a goodwill message, expressed how thrilled he was that West Africa was embarking on a collaboration that involved three Asian countries renowned in rice production and marketing worldwide. He acknowledged the fact that whereas the countries have taken commendable strides in local rice production, a lot remains to be done.
14. The AfDB's Director of Agriculture & Agro-Industries, the IFAD representative, the FAO Rice Focal Person, the Regional Head of AGRA, and the Senior Advisor of JICA also addressed the participants during the opening session. The AfDB focused his speech on the need for increased public-private-producer partnerships (PPPP) in the rice sector. He informed the meeting of the preparedness of AfDB to ensure their provision of loan facilities to countries. These are intended to be accompanied by proven technologies that could enhance the

performance of the rice value chain. In his remarks, the IFAD representative informed the meeting of the recent selection (i.e., eight months period) of rice and cassava as the two most important crops, for investments in Africa by IFAD. The reasons of the selection are the crops' highest potential to significantly increase food security, youth employment, and income generation in Africa. He concluded his speech with the following slogan: "Rice is the way to go." The JICA representative indicated that whereas production and productivity were hitherto a focus in Africa's rice sector, the current and future perspectives are on quality, pricing and competitiveness of locally produced rice. He expressed optimism that Africa could soon begin to contribute significantly to the global rice trade. The representative of AGRA in his remarks informed the meeting that AGRA had invested in hybrid rice, and that the institution was now focusing on agricultural transformation with attention to the value chain development of the following four crops: rice, maize, sorghum and cowpea. He expressed the readiness of AGRA to partner with AfricaRice and other institutions in enhancing the performance of the rice value chain. The FAO representative stressed on the need for ensuring that the enabling environment was right for investments in the rice sector – and in this regard, lessons from Asia would be very pertinent in the transformation of rice value chain in Africa. He also reiterated FAO's continuing fruitful collaboration with AfricaRice, and expressed the willingness of FAO to further this partnership. The Minister of Agriculture of Côte d'Ivoire, represented by the Director General of the Agence pour le Développement de la Riziculture (ADERIZ[10]), welcomed participants to Côte d'Ivoire. He assured participants that calm had returned to the country, and that the country was ready for business. He informed the participants that given the importance of rice as the staple food crop, the government has transformed ONDR to ADERIZ. The latter is a more semi-autonomous institution, with a wider scope of roles in the transformation of the rice sector in the country. He also commended the continued partnership between ADERIZ, and AfricaRice.

15. The World Bank representative expressed happiness in the efforts deployed by AfricaRice in organizing this important workshop, whose outcome he said, would contribute towards the design and preparation of WAATP project to be financed by the World Bank. He stressed the importance of using an evidence-based approach in the preparation of the WAATP project, which according to him, would provide significant leverage to the transformation of the regional agriculture. He requested AfricaRice to deploy commendable approaches in identifying segments of the rice value chain where investments could provide quick-wins to investors and decision-makers at government levels. He thanked all participants for honoring the invitation, and he specially expressed gratitude to participants from the three Asian countries for making themselves available to exchange their diverse and rich experiences on the development of the rice value chain with West Africa. He also reminded the participants of the high probability of achieving significant impact in the rice sector in West Africa, given the policy and institutional support being provided by ECOWAS[11] to the rice sector in the region through its 'Rice Offensive'[12] initiative. He stressed the growing need to enhance the competitiveness of rice produced locally, and for policy measures which promote regional and international trade in the commodity.

16. The World Bank consultant, and Senior Agribusiness Specialist, presented the preliminary findings of the rice study titled 'Rice Value Chain development: Guiding principles from Asia'.

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[10] Agence pour le Développement de la Riziculture is a new structure created by the government of Cote d'Ivoire to implement the country's rice development strategy. This organisation replaces the Office National de développement de la Riziculture (ONDR)

[11] Economic Community of West African States.

[12] Regional offensive for sustainable and sustained recovery of rice production in West Africa.

The presentation described the development of the rice value chain in Cambodia, India and Thailand; and proposed some key guiding principles for considerations for West Africa rice value chain development. He emphasized that prior to attaining the status of largest exporters of premium rice, the rice value chain in Cambodia, India and Thailand went through similar challenges currently facing West African countries namely high dominance by smallholders, aid / import dependency, low level of irrigation and necessity to build regional synergies. He stated that the experiences from Asia demonstrate that competitiveness depends on the capability to satisfy market demands with required volume in rice supply accompanied with internationally acceptable quality standards. He stated the need for efficient post-harvest handling of products and distribution to the commodity's trading and consumption points. While providing specific examples of successes recorded by rice value chain in Asia, he explained that India achieved competitiveness through a sustained process of strong government action which enabled the private sector to develop organically. Cambodia's recent rapid development of the rice sector, according to him, is built on coherent and directed government policies that particularly enable private investment. He also informed the meeting that Thailand, a traditional rice exporter, is a demonstration of the successes and challenges in balancing the private-public roles in the rice sector. According to the presentation, the Asian countries developed and implemented strategies for the upstream, the midstream, and the downstream sub-sectors of the rice value chain. Finally, he proposed some guiding principles emerging from Asia which could be used in developing the Terms of Reference for the Working Group sessions of the workshop.

17. The discussion that followed the presentation by the consultant revolved around the following: the political nature that the rice commodity has assumed in West Africa and in the international community, and hence the need for stricter control of rice imports, and promotion of local rice; development of robust strategy on commercialization which should pull-on production. The useful tip from Asian farmers' experience included the need to encourage West African rice farmer groups to grow fewer varieties in given localities. This can be achieved through contract farming which in turn facilitates large scale milling, enhances quality, and reduces grain mixing. The need to provide smart subsidies and other incentives which should empower smaller millers to grow was also recognized. The participants also stressed the need to provide more specific information in the final report on the Asian rice value chain study – especially on the challenges and successes of the different segments of the rice value chain in Asia which could be leveraged for West Africa.

Session 2: Rice value chain experience in Africa

18. The Director of Agriculture & Agro-industries of AfDB made a presentation titled 'TAAT[13] in support of the rice value chain'. He stated that the modus operandi of TAAT comes with a financing platform that engages the CGIAR centers, national systems, and regional organizations in the delivery of technologies needed to transform the agricultural sector. The investments in technologies are expected to raise the productivity of crops, increase production and availability of food. The implementation of TAAT would be centralized through Clearing House arm of the program. He stressed that TAAT provides the opportunity for AfDB to provide Lines of Credit to support the countries, value chain actors, including the private sector to adopt technologies – emphasizing that the role of the private sector would be pivotal in TAAT implementation. He also urged governments of African countries to emulate the examples of Brazil that invested much in strengthening the capacity of the value actors, and

[13] Technologies for African Agricultural Transformation.

India in investments in irrigation schemes that facilitated the transformation of their various agricultural sectors.

19. The discussion that followed the presentation was mainly on the following: the possibilities for improved water management, especially investments in small irrigation schemes that could supplement rainfed systems; the conditionality to be addressed by countries in their application to the AfDB for financing facility; the possibility of AfDB granting financing facilities to big private companies – it was also stressed that the AfDB is putting in place a Facility for Agricultural Financing in Africa which will be dedicated to financing small and medium enterprises. The issue of professionalizing the management of national research systems was also a subject of discussion during this session. The need for development partners (DP) to align their agricultural financing programs to TAAT was stressed – with most of the DPs present at the meeting echoing their preparedness to coordinate their interventions with the TAAT framework. On the question related to the operational modalities of the 'Clearing House' described in the presentation, it was clarified that the Clearing House would engage with institutions that fund the countries' agricultural development agendas to ensure the availability and the plausibility of up- and out-scaling the needed technologies, and that the enabling policy regulations exist to use such technologies in-country. It was emphasized that TAAT will consider the existing platforms to address the key issues such as seed production and climate change.
20. A series of five presentations on the central sub-theme titled 'Progress on implementation of national self-sufficiency plans and challenges facing the rice value chain' in Côte d'Ivoire, Ghana, Nigeria, Mali and Senegal were made by the CIPRiSSA Focal Persons/Rice Desk Officers from the countries. The **Ivorian** Focal Person in his presentation stated that the Cote d'Ivoire's National Rice Development Strategy (NRDS) comprises three interconnected phases – growth, consolidation and expansion – with a target of making the country a net exporter of rice by 2019. It is based on strategic components namely production and value addition with cross-cutting aspects such as technology transfer and strengthening the capacity of actors. He hinted that during the period of implementation of this strategy, the country's rice self-sufficiency rate has increased from 58% to 80%. He further informed the meeting that these results are being achieved through use of ten rice production hubs and 48 development pools which were established to sustain progress in the implementation of the NRDS. He also added that although rice production has become a profitable business in Côte d'Ivoire, several challenges still exist. These include access to improved seeds, limited mechanization and access to finance. He also stressed the need to develop and operationalize a viable rice marketing model and enact some regulations on imports to protect local production.
21. The **Ghanaian** Focal Person, in his presentation informed the meeting that total rice consumption in the country was estimated to be around 1,000,000 tons in 2016, whereas domestic production was only 475,000 tons during the same period – thus making Ghana rice import-dependent. The goal of the country's NRDS is for Ghana to attain self-sufficiency by 2023. However, the challenges to be addressed in the country's rice sector include issues on land tenure; socio-cultural issues which exclude women from land ownership, phytosanitary requirements which impede the importation of seeds; limited infrastructure – including irrigation, water and electricity. Remedial strategies include development of lowlands/inland valleys with water control structures for rice cultivation; support for the dissemination of improved rice technologies; and support for the mechanization – with emphasis on the establishment of mechanization service centers.
22. In her presentation, the **Nigerian** Focal Person, stated that the country used to import about US$ 2 billion worth of rice annually by 2014. The Government took a decision and set a target

date for attaining rice self- sufficiency by 2018. The country therefore introduced the Rice Transformation Agenda (RTA) whose initial phase was from 2012 to 2015. The goal of RTA was to increase rice production, create wealth and generate employment. The program supported rice farmers with improved seeds, subsidized fertilizers and herbicides through the growth enhancement scheme. Through this support, paddy production rose from 10.8 million tons in 2014 to 17.5 tons by 2016, and milled rice production rose from 5.2 tons in 2014 to 6.4 tons in 2016. The challenges being faced in the sector include inadequate availability of improved high yielding certified seed; the inherent high production costs; inadequate irrigation facilities; inadequate access to credit facilities; inadequate mechanization support to rice farmers; inadequate processing equipment, including facilities needed for quality assurance; insufficient production-related infrastructure – electricity supply, rural roads, portable water; and huge challenges posed by cross border smuggling of rice to neighboring countries. She informed the meeting that steps are currently being taken to address some of the challenges – including gradual rehabilitation and expansion of existing irrigation facilities; promotion of farmers' access to small equipment such as power tillers, reapers, threshers, mini combine harvesters, and dryers; and support to small-medium scale processors with modern processing equipment.

23. The **Malian** Focal Person in his presentation stated that rice covers about 31% of the total area covered by cereals production in Mali. The country's NRDS targets about 5.5 million tons of paddy production by 2025 with the ambition of supplying rice in the ECOWAS regional market. To achieve this goal, the country has mapped-out four strategic areas for action – namely capacity building of actors in the rice value chain; increasing investments in the rice sector; improving productivity and competitiveness of local rice; and the promotion of new technologies. He, however, underlined challenges associated with the country's population growth trends; uncertainties in land law; the lingering issue of employment creation for women and youth; access to agricultural equipment and to improved varieties adapted to the local environment – especially tolerant to drought and heat stresses.
24. The Focal Person for **Senegal** in his presentation stated that rice represents 34% of the national cereal consumption, and that rice imports in 2017 were 1 million tons. He hinted that the government has since 2012 been implementing the PRACAS[14] which aims to increase productivity and competitiveness of rice produced in Senegal. He pointed out that as a result, productivity has increased from 5 to 6.5 ton/ha and can even reach 10 ton/ha in irrigated areas, whereas productivity in rain-fed systems remains at 1 to 2 tons/ha. He, however, stated that there were still a lot to be done with respect to adequately organizing the value chain actors; access to appropriate mechanization services in the rain-fed areas; and the need to address low productivity in rain-fed systems. In general, he stressed the need for rice market-development, rehabilitation of the irrigation infrastructure, introduction of improved varieties that meet the market demand, increasing productivity and improving the quality of products. Provision of credit facilities has remained a major constraint especially for small millers. Post-harvest handling of produce was also stated as a challenge, especially in rainfed systems.
25. Discussion on the implementation of the NRDS was mainly on the need for improved quality of local rice; regional policy intervention through ECOWAS on cross-border trade especially on cross-border smuggling of imported rice which undermines efforts in self-sufficiency; need to always ensure that users of technology are involved in the release of new varieties. It was also recommended that countries that are on target in reaching self-sufficiency should begin to develop regional and international marketing strategies to export excess produce.

[14] Programme d'Accélération de la Cadence de l'Agriculture Sénégalaise

Session 3: Evidence-based support for accelerating rice self-sufficiency

26. In 2017, AfricaRice led the development of **CIPRiSSA** in collaboration with 10 countries across the continent. The summary of results for all 10 countries and results for the five countries participating in the workshop were presented. Results, derived from analyses carried out on the data submitted by countries, include most importantly real-time evidence-based information on projections of production and consumption of rice up to 2025; domains of the rice value chain where public and private investments should be made and the level of such investments; and the projected timelines for achieving rice self-sufficiency for each country if requisite investments are made. Results also indicated appropriate investments will not only lead the countries to attain rice self-sufficiency, profitability analysis indicated that the new investments in the continent's rice value chain would generate significant high benefit-cost ratio – BCR (NPV ratio to investment); lead to savings in foreign exchange that could have been used in rice imports; create new opportunities for employment and contribute to agricultural GDP. The speakers drew the attention of the participants to the fact that information derived from the CIPRiSSA studies could serve as a basis for countries to rationalize their declarations of target dates for reaching rice self-sufficiency as well the organization of investments in the rice sector. Most importantly, the information has revealed the growing demand for credible information appropriately analysed during the design and implementation of rice sector development strategies. It has also shown the need for each country to have an adequate and better organized rice value chain database, which could continually provide the most appropriate information that would facilitate the process of not only reaching rice self-sufficiency but also maintaining it, and preparing for exporting surplus rice produced domestically to continental and international markets.
27. The process of in-country data collection and analyses provides a most credible pathway to supporting countries in their drive to attain rice self-sufficiency. The **SSARSSA** was thus presented as an initiative that will support evidence and outcome-based policy planning and implementation of national rice development strategies of countries in Africa. The presentation stressed on the operational modalities of SSARSSA – which will tap into the continental mandate and the technical expertise of AfricaRice, working with country units, to provide the requisite strategic and analytical information tailored towards each country's priorities, as the countries strive to achieve rice self-sufficiency by 2025. Participants were informed that such information would enable policy makers, decision-takers, and investors, to make real-time and credible public pronouncements and investment decisions, based on data reliably sourced from the countries and economically and financially evaluated by competent experts in the domain. Policy actions would be more appropriately channelled towards improving the production and competitiveness of rice domestically produced in Africa, reducing the prevailing huge rice import bills, promoting food security through rice availability and affordability, and creating attractive employment opportunities for actors, especially youths and women engaged in the rice value chain. The deliverables from SSARSSA were listed as: a) Credible Africa-owned database and policy information on the rice sector established; and b) Knowledge on the status of rice self-sufficiency in Africa accessible to stakeholders.
28. During the discussions that followed these presentations participants expressed special interest in Focal Person-based processes used in CIPRiSSA data collection, collation and analyses. Participants also sought to know if the data were triangulated with existing datasets and the conclusions on the national rice self-sufficiency attainment were realistic. It was clarified that data triangulation was done using evidence from public documents and records from USDA and FAO. In addition, it was specified that more refined analysis will be done that

takes into account different scenarios such as agro-ecological zones, production systems and the impact of climate change. Participants also commended the SSARSSA initiative – expressing the need to see it go down to country levels.

Session 4: Rice value chain experience in Asia

29. The **Cambodian** representative informed the meeting that although agriculture contributes 26% to the GDP of the country, the main strategy for rice policy (2010-2015) was established based on credible data collection with a focus on promoting premium rice production of a target volume of 4 million tons of paddy – thus transforming Cambodia into the 'rice basket'. The strategy also envisioned to make the country a major rice exporter with a target to internationally market 1 million tons annually within the same period. He stressed that the Cambodian strategy was focused on the following four main themes: enhancement of rice productivity and production; investment on paddy collection and processing capacity; export facilitation and logistic development; and market information and promotion. Although the country did not attain its export target of 1 million tons, it was able to export 635,000 tons by 2017. The focused strategy and a government-supported enabling environment mainly drove the country's success. He informed the meeting that lessons learnt include the following:

i. Paddy production
   - a) Choice of appropriate varieties considering the market demands and ecosystem suitability,
   - b) Good seed production system to ensure high quality, wide and timely accessibility by producers,
   - c) Sustainable and environmentally friendly approaches to quality and safety,
   - d) Contract farming mechanism for paddy production to match supply and demand,
   - e) Potential zones for rice production, land consolidation (small farm but big field),
   - f) Appropriate policy that facilitated credit to farmers to be invested in paddy production,
   - g) Collaboration between government, farmers and private sector,
   - h) Crop diversification instead of rice farming as monoculture.

ii. Processing and storage
   - a) Ensuring the availability of sufficient resources for timely paddy collection at harvest,
   - b) Providing sufficient and appropriate capacity for paddy drying and storage close to the production sites,
   - c) Availability of sufficient modern milling facilities for processing and marketing rice in compliance with international standards.

iii. Lessons on Trade/Export
   - a) Trade marking/branding for high quality products accompanied with active promotion in the national and international markets;
   - b) Market search to facilitate rice sales through government agencies and private companies;
   - c) Provision of transport infrastructure – roads, and sea ports for evacuation of produce;
   - d) Trade facilitation – including the availability of inspection mechanism and laboratory facilities; and
   - e) One window service (for tax and customs clearance) to reduce transaction cost and speed up the export formality process.

30. The representative of **Thailand** stated that rice remains the backbone of the economy of the country, and that the country ranks the second rice exporter, after India. She hinted that country's rice self-sufficiency between 2011-2013 was 182% - thus leaving the country with huge surpluses. She informed the meeting that Thailand is currently implementing a new National Rice Strategy (2016-2020), which revolves around production and marketing:
    i. Production system - Zoning, farmers' database, management of production system, site specific technology, biotechnology/farm machinery, intensive farming, quality seed supply system using the Fried-Egg Model, inspection & certification for Good Agricultural Practice (GAP)/ Good Agriculture and Manufacturing Practices (GAMP), value adding, traceability;
    ii. Marketing system – Enhance private sectors roles in marketing, enhance local farmers' marketing abilities, strengthen contract farming, strengthen agriculture future market, profit-revenue sharing, strengthen fair trade, develop Consumer Supported Agriculture (CSA model), public sector's involvement in facilitating export markets.
31. The **Indian** representative presented the country's experience in attaining rice self-sufficiency. According to him, the key policy approaches used by India to attain self-sufficiency include intensive public investments – in extension; research; and subsidizing inputs. The Government also provided supportive policy environment by establishing corporate bodies to buy paddy from farmers; and a public distribution of inputs at subsidized rates. Thus, the country has been a regular exporter of rice since the mid-1980s. He added that currently, private corporations are playing the following roles: supply of inputs; development and management of certain agricultural infrastructure, especially storage facilities; collateral financing of various segments of the value chain; processing of various rice products (rice bran oil, defatted rice bran, use of rice husk, rice wine, etc.). He also emphasized the importance of Food Corporation of the country that distributes food grains throughout the country, the Commission for Agriculture Coast and Pricing (CACP), and the decentralization of rice milling. He made the following suggestions that could improve rice yields and sector performance in West Africa: efficient water management; crop rotation; replacement of seeds; regulation of rice import/export; introduction of a dynamic trade and tariff policy; engagement with the private sector; and a good political will.
32. The discussion that followed the sharing of Asian experiences was hinged on the following: the aging population of farmers in both India and Thailand; mechanism for implementation of price support in India; provision of extension services by the private sector; clarifications on needed institutional changes needed to boost rice self-sufficiency in Africa; lessons from India's experience in rice export; need to build capacity in renewing the seed stock. Clarifications were also provided on the relatively low income earned by farmers in Asia as compared with the other actors in the downstream segment of the value chain. The Cambodian representative clarified that zoning of production is based on the principle of targeting niche markets – each zone is mandated to produce for specific international markets – this practice led to Cambodia being internationally rated as having the best rice quality.

<u>Session 5: Distilling lessons learned from Africa, and from Asia</u>

33. The participants were divided into 4 working groups. Each working group included at least a participant from Asia, private operators from Africa and a mix of Focal Persons/Rice Desk Officers from the West African countries. The groups discussed and teased-out lessons on the following: productivity, production, quality issues, aggregation, processing, rice trade, regional synergies, design of supply chain, policy tools, public investments, risk mitigation, and job creation.

- Create and sustain a viable seed system: Encourage private sector operators to invest in seed production. They may want to finance contract with farmers-based organizations to produce seeds of a specific rice variety. Farmers should also be encouraged to regularly renew their seed stock.
- Zoning of production sites: Each zone should select one or two suitable varieties depending on its targeted agro-ecologies to concentrate production. This will increase homogeneity of grains and facilitate the production for niche markets. Precision farming is also needed for niche markets.
- Climate change: This is affecting the cycle and zones of rice production. Climate smart technologies, including conservation agriculture need to be developed, disseminated and scaled up at a large scale
- Access to working capital: This is a central issue that limits the purchase of paddy from producers – innovative credit facilities are needed to facilitate this.
- Rice of Premium Quality: To ensure a better quality of the end produce, actors of the value chain should endeavor to keep seed purity on the farm and paddy homogeneity during the aggregation and processing stages. Also, most appropriate processing techniques should be used in milling, including paddy cleaning, removal of impurities (chaff and stones), destoning, polishing, and grading to increase the quality of local milled rice and promote its consumption. Considering consumers' preferences (e.g., swelling capacity, taste, aroma, grain shape, etc.,) during rice breeding and processing would greatly enhance milled rice quality. Quality and safety need to be regularly controlled through independent surveys.
- Pricing of Local Rice: To encourage consumption of local rice against imported rice, competitive pricing needs to be encouraged through increased subsidies to segments of the value chain. Such subsidies should aim at reducing the production costs and transaction costs of the value chain – thus transcending the lower costs to the final consumer. West African governments and rice producers need to launch a grand and more vigorous campaign promoting the purchase and consumption of local rice. A further step to reduce the cost of local rice would be to reduce the number of intervening actors in the value chain. Reasons for the lower pricing of some imported rice are not clear – and should be studied especially because most consumers are price-sensitive, hence they purchase such imported rice at lower costs.
- Packaging and Branding: Improved packaging and branding should be a standard practice in the marketing of local rice – these enhance the presentation and value of the produce.
- Consistency of Appropriate Supply levels: Ensuring consistent availability of local rice throughout the year to increase its consumption– Ensure good quantification of the demand and supply balance.
- Lobbying for international organizations to purchase local rice: International organizations such as World Food Program and relief organizations should be encouraged to source their supply locally from African countries rather than imports, especially when the locally produced rice meets the required quality standards.

34. **Public investments lessons** include the following:

- Rehabilitate and expand irrigation and water management facilities – ensuring appropriate management of the irrigation schemes as well as efficient water management techniques;

- Provide weather information – fund climate resilient actions; and development of climate-smart varieties including resistance to flood, and drought/heat, salinity and iron toxicity, and early maturing.
- Develop proper seed production, purification, certification and distribution systems with rigorous and regular quality control.
- Storage infrastructure – including drying facilities;
- Transportation infrastructure (roads) and other investment in rural infrastructure (e.g., market facilities);
- Promote use of rice-related technologies;
- Extension and advisory service should provide knowledge and skills to famers to build their capacity as professionals. In addition, regular demonstration coupled with training should be provided on how to use technologies to enhance productivity as this will encourage end-users adopt the technologies;
- Provision of credit facilities;
- Strengthen and upgrade the capacity of agro-dealers;
- Strengthen farmers' organizations; improve the skills of the work force;
- Facilitate contractual arrangement between farmers, paddy collectors and millers –to ensure use of good quality seeds and farming practices while ensuring a market for the produce;
- Establishment of state-of-the-art rice milling facilities – on a public-private-partnerships basis. Develop clusters for common rice processing facilities;
- Sensitization of traders, consumers on pertinence of quality;
- Establish a unit of quality inspectors – which could be private or public from the national level to the lower level. Quality inspection could begin at the producers group levels also;
- Markets should drive rice production – identify the market demand and organize the rice value chain to meet that demand;
- Establishment and consolidation of regional markets – which provide guarantees to producers.

35. **Policy interventions lessons**:
    - Establish policy that dedicates lowland areas as reserves for rice production – develop areas for rainfed rice;
    - Facilitate access to land for both small and big investors in the rice sector;
    - Regulate and strengthen the input delivery system – ensure access to quality inputs - certified seeds, fertilizer & agro-chemicals - at right time, at an affordable price and in all places, including remote areas;
    - Develop and sustain a policy on easier access to credit, enhancing economies of scale to improve on profitability and management, easy access to market information, better capacity to benefit from technology by actors;
    - Ensure a viable seed policy;
    - Develop a policy on farmers' seed replacement;
    - Develop and sustain a comprehensive rice mechanization strategy;
    - Formalize contracts for rice niche markets;
    - Encourage farmers' groups to develop bankable business plans;
    - Encourage formal contracting between parties at all levels;
    - Encourage crop insurance policies could assist farmers in mitigating the losses during disasters;

- Increase the capacity for upgrading of technologies used on farm - to benefit market access, and increase the capacity to access investment and operational funds;
- Develop a policy that established and sustains trust between value chain partners – especially motivating private investment – and retain the work with the smallholder farmers;
- Introduce policies that empower local producers to withstand competition from imports;
- Ensure a minimum guaranteed price of paddy (pre-season, pre-harvest) and establish a public company to buy and maintain buffer stocks; and buffer price fluctuations;
- Develop aggregation centers in major production areas to provide millers with good quality paddy but also regulate the aggregators through registration and monitoring;
- Create an enabling environment for contractual arrangements between producers and millers;
- Develop standard for mills – ensuring produce cleaning, polishing, destoning, color sorting, grading, etc.;
- Subsidize milling equipment – exempt their importation from taxes; reduce agricultural input costs (e.g., reduction of the electricity cost for agricultural pump irrigation);
- Establish and enforce quality standards - building capacity on quality standard;
- Monitor incoming imported rice at the regional and country levels;
- Introduce and sustain a massive public policy campaign to promote local rice and favor local procurement in public markets.
- Provide support to branding – this is a trigger to the private sector;
- Ensure the country's Chamber of commerce brings forward discussions on rice policy issues;
- Strengthen policy on trade and a dynamic policy on Tariff to regulate imports;
- Implement a policy on good governance and transparency;
- Provide tax incentives to investors in the sector;
- Ensure all actors in the value chain leverage synergies in the rice value chain; implementation of ECOWAP regional policies should be strengthened.

Session 6: Interactions and networking This session was dedicated to exchange of contacts between participants, and individual interviews of the World Bank Consultant with the various stakeholders of the rice value chain. Results of these interviews will be presented in the report of the Bank-commissioned rice study.

Session 7: Closing

36. The closing session was presided over by the representative of the Executive Director of CORAF/WECARD. The proceedings of the closing session included the following:

    b. **Outcome** from the various discussions of the workshop could be summarized as follows

    - Increased knowledge on the drivers of performance at the upstream, midstream and downstream segments of the rice vale chain in Asia, and those drivers which could contribute to improving the performance of the rice value chain in West Africa.
    - Increased knowledge on the strengths and weaknesses of the rice value chain in contributing to achieving the objectives of the national rice development strategies (NRDS) of West African countries.
    - Increased knowledge on priority areas for additional investments as well as the level of additional investments in the rice value chain for the five West African countries (Cote d'Ivoire, Ghana, Mali, Nigeria and Senegal) to accelerate the attainment of rice self-

sufficiency; and evidence-based estimations of timelines for attaining rice self-sufficiency, which should aid policy pronouncements.

- Policy options that would aid investment decisions by both public and private sectors when translated to policies at both national and regional levels.

c. **Recommendations –** The participants made the following general recommendation:

- ***Data***: The ongoing work on credible data collection and analyses to guide investments in the rice value chain needs to be sustained.
- ***Continental Plan for Accelerating Rice Self-sufficiency in Africa (CIPRiSSA)***: More than one scenario/options for the implementation of CIPRiSSA should be proposed with the aim of proposing realistic estimates and time-lines for attaining rice self-sufficiency, associated investment requirements and their profitability.
- ***Synergy creation between various rice value chain initiatives***: Various initiatives on rice value chain enhancement in each country should speak to the NRDS and this could be achieved through the establishment of the Support System for Accelerating Rice Self-Sufficiency in Africa (SSARSSA) proposed by AfricaRice.
- ***Production***: The establishment of farming groups in various agro-ecological zones that would grow fewer rice varieties (1 to 2) as opposed to the several varieties grown by farmers, would reduce grain mixing and would be an incentive in capturing the lucrative urban, regional and international rice markets in Africa.
- ***Policy***: Governments should pursue their support to the continued development of the rice value chain with focus on the establishment and implementation of adequate public policies and improved basic infrastructure, such as storage facilities, access to roads, power supply, and irrigation facilities.
- ***Marketing strategy***: The classification of quality milled rice in West Africa, aimed at targeting different markets with different pricing, should be encouraged. Cross border paddy trade that enables other countries to process rice and add value, for their markets, should be examined.

d. Next steps: The following next steps were proposed:

- Produce a one pager on outcome of this workshop – February 1, 2018
- Report of this Workshop - February 14, 2018
- Policy brief (first draft) from the workshop report– February 21, 2018
- Country activities: in-country additional data collection by World Bank Consultant - February, 2018
- Final report of the Asian study led by World Bank –
    - Circulation of draft report by World Bank Consultant – April 2018
    - Final report end-May, 2018
    - Technical dissemination of report and workshop – end of May 2018
- Sustaining the momentum – Expanding and sustaining the CIPRiSSA studies to other countries by SSARSSA – from February 2018
- Plan for CIPRiSSA in Burkina Faso and Liberia (supported by WB/WAAPP) – March 2018
- Expanding WAATP to other countries
    - WAATP approval – June/July, 2018

Closing remarks:

The issues raised during closing remarks included expression of gratitude by a representative from the three Asian countries; a representative of the private sector; a representative of the West African countries; a representative of the producer associations; and a representative of the development partners. The DG of AfricaRice, the World Bank representative and representative of the Executive Director of CORAF/WECARD acknowledged the great effort deployed towards the organization of the workshop, and thanked all that were involved in the planning and execution the various tasks leading to the successes achieved during the workshop.

Annex 1: Concept Note

A consultation workshop on comparative rice competitiveness: lessons learnt on successful development of rice value chains in Asia for West Africa

January 29th – February 1st, 2018

Abidjan, Côte d'Ivoire

1. Context and justification

The West Africa Agriculture Transformation Program (WAATP/PTAAO) is a World Bank financed and facilitated regional program, which aims at accelerating the adoption of improved technologies, creating jobs for youths and strengthening the enabling conditions for access of priority agricultural commodities of countries participating in the program to regional markets. WAATP builds on the achievements of the West Africa Agricultural Productivity Program (WAAPP/PPAAO), also a World Bank facilitated regional program, implemented in 13 ECOWAS member states[15]. In fact, WAAPP provided a regional framework for participating countries to collaborate and implement national and regional agricultural strategies on technology generation and dissemination, which are related to national and regional priority commodities. WAATP is currently being prepared by the following seven countries in West and Central Africa: Burkina Faso, Cameroon, Cote d'Ivoire, Ghana, Liberia, Nigeria, and Sierra Leone. The Executive Secretariat of CORAF/WECARD[16] was mandated by the Economic Community of West African States (ECOWAS) to coordinate both WAAPP and WAATP at the regional level. CORAF/WECARD therefore works with national coordination units to ensure the effective implementation of various projects in the beneficiary countries.

WAATP, however, goes beyond agricultural productivity to address the overall issue of improving agri-food systems to meet the demands of an ever-growing population in West Africa. A priority objective of most countries in West and Central Africa is achieving rice self-sufficiency. Key elements for improving agri-food systems in general and rice supply chains in the region in particular, are appropriate development of the institutional and policy environment and appropriate public and private investments. The World Bank has thus commissioned a study on rice value chains, to draw lessons from Asia, which could be applied to West Africa. Case studies focused on countries in both Asia and West Africa, as follows: for Asia - (Cambodia, India, and Thailand) and for West Africa (Cote d'Ivoire, Ghana, Mali, Nigeria, and Senegal).

Still within the context of responding to the objective of rice self-sufficiency, AfricaRice is leading the development of a "Continental Investment Plan for accelerating Rice Self-Sufficiency in Africa (CIPRiSSA)". So far case studies have been realized in the following ten pilot countries: Cameroon, Cote d'Ivoire, Ghana, Madagascar, Mali, Nigeria, Senegal, Sierra Leone, Tanzania, and Uganda. CIPRiSSA will in general facilitate the acceleration of self-sufficiency in rice in Africa and contribute to food security. Most significantly, it will identify priority segments of the rice value chain for investment in these countries. The initiative will also enhance the involvement of the private sector in boosting the rice sector, contribute to job creation, and increase Africa's market share in global market trade.

The World Bank proposes to organize a four-day stakeholder consultation workshop that will examine the results (outputs, outcomes and lessons learned) from both the rice value chain study and CIPRiSSA. The workshop will be held from January 29th to February 1st, 2018 at the office of the Africa Rice Center in Abidjan, Cote d'Ivoire.

[15] ECOWAS: Economic Community of West African States. WAAPP's beneficiary countries are: Ghana, Mali, and Senegal under WAAPP A; Burkina Faso, Cote d'Ivoire, and Nigeria under WAAPP B; and Benin, Gambia, Guinea, Liberia, Niger, Sierra Leone, and Togo under WAAPP C series. (http://www.waapp-ppaao.org/en)

[16] CORAF/WECARD: The West and Central African Council for Agricultural Research and Development (http://www.coraf.org/en/)

2. Objective of the workshop

The objective of the workshop is to improve the suitability and relevance of guiding principles drawn from a study of Asian countries for the development of effective and efficient rice value chains in the region.

3. Methods of work

The workshop will include one and half day of experience sharing on rice value chains in Asia and Africa. An International Consultant and AfricaRice will, through presentations, share their experience on emerging learning and/or guiding principles from chosen Asian and African countries, respectively. Representatives from Asia, working in the rice sector, will also share their experience with workshop participants. Similarly, country representatives from Africa will present their national rice self-sufficiency plans, progress achieved and challenges encountered. Each presentation will be followed by general discussions to allow deeper insights, better understanding, feedback, and contributions for improvement. Participants will, in group work, discuss further on specific issues identified during the general discussions. The remaining two and half days will be allocated to individual interviews and networking among participants.

4. Expected outputs and deliverables

The following outputs are expected from the workshop:

a) Progress made by selected countries to achieve the objectives of the national plan and challenges encountered identified;
b) Lessons learnt and/or guiding principles drawn from Asian countries established;
c) Guiding principles for the development of customized learning on the development of rice value chains for each target West African country established;
d) Next steps for implementation of recommendations established.

Workshop deliverables will include a synthesis of the feedback from group and individual discussions with guiding principles to develop customized learning and recommendations for each target West African country. This deliverable will be produced upon completion of the workshop.

These recommendations will be disseminated and validated in a separate dissemination workshop scheduled for either late March or early April, upon completion of the rice study. The final recommendations will be considered in the implementation plan of WAATP.

5. Venue and date

Venue: AfricaRice Office, Abidjan, Cote d'Ivoire

Date: The meeting will be held from January 29th to February 1st, 2018.

6. Participants

The workshop will draw participants from selected countries, inter alia:

- Government representatives from targeted countries involved in the rice value chain study;
- Key stakeholders from the private sector including millers, importers, providers of storage facilities, etc.;
- Donors with interest in / operating within the rice in focus countries;
- Banks / Financial institutions active in agriculture, especially those investing in the rice sector;
- Key NGOs active in rice value chains; and
- Representatives from each selected Asian country.

Annex 2: Agenda and presentations (click on blue colored link to open each power-point document).

A consultation workshop on comparative rice competitiveness: lessons learnt on successful development of rice value chains in Asia for West Africa

January 29th – February 1st, 2018, AfricaRice, Abidjan, Côte d'Ivoire

Facilitator of Workshop: Marcel Nwalozie

Date/Time	Chair	Rapporteurs	Agenda Item	Title	Presenter/Facilitator
Day 1 29/01/2018	**DG AfricaRice**	**Session 1: Opening**			
0900-0910		Dr. Mandiaye Ndiaye	1	Welcome remarks	DG AfricaRice
0910-0920			2	Goodwill message by CORAF/WECARD	ED CORAF/WECARD Representative
0920-0930			3	Opening speech	WB
0930-1000			4	Self-Introduction of participants	Self
1000-1015			5	Agenda of the workshop Objectives, outputs, deliverables,	WB & AfricaRice
1015-1030			6	The rice value chain as a premium priority in the World Bank-financed West Africa Agriculture Transformation Program (WAATP)	Abdoulaye Toure - WB
1030-1100			7	Key findings, knowledge gaps from the World Bank-led on-going rice value chain study and expectations from this workshop	Aman Khanna - WB
1100-1130			8	**Discussion**	
1130-1145				Group Photo/Health break	
	Abdoulaye Toure – WB	**Session 2:** **RVC experience in Africa**			
1145-1200		Dr. Gaudiose Mujawamariya	9	TAAT in support of the rice value chain	Martin Fregene - AfDB
			10	Progress on implementation of national self-sufficiency plans and challenges facing rice value:	

				a. Côte d'Ivoire b. Ghana c. Nigeria d. Mali e. Senegal	
1200-1215			11		Yves Dirabou
1215-1230			12		Alhassan Imoro
1230-1245			13		Fatima Aliyu (Mrs)
1245-1300			14		Adama Yaya Diarra
1300-1315			15		Abdoulaye Fall
1315-1345			16	**Discussion**	
1345-1445				Lunch Break (Group Lunch)	
	Moulaye Kande -DG SEDAB - SARL	**Session 3** **Evidence based support for accelerating rice self-sufficiency**			
		Dr Sali Ndindeng	17	Evidence-based support for accelerating rice self-sufficiency: role of rice value chain segments a. CIPRiSSA Summary Result b. Côte d'Ivoire c. Ghana d. Nigeria e. Mali f. Senegal g. SSARSSA – Sustaining the momentum	
1445-1500					Aminou Arouna
1500-1515			18		Yves Dirabou
1515-1530			19		Alhassan Imoro
1530-1545			20		Fatima Aliyu (Mrs)
1545-1600			21		Mandiaye Diagne
1600-1615			22		Abdoulaye Fall
1615-1630			23		Marcel Nwalozie
1630-1645				Health Break	
1645-1730			24	**General Discussion – for all of Day 1**	
Day 2 30/01/2018					
	Mohammed Abubakar – Chair RIPAN,	**Session 4** **Rice Value Chain Experience in Asia**			
		AGRA's Model in engaging partners to deliver technologies			Fadel Ndiame

		Dr. Aminou Arouna	25	Asian experience on the development of rice value chains	
0900-0920			26	a. Cambodia	Ngin Chhay
0920-0940			27	b. India	G. Chandrashekhar
0940-1000			28	c. Thailand	Ladda Viriyangkura
1000-1045			29	**Discussion**	
	Mbene Faye – Min of Agric, Senegal	**Session 5a: Working session: Distilling lessons learned for Policy Support (African Experience)**			
1100-1130			30	Creation of Working Groups (WG) – ToR/Description of Tasks for WG: **Asian-African Exchanges** - Working Sessions (2 Groups)	Marcel Nwalozie
1130-1630			31	Group 1: Trade, quality, production, productivity, processing & aggregation, regional synergies;	
1130-1630			32	Group 2: Trade, quality, production, productivity, processing & aggregation, regional synergies;	
0900-1300			37	Group 3: Design of supply chain, policy tools, public investments, risk mitigation & management; job creation	
0900-1300			38	Group 4: Design of supply chain, policy tools, public investments, risk mitigation & management; job creation	
		Session 6 Interactions and networking			
1545-1800			42	One-on-One Interactions of WB Consultant with individual African Country Representatives participants/Selected actors	Aman Khanna – WB Naomi Sakane - WB
1545-1800			43	Participants networking	All
Day 4 **01/02/2018**					
0900-1000			44	One-on-One Interactions of WB Consultant with individual African Country	

				Representatives participants/Selected actors;	
0900-1000			45	Participants networking	All
	ED CORAF/WECARD		Session 7 Closing		
1000-1030			46	Summary of workshop outputs/Next steps	AfricaRice/WB/CORAF/WECARD/AGRA/Asian Participants/Representative from African countries
1100-1130			47	Concluding/closing remarks	DG AfricaRice/WORLDBANK AND CORAF/WECARD
1300-1400				Lunch Break (Group Lunch)	
END					

Annex 3: List of participants at the Rice Value Chain Workshop January 29th to February 1st, 2018

S/N	Name	Position	Institution / Organization / Country	Email, Phone number
Government Representatives				
1	Dr Mbene Faye	Agricultural Policy Expert	Ministry of Agriculture, Dakar Senegal	mbene.faye@maer.gouv.sn
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7	Mr. Moustapha SISSOKO	CIPRiSSA Focal Person	Ministere de l'Agriculture, Bamako, Mali	moustaphasissoko2002@yahoo.fr
8	Mr. Al-Hassan Imoro	CIPRiSSA Focal Person	Accra, Ghana	hassan_umarr@yahoo.co.uk
Private Sector (millers, seed companies, rice importers, etc.)				
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11	Mr. Mory Diabate	DG	AMC-FC Rice Millers & Seeds Company	m.diabate@amc-fc.com
12	Mr. Eyram Amovin-Assagba	Country op. and Partnerships Coordinator	Grow Africa	eyram.amovin-assagba@growafrica.com
13	Mamadou Diaby	DG	Moulins Blancs, Cote d'Ivoire	mamadoudiaby174@gmail.com
14	Hon. Mohammed Abubakar	Chairman of Rice Processors	RIPAN, Abuja, Nigeria	mmaifata@yahoo.com
15	Maxwell Mensah		RMG Rice milling and marketing company, Accra,Ghana	maxwell.mensah@rmgconcept.com
Representative from Asia – Cambodia, India & Thailand				

16	Dr. Ngin Chhay	Director	Department of Rice Crop Ministry of Agriculture, Forestry and Fisheries (MAFF) Phnom Penh, Cambodia	chhay.ipm@online.com.kh chhay.ipm@gmail.com
17	Ms. Cheu Ponleu	Cambodian Agriculture Value Chain Program (CAVAC)	Cambodia	CheuPonleu@cavackh.org
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19	Ms. Ladda Viriyangkura	Government Officer Expert on Rice Inspection and Certification	Ministry of Agriculture and Cooperatives; Rice Department, Thailand	laviri@hotmail.com ; ladda.v@rice.mail.go.th
Development Partners – (AfDB, USAID, FAO, GiZ, AGRA, BMGF, WB, IFAD, JIICA)				
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30	Dr. Fadel Ndiame	Regional Head, West Africa	AGRA, Accra	FNdiame@agra.org
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34	Mr. Stephen Debre	GiZ-CARI	Ghana	stephen.debre@giz.de

Coalition for Africa Rice Development (CARD)				
35	Mr. Ibrahima SALL	Consultant	CARD, Senegal	ibasall@orange.sn ibasall@yahoo.fr
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42	Mr. Bakary Krubally	Director of Aid Coordination	Ministry of Finance and Economic Affairs, The Gambia	bakary.krubally@yahoo.com
AfricaRice				
43	Dr. Harold Roy-Macauley	DG	AfricaRice	H.Roy-Macauley@cgiar.org
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