

RICE PRODUCTION AND CONSUMPTION IN WEST AFRICA

Rice: A strategic commodity in West Africa

Rice has become a commodity of strategic significance across much of Africa. Driven by changing food preferences in the urban and rural areas and compounded by high population growth rates and rapid urbanization, rice consumption in sub-Saharan Africa has increased by 5.6% per annum between 1961 and 1992, more than double the rate of population growth, with consumption and production spreading well beyond their traditional centres in West Africa and Madagascar. West Africa has become a significant player in world rice markets precisely because of its increasingly significant share of world rice imports, which stands now at 8.4%

Rice: A major staple food in West-Africa

Rice consumption in West Africa has been steadily growing at an annual rate of 6% since 1973, with most of this growth being caused by substitution for traditional coarse grains, roots and tubers. Consequently, its share in cereal consumption has reached 26% from 15% in 1973. Rice is now providing more than third of cereal calorie intake in West Africa in general, and up to 85% in traditional rice producing countries like Gambia, Guinea-Bissau, Guinea, Sierra Leone, Liberia and Côte d'Ivoire. The FAO projects that annual growth in the West African rice consumption will remain high, at 4.5%, through the year 2000 and beyond.

West Africa's rapidly rising rice import

West Africa's rice production has not been able to match growth in demand (see figure 1 and Table 1). Rapidly rising imports (8.4% growth per annum since 1997) has been filling the widening gap between regional supply and demand. Rice imports stood at 2.6 million tons in 1990-1992 representing an estimated \$750 million in scarce foreign exchange from the region each year. FAO had projected imports to increase to 4 million tons by the year 2000, raising the annual foreign exchange outflow to more than \$1 billion.

Major rice ecologies and production trends in West Africa

The slow growth in domestic rice production has been attributed to the very low yield being achieved by West African rice farmers. The major rice production systems are upland, hydromorphic and rainfed lowland which together occupy more than 74% of area cultivated (see Table 2). The intensified irrigated and improved rainfed lowland systems are expanding rapidly. Rice yields grew faster than cropped areas during the 1980s, but has been stagnant since the early 1990s. Consequently, the modest growth in production achieved in the 1990s has been due solely to an expansion of cultivated area at an annual rate of 3.5% (Lancon and Erenstein, 2002).

Changing government policies

Increasing domestic rice production to satisfy the growing rice consumption and reduce rice import has been a top priority for every West African government, which have devoted significant resources toward that goal in the past thirty years (Pearson,

Stryker, and Monkey, 1981; Randolph, 1994). Yet, with few exceptions the increased in domestic rice production has been very modest even in countries with good potential like Cote d'Ivoire and Nigeria. There has been a shift from a state led development until the end of the eighties to the gradual liberalization of the rice economy in the nineties. By the end of the 1990's, non-tariff trade barrier against rice importation were abolished, while most of the various mechanism through which government were supporting domestic rice production and marketing were dismantled.

Table 1: Evolution of production, import and consumption of rice in West Africa

	1961-1974	1975-1984	1985-1994	1995-1998
Average totals per year				
Production (1,000t)	1,335	2,081	3,456	4,567
Import (1,000t)	424	1,340	1,982	2,423
Consumption (1,000t)	1,336	2,852	4,688	6,234
Per capita consumption (kg)	26	33	39	43
Average growth rates (percent)				
Production	3.9	3.8	3.8	3.7
Import	9.0	9.2	9.4	9.3
Consumption	6.3	6.2	6.2	6.2
Per capita consumption	2.0	2.1	2.0	2.0

Source: FAO, 2000.

Figure 1: Evolution of total production, import and consumption of rice in West Africa

Source: Rice Trends in Sub-Saharan Africa, WARDA, 2000.

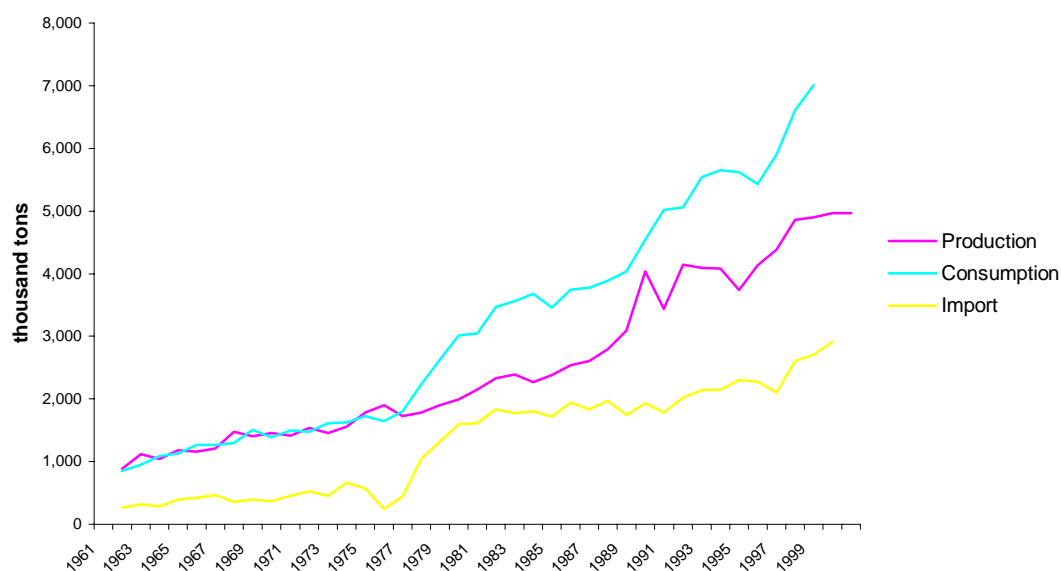


Table 2: Share of rice ecologies in rice planted areas by country.

Country	Total area '000 ha	Share of national rice area under : (%)					Year of reference
		Mangrove Swamp	Deep-water Floating	Irrigated Lowland	Rainfed Lowland	Rainfed Upland	
Mauritania	23	0%	0%	100%	0%	0%	95
Senegal	75	8%	0%	45%	47%	0%	91/93
Mali	252	0%	64%	21%	12%	3%	94
Burkina Faso	25	0%	0%	27%	65%	8%	93
Niger	28	0%	50%	50%	0%	0%	92
Chad	31	0%	92%	2%	6%	0%	98
Cameroon	15	0%	0%	98%	2%	0%	93
Gambia	19	14%	0%	7%	64%	16%	88
Guinea-Bissau	65	49%	0%	0%	22%	29%	94
Guinea	650	13%	10%	5%	25%	47%	91
Sierra Leone	356	3%	0%	0%	29%	69%	91/94
Liberia	135	0%	0%	0%	6%	94%	90/91
Cote d'Ivoire	575	0%	3%	6%	12%	79%	91/92/94
Ghana	81	0%	0%	15%	15%	70%	94
Togo	30	0%	0%	2%	18%	80%	94
Benin	9	0%	0%	4%	4%	91%	94
Nigeria	1642	1%	5%	16%	48%	30%	96
Total West Africa	4011	4%	9%	12%	31%	44%	

Source: FAO and West African National Agricultural Research System.