

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## Senegal

### Grain and Feed Annual

#### 2019 West Africa Rice Annual

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**Report Highlights:**

For marketing year (MY) 2019/20 (October to September), total area and rice production levels for Burkina Faso, Guinea, Mali, and Senegal are projected at 3.16 million hectares (HA) and 4.42 million metric tons (MMT), rising by one and 2.5 percent on expectations of strong prices and input subsidies that may influence planting decisions and good weather. MY 2019/20 total imports are estimated to rise approximately 10.5 percent to 3.5 MMT based on population growth and expectations of competitive international prices. MY 2018/19 total area and production levels are estimated at 3.13 million HA and 4.31 MMT, up 1 and 3 percent on strong prices and good weather, although rice area for Burkina Faso fell by 3 percent because farmers reportedly switched to other crops that require less water. This annual report primarily focuses on providing an overview of Guinea; it includes an abridged analysis for Senegal, Mali, and Burkina Faso.

**TABLE OF CONTENTS**

**I. Executive Summary 3**

**II. Guinea 3**

**Production 3**

**Fertilizer, Herbicides, and Insecticides 5**

**Seeds 5**

**Processing and marketing 6**

**Consumption 7**

**Stocks 8**

**Trade 8**

**Policy 9**

**III. Senegal, Mali, and Burkina Faso 9**

**Senegal 9**

**Production 9**

**Consumption 9**

**Trade 9**

**Policy 10**

**Mali 10**

**Production 10**

**Consumption 10**

**Trade 10**

**Policy 10**

**Burkina Faso 11**

**Production 11**

**Consumption 11**

**Trade 11**

**Policy 12**

**IV. Production, Supply and Distribution Statistics 13**

## **I. Executive Summary**

This annual report primarily focuses on providing an overview of Guinea; it includes an abridged analysis for Senegal, Mali, and Burkina Faso.

For marketing year (MY) 2019/20 (October to September), total area and rice production levels for Burkina Faso, Guinea, Mali, and Senegal are projected at 3.16 million hectares (HA) and 4.42 million metric tons (MMT), rising by one and 2.5 percent on expectations of strong prices and input subsidies that may influence planting decisions and good weather. MY 2019/20 total imports are estimated to rise approximately 10.5 percent to 3.5 MMT based on population growth and expectations of competitive international prices. MY 2018/19 total area and production levels are estimated at 3.13 million HA and 4.31 MMT, up 1 and 3 percent on strong prices and good weather, although rice area for Burkina Faso fell by 3 percent because farmers reportedly switched to other crops that require less water.

For Guinea, marketing year (MY) 2019/20 (October to September) area is forecast at 1.815 million HA on expectations of strong prices that may influence planting decisions and increased use of modern farm equipment (e.g., tractors) in certain commercial production areas, such as in the Maritime and Upper Guinea regions, that may extend planted area. MY 2019/20 rice production is projected at 1.65 MMT on expectations of good weather. MY 2018/19 area and production levels are estimated at 1.81 million HA and 1.6 MMT, rising slightly on reported use of more modern farm equipment and good weather. Post estimates MY 2019/20 and MY 2018/19 rice imports at 850,000 MT and 750,000 MT on population growth.

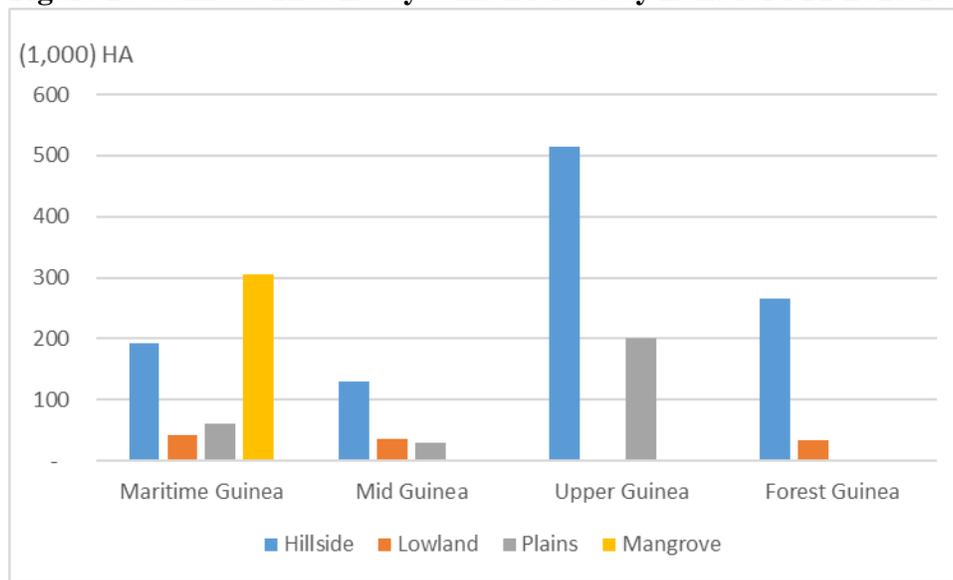
## **II. Guinea**

### **Production**

Marketing year (MY) 2019/20 (October to September) area is forecast at 1.815 million HA on expectations of strong prices that may influence planting decisions and increased use of modern farm equipment (e.g., tractors) in certain commercial production areas, such as in the Maritime and Upper Guinea regions, that may extend planted area. MY 2019/20 rice production is projected at 1.65 MMT on expectations of good weather. MY 2018/19 area is estimated at 1.81 million HA, up from the previous year on reported increased use of modern farm equipment in the aforementioned commercial areas that may gradually extend planted area. MY 2018/19 production is estimated at 1.6 MMT on generally good weather, although drought reportedly affected hillside rice production areas in the Mid and Maritime Guinea Regions. MY 2017/18 area and production levels are estimated at 1.8 million HA and 1.55 MMT based on government statistics.

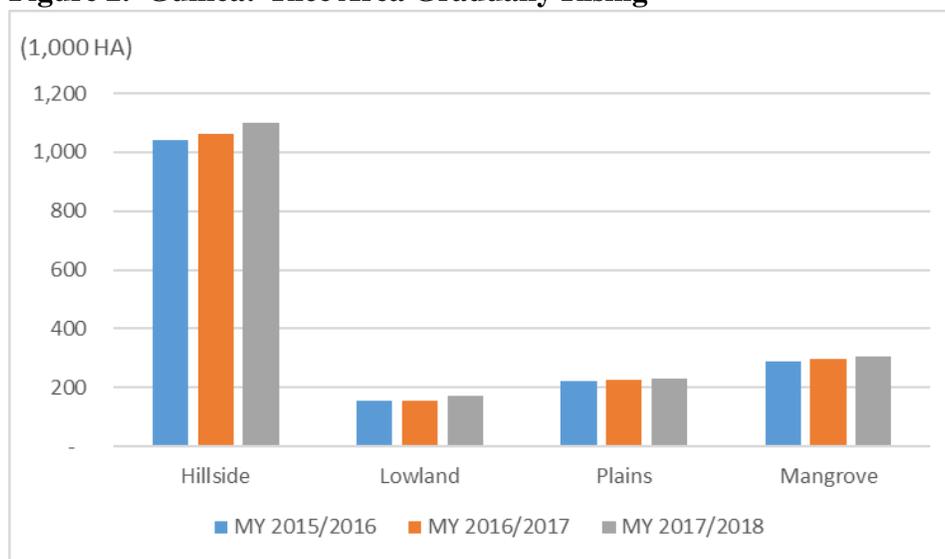
Guinea has four rice production ecosystems: lowland, alluvial plains, hillside (grown on or at the base of a hill), and mangrove. According to Government of Guinea (GoG) statistics, in MY 2017/18 hillside rice constituted 65 percent of total rice area, with yields ranging from 1 to 1.5 MT per HA. Mangrove, lowland, and alluvial plains rice constitute 16, 10, and 9 percent of total rice area, with yields ranging from approximately 0.5 to 4 MT per HA. Rice is grown in four zones (or regions) in Guinea: Maritime Guinea, Upper Guinea, Mid Guinea, and Forest Guinea.

**Figure 1. Guinea: Rice Ecosystems Divided by Zone for MY 2017/18**



Source: National Statistic Department

**Figure 2. Guinea: Rice Area Gradually Rising**



Source: National Statistic Department

Post sources stated that the farm gate price for paddy rice has not change over the past five years, varying between 2,500 to 3,000 Guinean francs (GNF) per kg. Prices reportedly can increase up to 4,000 GNF per kg during the lean period (please see Table 1). Rice competes with other crops such as potatoes, corn, and fonio.

Most rice is grown for subsistence purposes; farmers apply very little or no fertilizer (approximately only 20 to 30 percent of total area may receive fertilizer) and many do not have access to modern farm equipment (or cannot afford to pay rental costs). Most farmers use draught animals or manual labor to

prepare the fields for planting. However, farmers in more commercialized production areas, such as in Upper Guinea and in Maritime Guinea (Kindia and Boke), utilize modern farm equipment to plow the fields.

The vast majority of farms are generally small, ranging from approximately 0.5 to 1.5 HA. However, in Upper Guinea, according to contacts, a few farms plant 20 to 50 HA or more of rice per year. Male farmers and family members are usually in charge of most activities involved in rice production, while female family members might assist in tilling, seeding, weeding, and harvesting activities. Even if farmers wanted to expand rice area, finding labor is difficult since reportedly many workers prefer off-farm, higher paying jobs.

**Photo 1. Guinea: Mangrove Rice Production**



Source: FAS/ Dakar

**Photo 2. Guinea: Mangrove Rice Harvest**



Source: FAS/ Dakar

### **Fertilizer, Herbicides, and Insecticides**

Since 2012, the GoG has subsidized nitrogen, phosphorus, and potassium (NPK) fertilizer and urea; however, even though prices have remained relatively stable, contacts noted that most farmers do not use fertilizer because they do not have access to financing. Sources stated that farmers who purchase fertilizer prefer NPK 15,15,15 or NPK 17,17,17; application is reportedly 200 kg per HA for NPK and 100 kg per HA for urea. Regarding prices, in calendar year 2018, subsidized NPK or urea was 135,000 GNF per 50 kg, compared to the non-subsidized equivalent at 250,000 GNF per 50 kg. Herbicides and insecticides are generally not used by rice farmers.

### **Seeds**

The Institut de Recherche Agronomique de Guinée (IRAG) operates in the Maritime Guinea, Upper Guinea, Mid Guinea, and Forest Guinea zones, and develops breeder and foundation rice seeds. Farmer cooperatives buy foundation seed for seed multiplication; seeds are then sold to farmers. Post sources noted that farmers typically pay for seeds in kind after harvest (1.5 kg of paddy rice pays for 1 kg of seed); however, most farmers reportedly prefer to use seeds saved from the previous season.

Rice seed prices are not fixed by the government. In MY 2018/2019, foundation seeds were between 5,000 to 7,000 GNF per kg. According to sources, seed multipliers sold seeds between 4,000 GNF and 5,000 GNF per kg or 4,500 and 6,000 GNF per kg if they were treated and packed. Higher yielding varieties are generally more expensive; sometimes the government offers subsidies for certain high yielding varieties.

### **Processing and marketing**

Fifty percent of paddy rice harvested in Guinea is parboiled, while the remaining is milled into white rice. In order to create parboiled rice, paddy rice is boiled locally in 40 kg drums, although larger 90-100 kg drums sometimes are available. According to contacts, 12.5 MT of paddy rice produce 8 MT of parboiled rice. Many villages use Engelberg rice milling machines that can process between 500 to 800 kg of paddy rice per hour, although compact rice milling machines that incorporate a rubber roller are utilized and can reportedly process 1.5 MT of paddy rice per hour. Post sources noted that Guinea only has a few medium-sized rice mills, which can process 2 MT of paddy rice per hour.

Many intermediaries are involved in collecting, transporting, buying, and selling local paddy and milled (parboiled or white) rice. Small and large wholesalers sell the milled rice to second or third-tier wholesalers/distributors in other markets or major cities before it reaches an open air market or supermarket. Prices are determined by the market (there are no government-fixed prices). Retail prices range from 7,500 to 8,000 GNF per kg for parboiled or milled white rice (please see Table 1).

**Photo 3. Guinea: Preparing Parboiled Rice in a 40 kg Drum**



Source: FAS/ Dakar

**Photo 4. Guinea: Medium-sized Rice Mill**



Source: FAS/ Dakar

## Consumption

MY 2019/20 and MY 2018/19 consumption is estimated at 2.35 and 2.2 MMT based on population growth and a growing preference for rice over other locally grown foods such as fonio, yams, potatoes, and corn. Per capita rice consumption is estimated at 120 kg per year. Many Guinean consumers prefer parboiled rice because of its higher nutritional content, although some zones such as Forest Guinea prefer white rice. According to contacts, in general, consumers in Conakry purchase imported rice (69.8 percent from India) because it is less expensive than domestically produced rice. Unlike other West African consumers, Guinean consumers generally do not prefer to eat broken rice, although it is used to make bread, porridge, and couscous.

## Photo 5. Guinea: Imported and Local Rice at an Open-air Market



Source: FAS/ Dakar

## Stocks

MY 2019/20 and MY 2018/19 stocks levels are estimated at 167,000 MT. Stocks are reportedly only held by the private sector, which holds a minimal amount of stocks per year; there are no government owned stocks.

**Trade**

Post estimates MY 2019/20 and MY 2018/19 rice imports at 850,000 MT and 750,000 MT on population growth. In calendar year 2018, India had 53 percent of total export market share, followed by China and Burma, both at 27 percent. India supplies mainly parboiled rice while China and Thailand export fragrant and non-fragrant white rice. Eighty percent of imported rice enters Guinea via the Port of Conakry, while around 4,000 MT of imported rice enters through the Port of Kamsar (Boke Region). Other imported rice enters Guinea via the Port of Morovia in Liberia. Contacts noted that Liberia and Sierra Leone export rice to Guinea during the lean season.

MY 2019/20 and MY 2018/19 rice exports are estimated at 150,000 MT. Although no official data exists, contacts believe parboiled rice is exported to Senegal, The Gambia, Guinea Bissau, Sierra Leone, and Liberia. Imported broken rice may also be resold to neighboring countries such as Senegal.

Wholesalers, second-tier wholesalers, and retailers sell and distribute imported rice. Five or 50 kg bags are generally available for consumers. In 2012, the GoG reduced taxes on imported rice from 12.75 percent (the ECOWAS tariff rate) to 2.75 percent. As a result, imported rice is generally less expensive than locally milled rice.

**Table 1. Guinea: Imported Rice is Less Expensive than Local Rice in CY 2018**

(GNF)	Farm Gate Price	Wholesale Price (in Conakry)	Retail Price (in Conakry)
Imported fragrant white rice (25 percent broken)	N/A	160,000 GNF - 170,000 GNF per 25 kg	7,500 to 8,000 GNF per kg
Imported non fragrant white rice	N/A	245,000 GNF per 50 kg	4,900 GNF per kg
Imported parboiled rice (Indian rice)	N/A	275,000 GNF per 50 kg	6,000 GNF per kg
Paddy rice	2,500 to 3,000 GNF per kg (could increase to 4,000 GNF per kg)	N/A	N/A
Local parboiled rice	N/A	375,000 GNF per 50 kg	8,000 GNF per kg
Local milled white rice	N/A	7,000 GNF per kg	7,500 to 8,000 GNF per kg

Source: Government of Guinea

**Policy**

The Plan National d'Investissement Agricole et de Sécurité Alimentaire et Nutritionnelle (PNIASAN) 2018-2025 aims to increase rice yields and production to 3 MT per HA and 4.6 MMT by 2025. It hopes to achieve this goal by improving the irrigation system as well as the availability of improved rice seed varieties, modern farm equipment, and inputs. Sources believe that the government likely will continue to keep rice import duties lower than the ECOWAS rate in order to ensure less expensive rice is available on the market for price-sensitive consumers.

### **III. Senegal, Mali, and Burkina Faso**

#### **Senegal**

##### **Production**

MY 2019/20 (October to September) area and rice production levels are projected to rise to 245,000 HA and 550,000 MT assuming good weather and strong prices that may continue to incentivize farmers to plant more rice. MY 2018/19 area is estimated at 240,000 HA, up from the previous year due to seed subsidies (see policy section) that reportedly influenced farmers to continue to grow rice primarily for subsistence purposes in the Casamance (southern Senegal), as well as expectations of strong farm gate prices for rice in the Senegal River Valley (SRV) (northern Senegal) that may influence planting decisions during the upcoming dry season (March to June). However, for the same MY, contacts noted that during the rainy season (July/August to September/October) in the SRV, planted area decreased in comparison to last year due to a lack of financing and competition from other crops such as tomatoes, which reportedly are more profitable than rice. MY 2018/19 rice production is estimated at 540,000 MT on expectations of generally good weather and rainfall in the SRV and Casamance.

##### **Consumption**

MY 2019/20 and MY 2018/19 rice consumption is estimated at 2 and 1.9 MMT based on population growth.

##### **Trade**

MY 2019/20 and MY 2018/19 rice imports are estimated at 1.65 and 1.57 MMT on population growth and expectations of competitive international prices. In MY 2017/18 India (56 percent), Thailand (16 percent), Brazil (11 percent), Pakistan (8 percent), and China (5 percent) were the main suppliers. For the last few years, India has held around a 50 percent market share. Thai exports to Senegal have dropped in recent years, and this may be due to the ban on whole grain rice imports (see Policy section below).

##### **Policy**

Since 2017, Senegal has prohibited the importation of 100 percent whole grain (zero percent broken)

aromatic and non-aromatic rice to prevent competition with local rice. Official contacts noted that this import ban is still in effect.

The Government of Senegal had a policy objective to achieve self-sufficiency in rice by 2017, but this goal was not realized. The new Plan Senegal Emergent, a document that articulates Senegal's policy objectives for the next five years, likely may continue to include a self-sufficiency policy for rice. According to official contacts, the GOS has continued to subsidize inputs in the Casamance in order to try to influence farmers to grow more rice and pursue the government's goal of self-sufficiency. For FY 2018/19, farmers could choose between two purchasing methods to buy subsidized rice seed: a) pay back every 1 kg of subsidized rice seed with 1.5 kg of paddy rice or b) pay between 300 to 700 CFA francs for 1 kg of seed.

For more detailed information on the Senegalese rice market, please see the [2018 West African Rice Annual](#).

## **Mali**

### **Production**

MY 2019/20 (October to September) area and rice production levels are projected at 945,000 HA and 2 MMT assuming the rehabilitation of irrigation systems in the Office du Niger zone, a main production area, that may influence farmer planting decisions and good weather. MY 2018/19 area and production levels are estimated at 925,000 HA and 1.95 MMT based on official government data.

### **Consumption**

For MY 2019/20 and MY 2018/19, Post estimates rice consumption at 2.4 and 2.25 MMT on population growth.

### **Trade**

Post estimates MY 2019/20 and MY 2018/19 rice imports at 400,000 MT and 300,000 MT on expectations of population growth, competitive international prices, and the tax rebate (see Policy section below).

### **Policy**

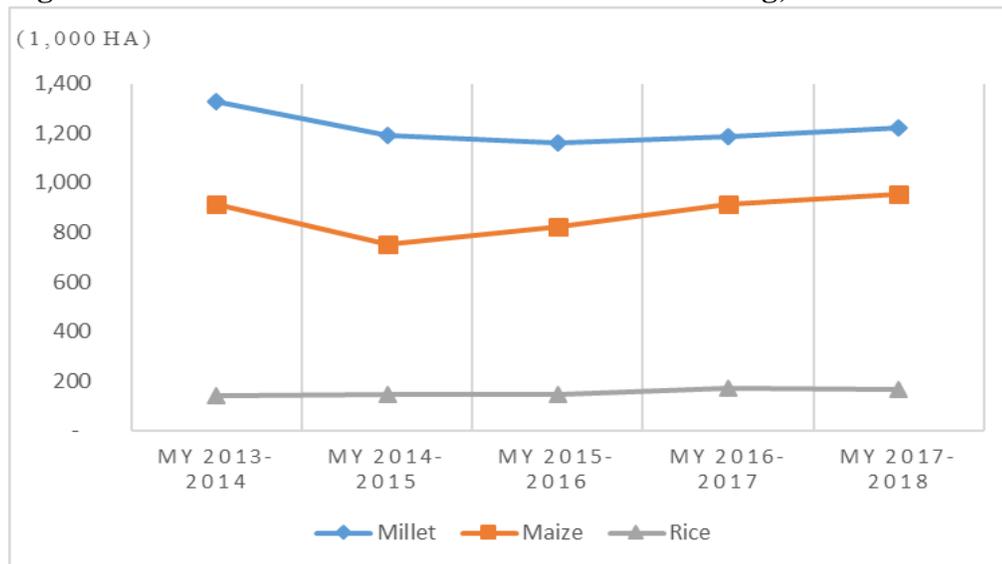
According to media reports, select importers will be approved to receive a tax rebate on imported non-fragrant 100 percent broken rice, ranging from 100,000 to 200,000 CFA francs per MT. These importers will be allegedly required to contract with intermediaries who sell imported rice at the Government of Mali's fixed retail price, which is set at 350 CFA francs per kg, a decrease of 6.6 percent compared to last year.

## **Burkina Faso**

## Production

MY 2019/20 (October to September) area and rice production levels are projected at 160,000 HA and 225,000 MT, unchanged from last year assuming the possibility of poor weather and that farmers will dedicate less area to rice, and focus on growing crops that require less water such as millet, sorghum, or corn. For the last few years, Post contacts noted that consistently low rainfall has influenced farmers to switch to other crops. MY 2018/19 area is projected at 160,000 HA based on government data as well as reports of farmers deciding to plant other cereals due to concerns of poor rainfall and drought. MY 2018/19 rice production is estimated at 225,000 MT due to a lack of rainfall during the vegetative and reproductive stage that allegedly caused low yields.

**Figure 3. Burkina Faso: Millet and Corn Area Growing; Rice Area Steady**



Source: Government of Burkina Faso data

## Consumption

MY 2019/20 and 2018/19 rice consumption is estimated at 825,000 and 780,000 MT on population growth. Annual per capita consumption is estimated at 36 kg per person.

## Trade

MY 2019/20 and 2018/19 rice imports are forecast at 600,000 MT and 550,000 MT on population growth and expectations of competitive international prices. In MY 2017/2018, Thailand and India were the main rice suppliers to Burkina Faso with 38 and 35 percent of market share, respectively.

## Policy

The Burkina Faso [National Rice Development Strategy](#) (SNDR) phase I (2008-2015) and phase II (2016-2018) aimed to increase rice production by improving access to certified seeds, water, modern farm equipment, and fertilizer. It is likely that another strategy will be implemented to support rice

production, as Burkina Faso has previously noted it has a goal to be self-sufficient in rice.

**IV. Production, Supply, and Distribution Statistics in 1,000 HA, 1,000 MT, and MT/HA**

Rice, Milled Market Begin Year Senegal	2017/2018		2018/2019		2019/2020	
	Oct 2017		Oct 2018		Oct 2019	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post

Area Harvested	306	235	280	240	0	245
Beginning Stocks	234	234	234	209	0	224
Milled Production	685	525	646	540	0	550
Rough Production	1007	772	950	794	0	809
Milling Rate (.9999)	6800	6800	6800	6800	0	6800
MY Imports	1150	1450	1250	1575	0	1650
TY Imports	1100	1400	1250	1650	0	1650
TY Imp. from U.S.	0	0	0	0	0	0
Total Supply	2069	2209	2130	2324	0	2424
MY Exports	10	200	10	200	0	200
TY Exports	10	200	10	200	0	200
Consumption and Residual	1825	1800	1875	1900	0	2000
Ending Stocks	234	209	245	224	0	224
Total Distribution	2069	2209	2130	2324	0	2424
Yield (Rough)	3.2908	3.2851	3.3929	3.3083	0	3.302

Rice, Milled Market Begin Year	2017/2018		2018/2019		2019/2020	
	Oct 2017		Oct 2018		Oct 2019	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Burkina						
Area Harvested	165	165	175	160	0	160
Beginning Stocks	47	47	39	39	0	34
Milled Production	212	212	244	225	0	225
Rough Production	326	326	375	346	0	346
Milling Rate (.9999)	6500	6500	6500	6500	0	6500
MY Imports	520	520	580	550	0	600
TY Imports	550	550	600	600	0	600
TY Imp. from U.S.	0	0	0	0	0	0
Total Supply	779	779	863	814	0	859
MY Exports	0	0	0	0	0	0
TY Exports	0	0	0	0	0	0
Consumption and Residual	740	740	810	780	0	825
Ending Stocks	39	39	53	34	0	34
Total Distribution	779	779	863	814	0	859
Yield (Rough)	1.9758	1.9758	2.1429	2.1625	0	2.1625

Rice, Milled Market Begin Year	2017/2018		2018/2019		2019/2020	
	Oct 2017		Oct 2018		Oct 2019	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Mali						
Area Harvested	900	900	900	925	0	945
Beginning Stocks	185	185	214	214	0	214
Milled Production	1899	1899	1885	1950	0	2000
Rough Production	2922	2922	2900	3000	0	3077

<b>Milling Rate (.9999)</b>	6500	6500	6500	6500	0	6500
<b>MY Imports</b>	230	230	300	300	0	400
<b>TY Imports</b>	250	250	300	300	0	400
<b>TY Imp. from U.S.</b>	0	0	0	0	0	0
<b>Total Supply</b>	2314	2314	2399	2464	0	2614
<b>MY Exports</b>	0	0	0	0	0	0
<b>TY Exports</b>	0	0	0	0	0	0
<b>Consumption and Residual</b>	2100	2100	2200	2250	0	2400
<b>Ending Stocks</b>	214	214	199	214	0	214
<b>Total Distribution</b>	2314	2314	2399	2464	0	2614
<b>Yield (Rough)</b>	3.2467	3.2467	3.2222	3.2432	0	3.2561

<b>Rice, Milled</b>	<b>2017/2018</b>		<b>2018/2019</b>		<b>2019/2020</b>	
	<b>Oct 2017</b>		<b>Oct 2018</b>		<b>Oct 2019</b>	
	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>
<b>Market Begin Year</b>						
<b>Guinea</b>						
<b>Area Harvested</b>	1100	1805	1100	1810	0	1815
<b>Beginning Stocks</b>	117	117	138	167	0	167
<b>Milled Production</b>	1451	1550	1500	1600	0	1650
<b>Rough Production</b>	2198	2348	2273	2424	0	2500
<b>Milling Rate (.9999)</b>	6600	6600	6600	6600	0	6600
<b>MY Imports</b>	700	700	850	750	0	850
<b>TY Imports</b>	865	865	850	700	0	850
<b>TY Imp. from U.S.</b>	5	5	0	5	0	5
<b>Total Supply</b>	2268	2367	2488	2517	0	2667
<b>MY Exports</b>	80	150	80	150	0	150
<b>TY Exports</b>	80	150	80	150	0	150
<b>Consumption and Residual</b>	2050	2050	2200	2200	0	2350
<b>Ending Stocks</b>	138	167	208	167	0	167
<b>Total Distribution</b>	2268	2367	2488	2517	0	2667
<b>Yield (Rough)</b>	1.9982	1.3008	2.0664	1.3392	0	1.3774

(1000 HA) ,(1000 MT) ,(MT/HA)