West African food security strategies: Rice policies at the crossroads.

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Rice: a key commodity for food “securisation” in West Africa

- The “food crisis” led to the revitalization of public funded programs for rice production increase.
- Rice represents 25% of total food import value (2000-2006 average).
- Policy options: imports substitutions versus rice trade liberalization.
Justification and hypothesis

The case for rice policy analysis in West Africa:

- Two decades of alternative public and market led *policy* provide a relevant basis to compare their relative efficiency in improving food security.
- *Diverse policy and rice sector* configurations encountered in the sub-region.

Hypothesis: both public and market led policies’ outcomes have been mitigated because they have neglected the importance of *marketing operations* for achieving a sustainable food security.
Imports share of rice market and policies sequence

Import share of total rice availability

- Pre 70's food crisis
- Food crisis
- Public investment in rice prod.
- Liberalization

Sources:
computation based on USDA-FAS data
A diet transition rather than a food crisis

Kg/per year/per capita

West Africa without Nigeria

Production
Consumption

Nigeria
Production
Consumption

Sources: computation based on USDA-FAS data and FAO data
A diet transition accelerated by low rice price on the world market

Sources:
USDA-FAS data
IRRI rice database
An heterogeneous and contrasted situation across the sub region

Per capita annual consumption (kg)

Average for 2000-2007

Import share in total rice availability (%)
Discrepancies between trade policy options and domestic rice production trends

Kg per capita per year

Years


Sources: computation based on USDA-FAS data and FAO data
Do only prices matter? Consumers’ decisions making

West African Consumers justifications for purchasing imported rice

Percentage of responses

<table>
<thead>
<tr>
<th>Source</th>
<th>Price</th>
<th>Other organoleptic properties</th>
<th>Nutritious properties</th>
<th>Taste</th>
<th>Cooking easiness</th>
<th>Swelling capacity</th>
<th>Cleanliness and appearance</th>
<th>Availability</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>COTE D'IVOIRE</td>
<td>Import rice price &lt; local rice price</td>
<td>10%</td>
<td>90%</td>
<td>80%</td>
<td>40%</td>
<td>60%</td>
<td>30%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>NIGERIA</td>
<td>Import rice price &gt; local rice price</td>
<td>0%</td>
<td>10%</td>
<td>20%</td>
<td>50%</td>
<td>50%</td>
<td>10%</td>
<td>10%</td>
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</tbody>
</table>

Sources: WARDA- Africa Rice Centre, 2001 and 2003
A rice domestic rice economy at the margin of major consumers centre

Ghana rice market spatial configuration based on estimated local and imported rice flows

Sources: IRAM, 2007
Enhancing food security through domestic rice marketing system building

- Public and market led policy show contrasted outcomes in terms of domestic rice production growth.
- The competitiveness of the domestic rice production is not solely determined by price and also relies on the marketability of the local rice.
- A sustainable strategy for increasing domestic rice production should also take into account West African “success stories” in local rice marketability enhancement.
Thank you for your attention
A rice deficit growth linked to changes in rice consumption level

**Consumption growth**

- Nigeria
- Burkina Faso
- Togo
- Ghana
- Niger
- Mali
- Senegal
- Guinea
- Côte d'Ivoire

**Rice deficit growth**