

Coalition for African Rice Development: Progress of 2008 – 2013 and Outlook for 2013 – 2018

5th CARD General Meeting
on 6 February 2013, Dakar, Senegal
CARD Secretariat



CARD

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RICE DEVELOPMENT

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1. Intro - CARD Initiative

2. Progress 2008 -2013

- (1) NRDS Development and Implementation
- (2) Capacity Development of Rice Sector
- (3) Alignment with CAADP
- (4) Creation of Enable Environment

3. How we evaluate CARD progress?

4. Outlook for 2013-2018



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1. INTRO - CARD INITIATIVE



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1. Intro - CARD Initiative - What is CARD?

CARD

- was established in 2008 at TICAD IV by NEPAD, AGRA and JICA
- aims at doubling the rice production in Sub-Sahara Africa by 2018
→ Overall Goal
- is a consultative group of bilateral and multilateral donors and African and international institutions
- fully respects African ownership and leadership
 - Alignment to CAADP
 - Participation of African Institutions, AfricaRice, FARA, AfDB



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1. Intro - CARD Initiative - What is CARD?

CARD also

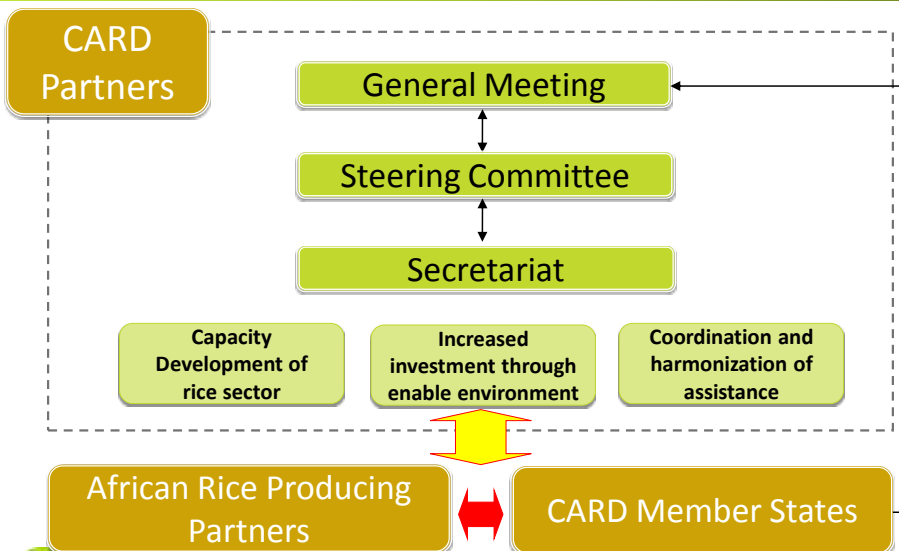
- work through following pillars....
 - Capacity Development of Rice Sector
 - Better Coordination among Relevant Stakeholders
 - Increased Investment through creation of enable environment (both public and private)

- takes the following approached.....
 - **Different AEZs** (Rain-fed upland, Rain-fed lowland, Irrigation)
 - **South-South Cooperation** (full utilization of available resources/ experiences)
 - Various aspects of **Value-Chain** (comprehensively address issues/gaps along rice value-chain from R&D, inputs, production to processing and marketing)
 - **No Funding** (CARD provides only opportunities for capacity building and coordination)
 - **Needs-based approach** (CARD's approach and strategy in its member states differs from one country to another, depending on the context, needs and government priority; No "one-size-fits-all", Flexibility)



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1. Intro - CARD Initiative - What is CARD?



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2. Progress so far 2008 – 2013

- (1) NRDS Development and Implementation
- (2) Capacity Development of Rice Sector
- (3) Alignment to other initiatives
- (4) Creation of Enable Environment



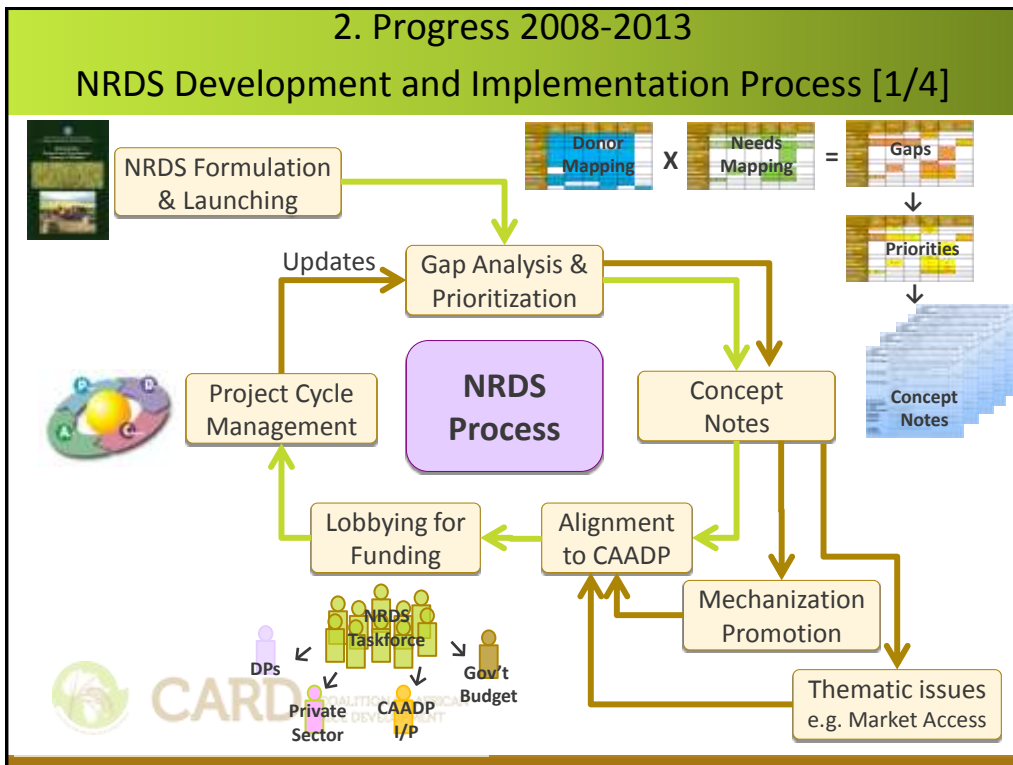
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2. PROGRESS 2008 - 2013

(1) NRDS DEVELOPMENT AND IMPLEMENTATION



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2. Progress 2008-2013

NRDS Development Status [2/4]

G1 Country	Formulation	Prioritisation - WW1	Concept Notes - WW2	G2 Country	Formulation	Prioritisation - WW1	Concept Notes - WW2
Cameroon	→	→	→	Benin	→	→	→
Ghana	→	→	→	Burkina Faso	→	→	→
Guinea	→	→	→	Côte D'Ivoire	→	→	
Kenya	→	→	→	CAR	→	→	
Madagascar	→	→	→	DR Congo			
Mali	→	→	→	Ethiopia	→	→	→
Mozambique	→	→	→	The Gambia			
Nigeria	→	→	→	Liberia	→	→	→
Senegal	→	→	→	Rwanda	→	→	→
Sierra Leone	→	→	→	Togo	→	→	→
Tanzania	→	→	→	Zambia	→	→	→
Uganda	→	→	→				

2. Progress 2008-2013 Prioritisation 21/23 countries [3/4]

	Policy / Institutional	Infrastructure	Human resource capacity	Provision / support	Information / knowledge
Seed					
Fertilizer					
Irrigation / water management					
On-farm technology dissemination (R&E)					
Mechanization					
Quality improvement					
Access to market					
Access to credit					
Overall policy tools					

2. Progress 2008-2013 NRDS Concept Notes Operationalization (examples) [4/4]

Country	Project/ Programme	Source	Amount (\$)
Cameroon	Upland Rice Development	JICA	\$3.8m [2011-2014]
Cameroon	Support the acquisition of seed and fertilizer in the rice sector	Government	\$1 m [2012]
Cameroon	Irrigation development	IFAD, WB & Korea	(t.b.c.) [Pipeline]
Madagascar	Capacity Development of Seed Growers in three regions	Madagascar-Irrigation and Watershed Management Project – PHRD/ WB	\$15m (in Total)
Madagascar	Applied research in the seed production		
Madagascar	Capacity Development of the laboratories for Soil science and Seed R&D		
Ghana	Human resource development for rice seed production and distribution	METASIP (*) / CAADP	(t.b.c.)
Ghana	Infrastructure development to improve rice seed quality	METASIP (*) / CAADP	(t.b.c.)
Senegal	14 new projects in pipeline – irrigation development, value chain development and others	Various – IFAD, JICA WB, AFD, MCA, USAID and others	(t.b.c.) [Pipeline]
Uganda	Capacity development of research institutes and service providers and other value chain actors	JICA	\$11m [2011-2016]

(*) METASIP: Medium Term Agriculture Sector Investment Plan

2. Progress 2008-2013

(1) NRDS Development and Implementation

<Progress Summary >

- Development of shared Development Strategies (NRDS) - 21 out of 23
- Harmonized interventions under the shared view
- Capacity Development of stakeholders in situation analysis, needs assessment, gap analysis, planning and prioritization
- Actual investment started in the form of operationalization of some concept notes



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2. PROGRESS 2008 -2013

(2) CAPACITY DEVELOPMENT OF RICE SECTOR



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2. Progress 2008-2013 (2) Capacity Development in Rice Sector

South-South Cooperation

What African countries can learn from Asia...

Seed	Policy / Institution	Infrastructure	Human Resource	Provision / Support	Info / Knowledge
Seed	Seed policy Seed law / standard Seed multiplication / delivery mechanisms	Breeding facilities Multiplication facilities Distribution facilities	Research staff (breeder) Community (if CIV) Technicians (multiplication) Distributors (public) Implementation of quality standard (public)	Free distribution / subsidies by the public sector	Research results on breeding (new varieties etc)
Fertilizer	Fertilizer policy Fertilizer law / standard Fertilizer delivery mechanisms	Production facilities Distribution facilities	Implementation of quality standard (public)	Free distribution / subsidies by the public sector	Research results on fertilizer use (application rate etc)
Irrigation / water mgt.	Policy on water use Laws and regulations Groups (water user association)	Full irrigation facilities Lowland rain-fed facilities	Farmers (on-farm water management) WUA (collective resource management)	Non-regularly budgeted technical services	Research results on on-farm / community resource management
Tech. dissemination	Research and extension policy Groups (farmer association)	Facilities for research and extension	Researchers / technicians Extension staff Farmer leaders Farmers / farmer groups	Non-regularly budgeted technical services	Research results on on-farm technology package
Mechanization	Mechanization policy	Factories / workshops	Artisans for manufacturing / maintenance Operators	Provision of machineries	Research results on mechanization
Quality improvement	Policy for quality improvement Quality standard	Quality processing / packaging Effective storage	Operators of processing packaging Operators of storage Staff for quality inspection		Research results on quality improvement technologies
Access to market	Trade policy (for imports, export/inter-trade) Producer groups (farmers, processors, traders etc)	Storage / road Access for traders, consumers	Farmer groups Processors Traders		Research results on trades
Access to credit			Lenders Borrowers (individual / group)	Provision of financial capital for credit schemes	Research results on credit issues (e.g. credit-worthiness of the each stakeholder on value chain)
Overall policy	National strategies Regional policies Research policies				Research results on overall rice sector development

2. Progress 2008-2013 (2) Capacity Development in Rice Sector

Institutions

Human resources

Stock-taking

Study tour

Seed

Quality

WUA

2. Progress 2008-2013

(2) Capacity Development in Rice Sector

Human Resources

- ## of Rice Researchers/ Experts in the variety of fields of expertise from 6 countries

Institutions

- ## of Rice Research Institutions/ Training Centres in the variety of fields of expertise from 6 countries

South-south cooperation: Stock-taking

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2. Progress 2008-2013

(2) Capacity Development in Rice Sector

Topics

- Seed multiplication / distribution (19 Sep)
- On-farm / off-farm techniques for grain quality improvement (for small-scale farmers) (19 Oct)
- Water User Association (16 Nov)

Target participants

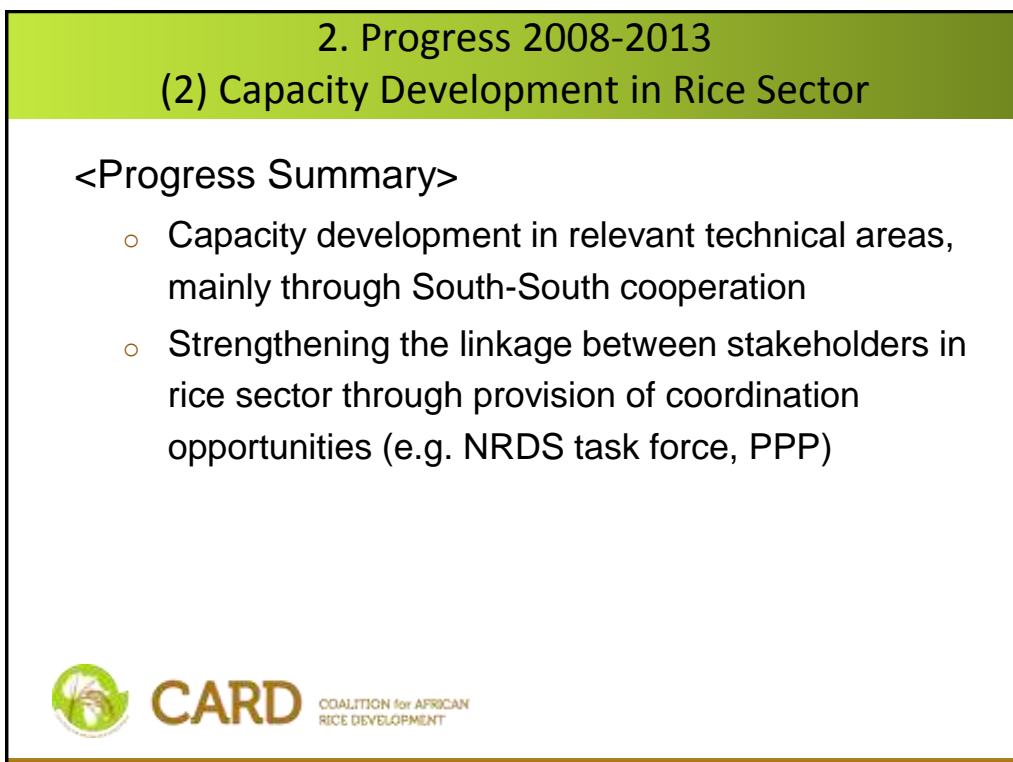
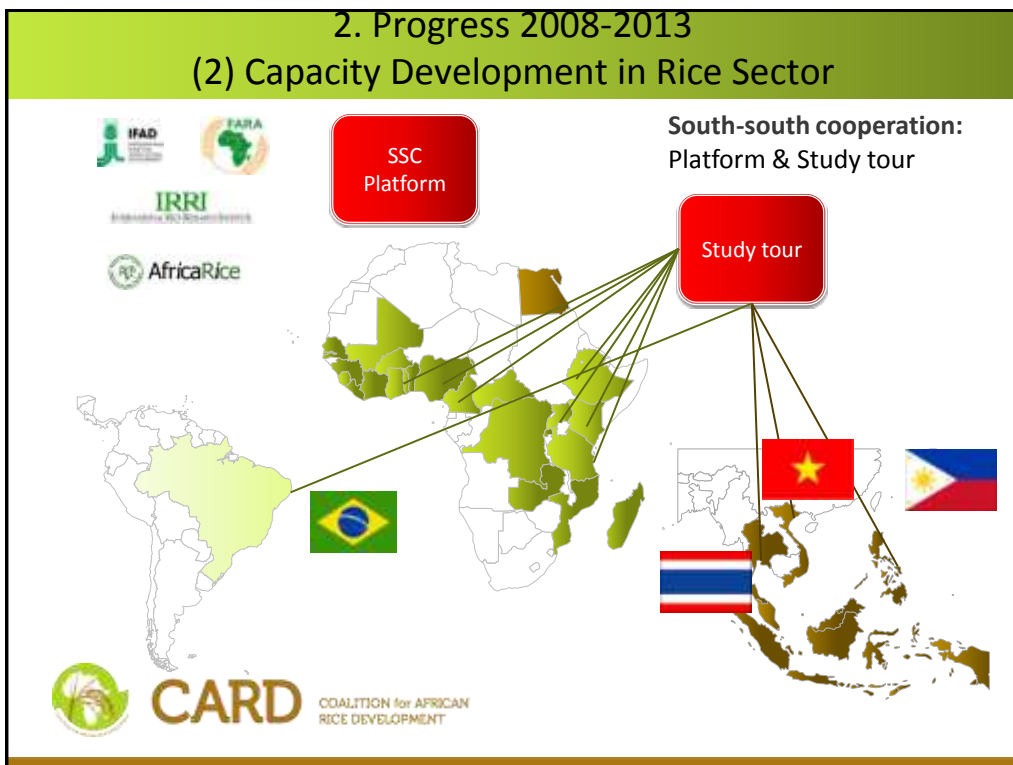
- Government organisations (staff involved in seed distribution, irrigation)
- Private-sector companies (seed seller, rice miller)
- Farmers' groups

Format

- Lectures through video conference

South-south cooperation: Video Conference Seminar

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2. PROGRESS (3) ALIGNMENT TO OTHER INITIATIVES



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2. Progress 2008-2013 (3) Alignment to other initiatives

<Progress Summary>

- Alignment to overarching initiatives (e.g. CAADP)
- Expected synergy with other initiatives
- Increased recognition of CARD in both national and regional level
- Strengthened partnership with development partners and South-South cooperation countries



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2. Progress 2008-2013


(3) Alignment to other initiatives (CAADP)

At Regional Level

NEPAD-AU as one of three key founders of the Coalition - Jointly with AGRA and JICA at TICAD IV (Japan, May '08)

Key African development partners as the Steering Committee members - NEPAD-AU, AGRA, AfricaRice, FARA (Pillar IV)

Gained recognition for the contribution in the implementation - [A side event at 8th CAADP Partnership Platform](#) (Kenya, May '12): *Communique Annex 2*

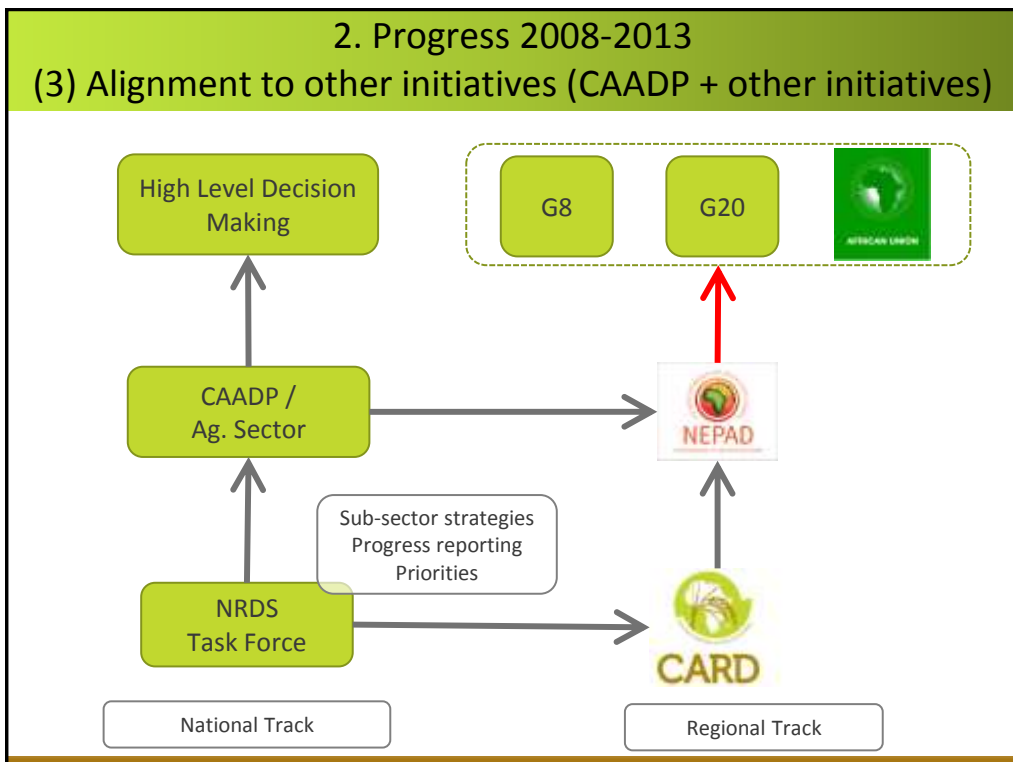


At Country Level

Integration of the result of NRDS implementation to CAADP - Matching priority interventions into CAADP/ Providing project concept notes to CAADP Country Team (Ghana, etc), same focal point (e.g. Guinea, Madagascar)

Integration of NRDS into CAADP Investment Plan - NRDS as 'Rice Chapter' (e.g. Ghana – METASIP, Sierra Leone – SCP)

CARD-CARD F/Ps Dialogue – a 3 yrs Training and Dialogue in Japan proposed by JICA




2. Progress 2008-2013

(3) Alignment to other initiatives (CAADP + other initiatives)

CAADP

CAADP

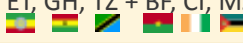
- At county level-
- At regional level – NEPAD Secretariat, 8th CAADP PP Communique Annex 2



G8 New Alliance

G8

- [The Fact Sheet](#), the Camp David Summit (May 2012) A 'Technology Platform'
- ET, GH, TZ + BF, CI, MZ




Where we are

G20

G20


- Agricultural Ministerial Declaration' [Action Plan on Food Price Volatility & Agriculture](#)' (June 2011)




Grow Africa/ WEF

growafrica

- Rice as a priority for investments by Gov'ts: ET, GH, TZ , BF, MZ, etc





2. Progress 2008-2013

(3) Alignment to other initiatives - Partnership (SSC, SP)



The map illustrates global partnerships for rice development. Key partners include:

- USAID** (United States Agency for International Development)
- WFP** (World Food Programme)
- afd** (Agence Française de Développement)
- BRAC** (Brazilian Rice Association)
- KOICA** (Korea International Cooperation Agency)
- Country Partnerships:** Ethiopia, Ghana, Brazil, Vietnam, Philippines, Thailand, Malaysia, and Indonesia.



2. PROGRESS
(4) CREATION OF ENABLE ENVIRONMENT
- FOR PRIVATE SECTOR -



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Progress 2008 - 2013
(4) Creation of Enable Environment

<Background>

Important roles played by private sector in the rice sector development were recognized in the previous CARD meetings

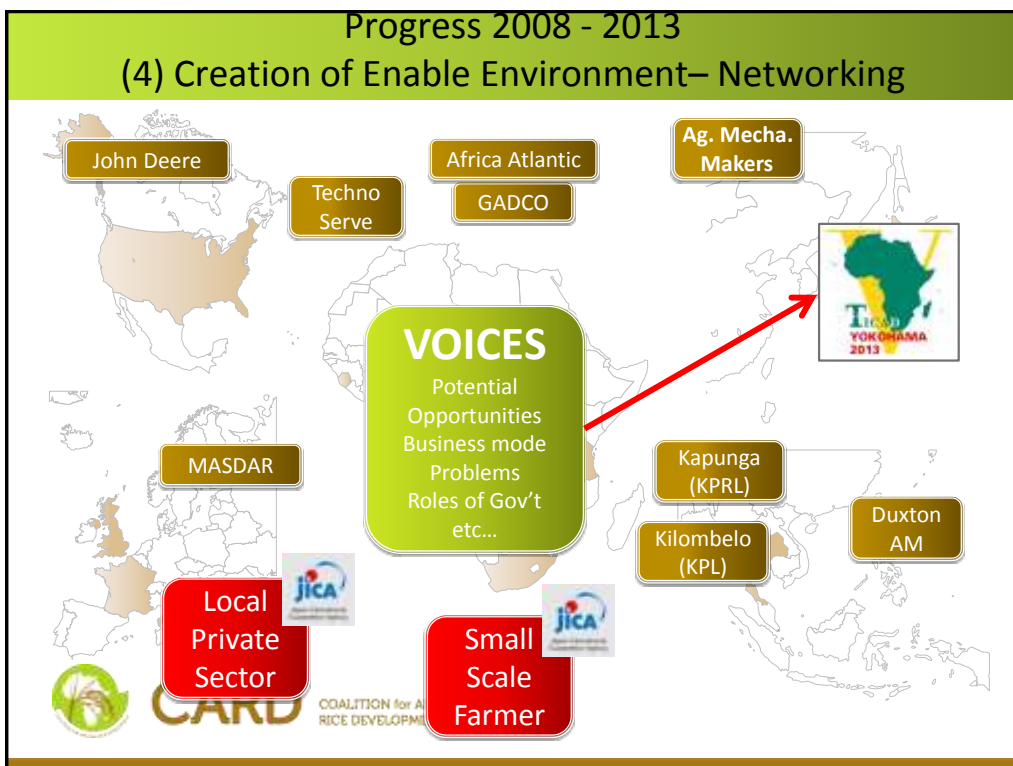
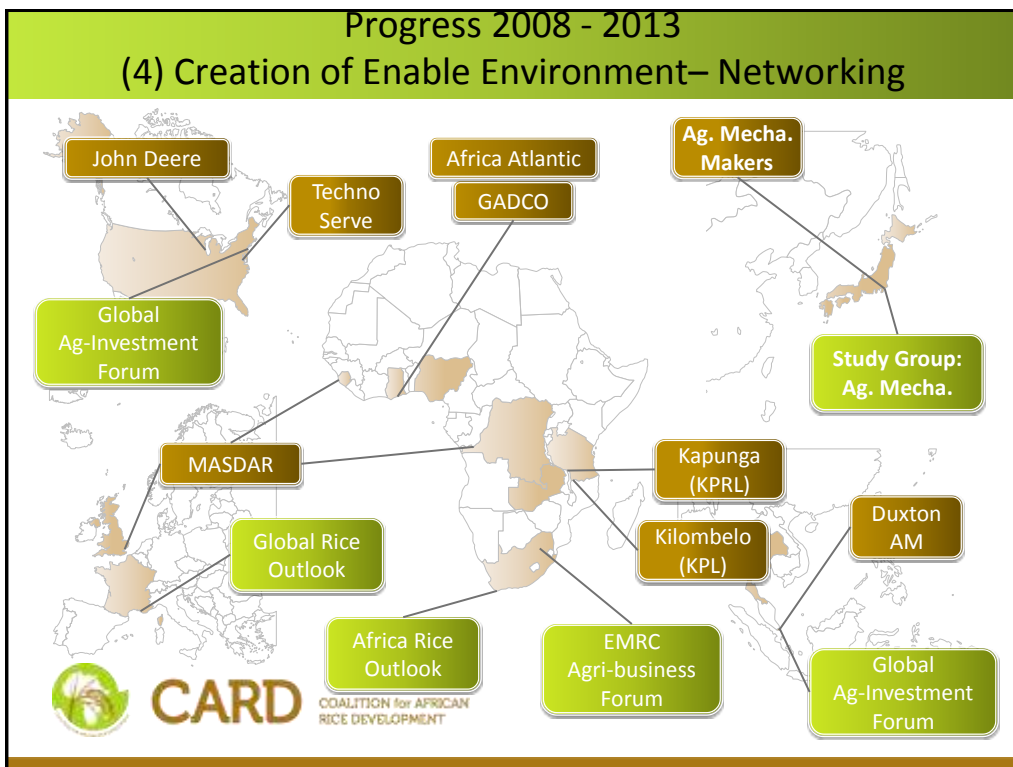
- CARD SC 5, Feb, 2011
- GM4 Nov, 2011

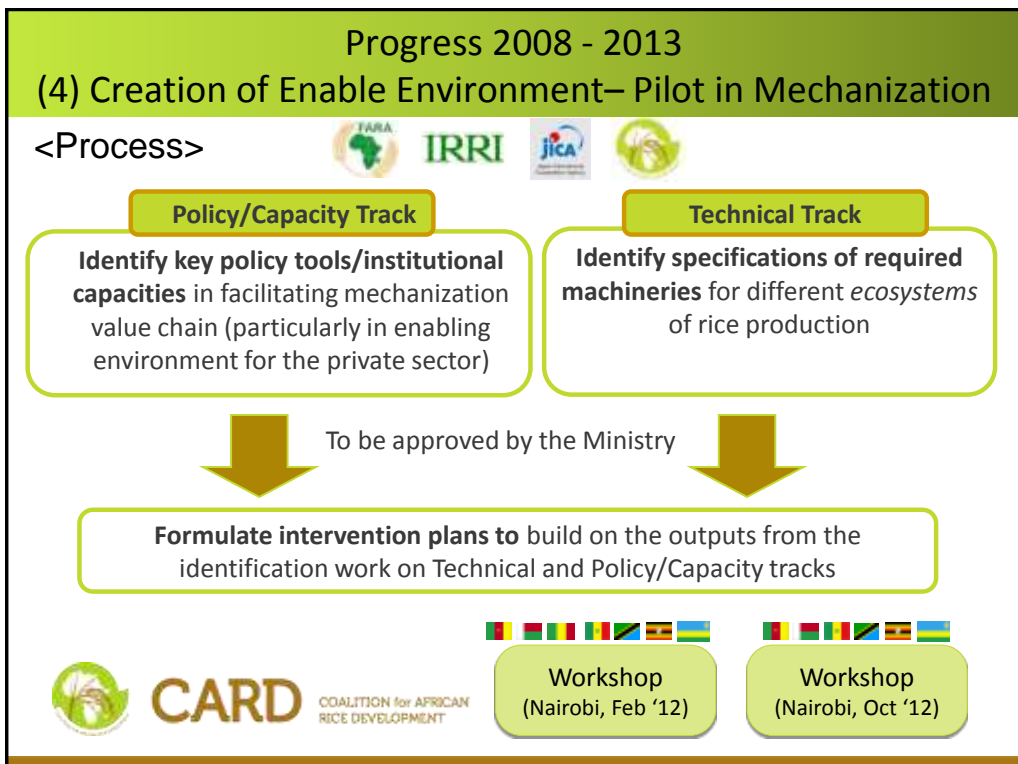
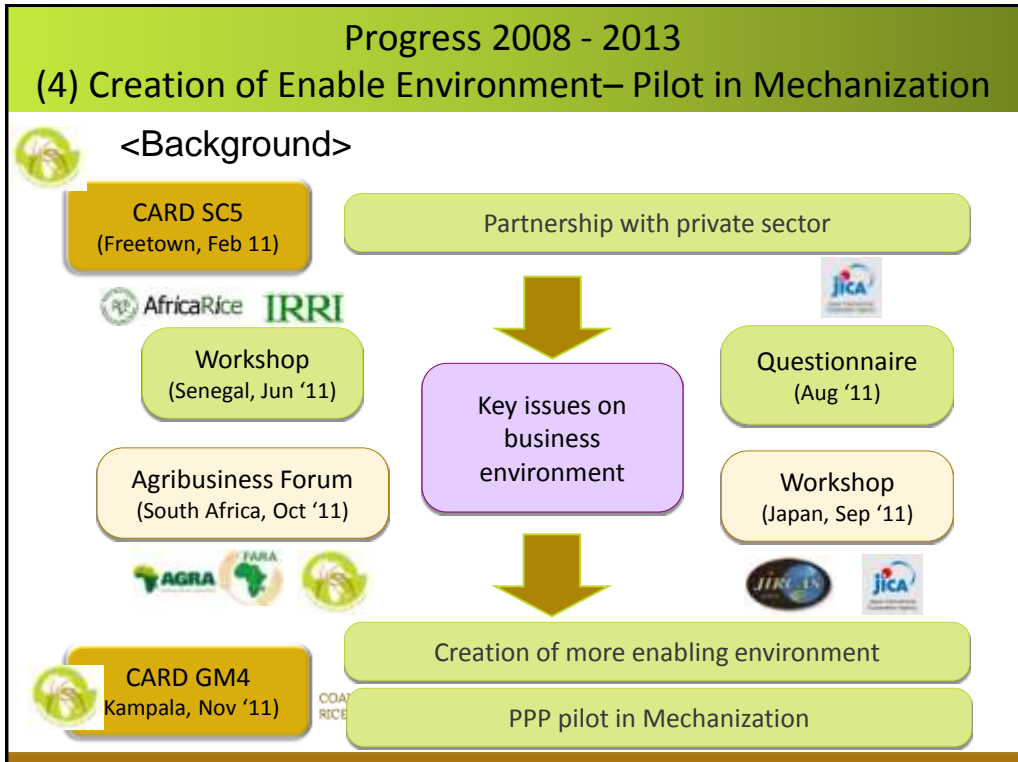


Promotion of private sector participation/ Partnership with Private sector in Rice value-chain became one of the keys for the success of CARD



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Progress 2008 - 2013

Creation of Enable Environment– Pilot in Mechanization

[Common] Policy Tools for Enabling Environment (e.g.)

For whom?	Objective (28)	Tool (33)	Action (12)
International manufacturers Domestic manufactures Machine operators	To ensure safety and quality of the machineries suit the local situation	<ul style="list-style-type: none"> • Test & evaluation, safety inspection and certification of quality of machinery (MOA) • Appropriation and standardization of machineries imported / locally produced (MOI) 	<ul style="list-style-type: none"> • Disseminate measures on test and evaluation plus certification & standards
International manufacturers Importing agents	To make imported machineries / spare parts more affordable	<ul style="list-style-type: none"> • Reduced import tariffs and VAT for machinery and spare parts that cannot be produced locally (MOF) 	<ul style="list-style-type: none"> • Lobbying at parliament level in order to approve law modification on tariff reduction for international manufacturers



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<http://www.riceforafrica.org/meetings/workshop/ag-mechanisation-ws>











Progress 2008 - 2013

Partnership with private sector – Pilot in Mechanization

Scenarios – List of machineries/ implements to be domestically manufactured/ assembled (e.g.)

Country	Timeframe	Machineries/ Implements	Current Import Tariff & VAT
	in 3 years	<ul style="list-style-type: none"> • Threshers / dehuskers / Laundresses/ Steamer/ winnowers 	<ul style="list-style-type: none"> • N/A
	in 10 years	<ul style="list-style-type: none"> • Mini harvester/ Grader 	<ul style="list-style-type: none"> • N/A
	beyond 10 years	<ul style="list-style-type: none"> • Power tillers/ Tractors/ Transplanters 	<ul style="list-style-type: none"> • N/A
	in 3 years	<ul style="list-style-type: none"> • Tractor – 22 Hp (Prototype already developed by CAMARTEC / Power tillers / Irrigation pumps 	<ul style="list-style-type: none"> • 0%
	in 10 years	<ul style="list-style-type: none"> • Power tiller accessories like plows, planters, puddlers, iron/cage wheels / Reapers /Threshing machines 	<ul style="list-style-type: none"> • 0%
	beyond 10 years	<ul style="list-style-type: none"> • (tbd) 	

(*) 4 More Countries (Madagascar, Rwanda, Senegal, Uganda) drafted the similar scenarios

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<http://www.riceforafrica.org/meetings/workshop/ag-mechanisation-ws>

Progress 2008 - 2013

Creation of Enable Environment– Pilot in Mechanization

Matching Farm Equipment to Farm Size – e.g. Tractors

10 selected Steps out of 34	2 wheel	4 wheel
1. Area covered (ha)	10.00	40.00
10. Equipment sizes available (m)	0.50	1.00
12. Draft (kN/m)	4.00	7.00
18. Purchase price of tractor (\$)	3,500.00	20,000.00
20. Purchase price of plow (\$)	150.00	2500.00
28. Total Operating Cost (\$/hr)	7.50	23.00
31. Total Fixed Cost (\$/hr)	5.98	24.58
32. Total Cost/hr (\$/hr)	11.15	47.58
33. Cost/ha (\$/ha)	44.60	47.58
Contract Rate (\$/ha)	49.06	52.34

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Progress 2008 - 2013

Partnership with private sector – Pilot in Mechanization

Power Tiller Purchase price

Plow price (USD)

Investment cost (\$/hr)

Total Cost/hr (USD)

Return to Management (%)

Total Fixed cost (USD/hr)

At Existing rates_Difference_Man-vs-Mech (USD/Ha)

At Existing Rates_Projected Difference

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Progress 2008 - 2013

Creation of Enable Environment– Some More Info

Growing large commercial investments – examples:

- About 1.5M ha in 13 SSA countries with 29 land deals, investors mainly from outside continent, 48% of 45 global rice land deals, 3% of 924 global land deals [Land Matrix DB]

- Other crops other areas (ha)
- Other crops Africa (ha)
- Rice Africa (ha)
- Rice other areas (ha)

- Ghana – 5,000ha in 5 years in Sogakope, invested by Global Agri-Development Company (GADCO), sold to local market under its own Copa brand, with \$10M by Seattle-based hedge fund Summit Capital and with \$1.5M by NY-based Acumen Fund
- Ghana – Grow Africa: The Ghana Commercial Agriculture Project (GCAP), a joint project of the Government of Ghana, World Bank and USAID

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Progress 2008 - 2013

Creation of Enable Environment– Some More Info

(continued)

- Nigeria – PPP under Agricultural Transformation Agenda (ATA) such as;
 - ❑ Badeggi Mill in Niger State privatized and managed by Deanshager Projects Ltd, expanding from 30,000 MT/year to 100,000MT/year, contracting out with 3,000 farmers;
 - ❑ \$12m Ofada/ Veetee Mill in Ogun State expanding from 30,000MT/year to potential 200,000 MT/annum;
 - ❑ Omor Mills (15,000MT/year) in Anambra owned by FG managed by Olam
- DRC – EUR400m investment by Heineken to Bralima breweries producing primus beer, contracting out rice farmers, purchasing 30,000MT, 16% of national production, with the support by EUCORD, financed by Dutch Government, as well as with the assistance by USAID and the World Bank

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2. Progress (4) Creation of Enable Environment

<Progress Summary>

- Initiated Networking with Private Sector
- Initiated Pilot PPP in mechanization
- Facilitate Public-Private dialogues (e.g. GM5, PPP mechanization process)

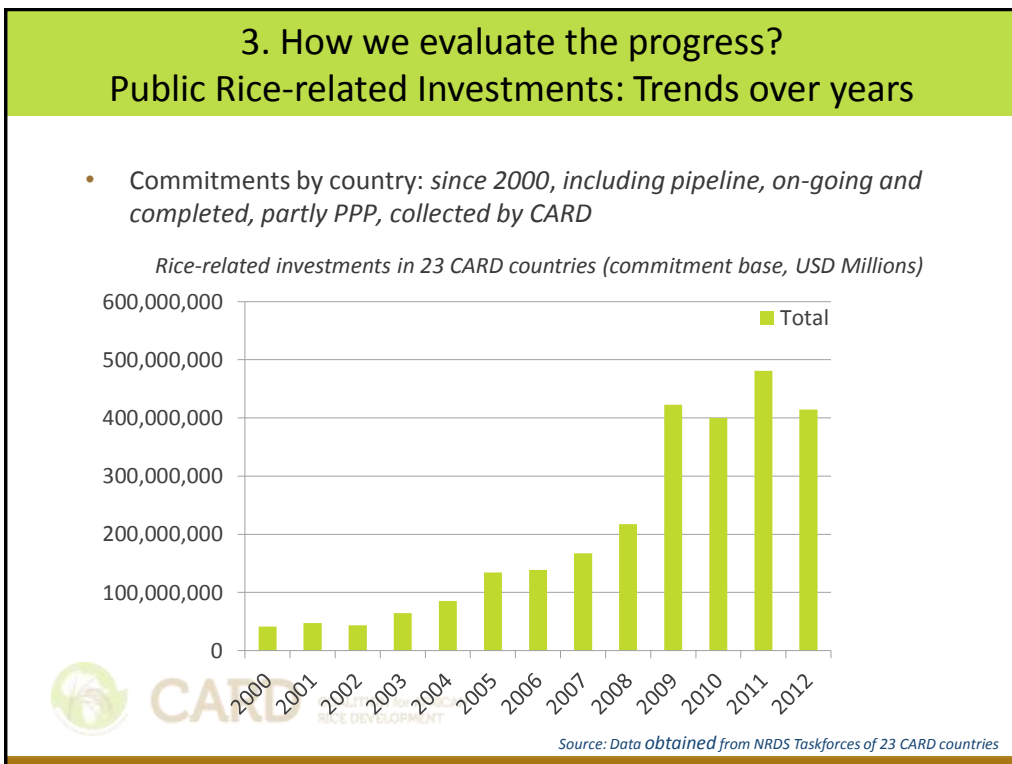
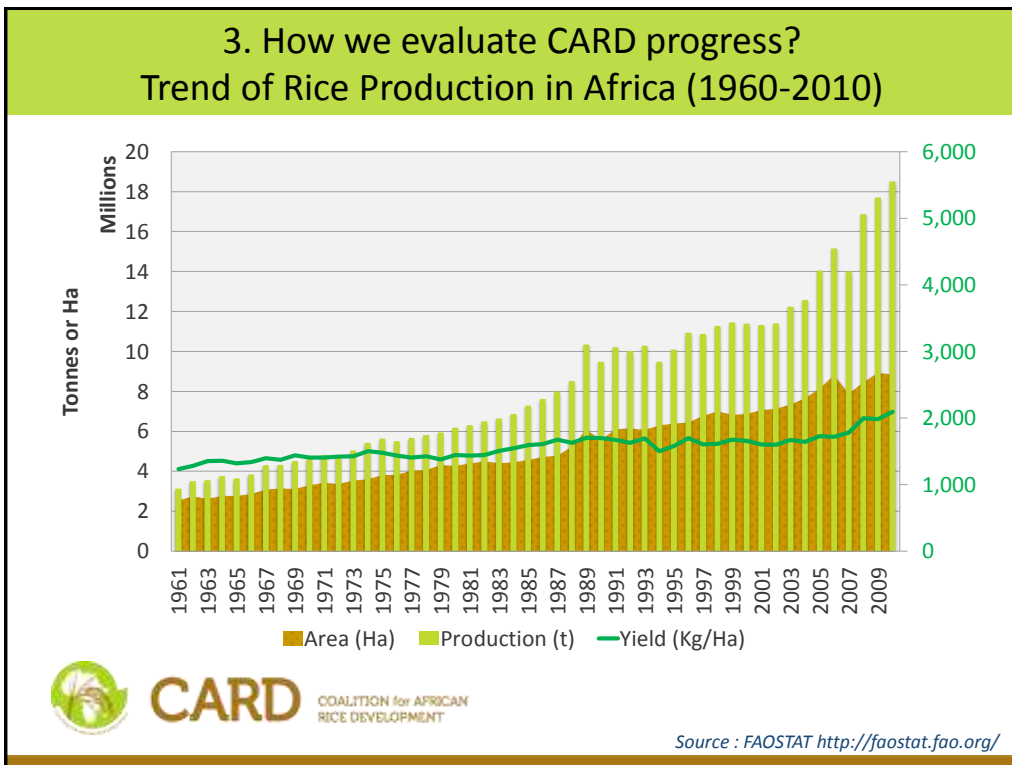


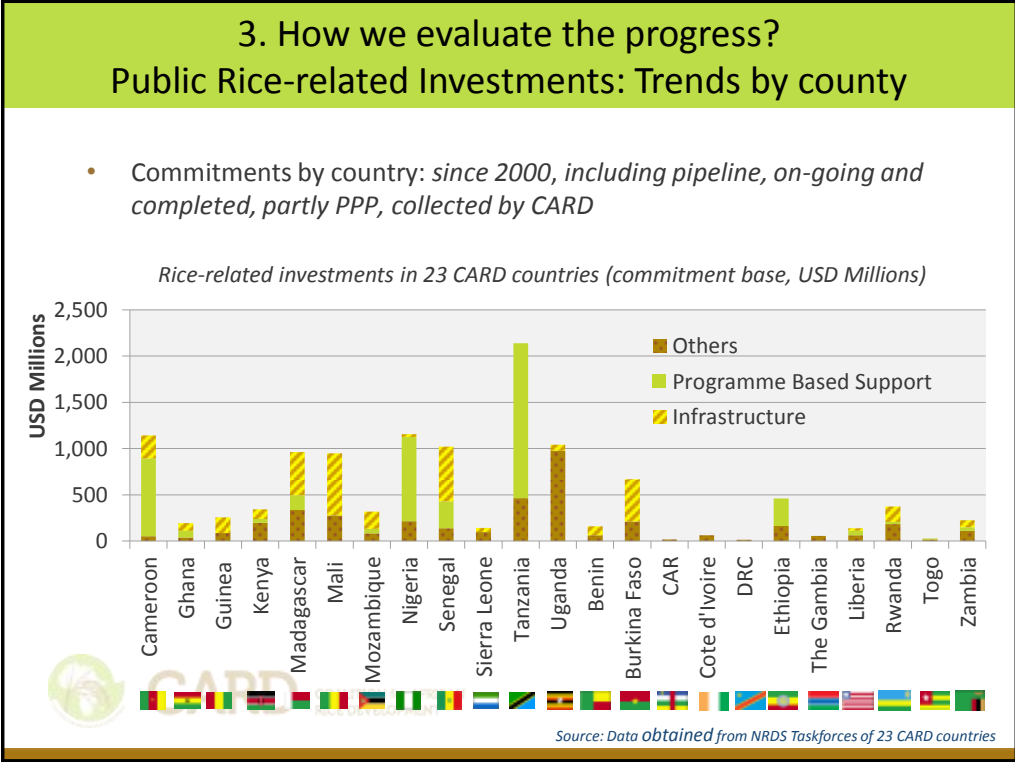
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3. HOW WE EVALUATE CARD PROGRESS?



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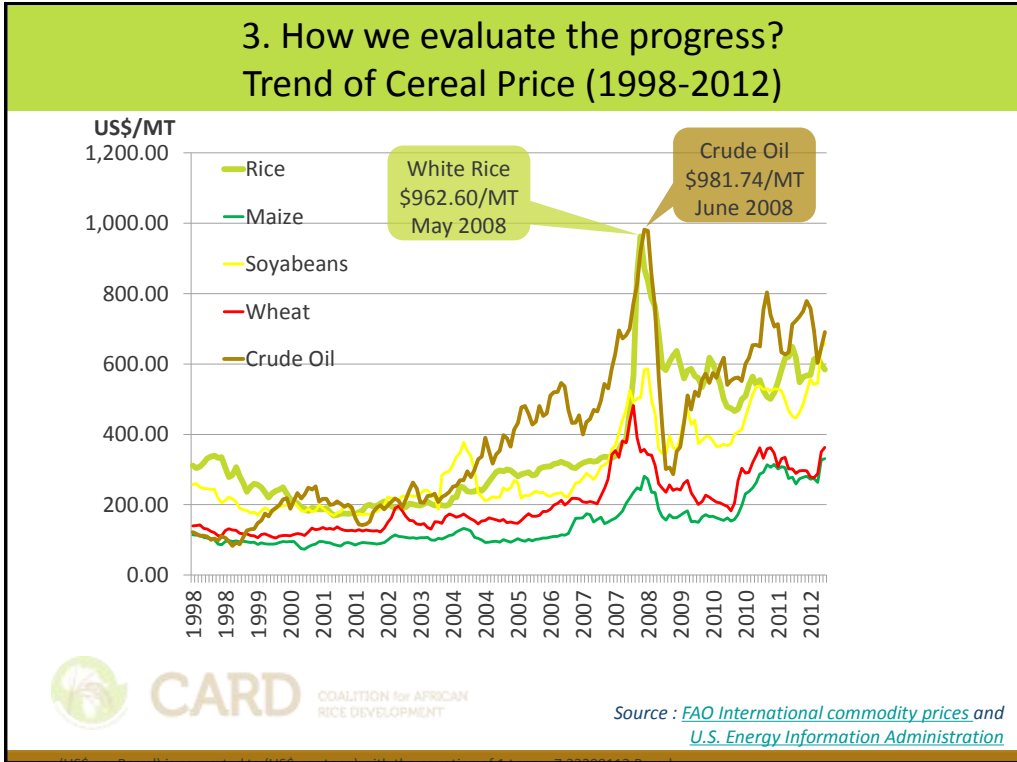


3. How we evaluate the progress?

Question;

All these development were result of the efforts under CARD initiative?





How we evaluate the progress? Trend of Rice Production in Africa

Cognizant of the complication regarding our overall goal,

(So many factors beyond our control influence the Goal which CARD tries to achieve....)

CARD should focus on making success cases (countries) to justify the CARD approach


This enable...

Comparison between success and failure, and identification of success factors/conditions

This leads to

Application of CARD approach (Commodity-based regional SWAp on Rice) to other crops (e.g. Maize)

This is the Value Addition of CARD to African Agriculture


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4. OUTLOOK FOR 2013 - 2018



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Outlook for 2013 - 2018 Way forward

(1) Accelerating NRDS implementation

- Mainstreaming of NRDS at national level
(Facilitation of policy advocacy, coordination of stakeholders,)
- Improving NRDS concept notes
(Capacity development and technical backstopping)
- Matching NRDS concept notes with financial resources
(sharing funding information, capacity development in marketing the concept notes)



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Outlook for 2013 - 2018 Way forward

(2) Creation of Enable business environment

- Facilitation of dialogues between Public and Private sector
- Provision of opportunity to share experiences and lessons
- Regional Advocacy
- Pilot in the mechanization (to be followed by attempt in other rice value-chain sub-sector; e.g. Seeds, quality control)



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Outlook for 2013 - 2018 Way forward

(3) Continuous Capacity Development

- i) Provision of opportunities
 - VC and/or other technical training
 - Exchange of experiences (study tour etc)
- ii) Information sharing
 - Sharing experiences among CARD member states
 - Rice-related initiatives/ development
- iii) Catalytic role in rice value chain integration.
 - Facilitation of PPP
 - Assist CARD countries, networking players in value-chain



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Outlook for 2013 - 2018 Way forward

(4) Continuous Harmonization and Partnership

- Alignment to CAADP
- Seeking for partnership with new initiatives (e.g. Grow Africa, New Alliance)
- Cooperation with Development Partners/ Institutions
- Cooperation with South-South cooperation countries



Outlook for 2013 - 2018 Milestones and Way Ahead

Event	Achievement
TICAD IV May 2008	<ul style="list-style-type: none"> Official launching of the Initiative 
GM 1 Oct 2008	<ul style="list-style-type: none"> Operational inception of the Secretariat Start support of the First Group (G1) countries 
GM 2 Jun 2009	<ul style="list-style-type: none"> G1 countries with the Version One of the NRDS Expansion of the Steering Committee members (8→11)  
GM 3 May 2010	<ul style="list-style-type: none"> G1 countries on situation and gap analysis Start support of the Second Group (G2) countries 
GM 4 Nov 2011	<ul style="list-style-type: none"> NRDS implementation on track Emerging actions to include the private sectors 
GM 5 Feb 2013	<ul style="list-style-type: none"> Review of 1st half of CARD and Planning for the 2nd half Promotion of private sector participation
TICAD V Jun 2013	<ul style="list-style-type: none"> Review of 1st half of CARD and Future direction for the 2nd half Gear efforts towards promotion of private sectors

Webpage

- A tool to share information and particularly assist project planners to generate effective rice-related interventions that create synergies with other key stakeholders

www.riceforafrica.org



THANK YOU

