

Discussion on monitoring (suggested outline): Proposed Indicators and Methodology

9 November 2012, Yaounde, CAMEROON
CARD Secretariat



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COALITION for AFRICAN
RICE DEVELOPMENT

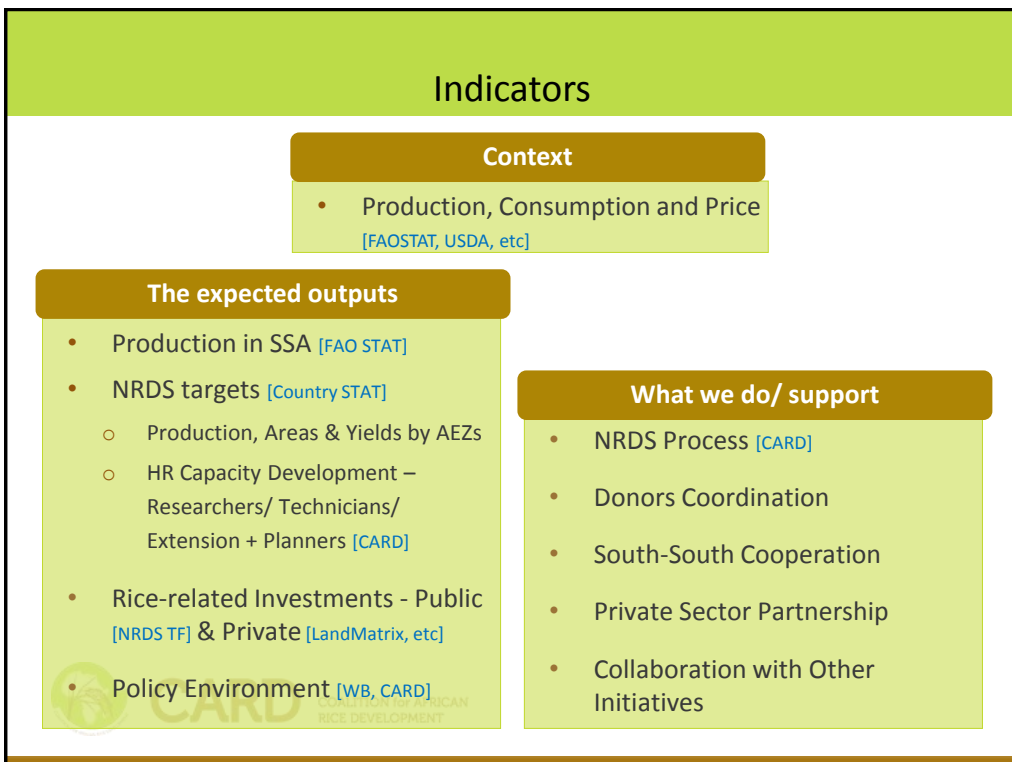
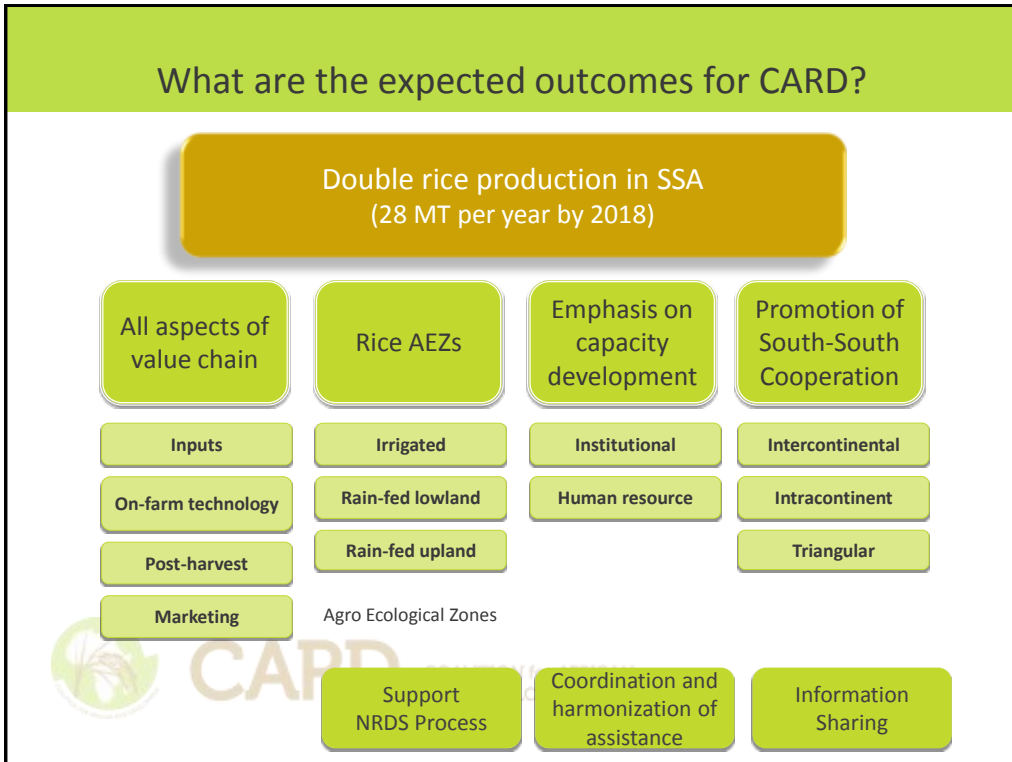
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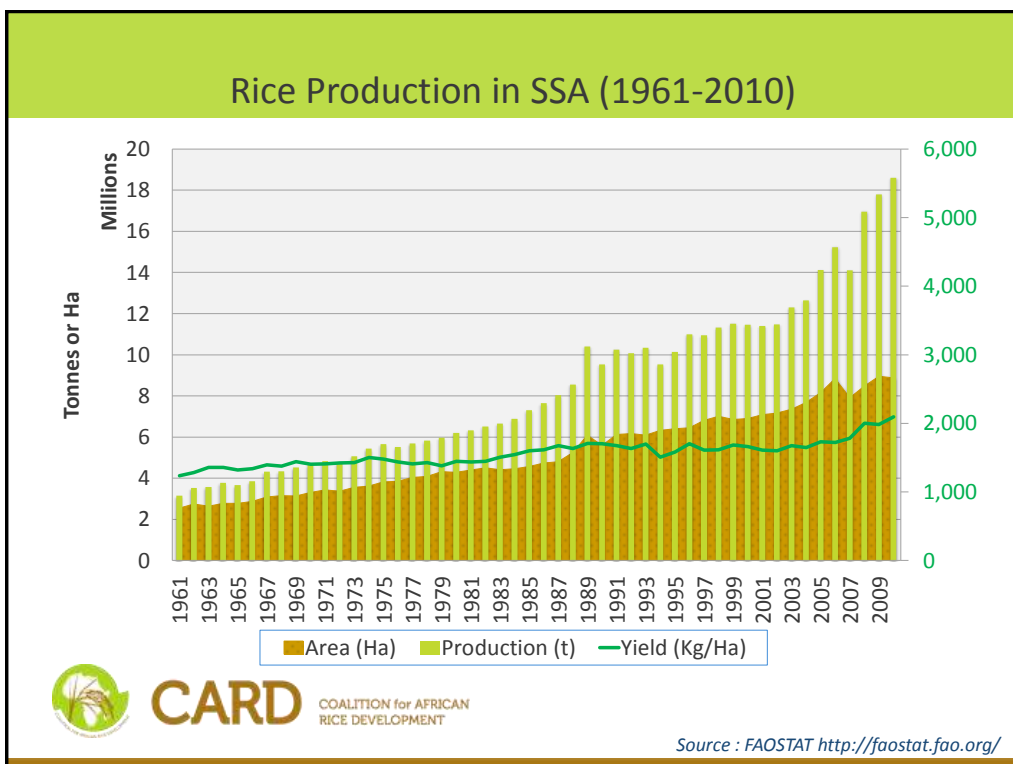
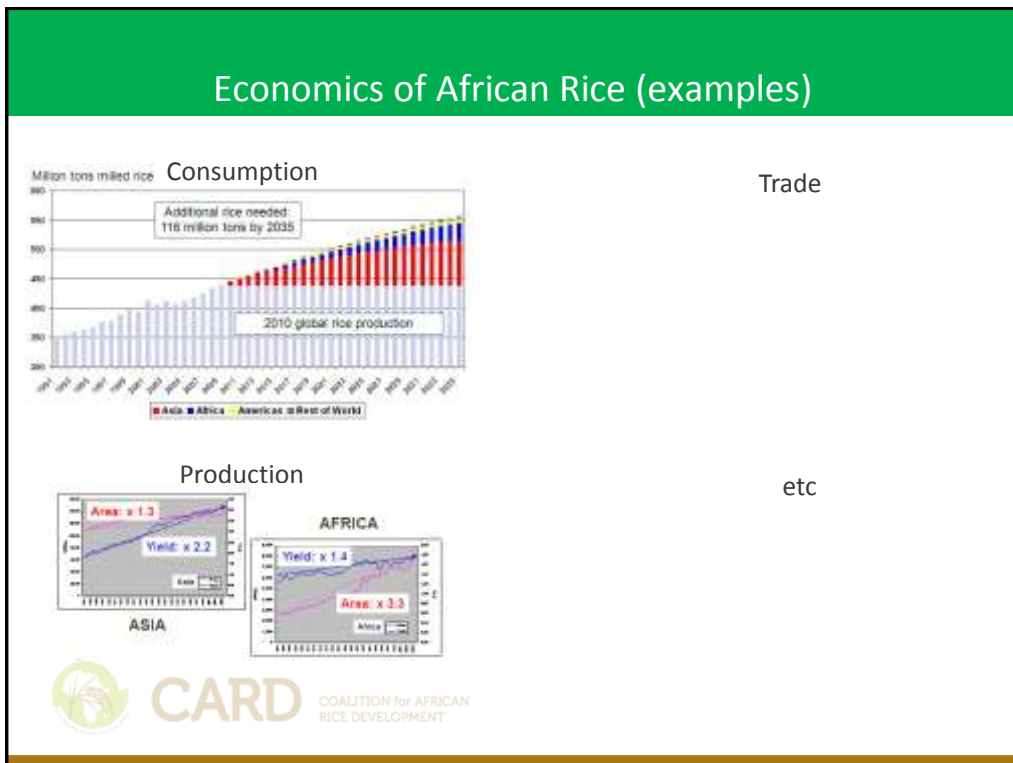
1. What are the expected outcomes for CARD? – *as a reminder*
2. Indicators – *How to monitor the progress of the initiative & rice development in Sub-Saharan Africa – Current Status, Challenges and Plan to improve*
 - 1) Production, Consumption and Price
 - 2) Rice-related Investments, Capacity Development, Policy Environment
 - 3) NRDS Process, Donors Coordination, South-South Cooperation, Private Sector Partnership, Collaboration with Other Initiatives such as CAADP, G8 New Alliance, G20, Grow Africa
3. Way Ahead

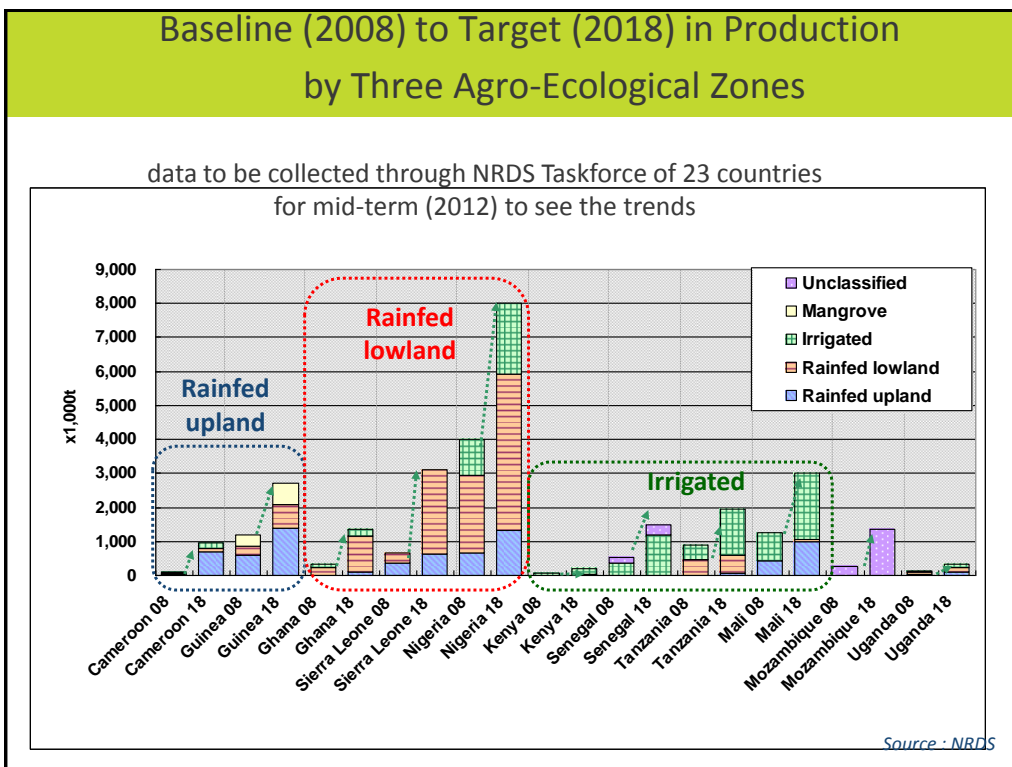


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Differences = FAOSTAT – Country Data (at GM4)

	MT			%		
	2008	2009	2010	2008	2009	2010
Cameroon	0	0	0	0%	0%	0%
Ghana	-80	440	-397	0%	0%	0%
Guinea	0	43,100	0	0%	3%	0%
Kenya	-30,001	-12,753	-30,452	-137%	-30%	-38%
Madagascar	2	5	-480,079	0%	0%	-10%
Mali	16,603	5	-3	1%	0%	0%
Mozambique	-104,471	-80,759	-77,527	-103%	-45%	-43%
Nigeria	779,000	-524,780	-862,180	19%	-15%	-27%
Senegal	-621	-36	5,960	0%	0%	1%
Sierra Leone	0	-103,680	-117,435	0%	-13%	-13%
Uganda	0	0	0	0%	0%	0%
Tanzania	0	-800	-1,510,225	0%	0%	-137%
Benin	0	0	45,817	0%	0%	28%
Burkina Faso	0	0	0	0%	0%	0%
Central African Rep	-19,029	-20,740	-23,843	-50%	-53%	-61%
Cote d'Ivoire	0	0	0	0%	0%	0%
DR Congo	0	0	0	0%	0%	0%
Ethiopia	-261,143	-473,332	-862,202	-1,069%	-1,893%	-3,421%
Gambia	4,016	15,264	20,014	10%	19%	20%
Liberia	0	0	0	0%	0%	0%
Rwanda	16,000	29,876	-3,427	20%	27%	-5%
Togo	0	0	0	0%	0%	0%
Zambia	0	0	0	0%	0%	0%

Source : Country's data provided by NRDS Taskforce at CARD GM4 and FAOSTAT

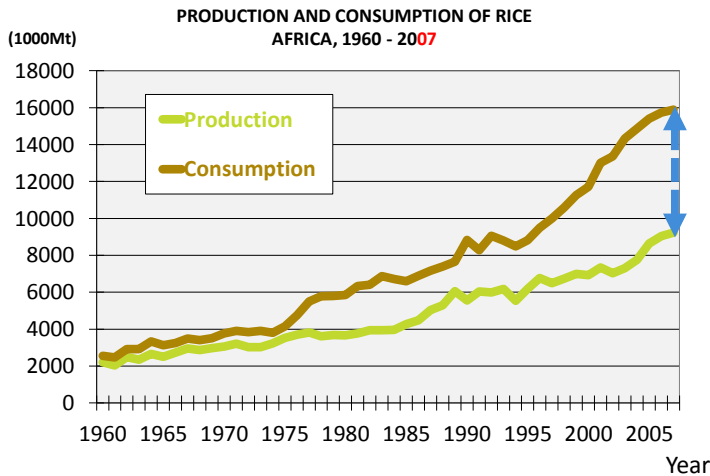
Challenges and Way ahead

Current Status/ Challenges	How to improve
<ul style="list-style-type: none"> • [Current Status] Aggregated data of 39 SSA countries from FAOSTAT while data by AEZs could only be available from 23 country data • [Challenges] How to deal with the gap between FAOSTAT and country data, given that production data by AEZs only available through country's stat? 	<ul style="list-style-type: none"> • [Plan]: collect country data on production by AEZs through NRDS TF of 23 countries and analyze trends • [Challenges (long-term)] How to strengthen national statistics <ul style="list-style-type: none"> ○ Annual routine/ administrative data collection (e.g. Ministry of Agriculture) and; ○ Once-in-five/ten-year national sampling/census household budget survey (e.g. NBS)



Source : Various – News Articles

Rice Production and Consumption in SSA (1961-2007)



Challenges and Way ahead

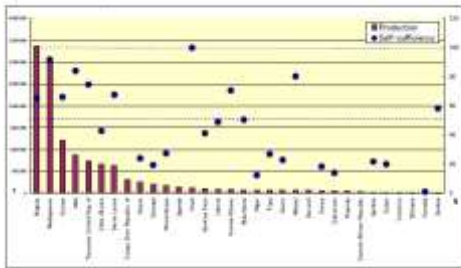
Current Status/ Challenges

- [Current Status] Aggregated data for production from FAOSTAT while consumption data from USDA

How to improve

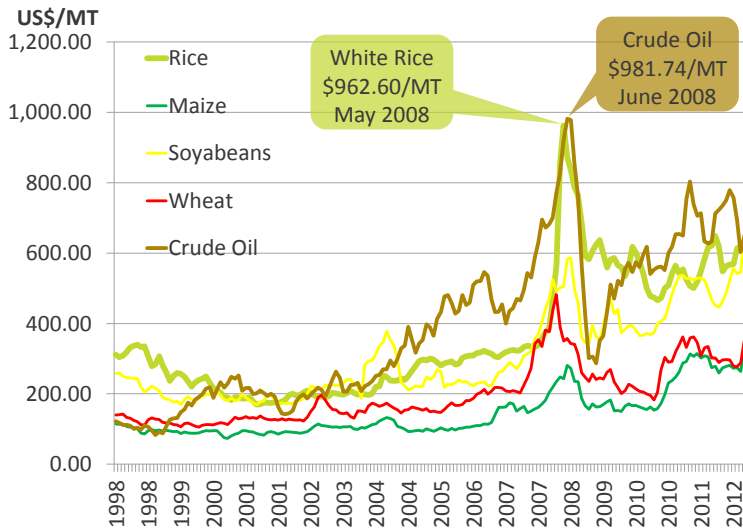
- [Proposal]: collect country data on production by AEZs through NRDS TF of 23 countries and analyze trends

Figure 4. Production (Paddy) and net millinery use of rice in Africa (Landed on the continent that produce 20,000 tons or more)



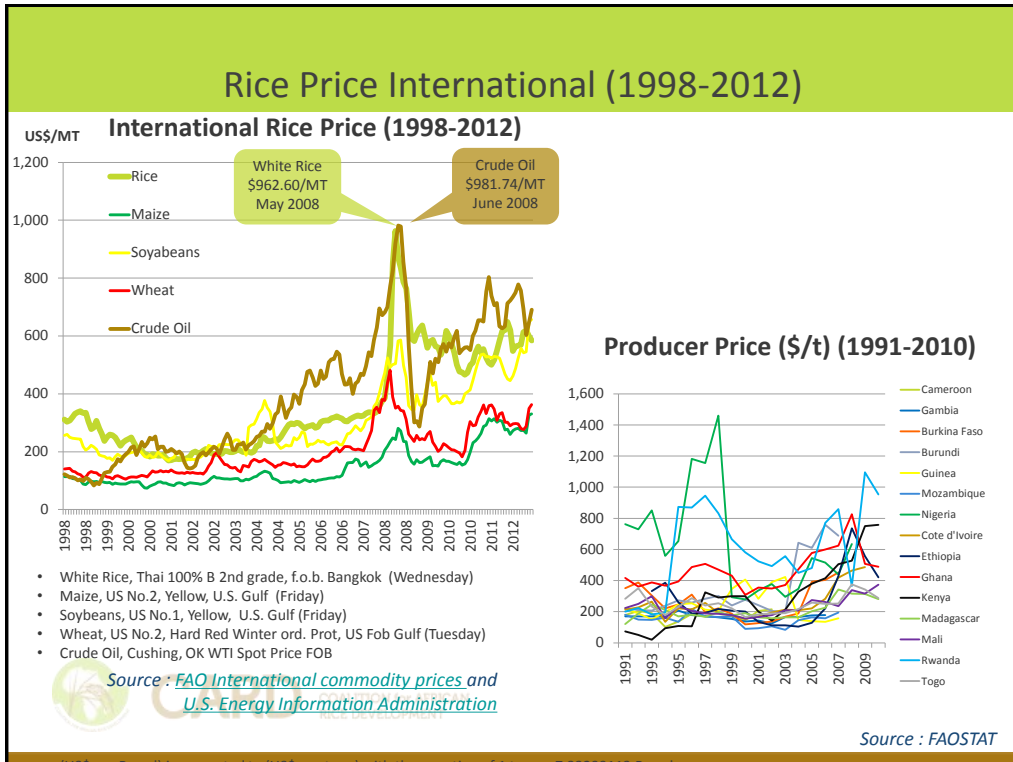
The production is an average from 2002 to 2008 (FAOSTAT). The net millinery use is in 2008 (World Food Summit) prepared by Sidanioum, J.M., Faculty of Agriculture, Khartoum University.

Rice Price (1998-2012)



- White Rice, Thai 100% B 2nd grade, f.o.b. Bangkok (Wednesday)
- Maize, US No.2, Yellow, U.S. Gulf (Friday)
- Soyabeans, US No.1, Yellow, U.S. Gulf (Friday)
- Wheat, US No.2, Hard Red Winter ord. Prot, US Fob Gulf (Tuesday)
- Crude Oil, Cushing, OK WTI Spot Price FOB

Source : [FAO International commodity prices](#) and [U.S. Energy Information Administration](#)



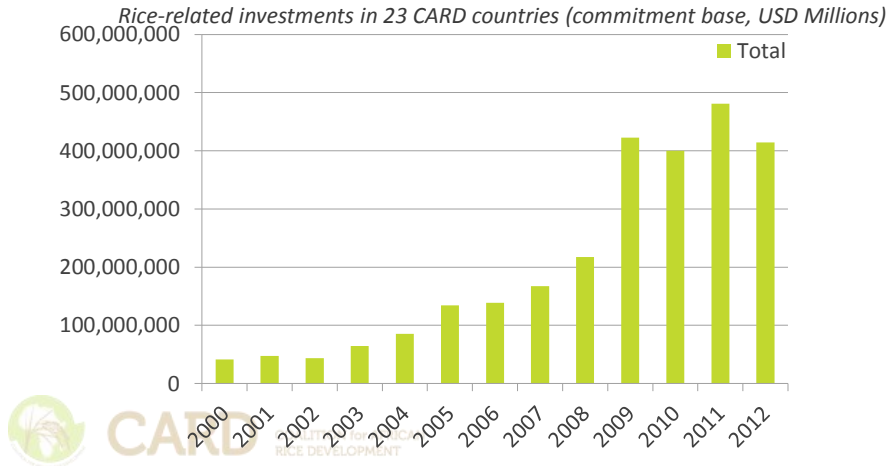
Challenges and Way ahead

Current Status/ Challenges	How to improve
<ul style="list-style-type: none"> • [Current Status] International Commodity Prices [Weekly] and Producer Prices [Yearly] from FAOSTAT • [Question] How has it affected local prices? • [Question] Are there any gaps between international price and domestic / local prices of each country? 	<ul style="list-style-type: none"> • [Proposal]: Comparative analysis on the prices between international price and local price • [Advice]: Source of data for local price? Ministry of Commerce and Trade of each country, FAO or WFP?

Source : Various – News Articles

Public Rice-related Investments: Trends over years

- Commitments by country: since 2000, including pipeline, on-going and completed, partly PPP, collected by CARD



ODA to Agriculture on 1971-2009

Chart 1. Trends in aid to agriculture and rural development (ARD) 1971-2009, 5-year moving average commitments, constant 2009 prices

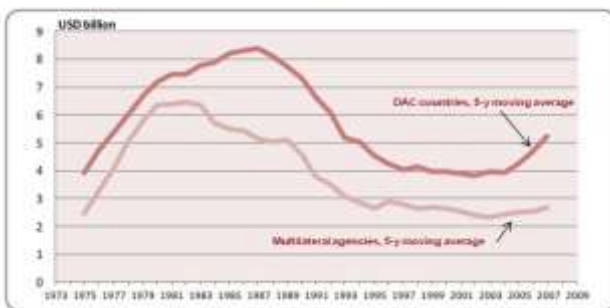
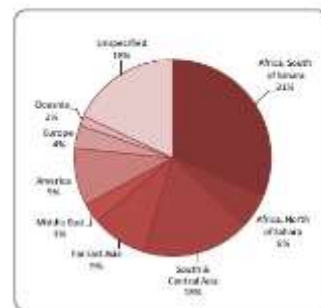


Chart 2. Regional breakdown of aid to ARD

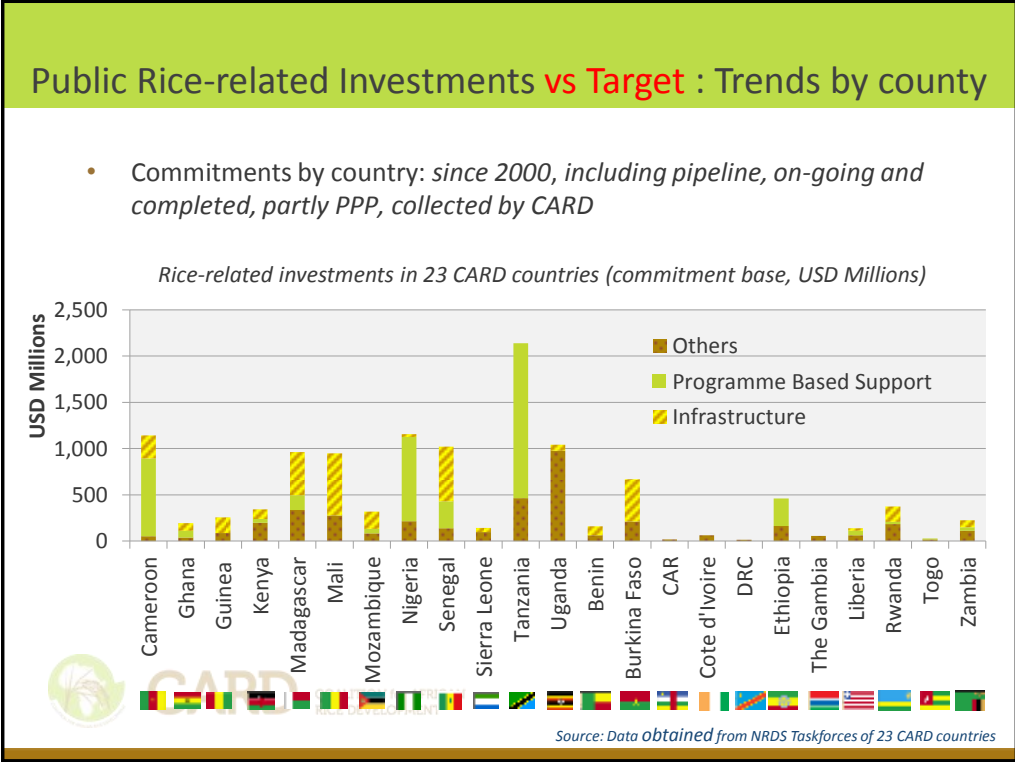
2008-09, bilateral and multilateral commitments, constant 2009 prices



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Source: OECD-DAC December 2011



Challenges and Way ahead

Current Status/ Challenges	Way ahead
<ul style="list-style-type: none"> • Commitment basis, not actual expenditure/ disbursement • Difficulty to attribute 'Rice' components for not commodity specific interventions • Missing data / Lack of Information 	<ul style="list-style-type: none"> • [Plan] Reconfirmation of data from countries – update, analysis on the comparison of commitments/ investments vs target production increase by country • [Plan] Comparison of rice-related investments with ODA in Agriculture

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Source : Various – News Articles

Donor Coordination: Synergies

- More and more dialogue among partners

- GRiSP – AfricaRice, IRRI and JIRCAS
- PHRD - WB
- WAAP/ EAAP - WB
- IFAD-FARA-IRRI-AfricaRice South-South Platform
- IRRI-JICA a Seasonal-long Training



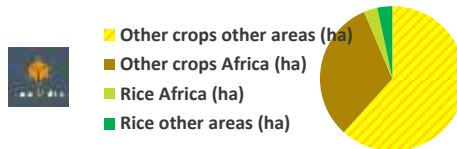
Source : Various – News Articles

Private Investments in Rice-related development

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]



- █ 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




Source : Various – News Articles

Private Investments in Rice-related development

(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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Source : Various – News Articles

Challenges and Way ahead

Current Status/ Challenges

- Case studies as examples, not comprehensive
- Mostly relied on the internet news source, not well verified

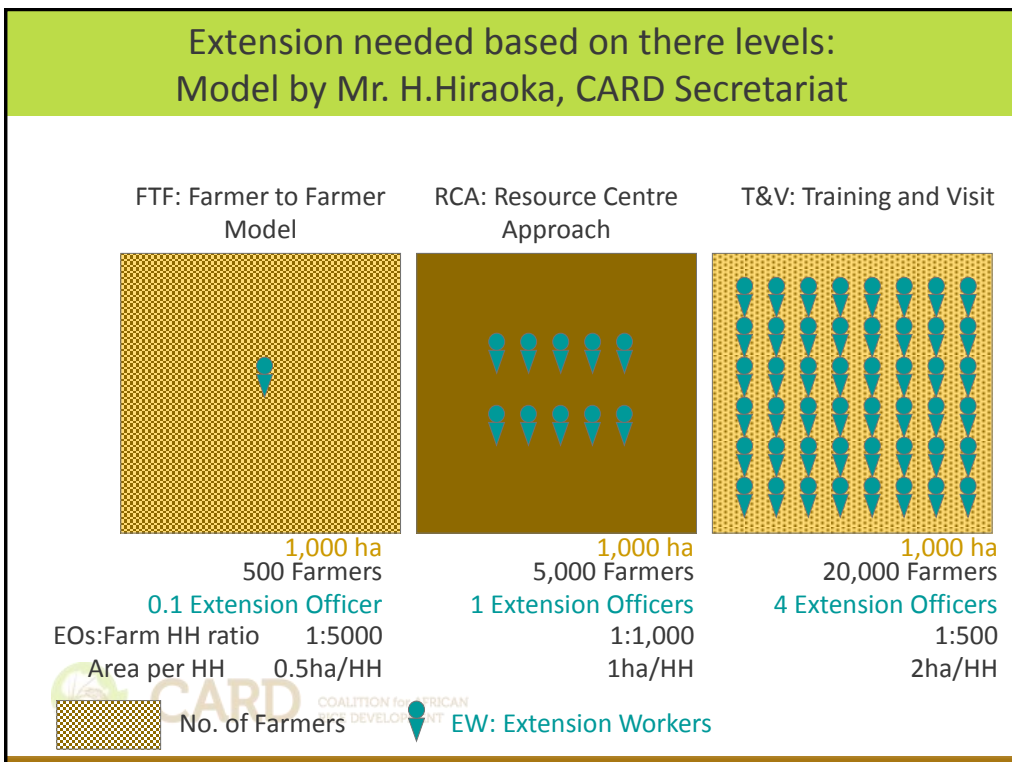
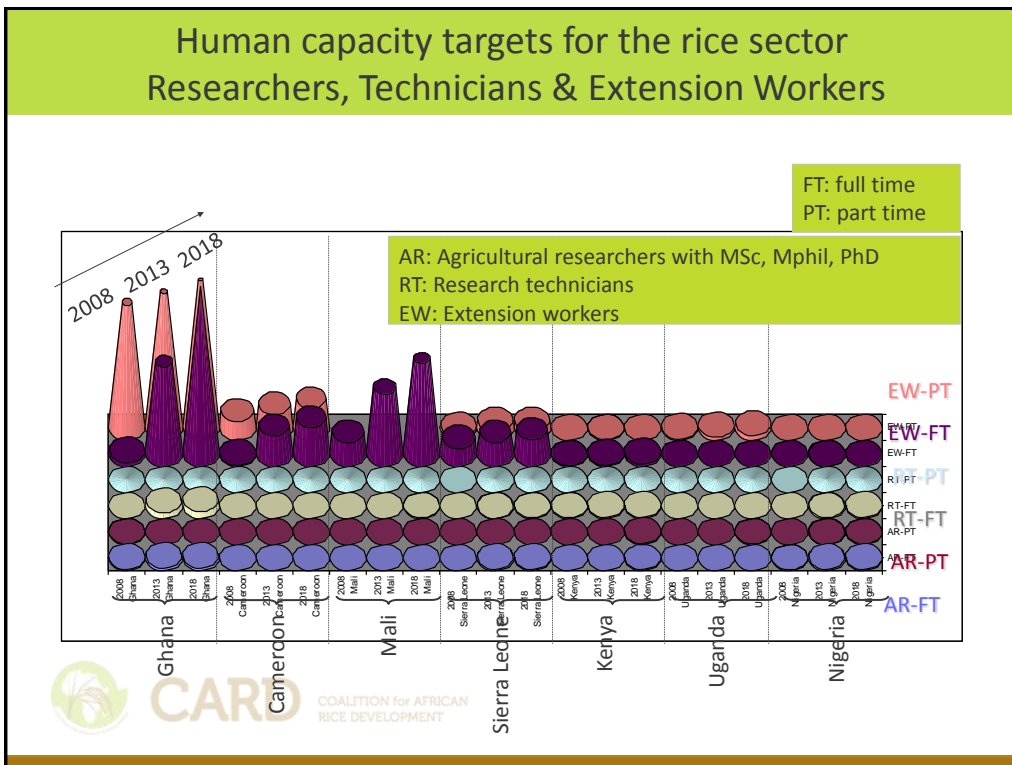
Way ahead

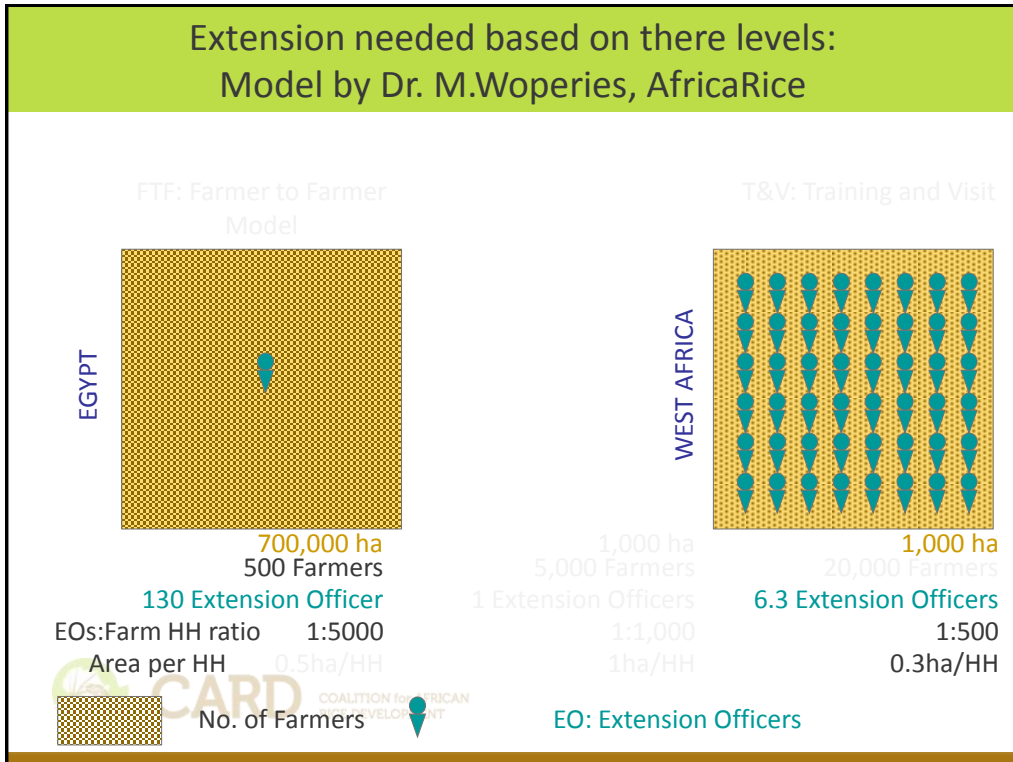
- [Plan] Verification through interviews/ questionnaires/ from other source
- [Plan] collect more case studies




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Source : Various – News Articles







	Target production area in 2018 (000 ha)	Low	Mid	High
		0.1 Extension Agent /1000 ha	1 Extension Agent /1000 ha	4 Extension Agent /1000 ha
Cameroon	353.0	35.3	353.0	1,412.0
Ghana	375.0	37.5	375.0	1,500.0
Guinea	1325.0	132.5	1,325.0	5,300.0
Kenya	36.2	3.6	36.2	144.8
Madagascar	1900.0	190.0	1,900.0	7,600.0
Mali	485.8	48.6	485.8	1,943.2
Mozambique	389.5	39.0	389.5	1,558.0
Nigeria	4,005.0	400.5	4,005.0	16,020.0
Senegal	327.0	32.7	327.0	1,308.0
Sierra Leone	1100.0	110.0	1,100.0	4,400.0
Tanzania	997.0	99.7	997.0	3,988.0
Uganda	465.0	46.5	465.0	1,860.0
Total		1,175.9	11,758.5	47,034.0




Rice Personal (Egypt and Thailand)

Category	Egypt (700,000ha)	Thailand (10,000,000ha)	Comparison
Rice Researchers	Government 19 Breeders 19 Agronomists 6 Pathology 6 Plant protection 2 Technology /Economics Total = 52	Government 120 breeders 100Agronomist Private Sector Similar no's Total =440	Egypt 1/36,000 ha Thailand 1/40,000 ha
Technicians	2/1=104	880	
Rice Extension	150	360 plus private	Egypt 1/5,000ha Thailand 1/13,000ha
TOTAL	256	2040	


Rice Personal Requirement (Mozambique)

Category	Present Production (200,000ha)	Double Area (400,000 ha)
Rice Researchers	3 -Breeders 3- Agronomist 1- Pathologist 1- Plant protection 1- Economist 1- Mechanization 1- Training TOTAL=11	5 -Breeders 5- Agronomist 2- Pathologist 3- Plant protection 1- Economist 2- Mechanization 1 Training TOTAL= 19
Technicians	22	38
Rice Extension Officers	22	44
TOTAL	55	101

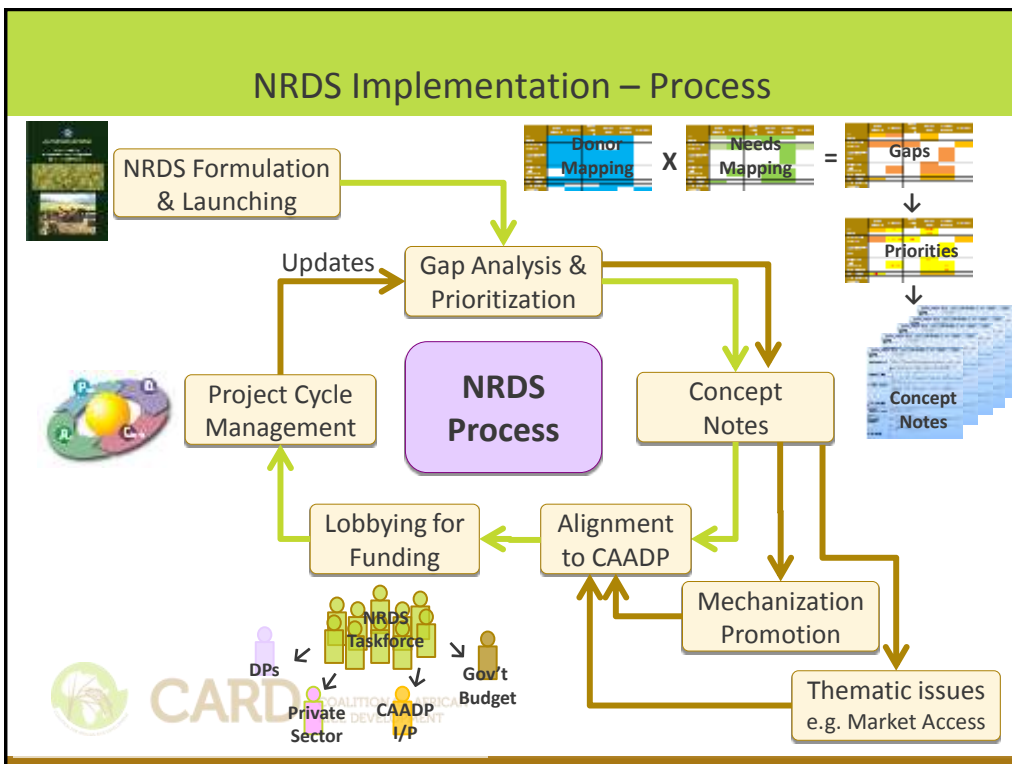


Challenges and Way ahead

Current Status/ Challenges	How to improve
<ul style="list-style-type: none"> [Current Status] Baseline (2008) and Target (2018) by 23 NRDS as well as estimation for needs based on their target areas with proportional analysis [Challenges] How to determine the level of qualified personnel? [Challenges] Policies – choice of models, Public vs Private 	<ul style="list-style-type: none"> [Plan]: collect country data through NRDS TF of 23 countries and analyze trends



Source : Various – News Articles



Capacity Development in strategic planning

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	→	→	→				

Concept Notes Operationalization

Country	Project/ Programme	Source	Amount (\$)
Cameroon	Upland Rice Development	JICA	\$3.8m [2011-2014]
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) [Pipeline]
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

Policy Environment

- NRDS
 - Mechanization: Policy Track – Enabling Environment
- Doing Business Report by the World Bank
 - Ease of Doing Business Rank / Starting a Business / Dealing with Construction Permits / Getting Electricity / Registering Property / Getting Credit / Protecting Investors / Paying Taxes / Trading Across Borders / Enforcing Contracts / Resolving Insolvency





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Achievements by SC members



Please see Meeting Document No. 6-3.
E.g. No. of Varieties released, Volume of improved seed production, Area of expanded/ rehabilitated irrigation infrastructure, No. of Researchers/ Technicians / Agro-Dealers / Extension Agents trained, etc



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South-south cooperation

The diagram illustrates South-south cooperation between Africa and Southeast Asia. It features a map of Africa with several countries highlighted in green, and a map of Southeast Asia with several countries highlighted in brown. Lines connect these regions to various activity boxes: 'Facilities', 'Human resources', 'Stock-taking', 'Study tour', 'Video Seminar', 'Seed', 'Quality', and 'WUA'. A box labeled 'More than 128' is positioned near the African map. Logos for IFAD, FARA, IRRI, and AfricaRice are shown on the left. The CARD logo (Coalition for African Rice Development) is at the bottom center.

Facilities

Human resources

More than 128

Stock-taking

Study tour

Video Seminar

Seed

Quality

WUA

IFAD
INTERNATIONAL FUND FOR AGRICULTURAL DEVELOPMENT

FARA
FEDERATION OF AFRICAN RICE ASSOCIATIONS

IRRI
INTERNATIONAL RICE RESEARCH INSTITUTE

AfricaRice

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South-south and other Supporting partners

The world map highlights supporting partners for CARD. The United States, Europe, and parts of Asia and South America are shaded in light green. Logos and flags for various organizations and countries are placed around the map: Bill & Melinda Gates Foundation (USA), USAID (USA), WFP (World Food Programme), afe (Africa Food Enterprise), KOICA (Korea International Cooperation Agency), brac (Brazilian Agricultural Research and Development Center), and flags for Ethiopia, Nigeria, Thailand, Vietnam, Philippines, Malaysia, and Indonesia. The CARD logo (Coalition for African Rice Development) is at the bottom center.

BILL & MELINDA GATES foundation

USAID FROM THE AMERICAN PEOPLE

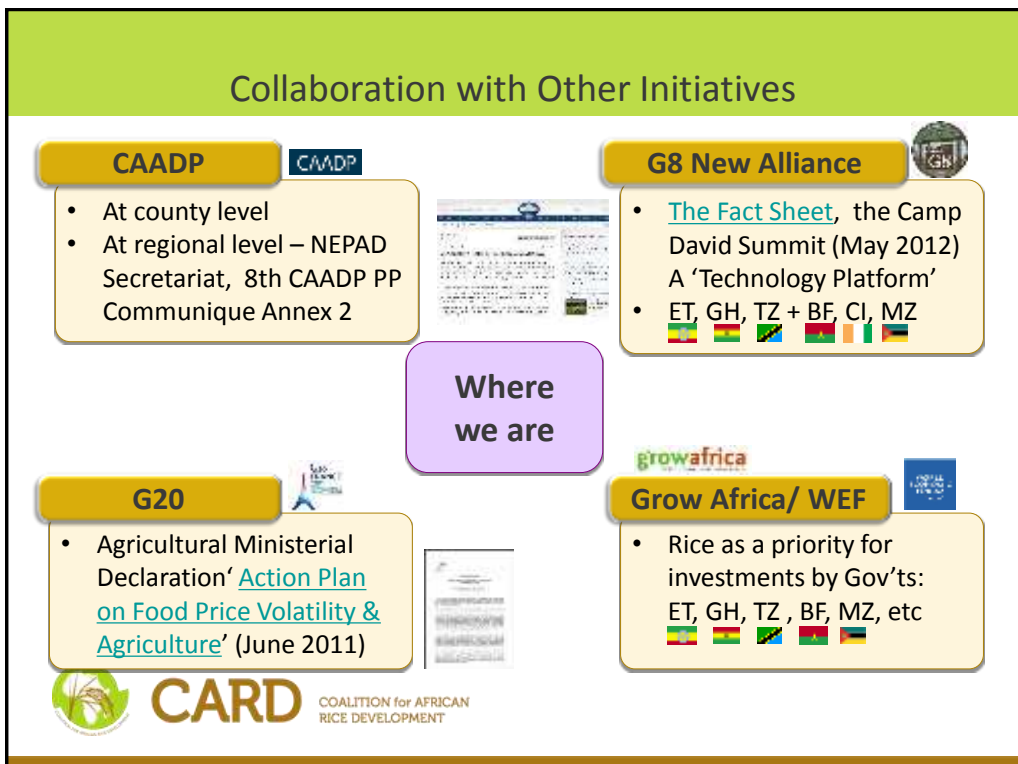
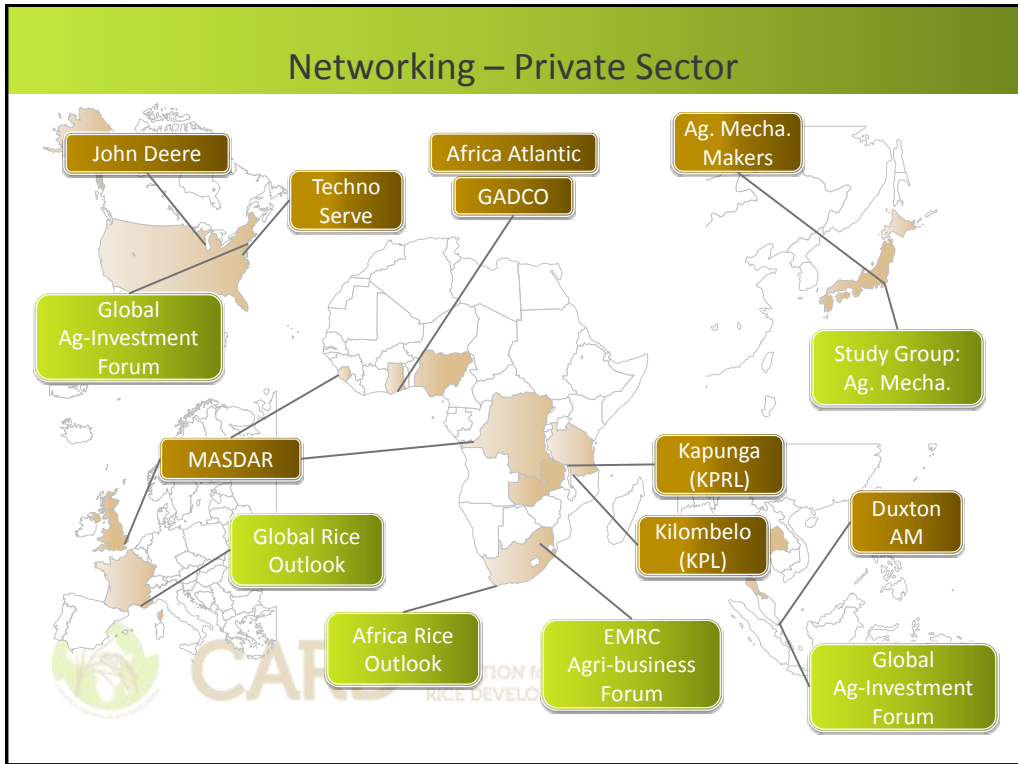
WFP

afe

KOICA Korea International Cooperation Agency

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Way Ahead

1. Economics of African Rice (*Can any institution to present?*)
2. Plans to improve data, analyses and presentations
3. Revisions/ Amendments based on advice/ suggestions/ comments by SC7
4. Any opportunities for technical support by experts



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THANK YOU



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