

Inception Report by Ghana Team

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Layout of Presentation

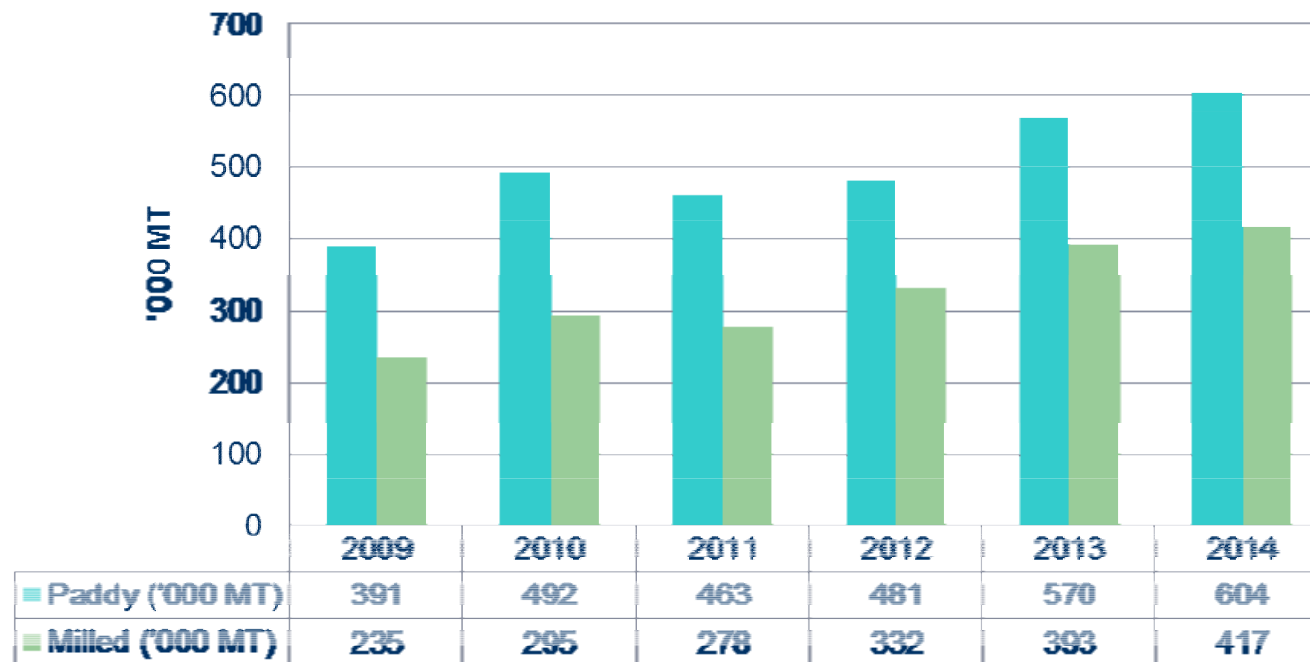
- Introduction
- Basic info on the Ghanaian delegates and their responsibilities in their org/departments
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- NRDS (National Rice Development Strategy) and Rice Sector in Ghana
- State of Rice Processing, Storage, Transport and Marketing infrastructures in Ghana
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INTRODUCTION

- Rice is one of the most important staple crop in Ghana (FASDEP II: Food security crop)
- The country is currently about 56% self-sufficient in rice production. Domestic production (milled rice) between 2009 and 2014 increased from 235,000MT to 417,000MT.
- Total area cultivated, within the same period also increased from 162,000 ha to 224,000 ha.

INTRODUCTION

Rice Production in Ghana

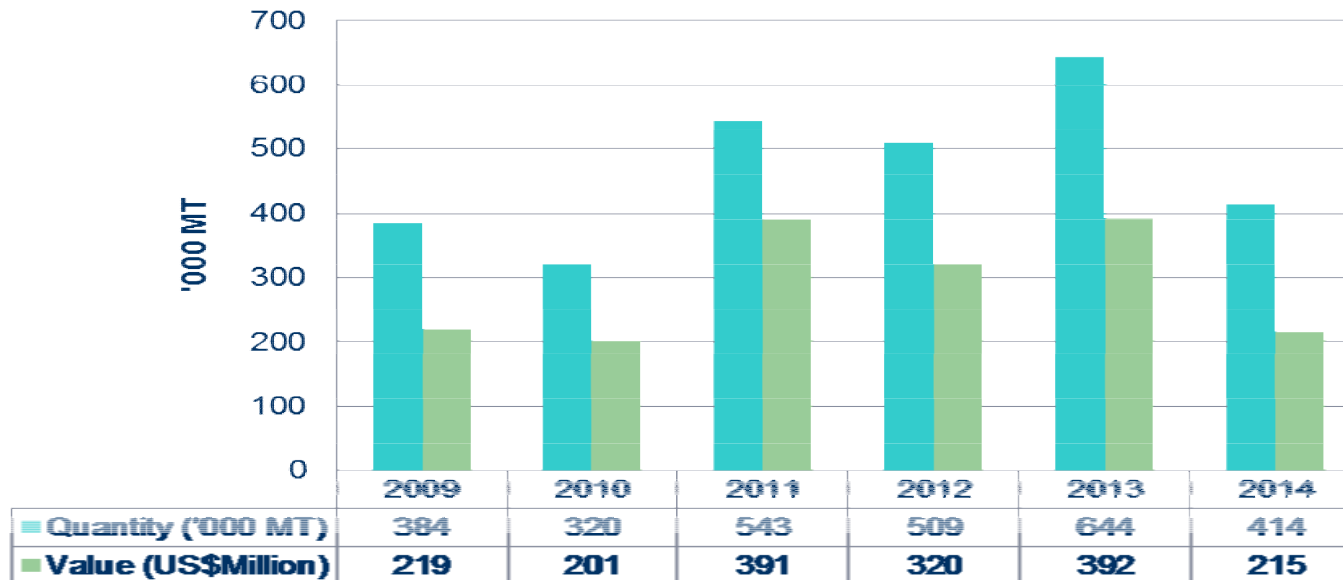


- Rice consumption in Ghana has seen a tremendous growth in the past six years from about 542,000MT in 2009 to around 748,000MT in 2014.

INTRODUCTION

- Ghana therefore relies on imported rice to meet its local consumption, spending an average of about 290M US dollars of its scarce foreign currency annually
- Rice imports into Ghana over the past six years has ranged from 384,000MT in 2009 to 414,000MT in 2014

Rice Import into Ghana



1. BASIC INFORMATION ON PARTICIPANTS

NAME	WILSON DOGBE	SOLOMON ANSAH GYAN
Country	Ghana	
Organization	CSIR-Savanna Agricultural Research Institute	Ministry of Food and Agriculture
Position	Head of Rice Research And Development Program at CSIR-SARI	Head of seed unit, MoFA

2.1 Responsibilities of delegate in Organization/Departments being Represented

Name	Wilson Dogbe	Solomon Ansah Gyan
Responsibility of Unit/division in organization	Responsible for Rice Research & Development (Technology development and transfer)	Coordinates seed sector activities (Policy formulation, capacity building etc.)
Responsibility of delegate	Coordinates the planning and implementation of rice research and development activities and advice the director on issues on rice	<ul style="list-style-type: none"> - Formation and implementation of National Seed Alliance - Implementation of National Seed Policy - Responsible for seed industry data
Involvement in NRDS	Member, NRDS. Involved in implementation of CARD related activities in Ghana. Participated, in most of CARD related activities in Ghana and represented the Country in 2014 in Nairobi during the CARD steering committee meeting and the	Member of NRDS

2.2 Duties of Organization/Departments Being Represented

Name	CSIR-SARI	DCS-MoFA
Duty	Conduct research into food and fiber crop farming in Northern Ghana	Department responsible for Crops
Vision	To become a lead research and development (R&D) Institution	To be a number one institution in coordinating crop development programs
Mission	To conduct agricultural research in Northern Ghana with the aim of developing and introducing improved technologies that will enhance overall farm level productivity for improved livelihoods	To advise the Minister of Agriculture on policies relating to the crop sub-sector thereby increasing the production and productivity of crops to improve food security and incomes
Status of Department on NRDS	Represented on the NRDS	Coordinates the NRDS

3. NRDS (NATIONAL RICE DEVELOPMENT STRATEGY) AND RICE SECTOR IN GHANA

THE NRDS IN GHANA

- Ghana was among the first-line countries supported by CARD to develop a National Rice Development strategy (NRDS) in 2009

VISION AND SCOPE

- To double local rice production by the year 2018 compared to 2009 production so as to contribute to food security and increased income for rice producers.

THE NRDS IN GHANA

Goal:

- To contribute to national food security, increased income and reduced poverty towards the attainment of self sufficiency from sustainable rice production.

Objectives:

- i. To increase domestic production by 20% annually using gender sensitive and productivity enhancing innovations for small holders, commercial producers and entrepreneurs along the value chain.
- ii. To promote consumption of local rice through quality improvement by targeting both domestic and sub-regional markets.
- iii. To enhance capacity of stakeholders to utilize rice by-products, thus contributing to sound environmental management practices.
- iv. To promote dialogue among rice stakeholders within the value chain towards building efficient information sharing and linkages

THE NRDS IN GHANA

- **CHRONOLOGY OF PREPARING THE NRDS**

- First FAO Regional Workshop in Rice and Aquaculture Productivity increase and Market Access (Kampala -Uganda November 3-7, 2008) (1st CARD General Meeting)
- Formation of Rice Task force to work on National Rice Development Strategy (NRDS) - (Accra-Ghana) December, 2008).
- Submission of First NRDS draft to CARD May 2009
- Second FAO Regional Workshop – to discuss draft NRDS – (Kampala, Uganda April 13-17, 2009). (2nd CARD General Meeting)
- Introduction of Strategy to Development Partners (Accra-Ghana 23rd April, 2009).
- MOFA Adoption of Strategy/During Workshop on Agriculture Sector Plan (30th April - 4th May, 2009)
- Meeting of Task Force to incorporate comments of Donors/MOFA into final draft
- Final Launching of the Ghana-NRDS Document (9th August, 2010) and submission to CARD
- National Workshop – ASEAN Experience (Accra –Ghana 9th -13th August 2010)
- Development of National Seed Road Map
- Revision of NRDS Document (February, 2015)

3. Current Situation of NRDS (National Rice Development Strategy) and Rice Sector in Ghana

- The main strategic areas highlighted in the NRDS are:
 - Rice Seed System;
 - Fertilizer marketing and distribution;
 - Post harvest and marketing;
 - Irrigation and water control investments,
 - Equipment access and maintenance'
 - Research and Technology dissemination:
 - Community Mobilization,
 - Farmer Based Organization and Credit management.
- Further to the NRDS, CARD has also supported Ghana to develop a “Rice Seed Roadmap” . & Concept notes
- NRDS been the main guide to rolling out of rice research and development projects in Ghana.

NRDS Concept Notes

- *Support for the Dissemination of Improved Rice Technologies*
- Infrastructure Development to Improve Seed Rice Quality
- Support for the Mechanization of Rice Production
- Mechanization Infrastructure
- Human Resources Development of Seed Production and Distribution
- Quality Improvement of Domestic Rice – Infrastructure Development
- Quality Improvement of Domestic Rice - Support for Value Chain Actors

Some on-going Projects towards achievement of strategy

- Enhanced Access to Quality Rice Seed Initiative (WAAPP support through DCS)
- EDAIF supported Rice Intensification Initiative (RII)
- Rice Seed Scaling Project: USAID support;
- West Africa Seed Program (WASP) supported by USAID
- Improvement and scaling up of the System of Rice Intensification (SRI) in Ghana. – Under WB-supported WAAPP 2A in collaborating with SARI.
- Sustainable Rice intensification Project (Phase 2)
- Rice Sector Support Project with emphasis on the development of Water Harvesting and Regulatory structures (WR&RS) on 6000 hectares of lowlands, with the support of the French Government, (2009-2016)

4. PLANNING, IMPLEMENTATION, OPERATION AND MANAGEMENT OF RICE PROCESSING, STORAGE, TRANSPORT AND MARKETING INFRASTRUCTURES IN GHANA

Rice Processing

- Paddy in Ghana is processed mostly by artisanal processors using the small 0.5 – 1.5 tons per hour one pass mills that may be the small engelberg mill or the Satake type robber roller technology.
- Quality of processing has improved significantly in recent time as a result of introduction of destoners and grading platforms into some of the mills
- The challenge however still has to do with the level of breakages that can be as high as 90% in the rainfed-produced paddy.
- Big commercial mills like the AVNASH Rice processing centre with a capacity of 500tons/day has just been established in northern region.

PADDY & Milled rice storage

- Paddy is generally stored at the farmer's house, the rice mill or the aggregator's house.
- Milled rice is stored at miller's and wholesalers' stores.
- The Ghana grains council has been encouraging farmers and aggregators to use their accredited grain warehouses in the regions.
- Capacities of these facilities are however low and are of poor quality.
- Majority of storages have good ventilation system, storage management is not satisfactory.
- None of the storage facilities known have air conditioning and moisture control.

TRANSPORT

- Locally produced paddy or mill rice is transported by millers, traders, farmers by road to the market.
- Road conditions are generally bad and sometimes not motorable.
- The distances between the rice producing areas and the major consumption areas are far.

Marketing of Rice

There is no structured market for locally produced rice. Many attempts to do that have failed. The current practice is described below

(a) Local traders/aggregators who supply consumption centers close to the production areas.

- Buy paddy from farmers
 - Process it at the local milling center
 - Sell it either directly to consumers or to traders
- In rainfed areas, where moisture of paddy can be very low, local traders buy paddy, parboil it before milling

Marketing of Rice

(b) Regional traders/aggregators have similar marketing functions like the local aggregators, but operate across larger distances and handle larger volumes

(c) Inter- Regional Traders

- Link regions with surplus to major consuming centers
- They mostly buy milled rice and organize transportation of milled rice to other regions.
- Sell milled rice to retailers

(d) Retailers

- May deal only with local rice or with both (local + imported)
- Retailers do the marketing of locally produced rice with little or no branding (packaging and advertisement). Most of the business is done in the local markets. Attempts at retailing at some supermarkets are beginning.

Challenges in rice processing, storage, transport and marketing

- Inadequate sustained access to quality paddy
- Management and processing Skills of managers and mill operator
- Inadequate storage capacity
- Poor access to operating capital
- Unreliable and high cost of energy
- High transaction costs
- Poor market penetration of domestic rice as a result of inadequate branding

Planning and implementation of processing activities

- Most of the processing facilities are one man businesses thus the planning and implementation of processing activities are done by the owner with little or no systematic planning

Challenges in planning, implementation and operation of processing and marketing infrastructures

- Lack of national, regional or district implementation plan, policy or model for paddy aggregation processing and marketing.
- Poor entrepreneurial skills of actors along the rice processing and marketing value chain
- Poor linkage and coordination of actors along the value chain
- Inadequate storage facilities for paddy and milled rice.
- Lack of storage facilities for medium to long term storage of cargo and milled rice
- Poor roads linking the production and processing centers
- High cost of energy
- Poor access to operating capital (High interest rate)

Ideas for solving challenges in planning, implementation and operation of processing and marketing infrastructures

- Enhance quality of milled rice to meet national/ISO standards through provision of appropriate machinery and capacity building in post harvest handling of produce
- Develop and promote a mutually beneficial aggregation model that links farmers to big mills and storage facilities
- Provide adequate storage facilities in the major rice producing and consumption areas
- Develop suitable packaging, labeling and branding of locally produced rice as a way of promoting its consumption
- Develop a sustainable rice value chain by enhancing capacity of all actors to adhere to strict quality control procedures
- Develop reliable price and market information system for use by stakeholders along the value chain

5. SOME CASES OF GOOD PRACTICE IN GHANA

CASE 1

- The Gatsby rice Project experience where different value chain actors/entrepreneurs (production, processing and marketing) work together to ensure quality branded rice at the market. In this model the three entrepreneurs sign an agreement to work together where the output from one was an input for the other.
- This model was piloted by CSIR-SARI between 2002-2004 with funding from Gatsby foundation of UK.

CASE 2

- The Brazilian Agro Case in the Volta region of Ghana where the company organizes itself from production through processing to marketing. Her products are branded and supplied to hotels, super markets and wholesalers and retailers.

CASE 3

- The Avnash mills Ltd case, where the mill supports farmers through aggregators with inputs and services. The aggregators in turn mobilizes quality paddy from farmers for Avnash mills Ltd for processing and marketing.
- In all these cases there are no government's direct role nor policy/legal framework in their organization
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THANK YOU