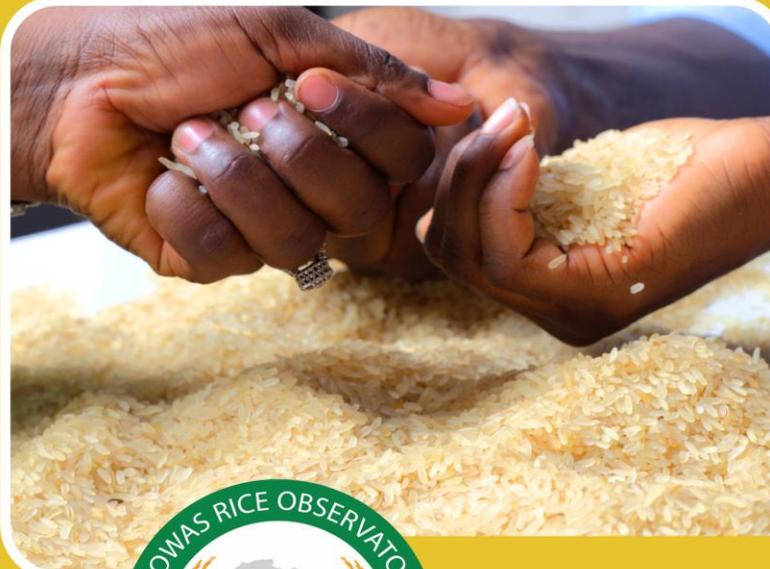




ECOWAS RICE AGENDA



ECOWAS RICE OBSERVATORY - (ERO)

PROMOTION OF SUB-REGIONAL LEVEL ACTIVITIES THROUGH THE REGIONAL ECONOMIC COMMUNITIES (RECS)

Partners



Presentation by:
ECOWAS Rice Agenda Coordinator

Date: 02/2026

Presentation outline | Promotion of Sub-regional Level Activities through the Regional Economic Communities (RECS)

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- Overview of rice sector developments in ECOWAS region (previous years)

2

- New trends and successes in the Regional Rice Sector Development

3

- Implementation of the Regional Rice Roadmap (2025 – 2035)

4

- Key Investment Opportunities towards Rice Sector Development in the region

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- ECOWAS Rice Observatory (ERO) - The Coordination Platform

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- Attracting Investment: Regional Investment Roundtable (upcoming Q2 2026)

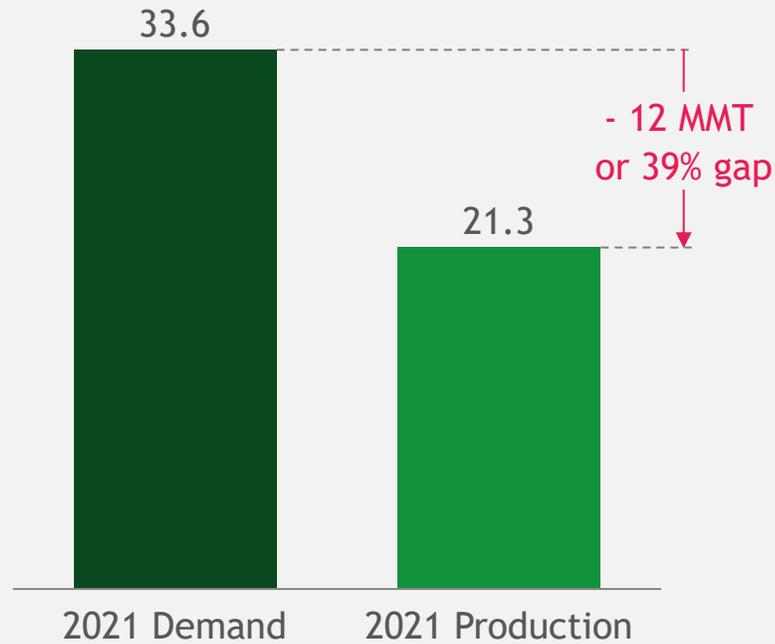
Overview of rice sector developments in ECOWAS region (previous years)

Across West Africa, local production meets ~61% of demand, with significant variation in self-sufficiency ratio across countries

Demand exceeds local prod. leading to an average self-sufficiency rate of ~61%

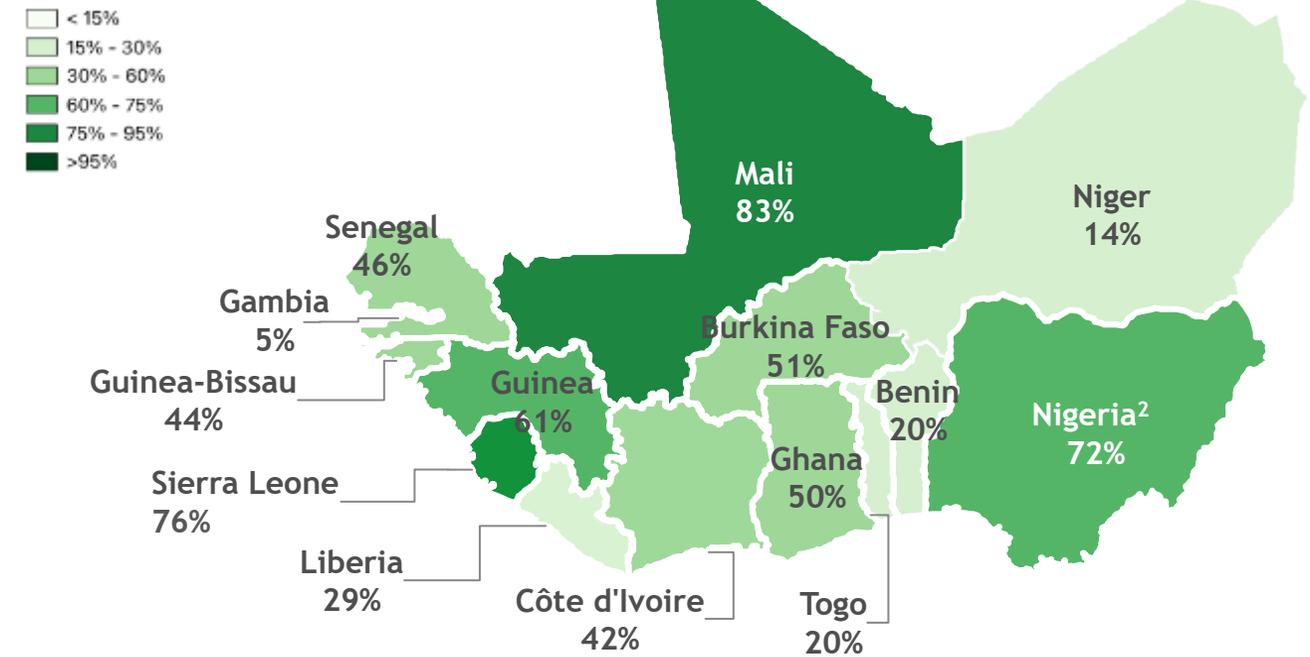


Total rice production gap for milled rice in West Africa (2021, paddy eq. million MT)



Significant variation across countries, with Mali, Nigeria and Sierra Leone closest to meeting national consumption needs

Self-sufficiency ratio across West Africa (FAOSTAT, 2021)¹



1. SSR = Production + Import - Export x 100 as defined by FAOSTAT; 2. USDA Production and Domestic Consumption figures used to calculate SSR in Nigeria using the following formula $SSR = \frac{Production}{Domestic\ Consumption}$
Source: FAOSTAT Food Balance (2021)

New trends and successes in the Regional Rice Sector Development

As the terms of the Rice Offensive and Regional Action Plan came to an end in 2025, there had been a renewed agenda for regional rice self-sufficiency



The Regional Rice Roadmap adopts a framework anchored on a vision and ambition



Progress towards cost-competitive and cost-effective rice self-sufficiency in W. Africa

Interventions anchored on sustainability, nutrition, gender equity and socio-economic inclusion

Vision & Ambition

7 Themes for Action

Increase productivity & sustainable rice production, focusing differentially on high pot. production basins

Improve and optimize supply chain and processing infrastructure & quality

Accelerate development of local/regional rice markets

Improve financing across the value chain and adequate de-risking mechanisms to encourage financing investments

Implement policies to encourage local/regional rice sector investments & trade

Improve data collection and knowledge sharing to enhance the use of analytics for decision making at all levels

Enhance capacity building on policy development amongst national and regional governments / bodies

Regional & Country Actions & Investment Plans



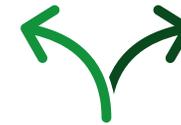
Coordination of stakeholder actions (gov't, private sector, development)

Purpose of the Roadmap | A framework of actions and potential pathways for regional rice self-sufficiency



What the Roadmap is...

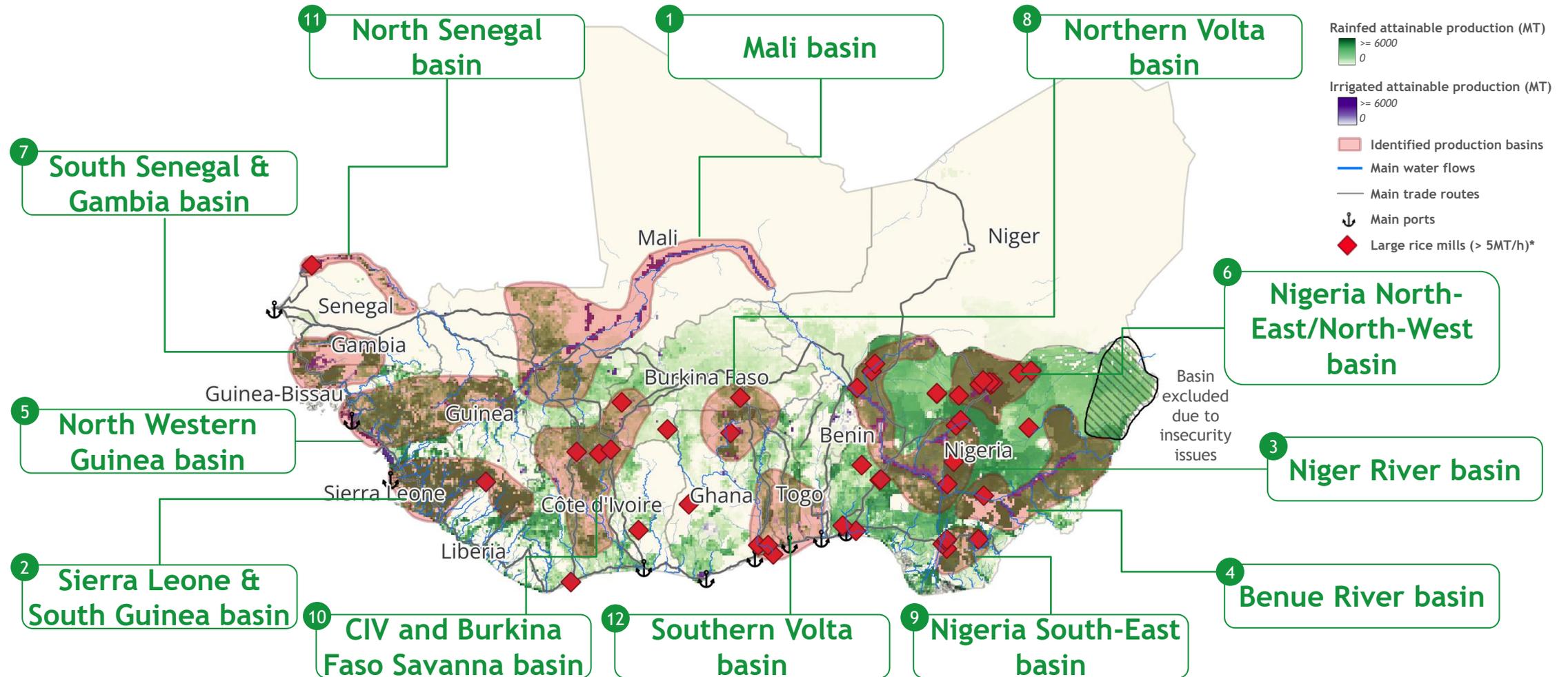
- A **unified vision to achieve rice self-sufficiency** for the ECOWAS region, along **with an analytical view of potential pathways** and investments
- A framework of 7 themes and 15 actions to achieve the vision and coordinate the actions of key stakeholders across the rice value chain
- An **extension that builds on** the actions and learning from **previous and ongoing efforts** including the Rice Offensive, Regional Action Plan, NRDS Plans



... versus what it is not

- A **single prescriptive pathway** for ECOWAS or its Member States - the Roadmap recognizes there are multiple pathways to achieve the vision
- A **replacement for the National Rice Development Strategies**, though Member States may elect to update their national plans to reflect the Roadmap
- An assessment of **individual Member States' progress** or action plans

Prioritized Production Basins | Layering production potential, water flows and infrastructure to identify 12 regional production basins across ECOWAS

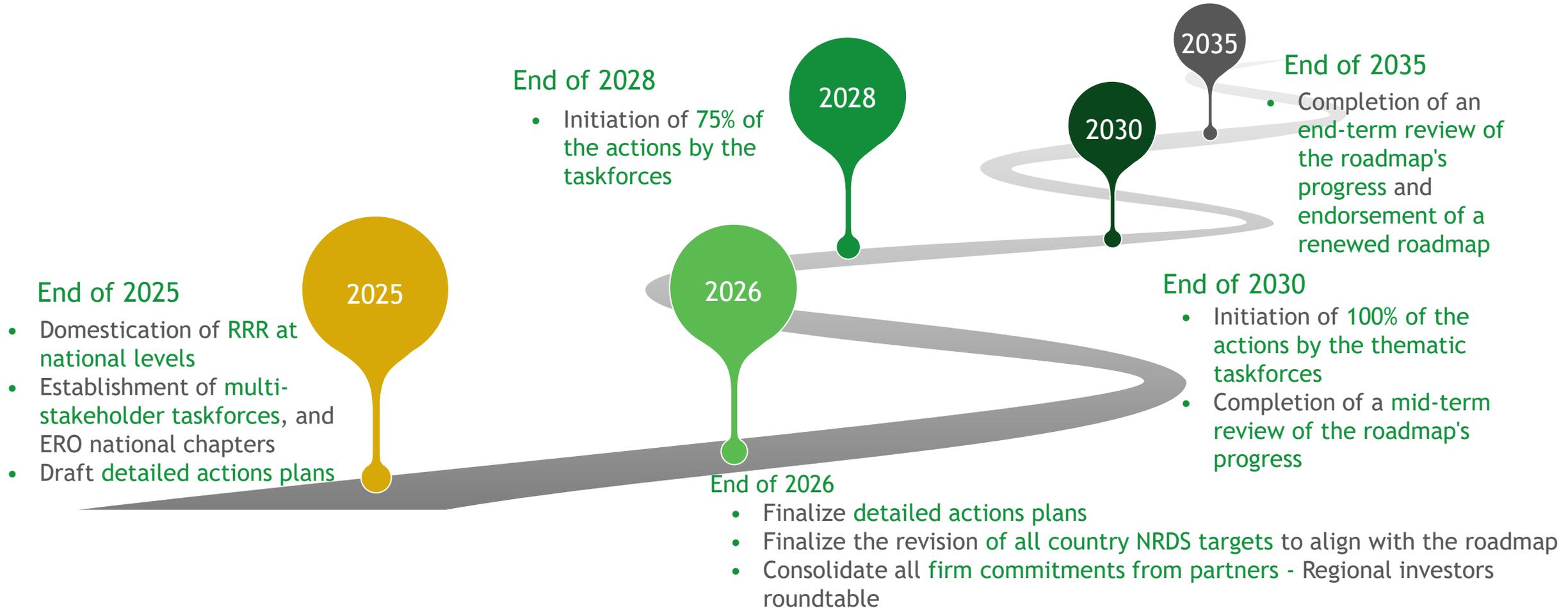


*Non exhaustive view of the mills
 Source: WOFOST; SPAM v2017; FAOSTAT 2021; European commission Africa Knowledge platform - trade corridors; BCG analysis

Implementation of the Regional Rice Roadmap (2025 - 2035)

Overview of implementation plan | 2025 to 2035

ECOWAS Council of Ministers **adopted** the RRR on the 13th of December 2024, and the **ratification** took place at the ECOWAS Heads of State submit on the 15th of December 2024.



Key Investment Opportunities towards Rice Sector Development in the region

Overview | Estimate investment of ~\$15-18B (CAPEX) and \$4-5B (annual OPEX) required to achieve self-sufficiency ambition by 2035

\$15-18B
CAPEX
(over 10 yrs)

\$1.5-1.8B per year for irrigation, mechanization, milling and storage/drying infrastructure

\$4-5B
OPEX

Incremental annual operating expenses for seeds, fertilizers, extension, working capital financing

Note: All costing figures provided are indicative of total funding envelope needed at the regional level and require further detailing for priority basins

Potential impact in 2035

36MMT
3x local production volume

\$5-7.5B
reduced import bill for rice

~\$35B
valuation of W. African rice market in 2035

ECOWAS Rice Observatory (ERO)

The Coordination Platform

Why ERO was created?

The ERO's main objective is to help key actors in the West African rice sector better coordinate policy and work synergistically

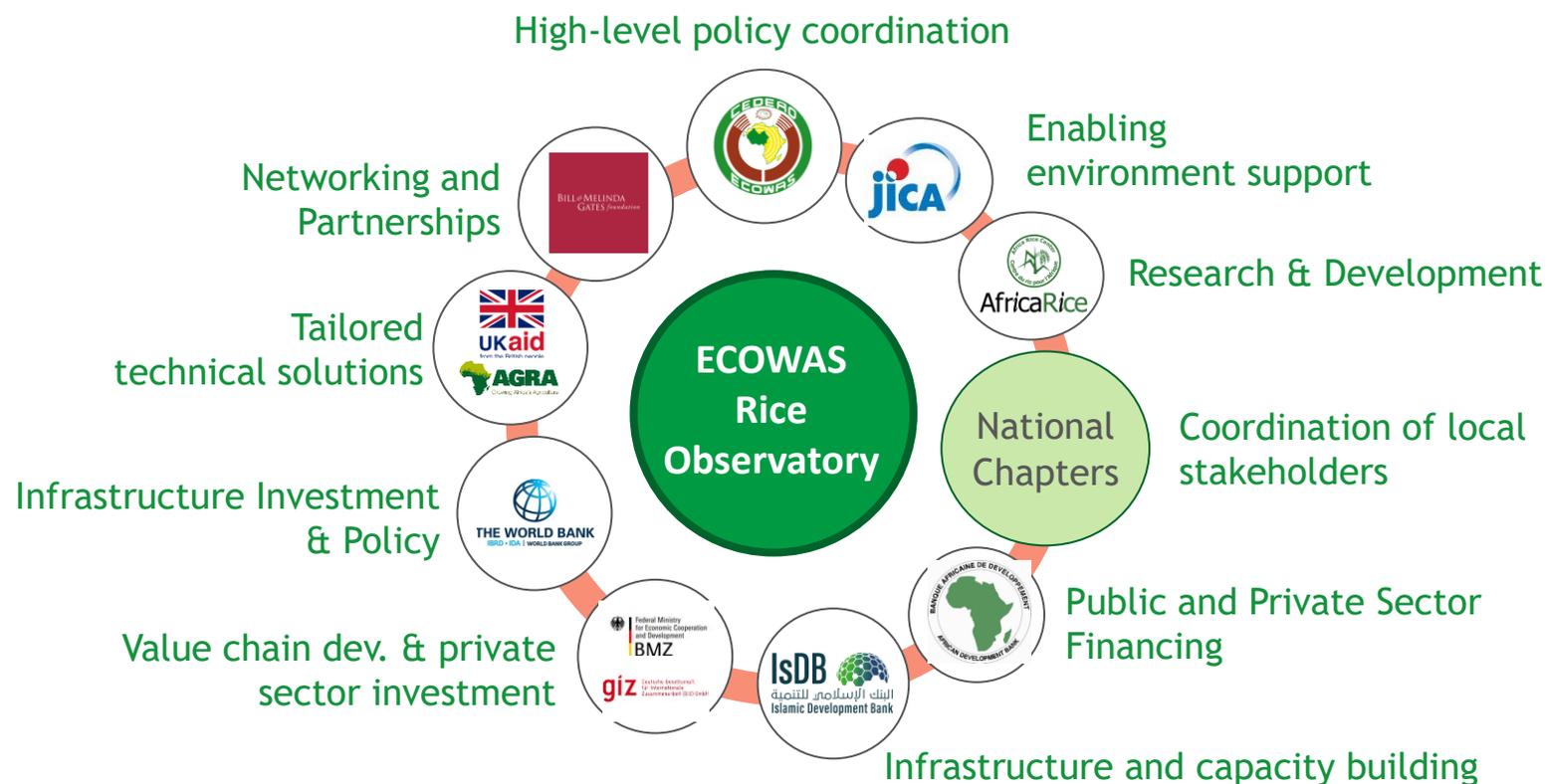


Context | ECOWAS Rice Observatory was created with the goal to better coordinate key actors in the West African Rice sector

ERO Functions

- Coordinate government, private sector and donor investments into market driven solutions
- Provide input on policy harmonization from actors' perspectives across the rice value chain, including women & youth
- Facilitate access to finance across the value chain

ERO positioned at the center of the West African Rice ecosystem to reinforce synergies between key players



Context | The vision and objectives of ERO fully aligned with the ECOWAS Rice Agenda

Vision

West Africa will achieve rice self sufficiency by 2035 through profitable, resilient, and environmentally sustainable farming and milling enterprises that contribute to rural economic growth, poverty reduction, and women's equity

Strategic objectives

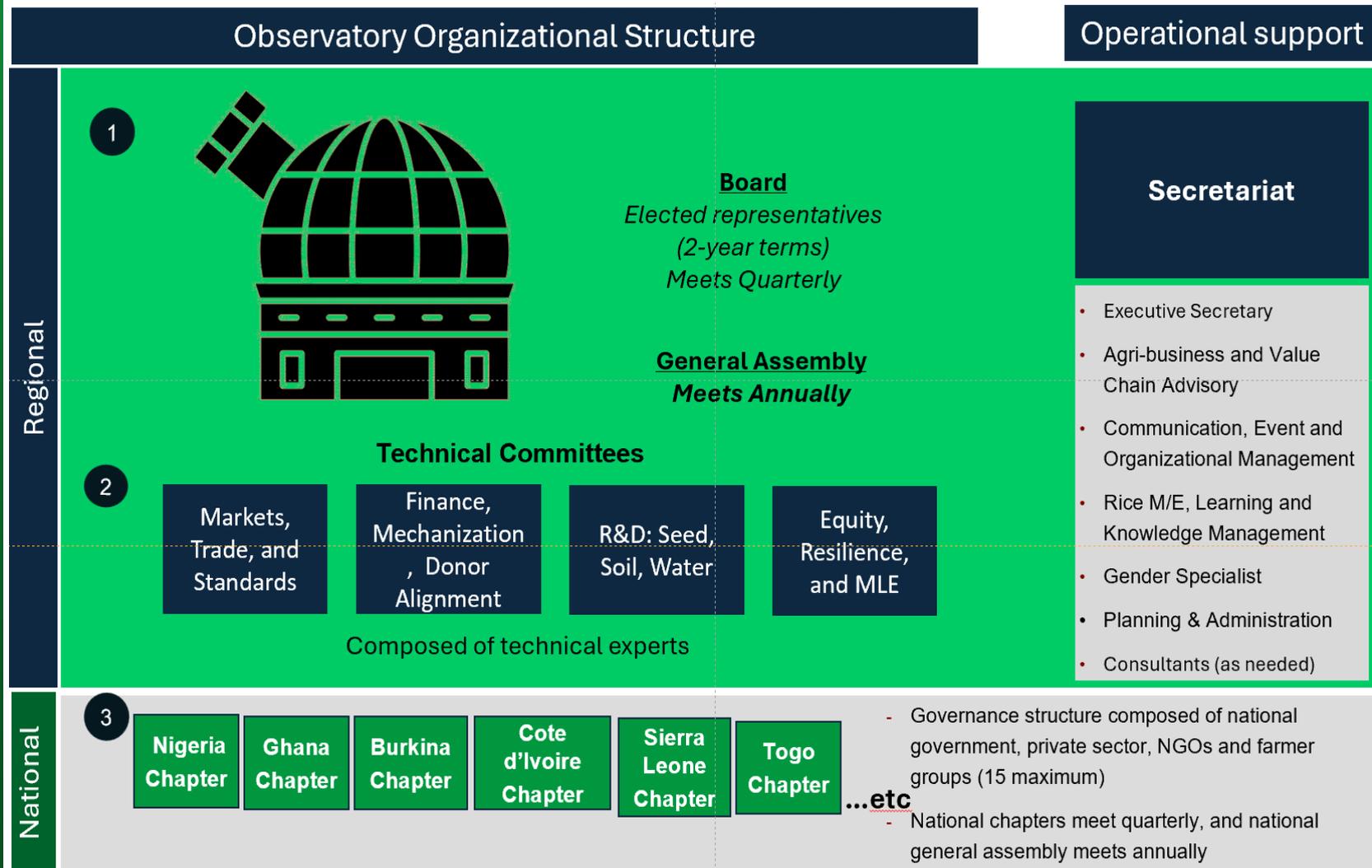
- **Inclusive business models and productivity:** Improve the viability of business relationships via processors
- **Knowledge management and cooperation:** Foster exchange rice value experiences
- **Financial services:** Improve access to financing to support major value chain stakeholders
- **Policy advice:** Ensure private sector interests are reflected in national rice policies

Associated outcomes

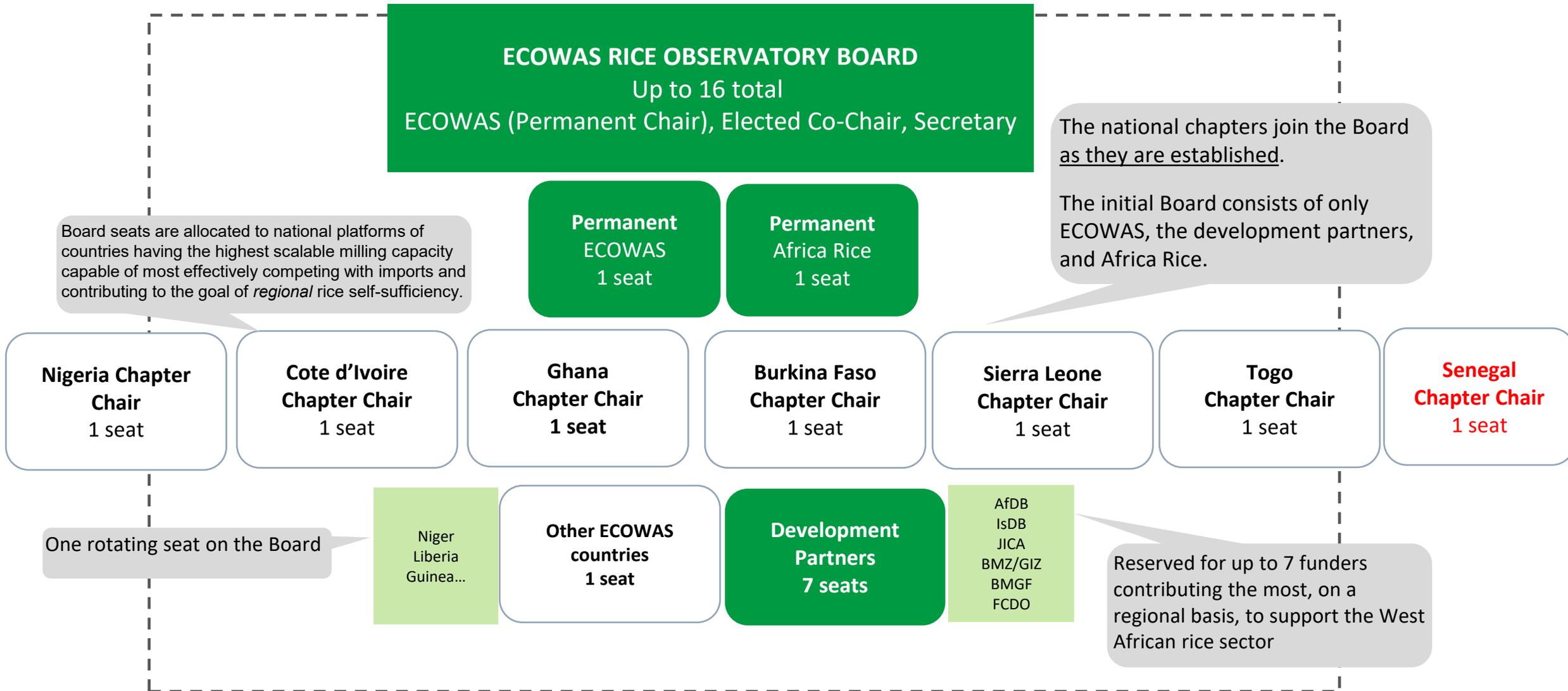
- **Partnerships:** Enhance multi stakeholder partnerships through facilitating rice private sector “voice” in national policy discussions
- **Food security:** Improve incomes and food security for direct and indirect participants of the rice value chain
- **Economic development:** Support dignified employment generation, especially for women in smallholder households, and economic development
- **Rice agricultural development:** Enhance sustainable and productive rice agriculture through training in good agricultural practices (GAP) and climate change adaptation according to Sustainable Rice Platform (SRP) standards

The ERO structure in a nutshell

ERO operates at both regional and national levels, supported by a full-time secretariat



Governance Structure of the ERO



ERO's Role | ERO act as coordinators and influencers with the rice sector in West Africa, with greater focus on four key functions



Improve data collection / flows to drive decisions



Catalyze action at the regional/national level



Provide visibility/coordination of funders/investments



Serve as a knowledge sharing platform

Regional Secretariat

- Set/track/consolidate KPIs & assess roadmap progress *(in collaboration with CARD)*
- Support NCs to improve / consolidate rice sector data in a regionally consistent manner *(in collaboration with CARD)*
- Design and implement a com. strategy to highlight trends

- Support National Chapters, inc. political influence, technical assistance, coordination...
- Engage stakeholders to drive investments towards best options (e.g., invest. packages)
- Provide inputs/expertise on policy harmonization and regional flagship projects

- Build/Maintain/Share database of Rice-related investment programs from DFIs/Govts (+others as feasible)
- Facilitate linkages with funders & coordinate actions at the regional level (e.g., focus on production basins)

- Serve as a platform to share:
 - Best practices/case studies
 - Innovative models
 - Expertise/technical advisory
 - Digital tools/tech
 - Trainings
 - Support on policy

National Chapters

- Advocate for and Drive improvements in rice sector data (timeliness, accuracy/quality, etc)
- Help secretariat navigate to best national Rice sector data

- Support development of national plans, by providing inputs and engaging private sector in the process *(in collab. with NRDS focal points)*
- Serve as national platform for execution orchestration and tracking, by bringing together public, private, and DFIs *(in collab. with NRDS focal pts)*

- Provide information on investments to Secretariat (national-level) and in-country partners (regional-level)
- Connect donors with public and private sector beneficiaries

- Connect in-country partners/stakeholders to the regional knowledge sharing platform

Attracting Investment: Regional Investment Roundtable (upcoming Q1 2026)

Background: In-Country Political Engagement

Domestication of Regional Rice Roadmap

Background

- In December 2024, ECOWAS Heads of State ratified the Regional Rice Roadmap (2025-2035) to achieve rice self-sufficiency by 2035, outlining seven thematic areas and sixteen priority actions.
- Member states must domesticate the Roadmap by aligning it with their National Rice Development Strategies and creating investment plans.
- Successful implementation depends on strong political commitment and active involvement of stakeholders across the rice value chain.

Rationale

Political engagement missions will create opportunities to:

- Secure government endorsement and alignment of the roadmap with national policies.
- Mobilize political champions and build high-level commitment for implementation.
- Facilitate multi-stakeholder platforms, including private sector, civil society, and research institutions, to participate in national domestication processes.
- Lay the groundwork for developing National Rice Investment Action Plans with costing, prioritization, and financing mechanisms.

Objectives of the Mission

- Facilitate dialogue with the national stakeholders to plan their investment action plans and prepare them for the regional investment roundtable.
- Advocate for the domestication of the Regional Rice Roadmap (2025-2035) within the national policy frameworks while positioning them for resource mobilization.
- Strengthen alignment between the roadmap and the country-specific NRDS by sensitizing the political leaders, officials and stakeholders on the roadmap's benefits and strategic priorities.

Background: In-Country Political Engagement

Domestication of Regional Rice Roadmap

APPROACH

- Conduct high-level meetings with Ministers.
- Mobilise the working teams at all levels within national stakeholders.
- Organize focused group discussions to align national priorities with the Regional Rice Roadmap.
- Initiate the drafting process for the National Rice Investment Action Plans (NRIAPs) and provide guidance to national rice focal persons and working group members on the effective use of the standardized template.
- Introduce the consulting firm for support.

OUTCOMES

- Political endorsement of the Rice Roadmap domestication process at country level.
- Commitments secured to support the development of National Rice Investment Action Plans.
- Clear roadmap for integration into national agricultural and investment plans.
- The constituted working team to finalise the National Rice Investment Action Plan until December 2025, towards participation at the upcoming roundtable in the Q1/2026.

DURATION AND TIMELINE

- In September to December 2025, missions covered all ECOWAS countries.
- Domestication adapted to each country's NRDS status.
- Missions prioritized by NRDS progress.
- Virtual meetings used when needed.
- Schedule confirmed with authorities and partners.

Developing the National Rice Investment Action Plan: Progress tracker (1/1)

BF - Burkina Faso BN - Benin GB - Guinea Bissau SN - Senegal
 GH - Ghana CIV - Côte d'Ivoire LB - Liberia TG - Togo
 NG - Nigeria GA - Gambia ML - Mali
 SL - Sierra Leone GU - Guinea NR - Niger

Steps	Activities	Progress Status															
		BF	GH	NG	SL	BN	CIV	GA	GU	GB	LB	ML	NR	SN	TG		
Kick-off domestication of Regional Rice Roadmap (RRR)	• In-Country Political Engagement	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	
	• Political endorsement: RRR domestication process	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	
	• Mobilize the working teams	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	
	• Initiate the drafting process for the NRIAPs	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	
	• Introduce the consulting firm for support	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	
Preliminary Alignment of NRDS & RRR	• Document Review and stakeholder consultations	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	
	• Align NRDS with the RRR and Update concept notes with consultation feedback as relevant	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	
Blueprint of the National Rice Investment Action Plan	• Narrative of the NRIAP	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	
	• Costing and Budgeting for NRIAP	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	
	• Develop Investment Proposal Packages	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	
	• Finalization, Harmonization & Validation	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	
Investors Mapping	• Identify and segment potential investors	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	

Completed

Not started



Advancing the Regional Rice Roadmap (2025-2035) | Regional Investment Roundtable

The overarching goal of the roundtable is to attract and mobilize investments into West Africa's rice sector by engaging potential financial investors, securing concrete commitments, and fostering partnerships that will accelerate the implementation of the Regional Rice Roadmap. Ultimately, it will advance ECOWAS's goal of regional rice self-sufficiency by 2035 and national priorities.

The objectives are:

- **Present country-level updates on rice sector development** and the status of NRDS implementation, providing opportunities for in-depth discussions. Enabling investors and partners to identify tailored opportunities for engagement and support at the national level.
- **Catalyse regional rice investments and interventions**, laying the groundwork for follow-up national investment roundtables and unlocking the first wave of investment commitments
- **Identify and address investment barriers** by analysing challenges and gaps. This leads to the formulation of targeted policy and technical solutions to improve the investment climate.
- **Stimulate financial and technical support** for national rice investment initiatives which will result in an actionable pipeline of bankable projects aligned with NRDS priorities.
- **Strengthen networks and collaboration** between West Africa countries, development partners, and investors.
- **Revamp the ECOWAS Rice Observatory** with reaffirmed commitments and partnerships as a mechanism for continuous dialogue, monitoring, and follow-up on investment commitments.

Regional Investment Roundtable

Activity status		
Description	Roles and responsibilities	Budget & Donor partner
<p>Organizing the roundtable is to mobilize investments and secure concrete commitments to accelerate the Regional Rice Roadmap, driving ECOWAS toward regional rice self-sufficiency by 2035.</p> <p>Venue - Ghana Date - Q2 , 2026</p>	<p>Inputs for the Roundtables:</p> <ol style="list-style-type: none"> 1) The 14 NRDS II of the West Africa rice producing countries - <i>All member states</i> 2) The 14 Country-Level Investment Packages: <i>To be developed and submitted by each countries before the roundtable event.</i> 3) Regional Rice Action Plan: <i>Preparations are underway to develop a Regional Rice Action Plan, with technical support to be provided by the Technical Committees.</i> 4) Regional Rice Investment Compact to be signed by the key stakeholders keynotes of key donors' intervention, <i>ERO will consolidate and present during the Roundtable.</i> 	<ul style="list-style-type: none"> • Co-financed by: ECOWAS, World and AfDB



Thank you

