



CARD

Coalition for African Rice Development
Coalition pour le Développement de la Riziculture en Afrique

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

Regional Rice Value Chain Development in SADC: Progress, Gaps and Priorities

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General Information about SADC

SADC IS A LARGE REGIONAL MARKET WHERE RICE MATTERS FOR FOOD AND NUTRITION SECURITY, INDUSTRIALISATION AND TRADE.

Southern African Development Community (SADC):

REC with 16 Member States (Angola, Botswana, Comoros, Eswatini, DRC, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Tanzania, Seychelles, South Africa, Zambia and Zimbabwe).

CARD member countries (7)

Angola, Democratic Republic of the Congo, Madagascar, Malawi, Mozambique, United Republic of Tanzania, and Zambia

The Costed Action Plan of the SADC Industrialisation Strategy and Roadmap 2015 -2063

Approved by Summit in March 2017, identifies six priority value chain clusters namely;

- **Agro-processing (Rice),**
- **Mineral Beneficiation,**
- **Pharmaceuticals,**
- **Capital Goods,**
- **Consumer Goods and**
- **Services.**

Why Rice

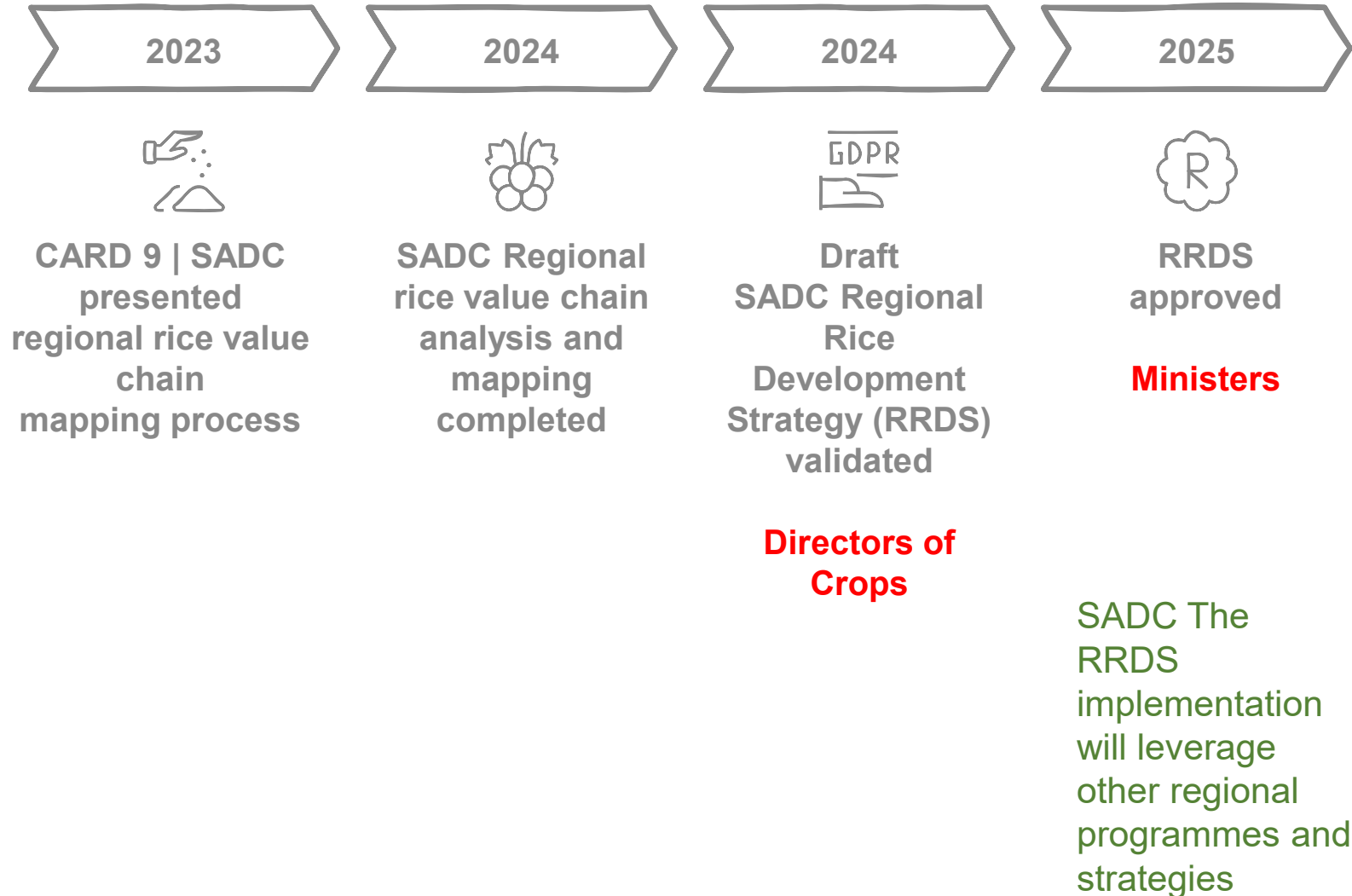
SADC still has a large supply gap:

- **average production 5.3 million MT,**
- **imports 3.3 million MT/year,**
- **demand is projected at 9.6 million MT by 2028**
- **~ 1 billion USD of imports**

Overview of rice sector development in the last 5 years, especially post CARD 9

Since CARD 9, SADC has moved from diagnosis to implementation

Timeline: SADC Regional Rice Development Strategy



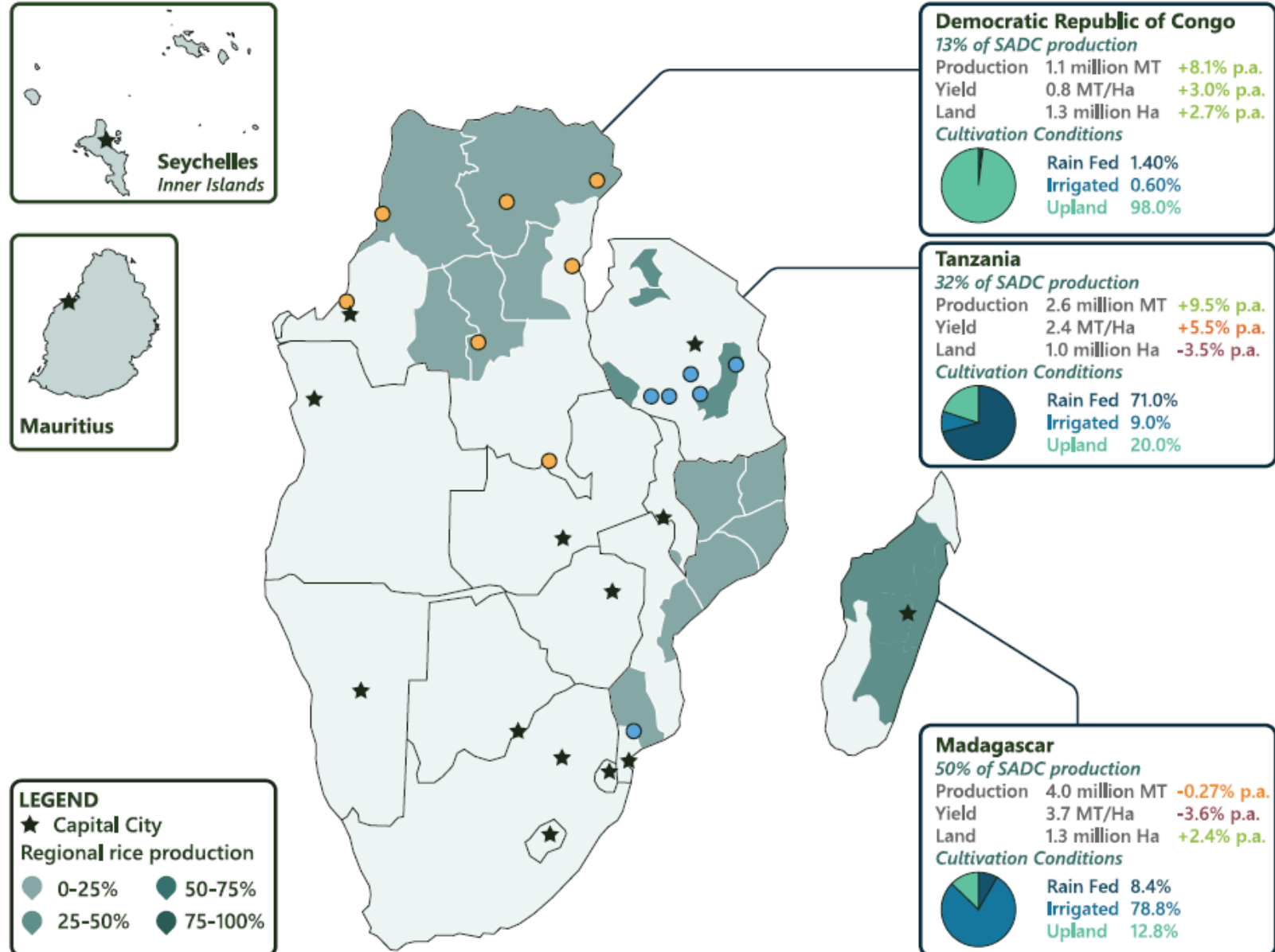
TRENDS AND DEVELOPMENTS IN THE REGIONAL RICE SECTOR DEVELOPMENT

Demand Outpaces Supply, While Production Remains Concentrated Among Leading Producers

95% of SADC rice production is concentrated in Madagascar, Tanzania and DRC.

Tanzania and DRC show improving production and yields, while Madagascar remains large but volatile.

Consumption is rising strongly, especially in DRC, Tanzania, Mozambique and Angola.





Enabling Systems in place to support Market Transformation through the recently approved RRDS

- **Unified Strategy:** Approved Regional Rice Development Strategy (RRDS) 2024 provides a dedicated roadmap for regional self-sufficiency.
- **Structural Alignment:** Projects are grounded in the Regional Agricultural Policy and the Regional Crop Development Programme (RCDP 2019).
- **Research:** The Regional Centre of Leadership in Mozambique has promoted high-yielding varieties such as **Kayanjamalo, Katete** and **Mpatsa**.
- **Seed Trade :** The Harmonized Seed Regulatory System (2024) enables seamless movement of high-yield varieties via a single regional label.
- **Climate Smart Mechanisation:** Sustainable Agricultural Mechanization for Climate Smart Agriculture (SAM4CSA) Roadmap (2025): adoption of climate-smart machinery.
- **Production Support:** Regional Fertilizer Programme (2023) and Strategy on Plant Health (2019) to stabilize yields.
- **Efficiency Gains:** The Post-Harvest Losses Strategy (2025) targets the 20% loss gap through modern drying and storage infrastructure.
- **Quality and value addition:** Rice quality and value addition examples already exist, including branded aromatic rice and improved parboiling models in Madagascar and Mozambique.

SADC Rice Value Chain: Opportunities and Challenges

Strategic Opportunities

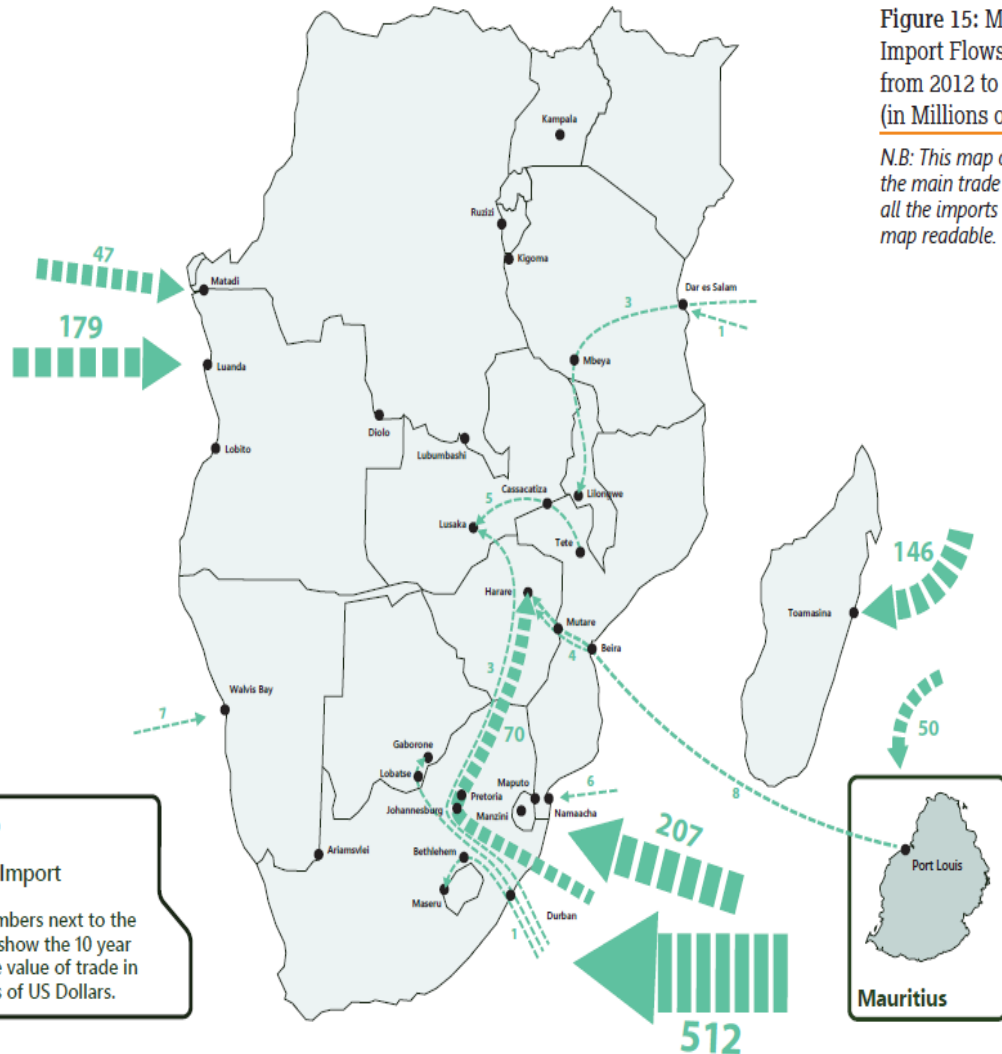
- **Market Pull:** Consumption surged by 260% over the past 15 years, led by DRC, creating a massive regional pull for localized supply.
- **Import Substitution:** Replacing the current 43% import dependency offers a billion-dollar strategic and commercial opening.
- **Yield Potential:** Doubling productivity from 2 MT/ha to the 4.6 MT/ha global average allows growth without land expansion.
- **Economic Clusters:** Mapping identifies cross-border nodes in the Dar es Salaam-Mbeya and Zambezi corridors for integrated processing.

Structural Challenges

- **Technical Gaps:** Low mechanization, aging irrigation, and limited certified seed access limit smallholder output.
- **Quality Losses:** Regional competitiveness is undermined by 20% post-harvest losses and high breakage rates (~50%).
- **Climate Risk:** Volatile production cycles in Madagascar and Mozambique are exacerbated by increasing natural disasters.

SADC Rice Value Chain: Opportunities and Challenges

Imports



Potential Regional Industrial Clusters

Figure 19: Potential rice clusters map and cluster development priorities

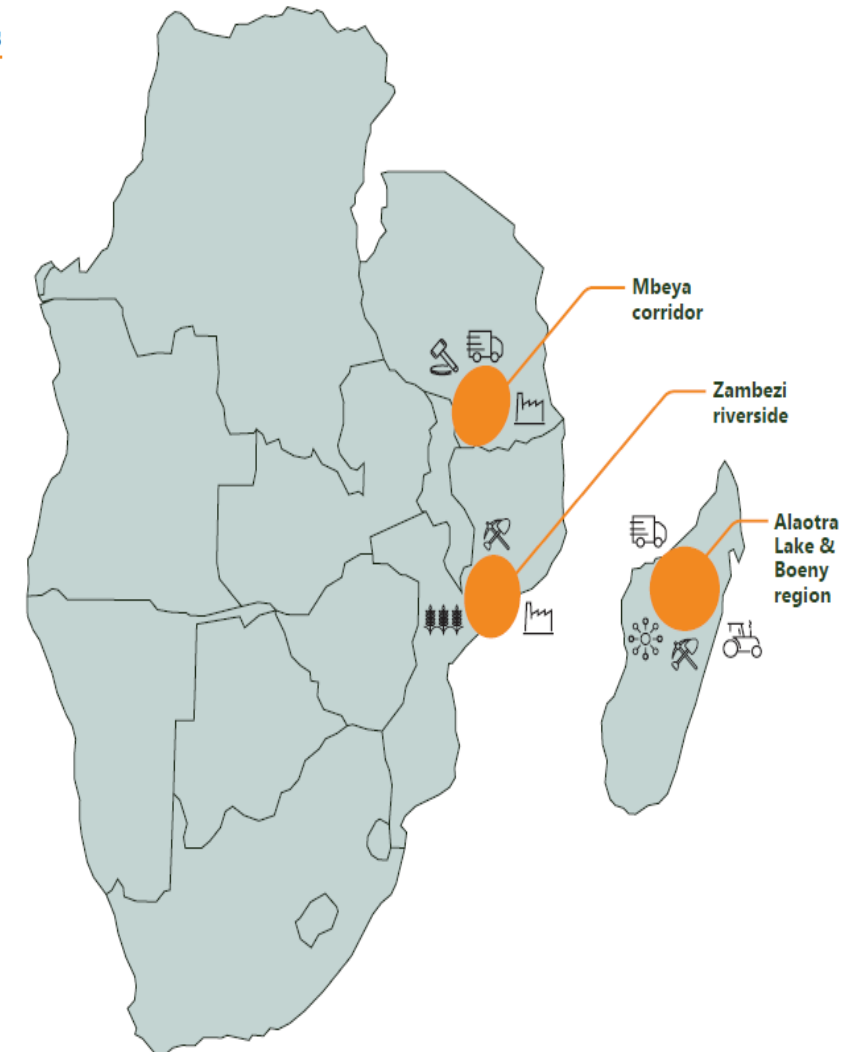
Source: Based on Study Findings

LEGEND

- Potential cluster
- Existing cluster

Cluster development priorities

- Regulatory framework revision
- Transport infrastructures development
- Technology upgrading / post harv handling improvement
- Processing capacity increase
- Producers organisations support / market mutualisation
- Irrigation infrastructure development / renovation
- Productivity increase
- Finance services
- Large scale mechanisation



Initiatives/Mechanisms To Boost Coordination, Management and Feedback Between National and Sub-regional Level

SADC's Existing Institutions Provide the Platform for Implementing the Recently Approved RRDS

- **Decision-Making and Governance:** The Joint Meeting of SADC Ministers responsible for Agriculture and Food Security, and Fisheries and Technical Committees.
- **Operational Investment Framework:** The **Regional Agri-food systems Investment Plan (RAIP) 2023–2030** serves as the primary coordination mechanism, aligning National Agricultural Investment Plans (NAIPs) with the Kampala Declaration's focus on resilient agri-food systems and agro-industrialization.
- **Management and Feedback Loops:** A **SADC Regional Crops Officer** link the Secretariat to National Lead Industry Associations, while the **Regional Agricultural Information Management System (AIMS/RAIMS)** provides real-time, multilingual data to monitor production shocks and market performance.
- **Regulatory & Research Initiatives:** The **SADC Harmonized Seed Regulatory System** and the **Regional Centre of Leadership in Mozambique** and the Centre for Coordination of Agricultural Research and Development for Southern Africa (CCARDESA)) accelerate the cross-border transfer of high-yielding varieties to boost productivity from 2 MT/ha toward the global average of 4.6 MT/ha.
- **Strategic Technical Support:** Through **Support Towards the Operationalization of the SADC Regional Agricultural Policy (STOSAR II)** funded by the EU and FAO, the region strengthens market access and transboundary pest management, ensuring that national projects (e.g., in Angola, Tanzania, and Zambia) remain visible and supported at the sub-regional level.

Continental and Regional Roadmap: Rice Trade and Industrialization

Explore the AfCFTA and the Tripartite to build a regional rice market before defaulting to Asian imports.

Linking RECs to the AfCFTA Market

- **Continental Trade Integration:** Prioritize intra-REC and inter-REC trade via AfCFTA preferences; implement a "no sudden bans" protocol to allow surplus hubs (e.g., Tanzania) to stabilize deficit markets across SADC, EAC, and ECOWAS.
- **Global Competitiveness:** Harmonize regional grades and labeling standards to protect local value chains from low-quality global dumping, ensuring African rice achieves "**shelf-parity**" with international brands.
- **Agri-Food Resilience:** Scale the SAM4CSA framework across corridors to reduce the 20% post-harvest loss through shared drying, storage, and climate-smart irrigation technologies.

Investment and Coordination: Scaling Bankable Regional and Continental Rice Value Chains

- **Industrial Hubs:** Incentivize medium-to-large milling clusters in strategic cross-border corridors (e.g., Mbeya, Zambezi) with modern parboiling and by-product utilization to drive regional structural transformation.
- **Bankable Pipeline:** Convert regional strategies into a rolling pipeline of PPP-ready projects (irrigation, logistics, hubs) for a Continental Investment Forum involving DFIs and private equity.
- **Integrated Governance:** Sync RECs Market Information Systems with continental data platforms to track stocks and pest alerts, using quarterly scorecards to align national actions with RECs and CAADP/Kampala targets.

SADC Regional Coordination: Trade, Seeds and Feedback Systems

Addressing Regional Trade Issues & Barriers

- **Regulatory Integration:** Implementing the **SADC Regional Rice Development Strategy (RRDS) 2024** to harmonize SPS standards and simplify border procedures, aligning with **AfCFTA** and **RECs** protocols to enable a "no sudden bans" trade environment.
- **Trade Facilitation:** Leveraging regional transport and logistics infrastructure and one-stop border posts to reduce transit costs; collaborating with **COMESA** and **EAC** through the Tripartite framework to eliminate NTBs

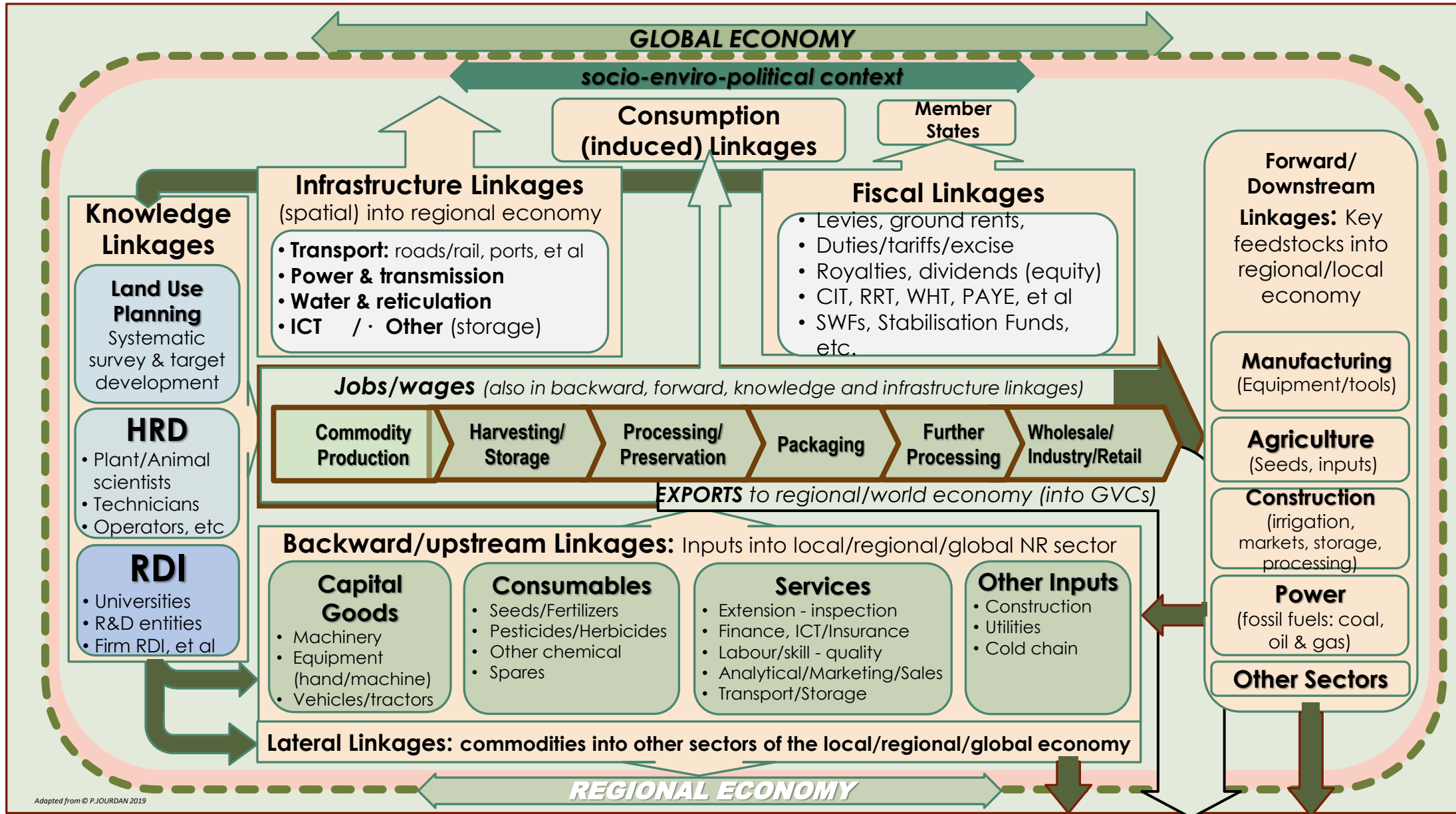
Regional Distribution of Improved Rice Seed

- **Seed Market Integration:** Operationalizing the **SADC Harmonized Seed Regulatory System**; over 115 varieties are now registered, enabling seamless cross-border movement of certified, climate-resilient seeds.
- **Research Diffusion:** Utilizing the **Regional Centre of Leadership (RCoL) in Mozambique** and **CCARDESA** to accelerate the multiplication and distribution of high-yielding varieties to CARD member countries (Angola, DRC, Madagascar, Malawi, Tanzania, Zambia).

Sector Development Feedback: RECs and Member States

- **Evidence Base for Decision Making:** Using the **Regional Agricultural Information Management System (AIMS)** and **RAIMS** to provide real-time feedback on production, stocks, and trade flows between the SADC Secretariat and National Focal Points and other RECs.
- **Accountability Frameworks:** Institutionalizing **Annual Review Meetings** and **Quarterly Scorecards** to monitor RRDS implementation progress, ensuring national investment plans (NAIPs) remain aligned with regional and continental **CAADP/Kampala** targets.
- **Stakeholder Platforms:** Leveraging the **CARD Regional Steering Committee** linking with the **SADC Rice Officer** as interactive feedback hubs where **MEMBER STATES, THE PRIVATE SECTOR, AND RECs EXCHANGE BEST PRACTICES AND RESOLVE BOTTLENECKS.**

Holistic, Market-Driven, Profitable, Inclusive, and Sustainable Rice Value Chain Through Fit-for-Purpose Roles Among Actors and Comparative Advantage Across Member States





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ASANTE SANA

MERCI BEAUCOUP

MUITO OBRIGADO

THANK YOU

