



MEETING REPORT

THE EIGHTH GENERAL MEETING OF THE COALITION FOR AFRICAN RICE DEVELOPMENT

VIRTUALLY ORGANIZED

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Co-chair's Summary of Eighth General Meeting of CARD

The eighth meeting of CARD's stakeholders was held online between 6th and 7th of October 2021. The meeting was attended by focal points and representatives from 32 CARD member countries, CARD steering committee members, and South-South Cooperation partners. Through a hybrid mode, the representatives and focal points of the member countries participated together from a physical location at their respective countries.

While the main objective of the meeting is to share information on the progress of CARD activities especially the preparation and implementation of the national and regional rice development strategies, in the member countries; intensive discussions on designing a comprehensive framework for monitoring and evaluation and how industrialization could help advance rice sector in African context were also aimed at.

The sessions were chaired by two SC members (Dr. Boladale Adebawale, ECOWAS on behalf of Mr. Alain Sy Traore, and Mr. Abdi Nur, IsDB) and a country focal point (Eng. Anna Mwangamilo, Tanzania). The meeting acknowledged that the goal of re-doubling rice production during the second phase of the CARD initiative is very pertinent in addressing the rising consumption demand and in reducing the import dependence for rice in Sub-Saharan Africa.

The meeting observed that a 70% increase in area under rice cultivation and 17% increment in yield levels contributed to achieving the CARD's goal of doubling rice production in SSA; from 14 million tons to 28 million tons during its first phase (2008-2018). Since continuation of such rapid expansion of area under rice cultivation may not be feasible during the second phase (2019-2030); the meeting proposed that CARD shall emphasize more on enhancing on-farm productivity. Improving smallholder rice farmers' access to technologies and critical inputs such as water, seeds, fertilizers, finance, and appropriate machineries should therefore serve as one of the main enablers.

CARD has also embraced a R.I.C.E approach that involves building **Resilience** in production and supply, promoting **Industrialization** along the rice value chain, sharpening **Competitiveness** of local rice, and reinforcing **Empowerment** of all its stakeholders inclusive of women and youth along the rice value chain. The meeting asserted that the R.I.C.E approach will render sustainability to the impacts of doubling the rice production in Africa.

Stakeholders hence need to help African governments make sensible prioritization and set realistic targets in increasing rice production. In this context, one of the major deliverables of the CARD initiative is to establish National Rice Development Strategy (NRDS) in member countries. NRDS not only sets out the targets and approaches, but also serves as a narrative for policy directions for rice value chain development in CARD member countries.

To further integrate the rice sector development in the continent, the second phase of CARD additionally guides regional economic communities (RECs) in preparing and implementing Regional Rice Development Strategy (RRDS) and generates synergies in investments and resource utilization amongst member countries.

GM8 assessed the progress made in (1) developing and implementing NRDS in member countries and (2) developing and implementing RRDS in ECOWAS and EAC region. The meeting also deliberated quite extensively on a new ‘monitoring and evaluation’ framework for the CARD initiative. In addition, the GM8 held two separate panel discussions on (a) the implications of RRDS and (b) the prospects of industrialization of the rice value chain in SSA. The outcomes of these sessions shall be briefly summarized as follows: -

1. Progress in preparing and implementing National Rice Development Strategy (NRDS):

With the induction of 9 new countries under the second phase, the CARD’s membership now includes 32 rice growing African countries. Since the launch of the phase 2, the CARD activities

were therefore directed at **revising the NRDS that had expired** in the veteran member countries and at **preparing the NRDS afresh** in the new member countries.

Despite the devastating impacts of COVID-19 pandemic on the logistics and regulations in arranging face-to-face meetings with NRDS taskforce members and Ministry officials in the member countries, CARD was able to successfully provide technical assistance in drafting and validating the NRDS (often referred to as ‘second-NRDS or NRDS-II’) in 16 member countries. NRDS preparation in 5 other member countries are in the final stages, and are waiting for the approval by the governments.

Through their NRDS-II, most of the CARD member countries have set **achieving self-sufficiency in rice production** as their goal. This trend reflects the increasing pressure of rice importation on the governments and the growing importance of ensuring food security through **rice-based food systems**.

As alluded earlier, the NRDS-II of several member countries acknowledges the challenges in sustainably expanding the area under rice cultivation and hence largely prioritize on enhancing on-farm productivity through facilitation of access to appropriate inputs and technologies.

In those member countries where the NRDS-II has already been validated, the implementation has begun through on-going rice-related projects and new budget allocations from the government and development partners on distribution of inputs (such as seeds and fertilizers).

2. Progress in preparing and implementing the Regional Rice Development Strategy (RRDS):

The meeting acknowledged that the ultimate purpose of RRDS shall be to **streamline the rice value chain developmental activities and markets** within a given regional economic community (REC). Given the importance of rice in food security and trade, almost all the RECs in Africa have expressed interest in joining the second phase of CARD as its SC members.

These include East African Community (EAC), Common Market for Eastern and Southern Africa (COMESA), Economic Community of West African States (ECOWAS), Economic Community of Central African States (ECCAS), and Southern African Development Community (SADC). While RECs such as COMESA, ECCAS and SADC are yet to begin the process of setting up their RRDS; ECOWAS and EAC have started making significant progress in preparing their RRDS.

The strategic framework for rice value chain development in the ECOWAS region is narrated through its 'Rice Offensive' program. ECOWAS aims to achieve regional self-sufficiency in rice production and has drawn out an action plan for a five-year period, 2020-2025. The meeting observed that besides CARD, other agencies such as CARI/GIZ, AGRA, BMGF and other partners are also involved in the implementation of ECOWAS' strategies on rice sector development.

ECOWAS is planning to institutionalize the implementation of its strategies through '**ECOWAS Rice Observatory (ERO)**'. Housed within the ECOWAS commission at Abuja, Nigeria; the ERO will coordinate investments and offer policy recommendations to key decision-makers. ERO will be governed by a board comprised of development partners, institutions and national chapters. The national chapters will align the aspirations of NRDS in member countries.

EAC has started the process of designing their RRDS by first setting up an EAC Regional Rice Platform (ERRP) that includes representations from both public and private sectors. CARD has provided technical assistance to the platform members in analysing the strengths, weaknesses, opportunities and threats to rice sector development in member countries and the region at large.

EAC intends to focus on improving the **on-farm productivity and regional trade** through improved coordination of research, policies and investments along the rice value chain. Through further technical and financial support from CARD and other development partners, the EAC's rice development strategy (EARDS) is expected to be drafted and validated by 2022.

3. Monitoring & Evaluation Framework

Although CARD was able to achieve its overall target of doubling rice production in its first phase; one of the key lessons learnt from its performance evaluation exercise was lack of a clear set of indicators that could help track the progress of NRDS implementation at country- and regional levels.

In consultations with steering committee members and NRDS taskforce members of its member countries, the CARD Secretariat developed and presented a new M&E framework at initiative-, regional- and country levels. It consists of a common set of indicators for tracking the **overall** progress of the CARD at all the three levels. These include (1) total paddy production, (2) area under rice cultivation, (3) average yield from across the ecosystems, and (4) rice self-sufficiency rate.

In addition, a separate set of two indicators each under the four (R, I, C and E) components are included for tracking the progress on NRDS and RRDS implementation at the country and regional levels. These include (R-1) area under irrigation, (R-2) quantity of seeds of resilient rice varieties produced, (I-1) industrial milling capacity, (I-2) mechanization level in rice production, (C-1) share of local rice in the mainstream markets, (C-2) quantity of seeds of high yielding varieties produced, (E-1) smallholder farmers' accessibility to financial services, and (E-2) smallholder farmers' accessibility to training and technical services.

CARD Secretariat also presented an operational plan for tracking the indicators at country level and cumulatively at regional and continental level. The plan will rely on collection of secondary data from FAO and national bureaus of statistics and line ministries, and primary data by engaging enumerators (where necessary) for setting baselines and tracking the targets under each indicator.

Through an **annual review** meeting at country level, the taskforce members will assess the progress made under the M&E framework and feed the validated data onto the CARD website for wider-sharing. CARD Secretariat sought additional funds from SC members and other stakeholders for the purpose of monitoring and evaluation.

The meeting expressed some concerns on the availability of primary data, methodologies, technical and financial support for data collection. The meeting also raised some reservations on the reliability of ‘share of local rice’ and ‘industrial milling capacity’ as indicators; and requested the CARD Secretariat to reexamine before finalizing them. By and large, the meeting appreciated the efforts made by the CARD Secretariat and approved the CARD’s new M&E framework.

4. Panel discussions

4a) Regional Rice Development Strategy

Given the insufficiency in local rice production, regional economic blocs in Africa are facing challenges in regulating the trading of rice from both within and outside their region. One of the objectives of the second phase of CARD was to streamline and attain synergies amongst the rice value chain development activities in CARD member countries in the regional economic communities (RECs). CARD provides technical and financial assistance in drawing and implementing a roadmap in alignment with the overarching vision of the RECs on integrating the national economies and markets.

A group of panelists deliberated on the progress and significance of developing and implementing the RRDS towards the goal of doubling rice production in Africa. The discussions concluded that (1) the RRDS should help member countries build synergies on rice value chain development, and thereby help achieve the targets set under their NRDSs, (2) reforms leading to increased movements of capital (public and private investments) and technologies (including seeds, machineries) can help regional economic blocs ‘integrate rice development and trade’ amongst member countries and the rest of Africa, and (3) CARD and other development partners should help those RECs that haven’t yet developed their RRDS prepare by 2022-23, through technical and financial assistance.

The meeting asserted that engagement of RECs in developing and implementing RRDS shall open new vistas in rice production, investments, trade and policies in Africa.

4b) Promoting industrialization along the rice value chain

Industrialization is an important element of CARD’s R.I.C.E approach. It implies engagement of rural and urban enterprises (small, medium and large) in production, processing, value addition and marketing of the locally produced rice in CARD member countries. The panel discussions at GM8 focused on how industrialization could help transform the rice sector in Africa.

The panelists concluded that (1) industrialization would imply enhancement of the competitiveness of locally produced rice through higher productivity, quality enhancement, job creation and wider socio-economic transformation, (2) lower scale of economies (production, aggregation and processing), inadequate private investments and insufficient financing mechanisms for private sector act as major bottlenecks for industrialization, (3) these weaknesses could be addressed through political will, infrastructure upgrading, incentives, productivity-enhancing technologies, building skills, and (4) a holistic integration of value

chain actors from across the food systems and other economic sectors will make the industrialization more effective, resilient, inclusive and sustainable.

5. Other activities of CARD

Besides providing technical assistance in preparing and implementing the NRDS and RRDS in member countries, CARD Secretariat successfully organized a **webinar** on the impacts of COVID-19 on rice value chain development and competitiveness on 25th of February, 2021. The webinar was opened by Hon. Minister Gaoussou Toure, Ministry of Rice Promotion, Cote d'Ivoire and attended by about 250 participants.

In partnership with IRRI and Agriculture Policy Research in Africa (APRA), CARD engaged NRDS task force members from Eastern Africa at **East Africa Rice Conference 2021**. The conference provided an opportunity for the taskforce members to discuss and share experiences on the challenges and emerging opportunities in rice sector development and efforts that will be required ensure adequate domestic production to fulfill the ever-increasing demand for rice.

CARD also partnered with IRRI and engaged NRDS taskforces from member countries in an independent dialog under **UN Food Systems Summit** (UNFSS). The dialog brought together a range of stakeholders across the food system, from producers to value chain actors, consumers and policymakers, to respond to the challenges in building sustainable rice value chain in a post-COVID 19 context.

Way Forward:

CARD will improve coordination developmental activities along the rice value chain in all the member countries by engaging CARD-SC members and other development partners at country level. CARD will provide technical assistance to taskforce members in those countries where NRDS is not yet prepared and validated. In countries where NRDS-II is already validated, CARD

will assist taskforce identify gaps in funding and develop bankable project concepts, the execution of which will lead to concrete implementation of the NRDS-II at country level.

At regional level, CARD will work closely with ERO Secretariat and develop projects, build partnerships, and mobilize resources for ECOWAS' regional action plan. CARD will extend technical assistance to EAC Secretariat in preparing and validating East African Regional Rice Development Strategy (ERDS). Upon validation, CARD will support East African Rice Platform in developing project concepts for implementing the ERDS. With additional financial support from SC members and other development partners, CARD will support COMESA, ECCAS and SADC in preparing a roadmap for rice development in their respective regions.

CARD will review the new M&E framework based on the suggestions made at the meeting. By engaging the NRDS taskforce members in each member country and region, baselines and targets for indicators (Overall and R.I.C.E.) will be set in accordance with the aspirations of the NRDS and RRDS respectively. Where necessary, enumerators will be engaged for setting the baselines and tracking the progression at periodic intervals. CARD will also organize annual review meetings in member countries to apprise the progress on implementation through the M&E framework. The results will be shared with the stakeholders to make informed decisions to gear and sustain NRDS implementation in member countries.

The meeting vowed to strengthen partnerships amongst African governments, private sector, Steering Committee members, South-South Collaboration partners, regional economic blocs and other development partners and institutions towards achieving the CARD's goal of re-doubling rice production in Sub-Saharan Africa.

Minutes from Sessions at GM8

Formal Opening

Dr Yusuke Haneishi, General Coordinator, CARD secretariat, welcomed all the participants to the meeting and presented the agenda for approval by the participants. The meeting started with a minute of silence in honor of Mr Kenzo Oshima who passed away this year. Late Mr Oshima, a former Under Secretary General of the United Nations and a former Senior Vice President of JICA, was a co-founder of the CARD initiative.

Opening remarks by Dr. Agnes Kalibata, Director, CARD Secretariat

In her opening remarks the CARD Director thanked the CARD secretariat for organizing the 8th GM. She commended the vision of the founding fathers of the initiative and paid a glowing tribute to Mr Kenzo Oshima. According to her it is quite commendable that all participants are coming together to move the initiative forward and to take stock since the beginning of the 2nd phase, she commended the initiative for being a tool to harnessing the countries' potentials leading to doubling rice production in the 1st phase, thus making rice sector as one of the fastest growing sectors in the continent. She pointed out that in spite of the remarkable progress made during CARD phase 1 rice self-sufficiency still eludes most African countries and thus the objective of further doubling rice production during the second phase is a welcome development. Dr. Kalibata noted that attaining the objective require concerted efforts around the rice value chain to ensure that the Africa continent become a region of self-sufficiency in rice production, and therefore it is encouraging to note that CARD has started engaging the regional commissions to ensure coherence in development efforts, investments and trade policies. She opined that lessons learnt from the first phase has emphasized the need to strengthen coordination of efforts of the various development partners at country levels. According to her the setting up of the M & E framework by CARD will help check progress made in the rice sector in member countries. She noted that the COVID-19 pandemic has put an enormous pressure on the global supply chain of the commodity resulting in decrease of flow of rice from Asia by 30% and price increase by 22%. She emphasized that this will provide an opportunity for Africa to improve on the competitiveness of the rice sector and significantly reduce imports. She concluded her remarks by challenging the participants to come up with ways to improve the rice sector as part of the general food systems.

Overall Progress of CARD

In his presentation, the CARD General Coordinator explained that the objective at the inception of the initiative was doubling of rice production in Africa within ten years (2008-2018). Significant progress was recorded in this regard in that out of the over 300 projects generated in the rice sector, about 172 projects are labeled as CARD related which saw an increase in rice production from 14 MMT in 2008 to 28 MMT in 2018. This achievement gave rise to CARD progressing to phase 2 which started in 2019 with the objective of further doubling of rice production to 56 MMT by 2030.

Progress on NRDS-2 Formulation

Sixteen member countries have completed the formulation or revising their NRDS and got approved by their respective governments, while about 5 countries are waiting for the finalization and approval by their respective governments. CARD was a major contributor to the processes of formulating the NRDS. CARD has also contributed to capacity building of actors along the value chain with trainings taking place mostly in the continent. As a way of contributing to alleviating the negative impacts of the COVID-19 pandemic, CARD prepared a policy brief note to guide the various governments on ways and measures to tackle such impact. Early in 2021, CARD organized a webinar on improving competitiveness of local rice in the continent with 230 participants. As a part of information sharing, the CARD secretariat prepares and shares newsletters quarterly with 1,200 subscribers.

Progress on NRDS Revision

Republic of Niger and Rwanda made presentations on the progress made thus far in their NRDS revision processes.

In his presentation, Mr. Aliou Kouré, Director General of the Ministry of Agriculture of Niger, pointed out that rice is a staple crop in Niger and that production stood at 86,000 MT of paddy at the inception of CARD in 2008. This he pointed out was not enough to meet the domestic demand and that a whopping 165 billion CFA Francs was committed annually to import the short falls. The performance of the rice sector showed a significant increase reaching 155,585 MT in 2018. The presenter outlined the vision of the NRDS-2 which is to meet national demand, improve food and nutritional security and reduce rice deficit by 2030. In order to achieve this objective, he presented two scenarios including achieving rice self-sufficiency by 2025 and starting export by 2030. He pointed out that by 2025 assuming without NRDS land area of 33,907 ha will be cultivated resulting in production of 127,861 MT; whereas with NRDS in the same year a land area of 198,507ha will be cultivated with a paddy production of 886,056 MT. Achieving this goal will bridge the gap currently experienced in rice consumption, however, targeting export in 2030 means a second scenario will be pursued. Assuming without NRDS by 2030 the country will be cultivating a meager 36,000 ha with production of 146,400 MT, while with NRDS an area of 252,507 ha will be cultivated giving rise to production of 1,458,059 MT. This will give rise to a surplus of 258,045 MT which could be exported. In order to achieve the above objective, the NRDS is designed with three components in focus i) improving production system resilience and increasing production levels, ii) making high quality, competitive local rice available to the market, and iii) strengthening the work force and improving organization across regional rice value chain. According to him, the institutional setup for implementation of the Nigerien NRDS consists of i) consultative committee ii) national steering committee and iii) communal commission for rural development. He acknowledged that the NRDS is in line with the government's willingness to coordinate policies and strategies along the value chain and that the expected result will depend on the government's political will to mobilize human and financial support for implementation.

Director General for Value Chain Management and Trade of the Ministry of Agriculture of Rwanda, Mr. Octave Nshimiyimana presented progress made in NRDS revision. Rwanda has irrigation potential of about 500,000 ha and about 123,000 ha is identified as potential marshland suitable for rice production; however, only 64,000 ha is currently under cultivation. The main aim of the NRDS-2 is to drive the rice subsector towards achieving self-sufficiency by increasing productivity and market competitiveness of locally produced rice. The NRDS-2 is aligned to the four pillars of Rwanda's Program for Sustainable Transformation of Agriculture (PSTA-4) which include i) innovation and extension, ii) productivity and resilience, iii) inclusive market and value addition, and iv) enabling environment and responsive institutions. The NRDS-2 will be facilitated by a task force and coordinated by MINAGRI. A national rice stakeholders forum will be established which will be instrumental in priority setting and implementation of interventions. The presenter pointed out that the task force will work on mobilizing financial resources from both internal and external sources based on the concept notes already developed.

Briefing from New Member Countries

Eight new member countries of the CARD initiative presented a brief on their country's rice sector

Angola (presentation by Eng. Carlos Francisco Canza): Rice is the second most important cereal crop in Angola. While consumption is about 450,000 MT/annum the country produces only 10,000 MT with a deficit of 440,000 MT. A major challenge is the need to produce 50,000 MT/year and to revitalize the local seed production. Technical support of JICA is presently helping to overcome this challenge. Some of the priority intervention areas will aim to rehabilitate the irrigation infrastructures, to increase the cultivation areas, to bring in more milling machines and to organize producers into cooperatives. The major stakeholders are public sector, private sector which is beginning to play an active role, banks and development partners. They expect CARD to help facilitate the flow of information about good production systems of other countries

Chad (presentation by Dr. Moundibaye Dastre Allarangaye): Cereals represent 60.5% of total volume of food consumed in the country, 10% of which is rice. Average paddy production over the last decade is 238,505 MT, and production is mainly driven by rainfall. A major challenge is that yields are very low despite state's investments while imports keep increasing. Chad has large expanse of land areas and water bodies which provide opportunities to increase production. One of the major objectives is to produce 1,431,180 MT of paddy by 2030. To achieve this, priority intervention areas will aim to i) strengthen and ensure the control of inputs, production development and mechanization, ii) support the marketing of paddy, and iii) support the competitiveness of locally produced rice. The stakeholders in the rice value chain include research that generates technologies, private sector, and development partners. CARD is expected to help organize meetings with technical and financial partners for the development of concept notes and also help strengthen the capacity of the task force members.

Congo Republic (presentation by Mr. Hidulphe Modeste Malanda): Congo has an enormous agricultural potential (340,000 ha of irrigated land) but is unable to meet the agricultural product needs of its population. These needs increase from year to year due to population growth and changing diet habits. Among the most demanded products, rice occupies an important place. However, the level of production is very low and local production covers only 6.4% of demand. This situation is explained by the very low level of modernization and intensification of production systems. This is why Congo intends to increase the level of rice production to double the rate of coverage of rice needs by local production in 2030 (75,000 tons). Thus, with the support of CARD and the involvement of all stakeholders, the country intends to finalize its NRDS and develop concept notes for its implementation. To achieve the objectives of the NRDS, the priority actions will focus on: (i) improving access to quality inputs (seeds and fertilizers), (ii) the promotion of mechanization and irrigated rice cultivation, (iii) promotion of the modern rice processing respecting the standards of quality and (iv) on the reinforcement of the technical and organizational capacities of the actors.

Gabon (presentation by Mr. Rolexin Ngangori Adamas): Gabon has a long history of growing rice but supply remains lower than demand. Hence the government has decided to have rice as one of its priority crops, because rice imports consume about 8 billion CFA Francs per annum. Major challenges include need to improve the rice farming systems in the face of climate change and population growth, promoting industrialization and competitiveness of the rice sector. However opportunities abound in the country with the availability of over 4 million hectares of arable land and a good rainfall regime. The specific aim of the NRDS is to promote rice production to reach 130,000 MT by 2030 and structure and organize the sector. Priority areas include setting up of rice farming areas (irrigated and rainfed), implementation of a seed system, mechanization of rice farming and creating a necessary post-harvest conditions to ensure the availability of local rice in the market. The stakeholders in the rice sector include the public, private and financial and technical development partners. Their expectations from CARD include the facilitation of the creation of a donor advisory group to financially support the strategy, facilitation of a south-south trade and reinforcement of the task force members in advocacy and monitoring/evaluation capacity.

Guinea Bissau (presentation by Mr. Suanda Infonda): Rice represents 75% of the food consumption of the country with a per capita consumption of 130kg/person/year. Local production only covers 55% of consumption while the gap is filled by import costing the country 36 million USD per year. Major challenges of the sector include low productivity, inappropriate post-harvest processing, and weak linkages among the value chain players. However, opportunities abound some of which are large expanse of land suitable for rice production, available water resources for irrigation, and the existence of political will to promote rice production. The specific aim of the NRDS will be to increase production from 180,768 MT to 505,000 MT by 2030 and increase the average yield from 1.8 t/ha to 5 t/ha while also increasing the number of industrial processing units from 2 in 2019 to 20 in 2030. Priority intervention

areas will aim to improve the production systems and promote industrialization, commercialization, competitiveness and the involvement of the private sector. Stakeholders in the sector include public sector, private sector and development partners. Their expectations from CARD include support for the finalization and implementation of the NRDS, and establishing a more effective organization for the sub regional market.

Burundi (presentation by Eng. Jean Claude Mbarushimana): Rice is a strategic crop which is key to food security of the country. However, there abound challenges in rice production some of which include insufficient local production to meet the requirements despite huge potentials and also poor promotion of the locally processed rice. Large expanse of land for production and availability of water for irrigation provide opportunities which can be harnessed to overcome the challenges. The major aim will be to promote the production and sale of rice to improve food nutrition and boost national economy by cultivating 80,601 ha of land with output of 403,005 MT by 2025. The priority intervention areas include developing land and roads for rice farming, supporting the seed sector and promoting the use of fertilizers. Key stakeholders in the sector include public, private, NGOs and development partners. Their expectation from CARD includes technical support to finalize the NRDS.

Malawi (presentation by Mr. Martin John Kausi): Rice is the second most important crop in Malawi after maize. About 85% of the rice cultivated is under rainfed lowland, while 10% and 5% are under irrigation and upland respectively. Rice is mostly cultivated by smallholder farmers with an average yield of 1.2 t/ha as against potential of 5 t/ha. Factors limiting the sector development include limited access to improved seeds, low fertilizer use, damaged irrigation infrastructures and limited access to technical support. However, opportunities abound that could lead to increase rice production such as, availability of large water bodies for irrigation, subsidies on seeds, availability of local and regional markets, and the willingness of the commercial banks to fund the sector. The aim of the NRDS is to increase paddy yield per unit area in irrigated schemes and also to increase both area and yield in rainfed ecosystem to meet both domestic and export demand. The stakeholders in the rice sector include public, private and development partners. Their expectation from CARD includes sharing experiences and knowledge from other countries that have achieved great strides in rice production.

Sudan (presentation by Mr. Hag Attwa Elsir Alawad): Rice is a food security crop. Despite the importance of the crop, area harvested does not show any significant increase. Hence the government is promoting the expansion of production areas. The major challenges of the sector include increase in consumption, low availability of certified seeds and lack of improved seed production technology. The opportunities include availability of vast irrigation facilities and human resource for research activities. Goal of the NRDS is to increase rice production for self-sufficiency and export by 2030 through the expansion of area cultivated to 142,866 ha and production to 722,685 MT. Major intervention areas are production and distribution of seeds to farmers, and pursuing innovative technologies from land preparation to post-harvest.

Stakeholders involved in the sector are public, private sector and development partners. Their expectations from CARD include facilitation of human capital development of actors along the value chain as well as facilitating networking among development partners for possible investment in the sector.

Progress on NRDS implementation

Turning to the NRDS implementation agenda, three presentations were made, namely those of Burkina Faso, Ghana and Madagascar.

Burkina Faso: Mr. Gaoussou Sanou, NRDS focal point, representing Burkina Faso, recalled that rice was the fourth cereal both in terms of production and areas. He also insisted on the increasingly important role of rice due to increasing urbanization and changing dietary habits. However, he raised the fact that despite this growing importance, rice production only covers 40% of the needs; which means that the level of imports continues to increase, currently standing at around 650,000 tons. Faced with this problem, the President of the Republic launched "rice initiative" which aims to produce 1 million tons of paddy by 2023. To give substance to this vision, a new rice development strategy (NRDS-2) has been drawn up and validated, and is being implemented. Taking into account the results of the evaluation of the first strategy (NRDS-1) and wishing to ensure synergy of action between the stakeholders in the rice value chain, a Technical Secretariat for the Development of the Rice Sector (STD-RIZ) has been set up. The ST-DRIZ has the heavy task of federating the actors and especially of ensuring a better harmonization of their actions. Thus, according to the presenter, for a greater involvement of the partners in the implementation of the NRDS-2, their involvement was carried out upstream (during formulation of the NRDS-2) putting a focus on their area of interest. For example, FAO plans to support mechanization, AGRA plans to support the promotion of the private sector in the RVC, Taiwanese Cooperation and the IsDB plans to support the value chain, GIZ intends to support the downstream of the RVC, etc. The presenter made recommendations both for the member countries of the initiative and for the CARD steering committee. With regard to the member countries of the CARD initiative, he suggested that they ensure proper involvement of partners upstream of strategy formulation and above all to set up a structure in charge of coordinating the entire rice sector. To the members of the CARD Steering Committee, he recommended that they support the establishment of a functional reporting and communication system, and especially help in the implementation of the NRDS.

Ghana: The Representative of Ghana, Dr. Solomon Gyan Ansah, in his presentation, indicated that rice has become an important strategic food in Ghana and also a cash crop. He said rice consumption is increasing year by year due to population growth, urbanization and the change in consumer diet habits. He went on to mention that an increase in production has been noted over the past ten years due to the establishment of a national flagship program that: (i)

subsidized inputs (seeds and fertilizers), (ii) worked on 'improvement of actions downstream of the sector (trade and marketing), (iii) strengthened extension services and (iv) facilitated the use of digital means for data analysis. He also indicated that within the framework of NRDS II, a new governance structure for the rice sector called the National Rice Coordinating Committee (NRCC) has been set up. This NRCC is made up of sub-committees: a political sub-committee which deals with strategic aspects and a technical sub-committee which deals with operational activities. He indicated that there are many actors in the rice value chain ranging from private actors to public actors through umbrella organizations of different segment of the RVC and partners. He indicated the existence of many projects articulated around the RICE approach of CARD. Among these projects, he recalled the CRAD labeled projects which generally focus their actions around access to seeds and access to finance.

Madagascar: The Representative of Madagascar, Mr. Lantonirina Ramaroson, recalled the importance of rice as well as the good results recorded during the first phase. He indicated that during the second phase while consolidating the achievements, the emphasis will be made on development of 100,000 ha of new irrigation schemes, rehabilitation of 270,000 ha of irrigation schemes, and support for access to quality inputs. Like other countries, Madagascar has a diversity of actors present in the rice value chain, which are mainly institutional actors in charge of agriculture, the private sector, farmers' organizations and technical and financial partners. To coordinate the actions of all these actors, the country has put in place an institutional structure for the implementation of the NRDS consisting of an NRDS steering committee (at the strategic level) and a consultation platform for the implementation of the NRDS implementation of actions in the sector made up of nine colleges (producers, intermediaries, processors, importer/exporter, consumers, administration, researchers, technical support organizations, financial institutions). This institution ensures synergy of the various projects implemented in order to avoid duplication and especially to determine the gaps for their support. The presenter suggested to the other member countries of the CARD initiative to ensure that there is a political will to promote the rice sector, a synergy of action by all stakeholders, and set up a monitoring and evaluation system. For all of this to be effective, sustained support from technical and financial partners is needed.

Support for the development of rice sector at regional levels

Regarding the agenda on "Support for the development of the rice sector at the regional level", it was articulated around two presentations (ECOWAS and EAC) and a panel discussion.

The presentation of the ECOWAS Rice Offensive was made by Dr. Boladale Adebawale on behalf of Mr. Alain Sy Traoré, Director of Agriculture of ECOWAS Commission. During the presentation, Dr. Boladale Adebawale recalled the importance of rice in the sub-region and especially its strong dependence on imports. It was indicated that the rate of coverage of the needs by local production is 60% which

necessitates an import level of nearly 6.2 million tons at a cost of 2.8 billion USD. To reverse this trend, ECOWAS has developed a rice development strategy called the "rice offensive" with the objective of achieving self-sufficiency in the region by 2025. A mid-term evaluation of this strategy, in 2019, showed that although there has been a significant increase in local rice production, efforts still need to be made. This is how a new action plan (2020-2025) was developed. The strategic axes of this action plan are: (i) develop political and regulatory measures to make the rice sector competitive, (ii) set up a financing and public-private partnership mechanism, (iii) ensure better sharing and knowledge management, (iv) ensure effective trade and marketing, (v) ensure the coordination of national inter-professions, and (vi) ensure the coordination and management of the action plan. The cost of the action plan is USD 43.1 million over five years. Its implementation will involve establishment of ECOWAS Rice Observatory (ERO).

Mr. Fahari Marwa, Head of Agriculture and Food Security Department, EAC Secretariat, said that the Governments of the member countries are working towards a monetary union and establish a federation. He indicated that AGRA has supported the financing of CARI East Africa to work within the framework of rice policies. As part of this project, a partnership was established with CARD which resulted in the creation of a regional rice platform and the start of the development of the regional strategy for the development of rice cultivation in East Africa. Currently, within the sub-region a SWOT study has been carried out, the main strategic axes of the strategy is expected by the end of the year.

Panel discussion on 'Regional Program Implementation'

Following the presentations on regional rice development strategies, a panel discussion was organized around the theme: "Regional rice development strategy and its implementation". The session was moderated by Dr. Abdel Ismail, Africa Representative of IRRI and the panelists were: Dr Boladale Adebawale, Mr. Fahari Marwa, Mr. Demba Diallo, Director General in the Ministry of Agriculture of Mali, and Mr. Daniel Njiwa, Head of Regional Food Trade, AGRA.

After introducing the concept of "regional strategy", the moderator emphasized that the increase in demand for rice in African markets must in many ways have attributed to the phenomenon called "globalization". Regionalization is one of the manifestations of globalization. As African markets develop, the regionalization of economies should be seen as an attempt to deal with globalization on the one hand and to perpetuate globalization on the other hand. Whichever the way we look at it, the ultimate goal of regionalization is the integration of the economies of the member countries of the same bloc. ECOWAS and EAC reported on their progress on integrating rice sector development with in their respective regions. But the main question is how to effectively implement the strategy once it has been developed. To this end, ECOWAS is trying to respond to it through the establishment of a unit called the ERO. So he asked to see from the ECOWAS side what the ERO looks like and how it works.

Following a slight change in the agenda, the floor was given to Mr. Daniel Njiwa, Head of Regional Food Products Trade, AGRA to give his point of view, since AGRA is one of the main actors in the implementation of ERO. In his intervention, Mr. Daniel indicated that AGRA is working with ECOWAS for the establishment of ERO because a lot of money is put in the importation of food products. Thus, the strategy of decision-makers is to work to reduce the import bill while improving access to employment for young people and women. In addition, he raised the importance of working to

harmonize policies along the segments in the value chain, to improve quality and above all to promote better involvement of the private sector. From this point of view, AGRA works to bring financial partners in the promotion of the different links of the rice value chain. With regard to the ERO, with the support of AGRA, several partners have joined the initiative such as the IsDB, BMGF, FCDO, WB etc. to set up this structure, which aims to support all stakeholders in the rice sector in West Africa to better coordinate policy, value chain development, financing and R and D to work synergically. Finally, Mr. Daniel pointed out that currently the Executive Secretary of ERO was being recruited.

After the remarks of Mr Daniel from AGRA, Dr. Boladale from ECOWAS, indicated that ERO's vision is "to bring political and financial capital, partnerships, and expertise to achieve rice self-sufficiency in West Africa by 2030 through profitable, resilient, and environmentally sustainable farming and milling enterprises that contribute to rural economic growth, poverty reduction, and women's equity". According to her, ERO is a multi-actor unit that supports the achievement of the regional rice offensive and achieve rice self-sufficiency in West Africa by 2025. One of its main functions is to create a favorable environment for the involvement of the private sector both regionally and nationally.

Following this overview on the ERO, the moderator asked a series of questions to the panelists to get their opinions on the development of the rice regional strategies and their implementation. The questions were: (i) what does the regional rice development strategy intends to bring? (ii) How can we enable the regional strategy to work better and complement the implementation of NRDS? (iii) How to implement regional strategies? What will be the most effective mechanisms and strategies for its implementation? And (iv) How can we help other RECs to develop similar strategies for their region, and what should be the likely roadmap and timeframe?

Responding to the first question to know what the regional rice development strategy intends to bring, the panelists indicated that this allows a better harmonization of policies, in particular trade policies, a pooling of research and development and especially the possibility of having regional projects and programs for the financing of operational actions.

Addressing the issue relating to the functioning of regional strategies and especially to the way in which it can complement national strategies, the panelists indicated that regional strategies can only be implemented at the national level, hence it is important to align them with national policies. Moreover, on cross-cutting issues such as the harmonization of marketing policies, quality standards, regulations, the regional policies can strengthen national strategies. To this, it was emphasized that setting up of regional security stocks and especially the development and implementation of regional programs is paramount.

Regarding the third question, based on the example of ECOWAS, the panelists indicated that the effective implementation of regional strategies could go through advocacy and especially by involving all stakeholders.

For the last question relating to the support of the other RECs in the elaboration of their regional rice development strategies, the panelists invited the donors to support this initiative and to ensure that all the RECs have developed their regional strategy by the end of 2022.

At the end of the panel, a question and answer session was initiated. During this session the main questions asked are:

- 1- If we could share experiences on the best way to provide access to agricultural machinery and equipment?
- 2- How to increase investment in the rice sector?
- 3- How can we help identify, document and make available good practices?

Responding to questions, the panelists indicated that in order to sustainably increase investments, we must work to improve the business environment by reducing risks in the sector, by working to make activities profitable and by reducing intermediation. For access to agricultural machinery and equipment, work must be done to set up cooperatives for the use of agricultural machinery. As for good practices, the reporting system will try to identify and share them through communication tools like the CARD website.

CARD Steering Committee Members' Contribution

Contributions made by three of the CARD-SC members (AfricaRice, AfDB and IsDB) towards attaining CARD's objectives were presented by their representatives at the meeting. These include the following:

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AfricaRice (presentation by Dr. Koichi Futakuchi) has been contributing to each of the elements under CARD's R.I.C.E approach in member countries. Through introduction of flood-tolerant rice varieties (carrying *sub-1* gene) and water-saving technologies, AfricaRice has been strengthening resilience against climate change. By promoting mechanization through private sector, tools such as motorized weeder and postharvest handling machines, AfricaRice helps industrialize local production and become competitive in member countries. Through RiceAdvice (an android-based application) and SmartValley approach, AfricaRice is empowering rice farmers with information, knowledge, and additional incomes. AfricaRice has recently developed Research-for-development Strategy for Africa (2021-25) which covers several indicators set by CARD under its R.I.C.E approach.

AfDB (presentation by Mr. Martin Fregene) has been supporting transformation of rice value chains in several of the CARD member countries such as Burkina Faso, Mali, Gambia, Ghana, Guinea, Guinea-Bissau, Senegal and Sierra-Leone through its Feed Africa agenda. Through various projects, AfDB has conducted e-registration of rice stakeholders and promotion of seeds of high yielding varieties, good agricultural practices, small machineries, processing and marketing to improve competitiveness.

IsDB (presentation by Mr. Momodou Ceesay) has committed investment of 330 million USD in 10 CARD member countries. Through Regional Rice Value Chain program, IsDB aims to help achieve self-sufficiency in West Africa. By initiating procurement process for consultancy services, training and baseline studies, implementation of regional program has been started in Guinea, Gambia, Niger, Senegal and Sierra Leone.

Monitoring and Evaluation Framework for CARD and NRDS Implementation

Dr. Yusuke Haneishi briefed the audience on the M&E framework for the CARD initiative at continental and regional levels. The draft framework was developed through consultations with several stakeholders including the CARD-SC members, NRDS focal points of member countries and RECs. Using

a problem tree methodology, critical issues impeding the progress under each of the four elements of R.I.C.E approach were generated and accordingly categorized. The indicators were identified based on the critical issues that will help track the progress of implementation of the NRDS in member countries and thus the CARD initiative. Dr. Haneishi explained that ‘overall indicators’ such as quantity of rice production, total area harvested, average yield levels, and self-sufficiency rate will help evaluate the progress against the set targets at country-, regional- and continental levels. In addition, two indicators each for Resilience (area under irrigation, quantity of resilient seeds), Industrialization (level of milling sector upgrading, level of mechanization in rice production), Competitiveness (share of local rice in the market, quantity of seeds of high-yielding varieties), and Empowerment (accessibility of smallholder rice farmers to finance and technical services) will be used as metrics for tracking the progress. Dr. Haneishi outlined an operational plan for executing the M&E process. He indicated that the M&E process will rely on the data from sources such as FAO, Ministries of Agriculture and Bureau of Statistics in member countries and spearheaded by NRDS focal points and CARD focal points at country- and regional levels. In this context, Dr. Haneishi informed the CARD-SC members that there is a need for additional technical and financial support for the M&E process. The evidences collected on the progress from country and regional levels will be validated through annual review meetings, and the extent of progress made under each indicator will be shared to wider stakeholders through CARD’s website.

Regarding the agenda relating to the NRDS monitoring and evaluation framework using the R.I.C.E approach, two presentations from Kenya and Côte d'Ivoire showed how at the country level CARD’s new M&E framework could be implemented.

Kenya: Dr. Mary Mutembei, NRDS focal point and Head of Rice Promotion Program at Ministry of Agriculture, Livestock, Fisheries and Cooperatives, Kenya informed the participants that Kenya’s NRDS-2 (2019-2030) aims to achieve rice self-sufficiency by increasing local production by 7-fold. She outlined the various indicators for tracking the overall progress and the four elements under R.I.C.E approach. She indicated that the National Rice Technical Committee (NRTC) will collect data from wards (grassroot level) through sub-county and county administrations in Kenya. Where necessary, the NRTC members will collect data through field visits and Kenya’s National Bureau of Statistics (KNBS). Key challenges in executing the M&E process involve funds, capacity/skills and availability of reliable data.

Ivory Coast: Mr. Yves Dirabou, Director M&E of ADERIZ in Ivory Coast, indicated that during the first phase of the implementation of the NRDS, his country had a monitoring and evaluation system oriented towards Results-based Management. During the development of the second generation of NRDS which is in the finalization stage, the country adopted the monitoring and evaluation system based on the RICE approach of CARD. To track each indicator selected, they determined the baseline as well as the target for 2025. Regarding the indicators, the country retained the twelve core indicators of CARD to which they added other indicators. Thus, with regard to global indicators, the local system has retained the CARD common indicators. Regarding indicators relating to resilience, in addition to the two basic indicators, Côte d'Ivoire intends to monitor a third indicator which is the "security stock". Regarding industrialization indicators, apart from the two basic ones, the system intends to monitor "traceability" and "the evolution of the services of small processing units". With regard to competitiveness, the local monitoring-evaluation system intends, in addition to the common indicators, to monitor three other indicators, namely: "the gap between the price of imported rice and the local price", "the milling rate" and "post-harvest losses". Finally, with regard to empowerment, the system intends to monitor three more indicators, namely: "the strengthening of processing units", "the level of functioning of the structures among the RVC" and "the sector financing". Indicators were retained in a consensual manner

with the main actors. He also indicated that for an effective implementation of the M & E, ADERIZ needs 50 million FCFA/year. He also indicated the challenges of the M & E system are, in particular the slowness in the collection and analyzing of data, the low capacity to make realistic projections and above all the cost of the system. Finally, he indicated that the country will organize an annual review of the implementation of the NRDS-II and the first review is scheduled for February 2022.

The participants welcomed the efforts of the CARD Secretariat on developing indicators and guidelines for tracking the progress of implementation of NRDS at country level. They however expressed some concerns on the inadequate human and technical capacities for M&E at country levels. They requested the CARD Secretariat and other development partners to build skills in collecting and analyzing the data for each of the set indicators. Dr. Haneishi informed that FAO, with support from Japanese Government, had been assisting some CARD member countries on collection and statistical analyses of data for their rice sectors, and indicated that the CARD Secretariat will continue to source support from JICA and other CARD-SC members.

Panel Discussion on Industrialization

One of the major pillars of the CARD's R.I.C.E approach involves industrialization of rice sector. To clarify what industrialization means for Africa's rice sector, what the pertinent challenges in industrializing rice value chain are and how industrialization could fit into the UN's evolving concept on food systems approach; a panel discussion was organized. Mr. Nur Abdi (IsDB) moderated discussions amongst a panel comprised of Mr. Jean Claude Musabyimana (Permanent Secretary, Rwandan Ministry of Agriculture and Animal Resources), Mr. Baba Robert (Head of Marketing, NIRSAL, Nigeria), Mr. Ernest Ruzindaza (Senior Economist, World Bank) and Dr. Abebe Haile-Gabriel (Assistant Director-General and Regional Representative for Africa, FAO). The panel discussions began with a video on industrialization efforts on rice processing sub-sector in Rwanda. It showed how Rwandan government's policies on creating a favorable environment for the private sector and de-risking the private sector investments in the rice milling sector led to successful modernization of processing capacities and improvement in the competitiveness of locally produced rice.

The discussions concluded that industrialization means facilitation of transformation of rice sector from subsistence to market-oriented production, processing, value-addition and marketing through efficient mechanization and commercialization processes. The panel members outlined major challenges for industrialization in Africa, which include inadequate political will, lack of a coordinated approach along the value chain and financial risks. The panel advised that policy decisions in each member country should be based on specific evidences and lessons learnt from Asia and Africa. The panel also concluded that an ideal industrialization of rice sector in Africa should be anchored on to its broader food-based systems approach. In this context, the panel noted that engagement of a broad set of actors involved in other important food production and supply systems in the country is critical in enabling and sustaining industrialization.

New CARD SC membership

Dr. Yusuke Haneishi informed the participants that CARD Secretariat received expression of interest from African Agriculture Technology Foundation (AATF) for joining the CARD Steering Committee. Although the interest was approved at the sixteenth meeting of CARD-SC, AATF could not be officially accepted since the operational guidelines of CARD management requires approval from the General

Assembly of CARD stakeholders. He also mentioned that the criterion set by the guidelines for becoming a SC member included: - (i) value added to the initiative, (ii) assignment of an official focal point by the institution, and (iii) regular participation at the CARD SC and General meetings.

Dr. Kayode Sanni of AATF presented how their membership poses synergy and how AATF could contribute to the objectives of the CARD initiative. AATF's goal is to transform livelihoods of farmers in Africa through transfer of technologies. Its approach includes identification of appropriate technologies, facilitation of access and commercialization of such proven technologies. AATF has set 5 basic priority areas viz., productivity, mechanization, commercialization, policy, and nutrition. AATF presently runs 5 projects in 23 countries. While identifying technologies, AATF engages national research institutions and validate the selected technologies through adaptation tests under national programs. The proven technologies are then scaled up and geared towards commercialization through public-private partnerships.

Dr. Sanni cited the successful identification and evaluation of hybrid rice varieties in Tanzania and Kenya in collaboration with private companies. Through a 2-line hybrid system, 10 high-yielding hybrid rice varieties have been released in Kenya. AATF ensures access to parental lines to public seed production systems through an Alliance for Hybrid Rice in Africa (AHyRA). AATF is also engaged in building technical capacities on selection of parental lines, hybrid seed production and evaluation to national seed systems. AATF believes that through such interventions that increase quantity and quality of rice produced by African farmers, it could help CARD achieve its goal of doubling rice production in Africa. The GM8 approved AATF to become a new member of CARD-SC.

Closing Remarks

The closing remarks were made by the Minister of Agriculture and Livestock of Madagascar, Mr. Harifidy Ramilison. In his speech, the Minister indicated that it was an honor and a privilege for him to close the GM8, because he recognizes himself as part of the CARD family for having worked for ten years as Regional Consultant. He said that the discussions on different themes affecting the different segments of the rice value chain led to tangible results. This is evidenced by the level of knowledge of the actors and especially their capacity building. He also welcomed the consensus reached around the new monitoring and evaluation framework based on the RICE approach. He went on to say that he supports CARD's goal of doubling rice production and reiterated his country's interest and commitment to work to help achieve this goal. He called on all member countries of the CARD initiative to do the same because he believes it is the best way to contribute to the achievement of the objectives of the 2030 agenda, in particular the objective relating to "zero hunger". He finally thanked the CARD Secretariat for the good organization of GM8 and also thanked the members of the CARD Steering Committee as well as the CARD Secretariat for their constant support in the development and implementation of the NRDS and RRDS.