



SADC intervention in the Rice Sector

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Background Information

- **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 Zambia).
- **CARD member countries:** 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 as approved by Summit in March 2017, identifies six priority value chain clusters namely; **Agro-processing, Mineral Beneficiation, Pharmaceuticals, Capital goods, Consumer goods and Services.**
- Specific to the profiling of the agro-processing cluster, a total of 14 value chains with great potential for regional upgrading were identified. Among these the rice was found to have the greatest potential for development as the region continues to import huge amounts despite having potential to produce the same
- Building on the findings of the profiling study, the Secretariat has done a detailed mapping and analysis of selected value chains, with the view to, among others, determine the actual performance and identify opportunities for further development.

Importance of Rice in the SADC Region

- Most rice consumed → imported from RoW – a total of \$898 m p.a. (2015-2017)
 - 95% imported by SADC MS – result of **low levels of rice production** in region
- **SADC a net importer of rice** (2015-2017) - \$1,12 bn → **negative trade balance** of \$1,03 bn with the RoW
- **\$1,12 bn** of rice **imported** into SADC, only **7%** (\$81 m) was sourced from within the region
- **'Rice in the husk'** (paddy or rough) - only \$6 m product imported from RoW
- Same applies to **husked (brown rice)** where only \$2 m imported from RoW
- **'Semi-milled or wholly milled rice, whether or not polished or glazed'** SADC imports from RoW - \$895 m p.a. (2015-2017)
- **'Broken rice'**: SADC imports from RoW - \$128 m (2015-2017)

Importance of Rice in the SADC Region -2

Paddy Rice Production in the SADC Region (MT)

	Production in 2020	Ten Year Average Production	% of Total Regional Production (based on 10yr Av)	Trend
Madagascar	4,232,000	4,007,112	49.8%	-0.27%
Tanzania	4,528,000	2,595,991	32.3%	9.56%
DRC	1,379,000	1,056,911	13.1%	8.14%
Mozambique	137,243	163,066	2.0%	-4.23%
Malawi	145,446	119,262	1.5%	1.41%
Zambia	34,630	38,701	0.5%	-4.45%
Comoro	30,543	29,586	0.4%	1.48%
Angola	10,000	23,372	0.3%	-11.86%
South Africa	3,076	3,058	0.0%	0.20%
Zimbabwe	1,336	1,265	0.0%	2.48%
Eswatini	1,000	892	0.0%	3.38%
Total	10,502,274	8,039,635		3.91%

Rice Productivity (Hg/Ha) in the Main Rice Producing Member States

	2020	Ten Year Average Yield	Average Annual Change Hg/Ha/Year	Trend
Tanzania	28,533	23,899	1,306.31	5.47%
Madagascar	25,266	37,234	(1,339.76)	-3.60%
Malawi	19,989	18,390	(11.77)	-0.06%
DRC	10,447	8,167	243.86	2.99%
Mozambique	4,834	5,338	(283.79)	-5.32%
SADC Region	17,466	17,825	(35.38)	-0.20%

Importance of Rice in the SADC Region -3

Milled Rice Consumption (1,000 MT)

	2011	2021	% Increase 2011 to 2021
Madagascar	2,902	3,210	11%
Tanzania	1,584	2,520	59%
DRC	312	1,122	260%
South Africa	850	890	5%
Mozambique	531	889	67%
Angola	324	532	64%
Mauritius	55	65	18%

Main Importers of Milled Rice (USD '000s)

Importer (Buyers)	2021	10 Year Min	10 Year Max	10 Year Average	Trend %	Top 3 Suppliers
South Africa	504,457	419,430	686,560	517,078	-2.32%	Thailand, India, Pakistan
Mozambique	377,318	94,476	377,318	214,063	8.72%	India, Thailand, Pakistan
Angola	263,421	13,819	347,980	186,427	6.75%	Thailand, India, Brazil
Madagascar	272,914	84,933	272,914	168,811	9.11%	India, Pakistan, China
Zimbabwe	129,597	50,487	129,597	105,282	-0.74%	Pakistan, UEA, Thailand

Main Intra SADC Exports of Milled Rice (USD '000's)

Exporter	Buyers	2021	Min	Max	10 Year Average	Trend
South Africa	Botswana	33,686	20,366	33,686	25,286	5%
South Africa	Eswatini	17,974	12,528	19,069	15,993	3%
South Africa	Zimbabwe	11,894	3,035	24,571	15,436	-13%

Existing interventions in the Rice Sector

Regional Centre of Leadership for rice and rice-based systems in Mozambique (SADC-CCARDESA, World Bank)

- promotes collaborative research and partnerships among SADC countries with scientists working jointly to generate technologies to benefit the entire region, for example introduced three high yielding rice varieties with a yield potential (Kayanjamalo, Katete and Mpatsa)

Climate Smart Agriculture Knowledge Products (SADC, GIZ, BMZ)

- Climate Smart Seed Selection for Rice
- Climate Smart Water Management Options for Rice
- Climate Smart Agroforestry Options for Rice
- Climate Smart Post Harvest Management Options for Rice

Regional Agricultural Information Management System – launched recently (SADC, FAO)

- integrated and multilingual system providing policy-makers with access to reliable and timely data on which to base policies, resource allocations, and emergency interventions

The SADC Harmonized Seed Regulatory System (SADC, USAID)

- set of rules, standards, procedures, and supporting measures necessary to facilitate the movement of seed between countries

Regional Detailed Mapping and Analysis of the Rice Value Chain

Overall Objective

- To conduct a detailed analysis and mapping of the four agro-processing value chains (cotton, rice, soya and wheat) at national and regional levels in the SADC Region.
 - The analysis will support evidence-based value chain development by different stakeholders in the region with the view of promoting value added agro-exports.
 - Mapping to include potential and current cross-border regional industrial clusters.

Specific Objectives

- To map, quantify and analyse value chains at both national and regional level
- To assess and analyse actual regional performance of the value chains using actual production and export figures
- To identify Strengths, Weaknesses, Opportunities, and Threats for the growth of the selected value chains.
- To provide specific recommendations that should be undertaken at both national and regional levels for optimisation and potential upgrading of the value chains.
- To identify and map current and potential regional industrial clusters of the value chains and make recommendations on which clusters should be prioritised in order to enhance the growth and development of cross border collaboration in the development of regional value chains.

Regional Detailed Mapping and Analysis of the Rice Value Chain

Expected results

1. Map core processes in each rice value chain (the transformation from raw materials to final products)
2. Identify and map the main actors (key market actors, buyers and businesses including service providers, and institutions) involved
3. Map the flow of products (including what and where are the key markets and customers (buyers) in the region - including Intra-SADC and Extra-SADC export potential of the value-added products.
4. Map flows of information and knowledge
5. Map relevant overlays in the Value Chain, including (areas under production, volumes produced and traded, productivity, number of actors/enterprises, number of jobs, numbers of women and youth participating, sales, income distribution, returns to labour and technologies used)
6. Map the geographical flow of the product or service and location of actors
7. Map value at different levels of each value chain
8. Map the relationships and linkages between value chain actors
9. Map Business Services that feed into the value chains
10. Map constraints (and gaps) and potential solutions in each value chains

Progress Report/Roadmap

- Validation of the Regional Detailed Mapping and Analysis of the Rice Value Chain Study Report – by August/September 2023
- Coordinate with SADC Member States and Partners in the
 - Development of the SADC Regional Rice Value Chain Strategy
 - **Recruit consultant to lead strategy development Q2**
 - **Regional stakeholder platform meeting to validate strategy Q3**
 - **Regional stakeholder dissemination/promotion of rice in the region Q4 onwards**
 - Implementation of the SADC Regional Value Chain Strategy
- **Support Required from CARD and Partners**
 - Technical assistance/backstopping development of Regional Rice Development Strategy
 - Technical and Financial support to convene stakeholder platform to validate Regional Rice Development Strategy
 - Technical support to disseminate/promote **rice value chains** in the region



ASANTE SANA

MERCI BEAUCOUP

MUITO OBRIGADO

THANK YOU.

