



21st Meeting of the Steering Committee (CD21) and 10th General Meeting (GM10) of the Coalition African Rice Développement (CARD) 9-12 March 2026, Antananarivo, Madagascar

# Promotion of Sub-Regional Level Activities through Regional Economic Commissions (RECs)

## Presentation of ECCAS

 Food Sovereignty

 Sustainable Development

 Regional Integration

ABAKAR MOHAMMED  
Director of Agriculture and Rural Development  
Economic Community of Central African States

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Horizon 2035

# Presentation Outline



## 01 Context and Challenges

Rice as a pillar of food security in Central Africa, challenges of import dependency and production trends

## 03 Strategic framework

Vision 2035, alignment with the SDGs and prospective scenarios for the transformation of the sector

## 05 Implementation

Diversified financing mechanisms and regional governance architecture

**i Objective:** Transform the rice sector to achieve regional food sovereignty by 2035

## 02 Sector Assessment

Comprehensive SWOT analysis: strengths, weaknesses, opportunities and threats in the rice sector in ECCAS.

## 04 Strategic Priorities

Three priority areas: resilience of production systems, competitiveness, governance and financing.

## 06 Monitoring and Outlook

Performance indicators, monitoring and evaluation system, and roadmap to adoption



01

CHAPTER ONE

# Context and Challenges

Rice, a pillar of food and nutritional security in Central Africa

Dependence on imports

Untapped potential

Structural  
challenges



# The Challenge of Import Dependence

## ⚠️ A Critical Situation

Local rice production in ECCAS covers only **40% of current needs**, creating chronic dependence on imports that undermines food security and the regional economy.

↗️ Demand is growing at more than **6% per year**, fuelled by massive urbanisation and changing dietary habits.

## 🏦 Major Economic Impact

**\$1.2 billion**

Annual imports

**60**

Import dependency

This chronic dependence weighs on the balance of payments, increases pressure on foreign exchange reserves and weakens local economies in the face of global market volatility.

## Factors driving demand growth

- 🏠 **Accelerated urbanisation**  
Mass migration to urban areas
- 👥 **Population Growth**  
Rapidly expanding population
- 🍴 **Dietary Changes**  
Changes in Dietary Habits

## Sources of import

Asia (India, Thailand, Vietnam)	~85%
Other regions	~15%

ⓘ Exposure to climatic and commercial shocks



# Trends in Rice Production in Africa

## Production Dynamics

African rice production has **grown** at an **average annual rate of 4%**, from 34.2 million tonnes in 2018 to 42.6 million tonnes in 2023.

Growth 2018-2023

+24.6

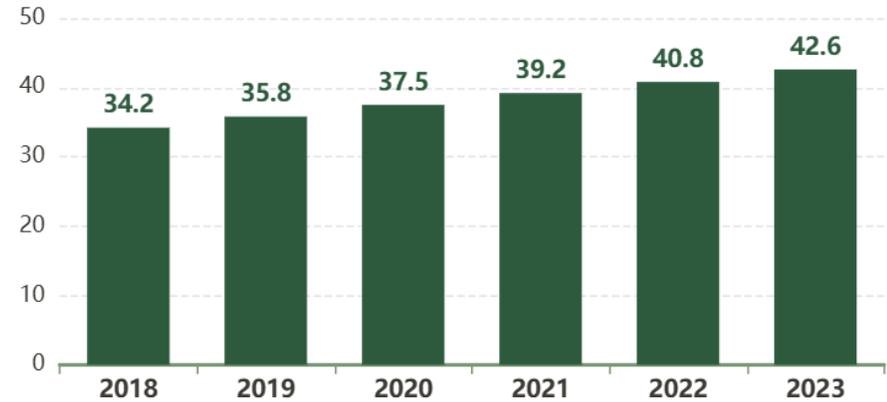
## Geographical Distribution

- West Africa >50%
- East Africa ~30%
- Central Africa ~5%

! Central Africa shows slower growth, which began around 2012

## Production trends in Africa (Mt)

Millions de tonnes



## The Challenge of Self-Sufficiency

Despite growth, production remains **insufficient** to meet rapidly growing demand. Africa imports more than a third of the rice traded worldwide.

17 Mt

Imports 2023

+1.4

Annual growth



# Status of the Rice Sector in ECCAS

## Production Trends (2018-2023)

Average production  
**2.17 million tonnes**

Annual growth  
**+5.6%**

Average yield  
**1.14 t/ha**

Production has increased from **1.90 to 2.49 million tonnes**, but yields remain stagnant at levels well below those of other sub-Saharan African regions.

## Main producing countries (>90% of production)

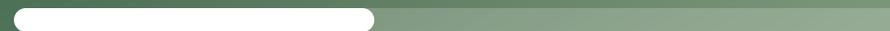
1 Democratic Republic of Congo ~40%

2 Cameroon ~30%

3 Burundi & Chad ~20%

## Supply-demand imbalance

Coverage of needs **40**



Import dependency **60**



Current production levels cover only around 40% of needs, while demand is growing at over 6% per year.

## Structural constraints

- × Low mechanisation
- × Unsuitable varieties
- × Inadequate infrastructure
- × Limited access to inputs

**Untapped potential:** Most ECCAS countries have significant untapped potential, particularly in terms of irrigable land and varietal diversity suited to local agroecological conditions.



02

CHAPTER TWO

# Industry Diagnosis

SWOT analysis and identification of drivers for change

Strengths &  
Weaknesses

Opportunities & Threats

Lever for action



# Strengths and Weaknesses of the Sector

## + Strengths

### Political Will

Member States' commitment to strengthening food sovereignty

### Strategic frameworks

Existence of regional frameworks facilitating the implementation of agricultural policies

### Natural Resources

Extensive arable land and favourable agro-climatic conditions

### Promising market

Strong local demand for rice, creating a dynamic market with potential for development

## - Weaknesses

### Insufficient coordination

Lack of coordination between stakeholders leading to inefficiencies in implementation

### Limited infrastructure

Inadequate storage, processing and transport infrastructure

### Access to Inputs

Limited access to improved seeds and quality inputs

### Low competitiveness

Local producers and processors are uncompetitive compared to imports



# Opportunities and Threats

## ↑ Opportunities

### Population Growth

Increased rice consumption offering favourable prospects for local production

### Agroecological Diversity

Diverse ecosystems allowing for different adapted production systems

### Public-Private Partnerships

Financing and investment opportunities to modernise the sector

### Regional Harmonisation

Trade and regulatory policies facilitating intra-CEEAC trade

## ⚠ Threats

### Climate change

Unpredictable weather variations affecting production

### Competition Imports

Subsidised imported rice limiting the competitiveness of local rice

### Political Instability

Regulatory uncertainties hindering investment

### Health crises

Pandemics and diseases affecting the value chain



03

CHAPTER THREE

# Strategic Framework

Vision, objectives and trajectory towards 2035

Vision 2035

Scenarios

Lever



# Vision and Strategic Alignment

## Vision 2035

By 2035, the ECCAS region will have achieved **food and nutritional sovereignty**, while promoting sustainable economic growth through competitive regional rice production.

“Rice will become a key driver of food security and economic prosperity in the region.”

## Overall Objective

Contribute to the **transformation of rice value chains** in order to effectively meet the growing demand for rice at the regional level.

## Strategic Alignment

-  **SDG 2030**  
Goals 1, 2, 8, 9, 12, 13
-  **CAADP**  
Comprehensive Agricultural Development Programme
-  **CAP 2040**  
Common Agricultural Policy ECCAS
-  **SNDR**  
National Rice Development Strategies

## Strategic Horizon

**2025**

Baseline



**2035**

Objective

Duration: **10 years** of transformation



# Objectives and Prospective Scenarios



## Minimal Scenario

Production	3.5 Mt
Coverage	35
Dependence	65

Low transformation, persistent constraints



## Medium scenario

Production	4.7 Mt
Coverage	50
Dependency	50

Gradual ramp-up



## Optimistic scenario

Production	6.5 Mt
Coverage	65
Dependence	35

Rapid growth and massive investment



## Strategic Assumption

The SRDR-AC adopts a trajectory inspired by **the optimistic scenario**, which is considered both ambitious and achievable. It takes into account expected progress in investment, governance and regional cooperation. This vision is based on the mobilisation of Member States around common objectives: reducing imports, developing an integrated regional market, and promoting local rice as a lever for food sovereignty.

Area

**2.75 Mha**

+46% vs 2025

Yields

**2.36 t/ha**

+107% vs 2025

Intra-trade

**50**

vs <5% currently

Modern producers

**70**

technical adoption



# Three Complementary Levers

## 1 Increase Production

### Improving Productivity

Certified seeds, efficient water management, quality inputs

### Expansion of Land Area

From 1.9 Mha to 2.75 Mha (+46%) through lowland development

### Appropriate Mechanisation

Production and post-harvest to reduce losses

2.7 Mt → 6.5 Mt

+74% by 2035

## 2 Intraregional trade

### Marketing hubs

Facilitate consolidation, processing and distribution

### Harmonisation Standards

Quality and trade policies between states

### Logistics Infrastructure

Roads, warehouses, storage platforms

<5% → 50%

Intraregional trade

## 3 Governance & Investments

### Institutional framework

Regional umbrella organisations and strategic steering

### Financial Mobilisation

Public, private, international and innovative funds

### Professionalisation

Training, access to credit, inclusion of women and young people

8 regional

regional infrastructure programmes



## Overall objective

Transform the sector to achieve regional food self-sufficiency

Coverage rate

35% → 70%



04

CHAPTER FOUR

# Strategic Priorities

Three priority areas for transforming the sector

Resilience

Competitiveness

Governance



# Resilience of Production Systems

## Objective

Make rice production systems more resistant to the impacts of **climate change** (precipitation variability, heat waves, floods) and external shocks (economic or health crises).

## Intensive Production System

- ✓ **High-Yield Varieties**  
Adapted to local climates and resistant to stress
- ✓ **Improved Agricultural Practices**  
Row planting, rational fertilisation
- ✓ **Agricultural Mechanisation**  
Reduction of post-harvest losses
- ✓ **Irrigated rice cultivation**  
Production stabilisation

## Modern production system

- 🧪 **Access to Inputs**  
Subsidised fertilisers and pesticides
- 🎓 **Training Centres**  
Dissemination of improved farming techniques
- 🌊 **System of Rice Intensification (SRI)**  
Intensive Rice Cultivation System
- 💰 **Tax incentives**  
Subsidies to stimulate production
- 💧 **Irrigation modernisation**  
Infrastructure for stable production

## Expected Results

**2.4 t/ha**  
Target yield

**+100**  
Improved yields



# Competitiveness and Stimulation of Trade

## 🏆 Objective

Improve the **competitiveness** of the rice sector to face international competition and ensure that locally produced rice becomes more attractive to regional markets.

## 📈 Improving Competitiveness

🌱 **Harmonisation of Standards**  
Technical, health and environmental quality

🚚 **Transport Infrastructure**  
Investments in transport and storage

📄 **Customs Relief**  
Customs duties on rice produced in the region

🏭 **Local processing**  
Strengthening processing capacities

📣 **Promotion of local rice**  
Awareness campaigns

## ↔️ Boosting trade

💻 **Regional Platform**  
Online Rice Marketing

🏠 **Group Purchasing**  
Reducing Raw Material Costs

🌱 **Input Trading**  
Support for seed and fertiliser exchanges

📦 **Strategic regional stocks**  
Regional stocks to stabilise supply

## 🎯 Expected results

**50**  
Intra-regional trade

**Quality**  
Competitive rice



# Governance and Funding

## Objective

Establish **strengthened governance** and **adequate financing** to ensure the long-term success of the rice sector.

## Inclusive Institutions and Approaches

 **Regional Umbrella Organisations**  
representing the interests of producers

 **Steering Mechanism**  
Regional coordination, monitoring and evaluation

 **Regulatory Framework**  
Harmonised across the rice sector

 **Professionalisation**  
Training, access to credit, advisory support

## Effective financing mechanism

 **Infrastructure**  
Irrigation channels, agricultural machinery, processing units

 **Roads and logistics**  
Rehabilitation of rural roads, silos and warehouses

 **Bankable Projects**  
Preparation and presentation to lenders

 **Guarantee funds**  
Securing investments

 **Crédit Agricole**  
Promotion and involvement of the private sector

## Expected results

**8**  
Regional programmes

**CRP**  
Steering Committee



# Priority Rice Production Centres

1

## Logone River Basin

Cameroon – Chad

**Potential:** High water potential and historical agricultural vocation

✓ Development of cross-border irrigated areas

2

## Ruzizi Plain

DRC – Burundi

**Potential:** Favourable agroecological conditions and strategic access to consumption areas

✓ Intensification of irrigated rice cultivation

3

## Ntem Valley

Gabon – Equatorial Guinea – Cameroon

**Potential:** Favourable climate, arable land and strong potential for hydro-agricultural development

✓ Promotion of private investment

4

## Bozoum site

Central African Republic

**Potential:** Large production site of 400-500 ha for lowland and irrigated rice cultivation

✓ Pilot perimeter 500 ha



## Strategic Impact of Hubs

These hubs are **major levers** for regional agricultural transformation through the promotion of modernised, inclusive and sustainable rice farming systems. Their development will help improve food security, create economic opportunities in rural areas and strengthen regional cooperation on issues related to water, agriculture and territorial development.



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CHAPTER FIVE

# Implementation

Financing mechanisms and governance architecture

Financing

Governance

Coordination



# Mobilisation of Financial Resources

## Public Funds

### National Funds

Budgetary contributions from Member States

### Regional Funds

FSRDA-AC reactivated

## International Funding

 World Bank

 African Development Bank

 FAO, IFAD

## Public-Private Partnerships

 Regional Private Sector

 Diaspora investments

 Farmers' organisations

## Innovative Mechanisms

 **Green Bonds**  
Sustainable financing for environmentally friendly agricultural projects

 **Guarantee funds**  
Securing agricultural investments

 **Tax Incentives**  
Import taxes for local development funds

## Financing approach

**Grants** 30  
  
Guarantee funds, subsidies

**Private financing** 70  
  
Investments, agricultural loans



# Regional Governance Structure

**CRP**  
Regional Steering  
Committee

**Meeting: once a year**

**Chair: ECCAS Commissioner**

- Strategic guidelines
- Liaison with Member States
- Resource mobilisation

**CTSci**  
Technical and Scientific  
Committee

**Meeting: once a year**

**Chair: ECCAS Agriculture Directorate**

**Technical and scientific validation**

**Technical Secretariat**  
CEEAC level (Agriculture Directorate)

- Day-to-day operations management
- Supervision of resource allocation
- Facilitation of communication
- Monitoring data analysis

**National Units**  
Coordination (each Member State)

- National implementation
- Adaptation to local circumstances
- Dialogue with national stakeholders

**Flow of interactions**

- Guidance & Governance**  
CEEAC/CRP → Secretariat → National Units
- Financial flows**  
Financial Institutions → ECCAS → National Projects
- Expertise & Training**  
Technical Partners → Producers
- Trade Flows**  
Production → Local, national and regional markets



06

CHAPTER SIX

# Monitoring and Outlook

Monitoring and evaluation mechanism and roadmap

Indicators

Monitoring and  
Evaluation

Roadmap



# Monitoring and Evaluation of SRHR-AC

## Production and Yields

Quantity of paddy produced	Tonnes
Harvested areas	Hectares
Average yield	t/ha
White rice produced	60% paddy

## Industrialisation and competitiveness

- Imported machinery**  
Tractors, transplanters, combined machines
- Processing capacity**  
Paddy to white rice
- Quality of milled rice**  
Breakage rate, long grain
- Competitive pricing**  
CEEAC rice vs imported rice

## Self-sufficiency and resilience

Self-sufficiency rate	%
Import volume	Tonnes
Climate-smart varieties	5+ countries
Certified seeds	5+ countries

## Monitoring and evaluation system

- M&E manual**  
Participatory and consensual development
- Digital Tools**  
Computerised Information Management System
- Frequency**  
Half-yearly reports and annual reviews



# Next Steps Towards Adoption

## 📅 Implementation Timeline



End of July 2025

**Integration of workshop feedback**

CARD Secretariat



First half of August 2025

**Distribution of revised version**

CARD + States + Partners



Second half of August 2025

**Final revision**

CARD Secretariat



End of August 2025

**Transmission to ECCAS**

CARD + ECCAS

## 🤝 Key partners



**FAO**

Technical support and expertise



**AfricaRice**

Research and improved varieties



**African Development Bank**

Financing and investment



**IFAD**

Sustainable agricultural financing

## 🚩 Stakeholder Engagement



**Member States**

Strong political commitment and mobilisation of domestic resources



**Private Sector**

Investments in production, processing and marketing



**Farmers' Organisations**

Structuring and professionalisation of producers



**Local communities**

Active involvement of young people and women in the sector

# Formulation and validation



## Key activities in phase 1

1

### Preparation of strategic documents for the internal ECCAS workshop

Drafting of framework documents, including a summary sheet, explanatory statements and draft decisions

#### DERNADR

Political commitments and support from the SRDR-AC

#### COMMISSION AND OTHER DEPARTMENTS

Support from the College of Commissioners and ownership

2

### Regional validation workshops with all stakeholders

Organisation of a regional validation workshop involving all stakeholders to review, enrich and approve all strategic documents developed.

Government

PTF

Private sector

Civil society

OPR

IMP/EXP

3

### Technical review and finalisation of documents

Submission of documents for **technical review (with support from CARD)** to ensure technical quality, consistency and alignment with regional standards.

Technical quality

Regional consistency

Feasibility

4

### Alignment with the commitments of the Kampala Declaration

Verification of compliance with the **commitments of the Kampala Declaration**: 6% agricultural growth and allocation of at least 10% of the national budget to the agricultural sector.



Estimated

4.8

months

This critical phase transforms diagnoses into concrete actions through strategic documents validated by all stakeholders.

## Key deliverables



### Regional workshop report

Stakeholder commitments



### SRDR-AC validated

Accompanied by its Action and Investment Plan



### Technical review

Taking into account technical quality, regional consistency and feasibility



### Alignment with continental commitments

# Adoption and resource mobilisation



Estimated

12

months

This final phase formalises commitments and mobilises the resources needed to effectively launch the programmes.

## Key commitments of Malabo

10

Of the national budget allocated to the agricultural sector

6

Annual growth in the agricultural sector

## Key activities in phase 2

1

### Donor round tables

Organisation of high-level events to **mobilise the financial resources** needed to implement the SRDR-AC. These round tables bring together bilateral and multilateral donors and the private sector.

World Bank

AfDB

BOAD

Bilateral funds

2

### Signing of letters of commitment

Official ceremonies for **the signing of letters of commitment** by the relevant ministers and PTF representatives, symbolising the firm commitment of all parties.

High-level political commitment

3

### Mobilisation of financial resources

Effective mobilisation of pledged funds and **establishment of financing mechanisms** (national funds, regional funds, innovative financing) to ensure the sustainability of programmes.

Public funds

PTF

Private sector

4

### Official launch of programmes

Organisation of launch ceremonies to mark the effective start of implementation of priority programmes and projects identified in the SRDR-AC



# Towards Regional Food Sovereignty

## Regional Food Sovereignty

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The SRDR-AC is a **structuring political, economic and social project** designed to establish rice cultivation as a pillar of regional prosperity, stability and resilience.

Through this strategic choice, ECCAS is equipping itself with a decisive tool for building a **self-sufficient, integrated and prosperous Central Africa**, capable of meeting the challenges of tomorrow.



**6.5 Mt**  
Target production for  
2035



**70**  
Coverage rate



**35**  
Import dependency



**50**  
Intra-regional trade

Economic Community of Central African States (ECCAS)

September 2025