

Voluntary Report – Voluntary - Public Distribution

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Report Name: 2025 Rice Supplementary Annual Update for West Africa

Country: Senegal

Post: Dakar

Report Category: Grain and Feed

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Report Highlights:

This report is a supplementary follow-up to the 2025 Senegal Grain and Feed Annual, covering rice in Guinea, Mali, and Burkina Faso. Despite a 13 percent drop in area harvested due to flooding in MY 2024/25, Mali continues to be the largest rice producer among the three countries. MY 2025/26 combined area harvested is forecast to increase 5.1 percent at 2.07 million HA. MY 2025/26 combined milled rice production is expected to rebound to 3.47 million MT. Combined milled rice imports are forecast to increase 4.1 percent at 2.52 million MT with expected steady domestic demand.

EXECUTIVE SUMMARY

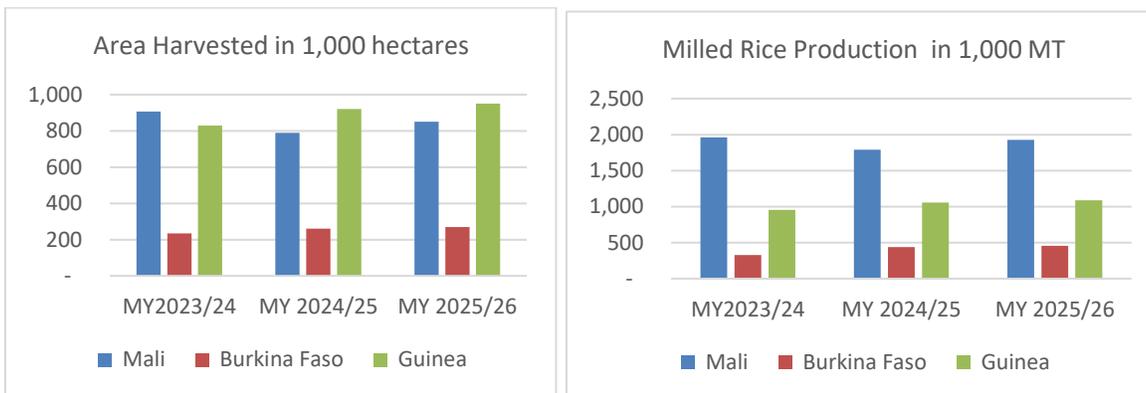
Despite a 13 percent drop in area harvested due to flooding in MY 2024/25, Mali continues to be the top rice producer among the three countries covered by this report.

For MY 2025/26, the combined area harvested for these three countries is forecast to increase 5.1 percent to 2.07 million hectares (HA). MY 2025/26 combined milled rice production is expected to rebound to 3.47 million MT factoring in average rainfall and pest pressure. Combined milled rice imports for the same period are forecast to increase 4.1 percent to 2.52 million MT on the expectation of steady domestic demand.

MY 2024/25 area harvested is estimated to remain roughly flat with the previous marketing year at 1.97 million HA. MY 2024/25 milled rice production is estimated to increase slightly by one percent to 3.28 million MT.

In Mali, MY 2024/25 stocks are estimated to decrease 18 percent due to lower production, paired with imports that are estimated to increase by 36 percent to meet demand.

MY 2025/26 combined consumption for all three countries is forecast to increase 5.1 percent over the previous marketing year to 5.93 million MT. Rice continues to be one of the most consumed cereals in West Africa.



GUINEA

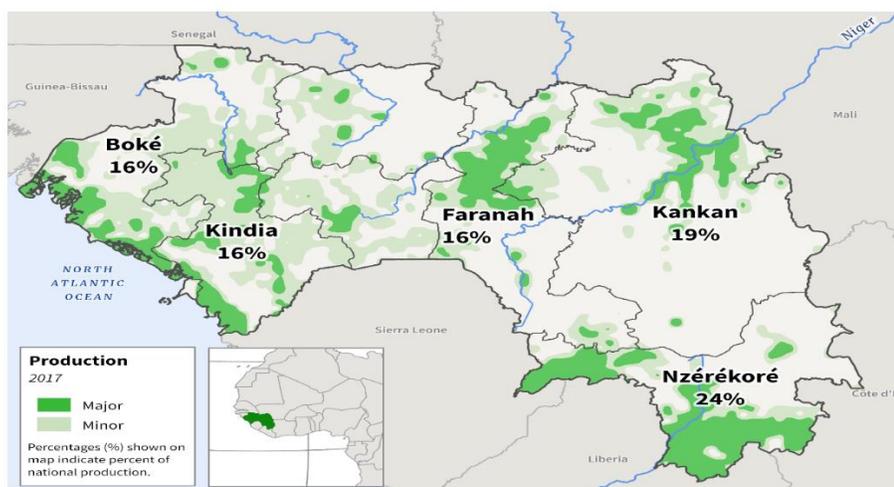
Production

Marketing Year (MY) 2025/26 area harvested is forecast to increase three percent to 950,000 Hectares (HA); milled rice production is forecast up three percent to 1.09 million MT. This is on the expectation of increasing investment from the Government of Guinea (GOG) to boost agricultural production by increasing access to inputs and agricultural equipment. A national agricultural strategy was adopted in 2023 and became effective in May 2024. As a result of this policy, which promotes family farming, sources indicate farmers will be incentivized to plant more.

MY 2024/25 area harvested is estimated at 920,000 HA, representing an 11 percent increase from the previous marketing year, based on GOG's increased access to inputs, extension services, agricultural equipment, and infrastructure. This increase is despite some abandoned area due to flooding in many regions including Kankan, Siguiiri, Kindia, N'Zerekore. MY 2024/2025 milled rice production is estimated to increase ten percent to 1.05 million MT compared to the previous year based on the factors previously noted.

Exhibit 1: Guinea Rice Production by Region

Guinea: Rice Production



USDA Foreign Agricultural Service
U.S. DEPARTMENT OF AGRICULTURE

Source: International Food Policy Research Institute,
Spatial Production Allocation Model 2017

Consumption

MY 2025/26 consumption is forecast to increase seven percent to 2.2 million MT based on available supply and population growth. MY 2024/25 consumption is estimated to increase 14 percent to 2.06 million MT based on increased imports.

Trade

MY 2025/26 rice imports are forecast to increase five percent over the previous marketing year at 1.15 million MT. Despite considerable investment in the rice sector, the Guinean market remains dependent on imported rice. MY 2024/25 imports are estimated to increase 27 percent to 1.1 million MT. This increase is to meet demand on rice after a low harvest in MY 2023/24 and on easy access to Indian rice.

Stocks

MY 2025/26 stocks are forecast to reach 121,000 MT, 20 percent lower than the previous marketing year, based on available supply.

MY 2024/25 stocks are estimated flat with the previous marketing year at 151,000 MT, despite the 27 percent import increase. According to official contacts, stocks are held by the private sector that maintains a minimal amount per year.

Policy

Since December 2019, Guinea has applied the ECOWAS common external tariff (CET), which sets the customs duty for milled rice at 10 percent. Additional taxes such as statistical fees of 1.0 percent, and a solidarity community levy of 1.5 percent also apply to milled rice.

Guinea: Milled Rice: Production, Supply and Distribution Table

Rice, Milled Market Year Begins	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
Guinea	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	2352	830	2100	920	2100	950
Beginning Stocks (1000 MT)	237	237	287	151	579	151
Milled Production (1000 MT)	2333	955	2442	1055	2310	1090
Rough Production (1000 MT)	3535	1447	3700	1598	3500	1652
Milling Rate (.9999) (1000 MT)	6600	6600	6600	6600	6600	6600
MY Imports (1000 MT)	867	867	1200	1100	1150	1150
TY Imports (1000 MT)	1065	880	1100	1100	1100	1150
TY Imp. from U.S. (1000 MT)	0	3	0	1	0	0
Total Supply (1000 MT)	3437	2059	3929	2306	4039	2391
MY Exports (1000 MT)	100	100	100	100	100	70
TY Exports (1000 MT)	100	100	100	100	100	70
Consumption and Residual (1000 MT)	3050	1808	3250	2055	3400	2200
Ending Stocks (1000 MT)	287	151	579	151	539	121
Total Distribution (1000 MT)	3437	2059	3929	2306	4039	2391
Yield (Rough) (MT/HA)	1.503	1.7434	1.7619	1.737	1.6667	1.7389

(1000 HA) ,(1000 MT) ,(MT/HA)
 MY = Marketing Year, begins with the month listed at the top of each column
 TY = Trade Year, which for Rice, Milled begins in January for all countries. TY 2025/2026 =
 January 2026 - December 2026

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MALI

Production

MY 2025/26 area harvested is forecast to increase eight percent to 850,000 HA on expectations of increased access to subsidized inputs and an improved security situation. MY 2025/26 milled rice production is forecast at 1.93 million MT, also an eight percent increase from the previous marketing year, based on average rainfall, reduced pest pressure, and increased area.

MY 2024/25 area harvested is estimated to decline 13 percent from the previous marketing year to 790,000 HA. Official contacts attribute this decline to limited access to inputs and heavy rains that caused flooding and abandoned areas. Additionally, the insecurity situation due to terrorist attacks in Mali prevented some farmers from accessing their land. The decrease in area is in the regions of Gao (56 percent), Mopti (35 percent), Koulikoro (20 percent), Sikasso (9 percent) and Segou (8 percent). The region of Kayes saw an increase in area of 21 percent. Despite good rainfall, MY 2024/25 milled rice production is estimated to decrease nine percent to 1.79 million MT due to abandoned area.

Consumption

MY 2025/26 consumption is forecast up four percent to 2.4 million MT; MY 2024/25 consumption levels are estimated up three percent year-on-year to 2.3 million MT. Both increases are based on population growth.

Rice is the second largest cereal consumed in Mali, after corn. It is consumed mainly in urban areas due to its ease of cooking. In production zones, local rice is mostly self-consumed. Malian consumers prefer the local variety Gambiaka for its taste. However, Gambiaka appears to be less competitive than imported rice in terms of price and cleanliness.

Trade

MY 2025/26 rice imports are forecast at 500,000 MT, increasing five percent from the previous marketing year. MY 2024/25 imports are estimated to increase 36 percent over the previous marketing year to fulfill demand. This increase is related to the domestic rice production decline during MY 2024/25.

Local rice prices in MY 2024/25 are higher than the previous year and the five-year average. In March 2025, official sources reported a farm gate price of about 400 FCFA/KG (\$0.69), versus 380 FCFA/KG (\$0.66) for the same period in 2024. The price for consumers is about 550 FCFA/KG (\$0.95) compared to 500 FCFA (\$0.86) for the same period in 2024. The retail price for corn is cheaper than local rice at about 280 FCFA/KG (\$0.48), while the sorghum retail price is about 310 FCFA/KG (\$0.54) and millet is at 360 FCFA/KG (\$0.62).

Paddy rice is sold by producers or farmer cooperatives to rice hulling companies who sell to small and large rice collectors before being sold to wholesalers, semi-wholesalers, retailers, and consumers. Rice is being exported mainly through the Port of Dakar, Abidjan, and San Pedro.

Stocks

Stocks for MY 2025/26 are forecast to increase 16 percent to 189,000 MT based on available supply. MY 2024/25 stocks are estimated down 19 percent to 163,000 MT from the previous marketing year due to the decrease in domestic production. The Office of Agricultural Products of Mali (OPAM) under the Commissary of Food Security is in charge of creating, managing, and maintaining cereals stocks, and regulating prices.

Policy

Since January 1, 2015, ECOWAS member countries, including Mali, have implemented a common external tariff (CET) which sets specific rates for different product categories. According to contacts, the transitional government of Mali is implementing the CET rate of 12.5 percent for imported milled rice.

Mali: Milled Rice: Production, Supply and Distribution Table

Rice, Milled Market Year Begins	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
Mali	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	907	906	930	790	930	850
Beginning Stocks (1000 MT)	128	128	194	200	185	163
Milled Production (1000 MT)	1966	1964	1791	1790	2020	1926
Rough Production (1000 MT)	3025	3022	2755	2754	3108	2963
Milling Rate (.9999) (1000 MT)	6500	6500	6500	6500	6500	6500
MY Imports (1000 MT)	350	350	500	475	375	500
TY Imports (1000 MT)	350	350	500	475	375	500
TY Imp. from U.S. (1000 MT)	2	1	0	0	0	0
Total Supply (1000 MT)	2444	2442	2485	2465	2580	2589
MY Exports (1000 MT)	0	3	0	2	0	0
TY Exports (1000 MT)	0	3	0	2	0	0
Consumption and Residual (1000 MT)	2250	2239	2300	2300	2350	2400
Ending Stocks (1000 MT)	194	200	185	163	230	189
Total Distribution (1000 MT)	2444	2442	2485	2465	2580	2589
Yield (Rough) (MT/HA)	3.3352	3.3355	2.9624	3.4861	3.3419	3.4859
(1000 HA) ,(1000 MT) ,(MT/HA)						
MY = Marketing Year, begins with the month listed at the top of each column						
TY = Trade Year, which for Rice, Milled begins in January for all countries. TY 2025/2026 = January 2026 - December 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

BURKINA FASO

Production

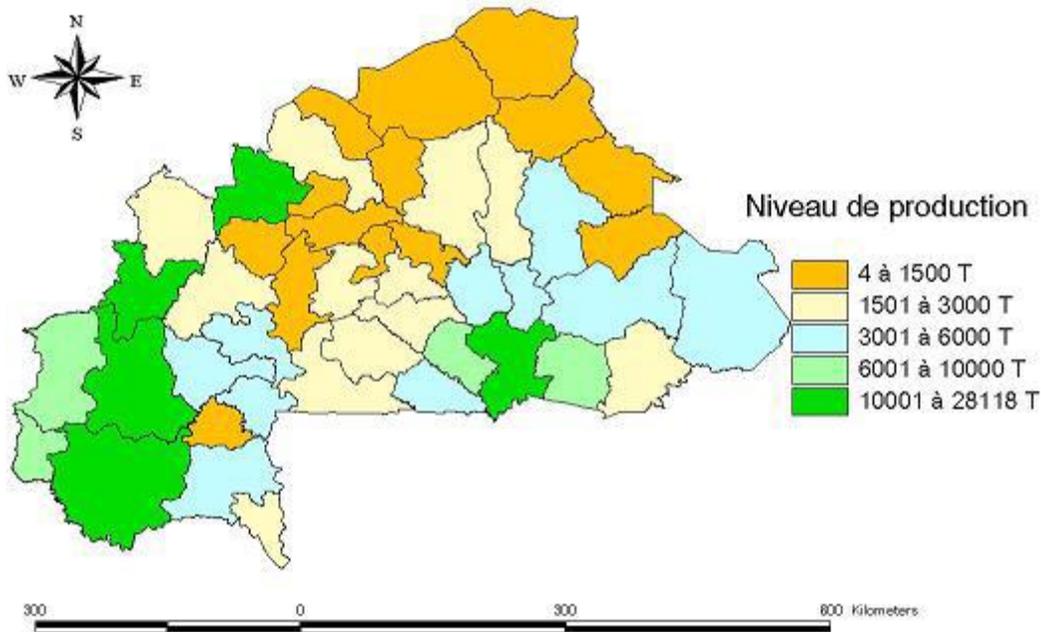
MY 2025/26 rice area harvested is forecast at 270,000 HA, up four percent from the previous marketing year. This is based on an improved security situation that will not prevent farmers from accessing their land. MY 2025/26 milled rice production is also forecast to increase four percent to 455,000 MT on expectation of a favorable rainfall and adequate pest management.

MY 2024/25 area harvested and milled rice production are estimated at 260,000 HA and 438,000 MT, respectively. This represents a ten percent increase in area and a 25 percent increase in production. These estimates are based on contacts with Burkinabe officials.

Rice production in Burkina Faso is located in three ecological zones (irrigated, lowlands and rainfed). Arable land is not fully utilized, with only ten percent of lowlands and 14 percent of the irrigated zone currently used for agriculture. Rice production increases are due mainly to increased development in the lowland and irrigated areas.

Exhibit 2: Burkina Faso Rice Production Zones

Zones de production de riz au Burkina Faso



Source: Government of Burkina Faso

Consumption

MY 2025/26 rice consumption is forecast to increase three percent to 1.33 million MT. MY 2024/25 consumption is estimated at 1.29 million MT, an eleven percent year-over-year increase. These figures are based on population and income growth and good harvest in MY 2024/25.

Rice is the fourth-most consumed cereal in Burkina Faso after sorghum, corn, and millet. Rice is increasingly preferred over other cereals for its ease of cooking and also due to the rising income of the middle class. Consumers prefer mainly 25 percent broken rice and parboiled rice. Buyers with higher incomes reportedly favor 100 percent broken. Rice consumption is higher in the urban centers such as Bobo Dioulasso and Ouagadougou where there are many small restaurants in the informal sector.

In Burkina Faso, rice is processed by parboilers as well as industrial, semi-industrial, and artisanal millers. In 2018, the Government of Burkina Faso estimated the number of parboilers at 35,000, of which 7,000 are organized into cooperatives. The milling rate for parboiled rice is about 70 percent while it is 65 percent for industrial processing.

Trade

Rice is the most imported cereal in Burkina Faso. The rice market is divided between importers, wholesalers, semi-wholesalers, and retailers.

MY 2025/26 rice imports are forecast at 875,000 MT, a three percent increase from the previous marketing year, based on population growth. MY 2024/25 imports are estimated to rise six percent to 850,000 MT on expectations of low international prices, easy access to Indian rice, and rising demand.

Imported rice covers about 70 percent of demand. In Trade Year (TY) 2024 and TY 2025, rice was imported mainly from India, followed by Myanmar, Thailand, and Cote d'Ivoire. Rice is conveyed mainly from the ports of Cote d'Ivoire, Ghana, and Togo. Rice transported through Cote d'Ivoire is typically shipped by truck and/or train.

Stocks

MY 2025/26 and MY 2024/25 rice stocks are both forecast at 150,000 MT based on available supply.

In Burkina Faso, the National Society for the Management of Food Security Stock (SONAGESS) manages stock levels by purchasing rice for the reconstitution of national security stockpiles.

Policy

Burkina Faso continues to implement the second phase of its national strategy for rice development (2021/2030).

For more information, please visit

https://riceforafrica.net/wp-content/uploads/2021/09/burkinafaso_sndr2020-2030.pdf

Since January 1, 2015, ECOWAS member countries, including Burkina Faso, have implemented a common external tariff (CET) which sets specific rates for different product categories. According to contacts, the transitional government is implementing the CET rate of 12.5 percent for imported milled rice.

Burkina Faso: Milled Rice: Production, Supply and Distribution Table

Rice, Milled Market Year Begins Burkina	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	212	235	215	260	220	270
Beginning Stocks (1000 MT)	173	173	145	150	104	150
Milled Production (1000 MT)	328	327	299	438	309	455
Rough Production (1000 MT)	505	503	460	674	475	700
Milling Rate (.9999) (1000 MT)	6500	6500	6500	6500	6500	6500
MY Imports (1000 MT)	794	800	860	850	900	875
TY Imports (1000 MT)	854	850	860	850	900	875
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	1295	1300	1304	1438	1313	1480
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Consumption and Residual (1000 MT)	1150	1150	1200	1288	1225	1330
Ending Stocks (1000 MT)	145	150	104	150	88	150
Total Distribution (1000 MT)	1295	1300	1304	1438	1313	1480
Yield (Rough) (MT/HA)	2.3821	2.1404	2.1395	2.5923	2.1591	2.5926
(1000 HA) ,(1000 MT) ,(MT/HA)						
MY = Marketing Year, begins with the month listed at the top of each column						
TY = Trade Year, which for Rice, Milled begins in January for all countries. TY 2025/2026 = January 2026 - December 2026						
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Attachments:

No Attachments.