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Report Name: Grain and Feed Annual

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Report Highlights:

In MY 2024/25, milled rice production is projected to reach 1.2 million metric tons (MMT), reflecting a five percent increase from MY 2023/24. Post estimates milled rice production for MY 2023/24 at 1.14 MMT, a three percent increase compared to the MY 2022/23 estimate of 1.1 MMT. Stock levels are anticipated to be sufficient to address any short-term supply disruptions. Corn production for MY 2024/25 is expected to remain stable at 1.2 MMT, continuing the trend observed since MY 2022/23. Post forecasts national corn consumption for MY 2024/25 to be 1.17 MMT, with ending stocks expected to be 77,000 MT.

Rice, Milled

Production:

In MY 2024/25, Post projects milled rice production to increase to 1.2 MMT. A five percent increase from MY 2023/24, when milled rice was projected at 1.14 MMT.

Post estimates MY 2023/24 milled rice production at 1.14 MMT based on paddy rice projections, currently at 1.7 MMT. Production is projected to be three percent higher compared to MY 2022/23.

In the current growing season, irrigated rice cultivation represents a mere four percent of the total harvested area, while upland rain-fed rice covers 48 percent. Rice production in lowland floodplains, historically the main contributor to national output, now accounts for 48 percent of the total harvested area, marking an 18 percent increase from the previous season. Notably, the average yield in lowland areas has risen by 9 percent compared to last season, largely due to the Government of Cote d'Ivoire's (GOCI) efforts to revitalize these regions through development projects. These initiatives include the construction of canals, irrigation systems, and drainage infrastructure aimed at enhancing water management. Consequently, these projects have spurred farmers to adopt better land management practices, resulting in improved rice yields.

Total area harvested in MY 2023/24 is expected to reach 730,000 hectares (Ha), a 3 percent increase from MY 2022/23. MY 2023/24 is seeing an increase in average yield for rain-fed upland rice by 5 percent compared to the previous season. This is largely attributed to the accessibility of inputs for farmers facilitated by various initiatives from the GOCI and the increased adoption of good agricultural practices. These subsidized inputs are aimed at enhancing the overall yield of rice cultivation. However, it's crucial to note that rain-fed upland areas heavily rely on rainfall as the primary source of water for crop growth. Hence, fluctuations in rainfall can significantly impact rice cultivation. Moreover, climate variations can also influence the timing of planting and harvesting. In regions experiencing low rainfall, farmers might need to postpone planting until they receive adequate precipitation to ensure sufficient moisture for the crops. Similarly, in areas with high rainfall, farmers may have to harvest earlier to avoid crop damage from excessive water or flooding.

Post expects MY 2024/25 production to be at 1.2 MMT, a 5 percent increase from the current growing season. Post estimates the total area harvested in MY 2024/25 to be 750,000 hectares.

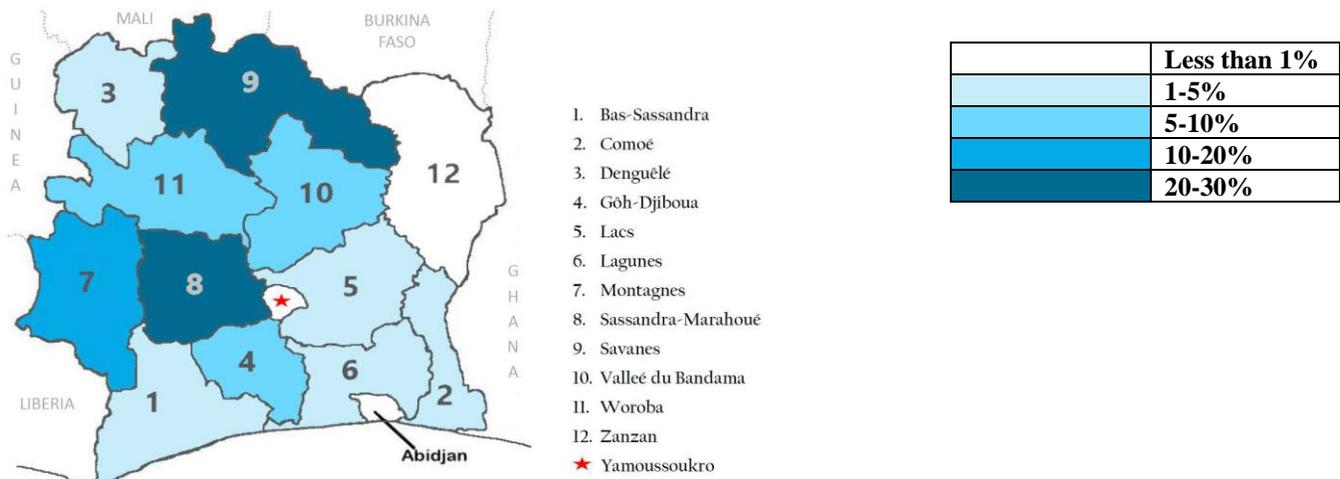
Although lowland and irrigated rice cultivation is prevalent across the country, upland rain-fed rice farming is primarily concentrated in the northernmost districts of Denguélé, Savanes, Vallée du Bandama, and Woroba. The most significant concentration of irrigated rice can be found in the Sassandra-Marahoué and Montagnes districts, yet this method of rice production is not extensively practiced. Rice producers in upland cultivation areas are growing increasingly worried about the unpredictability of rainy seasons and prolonged periods of drought.

While fluctuations in weather and climate change pose significant challenges for rice producers, mounting production costs, primarily driven by the escalating prices of agricultural inputs, have people worried that they will not meet national production goals. During this growing season, the GOCI has subsidized agricultural inputs for farmers, offering fertilizers and pesticides at a price 2.6 times lower than the market rate. This endeavor is poised to sustain rice cultivation and enhance food security among

farmers. The GOCI's interventions throughout the region are not only revitalizing the agricultural sector but also contributing to poverty alleviation in rural areas.

Côte d'Ivoire ranks as the sixth-largest rice producer in Sub-Saharan Africa, following Nigeria, Madagascar, Tanzania, Mali, and Guinea, contributing to nearly 6 percent of the region's agricultural production. It is projected that in the ongoing market year, approximately 53 percent of the national crop will be retained by producers for household consumption or for local community use.

Figure 1 : Domestic Production Zones & Distribution



Share of National Production :

Source: Agence pour le Développement de la Filière Riz en Côte d'Ivoire (ADERIZ)

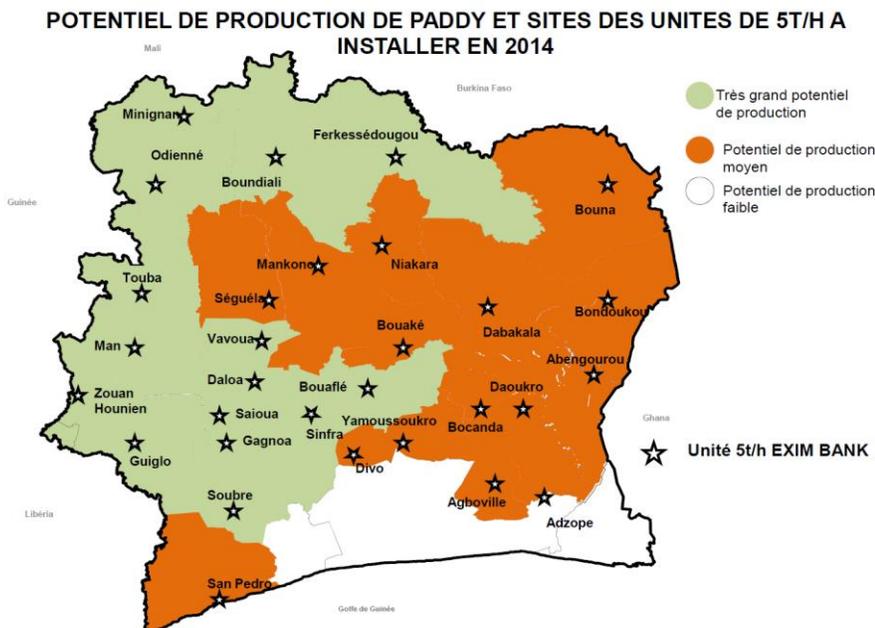
Consumption:

Post projects MY 2024/25 consumption to be stable at 2.5 MMT, unchanged from MY 2023/24.

The GOCI has established a goal to produce 2 million metric tons (MMT) of rice annually by 2025. However, there are concerns that this target will underestimate the country's growing demand for rice in the coming years. Unofficial reports indicate a significant 20 percent increase in per capita rice consumption within the nation over the past decade. According to the FAO, per capita rice consumption is projected to reach 91 kilograms. With a burgeoning population and evolving dietary preferences, this upward consumption trend is expected to persist, underscoring the importance of rice imports for the nation's food security for the foreseeable future.

Despite domestic rice production falling short of meeting national demand, there has been a significant expansion in milling infrastructure, aligning with the government's objective of modernizing and enlarging the sector. In 2014, the government aimed to establish 30 milling facilities capable of processing five tons of paddy rice per hour. Presently, eighteen mills are operational, albeit not at full capacity. Approximately 70 percent of the country's rice production is processed through small milling facilities, each processing less than one ton per hour, as per various sources. The GOCI is currently in the process of establishing ten additional rice milling facilities, each capable of producing five tons of milled rice per hour. It is anticipated that all these new mills will be managed by private companies. Rice consumption is significant in major cities such as Abidjan, Bouaké, Daloa, and Gagnoa.

Figure 2: Production Zones and Milling facilities



★ = milling facilities to be installed

Post projects that modern mills, with a processing capacity of five tons per hour, will require supplementary rough rice to maintain profitability until the national strategy is completely implemented. These mills are operated by a combination of domestic and multinational entities. Among the multinational corporations involved are Louis Dreyfus (LDC), Gan Logis, RMG Concept, and Singapore Agritec. Meanwhile, the two foremost domestic companies, Société Ivoirienne de Riz (SIRIZ) and Agricultural Management Company-Food and Commerce (AMC-FC), stand as the leading national competitors.

Trade:

Post projects MY 2024/25 imports at 1.32 MMT. Post estimates MY 2023/24 imports to be 1.35 MMT, a seven percent decrease from MY 2021/22.

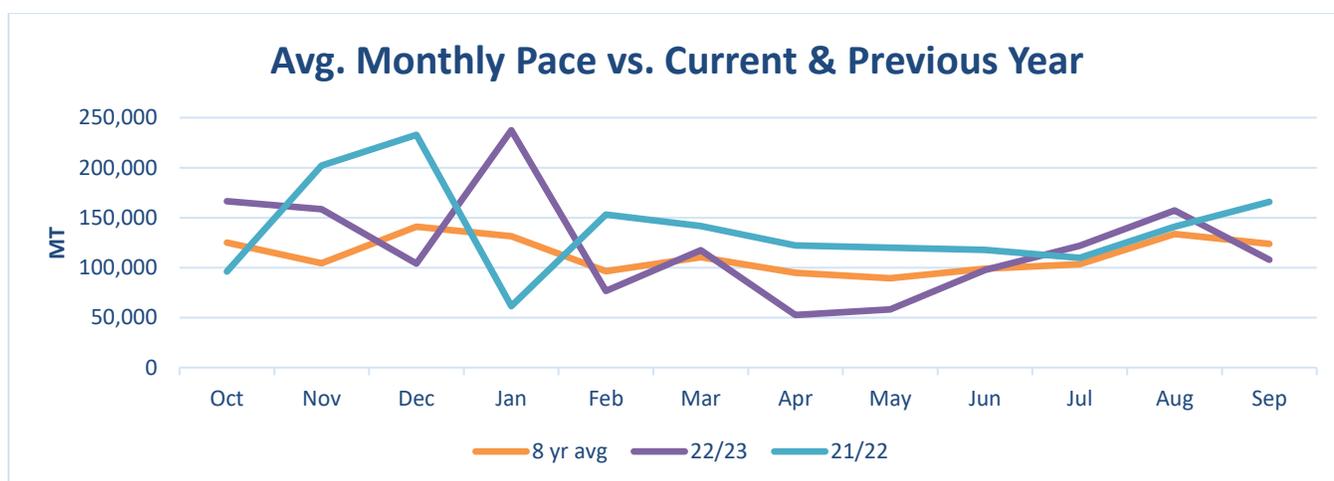
The pace of imports has significantly slowed down in the current year despite production challenges. It is unlikely that this trend will change anytime soon due to the ongoing crisis in Ukraine and high shipping costs.

From October to March of MY 2023/24, imports have decreased 26 percent compared to the same timeframe in MY 2022/23.

Since last year, the supply of rice from Asian countries has become unpredictable. India has also limited exports of non-basmati white rice which is widely consumed in West Africa. India announced export

bans to favor the supply to its domestic market and to curb inflation¹. This regulation may be responsible for the decreased amount of rice entering Cote d'Ivoire. Since the beginning of the current growing season, imports from India have plummeted by 82 percent compared to the same period in MY 2022/23. Meanwhile, during this timeframe, imports from China have been increasing after a significant drop in supply to the country in MY 2022/23, which was only 20 MT. Since October 2023, China has provided over 90,000 MT of milled rice. Additionally, other countries have increased their supply to Cote d'Ivoire since the beginning of the current season. Myanmar, Cambodia, and Thailand have respectively raised their imports by 220 percent, 145 percent, and 637 percent compared to the same period last year. Despite efforts to boost domestic rice production, the country remains heavily reliant on imports. To address the surge in prices in local markets and ensure a stable supply on the national market, the GOCI suspended the export of local rice until December 31, 2023.

Figure 3: Avg. Monthly Pace vs. Current & Previous Year



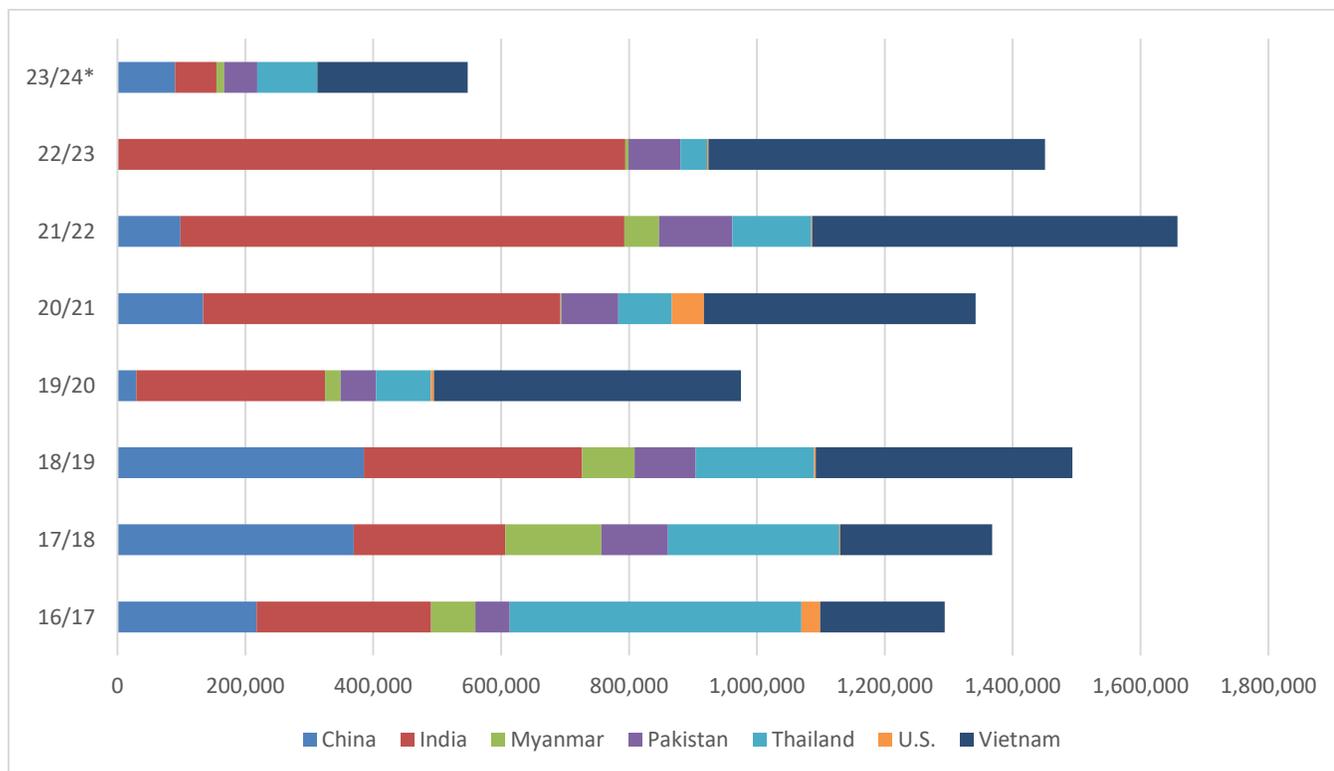
Source : PS&D; *USDA/Post estimates

The implementation of a 20 percent tax on high-quality rice exports and a ban on broken rice exports from India is expected to complicate the supply of rice for many West African countries, including Cote d'Ivoire. This current regulation may also explain the current decrease in imports.

Despite experiencing a decrease in rice imports over the last couple of years, Côte d'Ivoire maintains its position as the sixth-largest rice importer globally, obtaining approximately half of its consumption needs from international sources. The key rice-exporting nations to Côte d'Ivoire include India, Vietnam, Thailand, and more recently, Pakistan and China. In Abidjan, two companies control two-thirds of the country's rice imports, while the Port of Abidjan acts as the primary gateway for rice entering the country.

¹ <https://www.jeuneafrique.com/1495995/economie-entreprises/cameroun-cote-divoire-et-guinee-trio-gagnant-de-lembellie-sur-le-front-du-riz/>

Figure 4: Major suppliers to Cote d'Ivoire (MY, Oct-Sep)



Source: Trade Data Monitor (TDM); *YTD, October 2023 – March 2024

Setting aside monetization and food aid, American rice has been absent from the market for several years due to its high price compared to other alternatives. Nevertheless, rice products bearing an American brand or originating from the U.S. are highly regarded and synonymous with superior quality. Many traders and customers recall a time when American rice was more readily accessible in the local market. However, recent imports have not included rice of U.S. origin.

Aligned with the GOCI’s objective of reaching an annual output of two million metric tons by 2025, the government is aiming to emerge as a significant regional exporter by 2030. However, the volume of paddy rice exported to neighboring countries has significantly declined since MY 2018/19, witnessing an impressive 81 percent decrease since the start of the current marketing year. This decline is primarily attributed to political unrest in some neighboring nations, exacerbated by pandemic-related disruptions that led to border closures. Over the past five years, the export of milled rice from various ports within the country has shown a steady increase, averaging a growth rate of 23 percent. Historically, Mali, Burkina Faso, and Ghana have been the primary importers, with growth rates of 65 percent and 55 percent from MY 2018/19 to MY 2022/23, respectively. However, in the current season, exports to Burkina Faso, Mali, and Ghana have significantly declined by 88 percent, 85 percent, and 100 percent, respectively.

Despite some domestic exports consisting of small volumes of paddy rice informally transported to neighboring nations, significant exports are not anticipated in the near future. Based on current data and the decreased level of domestic production, Post's projections indicate that paddy rice exports for MY 2023/24 will likely be limited to a maximum of 15,000 metric tons.

Stocks:

Post projects MY 2024/25 ending stocks at 125,000 MT. MY 2023/24 ending stocks are estimated at 190,000 MT, down from 267,000 MT in MY 2022/23.

Policy:

In its endeavor to boost domestic production, Côte d'Ivoire has adopted a non-protectionist approach and has refrained from imposing trade restrictions. The GOCI has expressed its desire to compete with imported Asian rice by investing in its own sector and promoting innovation, instead of setting up barriers. The Strategic National Rice Development Plan (SNDR) was initially developed in 2012, with the aim of achieving self-sufficiency in rice production by 2016 through a substantial increase in domestic production and milling capacity. Despite intentions to attain a minimum of 2 MMT of domestic production, the Ivorian government acknowledges that domestic production has remained stagnant in recent years. The rice sector has undergone several changes in the past few growing seasons, with the National de Développement de la Riziculture (ONDR) being replaced by the Agence pour le Développement de la Filière du Riz (ADERIZ). Although ADERIZ is essentially the same organization as its predecessor, it has reportedly been granted increased flexibility to fund activities that align with the 2020-2030 Strategic National Rice Development Plan (SNDR). In September 2019, the Ministry of Rice Promotion (MPR) was established by the Ivorian government to address the various challenges within the sector. However, last year the government announced that the MPR renamed *Direction de la Promotion du Riz* would be integrated into the Ministry of Agriculture and Rural Development (MINADER) and no longer operate as an independent entity.

Despite the SNDR's emphasis on increasing productivity, there are still challenges to overcome, such as facilitating access to better inputs, financing, and infrastructure. To address these issues, the GOCI is finalizing the second phase of the SNDR which might be approved before the end of this year. The SNDR 2 will focus on building a competitive and sustainable rice sector and therefore build upon the progress made under previous plans while rectifying the mistakes of the past. The overarching objectives of the new SNDR are twofold: i) to ensure self-sufficiency in high quality rice; and ii) to establish Côte d'Ivoire as one of the largest African rice exporter.

The struggle to meet national production targets is because small-scale rice producers continue to use a combination of old and low-quality seed with inconsistent fertilizer usage. To improve seed distribution, the GOCI initiated a strategy to develop the seed production sector. In its short existence, the MPR implemented a policy aimed at reducing the multitude of rice varieties in circulation from around a hundred cultivated types to a streamlined selection of 5-7 varieties. This strategic shift was undertaken to standardize the quality of rice reaching factories and various points of sale. The National Agricultural Research Center (CNRA) and the African Rice Center (AfricaRice) ratified this decision with the objective of generating and disseminating high-yielding certified seeds to farmers. In the same vein, GOCI has introduced a new policy with the aim of bolstering seed provision nationally and improving the proficiency of its personnel to ensure more effective distribution of seeds to farmers. This policy will

also kickstart the establishment of seven additional centers dedicated to the production and processing of certified seeds in Yamoussoukro, Gagnoa, Man, Odienné, Korhogo, Bondoukou, and Agboville. Once operational, these centers are projected to supply up to 26,000 metric tons of certified seeds annually, marking a substantial increase from the current 3,500 metric tons available. This surge in availability equates to the development potential of 525,000 hectares of cultivable land over two cropping cycles.

One of the major challenges facing the rice sector is mechanization. Currently, the mechanization rate in Cote d'Ivoire is estimated to be five percent. The government plans to increase mechanization by 30 percent by 2025 and plans to achieve this target by acquiring further investments in infrastructure and equipment, as well as adopting more advanced technologies to improve efficiency and productivity. The GOCI's goal, through the new SNDR, is to make it easier for farmers to access mechanized services to lessen the physical strain of manual labor and make rice farming more appealing. The chosen approach emphasizes providing mechanized services rather than distributing agricultural equipment and machinery to farmers. This strategic change reflects a commitment to modernizing agricultural practices and increasing efficiency in the sector, ultimately promoting sustainable growth and development in rice production. Ultimately, the success of the Ivorian rice sector will depend on a coordinated effort by various stakeholders and international funding to address these and other challenges, while creating an enabling environment for sustainable growth.

Marketing:

Despite the continuous development of modern milling facilities, most milled rice is still processed in small, informal facilities, resulting in low-quality products often lacking formal packaging or branding. In contrast, the supply chain for imported rice is managed by entities with efficient warehousing, purchasing centers, and transportation means. Local rice, however, traverses fragmented and informal supply chains, lacking formal packaging and adequate storage infrastructure, with limited financing options for distributors. Nevertheless, an increasing number of small and medium-sized enterprises (SMEs) have emerged, adopting an integrated approach across the value chain to ensure their rice's quality rivals that of imported varieties. These SMEs have introduced local rice brands, gaining recognition in major supermarkets across Abidjan and other cities. This shift indicates a growing market share for local brands and increased consumer appeal, fostering investment, job creation, and economic growth within the local rice sector.

The preferences for rice consumption vary between urban and rural inhabitants, with urban dwellers showing a preference for imported rice and rural populations favoring local rice. In the global market, broken white rice at 25 percent drives the highest demand, followed by premium quality white rice, aromatic broken rice, and 100 percent aromatic whole rice. Broken rice at 25 percent, finds popularity in rural markets, while urban areas prefer 100 percent whole long-grain white rice and aromatic varieties. Local rice often enjoys a superior reputation for its flavor, purity, and affordability, whereas imported rice is favored for its visual appeal, purity, and consistent availability. Local rice is typically classified into three tiers: deluxe, semi-deluxe, and ordinary, corresponding to grades I, II, and III as per national standards. Enhanced varieties like CY2, GT 11, and M18 are commonly recognized as "deluxe rice." Additionally, specific strains such as JT1-1, Orilux, and Akadi are highly sought after by consumers².

² https://riceforafrica.net/wp-content/uploads/2023/12/Cote-dIvoire_Analyse-Competitivite_07082021.pdf

Production, Supply and Distribution Table:

Rice, Milled	2022/2023		2023/2024		2024/2025	
	Oct 2022		Oct 2023		Oct 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Market Year Begins						
Cote d'Ivoire						
Area Harvested (1000 HA)	720	710	730	730	0	750
Beginning Stocks (1000 MT)	283	283	267	275	0	190
Milled Production (1000 MT)	1108	1112	1131	1140	0	1200
Rough Production (1000 MT)	1705	1711	1740	1754	0	1846
Milling Rate (.9999) (1000 MT)	6500	6500	6500	6500	0	6500
MY Imports (1000 MT)	1456	1515	1450	1350	0	1320
TY Imports (1000 MT)	1313	1475	1400	1300	0	1240
TY Imp. from U.S. (1000 MT)	1	0	0	0	0	0
Total Supply (1000 MT)	2847	2910	2848	2765	0	2710
MY Exports (1000 MT)	30	35	50	25	0	35
TY Exports (1000 MT)	21	36	50	25	0	35
Consumption and Residual (1000 MT)	2550	2600	2550	2550	0	2550
Ending Stocks (1000 MT)	267	275	248	190	0	125
Total Distribution (1000 MT)	2847	2910	2848	2765	0	2710
Yield (Rough) (MT/HA)	2.3681	2.4099	2.3836	2.4027	0	2.4613

(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 2024/2025 = January 2025 - December 2025

Corn,

Production:

For MY 2024/25, Post forecasts corn production to reach 1.2 MMT, maintaining a stable trend since MY 2022/23.

Post's estimates for MY 2022/23 corn production stand at 1.2 MMT, based on current corn projections. The area harvested is estimated to be 540,000 hectares, showing a stable trend since MY 2022/23.

During the ongoing growing season, Post estimates the harvested area to remain at 540,000 hectares.

Corn cultivation is widespread across the country, with surplus production primarily concentrated in the Northern regions where cotton is the main cash crop. Corn ranks as the second most cultivated crop in these areas and is closely tied to cotton production. Cotton farmers who also grow corn, receive various inputs such as fertilizers and pesticides from ginning facilities which they can use for the production of corn. Corn production maintains a significant presence in agricultural holdings and land allocation. With cotton production projected to rebound from the disastrous results of the previous year's growing season, Post anticipates that cotton producers will refrain from expanding their corn production area. Post estimates that the area devoted to corn production will remain unchanged.

Consumption:

Post forecasts national consumption of corn for MY 2024/25 to be at 1.17 MMT a five percent increase from MY 2022/23.

Post expects national corn consumption to be stable at 1.1 MMT for MY 2023/24, unchanged from the 2022/23 growing season.

After several months of banning the export of essential food items, such as corn³, the GOCI has now softened these restrictions. The restriction to export was part of the government's efforts to curb the rise in prices for these food items and to ensure a steady supply in the domestic market. While this restriction has been lifted, the export of various products now requires prior authorization from the Ministry of Commerce before being shipped to neighboring countries. The lifting of the ban is anticipated to reinvigorate corn exports to neighboring countries and stimulate demand.

Up to 60 percent of the total corn supply is used for human consumption, primarily by the farmers themselves. The corn market is extremely active, allowing farmers the flexibility to decide whether to consume their own crops, store it for future use, or sell it in large quantities for profit.

Around 40 percent of the total corn supply is allocated for feed consumption. Industrial usage of corn, excluding animal feed, remains relatively low, with major industrial buyers acquiring less than five

³ <https://www.gouv.ci/doc/1705490227Avis-portant-suspension-temporaire-d-exportation-des-produits-vivriers.pdf>

percent of the total production. However, there is significant potential for increasing local industrial demand, especially if more producers can meet the specific quality requirements for the industrial sector.

Trade:

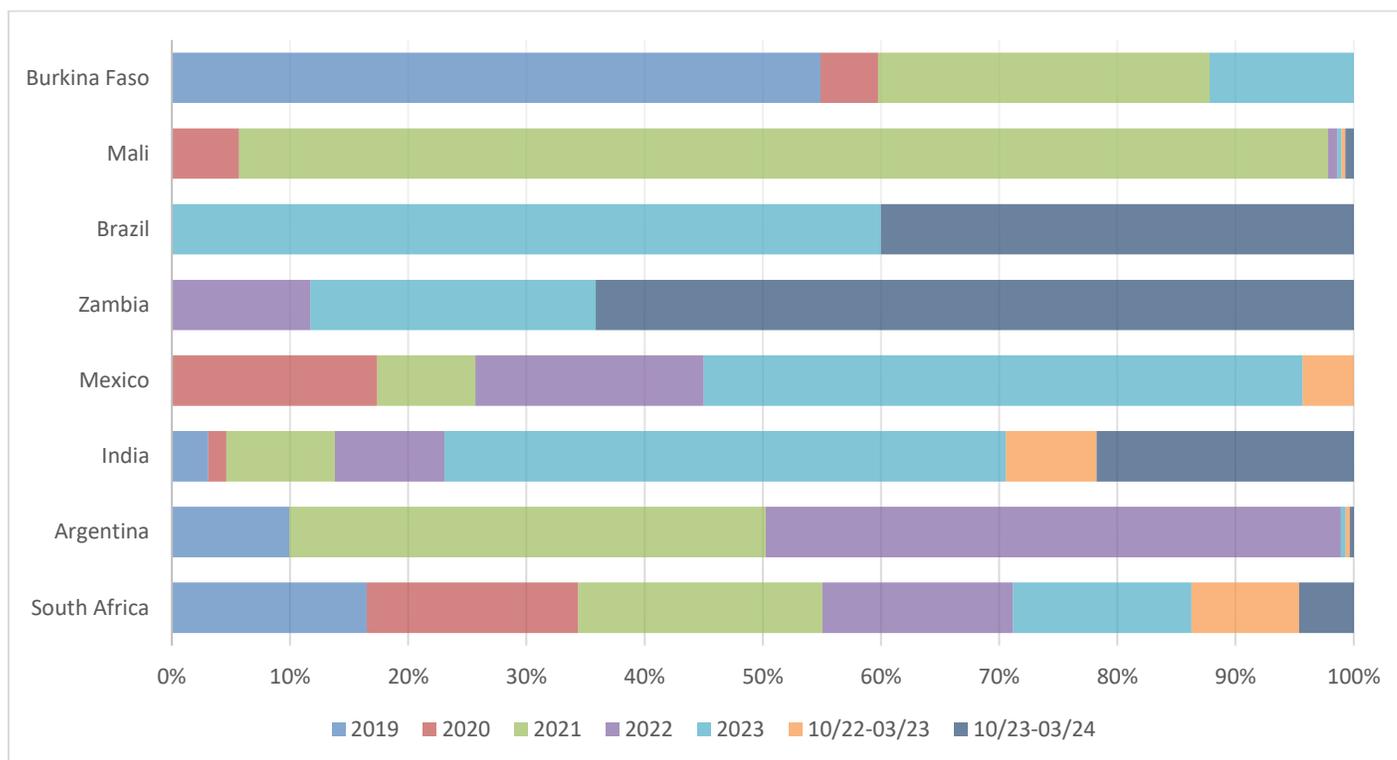
Post projects MY 2024/25 imports at 5,000 MT, a 20 percent decrease from MY 2022/23 estimate of 6,000 MT.

Until 2023, most corn imports came from Argentina, comprising of up to 80 percent of the total market share over the past five years. However, since MY 2022/23, imports from Argentina decreased by nearly 100 percent due to the worst drought the country had experienced in the last 60 years. For the current growing season, Post anticipates that, at most, Argentina will not export a significant amount of corn to Cote d'Ivoire. South Africa is a significant supplier of corn to Cote d'Ivoire, however, since the beginning of the current season, the amount of corn supplied from South Africa has dropped by 50 percent compared to the same period in the previous marketing year (October 2022-March 2023). This decline is due to South Africa's reduced corn export estimate, which is expected to decrease by 12 percent⁴. Meanwhile, India emerged as the third-largest supplier of corn to Cote d'Ivoire in MY 2022/23, providing 620 MT. India is expected to increase its share of imports to the country this year, nearly tripling its corn supply to Cote d'Ivoire since the beginning of the current marketing year compared to the same period in the previous marketing year.

Post expects MY 2023/24 imports to be at 4,000 MT, a 30 percent decrease compared to MY 2022/23. Overall annual imports remain marginal and are only used to satisfy specific quality requirements for industrial purposes.

⁴ [South Africa 2023-24 Corn Export Estimate Lowered 12% | Morningstar](#)

Figure 5: Historical Share of corn imports to Cote d’Ivoire 2019-2023 (Oct-Sept)



Source: Trade Data Monitor (TDM)

Post projects MY 2024/25 exports at 75,000 MT, a 25 percent decrease from MY 2022/23 estimate of 101,000 MT. Post expects MY 2023/24 exports to be at 70,000 MT, a 30 percent decrease compared to MY 2022/23.

Prior to suspending corn exports to neighboring countries, the country sets a record in the marketing year 2022/23 by exporting 101,000 metric tons of corn, nearly doubling its annual average. This was due to high demand from Burkina Faso, (up 230 percent from MY 2021/22) and Senegal (up 275 percent in the same timeframe). Weather related shocks in Sahelian countries (Senegal, Mali, Burkina Faso, Niger) and their heavy reliance on dry cereals makes the corn market there especially vulnerable and makes Ivorian corn more attractive in the region.

Over the last five years, Niger, Burkina Faso and Senegal have been the three majors destinations for corn originating from Cote d’Ivoire.

Stocks:

Post anticipates that ending stocks will amount to 77,000 MT for MY 2024/25, whereas the stocks for MY 2023/24 are estimated at 117,000 MT. The decline in exports to neighboring countries since MY 2023/24, stemming from the GOCI's export restrictions, justifies the increase in stocks for this current season.

Policy:

Historically, the corn industry has been a low priority for the GOCI. Corn is primarily used for human consumption in rural areas but play's a significant role in the animal feed market which accounts for roughly 25 percent of the national demand⁵. Nevertheless, in recent years, the government has taken steps to rejuvenate the sector. Various revitalization programs within the food sector now incorporate corn cultivation. Furthermore, the government aims to tackle seed-related challenges in the sector. Despite the availability of numerous corn varieties developed by CNRA, the procurement of improved corn seeds through research initiatives remains relatively uncommon.

Marketing:

The trade of corn in Côte d'Ivoire predominantly operates through traditional commercial channels, characterized by informal transactions built on trust. This structure benefits producers by offering a diverse array of outlets and facilitating smooth product distribution. Approximately 25 to 75 percent of corn producers participate in informal commercial activities. The cultivation of cotton and the accessibility of road networks are key components for commercial corn production. Buyers include farmers, local factories, and small local processing units. Prices generally remain steady, ranging between \$0.19 and \$0.22/kg at farm gate, and between \$0.20 and \$0.23/kg in production zones. Wholesale prices in urban areas fluctuate between \$0.22 and \$0.66/kg, while retail prices range from \$0.33 to \$0.66/kg.

⁵ https://www.nitidae.org/files/cfd69c6f/diagnostic_de_la_filiere_mais_en_cote_d_ivoire_rongead_2014.pdf

Production, Supply and Distribution Table:

Corn	2022/2023		2023/2024		2024/2025	
	Oct 2022		Oct 2023		Oct 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Market Year Begins						
Cote d'Ivoire						
Area Harvested (1000 HA)	540	540	540	540	0	540
Beginning Stocks (1000 MT)	108	108	93	93	0	117
Production (1000 MT)	1200	1200	1200	1200	0	1200
MY Imports (1000 MT)	6	6	40	4	0	5
TY Imports (1000 MT)	6	6	40	4	0	5
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	1314	1314	1333	1297	0	1322
MY Exports (1000 MT)	101	101	75	70	0	75
TY Exports (1000 MT)	101	101	75	70	0	75
Feed and Residual (1000 MT)	70	70	70	310	0	320
FSI Consumption (1000 MT)	1050	1050	1100	800	0	850
Total Consumption (1000 MT)	1120	1120	1170	1110	0	1170
Ending Stocks (1000 MT)	93	93	88	117	0	77
Total Distribution (1000 MT)	1314	1314	1333	1297	0	1322
Yield (MT/HA)	2.2222	2.2222	2.2222	2.2222	0	2.2222

(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 Corn begins in October for all countries. TY 2024/2025 = October 2024 - September 2025

Wheat,

Production

Côte d'Ivoire does not produce any wheat. The country imports all the wheat used on the market.

Domestic Consumption:

Post predicts that the consumption of wheat in MY 2024/25 will reach 720,000 MT, which represents a 3 percent increase from MY 2023/24 estimate of 700,000 MT. Post forecasts that the consumption of wheat in MY 2024/25 will reach 630,000 MT, reflecting an 8 percent increase from MY 2022/23.

Despite not producing wheat locally, Côte d'Ivoire imports a significant amount of wheat each year for local processing and use in its thriving bakery sector. The French bread, or "baguette," is a daily staple for Ivorians and remains the star product of the industry. The bakery sector has been growing rapidly, with an estimated 2,000 bakeries in the country, half of which are situated in Abidjan. This expansion can be attributed, in part, to the emergence of the Ivorian middle class, which is estimated to comprise of at least 26.4 percent of the population⁶. As this demographic adopts consumption patterns and lifestyles similar to those of other emerging countries, the bread industry is poised to continue growing in line with the dynamic economic development of Côte d'Ivoire.

Over the past decade, the consumption of wheat-based products, either in the bakery or as derived products, has been on the rise in Côte d'Ivoire. The FAO reports that wheat consumption has increased by up to 24 percent between 2016 and 2020. Post expects this trend in wheat consumption to continue for at least the next few years.

Marketing

Currently, the wheat flour industry in Côte d'Ivoire is dominated by three major players. *The Grands Moulins d'Abidjan* (GMA), which was acquired by the American multinational Seaboard Corporation in 2017 and remains a key player in the Ivorian flour market. However, since the early 2010's, they have been joined by two additional millers: *Les Moulins de Côte d'Ivoire* (LMCI), owned by the Ivorian company Avos, and *Les Moulins Modernes de Côte d'Ivoire* (MMCI) owned by Carre d'Or. Together, these three companies control a market that represents over 600,000 MT of wheat per year⁷.

Furthermore, the sector is still growing: Two other companies are preparing to enter the Ivorian market, therefore increasing the total local capacity of processing wheat into flour.

Trade

As a result of the Russian-Ukrainian war, the country has learned to diversify the countries from which it imports wheat. Since MY 2021/22, new suppliers have appeared, including Germany, Poland, Romania, and the Baltic States (Estonia, Latvia, Lithuania). France has historically been the primary

⁶ <https://www.fratmat.info/article/211267/conomie/filiere-boulangeriepatisserie-le-gouvernement-encourage-1039investissement-dans-ce-secteur-d039activite>

⁷ <https://www.jeuneafrique.com/1379672/economie/cote-divoire-farine-entre-seaboard-et-carre-dor-la-guerre-des-moulins-a-son-comble/>

source of wheat, however, France's market share is diminishing. Since the beginning of the marketing year, import from the country dropped by 17 percent compared to MY 2022/23. This might be due to the slight downturn in wheat production where excess moisture has slowed wheat sowings, while localized droughts are currently affecting cultivated areas⁸.

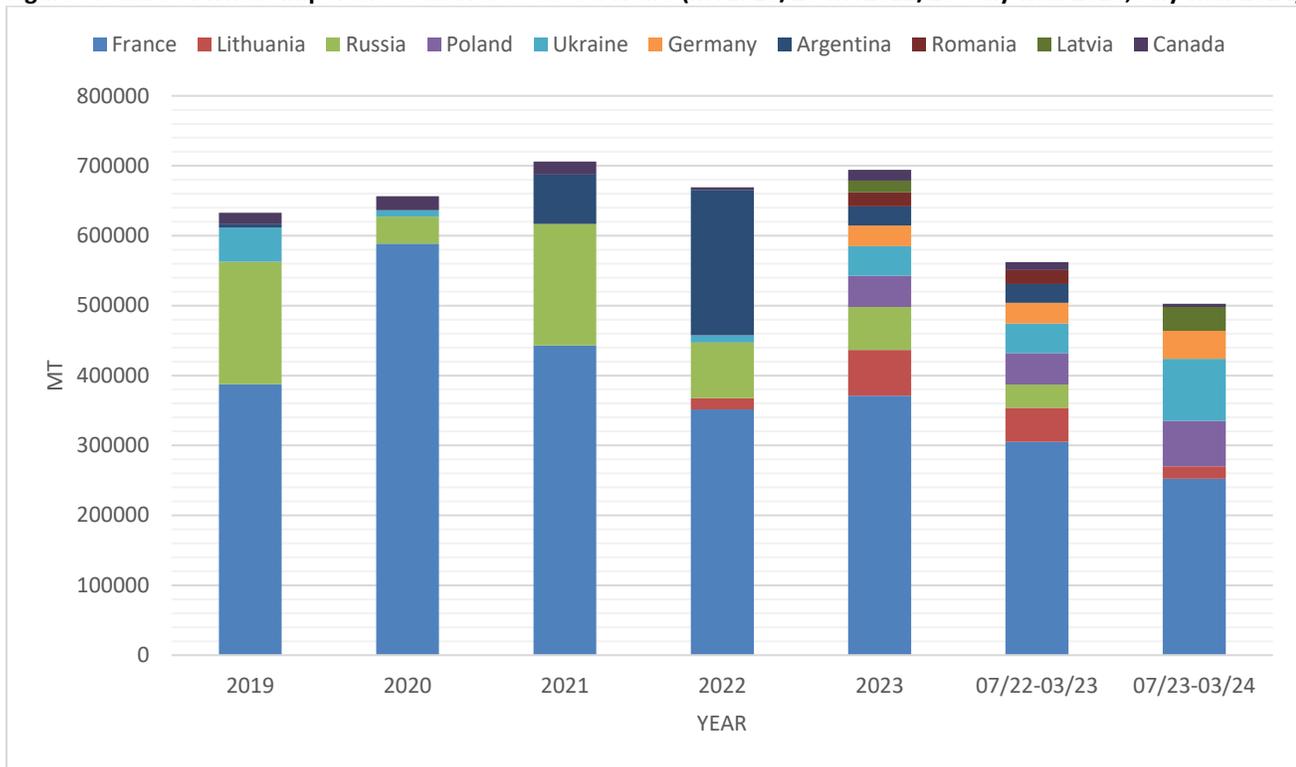
There has been a decrease of over 60 percent in wheat exports from Russia to Côte d'Ivoire since MY 2020/21. This may be attributed to the political tensions and economic sanctions arising from the Ukraine-Russia crisis. Meanwhile, Ukraine's wheat imports to the country increased from 10,000 MT in MY 2021/22 to 42,405 MT in MY 2022/23. Since the beginning of this marketing year, wheat imports from Ukraine reached 88,000 MT, a 100 percent increase year over year so far.

Lithuania has emerged as a new major exporter of wheat to the country in MY 2022/23, with reports indicating that it has shipped over 65,000 metric tons of wheat to the Port of Abidjan. However, since the beginning of MY 2023/24, import from Lithuania dropped to 60 percent. Canada has also increased its wheat exports to the country since the start of the Ukrainian crisis.

While Argentina has been the second biggest exporter of wheat for MY 2021/22, the amount shipped has dropped by 85 percent during MY 2022/23. One reason for the drop is due to drought which affected overall production.

⁸ [Bulletin de la FAO sur l'offre et la demande de céréales | Organisation des Nations Unies pour l'alimentation et l'agriculture](#)

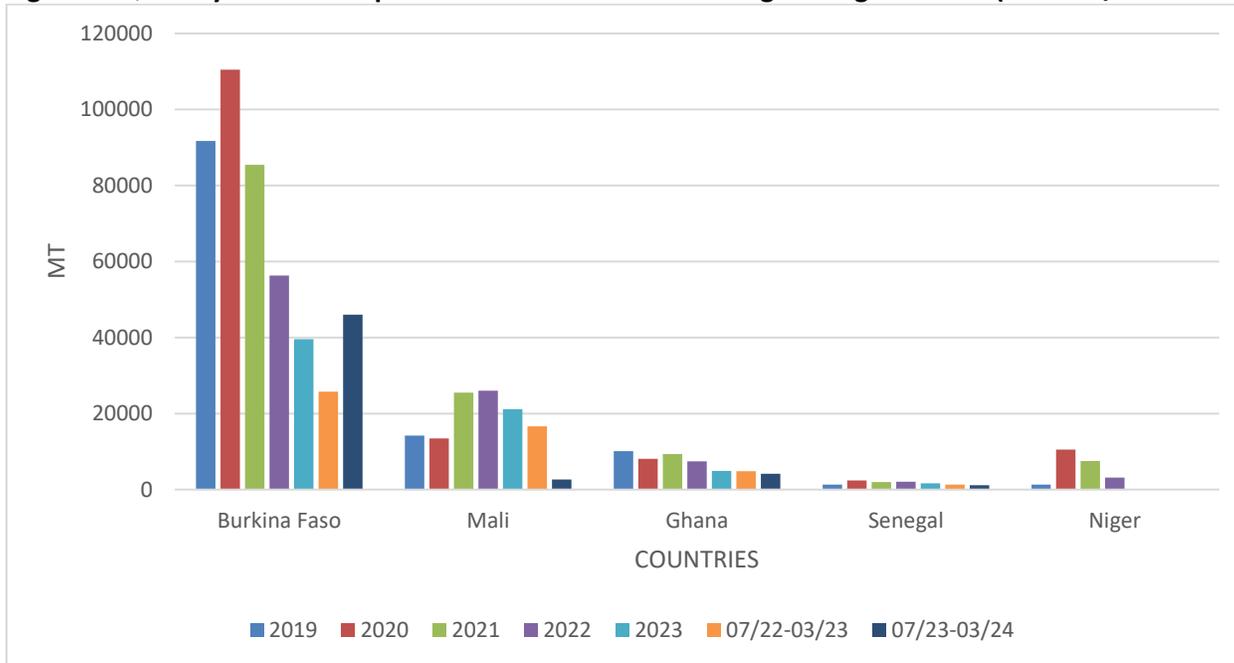
Figure 6: Share of wheat importers countries to Côte d'Ivoire (MY2019/20-MY2022/23- July-Mar 2023, July-Mar 2024)



Source: Trade Data Monitor (TDM)

Although the country typically imports more than 650,000 MT of wheat each year, a portion is being transshipped to other countries in the region. Burkina Faso remains the largest recipient of wheat from Côte d'Ivoire, with more than 38,000 MT being imported from the country for MY 2022/23. Mali and Ghana are also significant importers of wheat from Abidjan, with 21,000 MT and 5,000 MT being exported annually, respectively.

Figure 7: Quantity of wheat exported from Côte d'Ivoire to neighboring countries (MY2018/19-MY2022/23)



Source: Trade Data Monitor (TDM)

Policy

It is important to note that the war in Ukraine has had economic repercussions on Côte d'Ivoire. Due to the disruption of the global market, cereal prices increased, leading the Ivorian government to initially grant a subsidy to millers to import wheat flour. Currently, the elimination of tariffs between Côte d'Ivoire and the European Union (EU-CI) through the EU-CI Economic Partnership Agreement (EPA) will reduce import tariff barriers and therefore boost the wheat sector's competitiveness.

The raise in wheat flour prices over the last three years due to the Ukraine-Russian war encouraged Ivorian's to increase production of locally produced products in bread-making. The National Committee to Fight against High Cost of Living (CNLVC) launched a campaign to promote "buy local" in October 2022, encouraging the use of cassava and corn flour in bread-making. By using local products in bread-making, the government aims to support local farmers and processing businesses, provide benefits for the local economy, and offer consumers affordable products less sensitive to international wheat prices. However, it should be noted that these measures are often costly for the government, which must find sustainable ways to finance them in the long term.

Production, Supply and Distribution Table:

Wheat	2022/2023		2023/2024		2024/2025	
	Jul 2022		Jul 2023		Jul 2024	
Market Year Begins						
Cote d'Ivoire	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	130	130	160	160	0	170
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	678	678	700	700	0	720
TY Imports (1000 MT)	678	678	700	700	0	720
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	808	808	860	860	0	890
MY Exports (1000 MT)	68	68	100	70	0	70
TY Exports (1000 MT)	68	68	100	70	0	70
Feed and Residual (1000 MT)	0	0	0	0	0	0
FSI Consumption (1000 MT)	580	580	600	620	0	630
Total Consumption (1000 MT)	580	580	600	620	0	630
Ending Stocks (1000 MT)	160	160	160	170	0	190
Total Distribution (1000 MT)	808	808	860	860	0	890
Yield (MT/HA)	0	0	0	0	0	0

(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 Wheat begins in July for all countries. TY 2024/2025 = July 2024 - June 2025

End of Report

Attachments:

No Attachments