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Report Highlights:

FAS Abidjan, Accra (Post) sees the Côte d'Ivoire government's supports, improved inputs, and irrigation investments helping to boost rice production yields. Post forecasts Côte d'Ivoire's milled rice production in market year (MY) 2025/2026 (October-September) at 1.6 million metric tons (MMT), up 6.7 percent from the MY 2024/2025 estimate of 1.5 MMT. Post foresees rice area harvested at 810,000 hectares, up 2.5 percent. Ivorian rice consumption is forecast in MY 2025/2026 at 2.95 MMT, up from the MY 2024/2025 estimate of 2.85 MMT. While Côte d'Ivoire aims to achieve rice self-sufficiency by 2026, rice imports will remain critical in the near-term. Post projects rice imports in MY 2025/2026 still at a hefty 1.6 MMT. Côte d'Ivoire is seeking to commence exporting domestically produced rice by 2030; focusing to expand milling capabilities, increase mechanization, and better input distribution.

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EXECUTIVE SUMMARY

FAS Abidjan, Accra (Post) forecasts Côte d’Ivoire’s market year (MY) 2025/2026 (October-September) domestic milled rice production at 1.6 million metric tons (MMT), up 6.7 percent from the MY 2024/2025 estimate of 1.5 MMT. The increase is due to the Ivorian government’s intervention, that aims to boost domestic rice output. Key measures include large-scale distribution of subsidized agricultural inputs, such as improved seeds, fertilizers, and the provision of pesticides at below-market rates.

MY 2025/2026 rice exports are forecast at 35,000 metric tons (MT), up 75 percent from the MY 2024/2025 estimate of 20,000 MT. The surge results from greater availability of domestic surpluses for export. There is demand from neighboring countries hankering for regionally produced rice. At the same time, MY 2025/2026 rice imports at 1.6 MMT, are down three percent from the MY 2024/2025 estimate of 1.65 MMT. Rice imports will drop slightly due to greater domestic production combined with milling upgrades. This may herald a trend for lower imports over time. In MY 2024/2025 (October-January), imports of American rice are at 10,312 MT, up from just 1 MT during the same period last year.

Côte d’Ivoire is boosting its domestic rice production by investing in market-driven modernization. The Strategic National Rice Development Plan (SNDR 2024-2030) targets self-sufficiency by 2026, it seeks to make the country a net rice exporter by 2030. Since the SNDR’s launch in 2012, production has improved but remains below the 2 MMT target. Recent reforms include the replacement of the National Office for the Development of Rice Farming (*Office National de Développement de la Riziculture* - ONDR) with the [Agency for the Development of the Rice Sector](#) (*Agence pour le Développement de la Filière Riz* - ADERIZ).¹ Also, the former Ministry of Rice Promotion is now integrated in the [Ministry of Agriculture and Rural Development](#) (*Ministère de l’Agriculture et du Développement Rural* – MINADER), to enhance national coordination and flexibility.²

Challenges remain (e.g., low-quality seeds, limited irrigation, low mechanization levels, and poor access to finance). The SNDR 2024-2030 addresses these through investment in land development, input distribution, and post-harvest infrastructure. Through the [National Center of Agronomic Research CNRA](#) (*Centre National de Recherche Agronomique* - CNRA) and [AfricaRice](#), the government is standardizing rice varieties to five-to-seven high-yield types.³ There are now seven certified seed centers (26,000 MT capacity). Pertaining to mechanization, the goal is to go from five percent to 30 percent by 2025; by prioritizing access to mechanized services over direct equipment provision. The transformation depends on coordinated public-private efforts, with the SNDR 2024-2030 serving as the roadmap.

¹ See, Agency for the Development of the Rice Sector (ADERIZ), located at: <https://www.aderiz.ci/fr/qui-sommes-nous>.

² See, Ministry of Agriculture and Rural Development (MINADER), located at: <https://www.agriculture.gouv.ci/>.

³ See, National Center of Agronomic Research (CNRA), located at: <https://cnra.ci/>. See, AfricaRice, located at: <https://www.africarice.org/>.

COMMODITY

RICE

Table 1: Côte d'Ivoire, Production-Supply-Distribution (PSD)

Rice, Milled	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
Cote d'Ivoire	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	730	730	730	790	0	810
Beginning Stocks (1000 MT)	354	354	344	354	0	634
Milled Production (1000 MT)	1308	1308	1300	1500	0	1600
Rough Production (1000 MT)	2012	2012	2000	2308	0	2462
Milling Rate (.9999) (1000 MT)	6500	6500	6500	6500	0	6500
MY Imports (1000 MT)	1457	1457	1700	1650	0	1600
TY Imports (1000 MT)	1616	1616	1650	1600	0	1550
TY Imp. from U.S. (1000 MT)	30	30	0	20	0	20
Total Supply (1000 MT)	3119	3119	3344	3504	0	3834
MY Exports (1000 MT)	25	15	35	20	0	35
TY Exports (1000 MT)	25	15	35	20	0	35
Consumption and Residual (1000 MT)	2750	2750	2850	2850	0	2950
Ending Stocks (1000 MT)	344	354	459	634	0	849
Total Distribution (1000 MT)	3119	3119	3344	3504	0	3834
Yield (Rough) (MT/HA)	2.7562	2.7562	2.7397	2.9215	0	3.0395

(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.

PRODUCTION

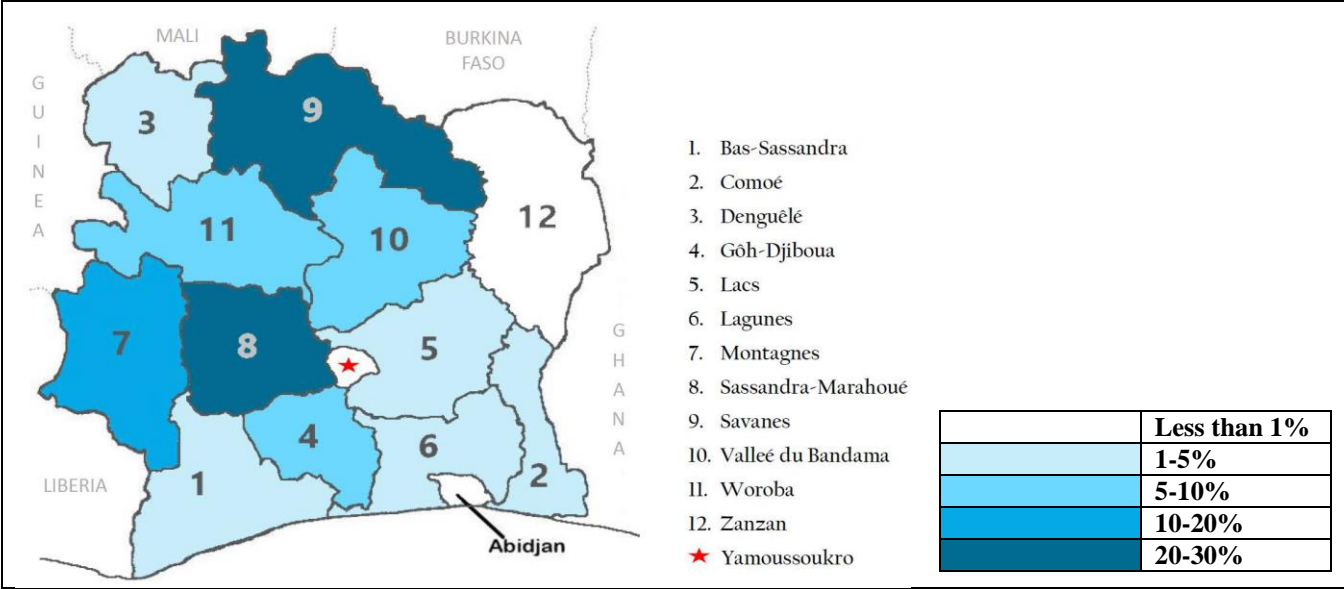
FAS Abidjan, Accra (Post) forecasts Côte d'Ivoire's market year (MY) 2025/2026 (October-September) domestic milled rice production at 1.6 million metric tons (MMT), up 6.7 percent from the MY 2024/2025 estimate of 1.5 MMT. Post attributes the increase to the Ivorian government's intervention aiming to boost domestic rice output. Key measures include large-scale distribution to farmers of subsidized agricultural inputs, such as improved seeds, fertilizers, and the provision of pesticides at below-market rates.

Area Harvested: FAS Abidjan, Accra forecasts MY 2025/2026 area harvested at 810,000 hectares, up 2.5 percent from the MY 2024/2025 estimate of 790,000 hectares.

Production Yield Improvements Spur Rice Crop Up and Beyond: Ivorian rice production is growing thanks to improving yields. In calendar year (CY) 2024 (January-December) average yields across the country reached 4.8 metric tons (MT) per hectare in the irrigated production zones; up by four percent from CY 2023's average yields. While yields in the lowland plains rose to about 3.9 MT per hectare, up five percent; the upland rain-fed production zone yields declined to 1.63 MT per hectare, a drop of four percent. Overall, yields in MY 2024/2025, are coming in at around 2.9 MT per hectare.

Ivorian government initiatives are facilitating farmers’ access to quality agricultural inputs, as well as helping with the adoption of good agricultural practices (GAPs).⁴ Ivorian subsidy programs are assisting small farmers’ access to more affordable (i.e., less costly) inputs, permitting for more intensive and productive cultivation methods. The Ivorian government is also stepping up training and extension services promoting improved agronomic techniques. Efforts are largely concentrated in the lowland and irrigated production zones.

Map 1: Côte d’Ivoire, Rice Production Zones and Distribution



Source: Agence pour le Développement de la Filière Riz en Côte d’Ivoire (ADERIZ); FAS Abidjan, Accra office research.

Production, Rice Milling: Seventy percent of domestically produced rice is processed in artisanal mills; operating with a capacity of less than 1 MT per hour. This illustrates the fragmented, low efficiency nature of rural rice milling. FAS Abidjan, Accra is only able to ascertain the current operational status of 14 out of 30 rice mills (of the state planned) operating with a capacity of 5 MT per hour; their utilization rates, however, remain unclear. Post understands that the larger rice mills are processing around two percent of rough (paddy) rice. The medium-capacity mills with 2 MT per hour capabilities, are milling 43 percent of the total rough (paddy) rice volume. Post interprets the situation as a transitional phase; with rice milling becoming focused around more efficient, though still limited, processing units.

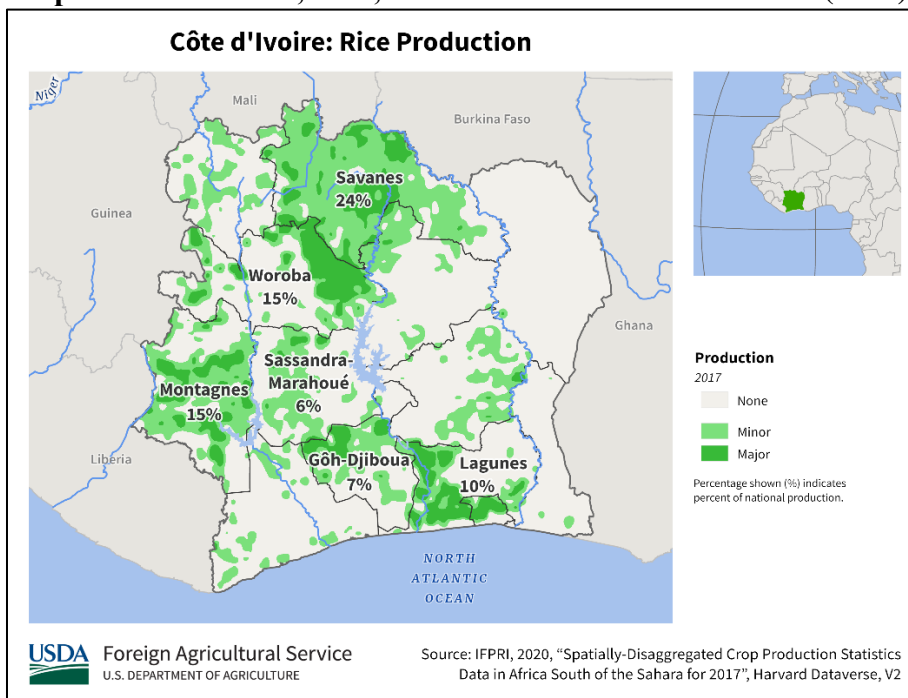
Production, Rice Distribution: Despite the growing number of modern milling facilities, a significant portion of domestic rice remains processed in small-scale, informal mills, resulting in variable quality and inconsistent packaging. In contrast, imported rice benefits from well-structured supply chains, efficient warehousing, and established branding. Local rice often moves through fragmented and

⁴ In general, good agricultural practices (GAPs) are a set of principles, regulations and technical recommendations applicable to production, processing and food transportation. These address health, the environment, and farmer work conditions. GAPs seek to improve food security, promote the rational handling of agro-chemicals, better animal care and feeding, while seeking to produce higher quality, healthy food to improve nutrition and food consumption. See, UN Food and Agricultural Organization (FAO) Knowledge Repository, “Training Manual – Good Agricultural Practices (GAP) Guidelines,” located at: <https://openknowledge.fao.org/server/api/core/bitstreams/7a2a6f85-0c6e-432c-8fce-cb53c43d4cda/content>.

informal distribution networks, lacking standard packaging and adequate storage infrastructure, while financing options for distributors remain limited.

However, the landscape is evolving. An increasing number of small and medium-sized enterprises (SMEs) are adopting an integrated approach across the value chain to ensure local rice competes with imported varieties in terms of quality and branding. These SMEs have successfully introduced locally branded rice, making these available in major supermarkets across Abidjan and other urban centers. This shift signals a growing market share for local brands, enhancing consumer confidence, encouraging investment, and creating new employment opportunities within the domestic rice sector.

Map 2: Côte d'Ivoire, Rice, Percent of National Production (2017)



Source: U.S. Department of Agriculture (USDA)/FAS Rice Explorer; FAS Abidjan, Accra office research.

Irrigation Investment and Rehabilitation: There is ongoing renewed investment underway to improve water management targeting expanded rice cultivation. Investments in infrastructure include the rehabilitation of 715 hectares in the Korhogo (in the Savanes district in northern Côte d'Ivoire) and the construction of a 120 hectares dam in Didiévi (in the Béliér region in central Côte d'Ivoire).

Irrigation Systems: Ivorian rice cultivation systems include: 1) lowland rain-fed (floodplain); 2) upland rain-fed farming; and 3) irrigated systems. Lowland rain-fed production is dominant, accounting for 53 percent of the total area harvested, and is up 23 percent from the previous year. Post sources comment that lowland systems retain potential for expansion with investment in water control systems. At the same time, upland rain-fed farming (covering 43 percent of the production area in the north), is increasingly vulnerable to erratic, shifting weather patterns and droughts. Nonetheless it retains a widespread footprint, especially among small farmers due to low-cost production. Irrigated systems, with their high investment costs and infrastructure constraints, are limited to four percent of the cultivated lands but do offer some of the highest yields available in the country.

CONSUMPTION

FAS Abidjan, Accra forecasts Côte d'Ivoire's MY 2025/2026 rice consumption at 2.95 MMT, up three percent from the MY 2024/2025 estimate of 2.85 MMT. Ivorian rice consumption is growing at three-to-four percent per annum. Growth is due to a combination of population growth alongside shifting dietary preferences. Ivorians are favoring rice over traditional staple foods (e.g., cassava and cocoyam).

Urban centers Abidjan, Bouaké, Daloa, and Gagnoa are major rice consumption locales. Post is also detecting growth in rural area consumption. This trend stems from greater market connectivity, expanded transport networks, and the government promoting rice as a strategic food crop. Sources indicate Ivorian per capita rice consumption at 84 kilograms (kg), premised on a milled rice demand of 1 MMT. Two decades ago, per capita consumption was 58 kg. This upward trend in consumption will continue bolstered by population growth, urbanization, and the greater place for rice in household diets.⁵

Rice Consumption Patterns, Quality Grades: Consumption patterns vary by location. Urban consumers tend to prefer imported rice due to its uniform quality and polished appearance, while rural populations favor locally produced rice for its affordability and natural taste. In the domestic market, rice is categorized into three quality tiers: 1) deluxe; 2) semi-deluxe; and 3) ordinary. These correspond to national quality grades I, II, and III. Among premium varieties, CY2, GT11, and M18 are recognized as “deluxe rice,” offering superior taste and texture. Additionally, strains such as JT1-1, Orilux, and Akadi are increasingly sought after by consumers. Market trends also show a rising demand for aromatic and long-grain rice varieties, reflecting evolving consumer preferences.

Rice Marketing: U.S.-origin rice is valued for its high quality, cleanliness, and consistency. With Côte d'Ivoire's MY 2025/2026 consumption foreseen at 2.95 MMT, coupled with reliance on imports, there is room for additional U.S. rice exports. Post sees possibilities for the hotel-restaurant-institutional (HRI) sector's high-end hotels and restaurants, as well as the targeting of more affluent consumers that favor quality rather than prioritize prices. While price sensitivity remains a feature of the broader Ivorian market, the positive perception of American rice supports its presence in value-added, niche markets.

TRADE

Exports: FAS Abidjan, Accra forecasts Côte d'Ivoire's MY 2025/2026 rice exports at 35,000 MT, are up 75 percent from the MY 2024/2025 estimate of 20,000 MT. Post attributes the surge to the greater availability of domestic surpluses for export. There is also a growing demand in neighboring countries, hankering for more regionally produced rice at a lower cost.

Côte d'Ivoire is a regional rice supplier. During the first four months of MY 2024/2025, intraregional (i.e., West Africa) rice exports fluctuated widely. While shipments to Burkina Faso surged by over 3,000

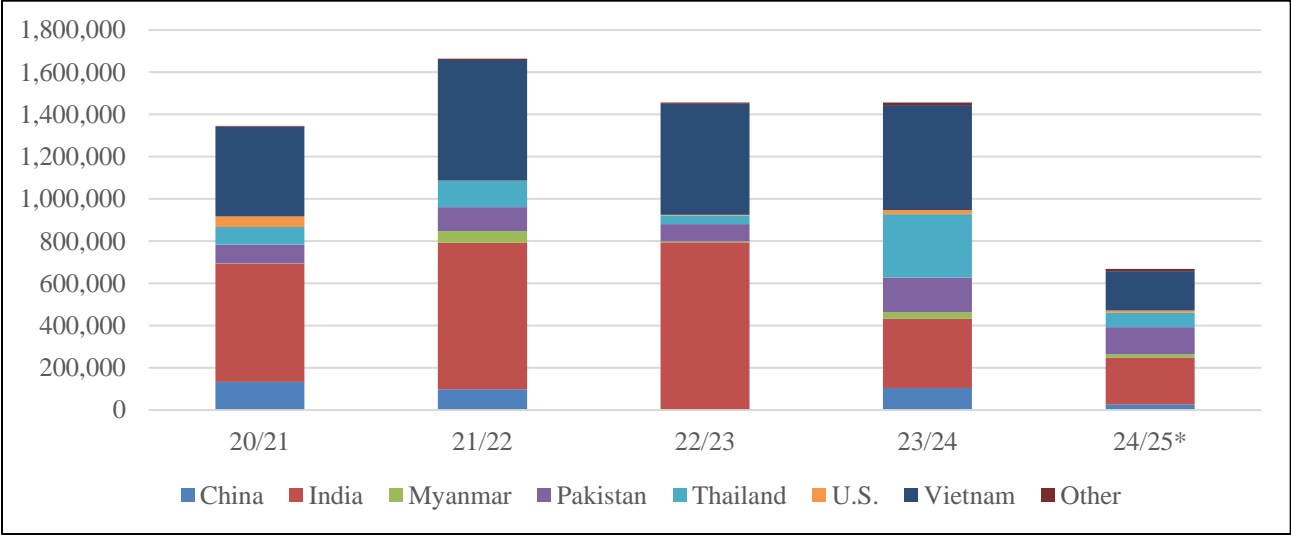
⁵ Côte d'Ivoire's population, at 29.9 million (Central Intelligence Agency, 2024 estimate) is likely to continue growing for the foreseeable future since about 60 percent of the populace is under 25-years of age (as of 2020); the total fertility rate is holding steady at 3.5 children per woman, and contraceptive use is less than 30 percent. See, U.S. Department of Agriculture/Foreign Agricultural Service Abidjan, Accra, “GAIN-CÔTE D'IVOIRE | IV2025-0005 | Côte d'Ivoire, Food Processing Ingredients Annual – 2025,” located at: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Food%20Processing%20Ingredients%20Annual_Accra_Cote%20d%27Ivoire_IV2025-0005.

percent, reaching 4,544 MT; exports to Togo are coming in at 620 MT and to Niger holding at 131 MT. However, exports to several of the other regional markets declined sharply. Shipments bound to Mali plummeted from 1,919 MT to zero. Similarly, consignments to Liberia zeroed out from an earlier 2,835 MT. Rice exports to Ghana also fell by 20 percent. The fluctuation in trade is attributable to a tumultuous cocktail mix of changing regional demand, disruptive trade regulations, and policy shifts.

Over the past five years, Ivorian rice exports have grown at an average rate of 23 percent annually. Nevertheless, volatility in the Malian, Liberian, and Ghanaian export markets, handicaps the relevance of the Ivorian rice export sector. Côte d’Ivoire’s primary focus remains fixated on meeting growing domestic rice demand to ensure its food security. Future export performance will depend largely on surplus production, price control policies, and regional trade agreements. While rice exports help to strengthen regional trade relations (especially within ECOWAS), ensuring food security and price stability within the domestic market remains the Ivorian government’s top priority.⁶

U.S. rice shares a strong reputation with Ivorian importers and consumers, who associate it with high quality, cleanliness, and consistency. Many recall the 2000s, when American rice was more accessible, notably through commercial imports and food aid programs. The recent uptick in imports signals the potential for re-engagement with the Ivorian market and reflects renewed premium segment interest.

Chart 1: Côte d’Ivoire, Major Rice Suppliers, Market Year (MY) 2020/2021 to 2024/2025* (MT)



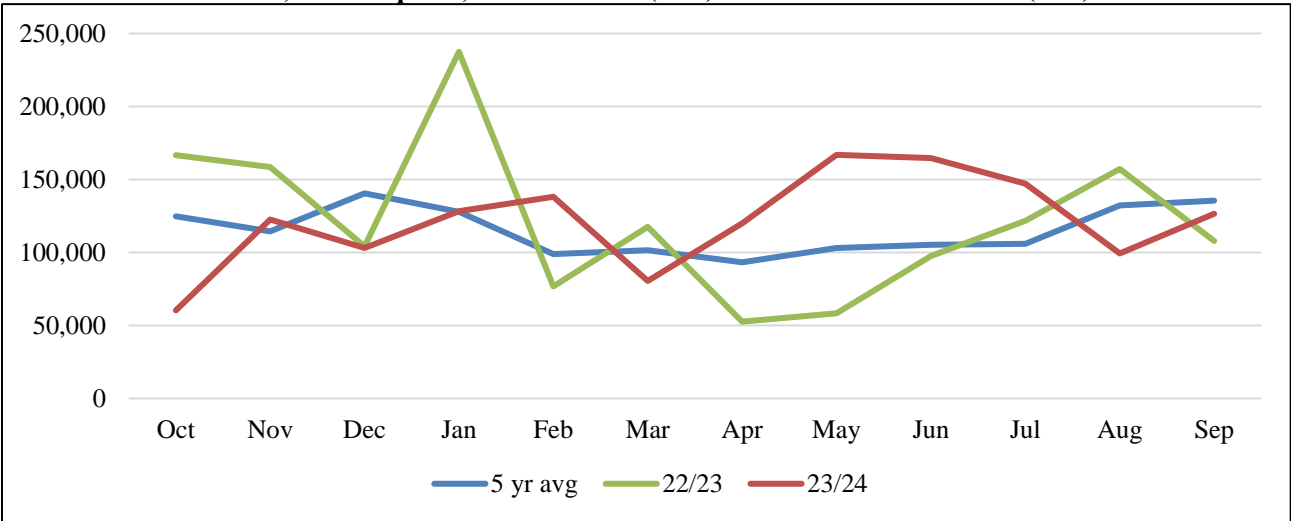
Note: (*) MY 2024/2025 estimate, year-to-date (October-January).
Source: Trade Data Monitor (TDM); FAS Abidjan, Accra office research.

⁶ The Economic Community of West African States (ECOWAS) is a regional political and economic union currently comprised of twelve countries in the West Africa region. The present, and the former member states comprise an area of 5,114,162 km² and have an estimated population of over 424.3 million people. Burkina Faso, Mali, and Niger, three junta-led West African states within the Sahel region, have exited ECOWAS. These by forming the Alliance of Sahel States (*Alliance des États du Sahel* - AES), are weakening ECOWAS. The ECOWAS bloc seeks to enhance regional stability and shared economic growth derived through security cooperation and expanded intraregional trade. The Sahelian states withdrawal carries economic and trade implications for the Coastal West African states. The impact includes the potential disruption to established trade routes and economic zones. Port cities, such as Lomé (Togo), Tema (Ghana), and Abidjan and San Pédro (Côte d’Ivoire) are some that benefit from the transit/transshipment trade. U.S.-origin food and agricultural product export shipments to the Coastal West African states go through these ports.

Imports: FAS Abidjan, Accra forecasts Côte d’Ivoire’s MY 2025/2026 rice imports at 1.6 MMT, down three percent from the MY 2024/2025 estimate of 1.65 MMT. Post foresees Côte d’Ivoire’s rice imports dropping slightly due to growing domestic production combined with local milling upgrades. This might, however, herald a trend for lower imports over time.

In MY 2024/2025, trade data reveal significant shifts in import patterns. Between October and January, rice imports from India surged by 349 percent, reaching 219,317 MT. Similarly, imports from Myanmar increased by 460 percent to 17,549 MT; Pakistan rose by 296 percent to 128,213 MT; and Thailand increased 61 percent to 68,533 MT. At the same time, Vietnam’s exports to Côte d’Ivoire fell by 16 percent to 186,523 MT, while those from China’s stumbled by 55 percent. Côte d’Ivoire is seeking to diversify supply sources in pursuit of greater supply stability amid global market uncertainties.

Chart 2: Côte d’Ivoire, Rice Imports, Market Year (MY) 2022/2023 50 2024/2025 (MT)



Source: Trade Data Monitor (TDM); FAS Abidjan, Accra office research.

Rice Imports, Côte d’Ivoire is a U.S. Rice Export Growth Market: Côte d’Ivoire is a viable destination for U.S.-origin rice. In MY 2024/2025 (October-January), Post is registering Ivorian imports of American rice rising to over 10,312 MT, up significantly from just 1 MT during the same period in MY 2023/2024. Notwithstanding, price competition from Asian suppliers, U.S.-origin rice is held in high esteem for its quality, cleanliness, and consistency.

Table 2: Côte d'Ivoire, Rice Tariff Table

Heading	T.S.N.	Commodity Description	Standard Unit of Quantity	RATES					
				IMPORT					Export Duty
				Import Duty	VAT		Import Excise		
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)
10.06		Rice.							
		-Rice in the husk (paddy or rough):							
	1006.10.10.00	-Seed	kg	5%	0%				0%
	1006.10.90.00	-Other	kg	5%	0%				0%
	1006.20.00.00	-Husked (brown) rice -Semi-milled or wholly milled rice, whether or not polished or glazed:	kg	10%	18%				0%
	1006.30.10.00	-In packings of more than 5 kg or in bulk	kg	10%	18%				0%
	1006.30.90.00	-In packings of 5 kg or less	kg	10%	18%				0%
	1006.40.00.00	-Broken rice	kg	10%	18%				0%

Source: ECOWAS CET; FAS Abidjan, Accra office research.

FAS Abidjan, Accra for rice imports, is not identifying applicable Tariff Rate Quotas (TRQs), nor preferential agreements. In addition to import duty, there are other levies and charges/fees, which include the following:

- Value-Added Tax (VAT) 18.0 percent
- Statistical Fee 1.0 percent
- African Union Levy 0.2 percent
- ECOWAS Levy 0.5 percent
- WAEMU Levy 0.8 percent
- Processing fee 1.0 percent

STOCKS

FAS Abidjan, Accra foresees Côte d'Ivoire's MY 2025/2026 rice ending stocks at 849,000 MT, up 34 percent compared to Post's MY 2024/2025 estimate of 634,000 MT. The anticipated rise in ending stocks is attributable to higher carryover from previous import volumes and slower-than-expected distribution of locally milled rice.

Appendix I – ECOWAS Tariff Table, HS Chapter 10, Wheat, Corn, and Rice

Tariff Table for Wheat, Corn, and Rice { Culled from **Chapter 10** of the ECOWAS Common External Tariff (CET)¹}

Cereals

Notes.

1. (A) The products specified in the headings of this Chapter are to be classified in those headings only if grains are present, whether or not in the ear or on the stalk.
(B) The Chapter does not cover grains which have been hulled or otherwise worked. However, rice, husked, milled, polished, glazed, parboiled, or broken remains classified in heading 10.06.
2. Headings 10.05 does not cover sweet corn (Chapter 7).

Subheading Note.

1. The term “durum wheat” means wheat of the *Triticum durum* species and the hybrids derived from the inter-specific crossing of *Triticum durum*, which have the same number (28) of as that species.

Heading	T.S.N.	Commodity Description	Standard Unit of Quantity	RATES					
				IMPORT					Export Duty
				Import Duty	VAT		Import Excise		
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)
10.01		Wheat and meslin.							
		-Durum wheat:							
	1001.11.00.00	-Seed	kg	5%	0%				0%
	1001.19.00.00	-Other	kg	5%	15%				0%
		-Other							
	1001.91.00.00	-Seed	kg	5%	0%				0%
	1001.99.00.00	-Other	kg	5%	15%				0%
10.05		Corn.							
	1005.10.00.00	-Seed	kg	5%	0%				0%
	1005.90.00.00	-Other	kg	20%	15%				0%
10.06		Rice.							
		-Rice in the husk (paddy or rough):							
	1006.10.10.00	-Seed	kg	5%	0%				0%
	1006.10.90.00	-Other	kg	5%	15%				0%
	1006.20.00.00	-Husked (brown) rice	kg	20%	15%				0%
		-Semi-milled or wholly milled rice, whether or not polished or glazed:							
	1006.30.10.00	-In packings of more than 5 kg or in bulk	kg	20%	15%				0%
	1006.30.90.00	-In packings of 5 kg or less	kg	20%	15%				0%
	1006.40.00.00	-Broken rice	kg	20%	15%				0%

¹The ECOWAS Tariff and Statistics Nomenclature is a common customs nomenclature based on the harmonized system of description and coding of goods (HS) adopted by the Community. It is a 10-digit Tariff and Statistical Nomenclature defining the list of goods making up the Tariff and Statistics Nomenclature categories of the CET. The tariff is applicable to all non-member states of the ECOWAS.

Appendix II – The ECOWAS Common External Tariff (CET) – 5-Tariff Band Structure

The ECOWAS tariff nomenclature has been migrated from 2007 to the 2012 version (HS 2012) introduced by the World Customs Organization (WCO). On 25th October 2013, ECOWAS Member States adopted the ECOWAS Common External Tariff with the 5-tariff band structure below:

Categories	Percentage of Duties	Goods Description
0	0%	Essential social goods.
1	5%	Goods of primary necessity, raw goods, and Capital Goods.
2	10%	Intermediate goods and inputs
3	20%	Final Consumption goods or finished goods
4	35%	Specific Goods for Economic Development

Cote d'Ivoire began full implementation of the ECOWAS CET in 2015. Follow this link; [ECOWAS Common External Tariff \(CET\) – ECOWAS Trade Information System\(ECOTIS\)](#) for more information on the ECOWAS CET.⁷

Attachments:

No Attachments

⁷ See, ECOWAS Trade Information System (ECOTIS), “ECOWAS Common External Tariff (CET),” located at: https://ecotis.ecowas.int/?page_id=24111.