GABONESE REPUBLIC

COUNTRY SNAPSHOT

Population: 1,705,336
- Urban: 1,487,053 (87%)
- Rural: 218,283 (13%)

Rice Availability: 90
- Urban: unknown
- Rural: unknown

Rice market: White milled rice

Production: USDA, 2016 No data
- FAO, 2011 1,000 MT

Domestic industrial rice milling: Estimated none

Regional trade: Small quantities to São Tomé and Príncipe islands and Morocco

IMPORTS

Number of importers: Unknown, expected consolidated.

Mode of imports:
Unknown proportion of break-bulk, bulk, and containers. Port Gentil is the largest seaport in the country but Port Libreville is also capable of unloading containers.

Total imports: USDA, 2015 No data
- UNC, 2015 68,847
- FAO, 2011 64,000

Type & Origins:
- Brown rice 2 (0%)
- Paddy rice 1 (0%)
- Semi/wholly milled rice: 68,844 (100%)
- Thailand: 68,408 (99.4%)

Sources: ¹CIA Factbook 2015 ²Overall estimate is FAO 2011; Inadequate data to estimate urban/rural availability ³UN Comtrade 2009 ⁴UN Comtrade 2015 exporter reporting
Abbreviations: MT = metric tons, USDA = United States Department of Agriculture, FAO = Food and Agriculture Organization, UNC = UN Comtrade

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Gabon is 88% forested, agricultural production of rice is limited.
**Executive Summary**

Located on the coast in central Africa, Gabon is a highly urbanized country of approximately 1.7 million people. FAO estimates that the most important cereal grains are wheat, rice, and maize, in descending order; availability of each has tripled since 2001. Approximately 55,000 MT of rice is available annually, or 90 grams per capita per day. Production of domestic rice is estimated to provide less than 5% of the rice available in Gabon. Other traditionally grown carbohydrate sources, such as cassava and taro, are still important sources of energy in the diet.

Given adequate consumption levels, low domestic production, and high urbanization, fortification of imported rice is likely to have high potential coverage and public health impact. However, limiting factors include lack of consumption data for better understanding of subgroup coverage, lack of preexisting fortification policies (indicating lack of existing awareness or support for fortification), and unknown regulatory capacity for fortified rice.

Complementary fortification of wheat flour and rice could also be a potential, as wheat flour is available in greater quantities than rice, and 100% of domestic wheat flour is milled industrially.

**Table 1: Demographics and Annual Rice (milled equivalent) availability**

<table>
<thead>
<tr>
<th>Population</th>
<th>Urban</th>
<th>Availability (MMT)</th>
<th>Imports (MMT)</th>
<th>Exports (MMT)</th>
<th>G/c/d</th>
<th>Production (MMT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1,705,336</td>
<td>87%</td>
<td>0.055</td>
<td>0.064</td>
<td>0</td>
<td>90</td>
<td>0.001</td>
</tr>
</tbody>
</table>

2007-2011 trend:
+1.93%/yr | +2.7% | +2.6 | +19% | -- | -- | 0%

**G/C/D:** grams per capita per day; MMT, million metric tons

**Grain Consumption and Fortification Status**

The most important cereal grains in Gabon are wheat and rice (Table 2) and have grown in availability since 2001. However, starchy roots/plants such as cassava and plantains are still important staple crops in Gabon; FAO estimates per capita availability is 460 g/c/d. It is likely these foods are more important in rural areas. The 1994 Household Income Expenditure Survey (HIES) found that the primary staple, bread, represented 8.4% of spending on food, followed by 6.2% on cassava and 5.6% on rice. According to the HIES, the poorest households are those that cannot afford rice; a 25kg bag of rice is supplemented with cassava and taro and expected to last a family of 4-5 one month. Cassava is prepared pounded (fufu) and or as flour in porridge (gari).

**Table 2: Cereal Grain Consumption/Availability and Fortification Status**

<table>
<thead>
<tr>
<th>Cereal grain</th>
<th>FAO 2001 (g/c/d)</th>
<th>FAO 2011 (g/c/d)</th>
<th>Mandatory?</th>
<th>% Industrially milled</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wheat</td>
<td>54</td>
<td>171</td>
<td>No</td>
<td>100%</td>
</tr>
<tr>
<td>Maize</td>
<td>12</td>
<td>45</td>
<td>No</td>
<td>Unknown</td>
</tr>
<tr>
<td>Rice</td>
<td>37</td>
<td>90</td>
<td>No</td>
<td>0%</td>
</tr>
</tbody>
</table>

G/C/D: grams per capita per day

1 FAO Food Balance Sheets
2 FFI Database

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1 Gabon was not visited in person by Key Consulting. All information in this profile is secondary data collected by FFI.
2 Household Income Expenditure Survey 1994
Urban vs. Rural
Gabon is a highly urbanized country, with 87% of the population living in urban centers. Most of the country is uninhabited forest – FAO estimates 80% of the country is forested\(^3\). Gabon’s capital, Libreville, is the largest city with approximately 34% of the nation’s population (578,156)\(^4\). The next largest city is Port Gentil (population 111,655)\(^5\).

The limited information on dietary patterns in Gabon is unclear regarding what proportion of rice is consumed in urban or rural populations.

Rice varieties
The market for imported rice in Gabon is white milled rice\(^6\).

DOMESTIC RICE PRODUCTION
Approximately 2% of total available rice in Gabon is grown domestically (Table 3). Rice historically has been grown primarily in the area around Tchibanga in southwestern Gabon\(^7\). However, according to the Japanese International Cooperation Agency (JICA), the Government of Gabon (GoG) has ambitions to plant at least 5 ha of rice in every province\(^8\).

Table 3: Gabon cereals production - 2011\(^1\)

<table>
<thead>
<tr>
<th>Cereals (MMT)</th>
<th>Maize</th>
<th>Sorghum</th>
<th>Millet</th>
<th>Rice (milled)</th>
<th>Wheat</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>0.001</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

\(^1\) FAO Food Balance Sheets 2011

International development support
Gabon is a member country of the Africa Rice Center\(^9\), which supports agricultural research in rice to improve local production. There is a local office of the Africa Rice Initiative (headquartered in Benin) in Libreville, an organization that promotes scale up of New Rice for Africa (NERICA) rice varieties in the region.

The Korea Africa Food and Agriculture Cooperation Initiative also seeks to improve domestic capacity for the rice industry by increasing practice of mechanized rice equipment and processes\(^10\).

JICA also has been working with the GoG’s efforts to increase farmer capacity to grow rice. GoG has a 3,500 ha rice irrigation project with the African Development Bank and also ordered the Office for Rural Development (ONADER) to plant 5 ha of rice in every province\(^8\).

\(^7\) Britannica. Tchibanga. http://www.britannica.com/place/Tchibanga
IMPORTED RICE INDUSTRY

Table 4: Annual rice import volumes, 2011-2015 (MT)\(^1\)

<table>
<thead>
<tr>
<th></th>
<th>2011</th>
<th>2012*</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0.070</td>
<td>0.333</td>
<td>0.084</td>
<td>0.059</td>
<td>0.068</td>
<td>0.070</td>
</tr>
</tbody>
</table>

\(^1\) UN Comtrade exporter data; *no quantities listed in 2012 for Vietnam and Pakistan origin rice; average estimate does not include 2012.

Rice origins
According to 2009 UN Comtrade data\(^{11}\), 99% of the rice imported to Gabon is milled white rice (as opposed to broken, paddy, or brown rice) solely from Thailand. Four other countries (India, France, Portugal, Turkey) export less than 1% of total rice exports to Gabon.

Mode of imports and storage
Port Gentil, in the second largest city of Gabon, is the country’s main seaport due to its role in the petroleum and timber industries. Port Gentil is a container terminal with 0-24 MT lifts\(^{12}\). Five other smaller ports are in the country, including Port of Libreville at the capital, which has storage capacity of 2,500 twenty-foot equivalent containers (TEU)\(^{13}\), or 60,000 MT of rice\(^{14}\). It is not known whether rice is imported in break-bulk, containers, or bulk.

Rice importers
There is limited information on the rice importing industry in Gabon. Olam, a large rice importer in neighboring countries, is listed on the government’s website under “International Investors in Gabon”\(^{15}\), but rice importing is not listed as one of its activities on the Olam website. Olam has been operating in Gabon since 1999; in addition to its rice importing activities, it also has other industrial and agro-industrial projects, including palm oil, rubber, fertilizer, and port logistic – many as joint ventures with the government\(^{16}\).

GOVERNMENT RICE POLICIES AND PROGRAMS
The government’s policy is to improve domestic rice production to reduce dependence on imports. This policy is extended to other imported foods as well. As such, an average value added tax of 23% is levied on agricultural products\(^{17}\).

RICE MILLING
There is limited information on the local rice milling industry in Gabon. However, since local production is so limited, it is likely that milling is practiced only on a local, village-milling scale.

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\(^{12}\) Port of Port Gentil. https://www.searates.com/port/port_gentil_ga.htm


\(^{14}\) Assuming that one standard 20-foot container holds 24 MT of grain


WHOLESALE AND RETAIL TRADE

Wholesale
There is limited information on the wholesale supply chain for rice.

Retail
There is limited information on rice retailing in Gabon. Rice is most likely sold in traditional marketplaces out of bulk bags. Between 2014 and 2016 average cost of 1kg of imported rice was 1,069.35 francs (~1.79 USD$)\(^{18}\).

REGIONAL TRADE
There is limited information about regional rice trade between Gabon and its neighbors. However, the most recent UN Comtrade for Gabon (2009) indicates that small quantities of rice (9 MT) are exported to São Tomé and Príncipe and Morocco\(^{20}\).

REGULATORY MONITORING
Imports are managed by the ASYCUDA computer system\(^{21}\).

RICE FORTIFICATION – SWOT ANALYSIS

Strengths
- Over 95% of the rice available in Gabon is imported.
- Almost 90% of the population is urbanized, increasing likelihood of easy access to imported rice.
- Rice importers are probably highly consolidated; however this requires confirmation.

Weaknesses
- Quantity of rice imported is low, limiting economies of scale.
- Wheat may be a more appropriate vehicle for fortification, given its higher consumption levels.

Opportunities
- More detailed understanding of the rice importing industry is necessary
- More detailed understanding of wheat and rice consumption patterns in Gabon would help inform which subpopulations each vehicle would impact.

Threats
- Quality of regulatory monitoring of imported foods unknown.

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\(^{18}\) 1 USD = 597 CFA, October 20, 2016. https://www.oanda.com/currency/converter/
\(^{20}\) UN Comtrade 2013, visualized by The Observatory of Economic Complexity and data cleaned by the BACI International Trade Database using BACI’s own methodology of harmonization. http://atlas.media.mit.edu/en/visualize/tree_map/hs92/export/gab/show/1006/2013/