**COUNTRY SNAPSHOT**

**Population**: 1,967,709  
Urban: 1,180,625 (60%)  
Rural: 787,084 (40%)

**Rice Availability**\(^2\) (g/c/d): 186  
Urban: 122-348  
Rural: 197-365

**Rice market**:  
100% broken white rice

**Production**:  
USDA, 2016  
60,000 MT  
FAO, 2011  
34,000 MT

**Domestic industrial rice milling**: None; one never-operated industrial mill exists and has capacity to mill 30-50% of domestic supply

**Regional trade**: An estimated 20-30% of imported rice is unofficially re-exported to Senegal when import duties there rise; UN Comtrade 2014 also reports 394 MT total re-exports to Mali, Guinea, Guinea-Bissau, and Senegal.

**IMPORTS**

**Number of importers**: Unknown, expected to be 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, 2016  
150,000 MT  
UNC, 2014  
139,871 MT  
FAO, 2011  
75,000 MT

**Type & Origins**\(^3\)  
MT (% of imports)  
Rough/paddy rice  
739 (0.5%)  
Semi/wholly milled rice  
2,022 (1.5%)  
Broken rice  
137,110 (98%)  
Switzerland  
1,514 (1.1%)  
Paraguay  
6,145 (4.5%)  
Uruguay  
9,627 (7.0%)  
Brazil  
22,721 (16.6%)  
Pakistan  
27,136 (19.8%)  
Thailand  
31,390 (22.9%)  
India  
36,428 (26.6%)

---

**Sources**:  
1. CIA Factbook 2015  
2. Overall estimate is FAO 2011; Urban/rural availability is FFI estimate assuming the urban population consumes 70% of imported rice and the rural population consumes the remainder as well as 100% of domestic production. The range represents the FAO 2011 estimates (lower bound) and USDA 2016 estimates (upper bound) for rice imports and production  
3. UN Comtrade 2014

**Abbreviations**:  
MT = metric tons, USDA = United States Department of Agriculture, FAO = Food and Agriculture Organization, UNC = UN Comtrade; USA, United States of America.

---

Village rice pounding in Gambia. Photo: Ian Farrell
REPUBLIC OF GAMBIA

EXECUTIVE SUMMARY
The Gambia is a small country surrounded by Senegal to the north, south, and east. Rice is the most important cereal grain in Gambia, with an estimated 186 grams per capita per day average (g/c/d) availability. Average availability could be greater in urban populations compared to rural.

Approximately 20% of available rice in the country is domestically produced, with the remainder imported. An estimated 10-20% of officially imported rice is re-exported to Senegal.

Fortification of domestically grown rice is currently unlikely to be feasible, as nearly all domestic rice is husked at the village level, either mechanically or by hand pounding. There are six small, semi-industrial mills with 15-20 MT/day capacity of paddy rice processing. One modern, government-owned industrial mill was built in 2012, but it has never operated.

Fortification is most likely to be feasible with imported rice. Three importers control around 80% of all rice imports, and imports account for 82% of the domestically available rice.

Table 1: Demographics and annual rice availability (milled equivalent)

<table>
<thead>
<tr>
<th>Population¹</th>
<th>Urban¹</th>
<th>Availability²</th>
<th>Imports (MMT)³</th>
<th>Exports (MMT)³</th>
<th>G/c/d²</th>
<th>Production (MMT)³</th>
</tr>
</thead>
<tbody>
<tr>
<td>1,967,709</td>
<td>60%</td>
<td>0.190</td>
<td>0.155</td>
<td>0</td>
<td>186</td>
<td>0.045</td>
</tr>
</tbody>
</table>

2011-2016 trend¹
+2.2%/year²  +4.3%³  +3.8%³  +4.1%³  --  --  +27%³

G/c/d: grams per capita per day; MMT, million metric tons
1 CIA Factbook
2 FAO Food Balance Sheets, 2011
3 USDA, 2016

GRAIN CONSUMPTION AND FORTIFICATION STATUS
Rice is the most important cereal grain in Gambia. FAO 2011 estimates an average availability of 185 g/c/d of rice¹. However, using USDA 2016 import and domestic production estimates², average availability could be as high as 292 g/c/d. Millet, wheat flour from the only mill, maize, and sorghum (in that order of importance) make up the rest of cereals consumption.

Table 2: Cereal grain consumption/availability and fortification status

<table>
<thead>
<tr>
<th></th>
<th>FAO 2001¹</th>
<th>FAO 2011¹</th>
<th>Mandatory?²</th>
<th>% Industrially milled²</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wheat</td>
<td>57</td>
<td>51</td>
<td>No</td>
<td>100%</td>
</tr>
<tr>
<td>Maize</td>
<td>21</td>
<td>48</td>
<td>No</td>
<td>Unknown</td>
</tr>
<tr>
<td>Rice</td>
<td>138</td>
<td>186</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
3 The one industrial mill in the country has never operated but has the capacity to process 30%-50% of the country’s domestic production (depending on FAO or USDA production estimates)

Urban
Gambia’s population is 60% urban. Banjul and the surrounding area is the only urban conglomeration in the country. Most of the imported rice that is not re-exported to Senegal is consumed by the urban population, which eats little domestically grown rice. According to the top rice importer, rice is the number one food staple, “It is breakfast, lunch and dinner”. If an estimated 70% of imported rice is predominantly consumed by the urban populace, urban rice consumption could be 122-348 g/c/d (depending on whether FAO or USDA data is used). Most of the balance of carbohydrates in the urban diet is likely wheat flour.

Rural
Rural households engaged in subsistence agriculture produce and could consume five times as much millet, sorghum and maize combined as rice that they have grown themselves. For some rural households that grow bananas, peanuts, and cashews as a cash crops, imported rice may be consumed. If the rural population consumes the remaining 30% of the imported rice and the entirety of the domestically produced rice, then consumption could be 197-365 g/c/d (depending on whether FAO or USDA data is used).

Rice varieties and quality
Given its geography, it is not surprising that urban Gambian consumers have the same rice preferences as in Senegal for 100% broken white rice. This is lower in price than other rice varieties and also is suited for traditional dishes in both countries. Anecdotally Gambians also prefer rice with good absorption capacity, so it swells up when cooked and appears to be greater volume. Because 100% broken rice has larger surface area in relation to weight, it absorbs more water and swells up more in cooking.

The National Agricultural Research Institute (NARI) is developing and introducing new improved varieties of Nerica rice tolerant to salinity to improve yields and reduce the country’s dependence on imported rice.

DOMESTIC RICE PRODUCTION
Millet is the most important domestically grown cereal grain. It is grown principally by subsistence farmers.

Table 3: Gambia cereals production - 2016

<table>
<thead>
<tr>
<th>Cereals (MMT)</th>
<th>Maize</th>
<th>Sorghum</th>
<th>Millet</th>
<th>Rice (milled)</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0.035</td>
<td>0.030</td>
<td>0.100</td>
<td>0.060</td>
<td>0.225</td>
</tr>
</tbody>
</table>

¹ USDA 2016 via IndexMundi

Production, area and yields
Rice production has been somewhat flat in recent years, with only the recent 2016 crop coming close to approaching the record from of 66,000 MT in 2010 (Table 4). Farmers have little incentive to invest in rice production given stiff competition with low cost imports of 100% broken rice.

Table 4: Gambia rice production, 2011-2016 (MMT)

<table>
<thead>
<tr>
<th></th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2015</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0.033</td>
<td>0.035</td>
<td>0.046</td>
<td>0.031</td>
<td>0.045</td>
<td>0.060</td>
<td>0.043</td>
</tr>
</tbody>
</table>

¹ USDA, 2016 via IndexMundi
With yields of about 0.5 MT per ha in 2015, unit production costs are extremely high. By comparison, the irrigated zone in northern Senegal has achieved yields of 4 to 5 MT per ha.

*Urban distribution*

The major importers have long-established direct relationships (often times based on trade credits) with large shopkeepers and wholesalers for distribution of imported rice. There is little or no commercialization of domestic rice due to high cost, poor quality, and inadequate supply.

*International support*

NARI has received support from AfricaRice and other international bodies to develop and introduce new improved Nerica varieties. So far the impact of these efforts has been very limited.

**IMPORTED RICE INDUSTRY**

Rice is Gambia’s most important imported food commodity. Traditionally 25-30% of imports are re-exported to Senegal. Variations in the level of Gambia’s rice imports are usually a reflection of changes in Senegal’s import duties on rice.

Importers report that the government officially reports annual rice imports of 173,000 MT according to customs data. The USDA’s estimates are net imports, not including rice that is re-exported to Senegal, often illegally.

**Table 5: Annual rice import volumes, 2012-2016 (MMT)**

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rice imports</td>
<td>0.115</td>
<td>0.185</td>
<td>0.14</td>
<td>0.155</td>
<td>0.150</td>
<td>0.149</td>
</tr>
</tbody>
</table>

1 USDA via IndexMundi

**Rice origins**

Local sources reported origin sources of rice are Brazil, Thailand, India and Pakistan; no Vietnamese rice is in the market. This is also supported in UN Comtrade data for 2014, which reports India (26.5%), Thailand (22.9%), Pakistan (19.8%), Brazil (16.6%), Uruguay (7%), and Paraguay (4.5%) as the primary sources for broken rice (98% of imported rice). The specific volumes from each source countries can change constantly depending on the sourcing preferences of the international traders who often finance both ends of the transactions.

Three global rice traders supply the largest rice importers: LD Company, Archer Daniels Midland (ADM) and Ameropa. A small Geneva-based company called Alliance Commodities also supplies rice to the country.

**Mode of imports**

Shyben A. Madi & Sons, the largest rice importer in Gambia, reported that it imports most of its broken rice in bulk vessels and says 60% of the imported rice comes in bulk. Bulk rice vessels arrive with bagging machines on board that are put on the dock in each port.

**Rice importers**

Three trading companies control about 90% of imports: Shyben A. Madi & Sons, George Banna

---

& Co. and Gamfood Trading Co (Table 6). All of these companies have been in Gambia for many years but have Lebanese roots.

Approximately 12% of rice is imported by 10-15 small, mostly Indian trading companies that bring in rice by the container and have steadily increased market share.

Shyben A. Madi & Sons Ltd is the largest rice importer in The Gambia. It was founded in Banjul in the 1890s but began to import rice only in the mid-1980s. Prior to that the government was the sole importer.

Louis Dreyfus (LD) Company is the largest supplier to the importers. Importers call the company “the king of Brazil rice.”

Table 6: Major rice importing companies in Gambia*

<table>
<thead>
<tr>
<th>Company</th>
<th>Headquarters</th>
<th>Import share (MT)</th>
<th>Import share (%)</th>
<th>Notes (suppliers, etc)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shyben A. Madi &amp; Sons Ltd., Banjul</td>
<td>Local</td>
<td>70,000</td>
<td>41%</td>
<td>ADM</td>
</tr>
<tr>
<td>Gamfood Trading Co. Ltd., Banjul</td>
<td>Local</td>
<td>40,000</td>
<td>24%</td>
<td>LD Company</td>
</tr>
<tr>
<td>George Banna &amp; Co. Ltd., Banjul</td>
<td>Local</td>
<td>40,000</td>
<td>24%</td>
<td>Ameropa (not confirmed)</td>
</tr>
<tr>
<td>10 -15 small importers</td>
<td>Local</td>
<td>20,000</td>
<td>11%</td>
<td>Containers only</td>
</tr>
</tbody>
</table>

*Estimates are based on interviews with these companies but revised from company statements to equal level of imports according to USDA data.

Imported rice storage
Importers store their rice in bags in warehouses. The Port of Banjul has capacity to store 7,072 20-foot equivalent containers (TEU)4, or 169,728 MT of rice5.

GOVERNMENT RICE POLICIES AND PROGRAMS
The government has announced there would be a ban on rice imports starting in 2016. But there is little possibility of production rising to make up for the lack of imported rice.

President Yahya Jammeh led a high-profile campaign to increase rice production, and even reach self-sufficiency by 2016. The campaign’s slogan is “Grow what you eat. Eat what you grow.” In mid 2015 he called for a rice imports ban beginning in 20166; in late 2015 the government announced the ban was moved to September 20167.

---

5 Assuming that a standard 20-foot container holds 24 MT of rice
RICE MILLING

Village milling
A large part of the rural population still husks paddy rice by hand pounding, though donor programs have provided some husking mills to villages. Villagers take their paddy rice to these mills for toll milling.

Small enterprise milling
The Gambia has five compact multi-pass mills with capacity of 15 MT per day of paddy rice. Paddy rice is spread on drying platforms. The mills have de-stoners but no color sorting or packaging. Rice sacks are hand-sewn closed. One 20 MT per day mill is in the Central River Region (CRR) near the towns of Kultau and Medina in the CRR region.

Industrial milling
There is no industrial milling of rice, even though one modern mill exists. A Lebanese business group in partnership with the government (50% ownership) built Kamalo Rice Mill in Banjul two years ago but it is still only 95% completed and never operated due to a dispute. The rice mill has a multi-pass line and equipment supplied by Schule in Germany. If the mill were to operate it would have capacity to mill 30%-50% of the domestic supply of milled rice.

The enterprise also included a feed mill that operated for a year (2012-2013) but failed.

Table 7: Industrial rice millers in Gambia¹

<table>
<thead>
<tr>
<th>Company</th>
<th>Mill location</th>
<th>Capacity (paddy)</th>
<th>Farm</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kamalo Rice Mill</td>
<td>Disputed between private group and government</td>
<td>30,000 MT/yr</td>
<td>No</td>
<td>Never operated</td>
</tr>
</tbody>
</table>

¹ Industry interviews

Domestic rice storage
The unused Kamalo mill has a tower dryer and four steel silos with storage capacity for 1,000 MT paddy. Domestic rice is primarily stored at the household level.

WHOLESALE AND RETAIL TRADE

Wholesale
Most trade is conducted directly by importers with large shopkeepers, with the importers often providing trade credit. Most rice wholesalers and retail sellers are Mauritanians who have a large diaspora throughout West Africa.

Retail
Most households buy 50 kg bags of 100% broken rice to keep per kg costs down. A typical urban family of six to eight people may purchase one or two bags per month.

WORLD FOOD PROGRAMME
School feeding is the main activity of WFP Gambia. The main food commodities procured are imported rice, local beans and vegetable oil. Rice is mostly purchased from Senegal through WFP’s blanket, regional optional arrangement with LD Company. WFP did a market study early
in the summer of 2016 to buy some imported rice locally. They maintain a list of rice importers in Gambia.

**REGIONAL TRADE**
When Senegal maintained much higher import duties on rice than Gambia, up to 30% of the rice imported to Gambia was re-exported to Senegal in illegal cross-border trade. Senegal has now reduced its import tariffs on rice, and the cross-border trade has declined. The southwestern Casemence region of Senegal still depends on rice imported via Gambia. For this region, the port of Banjul is much closer than Dakar and more efficient with lower port fees.

**REGULATORY MONITORING**
The Food Safety and Quality Authority is the government body responsible for enforcing national standards.

The National Nutrition Agency (NaNA) conducts household nutrition surveys and advocates for public health interventions to reduce micronutrient deficiencies.

**RICE FORTIFICATION – SWOT ANALYSIS**

**Strengths**
- For urban Gambians, who are estimated to consume up to 400 g/c/d of exclusively imported rice, this is a viable vehicle for fortification.
- Imported rice is almost 70% of rice consumption in cities.
- The rice importing industry appears to be consolidated; just three companies account for 75% of rice imports.

**Weaknesses**
- Fortification of rice is unlikely to reach much of the poor, rural population that consumes hand-pounded subsistence rice, or greater quantities of other cereal grains or starches.
- Rice importers are operating under an anti-rice import government policy that is calling for imminent bans on rice. This will likely make rice importers hesitate to undertake anything new.
- Wheat flour fortification in The Gambia is voluntary; the government has limited experience or awareness of fortification programs.

**Opportunities**
- The government is very keen to restart its modern mill in order to promote more consumption of domestic rice.

**Threat**
- Intense price competition among rice importers and thin margins will undermine any willingness to cooperate.
- Government may not be willing to promote imported rice in any way.
Appendix 1. RICE INDUSTRY CONTACTS

GAMBIA RICE CONTACTS

Company
Shyben A. Madi & Sons Ltd.
6 Ecowas Avenue
P.O. Box 184
Banjul, The Gambia
Tel +220 4226666 or +220 4228303
www.sam.gm
Date of meeting: Oct. 3, 2015
George Madi, Chairman / Managing Director
georgemadi1@yahoo.com
Mobile: +220 7754400

Company
George Banna & Co. Ltd.
5, Liberation Avenue
P.O. Box 143
Banjul, The Gambia
Office +220 4228429 or +220 4228810
Geobanna2@gamtel.gm
Dates of meeting: Thursday, Oct 1, 2015
Antoine “Tony” Banna, owner

Company
Kamalo Rice and Feed Mill
Kamalo - Banjul
The Gambia
Date of visit: Thursday, Oct. 1, 2015
John Komladzei, Project and plant manager
Mobile +220 7873968
komladzei@yahoo.com

Organization
World Food Programme
5, Kofi Annan Street
P.O. Box 553
Banju, The Gambia
Office +220 449 47 82
Date of meeting: Friday, October 2, 2015
Oumie Kulsum Faye, procurement – goods and services
Mobile +220 9713308
oumie.faye-nyang@wfp.org

Mrs. Bintou Sumareh, Procurement assistant – food
Mobile +220 4390535 or +220 90224364 or +220 7210109
bintou.sumareh@wfp.org

Organization
UNICEF
UN Building
Banjul, The Gambia
Date of meeting: Friday, October 2, 2015
Stanley Baker Mwase, UNICEF nutrition consultant
Mobile +220 3360077
modoucheyassinphall@yahoo.com
see this link:
http://allafrica.com/stories/201602091721.html
(not contacted)