COUNTRY SNAPSHOT

Population: 25,900,000
  Urban: 13,986,000 (54%)
  Rural: 11,914,000 (46%)

Rice Availability (g/c/d): 94
  Urban: 104
  Rural: 81

Rice market: 28% white rice, 72% broken white rice

Production: USDA, 2016 300,000 MT
            FAO, 2011 309,000 MT

Domestic industrial rice milling: Existing mills have capacity to mill 12%-22% domestic production; new mill under construction could add 30% to that estimate.

Regional trade: Imported food is transited from Ghana’s ports to its landlocked neighbors, Burkina Faso and Niger. An estimated 100,000 MT of rice is illegally imported through land borders from Cote d’Ivoire into Ghana to avoid Ghana’s higher import duty on rice.

IMPORTS

Number of importers: Four major rice importers with 75% of combined market share. An unknown number of smaller importers with comprising the remainder.

Mode of imports: Majority break-bulk

Total imports:
  USDA, 2016 300,000 MT
  UNC, 2013 644,334
  FAO, 2011 324,000

Type & Origins

<table>
<thead>
<tr>
<th>Type</th>
<th>MT (% of imports)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rough/paddy rice</td>
<td>12 (0%)</td>
</tr>
<tr>
<td>Broken rice</td>
<td>464,844 (72.1%)</td>
</tr>
<tr>
<td>Viet Nam</td>
<td>334,255 (71.9%)</td>
</tr>
<tr>
<td>USA</td>
<td>83,669 (18%)</td>
</tr>
<tr>
<td>Thailand</td>
<td>22,605 (4.9%)</td>
</tr>
<tr>
<td>India</td>
<td>10,409 (2.2%)</td>
</tr>
<tr>
<td>Pakistan</td>
<td>8,071 (1.7%)</td>
</tr>
<tr>
<td>Semi/wholly milled rice</td>
<td>179,455 (27.9%)</td>
</tr>
<tr>
<td>Thailand</td>
<td>104,025 (1.1%)</td>
</tr>
<tr>
<td>India</td>
<td>51,653 (4.5%)</td>
</tr>
<tr>
<td>USA</td>
<td>22,551 (7.0%)</td>
</tr>
</tbody>
</table>

REPUBLIC OF GHANA

Population: 25,900,000
  Urban: 13,986,000 (54%)
  Rural: 11,914,000 (46%)

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Regional trade: Imported food is transited from Ghana’s ports to its landlocked neighbors, Burkina Faso and Niger. An estimated 100,000 MT of rice is illegally imported through land borders from Cote d’Ivoire into Ghana to avoid Ghana’s higher import duty on rice.

Sources: 1CIA Factbook 2015 2Overall estimate is FAO 2011; Urban/rural availability is FFI estimate assuming the urban population consumes 80% of imported rice and the rural population consumes the remainder as well as 100% of domestic production. 3USDA 2016 4UNComtrade 2013; Abbreviations: MT = metric tons, USDA = United States Department of Agriculture, FAO = Food and Agriculture Organization, UNC = UN Comtrade; USA, United States of America.
REPUBLIC OF GHANA

EXECUTIVE SUMMARY
Rice is a significant cereal grain in the diet of the urban Ghanaian population, at 90 grams per capita per day average availability according to FAO 2011. For rural populations, maize is considered a more important cereal grain because it is widely grown and consumed. On average however, rice availability is only about two-thirds that of wheat flour. Wheat flour average availability is roughly half that of rice, but likely greater in the urban population. Fortification of wheat flour is mandatory, and 100% of domestic wheat flour is industrially milled.

Rice imports and domestic production have been stable in recent years.

The 40% devaluation of the Ghanaian currency (cedi, GH¢) in 2013-14 has helped make domestic rice production more competitive against rice imports. The importing industry is somewhat consolidated, with four or five rice importers controlling about two thirds of total imports.

Domestic milling capacity of rice is greater than in its neighboring countries, with a local agribusiness group building one of the largest integrated rice mills (500 MT of paddy/day) in Africa. However, industrial milling of domestically grown rice is still only estimated 22% or less of total milling; planned investments in milling capacity indicate future potential to mill 50% of the domestic production.

Fortification of rice is most feasible with imported rice and thus most likely to provide public health benefits to the urban population.

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

<table>
<thead>
<tr>
<th>Population¹</th>
<th>Urban¹</th>
<th>Availability²</th>
<th>Imports³</th>
<th>Exports³</th>
<th>G/c/d³</th>
<th>Production³</th>
</tr>
</thead>
<tbody>
<tr>
<td>26.3 million</td>
<td>54%</td>
<td>0.849</td>
<td>0.600</td>
<td>0</td>
<td>94</td>
<td>0.300</td>
</tr>
</tbody>
</table>

2011-2016 trend

+2.2%/yr¹ | +3.4%/¹ | +0.9%/³ | +0.5%/³ | -- | -- | +2.0%/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
As it is grown widely across the country and eaten predominantly by the rural population, maize is considered the main cereal staple despite lower average per capita consumption compared to rice (Table 2). Other staples such as cassava, yams, and plantains are still a predominant source of starch in the diet. It is likely that maize and these starchy tubers/fruits are consumed primarily by the rural population for dishes such as fufu (pounded cassava, yams, and plantains) and kenkey (fermented cornmeal dumplings).

The average per capita wheat flour consumption is relatively low compared to either rice or maize, but this is likely higher if considering that it is likely only the urban population that consumes wheat flour (est. 100 g/c/d).
Table 2: Cereal grain consumption/availability and fortification status

<table>
<thead>
<tr>
<th></th>
<th>FAO 2001(^1) g/c/d</th>
<th>FAO 2011(^1) g/c/d</th>
<th>Mandatory?(^2)</th>
<th>% Industrially milled(^2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wheat</td>
<td>35</td>
<td>54</td>
<td>Yes</td>
<td>100%</td>
</tr>
<tr>
<td>Maize</td>
<td>48</td>
<td>70</td>
<td>No</td>
<td>Unknown</td>
</tr>
<tr>
<td>Rice</td>
<td>63</td>
<td>94</td>
<td>No</td>
<td>&lt;22%</td>
</tr>
</tbody>
</table>

G/c/d: grams per capita per day
\(^1\) FAO Food Balance Sheets
\(^2\) FFI Database

**Urban**

Ghana’s population is 54% urban. Although there are no consumption surveys available to confirm, it can be assumed that the urban population consumes more rice and wheat flour and less maize meal and starchy staple crops (e.g. cassava and plantains) than rural dwellers. If we assume that city dwellers consume 80% of the imported rice and only 20% of domestic rice\(^1\),\(^2\), per capita urban rice consumption comes to an estimated 104 grams per day. USDA reports that local rice is rarely found in the marketplace in urban areas.

**Rural**

Both domestic and imported rice is consumed in the countryside – imported rice is eaten particularly in the south where little rice is grown; however, quantities are still lower as the main food is *fufu*. Throughout the country a large number of farm households grow cash crops like cashews, cocoa and coffee but buy rice and other imported foods. Assuming the rural population consumes 80% of the domestically grown rice and 20% of imported rice, then average per capita consumption could be 81 g/c/d. A 2008 study found that in the rural Eastern Region of Ghana, 96.8% of respondents consumed maize every day, compared to only 28.8% for rice (the majority, 65.6%, reported consuming rice on a weekly basis)\(^3\). Bread was also consumed daily in 62% of the respondents, indicating that wheat flour may have deeper penetration in some rural areas than assumed.

In the north, the domestic crop is parboiled, as in Nigeria. The British introduced the practice of parboiling of rice to many of its former colonies, particularly India, as an intervention to reduce the incidence of beriberi (caused by vitamin B1, or thiamin, deficiency)\(^4\).

**Rice varieties and quality**

Even though most domestic rice (mainly self-consumed by farmers) is parboiled, almost all imported rice is not parboiled. Urban Ghanaians prefer imported long-grain, fragrant (“perfumed”) white rice from Thailand and Vietnam, mostly with 5% broken rice but some with 30% broken. The fragrant rice segment now accounts for 80% of imports\(^1\). The 5% broken

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\(^2\) 80% of imported rice consumed by the urban population is a conservative estimate. USDA 2014 also cites a report that suggests 76% of rice in the country (0.64 MMT) is consumed by the urban population. If this is the case, imported rice may be 100% consumed by the urban populace.
Fragrant rice is the most price-competitive category. About 10% of the market is 100% broken rice, used in traditional dishes that specifically use broken rice, such as "jollof" rice. Only 1% of the Ghana import market is parboiled. Anecdotally, the Moslem community (17% of population) prefers parboiled rice, as it is thought to go well with meat sauces.

According to 2013 UN Comtrade data, 28% of the imported rice was semi/wholly milled (whole kernel) rice, versus 72% broken (white) rice.\(^5\)

**DOMESTIC RICE PRODUCTION**

**Table 3: Ghana cereals production - 2016\(^1\)**

<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>1.8</td>
<td>0.30</td>
<td>0.18</td>
<td>0.30</td>
<td></td>
<td>2.58</td>
</tr>
</tbody>
</table>

\(^1\)USDA, 2016 via IndexMundi

**Table 4: Ghana rice production, 2012-2016 (MMT)\(^1\)**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>0.289</td>
<td>0.342</td>
<td>0.362</td>
<td>0.33</td>
<td>0.30</td>
<td>0.31</td>
</tr>
</tbody>
</table>

\(^1\)USDA, 2016 via IndexMundi

**Production, area and yields**

Milled rice constitutes only about 12% of total cereal production, about the same level as sorghum and millet. Maize is by far the main cereal crop, with 70% of the total 2015 harvest for grains.

Rice has been slow to take off as a cash crop. The 2015 harvest of 300,000 MT milled rice equivalent was 5% below the five-year average harvest. USDA reports that of about six varieties grown in Ghana, a perfumed variety called Jasmine 85 is the most common. Most rice is grown by smallholders and yields are low (average 2.6 MT per ha) given infrequent use of fertilizer.

Many farmers prefer to grow cashews, cocoa and coffee as export cash crops and use their earnings to buy imported rice.

**Urban distribution**

Although there is limited urban availability of domestically produced rice, one rice importer has been active in urban distribution of domestically grown and milled rice. CCTC, a subsidiary of the leading food group, Finatrade, launched an initiative in 2001 to begin including domestically produced rice in its urban distribution channels. They have worked with Ghanaian farmers to improve their production capacity and the quality of their paddy. The company has also invested in a small rice mill to market a product to international standards, under its Rice Masters umbrella brand.

**International support**

As a middle-income country with significant revenues from gold, oil, and gas, Ghana has less international donor support than other less-developed African countries. Nevertheless, many

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local and international NGOs have carried out projects to promote greater rice cultivation and gender-based social enterprises. In northern Ghana, WFP works with women parboiling groups to introduce new technologies.

Donors have contributed in the past to the Ghana Rice Inter-Professional Body (GRIB), a 10,000-member association of rice farmers, millers, processors, agrochemical input dealers, and traders. It has organized a National Rice Festival for some years, with the theme “growing a vibrant rice industry through public-private partnership for food security.”

**IMPORTED RICE INDUSTRY**

Rice and wheat are Ghana’s two top imported food commodities. Import volumes for both have been flat over the last five years (Table 5). This is in part due to the sharp devaluation of the Ghanaian cedi from early 2013 into 2014, making imported products more expensive. Importers report that Ghanaians simply increase their consumption of less expensive, domestically produced staples (e.g. maize and cassava) when imported rice prices go up as a result of cedi devaluation or a spike in international prices.

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</td>
<td>0.665</td>
<td>0.53</td>
<td>0.55</td>
<td>0.58</td>
<td>0.6</td>
<td>0.585</td>
</tr>
</tbody>
</table>

*Rice origins*

The most popular rice varieties are Vietnamese and Thai long grain white rice, perfumed with only 5% broken rice. In 2013, Viet Nam was the largest supplier of rice to Ghana – 52% of the market, with Thailand (20%) and the USA (16%) providing the remainder. About 10% of rice comes from India as well. Viet Nam dominates the imported broken rice category, whereas imported white rice with lower quantities of broken rice is predominantly sourced from Thailand and India. The preferred Southeast Asian long grain rice has an average length of 6.8mm; Indian rice averages 6.2 mm in length and Brazilian rice 5.9 mm. Local varieties tend to be shorter.

Since the 40% devaluation of the Ghanaian cedi, Thai rice has become less affordable. Importers report that consumers are now going more for Viet Nam perfumed rice, which is lower cost than even non-perfumed varieties from the United States.

Ghana was previously a large market for US white rice, with market share of 20% in 2010, but down to 16.5% in 2013. As of late 2015, US white rice was about US$ 100 per ton higher than perfumed rice from Vietnam and Ghana was not sourcing perfumed rice from the US.

*Mode of imports*

Most imports are in break-bulk. Stallion Industries, the Ghanaian subsidiary of Stallion Group, the largest rice importer in West Africa, reported that all of its rice imports arrive bagged in break-bulk. US rice, when it was affordable, came in bulk with bagging at the port on arrival. When importing US rice, Stallion relied on port bagging service providers like R&K and Nectar International (UK).

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6 A delegation from the US Rice Federation visited Ghana two years ago. They may be able to share some findings about Ghana’s market
Rice importers

Four importers account for about 75% of all rice imports. In 2015, Taj Investments and Stallion Industries were the two top rice importers in terms of market share; CCTC was the top importer in 2013, with 140,000 MT according to customs data via Stallion. Taj Investments reportedly withdrew from the market for a couple of years due to dispute with the government over non-payment of import duties but re-entered in 2014. Taj Investments is a Lebanese group with major trading interests in several countries of West and Central Africa, DRC and Angola in particular.

Stallion Industries imported 106,000 MT in 2013, 110,000 MT in 2014, and reported expectations of 200,000 MT in 2015. Stallion Group, based in Dubai, has a presence in seven countries, including Benin, Togo and Burkina Faso. Although they do not have a branch in Mali, they also supply rice in Mali through other distributor relationships. In Benin, Cameroon, and Côte d’Ivoire, Stallion Group operates under the name Sonam Africa. In Nigeria, Stallion Group is the largest rice importer and domestic miller, with a market share of over 35%. However, Stallion’s main business in both Ghana and Nigeria is automobile importing.

CCTC’s loss in market share was attributed by competitors due to losses from the cedi devaluation. No data is available on CCTC’s 2015 rice imports. CCTC is part of Ghana’s largest agribusiness company, Finatrade, which is also a major cashew and cocoa exporter.

Olam is another of the top four rice importers in Ghana. It has rice import and distribution operations in Côte d’Ivoire and Nigeria as well. In Nigeria Olam operates a rice mill, a requirement for a company to apply for rice import licenses. Globally Olam is one of the three top three rice traders in Ghana, with average volumes of 1 MMT in the last few years.

The remainder of the rice import market, about one quarter of all rice imports, is handled by a large number of small importers that buy containerized shipments of rice.

The rapid devaluation of the Ghanaian cedi from 2013 to 2014 resulted in millions of dollars of losses for some major importers who were being paid in devalued cedis for rice purchased in US dollars. A few of these have completely withdrawn from the market, such as Rana Motors, another automobile importer. As a result, other local companies are contemplating starting up in rice imports given the room in the market offered by the departure of some players. Rice is one of Ghana’s biggest import commodities and entry into the market requires enough financial strength to buy an entire boatload. When market conditions are favorable, healthy profits can be expected.

Table 6: Major rice importing companies in Ghana

<table>
<thead>
<tr>
<th>Company</th>
<th>Headquarters</th>
<th>Import share (2015)</th>
<th>Local milling capacity?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taj Investments</td>
<td>Pan-African Lebanese group</td>
<td>100,000</td>
<td>No</td>
</tr>
<tr>
<td>Stallion Industries</td>
<td>Stallion Group, Dubai</td>
<td>200,000</td>
<td>No</td>
</tr>
<tr>
<td>Olam Ghana</td>
<td>Singapore</td>
<td>100,000</td>
<td>No</td>
</tr>
<tr>
<td>CCTC Ghana Ltd.</td>
<td>Finatrade Group, Accra</td>
<td>50,000</td>
<td>Small mill (~2MT/hr)</td>
</tr>
<tr>
<td>Small importers</td>
<td>Local</td>
<td>150,000 (containers only)</td>
<td>None</td>
</tr>
</tbody>
</table>

*Author’s estimate based on industry interviews.*
**Imported rice storage**

There is ample warehouse capacity for imported rice at the Port of Tema, 30 km east of Ghana’s capital city of Accra. This includes bonded facilities that permit discharge of vessels without customs clearance and payment of import duties until the goods leave the warehouses. Ports of Tema and Takoradi have warehousing area capacities of 10,000 m² and 7,800 m² respectively.

Tema port has annual volumes of about 11 MMT, 9 MMT of which is imports. Some of the major rice importers are based in Tema. A number of companies have rice warehouses on Spintex Road between Tema and Accra.

Collateral management companies like SGS and DRUM Commodities control some of the rice stored at the port on behalf of banks and large exporters.

**GOVERNMENT RICE POLICIES AND PROGRAMS**

The government has been involved for many years in the development of irrigated land for rice cultivation. The 20% import duty on imported rice affords some protection to domestic producers, but they still struggle to be cost competitive with imported rice, as domestically produced rice is priced similarly to imported 100% broken rice. Additionally, the comparatively high import duty relative to its neighbors has led to reports of smuggled rice from neighboring Côte d’Ivoire, where the import duty is 12.5%.

There is a 20% import duty on rice, which importers generally try to avoid or delay paying, resulting in court cases and occasional shutdowns of a company’s import operations. Beyond the import duty, Ghana’s government is less interventionist in regards to rice policies. Compared to its neighbors in the region, which have higher imports and greater rice demand, the government is less focused on replacing rice imports with domestic production. The devaluation of the Ghanaian cedi due the fall in gold and other commodity prices, has helped keep the lid on imports and served to stimulate investment in domestic production.

**RICE MILLING**

*Village milling*

Small husking mills process almost all of Ghana’s domestic rice now. They husk 1-2 MT/hr, operating 4-8 hours per day for several months after harvest. Subsistence farmers use such small mills to husk their rice, paying in cash or in-kind.

*Small enterprise milling*

None.

*Industrial milling*

There are three existing industrial rice mills (if mills with 2 and 4 MT/hr capacity are considered industrial) and one large mill in planning. Avnash Industries is building a rice mill near Tamale in the north central part of the country, with 500 MT/day paddy rice capacity. Buhler’s plant in Bangalore, India supplied the equipment. It will process paddy procured from the country’s Northern region and Volta region. Paddy rice storage capacity is 3,000 MT.

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The mill will produce parboiled and white rice. According to the managing director, the main challenge will be obtaining supply of enough good quality paddy rice to keep the mill operating.

Collective production of these existing mills could be 34,500-69,000 MT, or ranging from 12%-22% of domestic production (lower range 50% utilization, upper bound 100% utilization). After the Avnash mill is built, running at 100% utilization it is capable of processing an additional 30% of the domestic production.

There are no government milling enterprises, and government in recent times has intervened relatively little in agricultural markets. Government neither buys paddy rice from farmer groups nor rice from millers. This policy is considered positive by international agribusinesses interested in investment in Ghana.

Table 7: Industrial rice millers in Ghana

<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>Avnash Industries</td>
<td>Tamale</td>
<td>500 MT per day (est. 180,000 MT/yr)</td>
<td>Largest mill No farm</td>
<td>Under construction</td>
</tr>
<tr>
<td>Continental Commodity Trading Company (CCTC)</td>
<td>Unknown</td>
<td>2 MT/hr (est.)</td>
<td>N/A</td>
<td>Major importer</td>
</tr>
<tr>
<td>Ghana Ltd.</td>
<td></td>
<td></td>
<td>N/A</td>
<td>Semi-autonomous government-run; mills primarily for institutional purchases</td>
</tr>
<tr>
<td>National Food Buffer Stock Company (NAFCO)</td>
<td>Tamale</td>
<td>4 MT/hr(^2) 2,000 MT silo storage</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>The Prairie Volta Ltd.</td>
<td>Central Tongu, Volta Region</td>
<td>10 MT/hr(^3) 750 ha rice farm</td>
<td>ADB financing at start. Government has 30% share</td>
<td></td>
</tr>
</tbody>
</table>

\(^1\) Industry interviews  
\(^2\) USAID Ghana Value Chain Analysis  

Domestic rice storage
The handful of corporate (owned by registered joint-stock companies) rice farms have grain driers and steel silos for storage of paddy rice. Capacity is just a fraction of the total harvest. Many farmer groups have been given warehouse and drying platforms as part of donor programs.

WHOLESALE AND RETAIL TRADE

Wholesale
A large network of food wholesalers sends trucks to the importers’ port warehouses in Tema to buy rice. Some importers such as Olam have their own distribution networks that include other products, like wheat flour from the company’s mill in Ghana. Rice importers sell to wholesalers and retailers, as well as directly to consumers.
Retail
Retailers buy 50 to 100 bags (25 kg each) of rice at a time from the wholesalers. Only a few retailers potentially have the capital to buy as many as 1,000 bags at a time.

Compared to its neighbors, a higher proportion of rice is sold in smaller 1, 2, and 5 kg bags in supermarkets, under a plethora of brands. All imported rice is sold branded.

Nevertheless a lot of rice is still sold in public markets in low-income districts and small shops where vendors sell by the scoop from bags of branded rice. A high proportion of the poorest population may buy a scoop or two of rice daily or every other day.

The rice market is evolving and maturing, with an increasing number of brands advertised on the television. One umbrella brand of mainly imported rice, Finatrade’s Rice Masters, has even sponsored the national football team.

The retail price of a 50 kg bag of U.S. rice ranges between GH¢ 200 (US$ 67) and GH¢ 215 (US$ 71.67) depending on the grade; Thai rice costs ranges between GH¢ 190 (US$ 63) and GH¢ 220 (US$ 73.33); and Chinese rice between GH¢ 180.00 (US$ 60) and GH¢ 185 (US$ 61.67). Per 1kg, a bag is GH¢ 3.80 (US $1).

WORLD FOOD PROGRAMME
Because Ghana is a politically stable middle-income country, WFP has a relatively low level of operations. The main activity of the country office is logistics support to move food from the Port of Tema to poorer landlocked countries like Burkina Faso, Niger and Chad that are affected by periodic droughts in the Sahel region.

WFP does partially finance the government’s school feeding program but leaves purchasing of food commodities to the dozens of small catering companies contracted to provide the meals.

Rice is a small part of the WFP food basket in Ghana. It makes up 25% of Protracted Relief and Recovery Operations (PRRO) following emergencies, and school feeding.

In 2015, WFP Accra sourced 132 MT of 5% broken rice. Mainly WFP buys rice from the stocks of local importers, such as Olam Ghana.

When WFP purchases rice out of the importers bonded warehouses, normally it is re-bagged into bags with WFP markings, but Ghanaian authorities do not allow re-bagging in customs bonded warehouses. Consequently in Ghana, WFP may forego use of WFP bags under a special exemption.

REGIONAL TRADE
Ghana is a corridor for movement of imported food, including rice and other commodities, from the port of Tema or Takoradi to landlocked Burkina Faso and Niger. Ghana imports little rice from neighboring countries, although there are reports of illegally smuggled rice (as much as 100,000 MT) from Côte d’Ivoire into Ghana, due to the preferential tax structure between the two countries. As a response to the illegal land border imports, the Ministry of Trade and
Industry has lifted a ban on importing rice through land borders, effective as of 1 August, 2016\textsuperscript{8}.

As stated above, there is also regional trade via WFP’s management of rice and other foods traveling to the more drought prone Sahel countries with their highly vulnerable population.

**REGULATORY MONITORING**

The Ghana Food and Drugs Board (FDB) is responsible for inspection of food and other commodities arriving at the port.

**RICE FORTIFICATION – SWOT ANALYSIS**

**Strengths**
- The urban population consumes almost 100% imported rice, 75% of which is brought in by just four companies.
- Two-thirds of imported rice arrives in break-bulk vessels from a limited group of suppliers in Vietnam and Thailand that are the same for all export destinations.
- The government has already implemented mandatory wheat flour fortification.

**Weaknesses**
- The rural population (44% of the population) eats limited or no imported rice. Relative to other starch/carbohydrate foods, rice consumption is low.
- An estimated 30% of domestically grown rice is milled industrially.
- Two thirds of local rice is husked in small village mills where fortification is not feasible.

**Opportunities**
- When the Avnash Group mill is completed, domestically milled rice that enters the marketplace (i.e. not sustenance farming) is likely to be fortifiable through industrial milling.
- Assessment of the wheat flour fortification program would inform the potential of including rice fortification as another vehicle.

**Threats**
- Government may resist any policy that helps market acceptance of imported rice.
- Intense price competition among rice importers and thin margins will undermine any willingness to cooperate.

Appendix 1. RICE INDUSTRY CONTACTS

GHANA RICE CONTACTS

Company
Olam Ghana Ltd.
17 Dadeban Road, North Industrial Area
P.O. GP 1847
Accra, Ghana
Office +233 302 222 300 or +233 302 228 461
Madhur Chopra, Marketing Head – Rice
Mobile+233 244 324 006
madhur.chopra@olamnet.com
Other contact
Pankaj Goyal, Business Head – Rice
Mobile+233 244 325 826
pankaj.goyal@olamnet.com
Mr. Rishi, Rice sales / WFP contact
Mobile +233 544337565

Company
Stallion Industries and Investments Ltd.
59, Graphic Road
P.P. Box No. 3464 Kaneshie
Accra, Ghana
www.stalliongroup.com
Date of meeting: Saturday, November 28, 2015
Raman Mishra, Head of rice
Mobile +233 548 344 071
raman.mishra@stalliongroup.com

Company
CCTC Ghana Ltd.
Dahoma Heights, 21 Spintex Road
PB 30443 KIA
Accra, Ghana
Office +233 242 985051 or +233 302 810161
cctc@finatradegroup.com
www.finatradegroup.com
Anil Nadgouda, Chairman

Company
Taj Investment Ltd.
Tamanya Towers

Port of Tema industrial zone
Tema, Ghana
Office +233 302 258307
Haitham Zabad, Procurement Manager
Talal Bashir, Manager
(no meetings or calls)

Company
Supreme Rice Ltd.
No. 5 Osu Badu Street
Dzorwulu, Accra
Ghana
www.supremericegh.com
Office +233 302 778337 or +233 289 126126
info@supremericegh.com
(no meetings or calls)

Company
Avnash Industries Ghana Limited (AVIL)
32, Dadeban Road, North Industrial Area
Accra, Ghana
Office +233 21 221317
Date of call: Monday, November 30, 2015
Sheva Avnash, general manager, Avnash rice mill
Mobile: +233 540 116922
shevaa@avnash.com

Company
The Prairie Volta Ltd,
Central Tongu, Volta Region
Ghana
Everett Anderson, Director
Richard Amoasi-Andoh, Financial manager
(no meetings or calls)

Organization
Ghana Rice Inter-Professional Body (GRIB)
Near Juvenal Court, Ministries
Accra, Ghana
Office +233 302 689733 or +233 302 674351
grib@4u.com.gh
John K. Imoro Amoro, President
Company
J-Spedi Company Ltd.
1st Floor, 109 Vicsaka House
P.O. Box CO 1485
Tema, Ghana
www.j-spedi.com
Ghana Institute of Freight Forwarders (GIFF)
www.ghanafreightforwarders.org
Joseph Agbaga, 1st Vice President
Date of meeting: October 30, 2015
Joseph Agbaga
Mobile +233 20 811 2077 or +233 24 416 6276
j_spedi@yahoo.com or jagbaga@j-spedi.com.gh

Organization
WFP Accra
No. 7, 7th Rangoon Close, Cantonments, Accra
P. O. Box GP 1423, Accra, Ghana
Office +233-302-785364
**Date of meeting:** Friday, Nov. 27, 2015
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Mobile +233 0244446237
Shehu Abdulkarim, senior project assistant, WFP Tamole suboffice
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sheu.abdulkarim@wfp.org