REPUBLIC OF SIERRA LEONE

COUNTRY SNAPSHOT

Population\(^1\): 5,879,098
   Urban: 2,345,760 (40%)
   Rural: 3,533,338 (60%)

Rice Availability\(^2\) (g/c/d): 269
   Urban: --
   Rural: --


Production: USDA, 2016 693,000 MT
           FAO, 2011  719,000 MT

Domestic industrial rice milling: <7% of total domestic production from 2 operating mills

Regional trade: An estimated 18% of domestically grown rice is traded to Guinea. Lack of duty on imported rice may indicate some unofficial re-exports to neighboring countries.

IMPORTS

Number of importers: One major importer (65% share), three medium-sized importers with 31% collectively and 20-30 small importers with 4% share.

Mode of imports: 90% bulk vessels, remaining in containers

Total imports:
   USDA, 2016  280,000 MT
   UNC, 2015  310,686
   FAO, 2011  176,000

Type & Origins\(^3\)
   \(\text{Rough/paddy rice}\)
   \(\text{Semi/wholly milled rice}\)
   \(\text{India}\)
   \(\text{Pakistan}\)
   \(\text{Broken rice}\)
   \(\text{Uruguay}\)
   \(\text{Brazil}\)
   \(\text{Pakistan}\)
   \(\text{Thailand}\)
   \(\text{India}\)

MT (% of imports)
   1,024 (0.3%)
   54,281 (17.5%)
   29,708 (39.8%)
   21,587 (5.5%)
   255,380 (82.2%)
   76,871 (30.1%)
   74,528 (29.2%)
   47,242 (18.5%)
   38,829 (15.2%)
   14,859 (5.8%)

Sources: ‘CIA Factbook 2015; ‘Overall estimate is FAO 2011, not enough data to estimate urban/rural availability; ‘UN Comtrade 2015 exporter reporting

Abbreviations: g/c/d = grams per capita per day; MT = metric ton; USDA = United States Department of Agriculture; UNC = UN Comtrade; FAO = Food and Agriculture Organization
Rice at 269 grams daily per capita is the most important source of carbohydrates in the Sierra Leonean diet. Rice imports and domestic production have been stable despite the Ebola crisis. Almost all domestically grown rice is husked at the village level; the two recently built industrial mills are estimated could maximally mill 7% of the domestic production (two government mills are not operating).

Two importers control around 80% of rice imports, which are primarily consumed by the urban population. During the lean months after the last crop has been consumed and before a new crop is ready to harvest, imported rice is consumed in rural areas. Similarly, domestic rice is consumed in cities for three to four months until the commercial surplus is exhausted.

Given the limited capacity of the domestic milling industry, fortification of imported rice would be the most feasible option, benefiting the urban population. As wheat flour is mandatory and all wheat flour is imported, an assessment of import food control system would could also inform efforts to import fortified rice.

Table 1: Demographics and annual rice 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 (MMT)</th>
<th>Production (MMT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.9 million</td>
<td>40%</td>
<td>0.575</td>
<td>0.250</td>
<td>0</td>
<td>269</td>
<td>0.693</td>
</tr>
</tbody>
</table>

2011-2016 trend

+2.3% per/yr | +2.7% | +1.0% | +3.4% | -- | -- | +0.9%

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

Average per capita daily rice consumption can be estimated at 269 grams, by far the most important cereal grain in Sierra Leone. Intakes of wheat, maize, and rice have all at least doubled since 2001, but wheat and maize continue to make up a small portion of cereals consumed (Table 2). Millet and sorghum have roughly similar availability as maize (Table 3). Availability of starchy tubers is estimated at 347 g/c/d in 2011, double that of 2001 when it was 175 g/c/d. No dietary consumption information describes subnational patterns.

Table 2: Cereal grain consumption/availability and fortification status

<table>
<thead>
<tr>
<th></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>14</td>
<td>33</td>
<td>Yes</td>
<td>100%</td>
</tr>
<tr>
<td>Maize</td>
<td>4</td>
<td>14</td>
<td>No</td>
<td>Unknown</td>
</tr>
<tr>
<td>Rice</td>
<td>93</td>
<td>269</td>
<td>No</td>
<td>&lt;7%</td>
</tr>
</tbody>
</table>

G/c/d: grams per capita per day
1 FAO Food Balance Sheets

Sierra Leone’s population is 40% urban, with close to half in the capital of Freetown (941,000). It is likely that the urban population consumes less rice than rural people and proportionally more wheat-based foods. Total wheat consumption increased 42% in the years from 2011-15 compared to the five years prior, to an average of 47,000 MT per year. All wheat flour is imported. Seaboard closed its only wheat mill in the country in 2014 when import duties on wheat flour were lowered, according to local wheat flour importers.

If the urban population consumes 100% of the imported rice, then g/c/d of imported rice consumption is 257. However, sources in Sierra Leone indicate that the urban population consumes 65% to 70% imported rice, with the remainder being locally produced rice.

Most rural households consume rice they have grown themselves. In the past, imported rice was shipped “up-country” to meet rural demand, which began only three months after the end of harvest. However, thanks to production increases, rural areas are more self-sufficient and the lean period leading up to harvest has shortened. Farmers who grow cash crops like cocoa are more likely to purchase imported rice, though a high percentage of them also plant rice for self-consumption.

If the rural population consumes 100% of domestically grown rice, then g/c/d of rice consumption is 275. Again, this estimate is likely to be lower if urban residents also consume local rice.

As there is no official consumption data to refer to and the projected urban/rural availability estimates are similar to the overall FAO 2011 availability estimates, the FAO 2011 average estimate is used.

Rice varieties and quality
Middle-income people in cities still prefer imported rice to local rice, mainly due to quality. Imports have lower impurities due to optical scanning (sortexing) done in Asian export mills. Imports also have lower moisture content, which provides longer shelf life.

A smaller market of urban consumers prefer to eat fresh local rice when it is available, citing taste and texture preference. People like to cook rice and then consume it the next day. Though local rice is fresher, the moisture content is generally too high from inadequate drying, and this decreases shelf life.

Farmers mainly eat local rice. The rural population parboils rice at the household and village level. Consequently in rural areas there may be some preference for imported parboiled rice when local supplies are exhausted during the lean months.

The market for imported rice has changed a lot in the last few years. The leading rice importer stated that four years ago 25% of the market was 25% broken white rice and 60%-65% of the imported rice was 100% broken, which is primarily used to make a dish called “fenfen”.

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2 Index Mundi. Sierra Leone Demographics Profile 2016. http://www.indexmundi.com/sierra_leone/demographics_profile.html
Currently, the market share for 100% broken rice has increased - white rice with 25% brokens accounts for 10% or less of the market whereas 75% of the market is 100% broken white rice. UN Comtrade indicates that in 2015 82% of rice imported was broken rice

The reductions in imported parboiled rice also indicate increasing rice self-sufficiency in rural areas; four years ago importers estimated that the import share of parboiled rice was 15% compared to 10% in late 2015. A leading importer reported 1,500 MT per month of imported parboiled rice.

**DOMESTIC RICE PRODUCTION**

**Table 3: Sierra Leone 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>2016</td>
<td>0.04</td>
<td>0.03</td>
<td>0.045</td>
<td>0.693</td>
<td>0.808</td>
</tr>
</tbody>
</table>

1 USDA, 2016 / IndexMundi

**Table 4: Sierra Leone rice production, 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 (milled)</td>
<td>0.719</td>
<td>0.791</td>
<td>0.728</td>
<td>0.801</td>
<td>0.693</td>
<td>0.746</td>
</tr>
</tbody>
</table>

1 USDA, 2016 / IndexMundi

**Production, area and yields**

Rice is a subsistence crop grown by a majority of rural households in different growing zones, including highland rain-fed, lowlands, mangrove swamps and plains. Total harvested area was 625,000 ha in 2015 per USDA data. Milled rice makes up 88% of total cereals production.

The rice harvest in 2016 was about 7% below the five-year average. This was probably due to disruptions caused by the Ebola crisis that began in late 2014. Oddly, according to USDA, rice production reached a historical peak in 2015, 801,000 MT, which would have been during the epidemic and recovery period. The average harvest in the period 2011-2015 was 35% higher than in the previous five-year period, 2006-10.

Domestic rice production now almost fully meets demand in rural areas. There are regular weekly markets in small towns where farmers and traders sell surplus domestic rice.

Sierra Leone only utilizes 15% to 20% of it 5.6 million ha of arable land. Milled rice yield per ha was only 1.1 MT per ha in 2015 (very low by international norms), a big increase over 2005 when the yield was less than 700 kg per ha. In addition to generally poor agronomic practices, infertile, underdeveloped soil and insufficient fertilizer application play a role in the low yields. One of the new corporate rice farms is said to have had disappointing yields in its first crops due to poor soil, despite modern farming practices.

**International support**

As mentioned above, the EU provided funding to the government for a project executed by FAO to train rice and cocoa farmers, set up FBOs and create 193 ABCs around the country with small

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husking mills. According to some industry people, most donor funded agricultural projects, such as giving husking mills to villages, have failed. In their perspective, the only chance for success is if projects are done through the private sector and not through the Ministry of Agriculture, as has been common in the past.

The small milling company Mountain Lion Rice (MLR) has received a minority investment from UK’s international development agency DFID to support its procurement of paddy rice from 1,000 smallholder farmers around the northern city of Makeni. The farmer groups are aided by various NGO projects. Twenty parboiling kits have been given to 150 women rice farmers under a country specific project.

**IMPORTED RICE INDUSTRY**

Table 5: Annual rice import volumes, 2012-2016 (MMT)\(^1\)

<table>
<thead>
<tr>
<th>Year</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>0.275</td>
<td>0.280</td>
<td>0.220</td>
<td>0.25</td>
<td>0.28</td>
<td>0.251</td>
</tr>
</tbody>
</table>

\(^1\) USDA, 2016 / IndexMundi

Rice is also by far Sierra Leone’s most important imported food commodity. Wheat flour ranks second by volume but is behind sugar and palm oil in terms of value. Import volumes for both rice and wheat flour in 2015 were both slightly below the 5-year average, probably as a result of the Ebola crisis and the global decline in commodity prices since 2014, which has reduced the purchasing power of Sierra Leonean consumers. Their income depends to a large extent directly or indirectly on extraction industries related to diamond, gold and other mineral exports.

**Rice origins**

There are many origins for 100% broken rice, but Brazil and Uruguay are the main source for the two largest importers. Commodities Trading Corporation (CTC) has sometimes imported from Guatemala, selling a brand called Sunshine rice that is 25% broken kernels. Smaller importers who buy by the container generally get their rice from India.

UN Comtrade 2015 data (by exporter reporting) also indicates that Latin America is a key source of rice, with Uruguay and Brazil combined accounting for almost 50% of the import share. The remainder of the origins are Pakistan (22.2%), India (14.3%), and Thailand (13.5%), and several other countries with proportions under 1%\(^4\).

**Mode of imports**

Around 90% of all rice coming from South America arrives in bulk vessels, with bagging at the port. Vessel size ranges from 8,000-25,000 MT but most are 12,000 MT.

CTC owns four bagging machines, so its does all its own bagging at the port. Four bagging machines are needed per vessel, one per hold. CTC reports its last vessel load was 27,800 MT. Working from 8 am to 6:30 pm they can unload 3,000 MT of rice per day. CTC also bags 1 kg, 2 kg and 5 kg packages of rice.

At the time of this visit, the boatload of rice unloading and being bagged in port was 11,600 MT of 100% broken rice from Brazil. CTC sells its 100% broken rice under the Big Joe brand and its 5% and 25% broken rice under the Bella Luna brand.

Saad Group makes use of the bagging service provider Nectar International, UK, which has its own bagging units in Freetown, as well as at many other ports in Africa and Asia. Nectar recently won a tender to take over the operation of Freetown’s bulk port. CTC still brings in some containers of bagged rice as well.

Based on a discussion with the managing director of Nectar International, it is conceivable that rice fortification could be done while rice is being bagged during ship unloading. Nectar, which designs and builds its own bagging machines, could add feeders for the fortified kernel. The main constraints would be the need to train operators, the number of bagging units, and the importance of not slowing down ship unloading operations.

**Rice Importers**

CTC claims to account for 70% of all rice imports. It has been importing rice to Sierra Leone since 1987. Louis Dreyfus Company (LD Company) is its sole supplier. SGS provides a collateral management arrangement, releasing rice by the truckload from warehouses only after payment by CTC.

The level of rice imports depends on the local harvest. Usually the commercial surplus of domestic rice is only sufficient for three to four months of urban consumption. Generally from September/October to January/February, no local rice is available on the market and rural populations also rely on imported rice.

Saad Group imports 40,000 to 50,000 MT of rice per year, mainly from Uruguay and Brazil. This amounts to three vessels and some containers per year. Ameropa is their supplier. Formerly Saad Group relied on ADM, which is another of the four top global rice traders.

Smaller rice importers are Dubai-based Phoenix and Djoulde Sow. Phoenix’s main business is sugar. Djoulde Sow supplies rice to the government for the army. Lofty is another name cited as an importer that may occasionally manage to bring in a vessel load or a large number of containers at one time. However no information of volumes was given. Now 20 to 30 small players import rice in containers, according to one of the major importers.

Table 6: Major rice importing companies in Sierra Leone

<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>Commodities Trading Corporation - CTC</td>
<td>Freetown</td>
<td>160,000</td>
<td>65%</td>
<td>LD Company with SGS collateral management</td>
</tr>
<tr>
<td>Saad Group</td>
<td>Freetown</td>
<td>40,000</td>
<td>15%</td>
<td>Ameropa</td>
</tr>
<tr>
<td>Phoenix Trading</td>
<td>Dubai</td>
<td>25,000</td>
<td>10%</td>
<td>Parent company</td>
</tr>
<tr>
<td>Djoulde Sow</td>
<td>Local</td>
<td>15,000 (est.)</td>
<td>6%</td>
<td>Sells to government</td>
</tr>
<tr>
<td>Small importers (20-30)</td>
<td>Local</td>
<td>10,0000</td>
<td>4%</td>
<td>All containers</td>
</tr>
</tbody>
</table>

*Estimates are based on interviews with these companies but revised from company statements, which are likely to be higher than actual, to equal level of imports.*
Imported rice storage

Rice is bagged at discharging and stored in 50 kg polypropylene bags both inside the port area and outside in company warehouses. Though importers now sell to wholesalers directly from their port warehouses, Nectar International as the new operator of the bulk port says it will no longer allow this practice. Consequently the importers will have to build or lease additional storage outside the port to move rice as quickly as possible from vessels without intermediary port storage.

CTC and Saad Group already lease much warehouse space from the Sierra Leone Produce Marketing Company (SLPMC). Some of the warehouses are bonded. In the case of CTC, SGS takes control of these warehouses. Saad Group and Ameropa do not make use of a collateral management arrangement like CTC does with LD Company and SGS. The companies providing collateral management services could also play a role in quality monitoring, including even testing for fortification compliance.

CTC’s policy is to keep a six-month stock of rice in its warehouses, based on its own sales, equivalent to 50,000 to 60,000 MT. This proved important during the Ebola crisis when shippers became afraid or unable to send rice vessels to Sierra Leone. At the time of visit CTC had 50,000 MT of rice in its stores.

The parastatal SLPMC uses less than a quarter of the warehouses for its own activity and leases out the rest of the space. Probably at least half is for storage of rice; other imported food commodities use up most of the rest of the space. Five warehouse locations in Freetown have 150,000 ft² (14,000 m²) of warehouse space. Most of the warehouses are 3,060 ft² (284 m²), but warehouses in Freetown are 5,700 ft². In Bo there are 3 warehouses of 15,000 ft². In Kennedy there are four warehouses of 7,500 ft².

GOVERNMENT RICE POLICIES AND PROGRAMS

The Ministry of Agriculture developed a Smallholder Commercialization Programme for guiding investment in agriculture, which resulted in a 5-year program focused on intensification of crop production and less on crop diversification. According to interviews, the government received EU funding that was transferred to FAO to implement the program. The project developed Agricultural Business Centers (ABCs), with the goal to build the capacity of small farmers through “farmer field schools without walls”. The farmers undergo months of training in extension programs. After graduation they are required to join Farmer Based Organizations (FBOs) with 30 farmers each. Groups of FBOs run the ABCs. One component of the project was subsidies on the cost of wheelbarrows, shovels, hoes and other farm implements.

The government has also created a National Sustainable Agriculture Development Plan (2010-2030), which reaffirms that rice is one of the commodities targeted under the commercialization sub-program implemented through Small-Holder Commercialization and Medium and Large Farm Producer Promotion Schemes. The plan calls for promoting commercialization of rice through investments in the rice value chain (e.g. roads, milling, seed varieties) in order to meet

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the remaining self-sufficiency requirements and produce export quantities for the region\(^6\).

The government’s plans for reaching commercialization of rice are detailed in the National Rice Development Strategy 2009\(^7\).

Since CTC and the other two major importers play a critical role in food security, to be granted import permits and hard currency by the government they must sell with thin margins, according to one company manager.

When the current president took office, he lowered the 18%-20% duty on all rice to 5%. In 2008 when imported rice prices spiked to $800 per ton, the government eliminated the 5% import duty on rice entirely.

According to those promoting commercialization of domestic rice, the absence of a duty effectively subsidizes imports and creates a challenge for local production. The lost import duty amounts to $12 million annually and has affected the balance of trade.

Government procures from importers 23,000 to 24,000 MT of rice per year for institutional feeding: army, police and schools. There are 1.5 million children in Sierra Leone. It is not clear what percentage of them benefit from school feeding programs.

**RICE MILLING**

*Village milling*
A large part of the rural population still husks paddy by hand pounding, though donor programs have provided some husking mills to villages. Lack of electricity or fuel often makes these mills useless.

*Small enterprise milling*
Around 2010 FAO procured rice hullers for each of the 193 ABCs supported by EU funding. Reportedly only 30% of these are still operating. Only a handful of the ABCs could be considered viable businesses. The IFAD (International Fund for Agricultural Development, a UN agency based in Rome) project to develop 3,000 ha of lowland swamp for rice production is in the process of supplying 20 husking mills with capacity of 3 to 5 MT per day to farmers associations.

*Industrial milling*
Despite the importance of rice in the agricultural economy, the few semi-industrial rice mills have struggled to remain viable. There is limited modern drying, storage and milling capacity to produce higher quality rice that could replace a greater share of imports for urban consumption. Taken together, the three milling operations described in Table 7 could mill 16% (112,000 MT) of the domestic milled rice production. However, according to sources the government mills are not in operation. Thus the operational mills could mill maximally 7% (52,000 MT) of the total


domestic milled rice production; this is likely less since mills will not be running at 100% utilization.

MLR received funding from UK’s DFID, as well as from private investors, and started up in November 2011. Its Satake mill (2 MT/hr) is located near Makeni, about 200 km north of Freetown. The mill does husking, de-stoning and polishing but has no sorter. Brokens are less than 25%. The mill has a mechanical dryer supplied by Alvin Blair in UK so that the mill can receive rice parboiled by farmers and then dry it. MLR is working with 1,000 smallholder rice farmers to improve their agronomic practices. These farmers are given interest free loans to buy inputs like improved seed, fertilizer and agrochemicals. The mill was likely to receive 1,600 MT of paddy rice from these farmers in the 2015 season, partly in repayment of the input loans. MLR has also started its own 250 ha farm.

Golden Mills Ltd., a Danish investor, operates by far the largest corporate rice farm in Sierra Leone with 1,300 ha near Makeni. At the end of 2015 they completed the installation of a modern rice mill. Golden Mills plans to produce unpolished brown rice, which they say will be healthier in terms of vitamin and mineral content than imported rice. The company has 30 local employees.

None of the main importers have diversified into distributing domestically milled rice. According to Saad Group, this is because of its poor quality, and sourcing from multiple small local millers would require too much supervision.

The government has bought rice mills and tractors from India under a credit facility of the India EximBank. They are large mills with a capacity of 5 to 10 MT per hour. Milling equipment has been delivered to two locations, Makeni in the northwest and Tormabum in the southeast, but neither unit is operating. Both mills still belong to the Ministry of Agriculture, which hopes to sell them to the private sector.

SLPMC is a para-statal enterprise that buys rice from smallholders for milling and local market sales. Its rice is sold under the brand “Sierra Rice.” SLPMC does not own its own mill. SLPMC has purchased paddy rice and delivered to a few of the better-managed ABCs, but their mills have no de-stoning or polishing.

For recent paddy rice purchases SLPMC has contracted with the government seed multiplying enterprise to deliver paddy rice. It has a good mill with adequate cleaning and de-stoning, larger than the ABC mills. The seed multiplication units do not polish rice or remove dark grains via optical scanning. Instead the staff must handpick the dark rice kernels out.

SLPMC was set up to provide a platform to buy coffee, cocoa, palm oil, rice and cashews for domestic sale and export. Formerly it functioned as a “marketing board” controlling supply and prices of commodities, but 20 years ago was converted to a company during a period of market liberalization.

SLPMC’s main activity now appears to be warehouse leasing. Its main asset is a large network of government warehouses from the days when it purchased and stored most agricultural commodities itself.
Table 7: Industrial rice millers in Sierra Leone (partial list)

<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>Mountain Lion Rice (MLR)</td>
<td>Makeni</td>
<td>2 MT per hour</td>
<td>None</td>
<td>DFID UK financing</td>
</tr>
<tr>
<td>Ministry of Agriculture</td>
<td>2 locations: Makeni and Tormabum</td>
<td>2 mills (5-10 MT/hr each)</td>
<td>Imported from India, but not operating. May be privatized.</td>
<td></td>
</tr>
<tr>
<td>Golden Mills Ltd.</td>
<td>Makeni</td>
<td>10 MT per hour (unconfirmed)</td>
<td>1,300 ha farm</td>
<td>Danish investors</td>
</tr>
</tbody>
</table>

Domestic rice storage
Domestic rice is primarily stored at the household level. The network of 193 ABCs has some storage. WFP operates its own storage facilities at sub-offices around the country.

WHOLESALE AND RETAIL TRADE

Wholesale
The large importers have a number of storage hubs around the country. Imported rice is sold to dozens of wholesalers by the truckload. There are clusters of such wholesalers at each public market where retail vendors buy a few bags at a time.

Retail
The lower income population in cities buys most of their food from small vendors in sprawling public markets. Many household buy rice by the cup daily or a few kilos every few days.

As of October 2015 the price of 25% broken white rice was 140,000 to 150,000 leones (USD 25.00-27.00) per 50 kg; 100% broken rice sold for 116,000 leones (USD 20.70) per 50 kg bag.

WORLD FOOD PROGRAMME
Rice is a big part of WFP’s food basket in Sierra Leone. Most rice is procured from importers but WFP has a goal to increase local procurement. The annual requirement is around 7,000 MT. The number of WFP beneficiaries went up sharply during the Ebola crisis thanks to a surge in donor funding but returned to normal levels again as of late 2015.

CTC is an important rice supplier to WFP, which bought 3,000 MT and 4,000 MT in 2014 and 2015 respectively. The last contract with WFP was for an emergency Ebola response purchase.

WFP started buying locally when Purchase for Progress (P4P) was launched in 2009. The target is to buy 10% of WFP’s food distribution requirement from small farmers, but the highest level so far has been only 500 MT, or about 7% of requirement.

MLR had a contract to supply WFP with 300 MT of parboiled rice in April, 150 MT each month in May and June, and 350 MT in August. The company only supplies parboiled rice.

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WFP cooperates with several agencies and NGOs providing logistical support for local rice farming including GIZ (Germany’s international cooperation agency). WFP procurement staff stated that farmers in Sierra Leone are now able to produce clean rice without stones, meeting international standards. WFP has worked with up to 30 FBOs at one time.

WFP is starting a home-grown rice for school feeding program. A Japanese bilateral project started in 2013 to support farmers to increase their yields and improve post harvest handling and storage so the local rice can meet WFP quality requirements.

REGIONAL TRADE
Though the country still imports at least 250,000 MT of rice, some studies have show that 18% of the country’s rice production is exported in cross border trade with Guinea. Given the low import duties on rice in Guinea, some of the rice could be bound for Burkina Faso or Niger.

USDA estimates an average of 72,000 MT of rice exports from Guinea per year during the last five years. This rice could be partly originating in Sierra Leone and pass through Guinea in transit to Niger, Chad or Burkina Faso.

REGULATORY MONITORING
There is little in the way of regulatory monitoring of rice and other imported or domestically grown foods. A fortification law would likely come under the Ministry of Health & Sanitation, with regulations under the Sierra Leone Standards Bureau.

Ministry of Agriculture coordinates the Anchor Borrower Program in conjunction with Central Bank of Sierra Leone. The main partners in the program are large commercial millers.

RICE FORTIFICATION – SWOT ANALYSIS

Strengths
- Rice is the primary cereal grain consumed in Sierra Leone.
- The urban population consumes a high share of imported rice, 80% of which is brought in by just two companies.
- During the lean period, the rural population consumes imported rice.
- Just one importer with a single supplier controls up to 70% of imports.

Weaknesses
- 90% of local rice is hand pounded or husked in small village mills where fortification is not feasible.
- The rural population is unlikely to consume fortifiable rice during most of the year.

Opportunities
- Assessment of the existing wheat flour fortification program (which should be monitored at port of entry) will inform feasibility of fortification of imported rice.

Threat
- Intense price competition among rice importers and thin margins will undermine any willingness to cooperate.
Appendix 1. RICE INDUSTRY CONTACTS

SIERRA LEONE RICE CONTACTS

Company
Saad Group Ltd.
17 Wilberforce Street
PO Box 776
Freetown, Sierra Leone
saad9119@gmail.com

**Date of meeting:** October 20, 2015
Mr. Saad, Chairman
Mobile: +232 76603050
Mr. Hussein, operations (no meeting)
Mobile +232 88137044

Company
Commodities Trading Corporation - CTC
Ludgate House
3 Wallace Johnson Street
Freetown, Liberia
Office +232 22 227 015 or +232 22 228 835

**Date of meeting:** October 20, 2015
Mohamed Ghabras, Operations Manager
Mobile +232 78 785 555
mghabras.ctc@gmail.com or mghabras@ctc.sl

Company
SGS representative
5 Ross Road
Freetown, Sierra Leone

**Date of meeting:** October 20, 2015
Abdoulaye Kebaly Sow, Manager, SGS
Freetown
Mobile +232 30 24 29 11 or +232 88 12 56 55
Alieu Kamara, SGS supervisor (assistant to Abdoulaye)
Mobile +232 76850065 or +232 30 85 00 65

Company
Nectar Group Limited
1 Ashton Gate
Ashton Road, Harold Hill, Romford
Essex RM3 8UF
United Kingdom
www.nectargroup.net
+44 1708 386 555

**Date of meeting:** Oct. 19, 2015
Guy Wilkes, Director
gwilkes@nectar.co.uk
Mobile +44 7739 853 078
Jean-Paul Ellul, Financial Controller
Jean-paul@nectar.co.uk
Mobile +44 7549 300 941

Company
Mountain Lion Rice (MLR)
15 During Street
Makeni, Sierra Leone
info@mlbr.org
Donald Smart, CEO
Mobile +232 76 615 601

Company
Golden Mills Ltd.
65, Siaka Stevens Street
Freetown, Sierra Leone
www.golden-mills.net (not working)

**Date of contact:** Oct. 20, 2015
Fritz Winther, general director
fritz.winther@gmail.com
Mobile+232 300 309 38

Company
Sierra Leone Produce Marketing Company (SLPMC)
17A Off Hill Cot Road
Freetown, Sierra Leone
Office +232 22 315 225 or +232 22 220 098
www.slpmc.sl (not working?)

**Date of meeting:** December 21, 2015
Henry Yamba, Managing Director
+232 78 0610900 or +232 77 061090
hykamara@slpmc.sl
Ahmid Kabba, Director of Operations
(separate discussion after Yamba)
+232 76 314 619 or +232 77 205 540
akabba@slpmc.sl

Organization
Date of meeting: Oct. 21, 2015
Mohamed Tejan-Kella, Programme Coordinator
Mobile: +232 776 615 976
mohamekellla@yahoo.co.uk or mtejan-kella@npeu.org
skype: MTechan-Kella
James K.M. Foh, Senior Procurement / Human Resources Officer (separate)
Mobile +232 76 680 480
jamesfoh@yahoo.co.uk or jfoh@npeu.org

Date of meeting: October 19, 2015
Joseph Brima, Associate FAO Representative, Programmes
Mobile: +232 790 250 150 (official) or +232 124 532 (private)
Joseph.brima@fao.org
Skype: Joseph Brima
Sarah Kia Bowoh Kaikai

Date of meeting: October 19, 2015
Peter Scott-Bowden, Country Director and Representative
Mobile +232 76 100 524
peter.scott-bowden@wfp.org
Aruna S. Bangura, Procurement Associate
or
salking2009@yahoo.com or
lilian.senessie@wfp.org