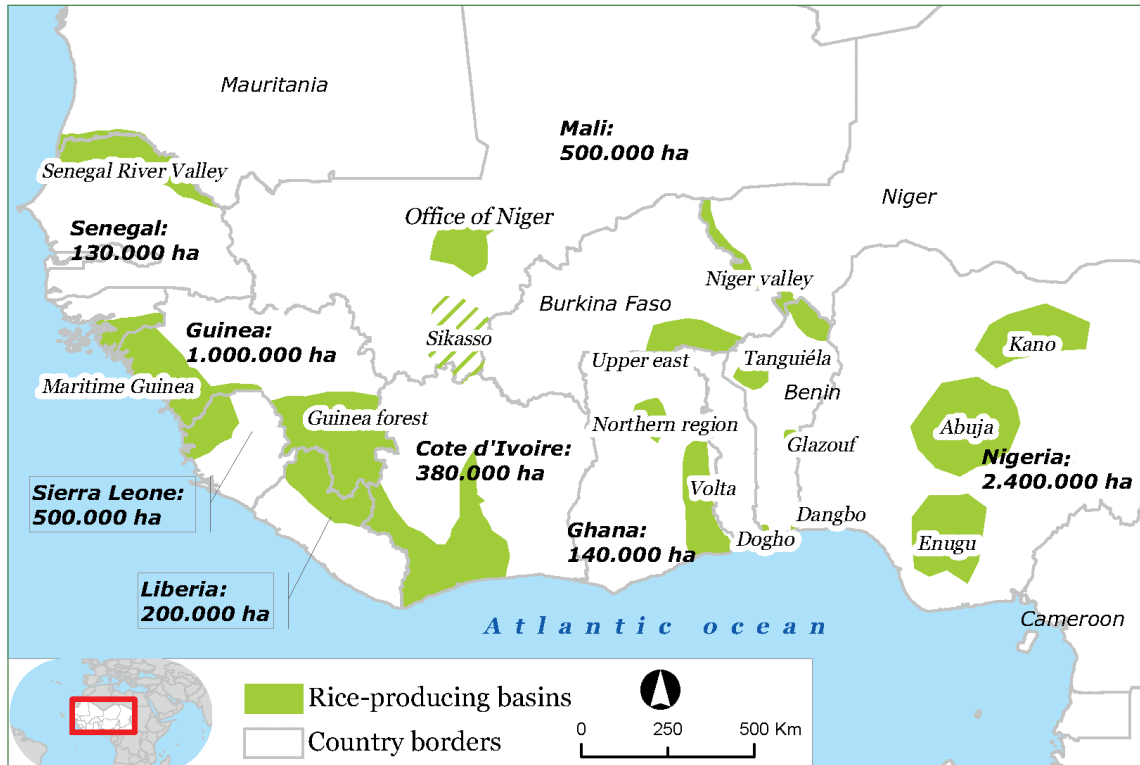


Figure 10.1 Rice production basins in West Africa



Source: del Villar, *et al.*, 2011.

carefully packaged and branded rice to middle-class consumers.

The import market is also differentiated, with its largest part devoted to the mass market, but with imports of higher quality rice targeting upper-income consumers. In Nigeria, in an attempt to boost domestic milling of rice, the government has banned imports of non-parboiled (polished) rice, limiting imports to rough and brown rice.

Rice preferences are highly differentiated across the region, and agroprocessing procedures and import patterns reflect these differences. For example, Senegalese consumers overwhelmingly prefer 100% broken rice, considered to be low quality on the international market; Guinean and Nigerian consumers prefer parboiled rice, and Nigeria also has the largest market for whole grain, higher quality rice (including large quantities of imported, parboiled rice). Within each country, consumers further differentiate themselves according to cost and quality considerations. In Mali, for example,

the agricultural market information system distinguishes four major market segments: the bulk of the market (80–85%) is accounted for by 35–40% broken rice, of mediocre quality, originating from both national production and imports. A further 10% of the market is made up of somewhat higher quality 10–15% broken, while the remainder of the market (5 to 10%) is split between long-grain rice (with no broken), originating mainly from local production, and imported aromatic rices that are used mainly on special occasions (Diarra *et al.*, 2011). Preferences between imported and locally produced rice also vary by country and income segment, but there is a general perception that imported rice is of more consistent quality, with fewer impurities.

To accommodate these diverse production systems and consumer preferences, processing of rice also takes various forms across the region, involving both parboiling and milling. Milling is largely small-scale, using Engelberg-type de-hullers that are frequently up to 30 years old, often imported