

# How Can West African Rice Compete in Urban Markets? A Demand Perspective for Policymakers

Comment le riz ouest-africain peut-il rivaliser sur les marchés urbains? Une perspective de la demande pour les décideurs de l'action publique

Wie kann westafrikanischer Reis auf städtischen Märkten konkurrieren? Eine Nachfrageperspektive für politische Entscheidungsträger

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In West Africa, rice is the third largest source of calories, and its importance is growing rapidly as the result of population growth, urbanization and changing food preferences. While West African consumers increasingly demand more rice, domestic production is growing at a slower rate leading to a huge gap filled by massive imports. Recent estimation from USDA (2017) data shows that the rice self-sufficiency ratio, an indicator that measures the share of domestic production in total consumption, averaged 54 per cent over the period 2010–2015. In 2015, West African countries imported more than

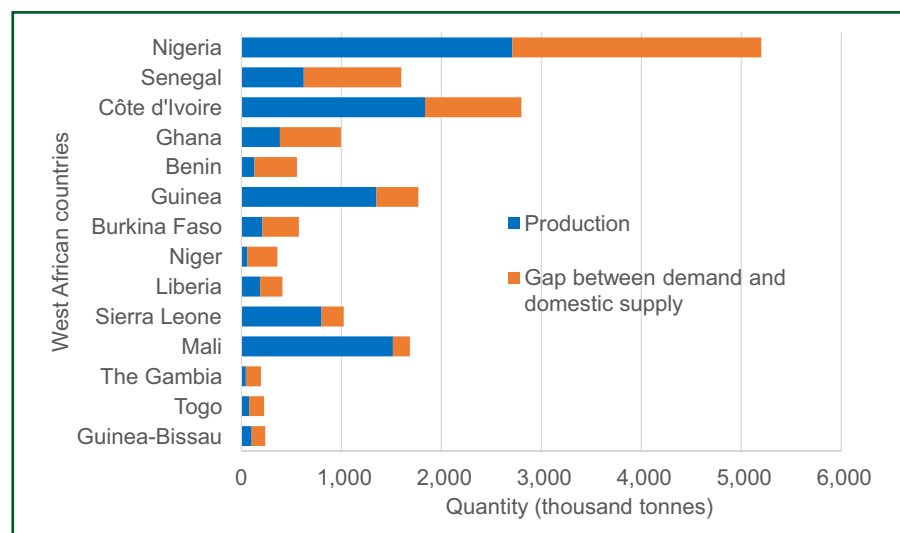
7.6 million tonnes of rice with an import bill amounting to US\$ 4 billion – a substantial outflow of foreign exchange from these relatively developing countries (USDA, 2017). Top importers (Figure 1) are Nigeria (2.5 million tonnes), Senegal (0.97 million tonnes) and Côte d'Ivoire (0.96 million tonnes) (USDA, 2017).

The reliance of West Africa on rice imports is, however, particularly striking as the region has enormous potential to increase domestic rice production. Nearly 90 per cent of the region's rice imports are from Asian countries such as Thailand and India

(Figure 2),<sup>1</sup> many of which have a production environment similar to that of West Africa but are net rice exporters. At the same time, there is little to no intra-regional rice trade to move local rice, within and across countries, from high production hubs to urban consumption zones (Grow Africa, 2017).

“ La protection seule ne suffit pas à accroître de façon spectaculaire l'autosuffisance en riz de l'Afrique de l'Ouest. ”

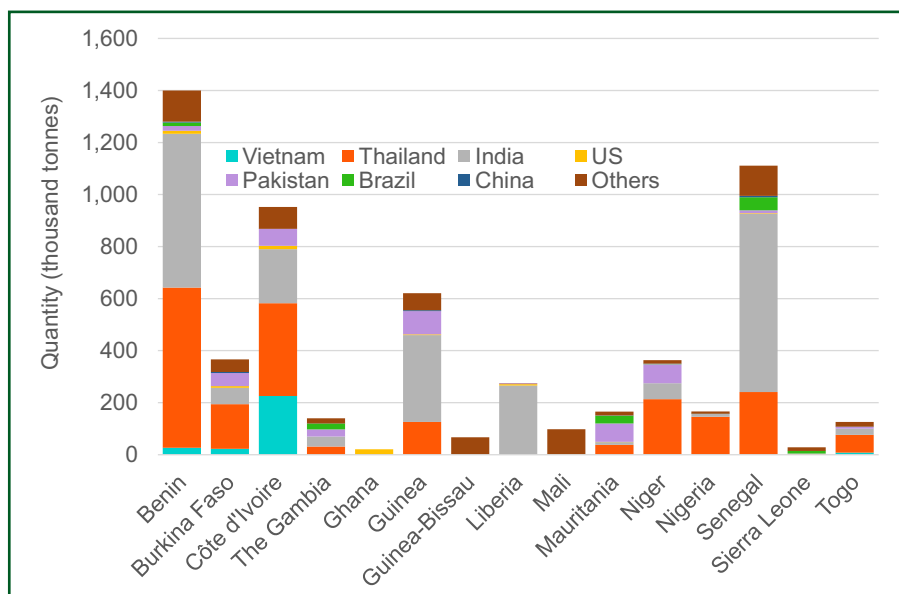
Figure 1: Gap between demand and domestic supply of rice, by country, in West Africa in 2015



Source: USDA (2017).

Recognizing that a heavy reliance on imports is too risky, as painfully shown by the 2007–2008 food crisis, policymakers in West Africa are increasingly interested in conceptualizing and implementing policies and strategies to develop the rice sector and boost domestic production. Thus, since 2008, various national and regional policy and strategic initiatives aiming to support rice farmers have emerged. Notable examples include the Grande Offensive Agricole pour la Nourriture et l'Abondance (GOANA) in Senegal,<sup>2</sup> Coalition for African Rice Development (CARD),<sup>3</sup> the Agricultural Transformation Action Plan (ATAP) in Nigeria,<sup>4</sup> and the FAO-led Amélioration de la production de riz en Afrique de

**Figure 2: West Africa main rice suppliers by country in 2014**



Sources: USDA (total imports from USA); International Trade Centre calculations based on UN COMTRADE statistics (for imports from Vietnam, Thailand, India, US, Pakistan, China, Brazil).

l'Ouest (APRAO).<sup>5</sup> A common feature of these policies and strategies is their narrow focus on increasing supply through area expansion and productivity enhancement. The underlying assumption is that local rice is competitive against imported rice in terms of price and/or quality, and, therefore, increasing the production of local rice will automatically result in an increase in its consumption. This assumption may, however, not necessarily hold. Research has shown that urban consumers tend to perceive local rice as having a lower quality than imported Asian rice (Coulibaly *et al.*, 2015; Demont *et al.*, 2017; Fiamohe *et al.*, 2015a; Stryker, 2013). Local rice sold in urban markets often lacks attributes such as good physical appearance,

cleanliness, beautiful packaging, and labels that are attractive to urban consumers, who for a long time have been exposed to rice imported from Asia (Demont *et al.*, 2017). Surprisingly, however, quality and marketing aspects were either overlooked or not sufficiently emphasised in recent policy initiatives.

In this article, we provide empirical support for the hypothesis that overlooking the demand side of the rice value chain and failing to address quality and marketing issues is likely to undermine efforts made on the supply side to boost production and reduce dependency on imports. While we recognise the urgency of increasing the quantity of local rice, we highlight the



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importance of two other areas where progress needs to be made:

- Quality and marketing: addressing quality and market issues to make local rice attractive and shift urban consumer preferences to local rice.
- Trade policies: devising adequate trade policies to protect smallholder rice farmers and strengthen their competitiveness against imported rice.

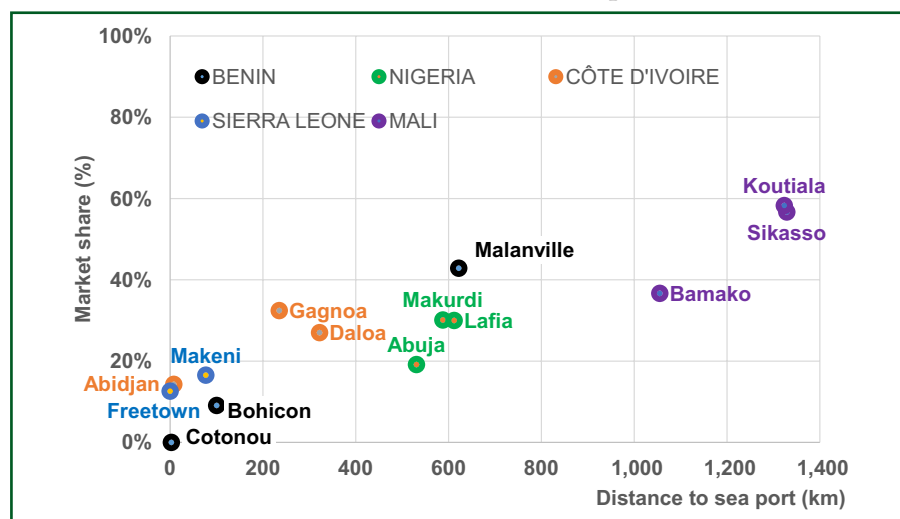
We identify these two issues as important medium-term actions that need to be implemented to complement ongoing efforts to boost production. Improving the quality of locally produced rice will not only attract urban consumers but will also allow farmers and other actors along the rice value chain to receive a price premium and earn a higher income. Moreover, trade policies that partially shield the local rice sector against unfair competition with imported rice are necessary in order to create room for policies aimed at boosting production to produce substantive effects.

We support our hypothesis with evidence from various studies that have been conducted in various settings. The rest of the article is structured as follows. First, we provide an overview of rice consumption patterns in urban zones in West Africa with a particular focus on the challenges facing locally produced rice in these markets. Second, we discuss the results of a recent *ex-ante* impact assessment of the common external tariff (CET) on the rice economy in West Africa. Third, we proceed to discussing the results of an experiment that elicited consumers' willingness to pay (WTP) for upgraded local rice. Finally, we examine the potential for harmonised common external tariffs to curb the flow of imported rice while offering adequate protection and support to the domestic rice sector.

### Overview of rice markets in West African urban consumption zones

In West Africa, rice is predominantly consumed in urban areas which are supplied by both domestic producers and importers. To better understand the challenges facing local rice in these markets, we look at two main indicators: market shares and prices.

**Figure 3: Market shares of locally produced rice in selected West African urban markets in relation to distance to the closest seaport (2013–2016)**



Source: AfricaRice market surveys (2013 and 2016).

Market data collected by AfricaRice over the period 2013–2016 indicate that less than 30 per cent of rice supplied on average in the main urban markets in West Africa is sourced locally. This number hides important heterogeneity. As we would expect, the market share of domestic rice decreases with the distance to the main seaports (Figure 3). In fact, in cities closer to seaports, imported rice has easier access to consumers. In coastal urban markets such as Cotonou and Porto-Novo in Benin, local rice is rarely available (Figure 3). Surprisingly, however, we also find that in a place like Koutiala in Mali that is located in the main rice-producing hub, imported rice has a market share as high as 40 per cent. This observation holds for most major cities that are not seaports.

From these observations, imported rice appears to have less difficulty in reaching the hinterlands and competing against local rice in production areas than local rice has in reaching coastal markets and competing against imported rice.

Additionally, a recent study by Demont *et al.* (2017) argues that imported rice occupies a dominant position in urban markets in West Africa in part because these areas have been exclusively served with imported rice for a long time. An immediate consequence of this long-term exposure to imported rice is that urban consumers have developed a persistent preference for it. They also perceive imported rice as having superior quality. Thus, on urban

markets, local and imported rice are perceived by urban consumers to be weakly substitutable, and an increase in production does not fully translate into an increase in urban consumption. This perception of low quality constitutes an additional challenge faced by locally produced rice in West Africa in gaining market share in urban markets.

Another indicator of the challenge faced by local rice relates to the price difference with imported rice. A study by AfricaRice (Box 1) shows that, in most urban markets in West Africa with the exception of Abidjan, Côte d'Ivoire and Bamako, Mali, imported rice fetches substantial price premiums. The price premium ranges from 2 per cent in Sikasso in Mali to 33 per cent in Malanville in Benin (Figure 4). These differences in price remain high even when local rice has a comparable grain quality with quality tested by grain quality specialists. The price premium for imported rice could be attributed to

higher quality especially related to cleanliness, attractive packaging, and a better reputation. The positive price premiums for local rice observed in Mali are consistent with consumers' strong preference for local rice varieties such as *Gambiaka* (N'krumah *et al.*, 2013).

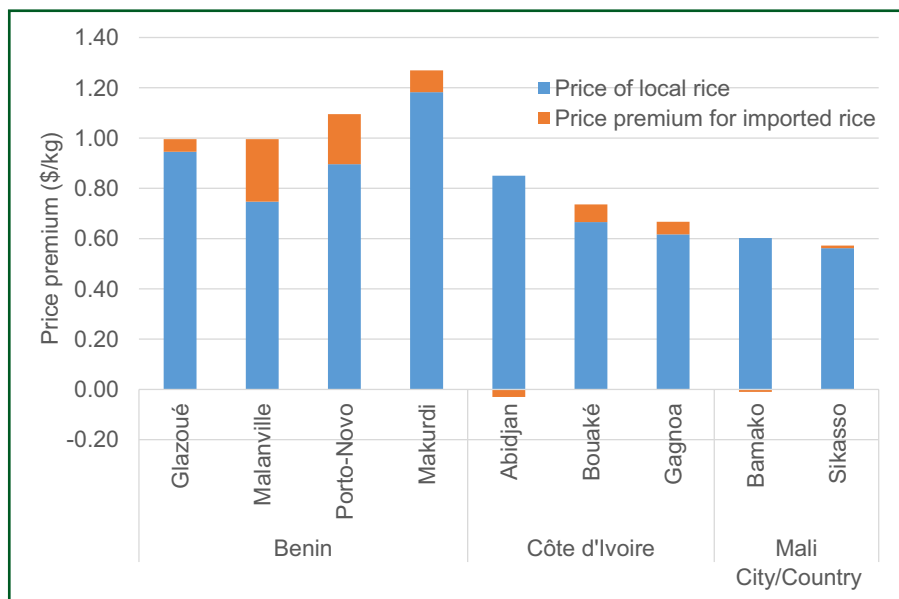
### Effects of the Common External Tariff on the West African rice economy

Tackling the challenges facing the local rice market requires a range of policies on both the supply and demand sides of the rice value chain. To curb the rapid inflow of imported rice and provide space for the domestic sector to develop, there is particular need for sound trade policies. In 2013, the Economic Community of West African States (ECOWAS) adopted the final structure of the community Common External Tariff (CET). The ECOWAS CET sets a 10 per cent tariff on imported milled rice. Some scientists and stakeholders in the region deemed this protection to be too low to effectively contribute to achieving self-sufficiency in rice at the regional level (AfricaRice, 2013; Mendez del Villar and Lançon, 2015). In most other regions of the world, rice trading, relative to other major grains, is widely subject to strong protectionist policies. Countries enforce these policies on the ground that rice is strategic for national food security, and there is a need to support domestic producers and stabilise its price for consumers (GRiSP, 2013). In 2014, the Regional Network of Farmers' Organizations and Agricultural Producers in West Africa (ROPPA) advocated for an increase of the ECOWAS CET from 10 to 35 per cent to protect domestic

#### Box 1: Market surveys in five West African countries

From 2013 to 2016, the Africa Rice Center (AfricaRice) conducted market surveys in urban markets in five West African countries: Benin, Côte d'Ivoire, Mali, Nigeria and Sierra Leone. The main cities of each country linked to high-priority intervention areas for rice sector development were purposely selected by local experts, taking into account population, spatial distribution and distance from main seaports in the region. A total of 47 cities were selected and in each city, one to four main markets were purposely selected giving a total of 65 markets in the five countries. Market surveys were carried out on a total sample of 1,453 sellers (comprising 54 per cent females) to estimate the market share of local rice in the rice basket. A total of 885 rice brands/types, of which 22 per cent were local rice, were inventoried in the selected markets.

**Figure 4: Average price of locally-produced rice and price premiums paid for imported rice in selected West African urban markets**



Source: AfricaRice market surveys (2013 and 2016).

production against massive rice imports. In line with this proposal, Fiamohe *et al.* (2015b) assessed the *ex-ante* impact of the proposed 35 per cent CET on the regional rice economy to determine its feasibility. The study shows that the impact of such a change in tariff is heterogeneous across Member States. The 35 per cent CET, if implemented, would significantly reduce rice imports in the West African Economic and Monetary Union (UEMOA) countries. The reduction in imports would range from 6 per cent in Côte d'Ivoire to 30 per cent in Guinea. The increase in tariffs up to 35 per cent is, however, still insufficient to curb imports in non-UEMOA countries. Consequently, rice imports would increase rather than decrease in non-UEMOA countries ranging from 10 per cent in Nigeria to 104 per cent in Ghana (Fiamohe *et al.*, 2015b). While the reduced imports in UEMOA countries will lift rice self-sufficiency ratios up by only 4 percentage points, none of the countries is expected to achieve full self-sufficiency. Similar results have been obtained in other recent simulation analyses. Coulibaly *et al.* (2015) demonstrate that a 35 per cent CET certainly reduces import dependency in Côte d'Ivoire. This was, however, insufficient to improve social welfare due to the current weak substitution of imported rice by low-quality local rice. This serves as a reminder that only a combination of

policies that address quality, marketing and trade issues would be effective in improving rice value chains and production in West Africa.

“ Protektion allein reicht nicht aus, um die Selbstversorgung mit Reis in Westafrika erheblich zu erhöhen. ”

The take-home lesson from these analyses is that protection alone is insufficient to dramatically increase rice self-sufficiency in West Africa. A combination of tariff protection and

investment in rice value chain upgrading would be more effective in reducing import dependency by enabling locally produced rice to compete with imported rice in terms of both production costs and quality standards (Coulibaly *et al.*, 2015; Demont *et al.*, 2017).

### Urban consumers' willingness to pay and stated demand for upgraded locally-produced rice

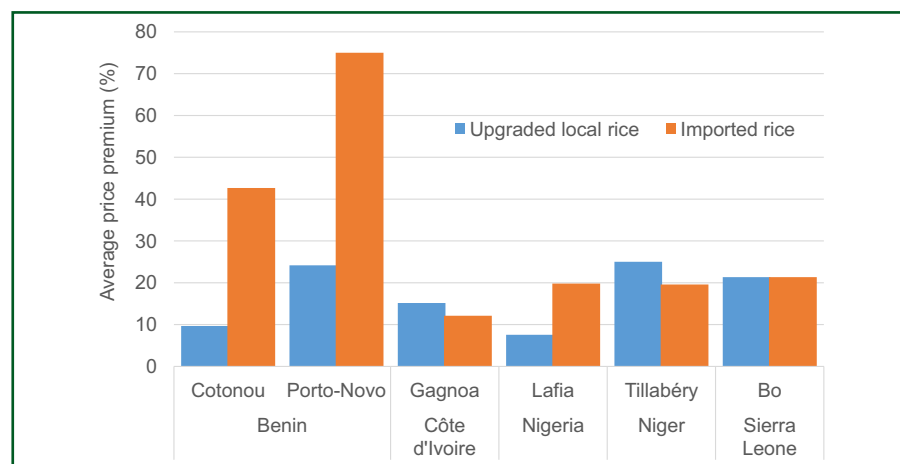
Can local rice effectively compete against imported rice on West African urban markets? This question is fundamental to policymakers as they explore options to develop the domestic rice sector. To answer this question, we analyzed data collected by AfricaRice in 2015 and 2016 during framed field experiments (see Demont *et al.*, 2017 for a complete description of the methodology) to understand consumer preferences for rice. These experiments aimed at eliciting urban consumers' willingness to pay (WTP) for imported and locally-produced rice with upgraded quality attributes. The experiments took place in six urban markets: Cotonou and Porto-Novo in Benin; Gagnoa in Côte d'Ivoire; Lafia in Nigeria; Tillabéry in Niger; and Bo in Sierra Leone.

The results indicate that urban consumers are willing to pay price premiums for local rice with upgraded quality. The price premiums for upgraded local rice compared to local rice produced using traditional methods range from 8 to 25 per cent. These premiums remain, however, lower than those for imported rice in some coastal countries such



Imported rice market in West Africa

**Figure 5: Price premiums (%) paid by consumers to upgrade standard locally produced rice to imported and upgraded locally produced rice in selected West African urban markets**



Source: AfricaRice surveys (2015–2016)

as Benin and Nigeria, which are in the range of 12 to 75 per cent (Figure 5). These results show that the current quality-upgrading strategies for local rice are not sufficient to close the gap between local and imported rice. They call for more comprehensive action and investment in upgrading postharvest quality by enhancing the systems of drying, storage, milling, parboiling, cleaning and sorting as well as marketing (Demont *et al.*, 2017). These investments could help increase the quality of local rice to standards demanded by urban consumers.

The experiments also attempted to elicit consumers' stated demand for local rice with upgraded quality at the price levels they revealed. Surprisingly, a majority of consumers stated that they would buy local rice if it were upgraded and had the attributes they preferred. Stated demand for upgraded local rice in terms of market shares ranged from 62 per

cent in Cotonou in Benin to 93 per cent in Tillabéry in Niger. If targeted investments are made and policies implemented, total urban demand for local rice with upgraded quality in the four countries studied would be sufficient to replace 96 per cent of rice imports (Demont *et al.*, 2017).

#### ***Ad hoc* policies for supplying high-quality rice in urban markets**

Evidence presented in this study shows that there is a huge market opportunity for high-quality local rice in West Africa. In this section, we propose a set of *ad hoc* policies that could be implemented to allow rice value chain actors, including farmers, to tap into this potential.

First, while it is important to develop rice varieties that perform well agronomically, it is equally important that breeders and agronomists emphasise

rice traits that match urban consumer preferences in West Africa. Additionally, advanced postharvest and processing technologies, as well as knowledge of improved practices, should be disseminated to farmers and other value chain actors to increase the quality-competitiveness and market share of locally produced rice in urban markets.

Second, to capture a higher market share in urban markets, there is a need to have a consolidated supply of high-quality paddy from farmers and product standardization. Such standardization would enable efficient governance of the quality of local rice along the value chain. It would also protect farmers, traders and consumers by rendering transactions transparent. It is crucial that farmers capture some of the value generated by quality upgrading; otherwise they have little incentive to produce quality rice.

“ Protection alone is insufficient to dramatically increase rice self-sufficiency in West Africa. ”

Furthermore, improving the marketing of local rice is key to redirect urban consumers to it. Upgrading the extrinsic attributes of local rice through packaging, labeling, branding and promotion would be necessary before local rice can effectively compete against imported rice. For instance, awareness campaigns through the use of various media outlets would help boost consumer awareness and preference for upgraded locally produced rice. Substantial investments in infrastructure such as storage and processing and market facilities are also needed for large-scale commercialization of locally produced rice in urban markets.

Finally, medium-term actions through adequate trade policies would be required to offer adequate protection to local rice. The current level of the ECOWAS CET is arguably too low and should be revisited to effectively protect domestic farmers and other economic



Rice quality assessment through experimental auctions in West Africa

actors from the adverse effects of the heavy reliance on the international market. The tariff can be gradually increased up to 35 per cent, which is the upper limit in the current CET. As the results of various simulations we discussed show, a simple increase in tariff up to 35 per cent would however, be insufficient if not enforced by accompanying measures and implemented in conjunction with other domestic supply and demand policies.

In terms of policy sequencing, we advocate that quality upgrading should be the first step, followed by a gradual increase in CET as the region's self-sufficiency ratio increases. Meanwhile, it would also be possible to establish a flat-rate levy on the value of rice imports that would

generate the resources necessary to finance the implementation of strategies for the development of the rice sector in West Africa.

### Acknowledgements

Financing from the African Development Bank, Government of Japan, and the CGIAR Research Program on Rice is greatly acknowledged. We further thank the Editor and two anonymous referees for helpful suggestions that improved the paper.

### Notes

1 West African intra-regional rice trade is dominated by illegal cross-border trade and re-exportation that is not well documented (Torres *et al.*,

2017). The data reported in Figure 2 represent only legal trade flows.

2 More information on GOANA is available from: <http://inter-reseaux.org/vie-du-reseau/archives-des-groupes-de-travail/gt-politiques-agricoles-560/article/grande-offensive-pour-la>

3 CARD (2013). Rice for Africa. Available from: <http://www.riceforafrica.org>

4 More information on ATAP, Nigeria Agricultural Strategy is available from: [https://gain.fas.usda.gov/Recent%20GAIN%20Publications/Nigeria%E2%80%99s%20New%20Agricultural%20Strategy\\_Lagos\\_Nigeria\\_11-4-2011.pdf](https://gain.fas.usda.gov/Recent%20GAIN%20Publications/Nigeria%E2%80%99s%20New%20Agricultural%20Strategy_Lagos_Nigeria_11-4-2011.pdf)

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# Summary


## How Can West African Rice Compete in Urban Markets? A Demand Perspective for Policy-makers

 In West Africa, rice produced locally falls short of meeting the demand and preferences of urban consumers. We analyzed the challenges facing local rice in urban markets and identified policies that can be implemented to improve the competitiveness of the regional rice sector. We argue that without addressing the demand side of the value chain, efforts on the supply side might fall short in reducing import dependency. Evidence suggests that while imported rice has easy access to urban markets, local rice faces more challenges in reaching urban consumers. The low market share of local rice in urban markets is in part due to consumers' dislike of local rice as it is perceived as being of inferior quality relative to imported rice. Local rice also tends to fetch lower prices. The experimental studies reviewed suggest, however, that urban consumers are willing to pay price premiums for local rice if its quality is upgraded. We propose a two-stage policy sequence: (i) encouraging investment in quality upgrading; (ii) gradually increasing the Common External Tariff (CET) from 10 to 35 per cent to increase cost-competitiveness of West African rice relative to imported rice. To stabilise and finance the sector, we further advocate the establishment of a flat-rate levy on the value of rice imports.

## Comment le riz ouest-africain peut-il rivaliser sur les marchés urbains? Une perspective de la demande pour les décideurs de l'action publique

 En Afrique de l'Ouest, le riz produit localement ne répond pas à la demande et aux préférences des consommateurs urbains. Nous avons analysé les défis auxquels fait face le riz local sur les marchés urbains et identifié les politiques qui peuvent être mises en œuvre pour améliorer la compétitivité du secteur rizicole régional. Nous soutenons que, sans aborder les questions de demande dans la chaîne de valeur, les efforts du côté de l'offre pourraient ne pas aboutir à une réduction de la dépendance vis-à-vis des importations. Les données suggèrent que si le riz importé accède facilement aux marchés urbains, le riz local a plus de difficultés à atteindre les consommateurs urbains. La faible part de marché du riz local sur les marchés urbains est en partie due au fait qu'il déplaît aux consommateurs car il est perçu comme étant de qualité inférieure à celle du riz importé. Le riz local tend également à être moins cher. Les études expérimentales examinées suggèrent cependant que les consommateurs urbains sont prêts à payer des prix supérieurs pour le riz local si sa qualité est améliorée. Nous proposons des politiques mises en œuvre en deux étapes : (i) encourager l'investissement dans l'amélioration de la qualité; (ii) augmenter progressivement le tarif extérieur commun (TEC) de 10 à 35 pour cent pour accroître la compétitivité-coût du riz ouest-africain par rapport au riz importé. Pour stabiliser et financer le secteur, nous préconisons en outre l'établissement d'un prélèvement forfaitaire sur la valeur des importations de riz.

## Wie kann westafrikanischer Reis auf städtischen Märkten konkurrieren? Eine Nachfrageperspektive für politische Entscheidungsträger

 In Westafrika deckt der lokal produzierte Reis weder die Nachfrage noch die Vorlieben der städtischen Konsumenten. Wir untersuchen die Gründe hierfür und identifizieren mögliche Politiken, die zu einer Verbesserung der Wettbewerbsfähigkeit des heimischen Reissektors beitragen können. Unserer Einschätzung nach sind alle Anstrengungen auf der Angebotsseite zur Reduzierung von Importabhängigkeiten umsonst, sofern die Nachfrageseite der Wertschöpfungskette nicht berücksichtigt wird. Es gibt Anhaltspunkte dafür, dass importierter Reis im Vergleich zu lokal produziertem Reis einen einfacheren Zugang zu städtischen Märkten hat. Der derzeit niedrige Marktanteil des lokal produzierten Reises auf städtischen Märkten ist zum Teil darauf zurückzuführen, dass die Konsumenten mit diesem eine schlechtere Qualität verbinden. Zudem sind die erzielten Preise für heimischen Reis geringer. Experimentelle Studien zeigen jedoch, dass städtische Konsumenten bereit wären, höhere Preise für lokal produzierten Reis zu zahlen, sofern dieser eine bessere Qualität hätte. Wir schlagen eine zweistufige Abfolge von politischen Maßnahmen vor: (1) Förderung von Investitionen in die Verbesserung der Qualität. (2) Eine schrittweise Erhöhung des gemeinsamen Außenzolltarifs von 10 auf 35%, um die Kostenwettbewerbsfähigkeit von westafrikanischem Reis gegenüber importiertem Reis zu verbessern. Des Weiteren plädieren wir zur Stabilisierung und Finanzierung des Sektors für die Erhebung einer pauschalen Abgabe auf den Wert von Reimporten.

summary