



USA RICE

Kenya Market Assessment

I. INTRODUCTION AND OVERVIEW

USA Rice

USA Rice is a nonprofit trade association representing all segments of the U.S. rice industry, including but is not limited to producers, millers, exporters, and merchants, as well as other entities involved in the production and marketing of U.S. rice. The organization was founded in 1994 by the leadership of the industry's three national associations: the Rice Millers Association, USA Rice Council and the USA Rice Farmers (formerly known as US Rice Producers Group).

USA Rice's grower representation includes approximately 90% of the U.S. rice crop. The organization also represents virtually all U.S. rice millers and processors, as well as the nation's major rice exporters, which account for nearly 100% of U.S. rice supplies and exports. Furthermore, associate members of the USA Rice cover almost the entire marketing and distribution channels for U.S. rice.

USA Rice operates a domestic promotion program as well as export promotion programs in more than 20 countries. Programs are funded by both USA Rice members and through various public programs for which USA Rice competes annually.

USA Rice is headquartered in Arlington, Virginia, and has subsidiary offices in Arkansas, Louisiana and Germany. Consultants and agencies are used as appropriate, for a wide variety of projects, including domestic and international promotion programs.

USA Rice is an equal opportunity employer and prohibits discrimination in all programs and activities on the basis of race, color, national origin, gender, religion, age, disability, political beliefs, sexual orientation, or marital or familial status.



II. MARKET SITUATION IN AFRICA

USA Rice views the Africa market as a potential growth market for U.S. rice sales. Many countries in this region have high consumption levels of rice, but do not grow enough rice domestically to meet market demands. The expected strong supply of U.S. rice in the upcoming crop year and price increases of Asian rice offer an opportunity for U.S. rice to make inroads in the market.

As a highly developed market and economy with high levels of agricultural imports, the focus of this current request for proposal is Kenya as a potential destination market, as well as an entry point and regional trading hub for U.S. rice sales.

III. USA RICE OBJECTIVES IN KENYA

USA Rice objectives in Kenya include:

- A. Increasing both the value and volume of U.S. rice exports to Kenya.
- B. Building long-lasting market awareness and preference for U.S. origin rice among consumers.
- C. Providing rice consumers and importers in the region with the information to encourage increased imports of U.S. origin rice.
- D. Positioning the U.S. rice industry as a consistent trading partner for importers in the region.

IV. SCOPE OF WORK

- Conduct a market assessment in Kenya to determine interest levels, demand, and feasibility of exporting to the region. The study will also include research on market potential for brown, rough and broken rice, and re-export capacity. Create list of trade contacts including the trade/importers, packers, wholesalers and retailers, who currently import or could potentially start importing U.S. grown rice. Collect information on regulatory environment, tariffs on rice imports and other potential trade barriers, suppliers to the market, as well as wholesale and retail structure.

The firm or consultant shall successfully complete the market assessment in Kenya in the period May 15, 2025 – August 31, 2025. The firm will work directly with the USA Rice Director Europe, Middle East, and Africa. The agency or individual selected to conduct activities will contract with USA Rice and will be subject to the regulations associated with



programs administered by the Foreign Agricultural Service of the United States Department of Agriculture.

V. PROPOSALS

USA Rice requests that you include the following components in discussing your capabilities:

- A. Describe how you/your agency will achieve the Objectives outlined in Section III and the Scope of Work outlined in Section IV.
- B. Explain why your qualifications and background make you the best individual/agency to represent the USA Rice in Africa (please mention language proficiencies).
- C. Provide information regarding your past work, especially related to representing U.S. agricultural commodities in Africa.
- D. Please detail which of your staff members will make-up the USA Rice team and explain their roles and experience.
- E. Include a monthly retainer of all costs necessary to complete this scope of work including staff fees, third party expenses, administrative overhead, travel, and other direct/indirect costs needed to support your program.
- F. Include any additional information that demonstrates the ability to perform the functions outlined in this Request for Proposal.

VI. CONFLICTS OF INTEREST

Potential conflicts of interest relative to this program are as follows: agency representation of another entity that is directly competitive to rice, e.g., pasta, tortillas, potatoes; or a firm of record for any U.S., or other rice company. Please disclose any conflicts of interest.

Additionally, no USA Rice employee, officer, board member, or agent thereof will participate in the review, selection, award, or administration of a contract if a real or apparent conflict of interest would arise. Such a conflict would arise when an employee, official, board member, agent, or the employee's, officer's, board member's, or agent's family, partners, or an organization that employs or is about to employ any of these parties or their affiliates has a financial or other interest in the contract.

USA Rice officers, employees, board members, and agents thereof shall neither solicit nor accept gratuities, favors, or anything of monetary value from contractors or



subcontractors. Procedures shall also provide for disciplinary actions to be applied for violations of such standards by officers, employees, board members, or agents thereof

VII. SELECTION CRITERIA

USA Rice reserves the right to award the contract to the individual/agency with the best combination of attributes and ability to successfully complete the market assessment, not necessarily the lowest bid. USA Rice also reserves the right to select more than one individual/agency if one cannot fulfill all the duties outlined above.

VIII. ADMINISTRATION

The individual or agency selected for the position will report directly to Director Europe, Middle East and Africa, with further oversight by the Chief Operating Officer.

IX. FINANCIAL

The total budget for all aspects of the market assessment covering Kenya, including all fees, overhead, third party expenses, travel and other expenses is \$15,000 - \$20,000. Submitted proposals should reflect this budget. Funds for this project come from the U.S. Department of Agriculture's Regional Agriculture Promotion Program and are subject to the annual availability of funds in that program.

X. PROPOSAL DUE DATE / PROJECT TIMING

Proposals are due by close of business on April 14, 2025. For the individual or agency selected to complete this scope of work, the contract will run May 15, 2025 – August 31, 2025. If mutually acceptable, the contract may be renewed at the end of the fiscal year at the option of the USA Rice to cover trade servicing and capacity building efforts.

XI. SUBMISSION OF PROPOSALS

Individuals / agencies are invited to submit proposals to USA Rice by close of business 6 PM (Greenwich Mean Time) on April 14, 2025. Please direct your proposal to the following email address: jkincaid@usarice.com

APPENDIX

I- GENERAL OVERVIEW

1- Population

1.1- Demography

1.2- Urbanization

2- Political situation

3- Economic situation

II- LOCAL RICE MARKET

1- Regulations on rice imports

2. Imported rice and countries of origin

Volume of rice imports

Local consumption vs re-export

3. Local Rice Production and processing

4. Rice market structure and distribution outlets

*4.1- The rice supply chain: Local importers,
packers and producers*

- Identify the millers and their contact details, market share
- Identify major importers and their contact details
- Include information and contacts on any governing body with respect to rice.
- Explain the general production process
- How exactly the supply chain works, including the margins incurred at each step
- Paddy rice imports / importers / exporting countries

*4.2- Distributors, role of private trade and
government*



4.3- Consumers

5. Major varieties and brands of rice available, price points

III- WHOLESALE and RETAIL

- 1- The structure of wholesale and retail trade (traditional vs modern trade volume)
- 2- Major wholesale and retail channels for rice purchases
- 3- Geographic concentration of retail