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Report Highlights:

Côte d’Ivoire is one of Africa’s leading palm oil producers, with nearly 400,000 hectares of oil palm trees under cultivation. The sector has large industrial estates in addition to small-holder farmers. FAS Abidjan, Accra (Post) forecasts crude palm oil (CPO) production in market year (MY) 2025/2026 (October-September) at 600,000 metric tons (MT); slightly below the U.S. Department of Agriculture’s (USDA) official forecast figure of 630,000 MT. Post attributes the 30,000 MT statistical variance to projections of increased irregular rainfall, reports of logistical constraints, and variability in the fresh fruit bunch (FFB) arriving at the village plantation level. Post estimates MY 2024/2025 production at 575,000 MT, down 20,000 MT and off 3.5 percent from the MY 2023/2024 figure of 595,000 MT. The Ivorian government is launching a West African CFA francs (XOF) 245.9 billion ($440 million) ten-year investment plan to modernize plantations and strengthen support services.

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EXECUTIVE SUMMARY

Côte d'Ivoire is one of Africa's leading palm oil producers, with nearly 400,000 hectares of oil palm trees under cultivation. The sector has large industrial estates in addition to small-holder farmers. FAS Abidjan, Accra (Post) forecasts crude palm oil (CPO) production in market year (MY) 2025/2026 (October-September) at 600,000 metric tons (MT); slightly below the U.S. Department of Agriculture's (USDA) official forecast figure of 630,000 MT. Post attributes the 30,000 MT statistical variance to projections of increased irregular rainfall, reports of logistical constraints, and variability in the fresh fruit bunch (FFB) arriving at the village plantation level. Post estimates MY 2024/2025 production at 575,000 MT, down 20,000 MT, down 3.5 percent from the MY 2023/2024 figure of 595,000 MT.

Post forecasts palm kernel production for MY 2025/2026 (January-December) at 110,000 MT. Ivorian palm kernel output is expected to remain stable at this volume across the MY 2023/2024-to-2025/2026 period; reflecting consistent kernel recovery linked to crude palm oil throughput. Palm kernel oil (PKO) production, however, is projected to rise slightly to 60,000 MT due to steadier crushing operations.

Côte d'Ivoire's MY 2025/2026 CPO consumption is forecast at 400,000 MT, influenced by steady household demand, but with slower industrial uptake due to competition from low-priced imported Asian olein. Ivorian export volumes, nonetheless, remain good, with neighboring Mali and Burkina Faso being critical export markets. Post is, nevertheless, starting to pick up hints from early MY 2025/2026 data, of indications of softening regional demand. Imports as expected remain low at 17,000–20,000 MT; thanks to adequate domestic local supply and ECOWAS tariff protections.[1] Domestic PKO consumption remains modest at 22,000 to 25,000 MT, while exports average around 30,000 MT yearly.

The Ivorian government is launching a West African CFA francs (XOF) 245.9 billion ($440 million) ten-year investment plan to modernize plantations and strengthen support services. On June 3, 2025, the Palm Oil, Rubber and Coconut Council (*Conseil Hevea Palmier à Huile et Cocotier* – CHPHC) suspended new and or expanded first-stage processing plants to limit overcapacity. Price controls stabilize markets but do put pressure on local refiners. Environmental enforcement and sustainability requirements (e.g., traceability and compliance with the European Union (EU) Deforestation Regulation) are further pressuring the sector's competitiveness.

[1] Members of the West African Economic and Monetary Union (*Union économique et monétaire ouest-africaine* - known also by its French acronym, UEMOA) include Benin, Burkina Faso, Côte D'Ivoire, Guinea-Bissau, Mali, Niger, Senegal, and Togo. The WAEMU member countries are seeking greater regional integration through the unification of external tariffs. As Francophone West Africa's leading economic hub and the world's largest cocoa producer, counting along with a sizeable manufacturing sector, Côte d'Ivoire exerts significant regional influence. See, International Monetary Fund at https://www.imf.org/en/Publications/SPROLLs/WAEMU-362#sort=%40imfdate%20descending.

COMMODITY:

OIL, PALM

Table 1. Côte d'Ivoire: Commodity, Oil, Palm, Production-Supply-Distribution (PSD)

Oil, Palm	**2023/2024**		**2024/2025**		**2025/2026**	
Market Year Begins	**Oct 2023**		**Oct 2024**		**Oct 2025**	
Cote d'Ivoire	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Area Planted (1000 HA)	0	0	0	0	0	0
Area Harvested (1000 HA)	410	300	415	415	420	420
Trees (1000 TREES)	26900	26900	26900	26900	26900	26900
Beginning Stocks (1000 MT)	181	181	118	126	168	220
Production (1000 MT)	615	595	625	575	630	600
MY Imports (1000 MT)	9	15	80	17	50	20
Total Supply (1000 MT)	805	791	823	718	848	840
MY Exports (1000 MT)	382	375	215	178	250	250
Industrial Dom. Cons. (1000 MT)	65	65	70	70	70	70
Food Use Dom. Cons. (1000 MT)	240	225	370	250	330	330
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	305	290	440	320	400	400
Ending Stocks (1000 MT)	118	126	168	220	198	190
Total Distribution (1000 MT)	805	791	823	718	848	840
Yield (MT/HA)	1.5	1.9833	1.506	1.3855	1.5	1.4286
(1000 HA), (1000 TREES), (1000 MT), (MT/HA)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

PRODUCTION

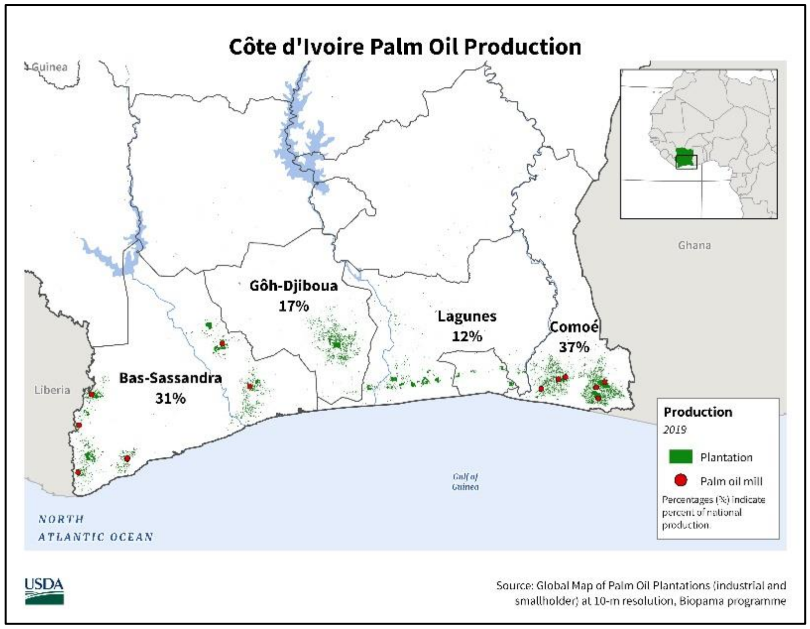
FAS Abidjan, Accra (Post) forecasts Côte d'Ivoire's market year (MY) 2025/2026 (October-September) crude palm oil (CPO) production at 600,000 metric tons (MT); slightly below the U.S. Department of Agriculture's (USDA) official forecast figure of 630,000 MT.[2] Post attributes the 30,000 MT statistical variance, of less than five percent, to projections of increased irregular rainfall, reports of lingering logistical constraints, and anticipated variability in the fresh fruit bunch (FFB) arriving at the village plantation level (for prior production-supply-distribution discussion, see GAIN-CÔTE D'IVOIRE |IV2024-0010| Oilseeds and Products Annual Report – 2024 Revised Update).[3]

Post estimates MY 2024/2025 production at 575,000 MT, down 20,000 MT and off 3.5 percent compared to its MY 2023/2024 figure of 595,000 MT. It attributes the 50,000 MT difference between the USDA official estimate figure of 625,000 MT and its own of 595,000 MT, as resulting from yield

[2] Palm oil is an edible vegetable oil derived from the reddish mesocarp (pulp) of the fruit of the African oil palm (*Elaeis guineensis*). Oil palms produce more oil per unit of land than most other oil-producing plants (e.g., 4.5 times more oil than rapeseed; nine times more than soybeans).

[3] U.S. Department of Agriculture (USDA) – Foreign Agricultural Service (FAS), "GAIN-CÔTE D'IVOIRE |IV2024-0010| Oilseeds and Products Annual Report – 2024 Revised Update," located at: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Oilseeds%20and%20Products%20Report%20-%202024%20Revised%20Update_Accra_Cote%20d%27Ivoire_IV2024-0010.

recovery remaining slow, as well as reports of logistical difficulties confronting small-holder farmers that are limiting fruit collection in several production zones. Post is adopting a more conservative posture accounting for operational issues concerning irregular rainfall, delays in plantation maintenance, and road access problems, all of which are lowering FFB deliveries to mills. Field reports indicate lingering weak productivity in numerous village plantation clusters, especially during the mid-harvest period. Taken together, these trends point to continued production variability despite ongoing investments in the sector.



For MY 2025/2026, there are also several other structural factors affecting production prospects. Field sources inform that a large and increasing number of industrial and village plantations are approaching the 15-year mark; that is, reaching a point when commercial productive output normally declines.

Although replanting programs are underway, progress is slow; limiting the overall pace of recovery. Post observes a decline in village-sourced fresh fruit bunches available for the processing mills, with less purchases being made by domestic refiners. There is also increased competition at the same time coming from the informal buyers, when there is already an upswing in the presence of low-price, subsidized Asian olein floating in the regional marketplace. These market distorting factors are lowering the incentive for farmers to sell to the formal mills; even though production potential has not decreased.

Ivorian industrial plantations contribute the bulk of national crude palm oil output. Major players include PALMCI (SIFCA Group), SIPEF-CI (UOC), Palmafrique, SOGB, and Dekel Oil. These companies are investing in mill upgrades, improving transport systems, and are also expanding processing capacity to improve efficiency. PALMCI's recent acquisition of additional plantation land is expected to boost production beginning in MY 2025/2026. Several mills are also increasing their focus on exports to counter the financial impact of domestic price controls set by the Ivorian government. However, the industry remains highly dependent on village plantations for its FFB supply, which still represents most available fruit. This makes small-holder productivity and market incentives key factors for shaping national production levels.

CONSUMPTION

FAS Abidjan, Accra forecasts Côte d'Ivoire's MY 2025/2026 palm oil total domestic consumption at 400,000 MT. Post is wary of the pace of recovery in industrial demand and that of household purchasing power. Palm oil is nonetheless a staple food product with strong cultural and dietary importance. Côte d'Ivoire's current economic conditions, however, suggest steady rather than accelerated growth in domestic consumption in the MY 2025/2026 period.

Tropical Oilseeds, Palm Fresh Fruit, Loose; Palm Fresh Fruit Bunch (FFB)

Source: FAS Abidjan, Accra.

Post estimates MY 2024/2025, domestic consumption at 320,000 MT, varying by 50,000 MT and 13.5 percent from the USDA official figure of 370,000 MT. Post's discrepancy accounts for adjustments reflecting lower-than-expected absorption by refiners and food processors. These are confronting reduced export opportunities within the West Africa regional market due to increased competition from low-price, subsidized Asian olein. These pressures are constraining refinery operations and encouraged more conservative procurement strategies throughout MY 2024/2025. At the household level, updated data shows stable usage patterns, although elevated edible oil prices and broader inflation have tempered consumption in certain urban and peri-urban areas.[4]

For MY 2023/2024, Post maintains total domestic consumption at the 290,000 MT level, which is slightly below the USDA official figure of 305,000 MT. Ivorian processors inform that demand in MY 2023/2024 was adversely influenced by rising production costs and reduced refining margins. These factors limit processors' ability to expand output and or absorb additional crude palm oil volumes. These constraints contributed to a gradual rather than a robust growth trajectory in national consumption.

[4] Peri-urban areas are transitional zones located between cities and rural surroundings. These areas possess a combination of urban and rural characteristics and land uses, where lifestyle mix and may clash. It will include built up suburbs and rural landscapes, along with residential developments, agricultural land, and light industrial zones. In terms of food security, peri-urban areas provide fertile ground for urban and peri-urban agriculture (UPA). UPA food production builds up the resilience of a city's food supply; ensuring fresh food is available and accessible close to urban markets. See, Food and Agricultural Organization of the United Nations (FAO), "Urban and Peri-Urban Agriculture," located at: https://www.fao.org/urban-peri-urban-agriculture/en.

Domestic consumption patterns are influenced by the structure of the Ivorian refining and processing sector. Here a small group of large industrial operators account for the bulk of the country's installed capacity. Their ability to secure crude palm oil, maintain steady throughput, and remain competitive against imported refined products plays a central role in determining how CPO is absorbed locally. Post observes that in recent years, their activity levels have been affected by increased competition in regional export markets, slower growth in domestic demand, and government controls on retail prices for several consumer goods. These conditions limit the pace at which refiners can expand output.

TRADE

Côte d'Ivoire (larger than the State of New Mexico) sits on West Africa's Atlantic coast on the Gulf of Guinea between Ghana and Liberia; its youthful population (60 percent is under 25 years-of-age) of over 29.9 million (Central Intelligence Agency, 2024 estimate) is growing at 2.13 percent, with urbanization at 53 percent.[5] Côte d'Ivoire, like neighboring Ghana, is a lower-middle income country. It is nonetheless one of West Africa's most influential, stable, and rapidly developing economies, with poverty declining in urban areas, albeit lingering in rural areas. It is heavily dependent on agriculture and related activities, which engage two-thirds of the populace.[6] Côte d'Ivoire is the world's largest producer and exporter of cocoa beans (2 million metric tons – MMT), among the top-10 producers of coffee (i.e., robusta), palm oil (575,000 MT), and cashew nuts (1.1 MMT). Even so, the country has a sizable manufacturing sector, allowing it to exert regional economic and political influence.

Exports: FAS Abidjan, Accra forecasts Côte d'Ivoire's MY 2025/2026 palm oil exports at 250,000 MT, growing by 72,000 MT or over 40 percent compared to Post's MY 2024/2025 estimate of 178,000 MT. Post foresees, premised on recently updated trade data reports, that Ivorian palm oil exports will continue growing at a steady but moderate rate with regional demand improving but fluctuating due to developments (i.e., increased instability) in the Sahel.[7]

Ivorian palm oil exports going overseas move primarily through the Abidjan and San Pédro ports. These exports consist mostly of crude palm oil, with smaller quantities of palm kernel oil (PKO). The neighboring Sahelian (and former ECOWAS members) states of Burkina Faso and Mali remain Côte d'Ivoire's top regional overland export destinations.[8] However, in January-September 2025, Burkina

[5] Côte d'Ivoire's population, at 29.9 million (Central Intelligence Agency, 2024 estimate) is likely to continue growing for the foreseeable future since about 60 percent of the populace is under 25-years of age (as of 2020); the total fertility rate is holding steady at 3.5 children per woman, and contraceptive use is less than 30 percent.

[6] Agriculture accounts for 25 percent of GDP and 6 percent of export receipts. Besides cocoa and cashew nuts, Côte d'Ivoire exports coffee, rubber, cotton, palm oil, and bananas. The country imports wheat, corn meal, and dairy products and is the fifth-largest rice importer in the world, with 1.25 million metric tons (MMT) per year. It is the sixth-largest producer of milled rice in sub-Saharan Africa. The country produced 2.3 MMT of milled rice in 2022. The Ivoirian government aims to be self-sufficient in milled rice by 2030. It seeks to increase domestic production to 2 MMT by 2025 from its current 1.48 MMT. To be self-sufficient, it needs to produce 2.5 MMT of milled rice. Côte d'Ivoire is self-sufficient in most staple foods.

[7] Instability in Burkina Faso, Mali, and Niger results from the interaction of worsening insurgencies, political transitions resulting from military coups d'etats (2020-2023, coup epidemic with the juntas rising to power promising to restore security but themselves struggling to contain the violence), and growing environmental and economic pressures. The Sahel region remains a global epicenter for conflict and humanitarian crises. The Sahel faces an insurgency led by groups such as Jama'at Nusrat al-Islam wal-Muslimin (JNIM) (al-Qaeda affiliate) and the Islamic State Sahel Province (ISSP).

[8] The Economic Community of West African States (ECOWAS) is a regional political and economic union consisting of twelve (12) countries in West Africa. Collectively, the countries comprise an area of 2,332,770 square kilometers (900,684

Faso imported 46,736 MT, down from 59,651 MT one year earlier (down 22 percent), while Mali imported 43,351 MT, compared with 57,970 MT over the same period in 2024 (down 25 percent). These declines reflect temporary adjustments in procurement strategies among Sahelian refiners, combined with slower offtake from food processors and tighter financing conditions across the region.

Exports to the Netherlands (15,055 MT), Italy (3,058 MT), and Spain (4,015 MT) all similarly dropped compared to the January-September 2024 period, while flows to Nigeria (13,712 MT) and Senegal (11,772 MT) remained comparatively more resilient. Shipments to other West African markets also softened. Together, these patterns illustrate a broad regional slowdown rather than a shift in underlying market fundamentals. Demand from Sahelian processors remains good, but short-term import needs have moderated due to inventory adjustments, exchange rate pressures, and rising logistics costs.

Imports: FAS Abidjan, Accra forecasts Côte d'Ivoire's MY 2025/2026 palm oil imports at 20,000 MT, slightly above its MY 2024/2025 estimate of 17,000 MT. Post forecasts modest import levels, reflecting Côte d'Ivoire's ability to meet most domestic consumption requirements through local production. At the same time, Ivorian refiners having scaled back activity in recent years, are also cutting imports.

Côte d'Ivoire's three main suppliers, accounting for the near entirety of import supply are: 1) Malaysia; 2) Liberia; and 3) Indonesia. During the MY 2019/2020 to MY 2024/2025 period, Malaysia supplied 62,282 MT, Liberia 75,937 MT, and Indonesia 51,077 MT. Year-to-year volumes, however, fluctuate driven by shifts in international market dynamics and the availability of locally produced crude palm oil.

For example, imports from Liberia stabilized in MY 2024/2025 at 5,975 MT; after coming in MY 2023/2024 at 5,888 MT, then already down by 77 percent in relation to MY 2022/2023's volume of 25,882 MT. This contraction reflects supply constraints in neighboring Liberia, coinciding with reduced demand from Ivorian refiners. Shipments originating in Malaysia and Indonesia are also evidencing a similar downward trend. China, India, and Indonesia (i.e., counting with an expanded biodiesel mandate) are displacing product availability away from the West African markets.

Post foresees Côte d'Ivoire's palm oil imports remaining relatively low over the next two-years. It is anticipated that domestic production will remain steady, refiner demand will stay moderate, and non-ECOWAS-origin imports will remain costly. Imports will be used to supplement domestic seasonal production gaps and or unexpected domestic shortfalls in production; rather than act as a major component of national supply.

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square miles), with an estimated population now of 348 to 352 million following the exit of Burkina Faso, Mali, and Niger in January 29, 2025. These three Sahelian states, before withdrawing from ECOWAS, had accounted for 2,781,431 square kilometers (1,073,912 square miles) out of the bloc's earlier 5,114,162 square kilometers (1,974,589 square miles). Total pre-exit ECOWAS population stood at over 424 million; with Burkina Faso, Mali, and Niger accounting then for 73 to 76 million people, or about 16 percent of the total population. The remaining 12-member states include: Benin; Cape Verde; Côte d'Ivoire; The Gambia; Ghana; Guinea (suspended); Guinea-Bissau; Liberia; Nigeria; Senegal; Sierra Leone; and Togo. The withdrawal of the three Sahelian states reduced the size and geographic reach of the ECOWAS bloc. While not the most economically powerful members, the Sahelians' (i.e., Alliance of Sahel States – AES) departure is a blow to regional unity, strains regional diplomatic and security cooperation, and undermines the bloc's influence. The split impacts regional food security and trade, but the landlocked Sahelians are maintaining free trade with ECOWAS members and their coastal maritime ports.

COMMODITY:

OILSEED, PALM KERNEL

Table 2. Côte d'Ivoire: Commodity, Oilseed, Palm Kernel, Production-Supply-Distribution (PSD)

Oilseed, Palm Kernel	**2023/2024**		**2024/2025**		**2025/2026**	
Market Year Begins	**Jan 2024**		**Jan 2025**		**Jan 2026**	
Cote d'Ivoire	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Area Planted (1000 HA)	300	0	300	0	300	0
Area Harvested (1000 HA)	410	300	415	300	420	300
Trees (1000 TREES)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	1	1	1	1	1	1
Production (1000 MT)	144	106	144	110	144	110
MY Imports (1000 MT)	2	1	1	1	2	1
Total Supply (1000 MT)	147	108	146	112	147	112
MY Exports (1000 MT)	1	0	0	0	1	1
Crush (1000 MT)	142	104	142	108	142	110
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	3	3	3	3	3	0
Total Dom. Cons. (1000 MT)	145	107	145	111	145	110
Ending Stocks (1000 MT)	1	1	1	1	1	1
Total Distribution (1000 MT)	147	108	146	112	147	112
Yield (MT/HA)	0.3512	0.3533	0.347	0.3667	0.3429	0.366
(1000 HA), (1000 TREES), (1000 MT), (MT/HA)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

PRODUCTION

FAS Abidjan, Accra forecasts Côte d'Ivoire's MY 2025/2026 (January-December) palm kernel production at 110,000 MT, largely unchanged from its MY 2024/2025 estimate. Post's somewhat more conservative estimations are premised on the assessment of fresh fruit bunch (FFB) availability and palm kernel recovery rates across the sector. Palm kernel output being directly tied to the volume of FFB processed by mills, will mirror the recent moderation observed in crude palm oil (CPO) throughput.

Industrial plantations and large-scale operators such as PALMCI, SOGB, and SIPEF-CI continue to account for the bulk of palm kernel recovery. However, overall production remains constrained by persistent structural factors, including uneven fruit supply from village plantations, limited mill capacity in certain areas, transport delays, and fluctuations in FFB quality. These elements collectively help explain why palm kernel production is stabilizing closer to the 110,000 MT mark.

CONSUMPTION

Palm kernel consumption closely mirrors production trends, being almost entirely absorbed within Côte d'Ivoire. Post forecasts total domestic consumption at 110,000 MT in MY 2025/2026, with similar levels estimated for MY 2024/2025 and MY 2023/2024. The domestic market absorbs nearly all available palm kernels, reflecting alignment between production volumes and local processing demand. Palm kernel utilization in Côte d'Ivoire is closely linked to the capacity of industrial crushing facilities, which remain the primary outlet for this raw material. As palm kernel demand is driven mainly by processing needs rather than by standalone commercial or household use, annual fluctuations remain modest and largely dependent on the quantity and quality of kernels supplied by mills. This results in a stable absorption pattern that follows production levels from one marketing year to the next.

TRADE

Côte d'Ivoire's limited palm kernel trade activity reflects the structure of the domestic value-chain, where palm kernels are overwhelmingly retained for local processing rather than international exchange. As a result, palm kernel flows are largely earmarked for domestic utilization, with cross-border movements serving only as minor adjustments during occasional production supply imbalances.

Exports: Palm kernel trade remains marginal within the Ivorian broader oil palm sector. Post forecasts in MY 2025/2026 palm kernel exports of 1,000 MT. The volume is in line with the low and relatively stable figures observed in recent years.

Imports: Historically, Côte d'Ivoire has imported small consignments of palm kernel from neighboring Liberia. This import volume is declining over time and is foreseen to remain at the 1,000 MT level, or lower, in the short- to medium-term.

COMMODITY:

OIL, PALM KERNEL

Table 3. Côte d'Ivoire: Commodity, Oil, Palm Kernel, Production-Supply-Distribution (PSD)

Oil, Palm Kernel	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jan 2024		Jan 2025		Jan 2026	
Cote d'Ivoire	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	142	104	142	108	142	110
Extr. Rate, 999.9999 (PERCENT)	0.4225	0.4231	0.4225	0.5093	0.4225	0.5455
Beginning Stocks (1000 MT)	6	6	4	3	11	7
Production (1000 MT)	60	44	60	55	60	60
MY Imports (1000 MT)	0	0	0	2	0	0
Total Supply (1000 MT)	66	50	64	60	71	67
MY Exports (1000 MT)	31	25	30	31	25	30
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	31	22	23	22	35	25
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	31	22	23	22	35	25
Ending Stocks (1000 MT)	4	3	11	7	11	12
Total Distribution (1000 MT)	66	50	64	60	71	67
(1000 MT), (PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

PRODUCTION

FAS Abidjan, Accra forecasts Côte d'Ivoire's MY 2025/2026 (January-December) palm kernel oil (PKO) production at 60,000 MT in MY 2025/2026.[9] MY 2024/2025 PKO production is estimated at 55,000 MT, up by 11,000 MT or 25 percent compared to MY 2023/2024; reflecting improved mill operational performance and increased palm kernel availability from more stable crushing activity.

These gains are supported by ongoing equipment upgrades in several industrial plants, better handling and storage practices for palm kernels, and a more consistent supply from mills that have expanded or modernized their processing lines. Nonetheless, PKO production remains structurally constrained by the limited number of mills equipped for palm kernel crushing and by variations in palm kernel supply from small-holder plantations. Some operators are prioritizing the sale of raw palm kernels instead of investing in additional processing capacity, contributing to a ceiling on PKO output despite overall improvements.[10]

[9] Palm kernel oil is derived from the palm kernel, which is the edible seed of the oil palm fruit tree (*Elaeis guineensis*). The fruit yields two oil types: 1) palm oil derived from the outer parts of the fruit and 2) palm kernel oil from the kernel.
[10] So, what is the difference between crude palm oil and palm kernel oil? Essentially two types of oil can be produced; crude palm oil comes from squeezing the fleshy fruit, while palm kernel oil comes from crushing the kernel, or the stone in the middle of the fruit. Palm oil is traditionally used for edible purposes such as cooking, frying, and as a food ingredient. Palm kernel oil will normally be utilized for non-edible purposes such as in the manufacture of soaps, cosmetics, and detergents; however, it is also used in commercial cooking and frying because it remains stable at high cooking temperatures, is lower in

CONSUMPTION

FAS Abidjan, Accra forecasts Côte d'Ivoire's MY 2025/2026 domestic palm kernel oil total domestic consumption at 25,000 MT, up by 3,000 MT or almost 14 percent from the MY 2024/2025 estimate of 22,000 MT. Domestic consumption growth remains moderate, driven primarily by industrial use in sectors such as soaps, detergents, cosmetics, and specialty food applications. As production increases, with consumption expanding at a slower pace, Post forecasts MY 2025/2026 ending stocks at 12,000 MT, up by 5,000 MT and 71 percent from its MY 2024/2025 estimate.

TRADE

Exports: Palm kernel oil is one of Côte d'Ivoire's export-oriented oil palm derivatives. FAS Abidjan, Accra forecasts Côte d'Ivoire's MY 2025/2026 palm kernel oil exports at 30,000 MT, down slightly from its MY 2024/2025 estimate of 31,000 MT by 1,000 MT or 3 percent.

Export markets remain diversified, with Italy, Spain, Mali, Morocco, and Burkina Faso representing the principal destinations for Ivorian PKO. International demand continues to be strong due to the importance of PKO in the production of specialty fats, oleochemicals, and surfactants. As a result, Côte d'Ivoire is expected to maintain similar export volumes over the next two-years, supported by improving processing consistency and competitive pricing.

POLICY

Côte d'Ivoire's palm oil producer sector operates under a clear institutional and regulatory framework. The sector is overseen by the Palm Oil, Rubber and Coconut Council (*Conseil Hevea Palmier à Huile et Cocotier* – CHPHC), that supervises first-stage processing, sets indicative prices for fresh fruit bunches and crude palm oil, and monitors overall market conditions. The Inter-professional Association of the Oil-Palm Industry (*Association Interprofessionnelle de la Filière Palmier à Huile* - AIPH), created by Decree No. 2015-127, brings together all value-chain actors, including small-holder cooperatives and industrial processors.[11] Together, these organizations support a sector covering some 300,000 hectares of oil palm plantations; providing livelihoods for several million Ivorian farmers.

In 2025, the Ivorian government approved a new ten-year development plan for the oil palm sector, with an estimated budget of West African CFA francs (XOF) 245.9 billion ($440 million). The plan focuses on replanting ageing oil palm plantations, improving access to high-yield seedlings, strengthening

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costs, and allows for a longer shelf life than other vegetable oils. Palm kernel oil remains semi-solid at normal room temperature but is more saturated than palm oil and similar to coconut oil.

[11] Decree No. 2015-127, issued on March 4, 2015, officially recognizes the *Association Interprofessionnelle de la Filière Palmier à Huile* (AIPH) as an agricultural interprofessional organization in Côte d'Ivoire. This decree was a critical step in formalizing the co-management of the oil palm industry, allowing the AIPH to legally represent stakeholders in price-setting and sustainability initiatives. Information regarding AIPH's status and regulatory role in the palm oil sector is also maintained by the Palm Oil, Rubber and Coconut Council (*Conseil Hévéa-Palmier à Huile* - CHPH), the government council that oversees the sector's administrative reforms. See, Attachments for Decree No. 2015-127 in French and English; a copy from the *Journal officiel de la Côte d'Ivoire* (official gazette) is retriable at: https://www.juriafrica.com.

technical support for small-holders, and upgrading rural infrastructure to help move fruit more efficiently. These efforts aim to raise productivity, increase the plantation renewal rate, and improve the sector's resilience.

On June 3, 2025, the CHPHC announced that it would suspend the issuance of new authorizations for building or expanding first-stage palm oil processing plants. The decision is being implemented to prevent excess processing capacity, ensure better alignment between fresh fruit bunch supply and industrial demand, and control unfair competition among the sector's operators.

Price controls continue to influence the domestic market. Since December 2020, the Ivorian government has capped the prices of table oil, CPO, and FFB to help stabilize consumer prices and maintain producer income. While these measures protect households and farmers, they have impacted refiners' profit margins, especially as they face stronger competition from low-priced, subsidized Asian olein imports. ECOWAS tariff rules also limit the competitiveness of non-regional imports, reinforcing the role of domestic production.

Environmental compliance and sustainability standards are becoming more important. In 2024, Ivorian authorities increased inspections of palm oil mills, and several facilities were temporarily closed for not meeting environmental requirements. At the same time, national efforts to improve traceability, reduce deforestation risks, and promote better waste and effluent management are underway. These actions are partly driven by new global market expectations, including upcoming requirements linked to the European Union (EU) Deforestation Regulation.[12]

[12] On December 23, 2025, the European Union (EU) published Regulation 2025/2650, which is an amendment to the controversial EU Deforestation Regulation (EUDR). The published amendments officially delay the EUDR's entry into application until December 30, 2026. The amendments also create new definitions that provide simplifications to some, primarily EU, operators, and excludes paper products from the scope of application. The new Regulation also calls on the Commission to publish a simplification review of EUDR by April 30, 2026. See, U.S. Department of Agriculture (USDA) – Foreign Agricultural Service (FAS), "EU Adopts Changes to Deforestation Regulation - | E4202- 0038 |," located at: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=EU%20Adopts%20Changes%20to%20Deforestation%20Regulation%20_Brussels%20USEU_European%20Union_E42025-0038.

COMMODITY:

OILSEED, SOYBEAN

Table 4. Côte d'Ivoire: Commodity, Oilseed, Soybean, Production-Supply-Distribution (PSD)

Oilseed, Soybean	**2023/2024**		**2024/2025**		**2025/2026**	
Market Year Begins	**Oct 2023**		**Oct 2024**		**Oct 2025**	
Cote d'Ivoire	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Area Planted (1000 HA)	0	0	0	0	0	0
Area Harvested (1000 HA)	0	6	0	7	0	8
Beginning Stocks (1000 MT)	0	0	0	1	0	6
Production (1000 MT)	0	6	0	6	0	7
MY Imports (1000 MT)	0	1	0	27	0	25
Total Supply (1000 MT)	0	7	0	34	0	38
MY Exports (1000 MT)	0	5	0	6	0	6
Crush (1000 MT)	0	1	0	20	0	25
Food Use Dom. Cons. (1000 MT)	0	0	0	2	0	2
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	0	1	0	22	0	27
Ending Stocks (1000 MT)	0	1	0	6	0	5
Total Distribution (1000 MT)	0	7	0	34	0	38
Yield (MT/HA)	0	1	0	0.8571	0	0.875
(1000 HA), (1000 MT), (MT/HA)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

PRODUCTION

FAS Abidjan, Accra forecasts Côte d'Ivoire's MY 2025/2026 (October-September) soybean production at 7,000 metric tons (MT), increasing by 1,000 MT or slightly over 16.5 percent from the MY 2024/2025 estimate of 6,000 MT. Côte d'Ivoire currently is producing soybeans on a marginal scale compared to other West African nations. In 2026, the Ivorian government is expected to revitalize the soybean sector to enhance food sovereignty and animal feed security.

Soybeans are primarily cultivated up in Côte d'Ivoire's northern savanna zone. Sources inform that a major production and processing hub is being launched in December 2025, in the Bafing Region (Mahou-Sokourala) in an attempt to boost productive output with the aim of achieving food self-sufficiency in the future. In MY2025/2026, area harvested is forecasted at 8,000 hectares, up by 1,000 hectares from the preceding MY 2024/2025 estimate of 7,000 hectares. This progress is supported by field-level actions being implemented under the Second National Agricultural Investment Program (PNIA II), which aims to reduce (foreign) import dependency and promote alternative cash crops in northern Côte d'Ivoire.[13]

[13] Côte d'Ivoire's Second National Agricultural Investment Program (PNIA II) is the Ivorian government's strategic framework for agricultural development for 2018-2025. The PNIA II program is estimated at West African CFA francs (XOF) 11.9 trillion ($20 billion). The primary objective is to create a more competitive, sustainable, and inclusive agricultural sector to reduce rural poverty. PNIA II aims to move the sector from raw material exports to domestic agro-processing, particularly for cocoa, cashews, and palm oil. See, Alerte Foncier and Programme National d'Investissement

Increased production is benefitting from multiple initiatives, including the distribution of 15 MT of certified seeds and 200 MT of organic fertilizer in Korhogo and surrounding areas. These interventions have targeted Côte d'Ivoire's north and northwestern regions, especially in the vicinities of Touba (Bafing Region), Odienné (Kabadougou Region), and Korhogo (Poro Region), where soybean is promoted as an alternative to cotton and cashew nut production. Despite these efforts, yields remained modest due to continued challenges resulting from limited mechanization, low inoculant use, and technical constraints at the small-holder level.

Future Ivorian revitalization projects, emulating the one in the Bafing Region, will aspire to reach a soybean production goal of 45,000 MT. Côte d'Ivoire is modernizing its soybean value chain aspiring to reduce its dependency on foreign imports. It also seeks to create more local jobs and sustainable animal feeds for its livestock sector. With PNIA II reaching it conclusion in in early 2026, the Ivorian government is transitioning to its National Development Plan 2026-2030 (*Plan National de Développement 2026-2030* – PND). The new plan integrates agricultural goals into a broader strategy geared to driving Côte d'Ivoire to reach upper-middle-income status (by 2030).[14]

CONSUMPTION

FAS Abidjan, Accra forecasts Côte d'Ivoire's MY 2025/2026 soybean total domestic consumption at 27,000 MT, increasing by 2,000 MT or 8 percent from the MY 2024/2025 estimate of 25,000 MT. Growth is driven by increased demand from the animal feed sector, particularly coming from poultry and hog farming operations. Feed manufacturers are known to be gradually incorporating more soymeal into their formulas to boost protein content and reduce reliance on imported feed ingredients.

Although domestic soybean production is still low, its contribution to total supply is slowly improving. Post foretells that the MY 2025/2026 projection of 7,000 MT will cover about a quarter of the total consumption need, compared to less than one-fourth in the previous year. This trend aligns with national efforts to encourage import substitution, particularly through local sourcing by agro-industrial processors.

Most soybeans consumed in Côte d'Ivoire are still imported. These are primarily used for crushing into meal and oil, with very limited direct human consumption. Ivorian soybean imports in MY 2024/2025

Agricole, "*Programme National d'Investissement Agricole de deuxième génération*," located at: https://www.alertefoncier.org/bibliotheque/programme-national-d%E2%80%99investissement-agricole-de-deuxieme-generation-2017-%E2%80%93-2025#:~:text=T%C3%A9l%C3%A9charger%20(3.18%20Mo),le%20MINEF%20et%20le%20MINSEDD1%20). See Attachments for, "Summary: Côte d'Ivoire, National Agricultural Investment Program (PNIA II)," in English.

[14] Côte d'Ivoire's National Development Plan 2026–2030 (*Plan National de Développement 2026-2030* – PND) implementation priorities focus on transforming the nation into an upper-middle-income country by 2030. The plan targets a reduction in the national poverty rate to below 20 percent and an increase in per capita income to roughly $4,000. The Côte d'Ivoire PND counts with six strategic pillars: 1) Peace, Security, and Stability; 2) Agricultural Modernization (includes agro-processing); 3) Private Sector and Industrialization (includes developing regional agro-poles and supporting national champions); 4) Human Capital and Employment; 5) Infrastructure and Ecological Transformation; and 6) Governance and State Modernization. The plan was adopted in principle by the government on January 15, 2025, but the process for its finalization and adoption by the Ivorian Parliament is still underway throughout 2025 and now into 2026. See Attachments for, "Summary, Strategic Plan Côte d'Ivoire 2030."

are estimated at 27,000 MT but forecast to decrease slightly to 25,000 MT in MY 2025/2026; indicative of the early impact of local supply expansion and a strategic shift among buyers toward greater domestic sourcing when available.

TRADE

Exports: In MY 2025/2026, Côte d'Ivoire's soybean exports are forecast at 6,000 MT, largely unchanged from the preceding year. Ivorian soybean exports are channeled primarily to neighboring countries such as Mali and Burkina Faso. These flows include both formal exports and informal trade, particularly from northern production zones. Smaller volumes are also reaching European markets, likely for specific uses or quality-driven contracts.

Export volumes are increasing over time. Rising from MY 2022/2023's 2,100 MT now in MY 2024/2025 to 6,000 MT. This trend indicates that part of the soybean supply, whether imported or domestically produced, is now being channeled toward foreign markets. These sales appear to respond to immediate market opportunities or signals rather than being part of a long-term export strategy.

Imports: FAS Abidjan, Accra forecasts MY 2025/2026 Côte d'Ivoire's imports of soybeans at 25,000 MT, down by 2,000 MT or 7.4 percent from the MY 2024/2025 estimate of 27,000 MT. Côte d'Ivoire remains heavily dependent on foreign-origin imported soybeans to meet local demand. Côte d'Ivoire imports soybeans largely from Brazil and France. Most of these imports are for whole soybeans, mainly processed into soybean meal used in the livestock and poultry sectors. The choice of supplier typically depends on price conditions, availability, and logistics.

COMMODITY:

MEAL, SOYBEAN

Table 5. Côte d'Ivoire: Commodity, Soybean Meal, Production-Supply-Distribution (PSD)

Meal, Soybean	**2023/2024**		**2024/2025**		**2025/2026**	
Market Year Begins	**Oct 2023**		**Oct 2024**		**Oct 2025**	
Cote d'Ivoire	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Crush (1000 MT)	0	1	0	20	0	25
Extr. Rate, 999.9999 (PERCENT)	0	1	0	0.75	0	0.8
Beginning Stocks (1000 MT)	21	21	25	22	33	37
Production (1000 MT)	0	1	0	15	0	20
MY Imports (1000 MT)	184	165	250	180	270	200
Total Supply (1000 MT)	205	187	275	217	303	257
MY Exports (1000 MT)	5	5	12	10	5	5
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	175	160	230	170	265	200
Total Dom. Cons. (1000 MT)	175	160	230	170	265	200
Ending Stocks (1000 MT)	25	22	33	37	33	52
Total Distribution (1000 MT)	205	187	275	217	303	257
(1000 MT), (PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

PRODUCTION

FAS Abidjan, Accra forecasts Côte d'Ivoire's MY 2025/2026 (October-September) soybean meal production at 20,000 MT, up by 5,000 MT or 33 percent over its MY 2024/2025 estimate of 15,000 MT. Post anticipates an increase in soybean meal production resulting from the increase in soybean imports taking off in mid-2025. Greater availability of beans is fueling higher crushing operations in MY 2024/2025. Post's MY 2025/2026 forecast, however, is premised on foreign-origin soybeans availability for import (and processing) given that Ivorian domestic soybean production alone is inadequate to sustain current soybean crush levels.

Growing Ivorian domestic soybean meal production is nonetheless indicative of evolving local market conditions. Post finds that established crushing facilities are adjusting their feedstock mix in response to soybean availability, with imports playing a central role in meeting overall animal feed demand. Noteworthy has been that MY 2024/2025 soybean meal production benefitted from the installation of and activation of crush operations in Côte d'Ivoire's central regions; that is, following years of strategic planning and investment. Nevertheless, in the short-term, soybean meal demand will remain largely met through imports; with local Ivorian production seen as a complementary, and not yet substitutive, source of supply. Still domestic crushing's expansion signals an evolving shift toward partial import substitution possibilities in the coming years; tacking positively with the government's long-term ambition for achieving protein self-sufficiency.

CONSUMPTION

FAS Abidjan, Accra forecasts Côte d’Ivoire’s MY 2025/2026 soybean meal total domestic consumption at 200,000 MT, up by 30,000 MT or almost 18 percent from the MY 2024/2025 estimate of 170,000 MT. Post attributes increased soybean meal consumption to the growing demand from the Ivorian poultry and aquaculture sectors; these remain the primary consumers of soybean meal for feed. Despite fluctuations in maize and cottonseed meal availability, soybean meal remains a preferred protein source due to its digestibility and relatively stable protein content.

The projected increase also aligns with broader trends in the livestock sector, including the gradual modernization of poultry operations and the expansion of industrial feed production units in and around Abidjan, Bouaké, Abengourou, and Korhogo. However, overall growth remains moderate due to constraints such as limited domestic crush capacity, inconsistent supply of whole beans, and price sensitivity among the small-scale livestock operators.

TRADE

Exports: FAS Abidjan, Accra forecast Côte d’Ivoire’s MY 2025/2026 exports of soybean meal at 5,000 MT, down 5,000 MT and 50 percent from the MY 2024/2025 estimate of 10,000 MT. The main export destinations are Mali and Burkina Faso, which together absorbed the majority of the Ivorian export volume. This growth reflects increasing regional demand and the rising capacity of local processing units to supply neighboring countries.

Imports: FAS Abidjan, Accra forecast Côte d’Ivoire’s MY 2025/2026 imports of soybean meal at 200,000 MT, up 20,000 MT or 11 percent from the MY 2024/2025 estimate of 180,000 MT. Post’s estimation is based on updated trade figures, as reported by the Ivorian customs authority. Côte d’Ivoire’s primary suppliers of soybean meal include Argentina and the United States, which combined account for the entirety of Ivorian soybean meal imports in recent years. In MY 2024/2025, Argentina alone accounted for some 220,316 MT, while the United States contributed 28,810 MT. Small volumes have also made their way to Côte d’Ivoire from China and Morocco.

POLICY

In 2025, the Ivorian government stepped up its efforts to develop the soybean sector, marking a significant shift from pilot initiatives to a more ambitious and structured expansion plan. Key public initiatives are focused on preparing large areas of land for cultivation, distributing quality inputs, and supporting the emergence of downstream processing infrastructure.

Throughout 2025, the Ivorian government has undertaken significant efforts to expand cultivated areas, particularly in the country’s northern regions. The government is prioritizing agricultural expansion, with a special emphasis on soybeans to achieve three critical strategic goals of the National Development Plan 2026-2030: 1) reduce dependency on imported animal feed (includes reaching 65 percent self-sufficiency of domestic demand); 2) regional economic rebalancing and security (includes developing the north to reduce regional inequalities and enhance national stability/social cohesion and security in areas bordering the Sahel); and 3) leverage climate-resistant production (includes taking advantage of advances in photoperiodism benefitting new soybean varieties that thrive in Africa's tropical conditions).

These efforts are closely tied to the operationalization of a major soybean processing plant, which created new incentives to rapidly increase local supply capacity. Authorities have also expanded support to emerging production zones beyond traditional growing areas, with northern and central-northern districts receiving new resources and technical assistance.

In addition to land preparation, 2025 saw the implementation of large-scale distribution programs for certified seeds and bio-fertilizers. These campaigns, carried out in partnership with regional institutions and the private sector, aimed to reinforce farmer access to key inputs and improve technical practices on the ground.

Strategic financing instruments are also being deployed, notably through a new agro-industrial development program supported by international development partners. This initiative targets improved mechanization, rural credit access, and support for small-scale processing infrastructure, helping to link primary production to industrial demand.

Producer groups have mobilized to form the Inter-professional Agricultural Organization for Soybeans (*Organisation Interprofessional Agricultural du Soja* – OIA Soja).[15] This is a national-level platform that advocates better price mechanisms and more structured market access. While Côte d'Ivoire does not yet have a guaranteed minimum price for soybeans, policy dialogue is intensifying, with growing government support for collective pricing frameworks.

These measures are indicative of a new phase of scale-up, transitioning from fragmented efforts to a more coordinated national approach. Post assesses that the overarching goal is to reduce reliance on foreign-origin imports for livestock feed; while at the same time supporting rural livelihoods through a more resilient, structured soybean value chain.

Attachments:

CDI - Decree No 2015-127 March 4 2015 AIO of Oil Palm Sector.pdf

CDI - National Agricultural Investment Prgram (2017-2025) (PNIA II) Summary.pdf

CDI - Summary Cote d'Ivoire Strategic Plan 2030.pdf

[15] The platform is part of a broader government effort to structure agricultural value chains into "*Organisations Interprofessionnelles Agricoles* - (OIA)." These organizations are designed to bring together three core "colleges" of actors: producers, processors, and traders/distributors. See, Chambres d'Agriculture de Côte d'Ivoire, "*Les Interprofessions, Definitions*," located at: https://www.chambragri.ci/en/page/2025-05/les-interprofessions#:~:text=LES%20INTERPROFESSIONS%20%7C%20La%20Chambre%20d'Agriculture%20de%20C%C3%B4te%20d'Ivoire.