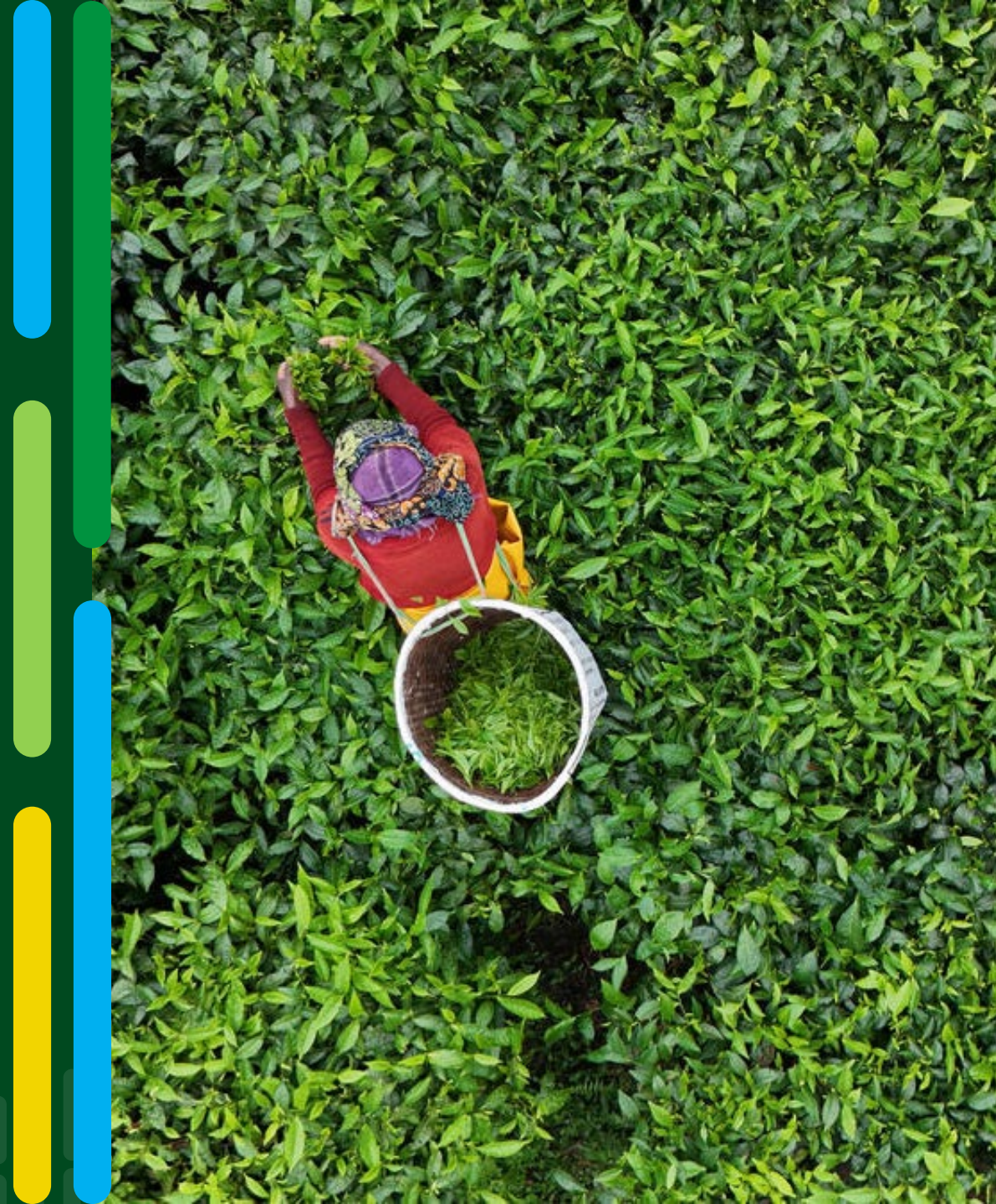




Rwanda

TRANSFORMING HIGH-VALUE AGRIFOOD
VALUE CHAINS TO CREATE JOBS,
INCREASE EXPORTS, AND IMPROVE
RURAL LIVELIHOODS

HAND-IN-HAND INVESTMENT FORUM
ROME, OCTOBER 2026



What defines Rwanda's agrifood system?

1.5M ha

Agricultural land

9.4% GDP

Growth in 2025

20% GDP

Agricultural contribution

37%

Agricultural exports

MILLIONS OF SMALLHOLDER FARMERS ARE DRIVING RWANDA'S AGRIFOOD SYSTEM. ON LIMITED LAND, THEY PRODUCE HIGH-VALUE CROPS AND LIVESTOCK THAT FEED THE NATION, DRIVE EXPORTS, AND SUSTAIN RURAL LIVELIHOODS.

From **tea** and **coffee** grown in the country's fertile highlands to **Irish potatoes**, **horticulture**, **pigs**, and **poultry**, Rwanda's agrifood system is increasingly market-oriented and supported by strong government coordination.

Yet, much of this production is still exported with **limited value addition**, leaving significant opportunities to increase productivity, create jobs, and generate greater returns for farmers and investors alike.



What is preventing Rwanda from capturing more value?

HIGH-VALUE CROPS,
UNTAPPED VALUE.

01 Export-oriented value chains still rely on limited processing

- 98.3% of tea exported as raw black tea; major value addition opportunity
- Average 99% of coffee exported as green (unroasted)
- Limited domestic value addition

02 Producers continue to face productivity bottlenecks

- Low tea yields, underutilized land and aging coffee plantations
- Insufficient storage, processing and logistics infrastructure
- ~25% post-harvest loss of Irish potatoes due to inadequate storage
- Limited protected agriculture for chili

03 Livestock producers face production and processing constraints

- Inadequate hatchery capacity
- Limited animal health services and high animal feed costs
- Insufficient processing and slaughterhouse infrastructure

What could change?

FIVE INVESTMENT OPPORTUNITIES FOR USD 414.8 MILLION: FROM PRIMARY PRODUCTION TO HIGH-VALUE AGRIBUSINESS

01 Tea Production & Processing

Expand tea production through new plantations, improved seedlings, processing facilities, value addition, and research on climate-resilient varieties

USD 92.8M
Investment

20.2%
IRR

02 Coffee Production & Processing

Expand coffee production, strengthen processing and value addition, and improve market access through digital traceability and certification

USD 45.9M
Investment

22.8%
IRR

03 Irish Potato Production

Strengthen seed systems, expand climate-smart production, and reduce post-harvest losses through improved storage infrastructure

USD 33.8M
Investment

29.2%
IRR

04 Pig & Poultry Production

Scale pig and poultry production through improved hatcheries, integrated animal support services, feed processing, and modern slaughterhouses

USD 169.8M
Investment

27.0%
IRR

05 Avocado & Chili Production

Scale high-value export crops through certified production, protected agriculture, and improved logistics

USD 72.5M
Investment

18.5%
IRR

Why is Rwanda an attractive place to invest?

KEY POLICIES AND PARTNERSHIPS SUPPORTING AGRIFOOD INVESTMENT

Vision 2050 and NST2

Strong government coordination

USD 819 million

Foreign Direct Investment in 2024

USD 110+ million

Total investment secured

Access to markets

Through AfCFTA, EAC (300M consumers) and COMESA (640M consumers).

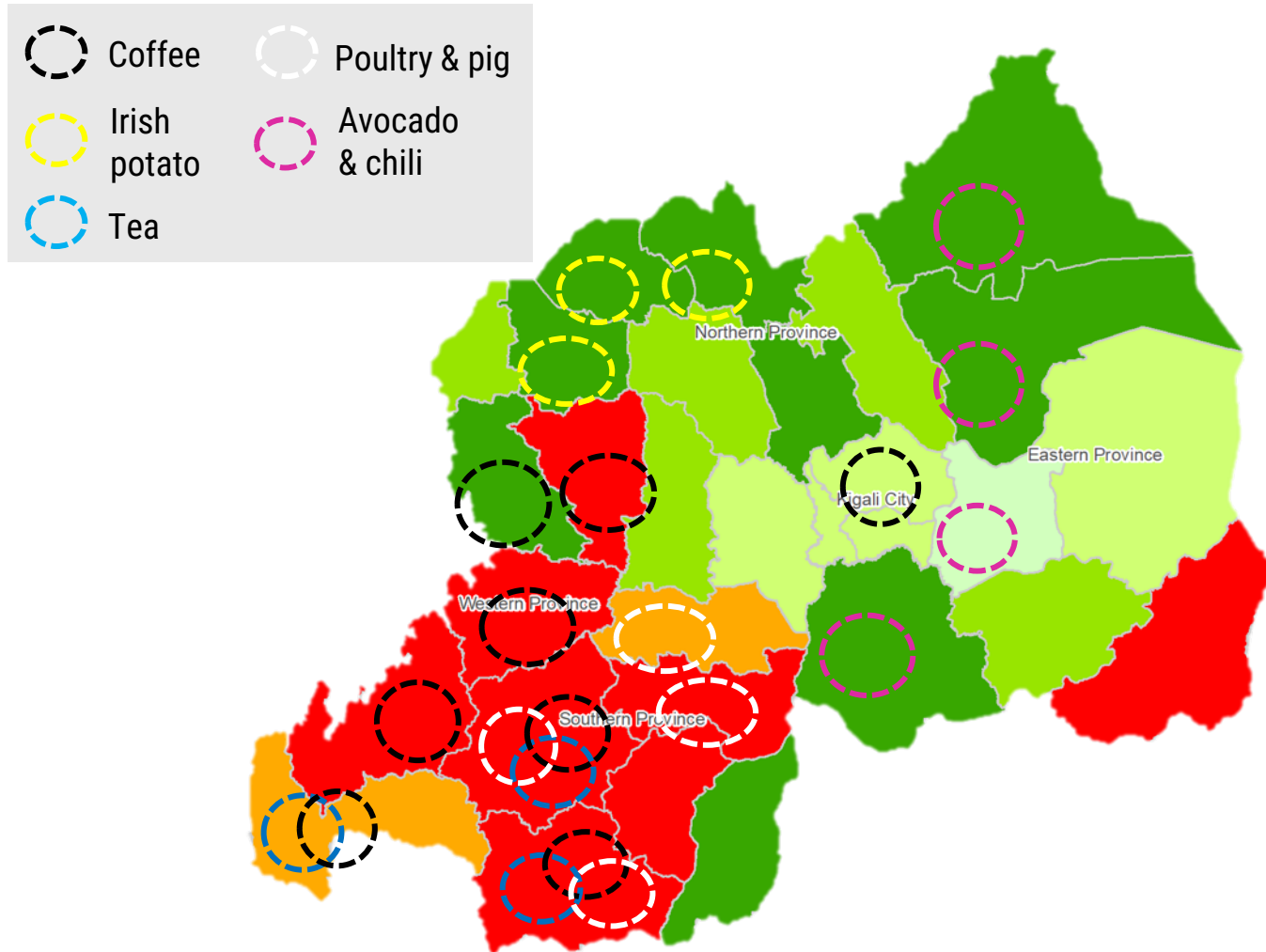
Attractive incentives

Fiscal and non-fiscal

USD 59.5 million

IFAD secured loan secured

How do we know where to target these investments?



FAO'S GEOSPATIAL PLATFORM HELPS IDENTIFY AREAS WHERE AGRICULTURAL POTENTIAL IS GREATEST.

INVESTMENTS ARE TARGETED TO ADDRESS THE SPECIFIC CHALLENGES OF EACH TERRITORY, MAXIMIZING IMPACT.

- Critical with moderate agricultural opportunities
- Medium priority with moderate agricultural opportunities
- Low priority
- High priority
- Medium priority with high agricultural opportunities
- Low priority with high agricultural opportunities
- High performance



How can these investments transform Rwanda's rural economy?

BUILDING MORE COMPETITIVE VALUE CHAINS,
CREATING BETTER JOBS, AND INCREASING
RURAL INCOMES

Tea Production & Processing

Direct beneficiaries

85,000

Indirect beneficiaries

195,831

Per capita income increase

USD 1,065

Coffee Production & Processing

Direct beneficiaries

450,000

Indirect beneficiaries

200,000

Per capita income increase

USD 1,065

Irish Potato Production

Direct beneficiaries

41,772

Indirect beneficiaries

245,341

Per capita income increase

USD 570



Pig & Poultry Production

Direct beneficiaries

192,953

Indirect beneficiaries

710,304

Per capita income increase

USD 928

Avocado & Chili Production

Direct beneficiaries

37,190

Indirect beneficiaries

87,880

Per capita income increase

USD 850

How can you be part of this story?

THREE SIMPLE STEPS

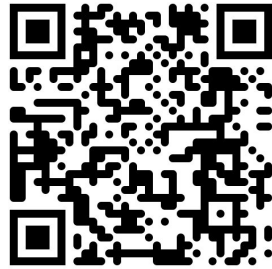
01 Explore the Investment Note

Download the **full investment note** or **investor deck** from the country page:



Access the most relevant document to you for more details on the country's investment cases.

02 Request a Bilateral Meeting



Schedule a one-on-one session with the country's delegation to discuss opportunities.



03 Join as an Investor/Partner



Engage with us as a DFI, MDB, or private investor to structure, derisk, and deploy capital.