CHAPTER 9

Tracking Key CAADP Indicators and Implementation Processes

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Introduction

Agriculture is a vital source of livelihoods for more than 60 percent of Africa's population. Recognizing the need to boost investments and productivity in the sector, in 2003, African leaders adopted the Comprehensive Africa Agriculture Development Programme (CAADP) as the policy framework for revitalizing agriculture and reducing poverty and food insecurity on the African continent. Following a decade of implementing CAADP, the framework gained momentum in 2014, when African heads of state and government adopted the Malabo Declaration on *Accelerated Agricultural Growth and Transformation for Shared Prosperity and Improved Livelihoods*. Through the Declaration, they recommitted to upholding CAADP principles and values, which include adopting evidence-based planning, policy efficiency, dialogue, review, and accountability and exploiting regional complementarities. They also pledged to increase investment in agriculture, end hunger and halve poverty by 2025, boost intra-African agricultural trade, enhance resilience to climate variability, and strengthen mutual accountability for actions and results by conducting a continental Biennial Review (BR) of progress made in achieving the commitments (AUC 2014).

The Regional Strategic Analysis and Knowledge Support System (ReSAKSS) was established in 2006 to support the successful implementation of CAADP by providing policy-relevant data; facilitating dialogue among stakeholders; monitoring progress toward achieving goals and targets; and strengthening mutual accountability processes at the continental, regional, and national levels.[1] Starting in 2007 and at the behest of the African Union Commission (AUC), ReSAKSS led the development of the first CAADP monitoring and evaluation (M&E) framework for assessing CAADP implementation progress and performance (Benin, Johnson, and Omilola 2010). Between 2008 and 2014, ReSAKSS used the M&E framework to track CAADP implementation processes and indicators that were initially focused on allocating 10 percent of national budgets to the agriculture sector and achieving a 6 percent agricultural growth rate at the national level. As the Malabo Declaration had broadened the CAADP agenda by adding new commitment areas, AUC and the African Union Development Agency–New Partnership for Africa's Development (AUDA-NEPAD) developed a new CAADP Results Framework (RF) for 2015–2025 for measuring progress in CAADP implementation, including progress toward meeting the Malabo commitments (AUC and NPCA 2015).

To report on the provisions of the Malabo Declaration, the CAADP RF is organized on three levels: Level 1 outcomes, Level 2 outputs, and Level 3 inputs.

- Level 1 of the CAADP RF includes broader development outcomes and impacts to which agriculture contributes, including wealth creation; food and nutrition security; enhanced economic opportunities, poverty alleviation, and shared prosperity; and resilience and sustainability.
- Level 2 includes the outputs from interventions intended to transform the agriculture sector and achieve inclusive growth: improved agricultural production and productivity; increased intra-African trade and functional markets; expanded local agro-industry and value chain development, inclusive of women and youth; increased resilience of livelihoods and improved management of risks in agriculture; and improved management of natural resources for sustainable agriculture.
- Level 3 includes inputs and processes required to strengthen systemic capacity to deliver CAADP results and create an enabling environment in which agricultural transformation can take place: effective and inclusive policy processes; effective and accountable institutions that regularly assess the quality of implementation of policies and commitments; strengthened capacity for evidence-based planning, implementation, and review; improved multisectoral coordination, partnerships, and mutual accountability in sectors related to agriculture; increased public and private investments in agriculture; and increased capacity to generate, analyze, and use data, information, knowledge, and innovations.

There are 38 indicators in the CAADP RF: 14 for level 1, 12 for level 2, and 12 for level 3 (Table 9.1). ReSAKSS tracks progress on CAADP indicators in the CAADP RF for 2015–2025 through its flagship Annual Trends and Outlook Report (ATOR) and website (www.resakss.org).

1 ReSAKSS is facilitated by AKADEMIYA2063 and works closely with CAADP stakeholders across the continent. The ReSAKSS activities discussed in this chapter were carried out in collaboration with partners such as the African Union Commission, the African Union Development Agency–New Partnership for Africa's Development (AUDA-NEPAD), regional economic communities, national governments, farmer organizations, members of the African and international research communities, and development partners.

TABLE 9.1—NUMBER OF INDICATORS IN THE CAADP RESULTS FRAMEWORK AND BIENNIAL REVIEW

CAADP Results Framework	Number of indicators
Level 1: Agriculture's contribution to economic growth and inclusive development	14
Level 2: Agricultural transformation and inclusive growth	12
Level 3: Systemic capacity to deliver results	12
Total number of indicators	**38**
CAADP Biennial Review and Africa Agriculture Transformation Scorecard	**Number of indicators**
Commitment 1: CAADP processes and values	3
Commitment 2: Investment finance in agriculture	6
Commitment 3: Ending hunger by 2025	21
Commitment4: Halving poverty by 2025	8
Commitment 5: Boosting intra-African trade in agricultural commodities and services	3
Commitment 6: Enhancing resilience to climate variability	3
Commitment 7: Mutual accountability for results and actions	3
Total number of indicators	**47**

Source: Authors based on AUC and NPCA 2015 and AUC 2014.

While the CAADP RF is intended to help track progress in implementing the Malabo Declaration, the CAADP BR process initiated in 2015 introduced additional indicators specifically aimed at monitoring all of the seven Malabo commitments using the Africa Agriculture Transformation Scorecard (AATS). About 24 of the CAADP BR indicators were drawn from the CAADP RF while additional new indicators were added, resulting in a total of 47 BR indicators compared to 38 RF indicators (Table 9.1).

The BR is the paramount continentwide mutual accountability process in the agriculture sector, allowing AU member states to collectively review progress toward the Malabo goals and commitments. However, the CAADP RF is an important complement to the BR process as its indicators provide context for BR results and its coverage enables a range of analyses across the continent and over time. This chapter reviews progress on CAADP indicators using the CAADP RF because the RF data assembled by ReSAKSS are consistently available for a larger number of countries and for longer time periods than the BR data, including both pre- and post-CAADP eras (1995–2003 and 2003–2021). This in turn allows for aggregation across countries and an examination of trends over time periods and across different country groupings (for example, organized by economic categories, regional economic communities, and stage of CAADP implementation) that are not considered by the BR. While the CAADP BR indicators are broader in coverage, there is considerable overlap between these indicators and those in the CAADP RF. Currently, ReSAKSS tracks progress on 18 CAADP BR indicators that overlap with the CAADP RF indicators it tracks (Table 9.2).

The six other overlapping indicators between the CAADP RF and the CAADP BR are not yet included in the ReSAKSS database because the data are not available at all or are not available across all countries to allow for cross-country aggregation. These include indicators on postharvest loss, women's and children's dietary adequacy, resilience, sustainable land management, and capacity of statistical systems. Additional data gaps in other areas covered in the CAADP RF, including those on social protection and private sector investment, mean that currently only 27 of the 38 CAADP RF indicators can be tracked (Table 9.2). Although discussions on filling data gaps are underway among CAADP technical partners, increasing the availability of data in these areas can be challenging and will require resolute efforts by countries and their partners to develop and fund comprehensive data collection activities.

Objectives of the Chapter

With the ATOR as the official CAADP M&E report, this chapter reviews Africa's progress in implementing CAADP processes and progress on the CAADP RF indicators to highlight areas of strong performance that need to be sustained or accelerated as well as areas of weak performance that require urgent attention to enable the continent to meet its Malabo Declaration agricultural transformation goals. In particular, the chapter discusses progress in the CAADP implementation processes and on 27 of the 38 CAADP RF indicators for which cross-country data are available (Table 9.2). Details of the indicators and aggregate statistics are available in the data tables in Annexes 1–3 of this report. Progress on the RF indicators is discussed across different aggregated geographic and economic

TABLE 9.2—CAADP RESULTS FRAMEWORK INDICATORS DISCUSSED
LEVEL 1: Agriculture's Contribution to Economic Growth and Inclusive Development
1. L1.1.1 GDP per capita (constant 2015 US$)
2. L1.1.2 Household final consumption expenditure per capita (constant 2015 US$)
3. L1.2.1 Prevalence of undernourishment (% of population)
4. L1.2.2a Prevalence of underweight, weight for age (% of children under 5)
5. L1.2.2b Prevalence of stunting, height for age (% of children under 5)
6. L1.2.2c Prevalence of wasting, weight for height (% of children under 5)
7. L1.2.3 Cereal import dependency index
8. L1.3.1 Employment rate
9. L1.3.3 Poverty gap at $1.90 a day (2011 PPP)
10. L1.3.4 Extreme poverty headcount ratio at $1.90 a day (2011 PPP), % of population
LEVEL 2 Agricultural Transformation and Sustained Inclusive Agricultural Growth
11. L2.1.1 Agriculture value added (million, constant 2015 US$)
12. L2.1.2 Agriculture Production Index (2004-2006 = 100)
13. L2.1.3 Agriculture value added per agricultural worker (constant 2015 US$)
14. L2.1.4 Agriculture value added per hectare of agricultural land (constant 2015 US$)
15. L2.1.5 Yield for the five most important agricultural commodities
16. L2.2.1 Value of intra-African agricultural trade (constant 2015 US$, million)
17. L2.4.2 Existence of food reserves, local purchases for relief programs, early warning systems, and school feeding programs
LEVEL 3 Strengthening Systemic Capacity to Deliver Results
18. L3.1.1 Existence of a new NAIP/NAFSIP developed through an inclusive and participatory process
19. L3.2.1 Existence of inclusive institutionalized mechanisms for mutual accountability and peer review
20. L3.3.1 Existence of and quality in the implementation of evidence-informed policies and corresponding human resources
21. L3.4.1 Existence of a functional multisectoral and multistakeholder coordination body
22. L3.4.2 Cumulative number of agriculture-related public-private partnerships (PPPs) that are successfully undertaken
23. L3.4.3 Cumulative value of investments in the PPPs
24. L3.5.1 Government agriculture expenditure (billion, constant 2015 US$)
25. L3.5.2 Government agriculture expenditure (% of total government expenditure)
26. L3.5.3 Government agriculture expenditure (% of agriculture value added)
27. L3.6.2 Existence of an operational country SAKSS
Source: AUC and NPCA (2015).
Note: GDP = gross domestic product; NAFSIP = national agriculture and food security investment plan; NAIP = national agriculture investment plan; PPP = purchasing power parity; SAKSS = Strategic Analysis and Knowledge Support System. Highlighted indicators are also BR indicators.

groupings of African countries by comparing trends in the RF indicators during the first five years after the adoption of CAADP (2003–2008) with later subperiods (2008–2014 and 2014–2021).

Before reviewing trends in the 27 CAADP RF indicators, in the next section, the chapter will discuss progress made in the CAADP implementation process in terms of country and regional-level progress in developing evidence-based, Malabo-compliant national agriculture investment plans (NAIPs) and operationalizing CAADP mutual accountability processes to support agriculture sector review and dialogue through agriculture Joint Sector Reviews (JSRs) and the CAADP BR. The CAADP implementation process is led by AUC and AUDA-NEPAD working in collaboration with national governments, regional economic communities (RECs), non-state actors, and development and technical partners. The section describes general progress in the implementation process while highlighting the contribution of ReSAKSS as a technical partner.

Progress in CAADP Implementation Processes

Implementation Support

As the continent continues to battle a combination and succession of crises since the COVID-19 pandemic, attention has been heightened about the urgency of accelerating implementation of priority actions and strengthening implementation capabilities and delivery for both immediate and medium-long term transformative results in agriculture across Africa. The Malabo NAIP domestication is a sequential process led by AUC, AUDA-NEPAD, and regional economic communities (RECs). It includes a convening by national CAADP

constituencies to discuss and agree on a country roadmap to review and formulate a new NAIP when necessary. In general, the roadmap spells out specific roles for all the parties involved, timelines, and coordination modalities needed to review existing NAIPs and generate new NAIPs. However, except for country engagement to prepare for the 2021 United Nations Food Systems Summit (UNFSS), there has not been any significant progress registered toward Malabo domestication during the past year. During the review period, no African Union institution reported having conducted an Independent Technical Review (ITR) to improve the quality of any NAIP formulated by a member state. To date, only 25 out 55 member states of the African Union have gone through the full Malabo domestication process. A total of 42 countries had drafted, reviewed, or validated a Malabo-compliant NAIP by the end of September 2022 (Table L3(a)).

Implementation support for the NAIP domestication process at regional and country levels has been constrained by a number of factors. A stocktaking exercise on lessons learned from NAIP implementation held in mid-2022 by AUDA-NEPAD and AUC suggested that, while NAIPs are generally well aligned to provide direction for the required actions, clarity on how to ensure implementation is often missing (AUDA-NEPAD 2022). Thus, one shortcoming in many cases is the lack of an appropriate set of instruments needed to support implementation by rationalizing the use of limited available resources (time, financial resources, and human capital). The end of the Multi-Donor Trust Fund in 2015, a funding mechanism administered by the World Bank which supported CAADP implementation, has limited the capacity of the African Union institutions to continue to play their much-needed facilitation role for strengthening national and regional CAADP processes. In addition to resource constraints, other challenges hampering the implementation of NAIPs include: (1) technical capacity constraints, translating into insufficient capacity for policy and economic analysis and for reporting and evaluating NAIPs; (2) inadequate and ineffective resource mobilization efforts, insufficient capacities to tap into global development funds, and insufficient private sector partnerships and involvement; (3) limited agribusiness development skills; and (4) other constraints, including limited capacity for M&E, poor harmonization of policies, low dissemination of research, and lack of effective multisectoral coordination of NAIP implementation. In the remaining years before 2025, the AUC, AUDA-NEPAD, and technical partners including ReSAKSS will work to identify avenues to address these constraints in order to strengthen NAIP implementation and inform the development of the next generation of post-Malabo NAIPs.

Biennial Review

The CAADP BR is a process for promoting mutual accountability by reviewing country performance in progressing toward meeting Malabo Declaration commitments by 2025. Africa successfully held three BRs in 2017, 2019, and 2021. Along with other technical partners, ReSAKSS supports the BR process by contributing to technical improvements of BR technical guidelines and tools, including the digital eBR data entry platform and the BR country reporting profile; training country and regional BR teams on the guidelines and tools; and supporting countries and RECs with data analysis, reporting, cleaning, and validation. During the third BR cycle of 2021, ReSAKSS also provided targeted technical and backstopping support to 10 countries (Benin, Botswana, Burkina Faso, Kenya, Mozambique, Malawi, Senegal, Togo, Uganda, and Zimbabwe) with the goal of improving the accuracy, consistency, traceability, and validation of BR data in these countries.

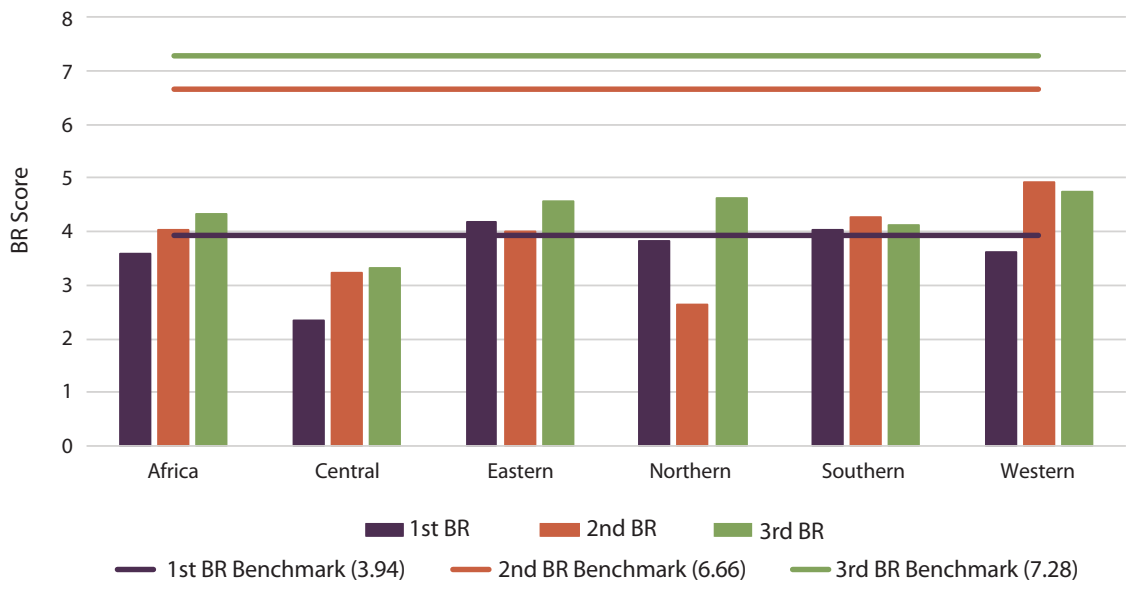
The third BR report, entitled "Accelerating CAADP Implementation for a Resilient African Food System," was released after two difficult years for African agriculture during which the COVID-19 pandemic ravaged health systems, depressed agricultural production, and disrupted market systems, with smallholder producers and SMEs, most of them run by women and youth, bearing the brunt of COVID-19 (AUC and AUDA-NEPAD 2022a). The report is timely as it comes midway through the implementation of the Malabo commitments and goals to be achieved by 2025. It also comes shortly after the yearlong UNFSS process of 2021 that focused attention on food systems.

The third BR report was endorsed by the African Union at the 35th Ordinary Session of the Assembly of the African Union Heads of State and Government in February 2022 in Addis-Ababa. The BR report is a fundamental instrument to help account for the outcomes of different agricultural efforts and interventions on the continent. It enables countries to track, measure, and report progress achieved against agreed result areas. In the third BR report, countries are considered "on-track" if their total score is equal to or higher than the benchmark of 7.28 out of 10; "progressing well" when their score is at least 5.00 but less than 7.28 out of 10; or "not-on-track" if their score is less than 5.00 out of 10 (AUC

2022). The report found that only Rwanda is on-track to meet the Malabo goals and targets by 2025, while 19 countries are classified as progressing well. With an overall average score of 4.32, the continent clearly is not-on-track to meet the Malabo goals and targets by 2025 (Figure 9.1). The report shows that only four countries invested at least 10 percent of their national annual public budget in agriculture, and only one country is on track to meet the goal of ending hunger by 2025. As shown by both empirical observations and the research findings presented in the report, the COVID-19 pandemic and its impacts on agriculture and food security on the continent partly explain the recent low performance of the continent in making progress to meet the Malabo goals and targets by 2025.

Although progress was insufficient to be considered on track to achieving the Malabo commitments, the continent as a whole and three out of five geographic regions increased their scores compared to the first (2017) and second (2019) BR processes (Figure 9.1). In addition, countries' capacities to collect and report data for the BR have improved. A total of 51 countries submitted BR data during the 2021 BR cycle compared to 47 during the 2017 BR and 49 during the 2019 BR (Table L3(c)). In addition, in the 10 countries that received targeted training and backstopping support from ReSAKSS, BR reporting rates were higher compared to non-targeted countries (AKADEMIYA2063 2022). Further assessment is needed to identify the top priority areas for further technical support to enable countries to strengthen their data systems and improve future reporting.

FIGURE 9.1—AFRICA'S PERFORMANCE IN THE 2017, 2019, AND 2021 BRS (AVERAGE AGRICULTURAL TRANSFORMATION SCORE)



Source: Authors' compilation based on AUC (2018), AUC (2020), and AUC (2022).

Joint Sector Reviews

As part of the broader commitment to mutual accountability under the Malabo Declaration, the agriculture Joint Sector Review (JSR) in individual countries provides an inclusive, evidence-based platform for multiple stakeholders in the agriculture sector to jointly review progress; hold each other accountable for actions, results, and commitments; and, based on gaps identified, agree on future implementation actions. As such, JSR platforms are key potential users of BR data as well as opportunities for organizing the collection of BR data and vice versa. Thus, JSRs play an essential role in promoting mutual accountability. They should be introduced where they have not yet been set up and strengthened where they exist. The ultimate step should be integration of the JSR and the BR platforms to consolidate a more cohesive and efficient mutual accountability mechanism in individual countries.

A framework to guide mutual accountability processes under CAADP was developed in 2011 which identified JSRs as a tool for operationalizing the framework. Countries introduced JSR processes to track the implementation of their NAIPs (Matchaya et al. 2022). Over 30 countries have implemented a JSR or a JSR-like process since 2015 (Ulimwengu et al. 2020). At the request of AUC and AUDA-NEPAD, ReSAKSS has been strengthening agriculture JSRs since 2014 by conducting assessments of JSR or JSR-like processes to identify actions that would improve their effectiveness. These

JSR assessments have been conducted or initiated in 21 countries and 2 regional economic communities to date (Table L3(a)).

ReSAKSS has catalogued a set of JSR best practices that promote the creation of an effective, inclusive, and technically robust platform to (1) assess the performance of the agriculture sector; (2) assist governments in setting sector policy and priorities; and (3) assess how well state and non-state actors have implemented pledges and commitments laid out in NAIPs and other agreements (ReSAKSS 2014). However, countries have flexibility to implement JSRs in the way that best fits their needs. For example, while JSRs are annual activities in many countries, Rwanda traditionally holds JSRs twice a year, with one backward-looking session dedicated to reviewing past progress and one forward-looking session on future priorities. JSRs provide an opportunity to assess both agricultural sector performance and the status of institutions and coordination mechanisms for agricultural sector stakeholders. For example, Kenya's 2021 JSR process report (Kenya 2022) noted improved coordination between the national and county governments through the Joint Agriculture Sector Coordination and Cooperation Mechanism. This has been cascaded to the county governments through the establishment of the County Agriculture Sector Steering Committees. ReSAKSS provided technical support throughout the process in Kenya and will continue to assist with follow-up activities, including developing an action plan to support the implementation of the recommendations.

As the third BR report examined ways to improve the BR process and country data capacities, there was a clear call to synergize the processes of the BR, NAIPs, and JSRs that have been running in parallel within most member states.

Progress on CAADP Indicators

This section discusses Africa's performance on 27 of the 38 CAADP RF indicators for which data are available, organized by the three RF levels.[2] Data on the 27 indicators are presented in Annexes 1–3. Progress on the quantitative indicators is presented at the aggregate level for seven different breakdowns:

1. Africa as a whole
2. AU's five geographic regions—central, eastern, northern, southern, and western
3. Five economic categories—countries with less favorable agricultural conditions, countries with more favorable agricultural conditions, mineral-rich countries, lower middle-income countries, and upper middle-income countries[3]
4. Eight regional economic communities (REC)—Community of Sahel-Saharan States (CEN-SAD), Common Market for Eastern and Southern Africa (COMESA), East African Community (EAC), Economic Community of Central African States (ECCAS), Economic Community of West African States (ECOWAS), Intergovernmental Authority on Development (IGAD), Southern African Development Community (SADC), and Arab Maghreb Union (UMA)
5. By the period during which countries signed the CAADP compact—CC0, CC1, CC2, and CC3[4]
6. By the level or stage of CAADP implementation reached by the end of 2015—CL0, CL1, CL2, CL3, and CL4[5]

2 Several of these indicators are also part of the CAADP BR and the Africa Agriculture Transformation Scorecard (AATS).

3 The five economic categories are exclusive. See Benin et al. (2010) for a description of the categorization methodology and criteria for classifying countries based on income, favorability of agricultural conditions and mineral wealth.

4 CC0 = group of countries that have not yet signed a CAADP compact; CC1 = group of countries that signed the compact in 2007–2009; CC2 = group of countries that signed the compact in 2010–2012; CC3 = group of countries that signed the compact in 2013–2015.

5 CL0 = group of countries that have not started the CAADP process or have not yet signed a compact; CL1 = group of countries that have signed a CAADP compact; CL2 = group of countries that have signed a compact and formulated a NAIP; CL3 = group of countries that have signed a compact, formulated a NAIP, and secured one external funding source; CL4 = group of countries that have signed a compact, formulated a NAIP, and secured more than one external funding source. Obtaining funding for NAIPs is a key step in CAADP implementation, and countries that have secured external funding sources are expected to be better able to implement NAIPs and other agricultural investments (Benin 2016).

7. By the distribution of countries in formulating first- and second-generation NAIPs—N00, N10, N01, and N11[6]

Annex 4 lists countries in the various geographic, economic, and REC categories; Annex 5 lists the countries in the different groupings for CAADP compact signing or level of implementation reached; and Annex 6 lists countries by NAIP formulation category. Complete information for all categories is provided in the Annexes 1–3; the discussion in the text here focuses on progress among different geographic groupings, economic categories, RECs, and NAIP categories. Progress is reported over different subperiods, with achievement in the early CAADP subperiod of 2003–2008 compared with achievements in the later subperiods of 2008–2014 and 2014–2021.[7] For all indicators, changes over periods are reported in terms of annual average percent change.

The discussion of trends and changes in CAADP indicators pertains to country categories or groupings as a whole and not individual countries within the categories—for example, it relates to Africa as a whole, central Africa as a group, ECOWAS members as a group, and groups of countries categorized by their stage of NAIP formulation experience. Presenting the trends by different groups helps to determine how the implications for strengthening or maintaining desirable outcomes or for reversing undesirable outcomes may differ across the continent, without inference of causality. Unless otherwise stated, all monetary values have been converted into constant 2015 US dollar prices for intertemporal and cross-country or cross-category comparisons.

CAADP Results Framework Level 1 Indicators: Agriculture's Contribution to Economic Growth and Inclusive Development

Wealth Creation

Economic growth in Africa showed an upswing in 2021 following a sharp contraction in 2020 due to the COVID-19 pandemic. Africa's GDP per capita increased by 2.6 percent in real terms from 2020 to 2021 (Figure 9.2, Table L.1.1.1). Among geographic regions, growth in 2021 was the highest in northern Africa, at nearly 4 percent, and lowest in central Africa, where GDP per capita continued to contract. Growth in 2021 was also especially strong in upper middle-income countries and countries that have developed a second but not a first NAIP (N01 countries), at 6.1 and 4.0 percent, respectively, while average incomes in mineral-rich countries continued to decline. The future trajectory of Africa's post-COVID-19 recovery remains uncertain, and the Russia-Ukraine conflict, which began in early 2022, has ushered in a period of high inflation that is expected to result in decelerating growth in 2022 (AfDB 2022).

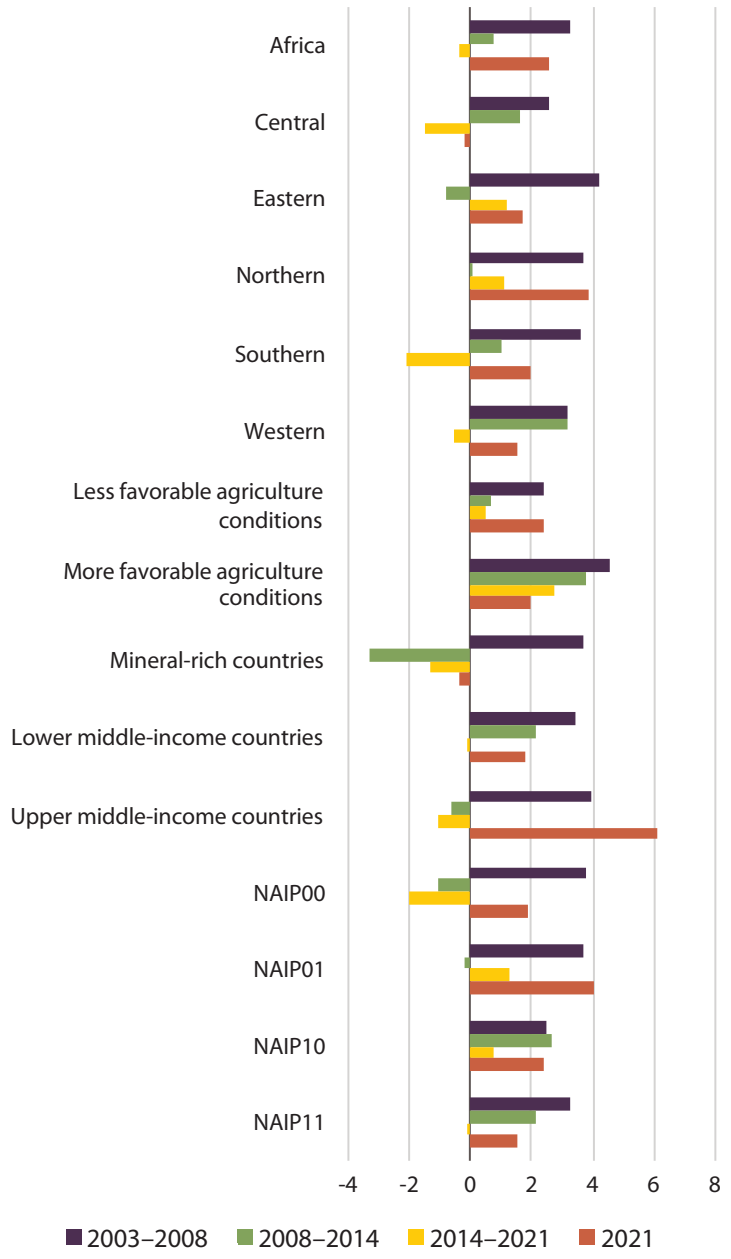
Apart from the impacts of recent crises, economic growth had already been slowing in Africa prior to the pandemic. Generally low growth since 2014 combined with the decline in 2020 means that the average annual rate of growth over the 2014–2021 period was negative for Africa as a whole, at −0.3 percent, and for many of the country groupings. This represents a departure from robust growth rates in the past: GDP per capita increased by an annual rate of 3.2 percent during the 2003–2008 period and slowed to 0.7 percent during 2008–2014 before turning negative during 2014–2021. The pattern of decelerating and recently negative growth is also observed in the central, southern, and western Africa country groupings. In eastern and northern Africa, however, growth was lowest during the 2008–2014 period and accelerated thereafter.

Africa's GDP per capita increased from an average of $1,778 during the 2003–2008 period to $1,963 during the 2008–2014 period and $1,998 during 2014–2021 (Table L1.1.1). Due to the lost ground in 2020, GDP per capita stood at $1,952 in 2021, close to the level of the prior decade. There is wide variation in average incomes across country groupings: GDP per capita in 2021 was $3,875 in northern Africa, nearly twice the average for Africa as a whole, while central Africa's average, $836, was less than half the continental average. Lower-income countries with less favorable agricultural conditions, EAC countries, and countries that developed a first NAIP but not a second (N10 countries) also showed significantly lower income levels in 2021 than the African average.

6 N00 = group of countries that have neither a first-generation NAIP (NAIP1.0) nor a second-generation NAIP (NAIP2.0); N10 = group of countries that have NAIP1.0 but do not have NAIP2.0; N01 = group of countries that have NAIP2.0 but not NAIP1.0; N11 = group of countries that have both NAIP1.0 and NAIP2.0. A second-generation NAIP refers to a NAIP that takes into account the commitments of the 2014 Malabo Declaration; thus, a NAIP can be considered second-generation even if the country does not have a pre-Malabo Declaration, first-generation NAIP.

7 Considering that CAADP was launched in 2003, renewed in 2008, and renewed again 2014 with the Malabo Declaration, the years 2003, 2008, and 2014 represent important milestones. Therefore, the post-CAADP subperiods for reporting on progress use overlapping years to mark these milestones that usually occurred during the middle of the year in June, that is, 2003–2008, 2008–2014, and 2014–2021.

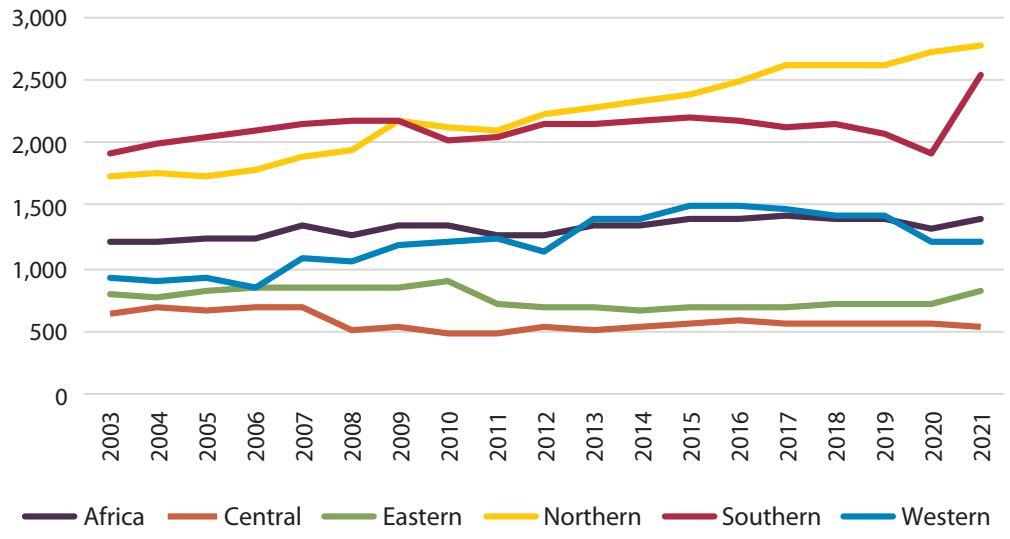
FIGURE 9.2—GROSS DOMESTIC PRODUCT PER CAPITA (CONSTANT 2015 US DOLLARS), ANNUAL AVERAGE PERCENTAGE CHANGE, 2003–2021



Source: ReSAKSS based on World Bank (2022) and ILO (2022).

Household consumption expenditure, which captures household spending on goods and services, is another measure of economic well-being and shows patterns similar to GDP per capita. Growth rates of household consumption expenditure per capita have decelerated since 2003, turning slightly negative during the 2014–2021 period for Africa as a whole (Table L1.1.2). The fall in spending was most severe in western Africa, falling by an annual average rate of –2.7 percent during 2014–2021 period; all other geographic regions showed either slight annual declines or moderate annual increases in spending over the same period. Reflecting its relatively strong GDP per capita growth (Figure 9.2), northern Africa showed the highest annual average growth in household consumption expenditure among geographic regions (2.4 percent) during 2014–2021. Northern Africa also had the highest level of household spending in 2021, followed by southern Africa, while eastern and central Africa had the lowest (Figure 9.3). Relatively high growth in household consumption expenditure during the 2014–2021 period was also observed in countries with more favorable agricultural conditions and in the IGAD countries.

FIGURE 9.3—HOUSEHOLD CONSUMPTION EXPENDITURE PER CAPITA (CONSTANT 2015 US DOLLARS), 2003–2021



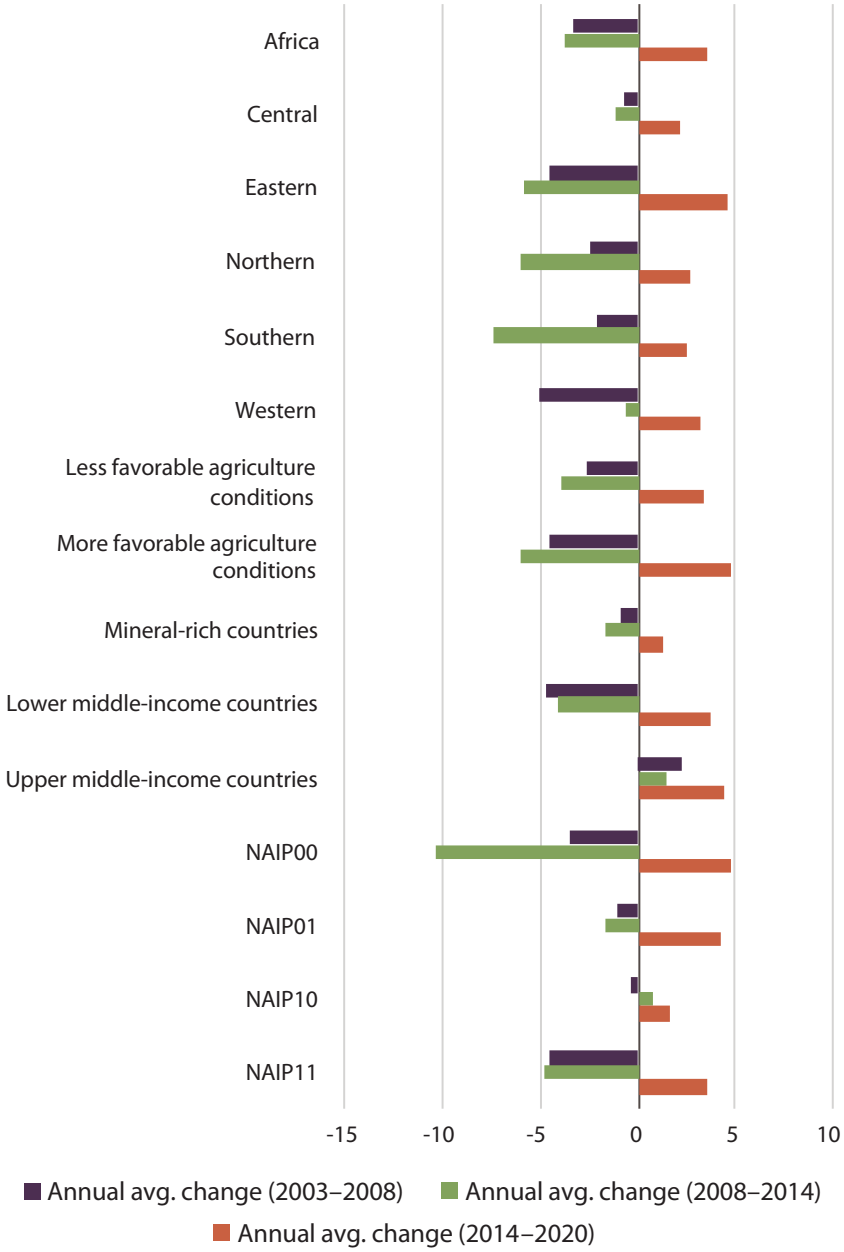
Source: ReSAKSS based on World Bank (2022) and ILO (2022).

Food and Nutrition Security

Like economic growth, food security in Africa has been severely affected by the COVID-19 pandemic. Moreover, the continent already faced increasing food security challenges in the years before the COVID-19 crisis. A prime example is the prevalence of undernourishment, which measures the share of population with caloric intake below the minimum dietary energy requirement. Undernourishment decreased by 3.4 percent annually in 2003–2008, and fell even faster at 3.8 percent per year in 2008–2014. However, the share of undernourished people increased significantly during the 2014–2020 period, rising by 3.5 percent annually (Figure 9.4, Table L1.2.1). This increase is partly related to the COVID-19 pandemic, as reflected in a rise in undernourishment in 2020. However, the prevalence of undernourishment was already growing before 2020, having increased by an annual average of 1.1 percent during 2014–2019 (Tefera, Collins, and Makombe 2021). Although data are not yet available, undernourishment is expected to have risen further in 2021 (FAO et al. 2022), with continued crises in 2022 related to the Russia-Ukraine conflict likely further exacerbating hunger. A study on food security and poverty impacts of the Russia-Ukraine crisis in 10 African countries estimates that household food consumption during the 2022–2024 period will decline relative to the estimated levels in the absence of the crisis in the majority of countries examined due to food price inflation and decreases in household income (Badiane, Fofana, and Sall 2022).

Similar trends in undernourishment—declines in the first two CAADP periods followed by large increases in the third period—are seen in nearly all country groupings. Among geographic regions, eastern Africa showed the largest increase in undernourishment in 2014–2020 at 4.6 percent annually. Countries with more favorable agricultural conditions and countries with neither a first- nor second-generation NAIP (N00 countries) showed even larger increases of 4.8 percent for both groups. In terms of prevalence, undernourishment reached 17.4 percent of the population in Africa as a whole in 2020 (Table L1.2.1). The prevalence was highest in central Africa, mineral-rich countries, EAC and ECCAS countries, and countries with a first-generation but not a second-generation NAIP (N10 countries), all of which had undernourishment rates of 30 percent or above. The lowest rates of undernourishment, 10 percent or below, were observed in northern Africa, upper middle-income countries, UMA

FIGURE 9.4—PREVALENCE OF UNDERNOURISHMENT, ANNUAL AVERAGE PERCENTAGE CHANGE, 2003–2020



Source: ReSAKSS based on FAO (2022) and ILO (2022).

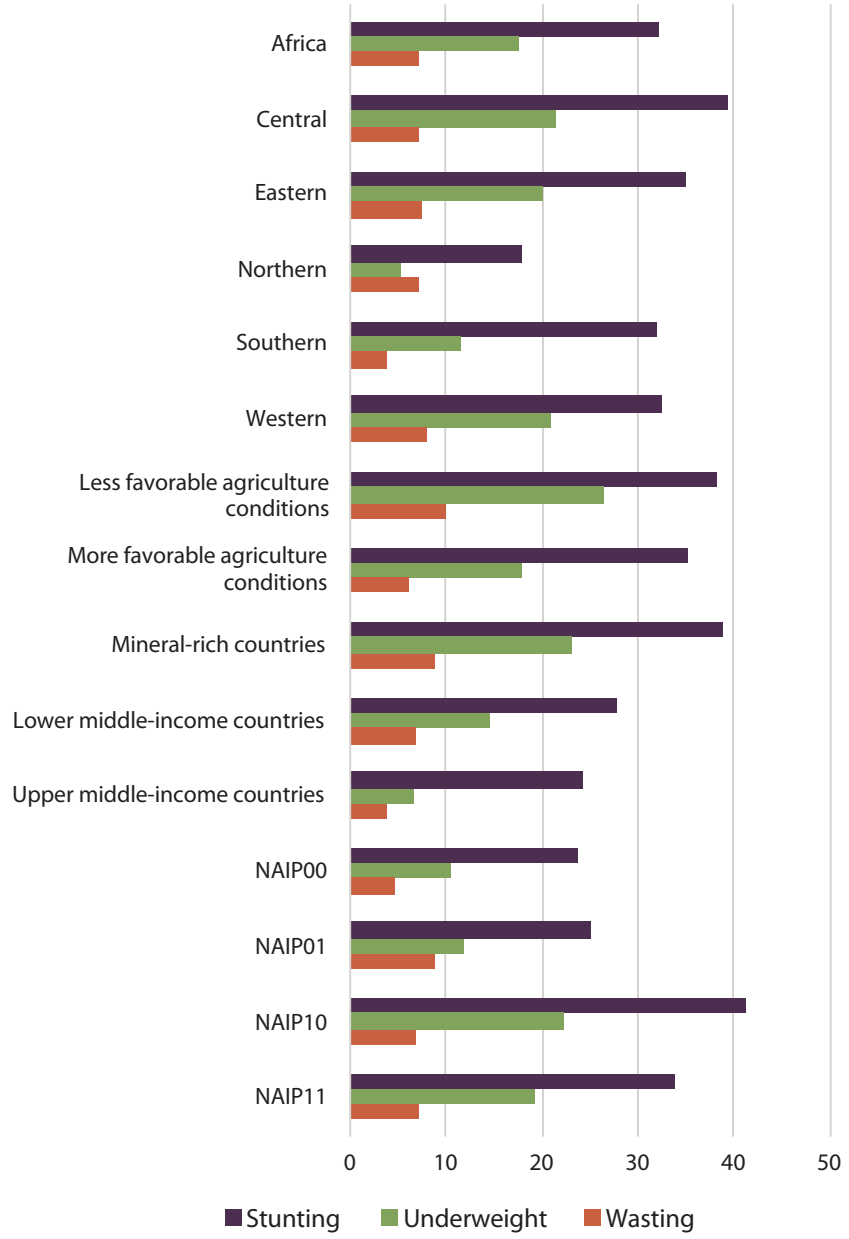
countries, and countries with neither a first- nor second-generation NAIP (N00 countries).

Child malnutrition is an urgent humanitarian issue in the short term and also has longer-term implications for human capital development. We look at trends in three common indicators of malnutrition in children under five years: stunting, or low height-for-age; underweight, or low weight-for-age; and wasting, or low weight-for-height. All three indicators saw moderate declines across the entire period from 2003 to 2019, the last year with available data. The prevalence of child stunting declined at average annual rates of 1.2 percent during the 2003–2008 period, 2.0 percent during the 2008–2014 period, and 1.2 percent during the 2014–2019 period (Table L1.2.2B). Rates of decline were quite similar for the prevalence of child underweight, which fell by annual average rates of 1.5 percent, 2.2 percent, and 1.7 percent during the three periods (Table L1.2.2A), as well as the prevalence of child wasting, for which average annual declines were 1.3 percent, 2.0 percent, and 2.1 percent (Table L1.2.2C). For all three indicators, these rates of decline were steady but not rapid enough to greatly reduce the proportion of malnourished children. As of 2019, 31.3 percent of children were stunted in Africa as a whole, 16.8 percent were underweight, and 6.8 percent were wasted. As with other measures of food and nutrition security, child stunting, wasting, and underweight are all expected to have increased in 2020 due to the impacts of COVID-19 (FAO et al. 2022).

Figure 9.5 presents the average levels of child stunting, underweight, and wasting during the 2014–2019 period. The three indicators show similar patterns. Among geographic regions, central Africa had the highest rates of stunting and underweight; western Africa showed the highest rates of wasting as well as high levels of the other two indicators. Countries with less favorable agricultural conditions and mineral-rich countries had high levels of all three types of malnutrition. Among NAIP groupings, countries with only a first-generation NAIP (N10 countries) had the highest rates of stunting and underweight, while countries with only a second-generation NAIP (N01 countries) had the highest rates of underweight.

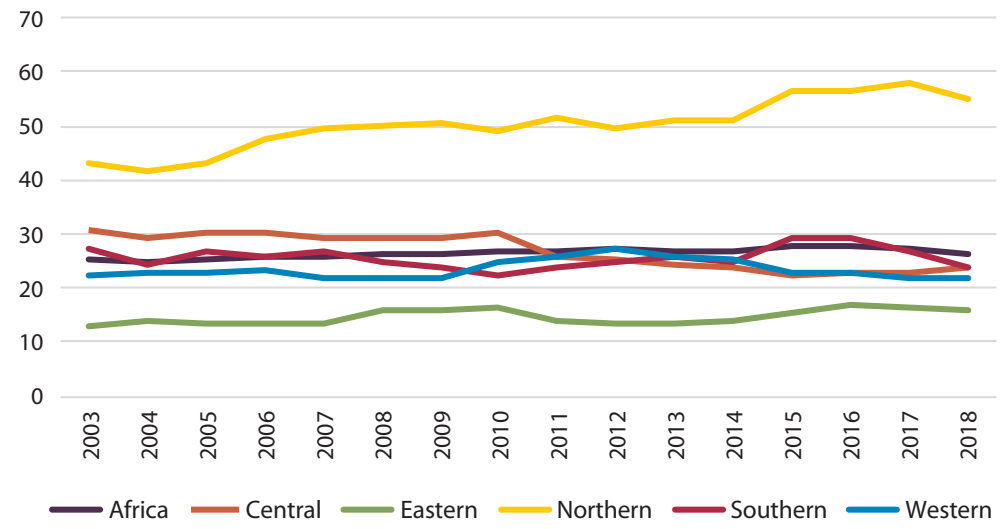
High rates of dependency on food imports can affect countries' food security by making them more vulnerable to international price volatility and other trade disruptions (Luo and Tanaka 2021). The risks of exposure to trade shocks were demonstrated during the Russia-Ukraine conflict in 2022, which caused sharp increases in the international prices of wheat and other commodities, negatively affecting many African countries' terms of trade and causing increased poverty

FIGURE 9.5—PREVALENCE OF UNDERWEIGHT, STUNTING, AND WASTING IN AFRICA (PERCENTAGE OF CHILDREN YOUNGER THAN FIVE), 2014–2019 AVERAGE



Source: ReSAKSS based on World Bank (2022) and ILO (2022).

FIGURE 9.6—CEREAL IMPORT DEPENDENCY RATIO, 2003–2018 (PERCENT)



Source: ReSAKSS based on FAO (2022), World Bank (2022), and ILO (2022).

and hunger (Badiane, Fofana, and Sall 2022). Africa's dependency on cereal imports, calculated as the share of imports in total supply of cereals, increased slightly through much of the CAADP period before decreasing marginally in recent years (Figure 9.6 and Table L1.2.3). The dependency ratio stood at 27.2 percent on average during 2014–2018 (the most recent year with available data), slightly greater than the average 2003–2008 level of 25.6 percent.

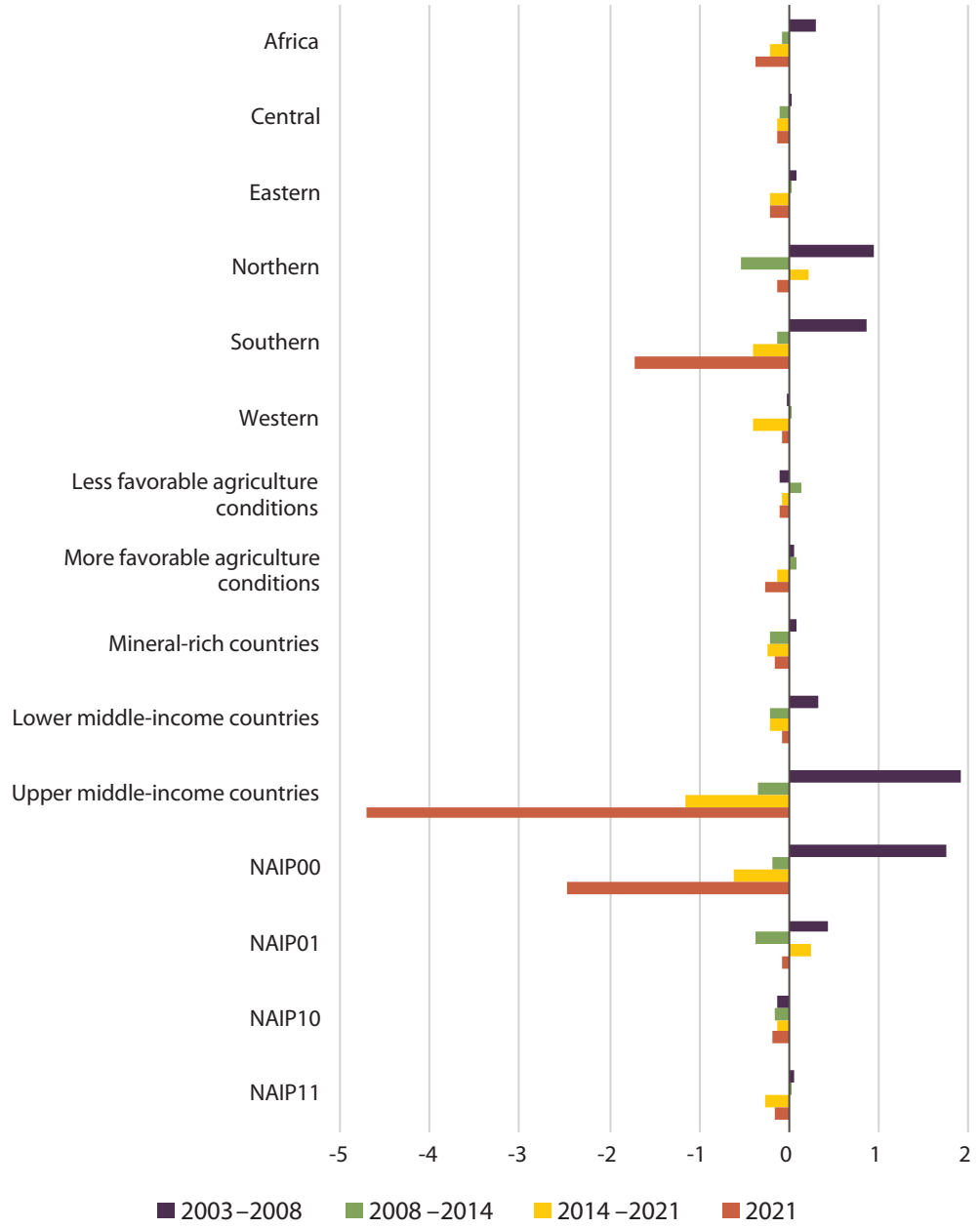
The cereal import dependency ratio shows marked differences among regions. Northern Africa's dependency is significantly higher than all other regions and has also increased faster, rising from an average of 45.9 percent during the 2003–2008 period to 55.4 percent during the 2014–2018 period—over half of cereal consumed in the region is now imported. Eastern Africa showed the lowest cereal import dependency ratios throughout the CAADP period, but saw its ratio rise from 13.7 percent in 2003–2008 to 15.7 percent in 2014–2018. Among economic groupings, lower middle-income countries had the highest dependency ratios as of 2014¬–2018, followed by upper middle-income countries. Countries without a first-generation NAIP—N00 and N01 countries—had relatively high dependency ratios of 40 percent or greater during the same period, while rates were closer to 20 percent in countries with a first-generation NAIP: N10 and N11 countries had dependency ratios of 19.2 and 21.3 percent, respectively.

Employment

Africa's employment rate measured both as a percentage of the labor force (Figure 9.7, Table L1.3.1A) and as a percentage of the population 15 years of age and above (Table L1.3.1B) rose slightly during the first post-CAADP period of 2003–2008, but followed a declining trend in the subsequent periods. The COVID-19 pandemic accelerated this trend: employment as a proportion of the labor force fell annually by 3.4 percent from 2019 to 2020, a much sharper decrease than the average annual decrease in the period 2014–2019 of 0.04 percent (Tefera, Collins, and Makombe 2021). Despite the resumption of positive economic growth in 2021, the employment rate did not recover, declining by a further 0.37 percent from 2020 to 2021. While employment's recovery from the impacts of COVID-19 has been slower than expected globally, developing countries have been especially strongly affected. In Africa, several factors, including low vaccination rates, additional lockdowns associated with new variants, and continued population growth and new entrants to the labor force, have contributed to even lower employment rates in 2021 than in 2020 (ILO, 2022). Declines in employment as a share of the labor force in 2021 were especially steep in southern African and western African countries, upper middle-income countries, and countries with neither a first- nor a second-generation NAIP (N00 countries). Over the 2014–2021 period as a whole, these groups showed the largest drop in the employment rate.

In terms of the employment rate, 92.1 percent of Africa's labor force was employed in 2021, representing a slight decline from the 2003 level of 92.4 percent. The employment rate was lowest in northern and southern Africa, at 88.7 and 85.1 percent respectively, and highest in central and eastern Africa, at 94.7 percent in both regions. Among all country groupings, upper middle-income countries had the lowest employment rate by far of 71.3 percent, while

FIGURE 9.7—EMPLOYMENT RATE (PERCENT OF LABOR FORCE, 15–64 YEARS), ANNUAL AVERAGE PERCENTAGE CHANGE, 2003–2021



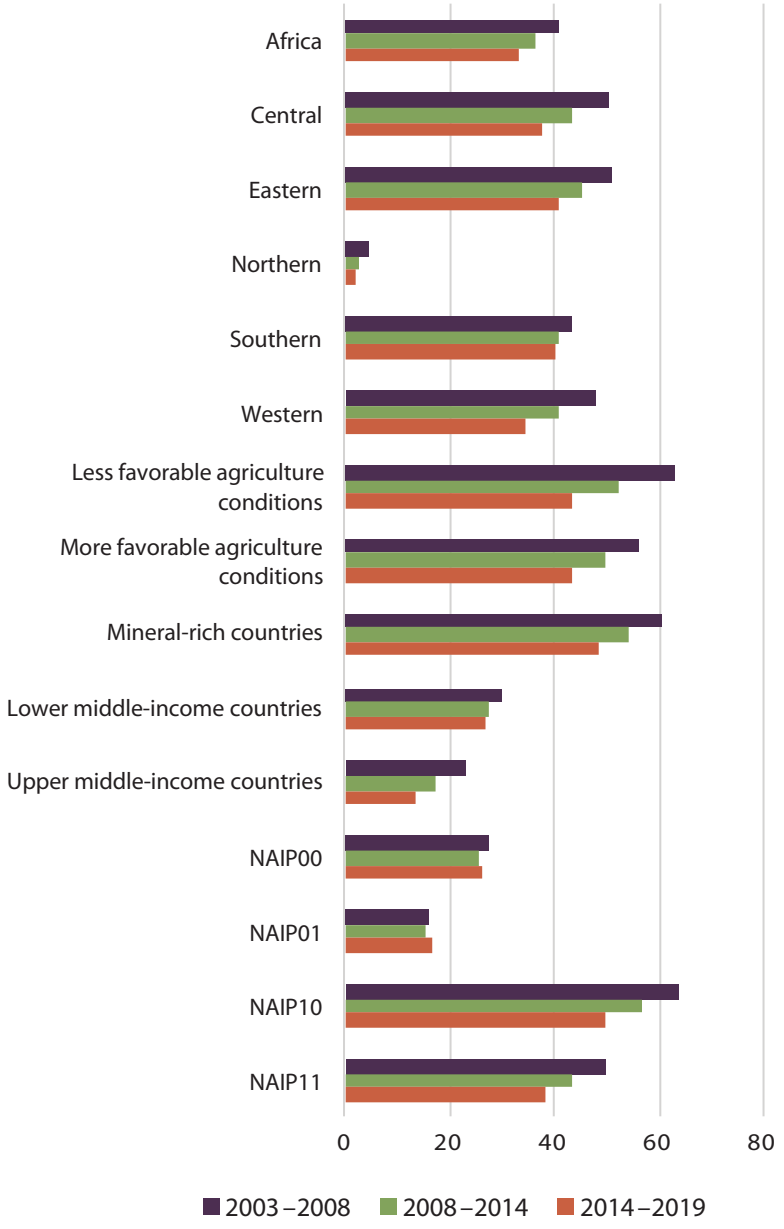
Source: ReSAKSS based on ILO (2022).

the highest employment rate of 95.7 was observed in countries with less favorable agricultural conditions. These trends concord with cross-country analysis by the World Bank, which found that employment rates tend to be higher in low-income countries than in wealthier countries due to the greater necessity faced by populations to earn money; however, low-income countries have high rates of underemployment and informal employment (Merotto, Weber, and Aterido 2018). Employment as a percent of the population over 15 years stood at 56.6 percent in 2020 for Africa as a whole, the last year with available data, down from 59.8 percent in 2003.

Poverty

The poverty headcount ratio measures the share of the population living below the international extreme poverty line of $1.90 per day in 2011 purchasing power parity (PPP). Poverty declined steadily from 2003 through 2019—the last year with data available—for Africa as a whole and for most country groupings (Figure 9.8, Table L1.3.4). At the continental level, the poverty headcount ratio decreased from an average of 41.1 percent during the 2003–2008 period to 33.3 percent during 2014–2019. Among geographic regions, poverty has consistently been much lower in northern Africa, which showed an average poverty headcount ratio of 1.7 percent in 2014–2019. Poverty was highest in the southern and the eastern Africa regions, with rates of 40.1 percent and 41.1 percent, respectively, during the same period. Similarly, among RECs, SADC and EAC had the highest poverty rates in 2014–2019 of over 45 percent, while poverty in UMA had declined to under 1 percent. Both lower and upper middle-income countries had significantly lower poverty rates than the other economic groupings; among low-income countries, those rich in minerals showed the highest poverty rates in 2014–2019 of 48.3 percent. Countries with a first-generation NAIP (N10 and N11 countries) also showed high poverty rates of 49.5 percent and 38.1 percent, respectively. However, N10 and N11 countries showed relatively rapid declines in the poverty rate—as did

FIGURE 9.8—POVERTY HEADCOUNT RATIO AT $1.90 (2011 PPP) PER DAY (PERCENT), 2003–2019



Source: ReSAKSS based on World Bank (2022) and ILO (2022).

western and central African countries and countries with less favorable agricultural conditions—while countries without a first-generation NAIP (N00 and N10 countries) showed slight increases in the poverty rate in the 2014–2019 period.

The consistent declines in the poverty headcount ratio in Africa and across most country groupings were not sufficient to significantly reduce poverty, and the absolute numbers of poor people had begun to increase in Africa even before the COVID-19 pandemic. Data on poverty levels in 2020 and 2021 are not yet available, but it is clear that the pandemic greatly exacerbated existing challenges. The Russia-Ukraine conflict in 2022 and associated trade and price shocks are likely to have caused further deterioration in living standards. The World Bank estimates that the combined impacts of the pandemic and the Russia-Ukraine crisis have led to a rise in the number of poor people in Africa south of the Sahara in 2022 of at least 23.3 million people compared to pre-pandemic projections (Mahler et al. 2022).

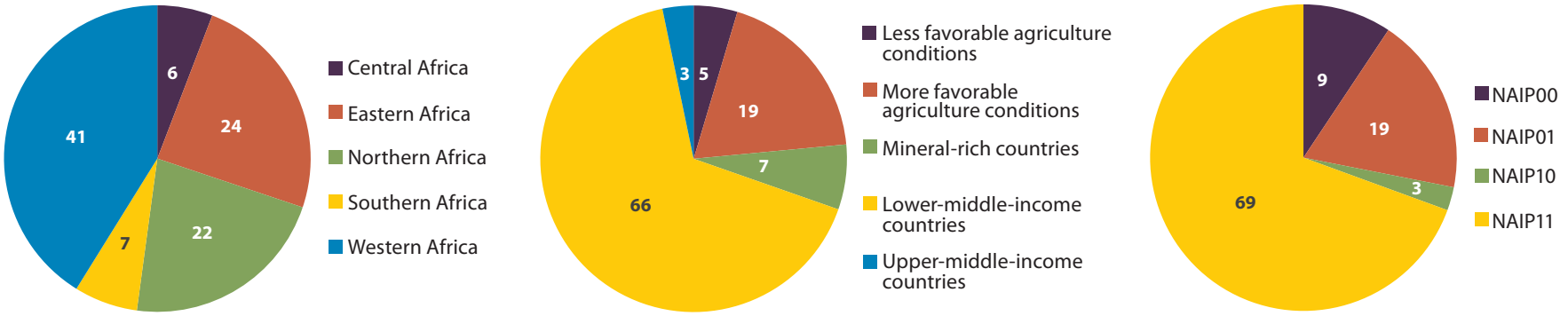
The extreme poverty gap, a measure of the depth of poverty, represents the average distance below the $1.90/day poverty line for the poor population. Prior to the onset of the pandemic, the poverty gap decreased throughout the CAADP period for Africa as a whole, declining from an average of 16.1 percent in 2003–2008 to 11.0 percent in 2014–2019, the last year with available data (Table L.1.3.3). The decrease in the severity of poverty accelerated over the CAADP period, with annual average rates of decline of 3.0 percent in 2003–2008, 3.4 percent in 2008–2014, and 4.2 percent in 2014–2019 for Africa as a whole. Among geographic regions, the poverty gap shrank the fastest in the northern and western Africa regions, which also showed the lowest poverty gaps in 2014–2019 of 0.3 and 10.3 percent, respectively. The poverty gap decreased most slowly in southern Africa, even showing a small average annual increase during the 2008–2014 period. The overall positive performance in reducing the severity of poverty is expected to have been reversed by the COVID-19 pandemic. Continuing employment and income losses are expected to have increased the depth of poverty as well as the prevalence (ILO 2022).

CAADP Results Framework Level 2 Indicators: Agricultural Transformation and Sustained Inclusive Agricultural Growth

Agricultural Production and Productivity

In Africa, agriculture is the largest economic sector in terms of employment with close

FIGURE 9.9—AGRICULTURE VALUE ADDED, PERCENTAGE SHARE IN AFRICA TOTAL, 2014–2021, BY GEOGRAPHIC REGION, INCOME CATEGORY, AND NAIP FORMULATION STAGE



Source: ReSAKSS based on World Bank (2022).

to 60 percent of the population aged 15 and over working in the sector (Table L1.3.1b). In addition, the sector plays a crucial role on the continent by supplying food for consumption, as a source of earnings from agricultural exports (Dercon and Gollin 2014), and through the income it provides the majority of rural households (Rufai, Salman, Salawu 2018). For Africa as a whole, agriculture value added accounted for 15.3 percent of GDP during 2014–2021, slightly less than the 16.1 percent recorded during the early CAADP period, 2003–2008 (Table O.3.2). However, the share and, hence, importance of agriculture in total GDP varies among African countries; the agricultural GDP share reaches 30 percent or higher in a number of countries.

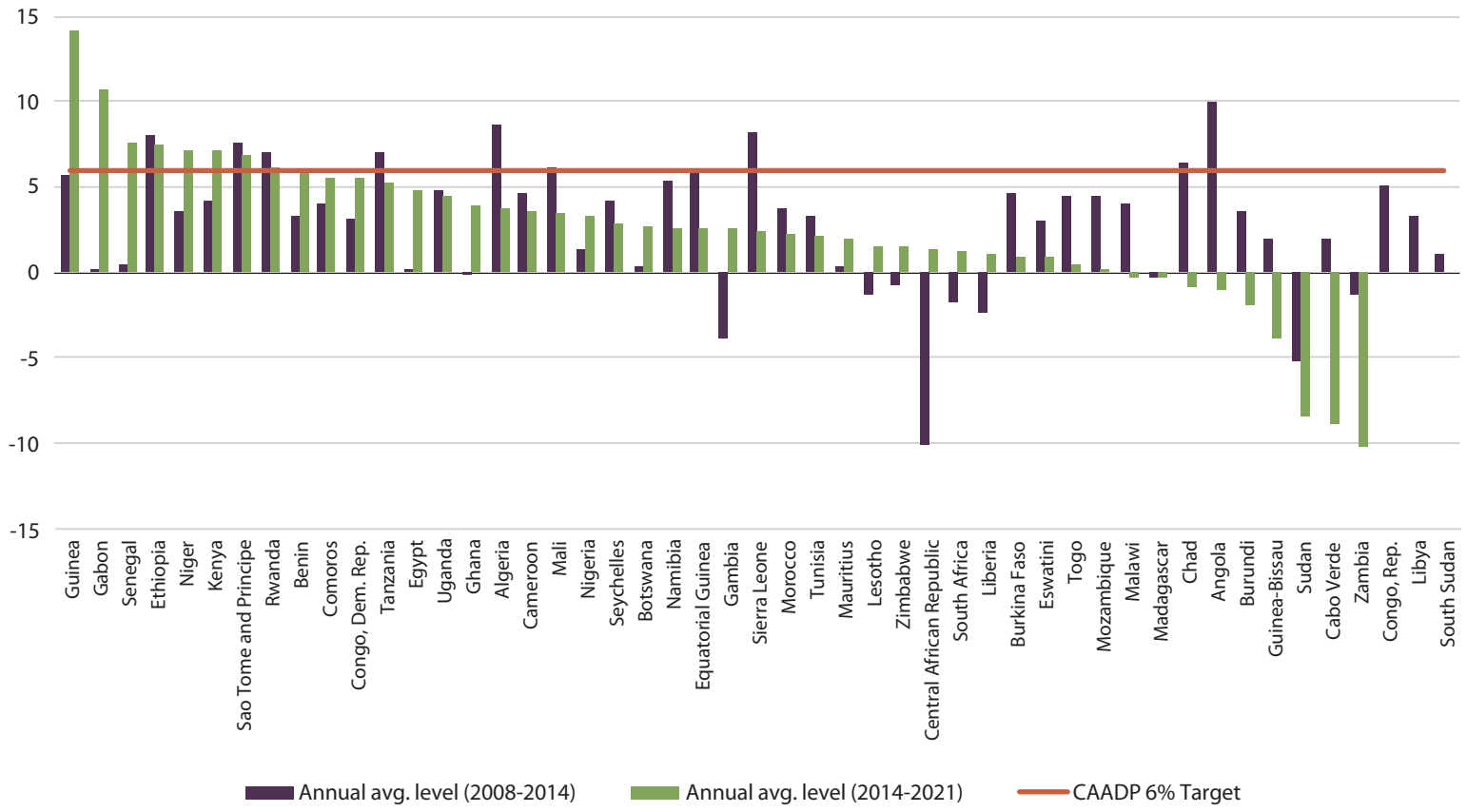
For Africa as a whole, agriculture value added increased from $257.9 billion during the early CAADP period of 2003–2008 to $313.8 billion in 2008–2014 and $382.3 billion in 2014–2021. Unlike the overall economy, the agriculture sector has continued to grow since the onset of COVID-19 in 2020. COVID-19 affected the continent's agriculture sector performance mainly during early 2020 when lockdowns were implemented. In general, the negative outcomes of these measures were contained (OBG 2021). The food security problems that followed the introduction of COVID-19 lockdown measures in Africa were largely related to obstacles to food access, while the impact on agricultural production and food availability has been smaller (FAO 2021).

Agriculture value added recorded by the different subgroups shows that a few categories of countries dominated agricultural production throughout the review period. For example, the western Africa region accounted for 41 percent of the total agriculture value added on the continent during 2014–2021. Likewise, middle-income countries and the countries that formulated both first- and second-generation NAIPs (N11) account for two-thirds of the total production among their respective categories. This is followed by the countries in eastern Africa, countries with more favorable agricultural conditions, and the group of countries that formulated only second-generation NAIPs (NAIP 01), with shares between 19 and 24 percent (Figure 9.9).

Agriculture value added in Africa increased at only a moderate rate, reaching 3.3 percent on average during 2014–2021. As a result, Africa has not been able to meet the CAADP target of sustaining at least 6 percent annual growth in agriculture value added. The same is true for the different country groupings, particularly during 2008–2014 and 2014–2021 (Table L2.1.1). However, three countries have been able to surpass the 6 percent target in both subperiods—Ethiopia, Sao Tome and Principe, and Rwanda—while a handful of other countries managed to meet the target in one of the two periods (Figure 9.10).

The agriculture production index measures agricultural production for each year in comparison with the base period of 2014–2016. The findings show that

FIGURE 9.10—AGRICULTURE VALUE ADDED ANNUAL AVERAGE GROWTH (PERCENTAGE), 2008–2021



Source: ReSAKSS based on World Bank (2022) and ILO (2022).

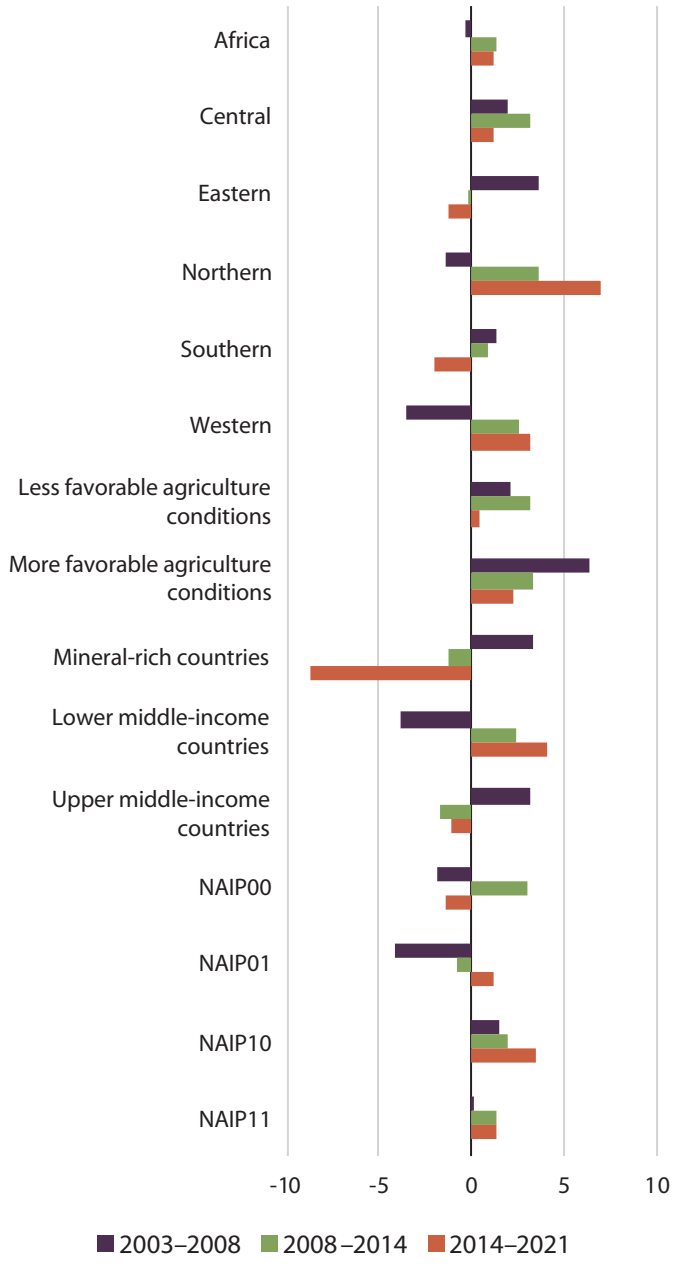
the continent as a whole as well as the various subgroups recorded a consistent increase in the agriculture production index during the entire review period. In 2014–2020, the annual average index for Africa was 104.7, up from 77.0 and 88.8 recorded during 2003–2008 and 2008–2014 (Table L2.1.2). The data also show that agricultural production continued to increase during 2020 after the onset of COVID-19, although at a slower rate compared to the recent past periods, perhaps reflecting the impacts of the pandemic.

For Africa as a whole, agricultural labor productivity, measured by agriculture value added per worker, increased modestly from $1,504 in 2003–2008 to $1,630 in 2008–2014 and further to $1,800 during 2014–2021. However, labor productivity on the continent has not reached half of the global average (Ritchie 2022). During the first CAADP period of 2003–2008, labor productivity on the continent recorded negative annual average growth. The growth in labor productivity improved and grew at an annual average rate of 1.2 percent during

2008–2014 and during 2014–2021 (Table L2.1.3). The negative labor productivity growth in the northern and the western Africa regions in 2003–2008 appears responsible for the continentwide contraction recorded in 2003–2008. Similarly, the notable growth recorded during 2014–2021 in these two regions likely drove the higher growth in continental-level agricultural labor productivity (Figure 9.11).

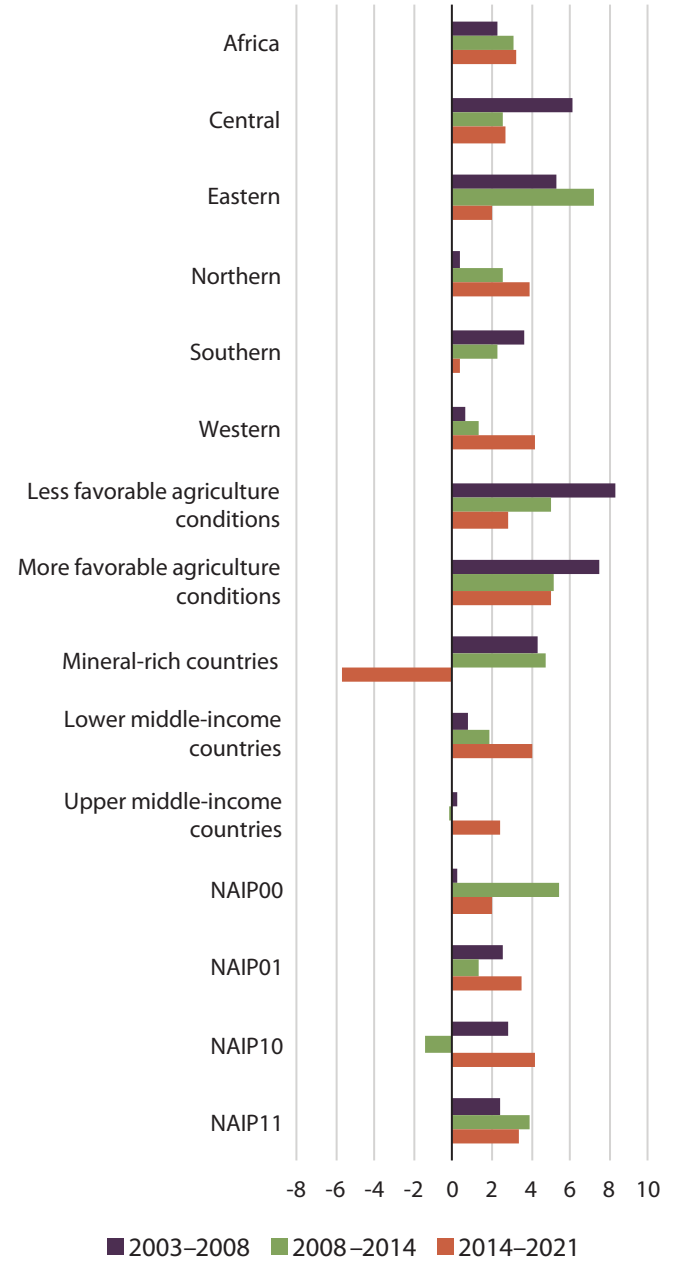
Agricultural land productivity, which measures agriculture value added per hectare of agricultural land, consistently grew over the entire CAADP period. For Africa as a whole, it accelerated from an annual average of 2.3 percent in 2003–2008 to 3.1 percent during 2008–2014 and 3.2 percent in 2014–2021 (Table L2.1.4). During the entire CAADP period (2003–2021), consistent growth in land productivity was recorded in the northern and western Africa regions, while declining growth was observed in southern Africa (Figure 9.12). Countries with more favorable agricultural conditions are the only subgroup that managed to record land productivity growth above 5 percent throughout the CAADP period (Table L2.1.4).

FIGURE 9.11—LABOR PRODUCTIVITY, ANNUAL AVERAGE PERCENTAGE CHANGE, 2003–2021



Source: ReSAKSS based on World Bank (2022) and FAO (2022).

FIGURE 9.12—LAND PRODUCTIVITY, ANNUAL AVERAGE PERCENTAGE CHANGE, 2003–2021



Source: ReSAKSS based on World Bank (2022) and FAO (2022).

Although land productivity showed an increasing trend during the full CAADP period, it remained low in comparison with other regions of the world. For example, the average cereal yield in 2020 was 1.65 tons per hectare for Africa, while it was 4.07 tons per hectare globally. As a result of such low productivity levels, about 70 percent of the increase in agricultural production that took place in the continent was due to area expansion and not to greater land productivity (Ritchie, 2022).

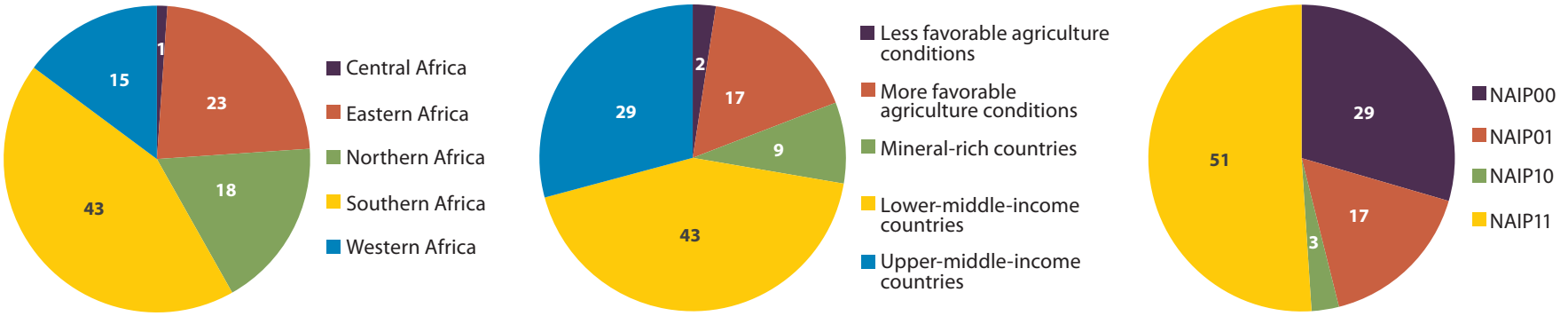
The CAADP RF includes indicators to measure yields of five priority agricultural commodities. This chapter examines yields of cassava, cattle meat, yam, cow milk, and maize, which together accounted on average for 29 percent of the total value of agricultural produce on the continent during 2003–2020. Over this period, cassava had the highest production share at 7.25 percent of the total value of production, followed by cattle meat (7.23 percent), yams (5.14 percent), cow milk (4.79 percent), and maize (4.58 percent). Of these commodities, only maize exhibited a yield increase over the entire CAADP period. A declining trend was recorded for cassava and yams, while yields for cattle meat and cow milk showed little change between the initial CAADP period (2003–2008) and the most recent period (2014–2020) (Tables L2.1.5A, L2.1.5B, L2.1.5C, L2.1.5D, and L2.1.5E).

Intra-African Agricultural Trade

Africa's total agricultural exports as a share of total merchandise exports improved during the CAADP period from an annual average of 8.3 percent in 2003–2008 to 9.1 percent in 2008–2014 and further to 12.8 percent in 2014–2021. There are, however, marked differences among the different country groupings. The contribution of agriculture to total exports was highest in eastern Africa and in countries with more favorable agricultural conditions, where the shares were 43.4 percent and 34.9 percent, respectively, during 2014–2021 (Table O.2.1A). In 2021, Africa's total agricultural exports to the rest of the world reached $63.2 billion.

Turning to trade within Africa, Africa has improved its intra-African agricultural trade during the entire CAADP period. Intra-African agricultural exports more than doubled from $5.7 billion in 2003 to $14.4 billion in 2021 (Table L2.2.1A). Over this period, country groupings that recorded intra-African agricultural export growth above the average for Africa as a whole included eastern Africa, northern Africa, countries with more favorable agricultural conditions, mineral-rich countries, and the group of countries that formulated either NAIP2.0 only (N01) or both first- and second-generation NAIPs (N11). In general, these findings suggest that Africa needs to do more to

FIGURE 9.13—INTRA-AFRICAN AGRICULTURAL EXPORTS (PERCENTAGE SHARE OF TOTAL, 2014–2021)



Source: ReSAKSS based on UNCTAD (2022) and World Bank (2022).

achieve the 2014 Malabo Declaration commitment to triple intra-African trade in agricultural commodities and services by the year 2025.

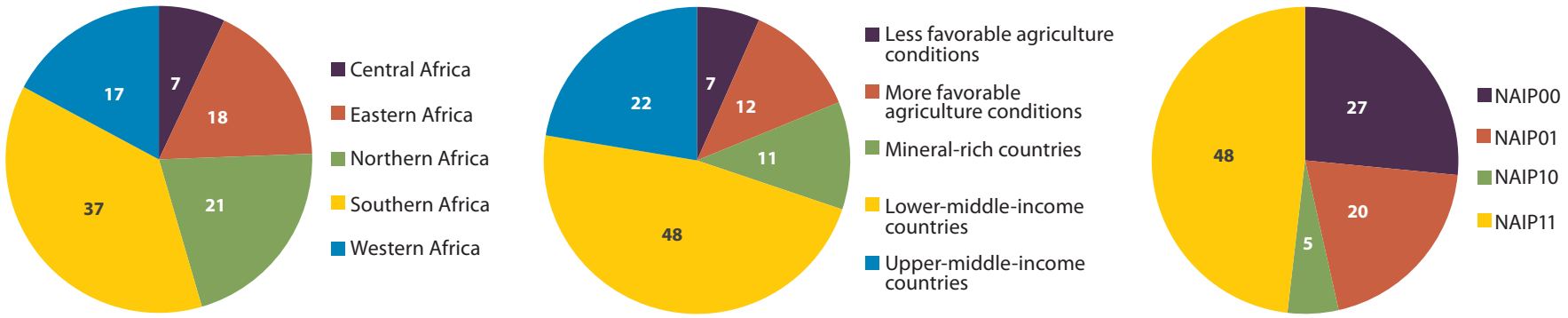
The shares of intra-African agricultural exports by the different country groupings during 2014–2021 are presented in Figure 9.13. It shows that the level of intra-African trade differs substantially by country groupings with some groupings predominating most trade. Namely, southern Africa, lower middle-income countries, and the group of countries that have formulated both NAIP1.0 and NAIP2.0 (N11) account for large shares of intra-African agricultural exports. In contrast, intra-African agricultural trade was lowest in central Africa, countries with less favorable agricultural conditions, and the group of countries that have only formulated a first generation NAIP (N10).

Intra-African agricultural exports declined following the movement restrictions implemented in early 2020 with the onset of COVID-19. However, compared to exports to the rest of the world, intra-African exports have been more resilient (Luke and MacLeod 2021). In fact, intra-African agricultural exports in 2020 were 6.3 percent higher than in 2019. The trade impact of COVID-19 has reinforced the importance of developing trade within Africa (Banga et al. 2020).

Intra-African agricultural imports also more than doubled from $7.7 billion recorded in 2003 to $16.5 billion in 2021 (Table L2.2.1B). Intra-African agricultural imports grew by between 170 and 270 percent in northern Africa, countries with less favorable agricultural conditions, and the group of countries that have not yet embarked on NAIP formulation (N00). In addition, as seen in Figure 9.15, the country groupings that account for substantial shares of intra-African agricultural imports are southern Africa, lower middle-income countries, and the group of countries that have formulated both NAIP1 and NAIP2 (N11). The groups with the smallest shares of intra-African agricultural imports include central Africa, countries with less favorable agricultural conditions, and countries that have only a first-generation NAIP (N10). Figure 9.13 and Figure 9.14 indicate that the same country groups are major players in both intra-African imports and exports, which suggest that agricultural trade within Africa is regionally concentrated.

Despite these increases in intra-African agricultural trade throughout the CAADP period, Africa ranks lower on the measure of intraregional agricultural trade as a share of total agricultural trade compared to other world regions. The major obstacles that impede intra-African trade include weak productive capacities, inadequate economic diversification, and tariff and nontariff related costs (FAO 2021).

FIGURE 9.14—INTRA-AFRICAN AGRICULTURAL IMPORTS (PERCENTAGE SHARE, 2014–2021)



Source: ReSAKSS based on UNCTAD (2022) and World Bank (2022).

CAADP Results Framework Level 3 Indicators: Strengthening Systemic Capacity to Deliver Results

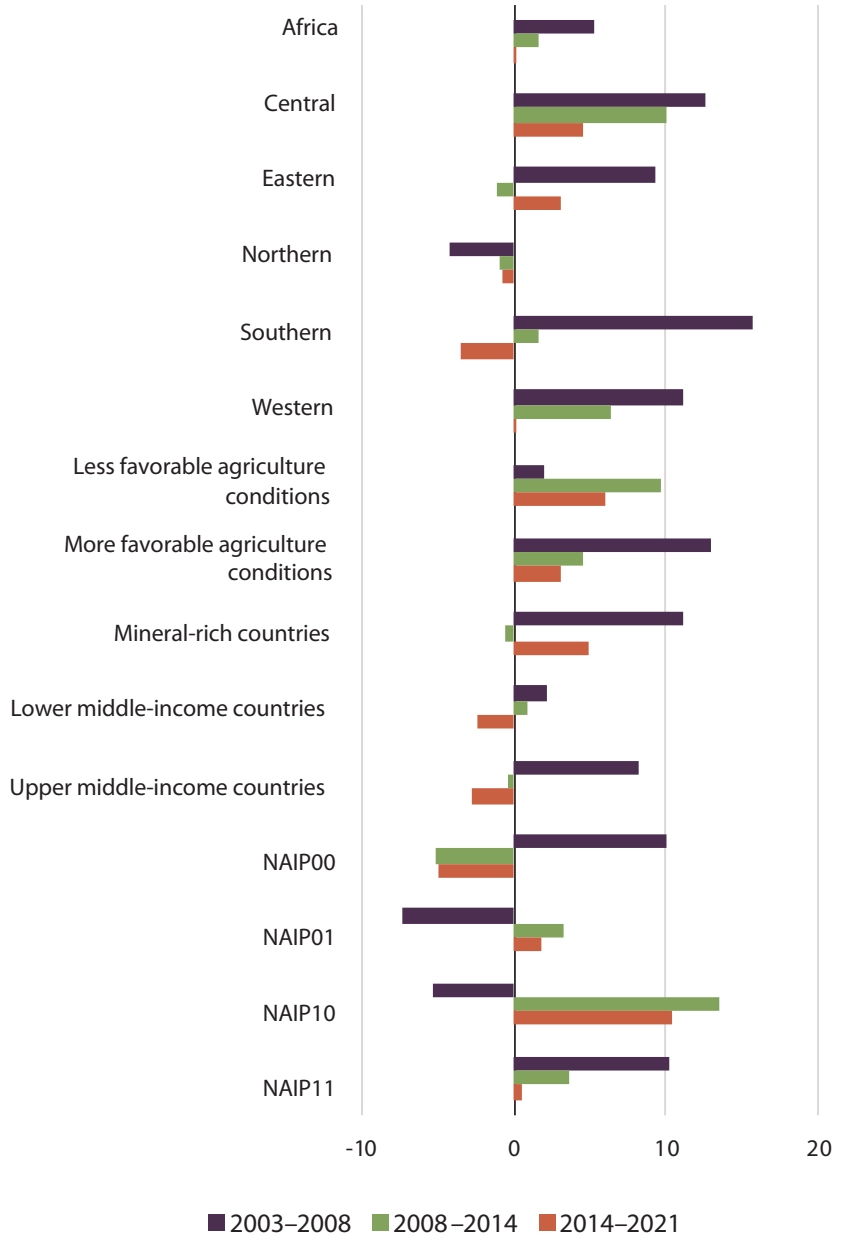
Capacities for Policy Design and Implementation

Indictors of progress in the implementation of actions aimed at strengthening systemic capacity for agriculture and food-security policy planning and implementation are presented in Table L3(b) in Annex 3d. No changes in systemic capacity were observed since September 2021. Thus, as of September 2022, 42 countries had formulated new or revised second-generation NAIPs through inclusive and participatory processes; 28 had inclusive institutionalized mechanisms for mutual accountability and peer review (mainly JSRs); 36 were implementing evidence-based policies; 31 had functional multisectoral and multistakeholder coordination bodies—mainly agriculture sector working groups; and 22 had successfully undertaken agriculture-related public-private partnerships aimed at boosting specific agricultural value chains. ReSAKSS has worked with the country CAADP teams to set up or strengthen country Strategic Analysis and Knowledge Support Systems (SAKSS) rooted in the existing local capacities and infrastructure. The country SAKSS is a critical instrument for supporting the review of and dialogue on CAADP implementation at the country level. Between 2010 and 2017, SAKSS platforms were launched in a total of 14 countries: Benin, Burkina Faso, the Democratic Republic of Congo, Ethiopia, Ghana, Kenya, Mali, Mozambique, Rwanda, Senegal, Tanzania, Togo, Uganda, and Zimbabwe (Table L3(b)).

Government Agriculture Expenditure

Investments in agriculture, and government agriculture expenditure (GAE) in particular, are a key instrument for driving agricultural growth and poverty reduction. However, although the annual average level of Africa's GAE has increased over time, the rate of increase has been declining. Africa's GAE increased from an annual average of $13.3 billion in 2003–2008 to $14.6 billion in 2008–2014 and further to $16.3 billion in 2014–2021 (Table L3.5.1). And while GAE experienced strong growth following the launch of CAADP when it grew at an annual average of 5.3 percent in 2003–2008 for Africa as a whole,

FIGURE 9.15—GOVERNMENT AGRICULTURE EXPENDITURE, ANNUAL AVERAGE PERCENTAGE CHANGE, 2003–2021



Source: ReSAKSS based on IFPRI (2019), World Bank (2022), and national sources.

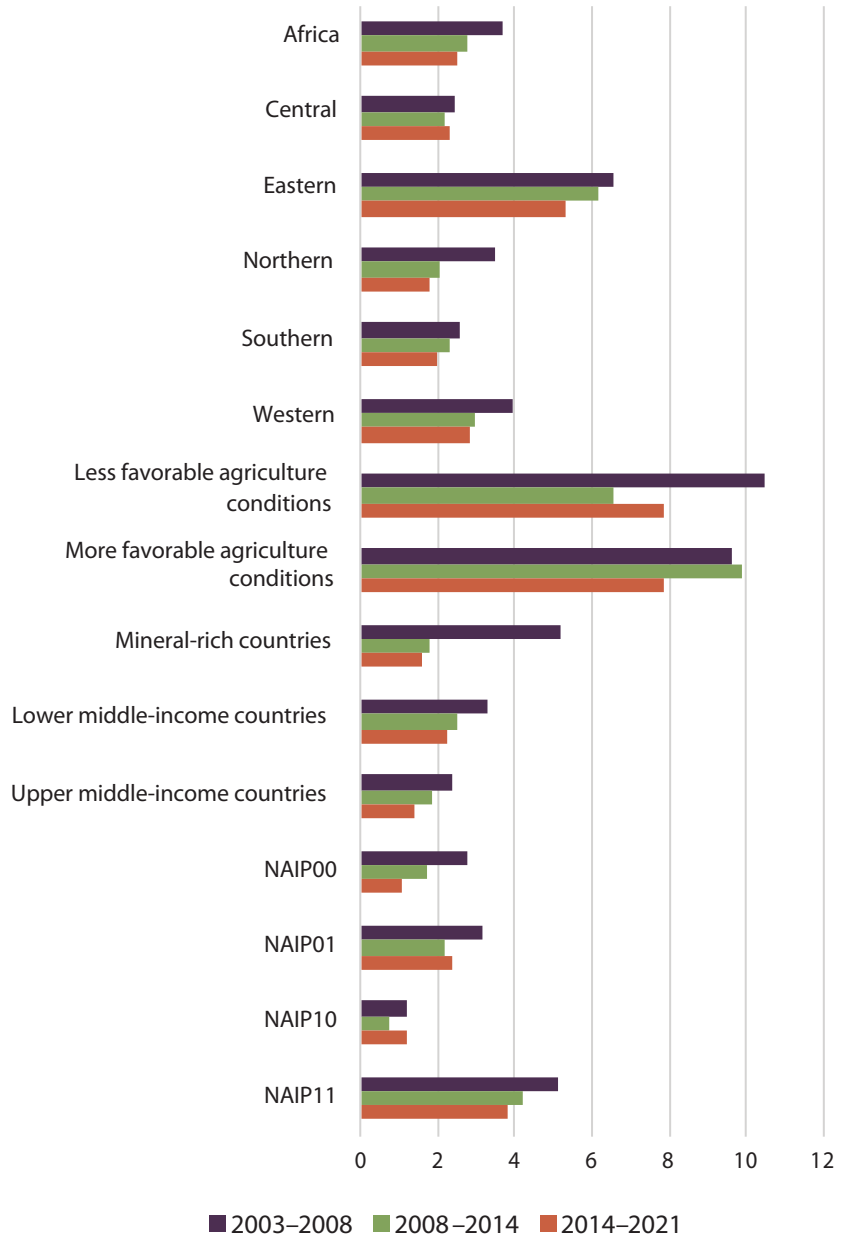
its growth has since decelerated to 1.7 percent in 2008–2014 and down to 0.1 percent in 2014–2021 (Figure 9.15, Table L3.5.1).

A similar pattern of strong growth in GAE in 2003–2008 followed by slower growth, particularly in 2014–2021, is also observed in most of the country groupings (Figure 9.16, Table L3.5.1). For example, although southern Africa experienced strong annual average growth in GAE of 15.6 percent in 2003–2008, the annual average growth rate decelerated to 1.7 percent in 2008–2014 and contracted to –3.5 percent in 2014–2021 (Figure 9.15). Only a handful of country groupings experienced strong growth in GAE of at least 5 percent in the most recent period of 2014–2021—countries with less favorable agricultural conditions (6.1 percent), EAC (5.8 percent), ECCAS (6.4 percent), and the group of countries that have only completed a first-generation NAIP (N10) (10.5 percent).

A key CAADP commitment, included in both the 2003 Maputo Declaration and 2014 Malabo Declaration, is the pledge by African leaders to allocate at least 10 percent of national budgets to the agriculture sector. Assessment of progress on this commitment shows that, across most country groupings, the share of government agriculture expenditure in total government expenditure has not only remained below the 10 percent CAADP target but has also been declining during the post-CAADP period (Figure 9.16, Table L3.5.2). For Africa as a whole, the share averaged 3.7 percent in 2003–2008, but fell to 2.7 percent in 2008–2014 and fell further to 2.5 percent in 2014–2021. Only two country groupings have met or come close to meeting the CAADP budget share target in the post-CAADP period. These are countries with less favorable agricultural conditions (10.5 percent in 2003–2008) and those with more favorable agricultural conditions (9.6 percent in 2003–2008 and 9.9 percent in 2008–2014) (Figure 9.16).

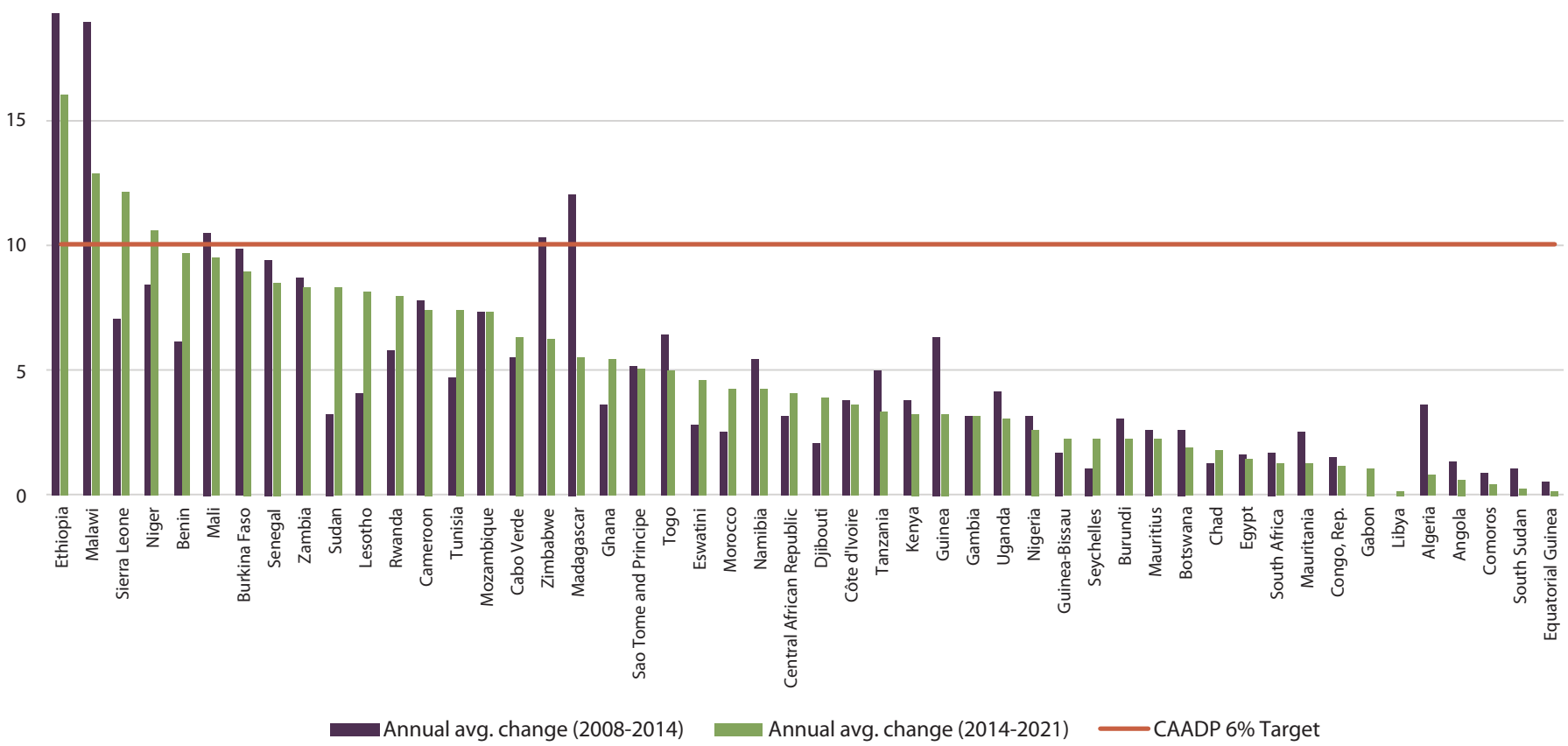
Country groupings that achieved an agriculture expenditure share of at least 5 percent in the most recent period of 2014–2021 include eastern Africa (5.3 percent), countries with less and more favorable agricultural conditions (7.9 percent and 7.8 percent, respectively), IGAD (5.9 percent), and the group of countries that are advanced in implementing CAADP (CL4) (5.2 percent) (Figure 9.16, Table L3.5.2). In addition, although ECCAS and the group of countries that have only completed the first-generation NAIP (N10) have some of the smallest shares of government agriculture expenditure in total government expenditure, they registered the highest growth rates in the share in 2014–2021, at7.0 percent and 13.0 percent, respectively (Table L3.5.2).

FIGURE 9.16—SHARE OF GOVERNMENT AGRICULTURE EXPENDITURE IN TOTAL GOVERNMENT EXPENDITURE (PERCENT), 2003–2021



Sources: ReSAKSS based on IFPRI (2019), World Bank (2022), and national sources.

FIGURE 9.17—SHARE OF GOVERNMENT AGRICULTURE EXPENDITURE IN TOTAL GOVERNMENT EXPENDITURE (PERCENT), 2008–2014 AND 2014–2021



Source: ReSAKSS based on World Bank (2022) and ILO (2022).

While no country grouping met the CAADP 10 percent budget target, Figure 9.17 shows that four countries met or surpassed the target in 2014–2021—Ethiopia, Malawi, Niger, and Sierra Leone. In addition, seven countries came close to meeting the 10 percent target in 2014–2021—Benin, Burkina Faso, Lesotho, Mali, Senegal, Sudan, and Zambia—with agriculture budget shares of more than 8 percent. Ensuring efficiency of government agriculture expenditures in driving agricultural growth objectives will require not only raising agriculture budget shares and the level of expenditures but also paying close attention to the quality and composition of the expenditures (Goyal and Nash 2017). Moreover, scarce public resources will need to be carefully targeted and allocated toward subsectors, including agricultural research and development (R&D) and rural roads, that have been shown to generate greater growth and poverty reduction outcomes (Fan, Mongues, and Benin 2009; Matchaya 2020).

The share of government agriculture expenditure in agriculture GDP provides a good measure of the priority a government places on agriculture expenditure relative to the size of its agriculture sector. Across most country groupings, the share of government agriculture expenditure in agriculture GDP has declined over time and especially in the more recent periods of 2008–2014 and 2014–2021. For Africa as a whole, the share fell from 5.2 percent in 2003–2008 to 4.7 percent in 2014–2019 and to 4.6 percent in 2014–2021 (Table L3.5.3). In contrast, the shares have remained relatively high (above 10 percent) in southern Africa, upper middle-income countries, and the group of countries that have completed only the first-generation NAIP (N10) reflecting, on average, the relatively smaller share of the agriculture sector in the economies of these country groupings (Table L3.5.3).

Conclusions

A series of crises in recent years has threatened Africa's progress toward its agricultural development goals and targets. The COVID-19 pandemic in 2020–2021 and the Russia-Ukraine conflict in 2022 have dealt major blows to a continent that was already facing decelerating economic growth and increases in hunger. After several years of slowing growth, followed by a sharp decline in 2020, GDP per capita growth began to recover in 2021, but trade and price shocks associated with the Russia-Ukraine conflict will likely have a negative impact on economic growth for at least some countries. Like economic growth, progress in terms of food security was faltering even before the pandemic, with increasing rates of undernourishment during the 2014–2019 period, and likely deteriorated further with the onset of COVID-19. Although poverty rates declined moderately throughout the 2003–2019 period, the absolute number of poor people increased over this period. Again, the successive crises are expected to have triggered sharper increases in poverty. Employment has also not recovered after the steep declines associated with the COVID-19 pandemic, with employment rates falling even further in 2021 than in 2020.

All these challenges call for broad and effective social protection programs to help populations better weather protracted and repeated crises, manage loss of employment and price shocks, and protect their food security. African countries should draw from experiences in ramping up social protection programs during the early stages of the COVID-19 pandemic to improve their delivery of social protection in the longer term.

For Africa, agriculture is the most important sector for improving household welfare. It can play a crucial role in poverty reduction and in improving food security and economic well-being. Despite the sector's moderate growth during the review period, the continent has remained well below the CAADP 6 percent annual agricultural growth target. Even for the countries that achieved the 6 percent target, much of the growth can be attributed to factors such as cultivated area expansion rather than to higher productivity levels. In order to have a higher and more sustainable impact in the overall economy, poverty reduction, and improved livelihoods, productivity of the agriculture sector must be improved. This includes improving the productivity of labor and capital, the two main factors of agricultural production.

Despite growth in intra-African agricultural trade, the share of agricultural trade carried out within the continent is relatively low compared to other world regions. As Africa is a net food-importing continent, it is paramount to find a lasting solution to boosting intra-African agricultural trade and fostering improved market integration. In this regard, continued implementation of the African Continental Free Trade Area (AfCFTA) is expected to boost trade within Africa as it aims to address tariff and nontariff trade barriers and other obstacles.

This chapter shows that, on average, growth in the amount of Africa's government agriculture expenditure as well as its share in total government expenditure has been declining. For Africa as a whole, annual average growth in government agriculture expenditure fell from 5.3 percent in 2003–2008 to just 0.1 percent in 2014–2021, while the share of government agriculture expenditure in total government expenditure declined from 3.7 percent in 2003–2008 to 2.5 percent in 2014–2021. Furthermore, in 2014–2021 only four countries—Ethiopia, Malawi, Niger, and Sierra Leone—met or surpassed the CAADP target of allocating 10 percent of the national budget to agriculture. Thus, there is an urgent need to reverse these declining trends by raising the level and shares of government agriculture expenditures, while paying attention to the quality and composition of that spending, if governments are to rapidly increase agricultural growth and reduce rising poverty levels. Moreover, agriculture expenditures will need to be buttressed by good policies and institutions that create an enabling environment for private sector engagement and agricultural transformation.

Regarding implementation processes, the chapter shows that resource constraints at the continental, regional, and national levels have limited capacities for NAIP implementation. Concerted efforts will be required to overcome

these resource and capacity challenges to promote effective implementation of the next generation of NAIPs. Mutual accountability platforms, including the continental BR and national and regional JSRs, offer important opportunities to review progress in implementation of policies and strategies and to monitor their outcomes. The chapter shows that although most countries are not on-track to meet the Malabo Declaration commitments by 2025, countries' capacities to collect and report data for the BR have improved over time, and data systems can be further strengthened through targeted technical support. Due to resource constraints within continental institutions, BR-related activities have become the primary focus of their support in recent years. Yet, the BR has more to offer by evolving into a planning tool to support and boost implementation, rather than a mere performance scoring and comparison mechanism.