



CHAPTER 13

Tracking Key CAADP Indicators and Implementation Processes

Julia Collins, Wondwosen Tefera, and Augustin Wambo Yamdjeu

Introduction

2023 marks two decades since the 2003 launch of the Comprehensive Africa Agriculture Development Programme (CAADP), a continentwide framework for agriculture-led development. The implementation of CAADP has coincided with a period of strong agricultural and economic growth across Africa. CAADP has been credited with galvanizing increased recognition by the international community of the key role agriculture plays in broader economic development on the continent (Benin et al. 2018). After the first decade of implementation, the CAADP agenda was deepened through the 2014 *Malabo Declaration on Accelerated Agricultural Growth and Transformation for Shared Prosperity and Improved Livelihoods* (AUC 2014). Through the Malabo Declaration, African leaders recommitted to the principles and values of CAADP, including evidence-based planning, dialogue, and review, and reaffirmed the original CAADP targets of achieving 6 percent annual agricultural growth and 10 percent of public expenditures being directed to agriculture. The 2014 Declaration further expanded the CAADP commitments to include sharply reducing hunger and poverty, expanding intra-continental trade, building resilience to the adverse effects of climate change, and strengthening mutual accountability for CAADP-focused actions and results to advance agricultural transformation in Africa. The CAADP Biennial Review was designated as the operational tool to monitor the progress of African countries toward achieving these commitments.

Several of the Malabo Declaration targets, including doubling agricultural productivity, halving poverty, and tripling intra-African agricultural trade, have a timeline to achievement by 2025. In 2023, close to a decade after the Malabo Declaration, African leaders began the process of envisioning the next stage of CAADP under a new post-Malabo agenda. As a backdrop to these efforts, it is important to look back on what has been achieved during the first two decades of CAADP implementation.

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 and analysis to facilitate informed 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, at the behest of the African Union Commission (AUC), ReSAKSS led the development of the first monitoring and evaluation framework for assessing CAADP implementation progress and performance (Benin, Johnson, and Omilola 2010). Between 2008 and 2014, ReSAKSS used this framework to track CAADP implementation processes and the performance of AUC member-states in allocating 10 percent of national budgets to the agriculture sector and achieving 6 percent agricultural growth nationally. With the Malabo Declaration broadening 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 the progress of AUC member-states in CAADP implementation, including monitoring their progress toward meeting the Malabo commitments (AUC and NPCA 2015).

The CAADP RF is organized on three levels: outcomes (Level 1), outputs (Level 2), and inputs (Level 3):

- Level 1 centers on the broader development outcomes and impacts to which agriculture contributes. These include wealth creation, food and nutrition security, enhanced economic opportunities, poverty alleviation, shared prosperity, and resilience and sustainability.
- Level 2 considers the outputs from interventions intended to transform the agriculture sector and to achieve inclusive growth. The outputs of interest include improved agricultural production and productivity, increased intra-African trade, more functional agrifood markets, expanded local agro-industry and value chain development that is inclusive of women and youth, more effective management of risks and increased resilience in agricultural livelihoods, and improved management of natural resources for sustainable agriculture.

¹ ReSAKSS is facilitated by AKADEMIYA2063 and works closely with CAADP stakeholders across the continent, as well as with some of the international agricultural research centers of the CGIAR. The ReSAKSS activities discussed in this chapter were carried out in collaboration with the African Union Commission (AUC), 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.

- Level 3 focuses on the inputs and processes required to strengthen systemic capacity to deliver the CAADP results and to create an enabling environment in which agricultural transformation can take place across Africa. These inputs include effective and inclusive policy processes; effective and accountable institutions that regularly assess the quality of implementation of CAADP-related 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 the outcomes of Level 1, 12 for the outputs of Level 2, and 12 for the inputs of Level 3 (Table 13.1).

ReSAKSS has tracked progress on CAADP indicators across the three levels of the RF for 2015–2025 through its flagship Annual Trends and Outlook Report (ATOR) and website (www.resakss.org). The CAADP RF also was designed to help track progress in implementing the seven commitments of the Malabo Declaration. With the launch of the CAADP Biennial Review (BR) process in 2015, additional indicators were formulated for monitoring each of the seven Malabo commitments using the Africa Agriculture Transformation Scorecard. Twenty-four of the BR indicators were drawn directly from the CAADP RF. However, by the third BR cycle of 2021, an additional 23 new indicators had been added, for a total of 47 BR indicators (Table 13.1).

The BR is the paramount continentwide mutual accountability process for Africa’s agriculture sector. It enables AU member states to collectively review their individual and joint progress toward the goals and targets set under the seven Malabo commitments.

However, the CAADP RF is an important complement to the BR process, as its indicators provide additional context for the BR results and its coverage enables a range of analyses across the continent and over time. This chapter reviews progress on CAADP using the CAADP RF indicators. The RF data assembled by ReSAKSS are consistently available for a larger number of countries and for longer time periods than is the case for the BR data. The RF data allow for a broader set of aggregations across countries—such as by economic categories,

TABLE 13.1—CAADP RESULTS FRAMEWORK AND CAADP BIENNIAL REVIEW AND AFRICA AGRICULTURE TRANSFORMATION SCORECARD, NUMBER OF INDICATORS BY LEVEL OR COMMITMENT

CAADP Results Framework	Number of indicators
Level 1: Agriculture’s contribution to economic growth and inclusive development	14
Level 2: Outputs to contribute to agricultural transformation and inclusive growth	12
Level 3: Systemic capacity to deliver results for agricultural transformation	12
Total	38
CAADP Biennial Review and Africa Agriculture Transformation Scorecard	
Commitment 1: CAADP processes and values	3
Commitment 2: Investment finance in agriculture	6
Commitment 3: Ending hunger by 2025	21
Commitment 4: 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	47
Source: Authors based on AUC and NPCA (2015) and AUC (2014).	

regional economic communities, and stage of CAADP implementation—and deeper examinations of trends over time than does the BR data set.

With 47 indicators, the CAADP BR indicators are broader in coverage than the RF indicators. However, there is considerable overlap between the two sets of indicators. ReSAKSS tracks progress on 18 CAADP RF indicators that also are found in the CAADP BR set of indicators (Table 13.2).

Six other indicators overlap between the CAADP RF and the CAADP BR. However, these indicators are not yet included in the ReSAKSS database because the data either 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.

Data gaps in other areas covered under the CAADP RF, particularly on social protection and private sector investment, mean that currently only 27 of the 38 CAADP RF indicators can be tracked (Table 13.2). Although discussions that include the CAADP technical partners and the Biennial Review Technical Working Groups are underway to identify strategies to fill these data gaps, increasing the availability of the missing data is challenging. Resolute efforts by countries and their partners will be necessary to develop and fund comprehensive CAADP data collection processes.

Objectives of the Chapter

In keeping with the role of the ATOR as the official CAADP Monitoring and Evaluation report, this chapter reviews progress in CAADP implementation processes by examining changes in and the current status of the CAADP RF indicators. The assessment presented in this chapter will contribute to the design of the post-Malabo agenda for agriculture-led development in Africa by highlighting the successes and progress made under CAADP as well as the gaps and deficiencies that need to be addressed if future development efforts are to succeed.

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 chapter aims to characterize trends over the entire CAADP period and identify both areas of strong performance and areas where greater attention is required to accelerate progress. The chapter discusses progress across various geographic and economic groupings of African countries, comparing trends during the first five years after the adoption of CAADP (2003–2008) with later subperiods (2008–2014 and 2014–2022). Specific attention is paid to the progress achieved under country and regional efforts to develop Malabo-compliant national agriculture investment plans (NAIPs) and to operationalize CAADP mutual accountability processes through agriculture joint sector reviews (JSR) and the CAADP BR.

TABLE 13.2—CAADP RESULTS FRAMEWORK INDICATORS

LEVEL 1: Agriculture's contribution to economic growth and inclusive development
1. L1.1.1 Gross domestic product (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 five years of age
5. L1.2.2b Prevalence of stunting, (height for age), % of children under five years of age
6. L1.2.2c Prevalence of wasting, (weight for height), % of children under five years of age
7. L1.2.3 Cereal import dependency index
8. L1.3.1 Employment rate
9. L1.3.3 Poverty gap at US\$2.15 a day (2017 PPP)
10. L1.3.4 Extreme poverty headcount ratio at US\$2.15 a day (2017 PPP), % of population
LEVEL 2 Agricultural transformation and sustained inclusive agricultural growth
11. L2.1.1 Agriculture value added, constant 2015 US\$ (million)
12. L2.1.2 Agriculture Production Index (2014 to 2016 = 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 National Agriculture and Food Security Investment Plan (NAFSIP) or National Agriculture Investment Plan (NAIP) 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 successfully undertaken
23. L3.4.3 Cumulative value of investments in public-private partnerships
24. L3.5.1 Government agriculture expenditure, constant 2015 US\$ (billion)
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 operational country Strategic Analysis and Knowledge Support System (SAKSS)

Source: Authors, based on AUC and NPCA (2015).

Note: PPP = purchasing power parity. Shaded cells indicate that the Results Framework indicators are also Biennial Review indicators.

The next section discusses progress in CAADP implementation processes by examining progress on 27 of the 38 CAADP RF indicators for which cross-country data are available (Table 13.2). (Further details on all indicators are available in the data tables in Annexes 1–3 of this report.) The section describes general progress in the CAADP implementation process, while also highlighting the contributions of ReSAKSS, as a technical partner to AUC and AUDA-NEPAD, to the progress achieved.

Progress in CAADP Implementation Processes

Implementation Support

The *Country CAADP Implementation Guidelines under the Malabo Declaration*, developed by the AUC and AUDA-NEPAD (2016), outline four major stages of CAADP implementation at the country level:

- Domestication of the Malabo Declaration,
- Development of a Malabo-compliant NAIP,
- Implementation of the NAIP, and
- Assessment of NAIP implementation progress through an agriculture JSR.

For the first stage, a Malabo domestication event led by AUC, AUDA-NEPAD, and RECs is held to convene national CAADP constituencies to agree on a roadmap toward reviewing the current NAIP, if any, and developing a revised NAIP. Twenty-five African countries have held Malabo Domestication events to date, including nearly all southern African countries and most western African countries (Annex Table L3(a)). In other regions of Africa, the rollout of Malabo domestication events has been less consistent.

To be considered Malabo-compliant, a NAIP should have been assessed through an AU-led independent technical review as being aligned with the goals and targets of the Malabo Declaration and the recommendations from the review mission should have been integrated into the final NAIP document. A total of 36 African countries have developed and validated first-generation NAIPs—that is, either pre-Malabo Declaration NAIPs or NAIPs not assessed as aligned with the Malabo Declaration (Annex Table L3(a)). Three RECs have also developed first-generation Regional Agriculture Investment Plans.

Malabo-compliant NAIPs—also referred to as second-generation NAIPs—as of September 2023, have been developed in 42 countries, including all western African countries and in most countries in the other regions of Africa. ReSAKSS provided analytical support for Malabo-compliant NAIP design in several countries. This included supporting national partners in 31 countries to develop Malabo Status Assessment and Profile reports, which summarize current progress on BR commitment areas, and in 25 countries to draft Malabo Goals and Milestones reports, which identify projected outcomes of alternative agricultural investments.

Progress on Malabo domestication and the development, assessment, and implementation of Malabo-compliant NAIPs has faced challenges at the country, REC, and continental levels. These often have been related to insufficient human capital, technical capacity, or financial resources or to inadequate coordination mechanisms (AUDA-NEPAD 2022, Collins et al. 2022). Finding ways to address these challenges will be vital to the success of the implementation of the post-Malabo agenda for agriculture-led development in Africa.

The CAADP and Malabo Declaration principle of mutual accountability has been operationalized through the twin processes of the BR and agriculture JSRs at national, regional, and continental levels. JSRs provide an inclusive, evidence-based platform for agricultural stakeholders to jointly review progress; hold each other accountable for actions, results, and commitments; and, based on gaps identified, agree on future implementation actions. Because JSRs are the bedrock for inclusive and comprehensive mutual accountability processes, AUC, AUDA-NEPAD, and technical partners, including ReSAKSS, have supported countries and RECs to embed their BR process into national and regional JSR processes. At the request of AUC and AUDA-NEPAD, ReSAKSS has helped to strengthen agriculture JSRs since 2014 by conducting assessments of JSR or JSR-like processes at country and regional levels, completing JSR assessments in 21 countries and in two RECs (Annex Table L3(a)). These JSR assessments evaluate the institutional and policy landscape and the quality of current agricultural review processes and identify areas that need additional strengthening to help countries and RECs develop regular, comprehensive, and inclusive JSR processes.

Biennial Review

AUC tracks the implementation of the Malabo Declaration through the BR process. So far, three BRs have been completed—in 2017 (AUC 2018), 2019 (AUC 2020), and 2021 (AUC 2021). Since mid-2022, AUC and AUDA-NEPAD, in collaboration with partners, including ReSAKSS, have been engaged in the latest CAADP BR reporting process. The fourth BR cycle started in August 2022 with a critical analysis of the last three BRs to identify what worked well in each and what needed to be improved in subsequent BRs (AUC 2023). The critical analysis included technical reviews of each BR by thematic area, including indicators and parameters; the scorecard methodology; data sources; technical guidelines; and the country reporting templates, including the electronic reporting system, the eBR. In preparation for the fourth BR, ReSAKSS contributed to the revision of BR technical guidelines, country reporting templates, and improvements to eBR.

The critical analysis done in the lead-up to the fourth BR brought into the BR process five new performance categories and 12 new indicators in four thematic areas (Table 13.3). The total number of BR performance categories increased to 29 and the number of BR indicators now is 59. In consequence, several new parameters will need to be collected on these new indicators for the fourth BR. As discussed in Chapter 2 of this ATOR, a total of 334 parameters were required to report on the indicators during the third BR of 2021. During the fourth BR cycle, the required number of parameters was further increased.

ReSAKSS has been actively participating in the fourth BR process. ReSAKSS experts took part in training on indicator profiles and BR data quality for all of the Malabo commitment themes and on the use of eBR at continental and REC levels. For their fourth BR preparations, ReSAKSS staff also provided in-depth technical support to 10 countries: Benin, Botswana, Burkina Faso, Kenya, Malawi, Mozambique, Senegal, Togo, Uganda, and Zimbabwe. ReSAKSS also supported regional and continental data validation for the fourth BR by reviewing the national BR data reports submitted by member states. Moreover, ReSAKSS has been actively participating in writeshops to draft the continental report for the fourth CAADP BR. In early 2024, AUC will release the fourth BR report together with the African Agriculture Transformation Scorecard.

In addition, drawing on the third BR report of 2021, AKADEMIYA2063 so far has published 17 BR briefs covering Africa as a whole, several RECs, and a dozen countries. These were prepared in collaboration with country and regional CAADP focal persons. The briefs highlight the performance of the continent, REC, or country as documented through the 2021 BR and discuss the policy actions that will be required for the continent, REC, or country in question to meet the Malabo Declaration commitments by 2025.

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. Data on the 27 indicators are presented in Annexes 1 to 3. Progress on the quantitative indicators is presented at the aggregate level for seven different groupings:

- Africa as a whole
- AU's five geographic regions—central, eastern, northern, southern, and western
- Five economic categories—low-income countries with less favorable agricultural conditions, low-income countries with more favorable agricultural

TABLE 13.3—NUMBER OF NEW PERFORMANCE CATEGORIES AND NEW INDICATORS, BY MALABO COMMITMENT

Malabo commitment	New performance categories, number	New indicators, number
Commitment 1: CAADP processes and values	-	-
Commitment 2: Investment finance in agriculture	-	-
Commitment 3: Ending hunger by 2025	1	5
Commitment 4: Halving poverty by 2025	-	-
Commitment 5: Boosting intra-African trade in agricultural commodities and services	1	4
Commitment 6: Enhancing resilience to climate variability	1	1
Commitment 7: Mutual accountability for results and actions	2	2
Total	5	12

Source: AUC (2023).

conditions, mineral-rich low-income countries, lower middle-income countries, and upper middle-income countries²

- Eight RECs—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)
- By the period during which the country signed the CAADP compact—CC0, CC1, CC2, and CC3³
- By the level or stage of CAADP implementation reached by the country by the end of 2015—CL0, CL1, CL2, CL3, and CL4⁴
- By whether the country has formulated a first- or second-generation NAIPs—N00, N10, N01, and N11⁵

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 Annexes 1 to 3. The discussion 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 2014–2022.⁶ 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 to individual countries within the categories—for example, the measures reported relate, for example, 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 under the CAADP process may differ across the continent, without inference of causality.

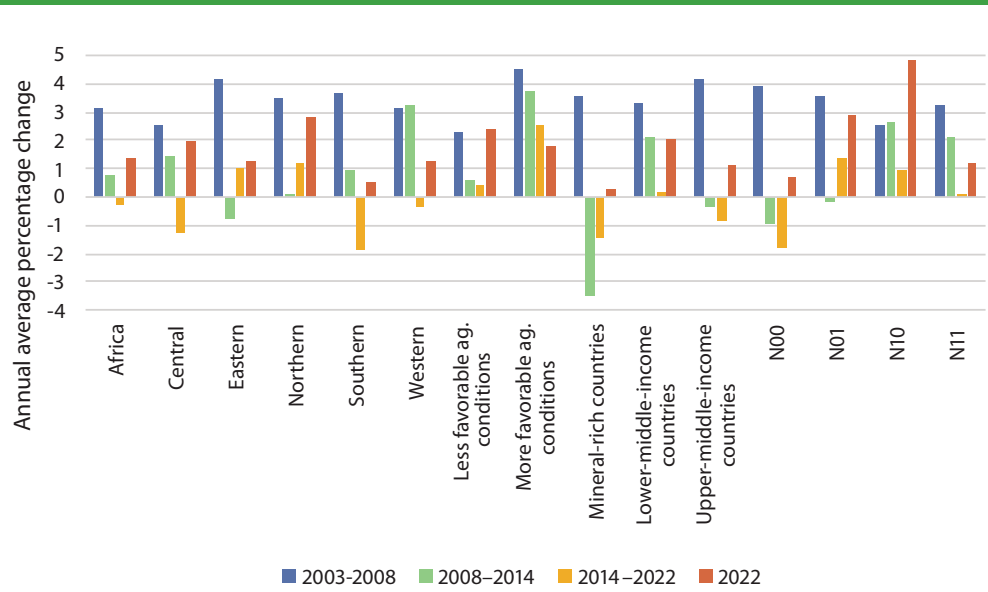
CAADP Results Framework Outcome (Level 1) Indicators: Agriculture's Contribution to Economic Growth and Inclusive Development

Wealth Creation

The launch of CAADP coincided with strong and widespread economic growth in Africa that began in the early 2000s. However, the rapid growth of the 2000s slowed during the 2010s. The COVID-19 crisis between 2020 and 2022 and the Russia-Ukraine war starting in 2022 both presented major challenges to maintaining positive economic progress. As shown in Figure 13.1, Africa's GDP per capita increased by an annual average of 3.2 percent during the 2003–2008 period,

-
- 2 The five economic categories are exclusive, with countries first classified as low-income, lower middle-income, and higher middle-income. Low-income countries are then classified as having more or less favorable agricultural conditions. Then, countries with more favorable agricultural conditions are classified as mineral-rich or not. See Benin et al. (2010) for a description of the categorization methodology and the criteria used for classifying countries based on income, favorability of agricultural conditions, and mineral wealth.
 - 3 CC0 = group of countries that have not signed a CAADP compact; CC1 = group of countries that signed the compact in the period 2007 to 2009; CC2 = group of countries that signed the compact between 2010 and 2012; CC3 = group of countries that signed the compact between 2013 and 2015.
 - 4 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 an important step in CAADP implementation, as countries that have secured external funding are expected to be better able to implement NAIPs and other agricultural investments (Benin 2016).
 - 5 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 for a country can be considered second-generation even if the country does not have a pre-Malabo Declaration, first-generation NAIP. Such countries are in country category N01.
 - 6 Considering that CAADP was launched in 2003, renewed in 2008, and renewed again in 2014 with the Malabo Declaration, the years 2003, 2008, and 2014 represent important CAADP milestones. Therefore, the post-CAADP subperiods for reporting on progress use overlapping years to reflect that these milestones usually occurred in June in the middle of the year—that is, 2003 to 2008, 2008 to 2014, and 2014 to 2022.

FIGURE 13.1—GROSS DOMESTIC PRODUCT PER CAPITA, CONSTANT 2015 US DOLLARS, ANNUAL AVERAGE PERCENTAGE CHANGE, 2003–2022



Source: ReSAKSS based on World Bank (2023) and ILO (2023a)

Note: N00, N01, N10, and N11 categories refer to the presence or absence of first- and second-generation national agriculture investment plans (see footnote 5).

but growth slowed to 0.7 percent on average during the 2008–2014 period. Per capita GDP growth turned negative during the next period, with average incomes declining by an average of 0.2 percent per year during 2014–2022, with a sizable contraction in economies at the onset of the COVID-19 pandemic in 2020 as well as slow growth or slight declines in years before the pandemic.

Incomes have begun to recover since the height of the pandemic, with GDP per capita increasing by 1.4 percent in 2021 and 2022. However, GDP per capita levels had not yet recovered in 2022 to their levels before the pandemic, being only moderately higher than their levels two decades prior—US\$1,971 in 2022 on average compared with US\$1,640 in 2003 (Annex Table L.1.1.1).⁷

The strongest growth in GDP per capita for most of the country groupings is seen during the period from 2003 to 2008, with decelerating or negative growth

thereafter. However, several country groupings maintained positive growth throughout the CAADP period with no periods of economic contraction. These include northern Africa, lower income countries with less favorable agricultural conditions, lower income countries with more favorable agricultural conditions, and lower middle-income countries. In addition, countries that developed a first-generation NAIP (the N10 and N11 countries) avoided growth declines. In contrast, the largest declines in GDP per capita during the period from 2014 to 2022 were seen in the southern African countries (-1.8 percent) and countries with neither a first- nor a second-generation NAIP (N00 countries, -1.8 percent). Mineral-rich countries had negative per capita GDP growth both during the period from 2008 to 2014 (-3.4 percent) and from 2014 to 2022 (-1.4 percent).

The level of GDP per capita differs markedly between regions (Annex Table L.1.1.1). Average incomes in Central Africa in 2022 were less than half the continental average, at US\$821, while in Northern Africa they were around twice the average at US\$3,950. Western Africa was the geographic region with the largest growth in GDP per capita over the entire CAADP implementation period to date with a nearly 40 percent increase in GDP per capita between 2003 (US\$1,345) and 2022 (US\$1,868).

Household consumption expenditure measures household spending on goods and services. As with GDP per capita, annual household consumption expenditure per capita grew relatively rapidly for Africa as a whole between 2003 and 2008, increased more slowly between 2008 and 2014, and has fallen moderately since 2014 (Figure 13.2, Annex Table L1.1.2)., household spending dipped more noticeably in 2020, reflecting the adverse economic effects of the COVID-19 pandemic and remained close to the 2020 level for the next two years. Among the geographic regions, only eastern Africa and northern Africa showed positive growth during the period from 2014 to 2022—very moderate for eastern Africa and somewhat stronger for northern Africa (Annex Table L1.1.2). Northern Africa showed the strongest overall growth in per capita household spending over the entire CAADP period, increasing from US\$1,679 in 2003 to US\$2,665 in 2022. Increases were more muted in other regions, while southern Africa experienced an overall decrease in annual household consumption expenditure per capita between 2003 and 2022.

⁷ Unless otherwise stated, all monetary values reported have been converted into constant 2015 US dollar prices for intertemporal and cross-country or cross-category comparisons.

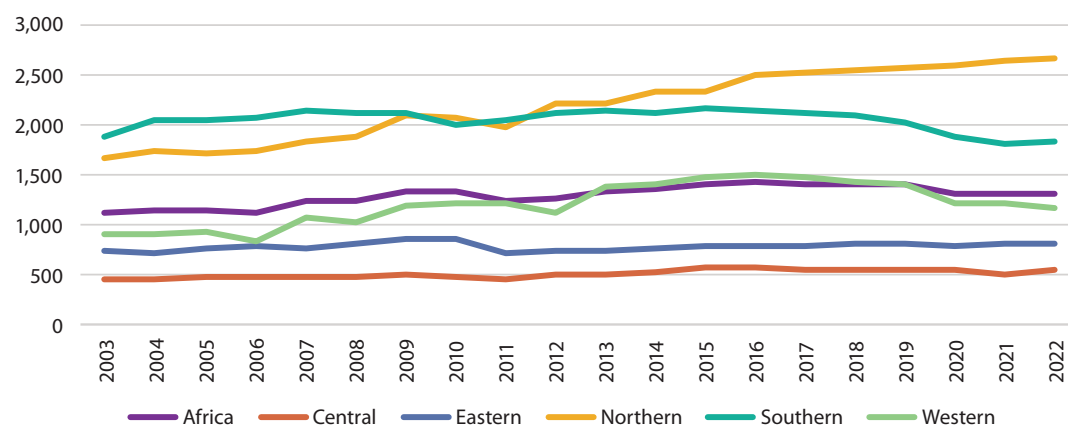
Food and Nutrition Security

Slowing economic growth and successive economic crises have had significant impacts on food and nutrition security in Africa. The prevalence of undernourishment, which measures the proportion of the population with caloric intake below the minimum dietary energy requirement, declined steadily through the early CAADP periods, but showed large annual increases of 3.8 percent between 2014 and 2021 (Figure 13.3, Annex Table L.1.2.1). The COVID-19 pandemic contributed to increases in 2020 and 2021, but undernourishment had already been rising since the mid-2010s in Africa as a continent and in most country groupings (Tefera, Collins, and Makombe 2021). In 2021, the last year with available data, the prevalence of undernourishment stood at 19.7 percent for Africa as a whole, only slightly lower than the prevalence at the 2003 launch of CAADP of 21.6 percent (Annex Table L.1.2.1).

Nearly all of the country groupings examined show similar patterns in undernourishment over time, with declining rates during the periods from 2003 to 2008 and from 2008 to 2014, but rising rates thereafter. Exceptions include upper middle-income countries—which showed increases during all three time periods—and western Africa and countries that developed a first-generation but not a second-generation NAIP (N10 countries)—these two country groups showed a rising prevalence of undernourishment already during the period from 2008 to 2014.⁸ Increasing undernourishment in the period from 2014 to 2021 was widespread, affecting every country grouping examined. However, countries with neither a first- nor a second-generation NAIP (N00 countries) showed the highest annual increase in undernourishment during this period of 7.6 percent. As of 2021, by country group, the prevalence of

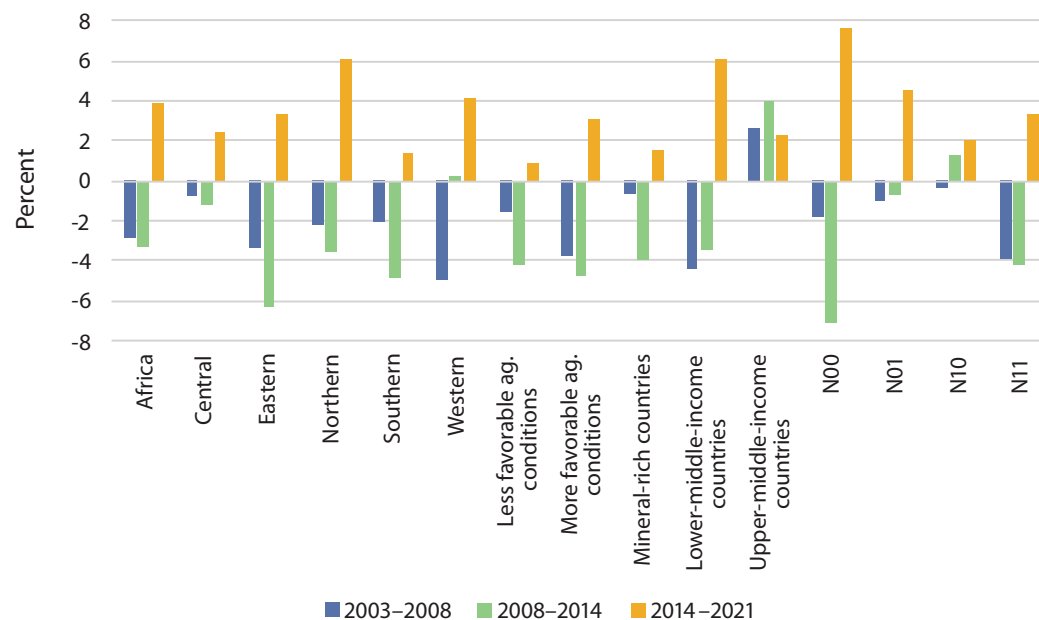
⁸ It should be noted that only eight African countries fall into the upper middle-income category (see Annex 4); country-specific factors may explain the rising hunger levels in this group. For example, in South Africa, declining food security during the early 2010s despite adequate food availability in the aggregate has been attributed to high food price inflation and high unemployment (Nenguda and Scholes 2022, Oxfam 2014).

FIGURE 13.2—ANNUAL HOUSEHOLD CONSUMPTION EXPENDITURE PER CAPITA, CONSTANT 2015 US DOLLARS, 2003–2022



Source: ReSAKSS based on World Bank (2023) and ILO (2023a).

FIGURE 13.3—PREVALENCE OF UNDERNOURISHMENT, ANNUAL AVERAGE PERCENTAGE CHANGE, 2003–2021



Source: ReSAKSS based on FAO (2023), World Bank (2023), and ILO (2023a).

Note: N00, N01, N10, and N11 categories refer to the presence or absence of first- and second-generation national agriculture investment plans (see footnote 5).

undernourishment was highest in N10 countries at nearly 35 percent, followed by countries in central Africa at close to 30 percent. Despite the consistent rises in undernourishment in upper middle-income countries, this group still had among the lowest prevalences as of 2021 at 8.8 percent. By region, northern African countries had the lowest undernourishment rate of 6.4 percent.

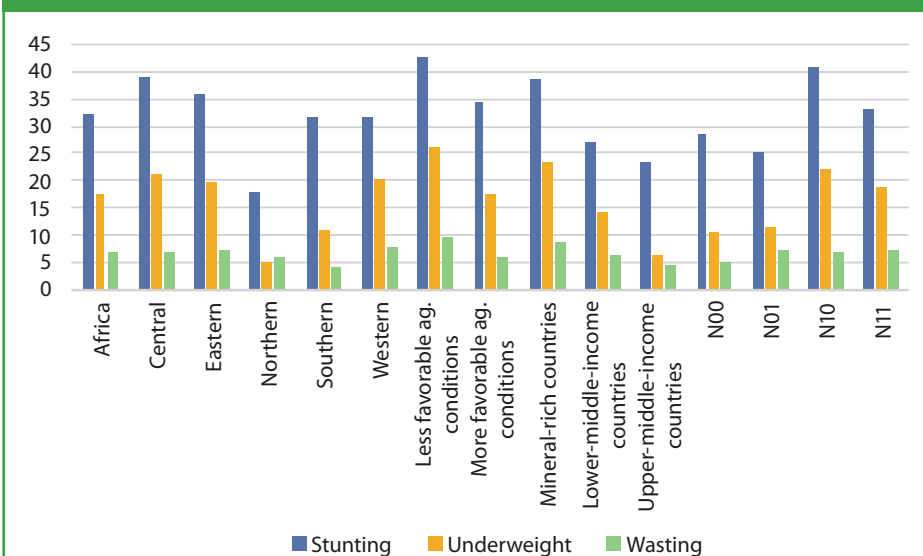
Figure 13.4 shows average prevalences during the period from 2014 to 2021 of three key measures of undernutrition in children under five years of age: stunting, or low height for age; underweight, or low weight for age; and wasting, or low weight for height.

- At the continental level, stunting, a measure of chronic child malnutrition, affected nearly a third of children under five (32 percent) in 2014–2021, with even higher rates in central Africa, low-income countries with less favorable agricultural conditions, and countries with only a first-generation NAIP (N10).
- The continental prevalence of child underweight was 17 percent during the same period, with similar patterns as stunting among country groups—the highest rates were found in central Africa, low-income countries with less favorable agricultural conditions, low-income mineral-rich countries, and N10 countries.
- For wasting, a measure of acute child malnutrition, the pattern differed slightly, with the highest rates in western Africa, low-income countries with less favorable agricultural conditions, low-income mineral-rich countries, and countries with only a second-generation NAIP. The continental average was 7 percent in the period between 2014 and 2021.

Upper middle-income countries had among the lowest rates for all three measures of child undernutrition. Northern Africa had the lowest rates for stunting and underweight, while southern Africa had relatively low rates for underweight and wasting.

Although child malnutrition remains worryingly high, its prevalence has decreased steadily throughout the CAADP period. At the continental level, each indicator showed annual average declines of between 1.0 and 2.5 percent during all three periods. Nearly all country groupings showed consistent reductions in child malnutrition as well. Exceptions to this general pattern were seen in the countries of northern Africa and in the N01 group—in both of which stunting

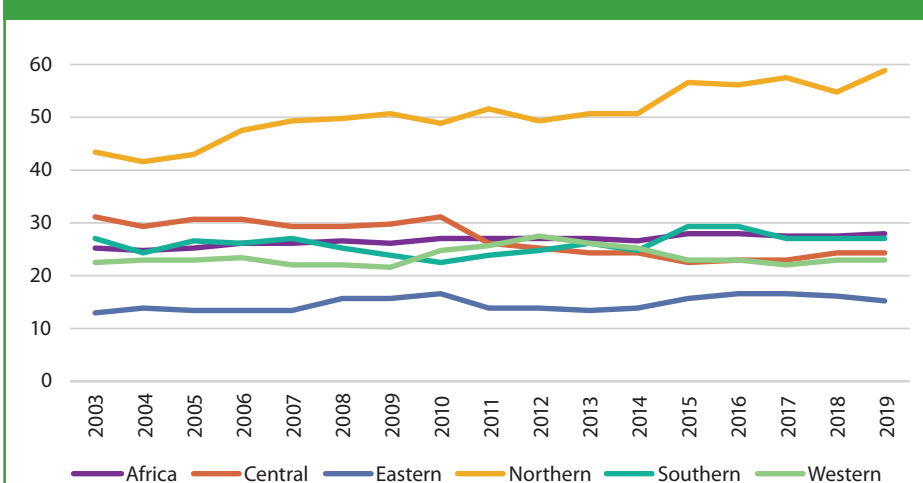
FIGURE 13.4—PREVALENCE OF UNDERWEIGHT, STUNTING, AND WASTING IN AFRICA, PERCENTAGE OF CHILDREN YOUNGER THAN FIVE YEARS, 2014–2021 AVERAGE



Source: ReSAKSS based on World Bank (2023) and ILO (2023a).

Note: N00, N01, N10, and N11 categories refer to the presence or absence of first- and second-generation national agriculture investment plans (see footnote 5).

FIGURE 13.5—CEREAL IMPORT DEPENDENCY RATIO, PERCENT OF TOTAL DOMESTIC CEREAL SUPPLY, 2003–2019



Source: ReSAKSS based on FAO (2023), World Bank (2023) and ILO (2023a).

FIGURE 13.6—EMPLOYMENT RATE, PERCENT OF LABOR FORCE AGED 15 TO 64 YEARS, ANNUAL AVERAGE PERCENTAGE CHANGE, 2003–2022



Source: ReSAKSS based on ILO (2023a).

Note: N00, N01, N10, and N11 categories refer to the presence or absence of first- and second-generation national agriculture investment plans (see footnote 5).

rose during the 2003–2008 period and wasting rose during both the 2003–2008 and 2008–2014 periods.

The cereal import dependency ratio, calculated as the share of cereal imports in total domestic cereal supply, reflects the degree of a country’s dependence on world markets for food supplies. While engaging in global trade is an important component of national food security strategies, a high degree of dependence on global markets also exposes countries to international trade and supply shocks. This risk was demonstrated by the inflationary impacts in many African countries of global cereal market disruptions related to the start of the Russia-Ukraine war in 2022. As shown in Figure 13.5, average cereal import dependency in Africa has increased slightly over the entire CAADP period, rising from 25 percent in 2003 to 28 percent in 2019. Central, southern, and western Africa had cereal import dependency ratios close to the continental average, while eastern Africa had the lowest ratio at under 20 percent throughout the CAADP period. Northern Africa has a markedly higher dependency on cereal imports

than other regions, and also showed the fastest increase in the dependency ratio, rising from 43 percent in 2003 to 59 percent in 2019.

Employment

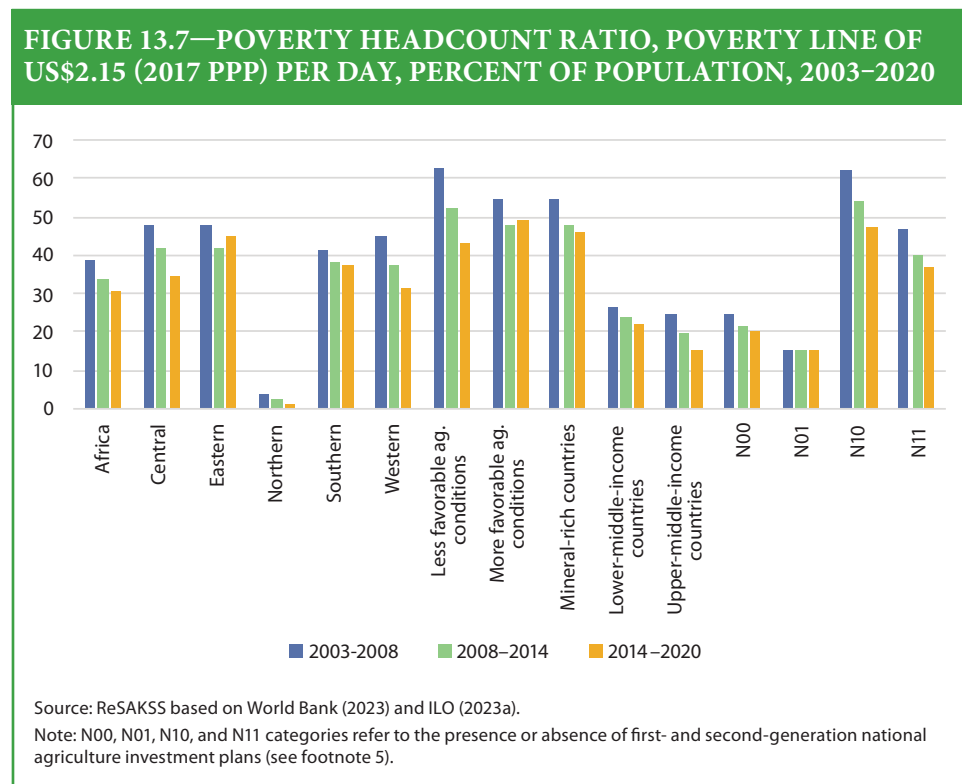
Africa’s employment rate, measured either as a share of the labor force (Figure 13.6, Annex Table L1.3.1A) or as a share of the entire population aged 15 to 64 years (Annex Table L1.3.1B), rose during the period from 2003 to 2008 but declined slightly in subsequent periods. The decline in employment rates deepened in 2020, as the COVID-19 pandemic had severe repercussions on economic activity in general. These declines continued in 2021, due to continued impacts of the pandemic as well as continuing growth in the labor force (Collins et al. 2022, ILO 2022). As shown in Figure 13.6, this trend ended in 2022, during which a slight increase of 0.1 percent in the employment rate as a share of the labor force was registered for Africa as a whole. The increase in the employment rate was more sizable in northern Africa and in countries that formulated a second-generation but not a first-generation NAIP (N01). In contrast, the employment rate continued to fall in southern Africa, countries with neither a first- nor a second-generation NAIP (N00), and upper middle-income countries. The decline in the last group was especially large at over 1.0 percent.

Overall, 93 percent of Africa’s labor force was employed in 2022, almost the same as the 2003 rate (Annex Table L1.3.1A). Employment rates are lowest in the set of country groups that experienced continued declines in their employment rate into 2022: southern Africa, upper middle-income countries, and N00 countries. For upper middle-income countries, the relatively low employment rate in 2022 reflects a decline of 7 percentage points from its 2003 level. Employment rates of 95 percent or more are found in western Africa and low-income countries with more favorable agricultural conditions.

It should be noted that Africa’s generally high employment rate masks significant shares of underemployment and informal employment (Merotto, Weber, and Aterido 2018). The International Labour Organization reports that 85 percent of Africa’s employment in 2022 was informal, with notably higher informality among women (88 percent) than men (82 percent). The share of self-employed workers is also high, at 69 percent of all employment in 2021, the last year with available data. The informality rate has increased slightly since 2010, but the self-employment rate declined between 2010 and 2019, before rising slightly in 2020 with the advent of the COVID-19 pandemic (ILO 2023b).

Poverty

The extreme poverty headcount ratio, or the share of the population living on less than US\$2.15 (2017 PPP) per day, showed a steady if moderate decline throughout the CAADP period for Africa as a whole and for most country groupings (Figure 13.7, Annex Table L1.3.4). However, a few country groupings—eastern Africa and low-income countries with more favorable agricultural conditions—showed an increased prevalence of poverty between 2014 and 2020 compared with the previous period between 2008 and 2014. At the continental level, the extreme poverty headcount rate declined from an average of 39 percent during the period from 2003 to 2008 period to 34 percent between 2008 and 2014 and further fell to 31 percent between 2014 and 2020, reaching 30 percent in 2020, the most recent year with available data. Country groups with the highest poverty prevalence levels in the 2014 to 2020 period included eastern Africa, low-income countries with more favorable agricultural conditions, mineral-rich low-income



countries, and countries with a first-generation but not a second-generation NAIP. By far, the lowest extreme poverty headcount rate in the 2014 to 2020 period was in northern Africa.

At the continental level, the extreme poverty headcount rate declined by an annual average of 2.2 percent between 2003 and 2008 and by 2.3 percent between 2008 and 2014. Progress in poverty reduction decelerated between 2014 and 2020, with an annual average decline of 1.2 percent registered. Among geographic regions, several showed more robust reduction in extreme poverty levels in the most recent period, including northern Africa, with an annual average decline of 9.1 percent in the extreme poverty headcount, albeit from a low poverty rate to start with, and western and central Africa, both with declines of over 3 percent. However, eastern Africa's extreme poverty headcount rate increased by an annual average of 2.7 percent, representing a reversal of earlier progress.

Overall, progress in reducing extreme poverty has been steady but moderate at the continental level, with mixed progress among geographic regions and other country groupings. However, the general reduction in the extreme poverty headcount ratio has not been sufficient to reduce the total number of people living in extreme poverty in Africa, which continued to rise throughout the CAADP period (Collins et al. 2022). The likelihood of accelerating poverty reduction in the coming years is uncertain, as Africa continues to deal with repercussions of recent economic shocks and continued high inflation rates related to the Russia-Ukraine war and other factors.

The extreme poverty gap measures the severity of poverty and is calculated by the average distance between the incomes of the poor and the international extreme poverty line of US\$2.15/day (2017 PPP). For Africa as a whole and for most country groupings, the extreme poverty gap declined steadily throughout the CAADP period, indicating that, in addition to a decline in the prevalence of extreme poverty (Figure 13.7), the average depth of extreme poverty has also decreased—the severity of destitution among the extreme poor has diminished. For Africa as a whole, the extreme poverty gap shrank by an annual average of 3.2 percent during the period from 2003 to 2008 and by 3.9 percent between 2008 and 2014 (Annex Table L.1.3.3). Progress in reducing the depth of extreme poverty decelerated between 2014 and 2020 (the last year with available data), with an annual average decrease in the extreme poverty gap of 1.3 percent. This reflects an uptick in the severity of poverty with the onset of the COVID-19 pandemic in 2020.

While the consistent progress in reducing the depth of extreme poverty before the pandemic offered hope, it is unclear how soon this progress will resume, given the severe food price inflation related to the Russia-Ukraine war and its expected continuing adverse impacts on the consumption levels of African households. Among country groupings, northern Africa shows the lowest extreme poverty gap—less than half a percent as of 2020—while the largest poverty gaps of over 20 percent are found in mineral-rich countries. Of the geographic regions, eastern Africa and southern Africa have the largest poverty gaps. The extreme poverty gap for Africa as a whole stood at 10.1 percent in 2020.

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

Agricultural Production and Productivity

For the economies in Africa, agriculture is an important sector—15 percent of the continent’s GDP is produced from agriculture and the sector employs more than half of the working population (ReSAKSS 2023). Agriculture value added in Africa grew consistently over the past two decades, rising significantly from US\$256 billion in the period from 2003 to 2008 to US\$415 billion in 2022 (Figure 13.8). This represents a 65 percent increase during the CAADP period. Looking at performance at the regional level, western Africa dominates Africa’s agricultural production. Moreover, the agriculture sector in western Africa consistently grew at a higher pace compared to other subregions between 2003 and 2022.

Forty-two percent of Africa’s total agriculture value added for the period 2014 to 2022 was produced in western Africa followed by eastern Africa and northern Africa at 24 percent and 22 percent, respectively (Figure 13.9). Lower middle-income countries accounted for 65 percent of the continent’s agricultural value addition over this period, while lower-income countries with more favorable agricultural conditions accounted for 18 percent. Considering country groups based on progress in formulating NAIPs, the countries that have formulated both first- and second-generation NAIPs (N11) account for 69 percent of all agricultural value addition. This breakdown of the source of agricultural production by value in Africa demonstrates that agriculture value addition is concentrated in a few subgroups of countries.

FIGURE 13.8—AFRICAN AGRICULTURE, AVERAGE ANNUAL VALUE ADDED, US\$ BILLIONS (CONSTANT 2015 US\$), BY TIME PERIOD AND GEOGRAPHIC REGION

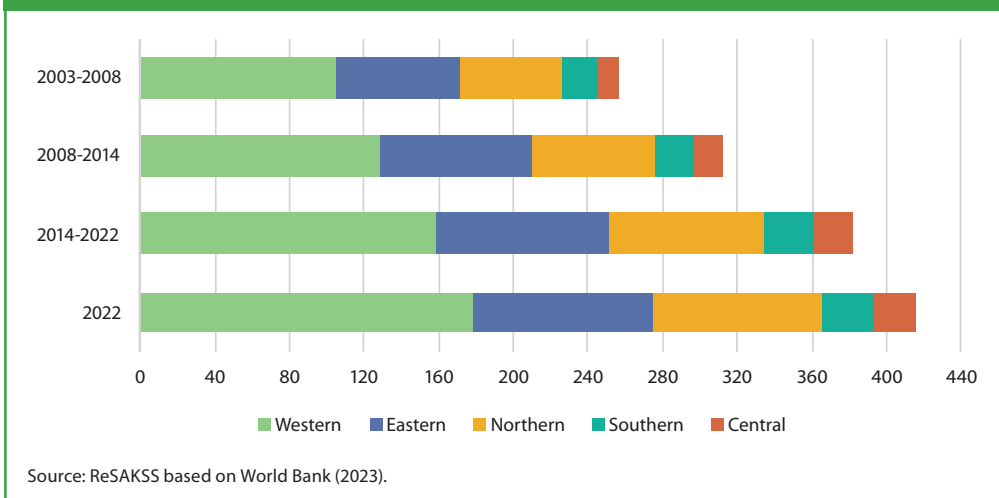
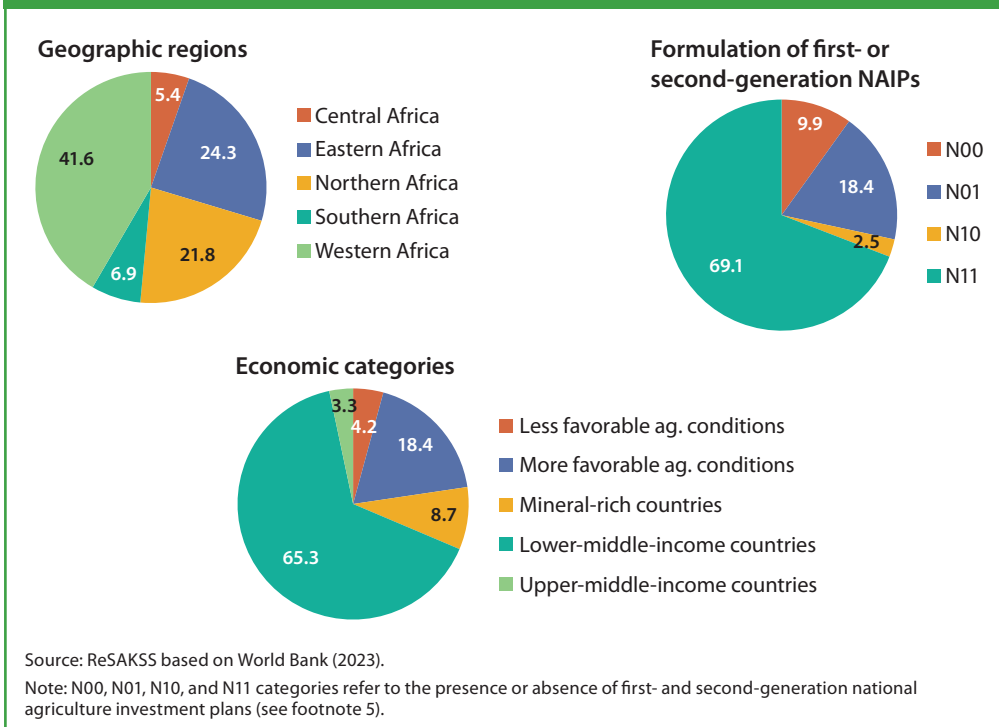
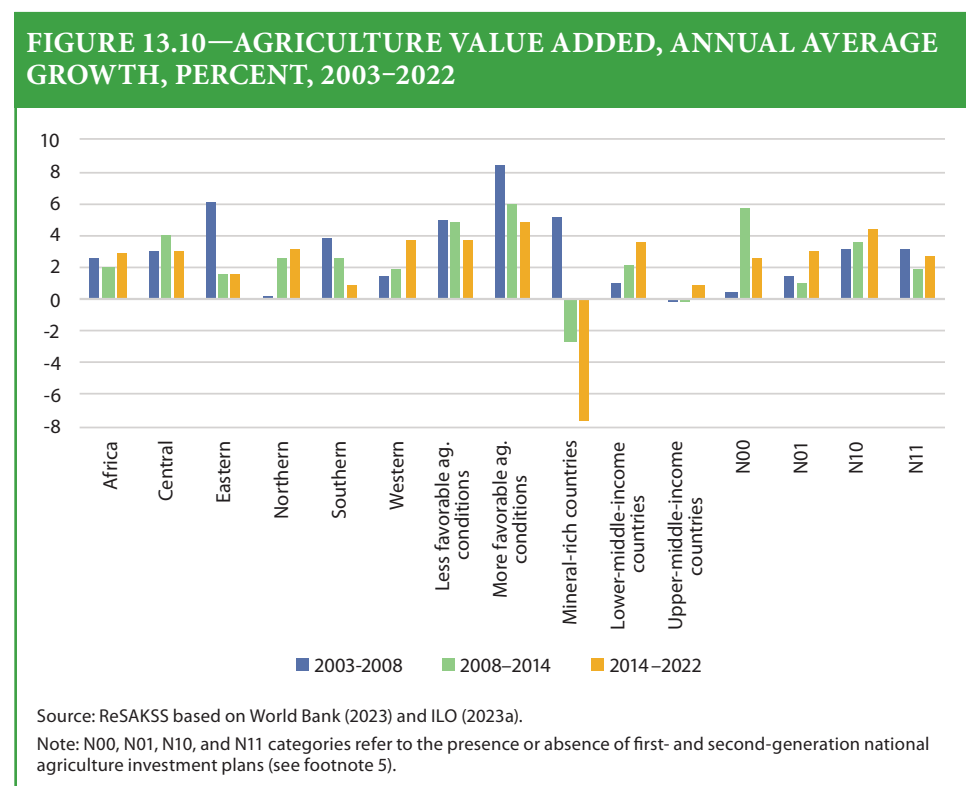


FIGURE 13.9—AGRICULTURE VALUE ADDED, AVERAGE PERCENTAGE SHARE OF AFRICA’S TOTAL AGRICULTURE VALUE ADDITION FOR PERIOD FROM 2014 TO 2022, BY COUNTRY GROUPING



For Africa as a whole, growth in agriculture value addition remained modest throughout the CAADP period (Figure 13.10). Continentwide, it grew by 2.6 percent on average during the period from 2003 to 2008. Average growth rates fell between 2008 and 2014 to 2.1 percent, before recovering, if still at a low rate, to 2.8 percent between 2014 and 2022. At the country subgroup level, the most consistent growth in agriculture value addition over the entire CAADP period was seen among lower-income countries with more favorable agriculture conditions.

Except for the growth in agriculture value addition between 2003 and 2008 for eastern Africa and for lower-income countries with more favorable agricultural conditions, the CAADP 6 percent agricultural sector annual growth target was not met by any country subgroups over any subperiod across the entire CAAD implementation period. Negative growth rates in agricultural value addition were seen in some subperiods both for mineral-rich countries and for upper middle-income countries (Figure 13.10).



Only Ethiopia and Rwanda were able to record annual growth in agricultural value addition higher than the CAADP target of 6 percent in both the 2008 to 2014 period and the 2014 to 2022 period (Figure 13.11). However, several countries met the target in one, but not both, periods—Algeria, Angola, Côte d’Ivoire, Equatorial Guinea, Gabon, Guinea, Kenya, Mali, Niger, Sao Tome and Principe, Senegal, Sierra Leone, and Tanzania.

Agricultural labor productivity measured by agriculture value added per worker grew for Africa as a whole from US\$1,460 on average annually between 2003 and 2008 to US\$1,605 between 2008 and 2014 and further to US\$1,796 between 2014 and 2022. As shown in Annex Table L2.1.3 and Figure 13.12 (left panel), there is significant variation in agricultural labor productivity across the different country subgroups. Agricultural labor productivity over the entire CAADP period was highest at more than US\$4,000 annually on average for the northern Africa region, upper middle-income countries, and the group of countries that have not yet formulated both NAIPs (N00). On the other hand, labor productivity was the lowest in central Africa and in the countries that had formulated the first-generation NAIP only (N10)—countries in these groups had average agricultural labor productivity levels of less than US\$650 throughout the whole CAADP period.

As a measure of agricultural land productivity, agriculture value added per hectare of arable land for Africa as a whole was on average US\$244 during the early CAADP period from 2003 to 2008 (Figure 13.12, right panel). Land productivity increased to US\$294 in the 2008 to 2014 period and further to US\$357 between 2014 and 2022. The northern and western regions of Africa, lower middle-income countries, the countries that joined the CAADP process early, and the groups of countries that have advanced in the CAADP implementation and formulated their second-generation NAIP recorded higher land productivity throughout the review period. Land productivity remained lowest in southern Africa and in upper middle-income countries (Annex Table L2.1.4).

For Africa as a whole, five commodities account for close to a third of total agricultural production—cassava, maize, yam, cattle meat, and milk. Combined, these commodities made up on average 29 percent of all agricultural value addition on the continent over the entire CAADP implementation period from 2003 to 2021. Except for milk, yields for the other major commodities were higher in the early CAADP period from 2003

to 2008 than later. While maize yield growth remained positive throughout the CAADP implementation period, for the other major agricultural commodities, yield growth was not consistent particularly during the period from 2008 to 2014 during which negative annual yield growth was recorded for cassava, yam, and cattle meat (Annex Tables L2.1.5A, L2.1.5B, L2.1.5C, L2.1.5D, L2.1.5E). For all five of the major commodities, average annual yields during the period from 2014 to 2022 were better than for the period from 2008 to 2014. However, for most of these commodities, lower yields were recorded in the period from 2014 to 2022 on average than during the 2003 to 2008 period.

Intra-African Agricultural Trade

Intra-African agricultural trade rose steadily throughout the CAADP period. Between 2003 and 2022, the annual value of intra-African agricultural exports rose from US\$5.7 billion to US\$16.2 billion, an increase of over 180 percent in the last two decades. During the early CAADP period from 2003 to 2008, intra-African agricultural exports grew by 8 percent annually on average. The average annual growth in such exports between 2008 and 2014 was similar at 9 percent. However, this export growth trend slowed considerably between 2014 and 2022 with a growth rate of 3 percent, largely due to contractions in exports from Southern Africa (Annex Table L2.2.1A).

Notable variation was observed in the share of export trade among the different subgroups (Figure 13.13). Southern Africa dominates intra-African agricultural exports, making up a 44 percent share of all such exports, while central Africa is least involved in such trade, making up less than 1 percent. Likewise, lower middle-income countries and the group of countries that formulated both first- and second-generation NAIPs (N11) are the major players in intra-African agricultural export trade.

At the country level, South Africa is the largest exporter of agricultural goods within Africa, accounting for 24 percent of all such trade between 2014 and 2022, followed by Egypt (7 percent) and Uganda (6 percent). Another six countries each accounted for

FIGURE 13.11—NATIONAL AGRICULTURAL VALUE ADDED, ANNUAL AVERAGE GROWTH, PERCENT, BY TIME PERIOD

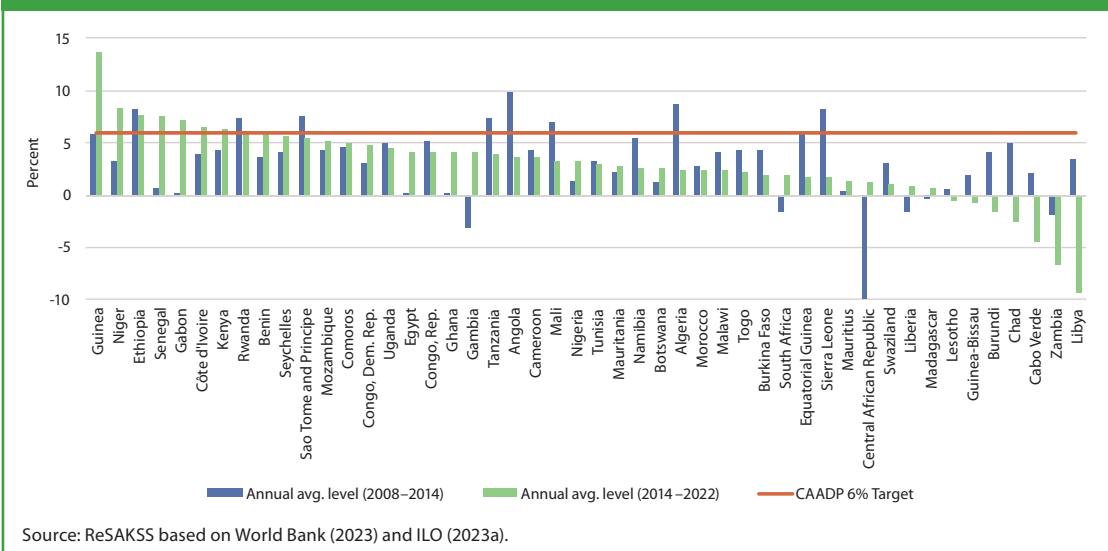


FIGURE 13.12—AGRICULTURAL LABOR (LEFT PANEL) AND AGRICULTURAL LAND (RIGHT PANEL) PRODUCTIVITY IN AFRICA, US\$ (CONSTANT 2015 US\$), BY TIME PERIOD

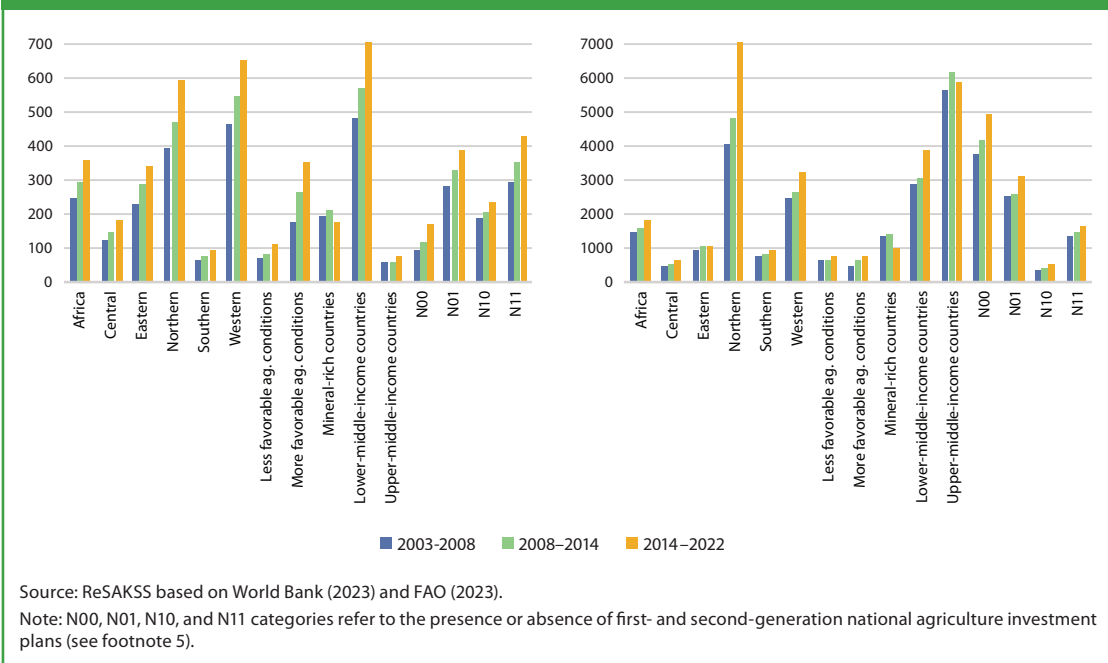
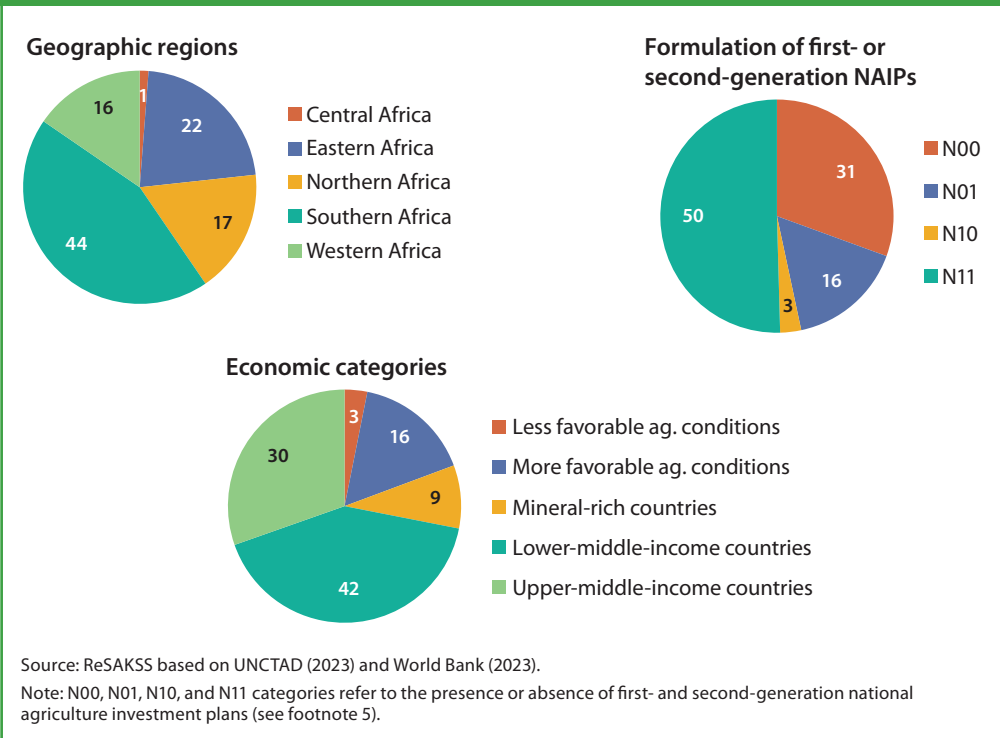


FIGURE 13.13—INTRA-AFRICAN AGRICULTURAL EXPORTS, PERCENTAGE SHARE OF TOTAL INTRA-AFRICAN AGRICULTURAL EXPORTS FOR PERIOD FROM 2014 TO 2022, BY COUNTRY GROUPING



between 4 and 5 percent of all intra-African agricultural trade during the same period (ReSAKSS 2023).

Turning from exports to imports, intra-African imports grew from an annual average of US\$8 billion recorded in the period from 2003 to 2008 to US\$12 billion between 2008 and 2014 and further to US\$15 billion in the period from 2014 to 2022. Growth in imports was the highest in the period from 2008 to 2014 with a 5.6 percent annual average growth rate, while it was between 3.1 and 3.3 percent annually on average in the other CAADP subperiods (Annex Table L2.2.1B). Similar growth trends in imports from elsewhere in Africa were observed among the different country subgroups. The largest intra-Africa exporters include countries in the southern Africa region, middle-income countries, and the countries that have formulated both generations of NAIP (N11). In contrast, imports from other African countries were lowest among countries in the central Africa region, lower-income countries with less favorable

agricultural conditions, and the group of countries that have formulated only the first-generation NAIP (N10)—all of these categories of countries account for less than 10 percent of all intra-African imports. The top three countries accounting for the largest share of total intra-African agricultural imports are South Africa at 7.9 percent of all such imports, Zimbabwe at 6.4 percent, and Namibia at 5.2 percent. Despite the presence of notable increases in intra-African agricultural imports, imports from other countries in Africa make up a small share of all agricultural imports of African countries—less than a fifth come from other countries on the continent (FAO and AUC 2021).

The fifth commitment under the 2014 Malabo Declaration aims at tripling intra-African trade in agricultural commodities and services by the year 2025 (AUC 2014). Achieving this commitment by 2025 remains a challenge. Trends show that Africa was able to increase its intra-African trade only by just over 25 percent between 2014 and 2022. The third BR report shows that Africa is not on track to achieve the commitment of boosting intra-African trade three-fold by 2025 (AUC 2022).

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

Capacities for Agriculture and Food-Security Policy Design and Implementation

Progress in the implementation of actions to strengthen systemic capacity for agriculture and food-security policy planning and implementation under CAADP is presented in Annex Table L3(b). As of September 2023:

- 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 agricultural sector working groups; and
- 22 had successfully undertaken agriculture-related public-private partnerships to boost specific agricultural value chains.

It should be noted that these figures are based on countries' self-reporting or the assessment of country experts. Determining the values for several of these measures required subjective judgments on the quality of capacities and processes, so they may be subject to change.

Government Expenditure on Agriculture

Agriculture is the mainstay of the majority of African economies, making notable contributions to employment and international trade. Hence, public spending on agriculture will expedite a wide range of benefits. In level terms, average annual government agriculture expenditure increased from US\$13.3 billion on average between 2003 and 2008 to US\$14.5 billion between 2008 and 2014 to US\$17.1 billion in the period from 2014 to 2022. A breakdown of government agriculture expenditure by country subgroup shows notable variation in the level of such spending. Among countries classified by income, middle-income countries account for 60 percent of total public spending on agriculture in Africa between 2014 and 2022. For the same period, the share of government spending on agriculture was the highest in the group of countries that have formulated both generations of NAIP (N11) at 60 percent of all such spending.

Growth in government agriculture expenditure in Africa was the highest in the early CAADP period but declined in subsequent subperiods. As a whole, the average annual growth rate in government agriculture spending was 5.3 percent between 2003 and 2008, but declined to 1.5 percent between 2008 and 2014 and fell further to a growth rate of just 0.3 percent between 2014 and 2022. As shown in Figure 13.14, a similar downward trend is observed for most of the country subgroups, particularly during the subperiod from 2014 to 2022.

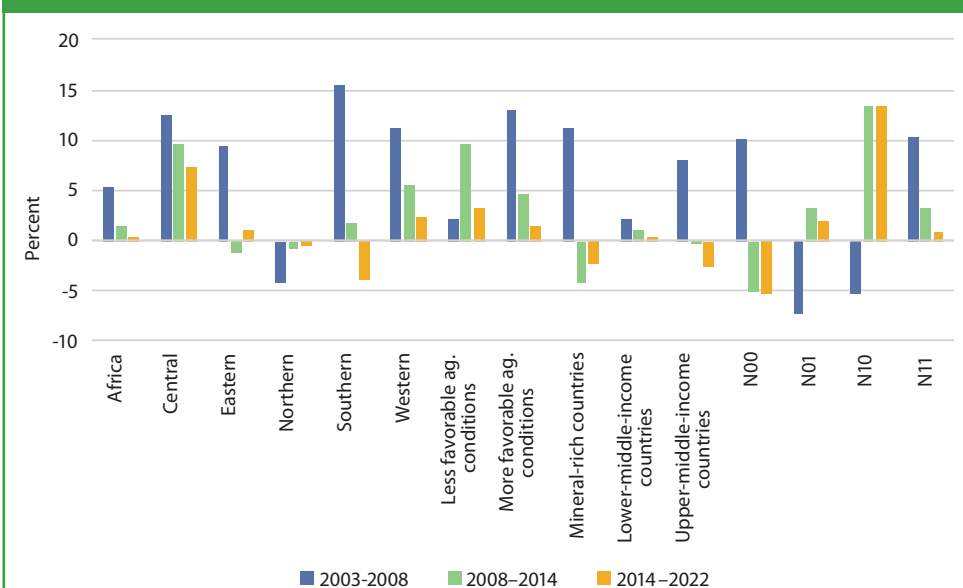
The share of government agriculture expenditure in total government expenditure remained modest over the last two decades. For Africa as a whole, the share was 3.6 percent on average between 2003 and 2008, before declining to 2.6 percent for the 2008 to 2014 period. The share that agriculture expenditure made up of total government expenditure improved moderately between 2014 and 2022, reaching 2.8 percent.

Marked differences in the share that agriculture expenditure makes up of total government expenditure were seen among country subgroups during the review period (Annex Table L.3.5.2). The highest share was

observed among the lower-income countries with less favorable agricultural conditions and the lower-income countries with more favorable agricultural conditions in all three subperiods. Among geographic regions, the eastern Africa region had on average the highest share of total government expenditure made up by agriculture expenditure.

Looking at agriculture expenditure as a share of total government expenditure at the country level, marked differences are seen across African countries. Very few countries consistently allocated a high share of their total public spending to agriculture (Figure 13.15). Only Ethiopia and Malawi consistently met the CAADP 10 percent budget target during the period from 2008 to 2022. The performance for other countries was much less consistent. Sierra Leone and Benin achieved the 10 percent budget target during the 2014 to 2022 period, devoting a much larger share of the national budget to agriculture than they did between 2008 and 2014. For the same period, Nigeria, Burkina Faso, Mali, and

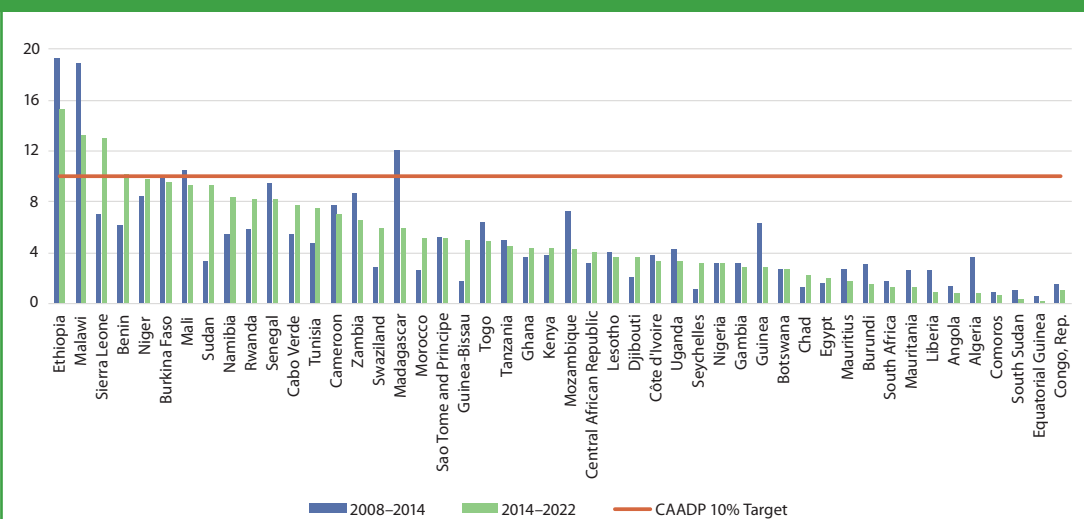
FIGURE 13.14—GOVERNMENT AGRICULTURE EXPENDITURE, AVERAGE ANNUAL PERCENTAGE CHANGE, 2003–2022



Source: ReSAKSS, based on IFPRI (2019), World Bank (2023), and national government sources.

Note: N00, N01, N10, and N11 categories refer to the presence or absence of first- and second-generation national agriculture investment plans (see footnote 5).

FIGURE 13.15—SHARE OF GOVERNMENT AGRICULTURE EXPENDITURE IN TOTAL GOVERNMENT EXPENDITURE, PERCENT, 2008–2022, BY COUNTRY



Source: ReSAKSS, based on IFPRI (2019), World Bank (2023), and national government sources.

Sudan allocated more than 9 percent of their public spending to agriculture, close to the CAADP 10 percent budget target.

The share of government agriculture expenditure in agricultural GDP marginally declined for Africa as a whole from an average of 5.3 percent for the period from 2003 to 2008 to 4.8 percent between 2008 and 2014 to 4.6 percent between 2014 and 2022 (Figure 13.16). The performance for country subgroups was mixed—some groups showed an increasing trend, while the opposite was observed for a few others (Annex Table L.3.5.3). Over the review period, public spending on agriculture relative to the size of the country’s agriculture sector was the highest for upper middle-income countries and the southern Africa region followed by the group of countries that are yet to embark on a NAIP (N00).

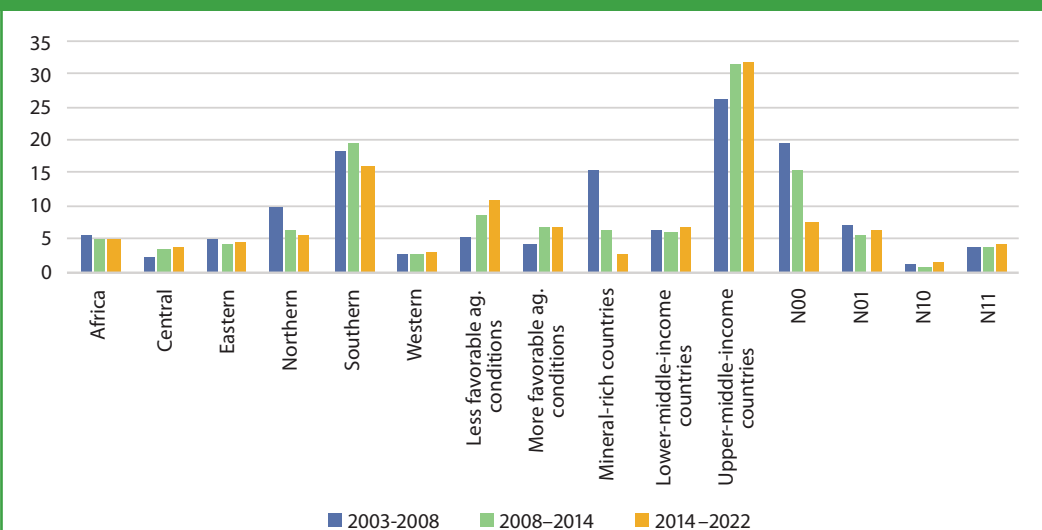
Conclusions

Africa has made major progress in agricultural development in several areas in the two decades since the launch of CAADP.

Robust economic growth, particularly in the 2000s, produced rising average incomes and household consumption expenditures across the continent. Growth also led to moderate but steady decreases in the poverty rate as well as a consistent lessening of the severity of poverty. Food security and nutrition also improved, with undernourishment declining in the 2000s and early 2010s, and child malnutrition declining consistently throughout the CAADP period. However, progress on many of these indicators has either slowed or reversed in recent years. Since the mid-2010s, average annual growth in GDP per capita and household consumption for Africa as a whole has been negative, and the prevalence of undernourishment has increased. The COVID-19 pandemic and the impacts of the Russia-Ukraine war have exacerbated challenges that were already becoming apparent before these crises hit.

Africa’s agriculture sector was an area of relative resilience during the COVID-19 crisis (Collins et al. 2022). Africa recorded notable growth in agriculture value addition over the last two decades. While growth in most years over this period has been positive, it has not met or surpassed the 6 percent CAADP agricultural growth target. Studies show that improved and sustainable growth in agriculture depends

FIGURE 13.16—GOVERNMENT AGRICULTURE EXPENDITURE AS A SHARE OF AGRICULTURE VALUE ADDED, AVERAGE, PERCENT, 2003–2022



Source: ReSAKSS, based on IFPRI (2019), World Bank (2023), and national government sources.

Note: N00, N01, N10, and N11 categories refer to the presence or absence of first- and second-generation national agriculture investment plans (see footnote 5).

heavily on the sources of growth. Innovation—that is, total factor productivity growth—accounts for only 1 percent of agricultural sector growth in Africa, while innovation accounts for 3 percent of agricultural sector growth in countries in Asia and Latin America (Fuglie and Rada 2013). This suggests that Africa must realize its potential for improved agricultural production and productivity through locally adapted and appropriate policy changes, investments, and innovations (Baumüller et al. 2020).

Africa is a net food-importing continent. The major commodities imported include cereals, meat, dairy products, fats, oils, and sugar, mainly from the rest of the world rather than elsewhere in Africa (FAO and AUC 2021). The market in Africa for these imported agricultural goods is primarily urban (Baumüller et al. 2020). The growing size of the middle class in Africa and relatively high rates of urbanization will boost demand for value-added agricultural products. Expanded intra-African trade in higher-value food and agricultural products could be central to responding to this growing demand. At present, intra-African agricultural trade makes up less than one-fifth of total food and agricultural imports by African countries—the equivalent measures for Asian and European countries are more than 60 percent (AUC 2021). To increase the share of intra-African trade in all trade in food and agricultural products, Africa needs to engage in the production of value-added agricultural goods that will substitute for the commodities that it now imports from the rest of the world. In this regard, the African Continental Free Trade Area (AfCFTA) will play a key role in boosting intra-African agricultural trade.

For a majority of African countries, expenditure on agriculture is less than the CAADP target of earmarking 10 percent of total public spending to the sector. Such expenditures in the sector are necessary to tackle poverty and hunger and to improve agricultural productivity. Improving resource mobilization is one avenue to address shortages in public agricultural expenditures. Moreover, allocating the available resources more efficiently in a manner that improves the productivity of the sector needs to be given more priority. To this end, evidence-based intra-sectoral prioritization is critical in improving agricultural resource targeting.

Temporal patterns for many of the CAADP RF indicators show marked contrasts by geographic region, country economic characteristics, and the degree of progress countries have made in CAADP implementation. For example,

northern African countries are notably different from the rest of the continent by having avoided declines in GDP per capita throughout the CAADP period. This group of countries also shows the lowest rates of poverty and undernourishment and the highest land and labor productivity growth rates. Among economic groupings, upper middle-income countries, while having the lowest rates of poverty and undernourishment overall, showed rising undernourishment throughout the CAADP period. This pattern may be related to low and declining employment rates in such countries. Upper middle-income countries and low-income mineral-rich countries also showed the lowest increases in agriculture value added throughout the CAADP period, including declines in some subperiods. Among the worst-performing countries are those with neither a first- nor a second-generation NAIP—these showed relatively large declines in GDP per capita since the mid-2010s, the highest increases in undernourishment, and low and declining employment rates.

Africa's progress over the last 20 years presents a picture of significant progress tempered by recent setbacks of concern. The post-Malabo agenda will need to build on the achievements of CAADP to date while finding new ways to address continuing challenges related to technical, institutional, and financial capacities. In particular, it will be essential for countries across Africa to maintain their commitments to enhance agricultural growth and productivity while increasing the level and efficiency of agricultural investments for a broader impact. The data challenges highlighted earlier also imply that focusing on mutual accountability in the post-Malabo period, including investments in filling data gaps, is imperative.