CHAPTER 2

Intra-African Agricultural Trade and Implications for Domestic Food Security

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1. Introduction

The 21st century ushered in a renewed sense of optimism regarding Africa's economic prospects. With a rapidly growing population, a burgeoning consumer market, and vast agricultural potential, the continent stands at a pivotal juncture. Central to this narrative of transformation is the agenda for regional integration, championed by the African Union's landmark African Continental Free Trade Area (AfCFTA). While the AfCFTA does not have a standalone protocol dedicated solely to agriculture or food security, these sectors are encompassed within the Protocol on Trade in Goods, which addresses tariff concessions, non-tariff barriers, and rules of origin applicable to agricultural products. Officially operationalized in 2021, the AfCFTA aims to create a single market for goods and services, facilitating the free movement of businesspersons and investments, and ultimately paving the way for a continental customs union.[1] Its primary objective is to significantly boost intra-African trade, which has historically languished at dismally low levels. Compared to Europe and North America, where intraregional trade represents a significant share of overall commerce, Africa's internal level of trade remains markedly lower (UNCTAD 2021).[2] This discrepancy is not merely a trade statistic; it reflects deep-seated structural issues with profound implications for one of the continent's most pressing challenges: food security.

The nexus between intra-African trade and food security is a critical yet complex field of inquiry. On one hand, theoretical models and empirical evidence from other regions suggest that enhanced regional trade can be a powerful engine for improving food security by: increasing food availability through cross-border flows; stabilizing domestic supply in the face of local production shocks; improving dietary diversity; enhancing accessibility via competitive prices; and allowing for a more efficient allocation of resources based on regional comparative advantage (Badiane and Odjo 2016; Kunaka et al. 2025). The African Development Bank (AfDB 2020) argues that opening regional food markets could increase the value of agricultural trade by up to 20 percent by 2040, substituting for US$10 billion in annual food imports from outside the continent and creating much-needed rural employment.

On the other hand, realizing this potential is far from guaranteed. The persistent gap between the *rhetoric* of regional integration and the *reality* of on-the-ground trade flows constitutes the central issue of this chapter. Despite numerous Regional Economic Communities (RECs) and decades of policy initiatives, intra-African trade, particularly in food products, remains hampered by a familiar litany of obstacles: nontariff barriers, poor transport infrastructure, restrictive customs procedures, and weak trade-related institutions (Bouët, Odjo, and Zaki 2020). The structure of this trade is itself a subject of concern. Many African economies remain oriented toward the export of raw commodities to global markets, while simultaneously relying on expensive imports for processed food and staple grains, making them vulnerable to volatile international prices and supply chain disruptions, as starkly revealed by the COVID-19 pandemic and the war in Ukraine (Badiane et al. 2022b; FAO 2023b).

This chapter provides a critical, evidence-based analysis of recent trends and patterns in intra-African trade and their direct implications for food security. The core questions addressed are: to what extent have recent trends in intra-African trade contributed to, or detracted from, enhancing food security across the continent; and what key policy-relevant dynamics determine this outcome? We posit that the relationship is not automatic or uniformly positive, but instead mediated by the nature of trade policies, the composition of trade flows, and domestic systems' capacity to use increased trade to achieve nutritional goals.

1 It should be noted that very little trade has occurred so far under the AfCFTA, particularly in agrifood products.
2 This comparison is based on official statistics, which do not account for informal cross-border trade, though this component of intra-African trade is relatively large.

To unpack these questions, Section 2 first explores the gap between Africa's regional trade goals and national food security policies. It highlights how governments often use trade restrictions, such as export bans and tariffs, to protect domestic food supplies, thereby undermining regional agreements and disrupting intra-African trade. Section 3 provides a granular, data-driven overview of intra-African trade trends and patterns over the past two decades, dissecting the composition of trade flows and identifying which food and agricultural products dominate intraregional commerce and how these patterns have shifted over time. Section 4 analyzes the food and nonfood trade balance between African regions and countries[3] to reveal the continent's internal trade asymmetries—that is, which regions are net exporters of food, and which ones are net importers[4]—to understand the vulnerability and interdependence within the African food system. Section 5 synthesizes the key findings and resultant policy implications.

2. Regional Trade Policies and Domestic Food Security

The intersection between regional trade policies and food security represents one of Africa's most complex and consequential challenges. As African nations grapple with persistent food insecurity, climate volatility, and global supply chain disruptions, governments are increasingly turning to trade policy instruments such as tariffs and nontariff barriers to safeguard domestic food supplies and protect local agriculture sectors (ACF 2025). But their implementation has created a paradoxical situation in which measures intended to enhance domestic food security often undermine regional integration efforts and exacerbate the very food access challenges they seek to address (Food Security Portal 2022).

In response to these dynamics, the AfCFTA and RECs, such as the Economic Community of West African States (ECOWAS), have emerged as critical platforms for addressing trade-food security tensions. Unfortunately, the gap between regional integration aspirations and national food security imperatives has widened significantly, particularly in the aftermath of recent regional and global shocks like the COVID-19 pandemic and the Russia–Ukraine conflict, alongside emerging issues posed by the creation of the Alliance des États du Sahel (AES) (Resnick 2025; Laborde, Mamun, and Parent 2020). This divergence has manifested in an unprecedented wave of agricultural export restrictions across the continent, fundamentally altering intra-African trade patterns and challenging the foundations of regional economic cooperation (Laborde and Mamun 2022). Although access to fertilizer remains highly constrained and many farmers are still exposed to global price and supply shocks, continental responses are emerging as countries such as Morocco[5] and, more recently, Senegal[6] ramp up regional fertilizer production and trade.

African nations have historically relied on tariff harmonization as a tool for promoting economic integration. Yet research indicates significant inconsistencies in the application of tariffs (Yahaya et al. 2024), undermining the potential benefits of harmonization, such as reduced trade costs and enhanced predictability for traders. Often, countries pursue conflicting objectives; for example, while some maintain low tariffs on agricultural inputs, they simultaneously impose domestic subsidies that distort regional trade (Odjo, Traoré, and Zaki 2023). Given Africa's increasing dependence on global food imports (see Chapter 1 in this report), a situation

3 This is based on a grouping of agricultural products into 25 food and nonfood product categories described in Appendix Table A2.1. In addition to products coverage under the WTO definition of "Agriculture," agricultural products in this analysis include fisheries products.

4 African regions are defined according to the United Nations geoscheme, presented in Appendix Table A2.2.

5 https://www.mei.edu/publications/moroccos-new-challenges-gatekeeper-worlds-food-supply-geopolitics-economics-and

6 https://msgbcoilgasandpower.com/news/senegal-leverages-gas-phosphate-resources-develop-fertilizer-industry

worsened by recent global crises, questions arise regarding the overall effectiveness of tariff policies. Tariff protections for domestic production risk elevating consumer food prices without addressing underlying supply chain vulnerabilities (Piñeiro et al. 2025).

In light of recent episodes of food insecurity, governments have made unilateral trade policy adjustments, exemplified by Nigeria's suspension of food import duties alongside export bans, a strategy combining a liberalization measure with a protectionist one (The Exchange 2024; Ohidah 2024). Nonetheless, such measures often disrupt regional trade cohesion and lead to unpredictable regulatory landscapes. While these actions may address immediate concerns, they detract from the long-term goals of enhancing agricultural productivity and bolstering supply chain resilience, perpetuating a cycle of crisis that undermines both trade integration and food security objectives (UNCTAD 2024a).

The ongoing rise in agricultural export restrictions across Africa illustrates this trend, as governments prioritize national food security at the expense of regional cooperation. For instance, Nigeria's ban on unprocessed maize exports and Ghana's prohibition on various key food staples exemplify this protective shift (allAfrica.com 2024; GhanaWeb 2024). These measures have resulted in widespread bans on agricultural products across West Africa, highlighting the growing tendency for countries to adopt protective approaches in response to domestic food supply issues (Le Monde 2024). The rationale often revolves around safeguarding food supplies and controlling inflation. However, they can even exacerbate domestic market volatility (Martin, Mamun, and Minot 2024), revealing the intricate relationship between food security and broader sociopolitical stability (GhanaWeb 2024).

Additionally, the rise in export restrictions has significant implications for agricultural value chains across the continent. For example, Benin's prohibition on raw cashew nut exports aims to stimulate local processing, but adversely impacts regional supply dynamics (Medium 2024). Disruptions in agricultural trade—such as Guinea's six-month suspension of vital grain exports—force neighboring countries to seek more costly alternatives, thereby damaging regional economies (Africanews 2023). This unpredictability in policy decisions discourages private sector investment, which is critical to fostering robust agricultural systems, exacerbating insecurity within regional supply chains.

Beyond explicit export restrictions, regulatory barriers (such as excessive customs procedures and unharmonized sanitary standards) increasingly constrain food trade within regions like ECOWAS (Yahaya et al. 2024). Research shows how these barriers complicate logistics, delay shipments, and inflate food prices, disproportionately affecting vulnerable communities and small-scale traders (Adinnu 2023). The absence of regional coordination on sanitary measures, such as mutual recognition of Sanitary and Phytosanitary measures, compounds the situation, as countries impose varied regulations that hinder market access across borders (UNCTAD 2024b).

Against this backdrop of regulatory fragmentation, the AfCFTA stands as Africa's most ambitious attempt to balance national interests with regional trade integration. However, the increased prevalence of food security-related trade restrictions complicates its implementation and undermines its objectives. The AfCFTA's potential success hinges on the removal of trade barriers that governments now view as essential for addressing food security (UNCTAD 2024b). This stark contrast between regional integration aspirations and national food security complicates coordination efforts among member states.

Regional organizations like ECOWAS face ongoing challenges in managing the tension between national policies and trade integration objectives. Their effectiveness is diminished by the lack of robust dispute resolution mechanisms (UNECA 2025). When confronted with food emergencies, countries often prioritize immediate national needs instead of pursuing long-term strategies to enhance regional food security. In that context, the AfCFTA is a legally binding, time-bound framework: it commits members to phased tariff elimination over 5, 10, or 13 years, backed by a five-year transition period to align national laws. Crucially for food security, it does not prohibit export restrictions but disciplines them: Article 10 allows export duties or bans only if they are applied in a nondiscriminatory manner and notified to the AfCFTA Secretariat 90 days in advance, turning ad hoc export bans into a more transparent, managed instrument rather than an unconstrained national reflex (African Union 2018**)**.

Overall, the intersection of trade policies and food security in Africa presents an intricate and evolving challenge, marked by national imperatives that frequently clash with regional integration goals. The resulting policy landscape presents a paradoxical situation whereby efforts to protect domestic food supplies offset the potential gains from regional cooperation. Addressing this requires not only strategic coordination among African nations but also a reevaluation of existing policy frameworks governing trade and food security in a rapidly changing global context. The following sections provide a granular examination of the evolution, composition, and direction of intra-African trade over the past decade, dissecting the core structural characteristics of this trade.

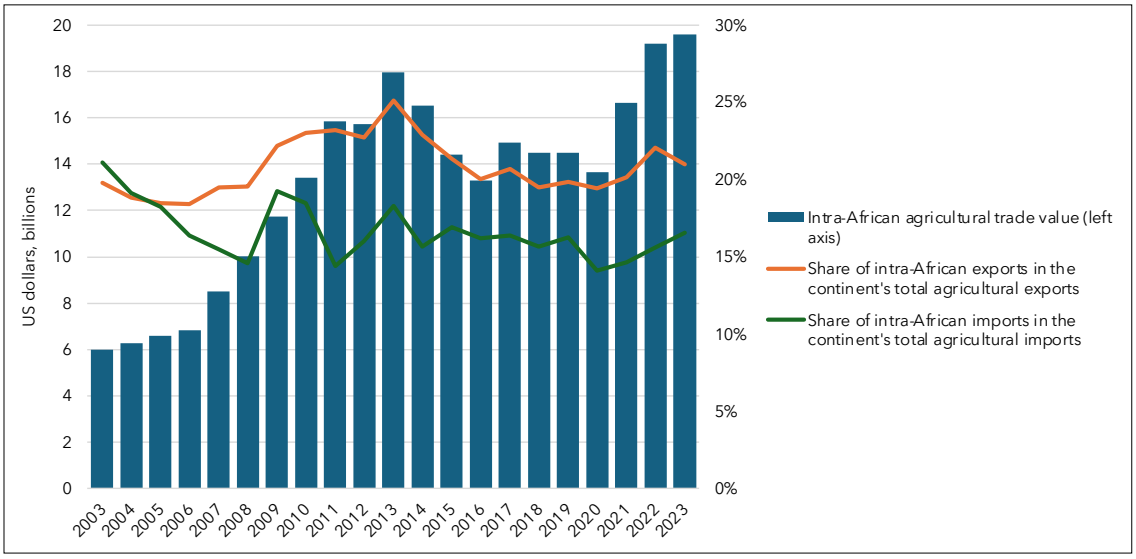
3. Intra-African Trade Trends and Patterns

This section examines the value of agricultural trade between African countries. We consider different levels of trade aggregation (continental, regional, and country), differentiate between food and nonfood products, and explore the stages of processing of intra-African trade products.

Trends in aggregate intracontinental trade

The value of intra-African agricultural trade more than tripled between 2003 and 2023, rising from approximately US$6 billion to nearly US$20 billion (Figure 2.1). It grew significantly in the mid- to late 2000s and early 2010s, peaking at US$18 billion in 2013. After a sharp decline between 2013 and 2016, it stagnated for a few years and began to rise again following the COVID-19 pandemic, reaching a new peak of US$19.6 billion in 2023. This pattern roughly follows the annual Food and Agriculture Organization (FAO) food price index, which declined for several years following a peak in 2011, rose moderately after 2016 and more rapidly from 2020 to 2022, and declined again in 2023 (Cissé, Kurtz, and Odjo 2020; Olivetti et al. 2023; FAO 2025). This parallel evolution suggests that growth in intra-African agricultural trade value is primarily driven by rising prices rather than an expansion of the quantity of goods traded. However, this growth pattern displays remarkable resilience, experiencing only temporary setbacks during global economic disruptions such as the 2008–2009 financial crisis and the 2020 COVID-19 pandemic. The resilience demonstrated during global economic shocks reveals another critical dimension. When international supply chains faltered, regional trade networks provided essential continuity for food availability, with relatively quick recovery following temporary disruptions. This suggests that African countries increasingly recognize regional partners as more reliable food sources during global market volatility. This strategic advantage could serve as a buffer against external shocks if adequately developed.

Figure 2.1 Evolution of intra-African agricultural trade in value and as share of total agricultural trade, 2003–2023



Source: Authors' calculations based on the AATM 2025 database.

The relative importance of agricultural trade within Africa compared to its overall agricultural trade portfolio shows interesting fluctuations. As a percentage of total agricultural exports, intra-African agricultural trade peaked in 2013 at 25 percent, coinciding with a period of accelerating regional integration, infrastructure development, and policy reforms aimed at stimulating private sector growth (UNCTAD 2013). Regional integration efforts were evident in initiatives like the COMESA-EAC-SADC[7] Tripartite Free Trade Area, which sought to align trade policies across 26 African nations (Zarenda 2013). Infrastructure projects such as the North–South Corridor and the LAPSSET Corridor improved connectivity and market access across East and Southern Africa (Sarbo 2013; Wohlmuth 2017). However, the share of intra-African agricultural exports has since moderated to around 21 percent. Similarly, the share of intracontinental sources of agricultural imports declined from the early 2000s' peaks of above 20 percent to 15-17 percent in recent years, perhaps driven by shifting demand patterns and calls for efforts to strengthen domestic food systems. According to Olivetti et al. (2023), intra-African trade has shifted from mainly unprocessed foods to greater imports of highly processed agricultural products, driven by evolving consumer preferences and industrial food system growth. This pattern is part of a broader *nutrition transition* that the authors link to rising burdens of overweight, obesity, and diet-related noncommunicable diseases in African countries. This trend signals deeper structural changes in African supply chains, not just a swap in product types.

Regional trade patterns within Africa

Amounting to US$16.7 billion, intra-African agricultural trade grew an average of 6.7 percent annually between 2019 and 2023 (Table 2.1). Southern Africa emerges as the dominant exporter, accounting for 36.1 percent of total intra-African agricultural exports, and the second largest importer, being the destination of 23 percent of intracontinental imports. The export leadership is largely attributable to South Africa's industrial agricultural base, advanced food processing infrastructure, efficient logistics networks, and long-standing investment in commercial farming (Olivetti et al. 2023). These structural advantages reflect decades of

7 COMESA = Common Market for Eastern and Southern Africa; EAC = East African Community; SADC = Southern African Development Community.

modernization, access to capital and technology, and deep market integration. However, the region's modest intra-African export growth rate of 3.6 percent suggests that its expansion may be constrained not only by market saturation in key SADC markets like Botswana and Mozambique—where demand has plateaued (Department of Agriculture, Land Reform and Rural Development 2024—but also by environmental challenges such as cyclone-related floods and droughts, which have also constrained production volumes and trade capacity (FEWS NET 2023).

Table 2.1 Regional breakdown of intra-African agricultural trade value and growth, 2019–2023 average

	Exports				Imports		
Exporter	Value (million US$)	Share (%)	Annual growth rate (%)	Importer	Value (million US$)	Share (%)	Annual growth rate (%)
North Africa	2.962	17.6	12.7	North Africa	2.491	14.8	12.0
West Africa	2.599	15.7	3.9	West Africa	3.181	19.1	3.7
Central Africa	196	1.1	48.6	Central Africa	1.250	7.4	14.2
East Africa	4.976	29.5	11.5	East Africa	5.935	35.4	10.7
Southern Africa	5.984	36.1	3.6	Southern Africa	3.860	23.3	2.6
Intra-African exports	16.717	100	6.7	Intra-African imports	16.717	100	6.7

Source: Authors' calculations based on the AATM 2025 database.

Note: (1) Appendix Table A2.2 provides the countries composing each region. (2) Average values, shares, and annual growth rates over the period 2019–2023 are presented. 3. Intra-African exports and imports of a region include both intra- and extraregional trade within Africa.

In contrast, East Africa is the second-largest exporter (29.5 percent) and the continent's largest importer (35.4 percent). This apparent paradox is underpinned by several interrelated dynamics. First, the region is the largest and its diverse agroecological zones support a wide variety of crops, enabling export diversification. Second, its strategic location links multiple subregions, facilitating cross-border trade flows. Third, seasonal production cycles create periods of surplus exports postharvest and increased imports during lean seasons. Fourth, reexport activities—whereby imported goods are processed and reexported —blur the lines between import and export roles. Therefore, the region's strong 11.5 percent export growth rate signals a vibrant and expanding agriculture sector, while its 10.7 percent import growth reflects intensifying food demand driven by rapid urbanization and demographic pressures.

North Africa's trade profile is relatively balanced, contributing 17.6 percent of intra-African exports and absorbing 14.8 percent of imports, with exports and imports growing at almost equal rates (12.7 and 12.0 percent, respectively) above the continental average. This equilibrium suggests a degree of internal coherence between production and consumption capacities. In contrast, West Africa contributes 15.7 percent of intracontinental exports and absorbs 19.1 percent of imports. At only 3.9 percent for exports and 3.7 percent for imports, the region's intra-African trade growth rates are significantly below the continental average. West Africa's poorer performance is primarily due to infrastructural deficits that raise transport costs and delay shipments, such as poor road and port connectivity along key corridors like Lagos-Abidjan (Ayodeji 2025), in addition to the proliferation of trade policy barriers discussed earlier. Moreover, underdeveloped value chains restrict diversification beyond raw commodity exports, limiting competitiveness (Odjo, Traoré, and Zaki 2023).

Central Africa contributes the least to intra-African agricultural trade, with only 1.1 percent of total exports but 7.4 percent of imports. Its minimal export base underscores limited productive

capacity, weak market access, and underdeveloped trade infrastructure. Yet the region's remarkable 48.6 percent export growth rate, albeit from a low baseline, signals potential transformation. This surge may reflect post-conflict recovery, improved regional integration, targeted investments in trade corridors, and a gradual transition from subsistence to market-oriented agriculture. Nonetheless, the absolute volume remains insufficient to meaningfully alter its dependency status in the short term.

Leading intra-African trade players

Agricultural products traded in Africa are split into 25 product categories (including 17 food and 8 nonfood categories) to provide a more detailed analysis of intra-African trade performance between 2019 and 2023 (Table 2.2). The most traded product categories (accounting for at least US$1 billion, or approximately 6 percent of total intra-African agricultural trade) are food products, though not all are staples, including oilseeds and vegetable oils, cereals, fish, sugars and sugar confectionery, vegetables, and "other edible products." Oilseeds and vegetable oils (nearly US$2 billion) and cereals (more than US$1.7 billion) recorded not only the two largest intra-African trade values but also the highest trade growth rates among food product categories, at 16.6 percent and 16.4 percent, respectively. South Africa is the leading exporter in both product categories, enjoying 18 percent of intracontinental export markets for oilseeds and vegetable oils and 45 percent of cereals export markets. Ethiopia is the primary importer of oilseeds and vegetable oils, absorbing 13 percent of intracontinental imports, while Zimbabwe is the leading importer of African cereals (15 percent).

Fish trade among African countries, worth US$1.6 billion, slightly decreased on average between 2019 and 2023 (-0.63 percent). With 22 percent of the intracontinental export market, Morocco is the primary exporter of fish to other African countries, while Côte d'Ivoire is the leading importer, accounting for 21 percent of intra-African fish supplies. Growing at 9.7 percent annually, the intra-African trade of sugars and sugar confectionery amounted to US$1.5 billion, with Eswatini contributing the largest exports to other African countries and South Africa the largest imports from other African countries. Intra-African trade of vegetables was worth US$1.1 billion, growing at 16.4 percent, with Ethiopia the leading exporter (28.5 percent of the market) and Somalia the leading importer (20 percent).

Among other food product categories, dairy and eggs, edible fruits and nuts, coffee and tea, food preparations, and beverages are notable by their trade values of US$500 million to US$1 billion and their substantial annual growth rates of 2.8–9.9 percent, except for coffee and tea, which were stable. South Africa, Kenya, Morocco, Egypt, and Botswana are the biggest players in the intracontinental trade of these products.

Tobacco and manufactured tobacco substitutes are the most traded nonfood product categories among African countries, with Zimbabwe the largest exporter (17 percent of the market) and Egypt the primary importer (8 percent). Stable and amounting to US$952 million, intracontinental trade of tobacco products was larger than the trade of edible fruits and nuts and the combined trade of meats and dairy products. The largest growth rates in intra-African agricultural trade were recorded for nonfood products, including animal fibers (57 percent), cotton and other vegetable fibers (36 percent), and live plants and flowers (25 percent), though they were traded at much lower values than major food products.

Worth noting is that the biggest players generally hold less than 50 percent of the intra-African exports or imports of most product categories, except for live farm animals, meats and edible offals, animal fats, juices, beverages, hides and skins, and animal fibers, which are traded at tiny values, together accounting for nearly 12 percent of intra-African agricultural trade. Hence,

other countries participate in the intracontinental trade of the different product categories as exporters, importers, or both. Only the most important actors are mentioned in Table 2.2 for brevity. South Africa is the dominant exporter of 15 product categories and the dominant importer of 6, illustrating the scale and diversity of its participation in intra-African agricultural trade. Egypt and Botswana also participate significantly in intracontinental agricultural trade as top importers of four product categories each. Only 7 of 32 African Least Developed Countries (LDCs)[8] are found among the leading intra-African traders of agricultural products: Sudan as a top exporter; Mozambique and Somalia as top importers; and Ethiopia, Lesotho, Tanzania, and Zimbabwe as top exporters and importers. Table 2.2 demonstrates that a country's economic size and structure, productive capacity, and infrastructural base are crucial factors that determine its scale of engagement in intra-African trade.

Table 2.2 Intra-African agricultural trade performance, by product category, 2019–2023 averages

Product categories	Value (million US$)	Trade share (%)	Annual growth rate (%)	Primary exporter		Primary importer	
				Country name	Exports share (%)	Country name	Imports share (%)
Food products							
Live farm animals	287.2	1.72	1.87	Namibia	37.07	South Africa	55.42
Meats and edible offals	291.0	1.74	-1.63	South Africa	60.95	Lesotho	20.66
Dairy and eggs	558.6	3.34	2.76	South Africa	43.08	Kenya	15.22
Fish	1.579.8	9.45	-0.63	Morocco	22.55	Côte d'Ivoire	20.66
Shellfish	26.5	0.16	-0.58	Namibia	27.96	South Africa	33.25
Animal fats	8.2	0.05	4.37	South Africa	69.98	Mozambique	34.07
Vegetables	1.080.0	6.46	16.4	Ethiopia	28.51	Somalia	19.97
Edible fruits and nuts	859.8	5.14	6.46	South Africa	39.09	Morocco	16.2
Juices	229.1	1.37	0.7	South Africa	60.44	Botswana	16.15
Coffee and tea	725.4	4.34	-0.08	Kenya	41.94	Egypt	33.84
Cocoa and chocolate	210.5	1.26	8.37	South Africa	27.34	South Africa	11.09
Cereals	1.725.2	10.32	16.6	South Africa	45.07	Zimbabwe	15.3
Oilseeds and vegetable oils	1.992.2	11.92	16.41	South Africa	18.24	Ethiopia	12.83
Food preparations	800.6	4.79	8.59	South Africa	37.85	Botswana	8.61
Sugars and sugar confectionery	1.510.0	9.03	9.66	Eswatini	23.16	South Africa	21.46
Beverages	999.8	5.98	9.89	South Africa	55.84	Botswana	16.72
Other edible products	1.175.3	7.03	3.78	South Africa	40.29	Botswana	7.28

8 LDCs are low-income countries with weak human assets, high economic and environmental vulnerability, and structural barriers to sustainable growth. They have exclusive access to certain international support measures, including preferential trade access (duty-free/reduced tariffs), financial and technical cooperation, and support for participation in international forums. https://policy.desa.un.org/least-developed-countries

Table 2.2 Intra-African agricultural trade performance, by product category, 2019–2023 averages (cont'd)

Product categories	Value (million US$)	Trade share (%)	Annual growth rate (%)	Primary exporter		Primary importer	
				Country name	Exports share (%)	Country name	Imports share (%)
Nonfood products							
Live plants, cut flowers, and foliage	41.8	0.25	25.44	South Africa	33.07	South Africa	11.62
Seeds	217.1	1.3	2.9	South Africa	36.25	Tanzania	12.49
Residues and waste	716.3	4.28	7.38	South Africa	35.89	Morocco	11.05
Tobacco and manuf. tobac. substitutes	952.4	5.7	-1.13	Zimbabwe	16.63	Egypt	8.02
Hides and skins	82.4	0.49	58.3	Tanzania	35.14	Nigeria	81.47
Animal fibers	44.1	0.26	56.93	Lesotho	87.29	South Africa	87.56
Cotton and other veg. textile fibers	258.4	1.55	36.38	Sudan	25.66	Egypt	39.02
Other nonfood products	345.4	2.07	11.63	South Africa	28.47	Egypt	23.08
Total, agriculture	16.7172	100	6.72	South Africa	27.99	South Africa	8.21

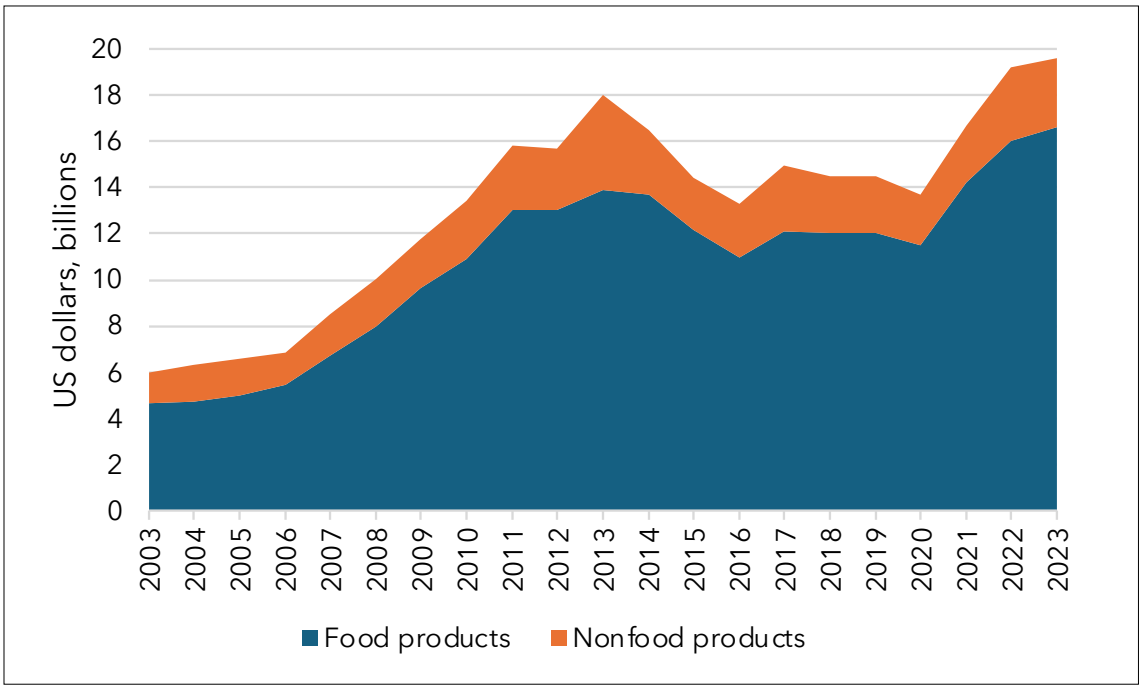
Source: Authors' calculations based on the AATM 2025 database.

Note: Trade values, shares, and annual growth rates are averaged over 2019–2023 from annual figures. The lists of the HS6-digit level products comprising the different product categories are provided in Appendix Table A2.1.

Food in intra- and extra-African trade

Building directly on the growth patterns observed in Figure 2.1, the compositional analysis of intra-African agricultural trade reveals why this commerce matters so profoundly for food access. Food products consistently occupy approximately three-quarters to four-fifths of total intra-African agricultural trade across the entire two-decade period (Figure 2.2). This pattern sharply contrasts with Africa's trade with global markets, which is more focused on export-oriented cash crops. On one hand, this pragmatic division reflects adaptation to limited overall productive capacity and the urgency of feeding rapidly growing populations with finite resources. On the other hand, this distinction reflects the functional role of regional trade within Africa's food system: it is primarily geared toward satisfying domestic consumption and addressing immediate food security needs. In fact, intra-African trade flows are more localized and responsive to nutritional demands, whereas extra-African exports tend to prioritize commodities like cocoa, coffee, and cotton destined for international markets (Odjo and Zaki 2020; DTIC 2023).

Figure 2.2 Breakdown of intra-African agricultural trade into food and nonfood products, 2003–2023

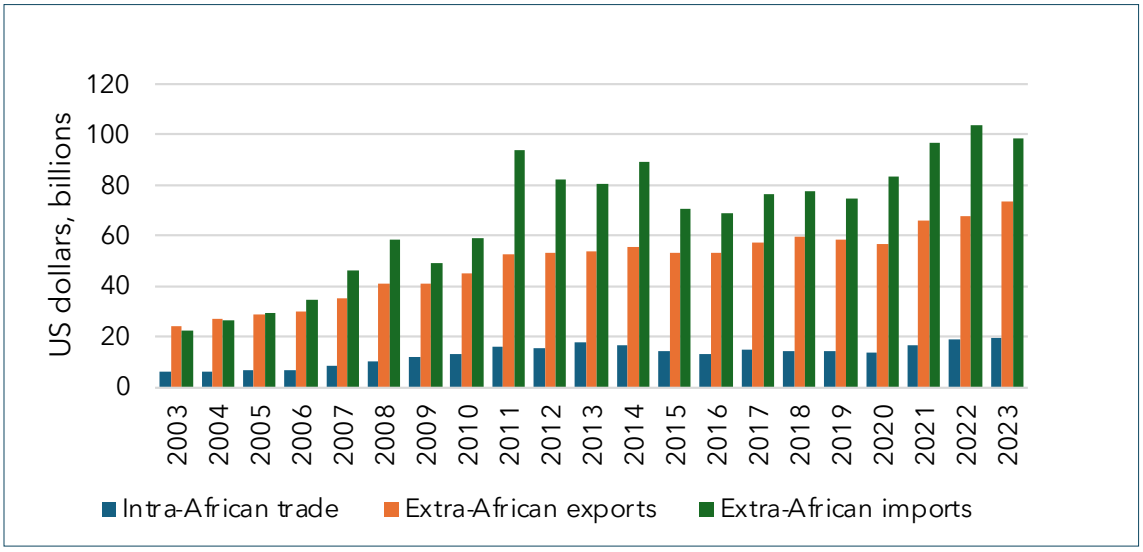


Source: Authors' calculations based on the AATM 2025 database.
Notes: The grouping of agricultural products into food and nonfood products is provided in Appendix Table A2.2.

The stability of this food-dominated pattern across economic cycles (including the 2008 financial crisis and the 2020 pandemic) indicates that the fundamental structure of intra-African agricultural trade is driven by persistent factors rather than short-term market fluctuations. These factors include complementary agroecological production zones where surplus harvests in one region naturally supply deficit areas in neighboring countries. Also, shared dietary preferences rooted in cultural and geographic proximity promote demand for similar staple foods across neighboring countries, reinforcing trade linkages (Olivetti et al. 2023). Moreover, food security imperatives prioritize the reliable circulation of staple foods to ensure access, often overriding profit-maximizing export strategies (Torero 2021). Porous borders, costly and complex trade formalities, and cross-border ethnic networks contribute to informal cross-border trade, primarily operated by women traders who move predominantly food products through informal trade routes to avoid harassment and violence, and to circumvent regulations like export bans or import quotas (Bouët, Cissé, and Traoré 2020).

The comparison between intra-African and extra-African agricultural trade flows reveals a particular aspect of Africa's demand landscape (Figure 2.3). While intra-African agricultural trade exhibited steady growth until the mid-2010s and rebounded to nearly US$20 billion by 2023, Africa's agricultural exports beyond the continent consistently outpaced intra-African trade, rising from US$24 billion in 2003 to over US$74 billion in 2023. Moreover, Africa's agricultural imports from outside the continent increased significantly, soaring from US$22 billion in 2003 to nearly US$99 billion in 2023, five times the value of intra-African trade. This stark reality indicates that despite the continent's vast agricultural potential, it remains heavily dependent on external markets. Consequently, the considerable import bill represents a significant opportunity that could be redirected to stimulate intra-African production and trade, creating a multiplier effect throughout African economies.

Figure 2.3 Trends in intra- versus extra-African agricultural trade, 2003–2023

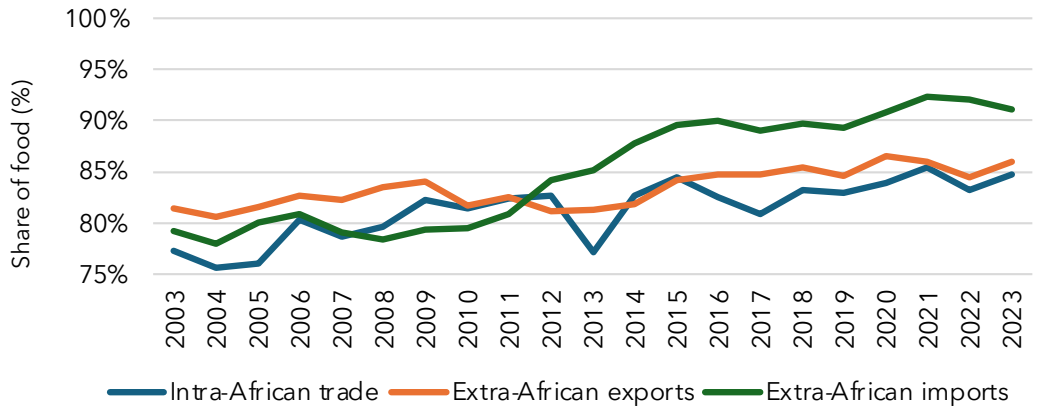


Source: Authors' calculations based on the AATM 2025 database.

This persistent trade imbalance is deeply entrenched in colonial legacies that shaped economic structures primarily for extraction rather than transformation. Colonial powers fundamentally reorganized African economies to serve as suppliers of raw materials to European industries, simultaneously discouraging local manufacturing and regional trade. Such arrangements established enduring dependencies that continue to influence trade relationships today, often resulting in asymmetric trade flows (Courade 2022). This historical path dependency—combined with structural constraints and global market dynamics—clearly explains the massive imbalance in Africa's trade and production systems.

In addition, food products consistently dominated Africa's agricultural trade across all channels between 2003 and 2023, yet their relative shares evolved in ways that signal deepening structural dependencies. Specifically, intra-African agricultural trade maintained a high and rising food share (Figure 2.4), increasing from 77 percent in 2003 to 85 percent in 2023, with a notable spike between 2019 and 2023 (84 percent) compared to the period 2009–2013 (81 percent). This upward trend confirms previous findings that African countries tend to focus on essential food security commodities when trading with one another, thereby recognizing regional networks as vital sources of staple foods. However, the share of food products in extra-African exports has always been larger. It increased on average from 81 percent to 86 percent between the two periods, underscoring Africa's ongoing role as a global supplier of food commodities, along with traditional cash crops. But the most striking and concerning trend arose in extra-African imports (see Chapter 1). While food share used to be smaller in extra-African imports than in extra-African exports and even in intra-African trade (between 2008 and 2011), it has since grown, surging from 79 percent in 2003 to 91 percent in 2023.

Figure 2.4 Trends in food shares of intra- versus extra-African trade, 2003–2023



Source: Authors' calculations based on the AATM 2025 database.

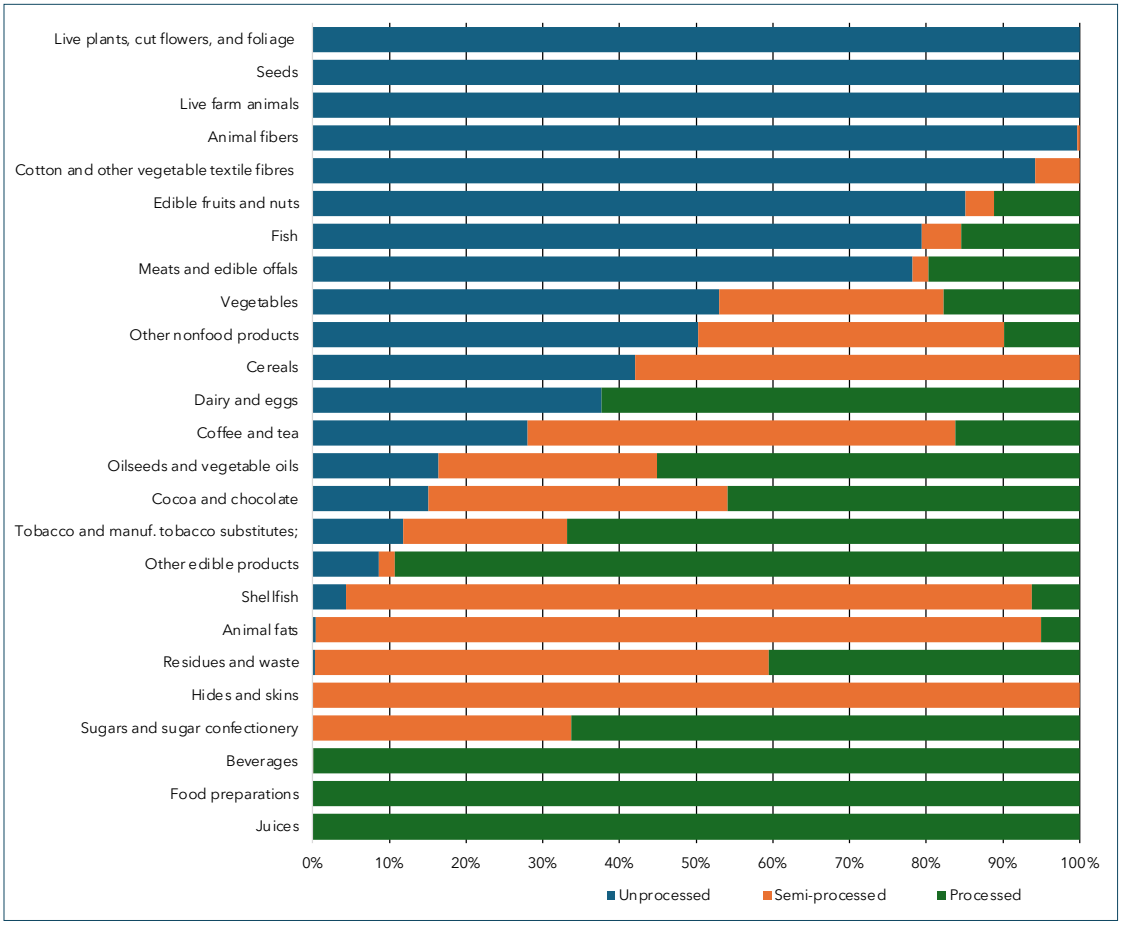
The stark imbalance between the high reliance on food imports (exceeding US$90 billion annually) and the modest level of intra-African trade (US$20 billion) draws attention to the urgent need to strengthen regional production and trade systems to mitigate vulnerability and enhance self-sufficiency. Additionally, the rising food share across all trade channels signifies both the central role of food in Africa's trade landscape and the strategic importance of regional cooperation, which is essential to address structural dependencies and build resilient food systems capable of withstanding external shocks.

Processing stages across product categories

The bulk of agricultural products entering trade among African countries have undergone some processing (Bouët, Odjo, and Zaki 2020; Odjo, Traoré, and Zaki 2023). Between 2019 and 2023, processed (44 percent) and semi-processed (23 percent) products made up 67 percent of the value of intra-African agricultural trade, while raw products comprised 33 percent. The share of processing rose from 62 percent in 2003 to 68 percent in 2023, an expansion with multiple benefits: greater value retention within the continent, enhanced employment generation in food processing sectors; improved food safety and quality through standardized industrial practices; and product availability extended beyond traditional harvest seasons (Badiane et al. 2022a).

Figure 2.5 illustrates the levels of processing of product categories traded among African countries. The most highly processed categories are generally nonstaple food products, appearing at the bottom of the vertical axis, from fruit juices to coffee and tea. Processed and semi-processed products account for more than 70 percent of intra-African trade in each of these categories. Conversely, the least processed categories are generally nonfood products, seen at the top of the vertical axis, from cotton to live plants. Less than 20 percent of their trade value consists of processed or semi-processed products. Staple food categories that anchor African diets and food security are found in between, with more than 20 percent of processed or semi-processed products, and significant shares of unprocessed products traded among African countries.

Figure 2.5 Breakdown of intra-African trade value by product processing stage, 2019–2023



Source: Authors' calculations based on the AATM 2025 database.

For instance, cereals constitute the dominant energy source in African diets (FAO 1997). Notably, over 40 percent of intra-African trade in cereals occurs in completely unprocessed form, slightly less than 60 percent as semi-processed products, and almost none as fully processed cereals. This distribution indicates that grains primarily move between countries as whole kernels or basic flour, reflecting minimal transformation into consumer-ready products that could enhance convenience, nutritional value through fortification, and market value (FWGA 2023).

Similarly, fish products—which serve as a critical protein source for food security, particularly in coastal and lakeside regions—show an even more pronounced concentration in unprocessed form. Approximately 80 percent of fish trade occurs in raw form, while only 15 percent reaches processed status. This overwhelming dominance suggests that most regional fish commerce involves fresh, frozen, or minimally preserved products rather than value-added items, such as canned fish, fish meal, smoked products, or fish-based convenience foods.

Meat and edible offals reveal a comparable pattern, with over 70 percent traded in unprocessed form and merely 20 percent as processed products. This indicates that regional meat trade is primarily composed of live animals or fresh/frozen carcasses, rather than processed items like sausages, cured meats, canned goods, or ready-to-cook preparations.

Dairy and eggs demonstrate a somewhat more balanced processing pattern, with approximately 40 percent traded unprocessed, over 60 percent processed, and none semi-processed. These products move directly from raw to processed form. Similarly, over 50 percent of vegetables, including roots and tubers, are traded unprocessed, 30 percent are semi-processed, and only 20 percent are fully processed. Thus, most vegetable trade involves fresh produce, with limited transformation into canned goods, frozen vegetables, dried products, or other processed preparations.

These patterns can be attributed to multiple interconnected constraints. Notably, Africa's large share of unprocessed agricultural trade is driven by poor infrastructure, inadequate cold chains, limited rural electrification, and a lack of capital for processing. Inadequate cold chains fail to maintain the required temperature ranges for temperature-sensitive products, leading to food loss, spoilage, and health risks. Collectively, these factors raise trade costs and force the immediate sale of fresh goods (Hodder and Migwalla 2023).

For the AfCFTA, the implication is that full implementation of the annexes to the Protocol on Trade in Goods (on tariffs, rules of origin, trade facilitation, nontariff barriers, transit, and trade remedies) will only translate into deeper intra-African agrifood trade if paired with investments that tackle these structural bottlenecks at and behind the border. In practice, this means (1) aligning REC and national trade-facilitation agendas with AfCFTA provisions (harmonized customs procedures, risk-based inspections, electronic certification, and nontariff barrier reporting), (2) accelerating digitalization of border and logistics systems, while (3) using the Protocol on Trade in Services and emerging digital-trade rules to open and regulate key backbone services such as transport, logistics, cold chain management, finance, and digital platforms.

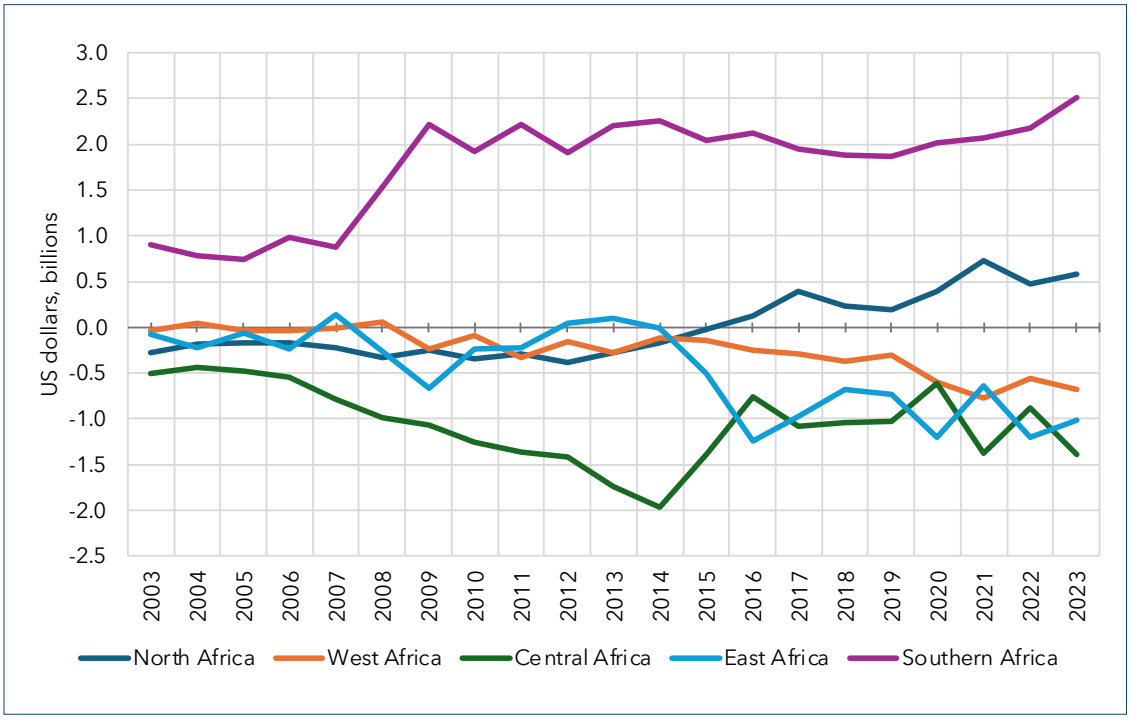
4. Food and Nonfood Trade Balance between African Regions and Countries

Understanding the dynamics of intra-African trade in agricultural products is essential for evaluating the continent's progress toward regional integration and food system resilience. This section provides a comparative overview of net agricultural trade performance across African regions and countries from 2003 to 2023.

Intracontinental trade balances

Examining net intra-African agricultural export value by region between 2003 and 2023 reveals notable disparities in regional trade performance (Figure 2.6). Southern Africa consistently maintained a strong positive trade balance, with net exports increasing steadily over time and culminating at US$2.5 billion in 2023. North Africa demonstrated a marked transition from trade deficits in the early 2000s to surpluses from 2016 onward, reaching US$577 million in 2023. In contrast, between 2019 and 2023, Central Africa, West Africa, and East Africa ran intra-African agricultural trade deficits averaging US$1,054 million, US$581 million, and US$959 million, respectively. These regional aggregates are heavily influenced by the commercial performance of a few dominant regional players, as analyzed below.

Figure 2.6 Net intra-African agricultural exports value by region, 2003–2023



Source: Authors' calculations based on the AATM 2025 database.

Southern Africa's trade surplus mostly consisted of food products (Table 2.3). Between 2019 and 2023, its overall surplus of US$2.12 billion comprised US$1.97 billion of food products and only US$0.15 billion of nonfood products. While the region's agricultural trade surplus grew 4.5 percent annually over that period, its food trade surplus expanded faster (5.2 percent), and its nonfood trade surplus declined by 4.7 percent.

Table 2.3 Net intra-African export value and growth by region and product category, 2019–2023 average

	Food products		Nonfood products		All agricultural products	
	Value (million US$)	Growth rate (%)	Value (million US$)	Growth rate (%)	Value (million US$)	Growth rate (%)
North Africa	687	12.2	-216	-1.8	471	29.6
West Africa	-563	10.8	-19	-94.0	-582	17.8
Central Africa	-917	24.1	-138	21.9	-1054	17.4
East Africa	-1177	16.4	218	35.9	-959	16.2
Southern Africa	1.969	5.2	155	-4.7	2.124	4.5

Source: Authors' calculations based on the AATM 2025 database.

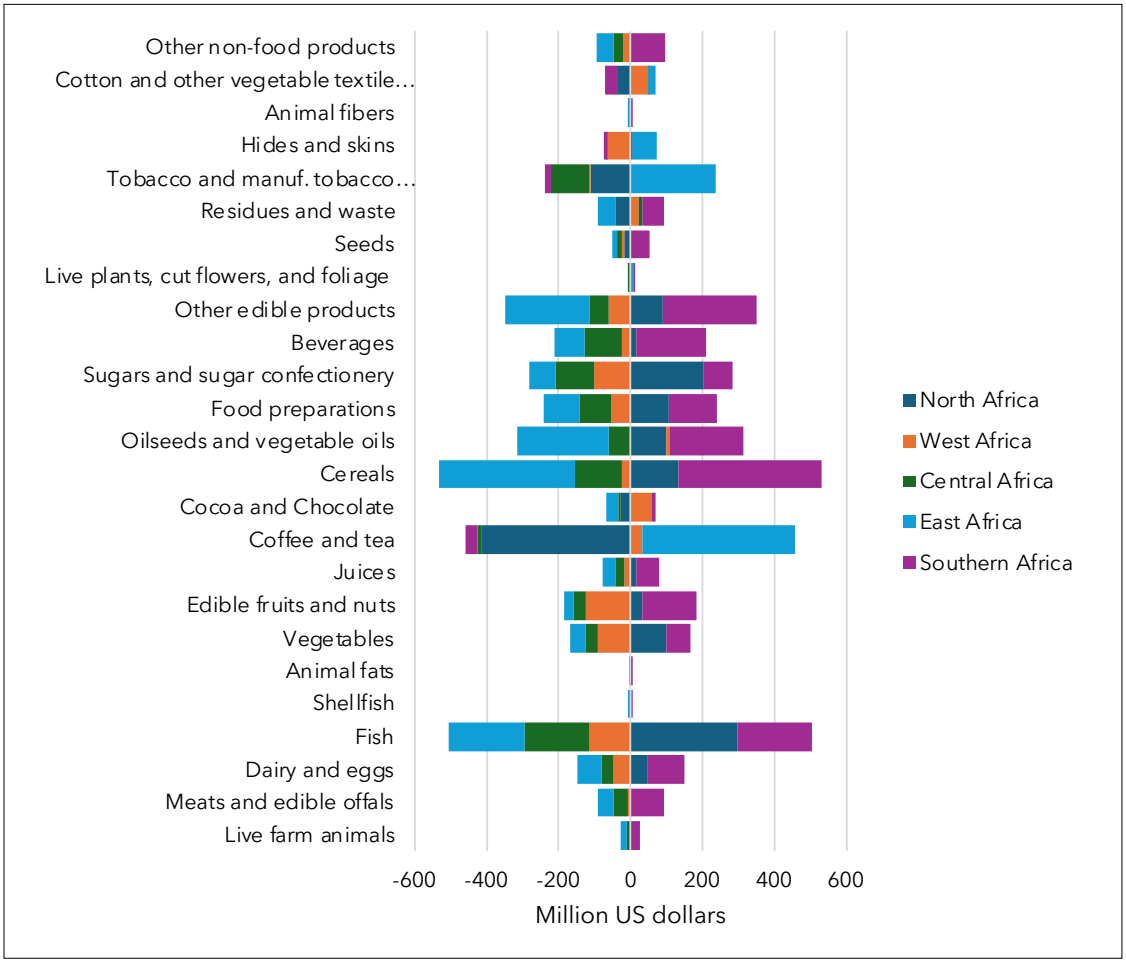
Similarly, North Africa's intra-African trade surplus primarily consisted of food products. The region's relatively modest agricultural trade surplus of US$471 million comprised a US$687 million food trade surplus and a US$216 million nonfood trade deficit. As well, the region's strong agricultural trade surplus growth of 30 percent was primarily driven by a food trade surplus growth of 12 percent against a nonfood trade deficit decline of 1.8 percent.

Consequently, West, Central, and East Africa's agricultural trade deficits primarily consisted of food trade deficits (Table 2.2). Between 2019 and 2023, East Africa experienced the highest food trade deficit with other African regions, at US$1.18 billion compared to US$917 million in Central Africa and US$563 million in West Africa. More concerning is that the food trade deficit in these three regions expanded at double-digit growth rates in recent years: 11 percent in West Africa, 24 percent in Central Africa, and 16 percent in East Africa.

Overall, in net intra-African trade terms, food moves from Southern Africa and more modestly from North Africa to West, Central, and East Africa. The direction of net trade between African regions is investigated for product categories next.

Figure 2.7 presents the net intra-African trade position of each region by product category. The bars on the right side of the vertical axis indicate net export values, while those to the left denote net import values. The figure provides insights into which countries would benefit more from an expansion of intracontinental trade in terms of food security.

Figure 2.7 Net intra-African export value by region and product category, 2019–2023 average



Source: Authors' calculations based on the AATM 2025 database.

Southern Africa's position as the dominant net seller of agricultural products in intracontinental markets is clear (Figure 2.7). The region's net export supplies met or contributed to meeting other regions' net import demands for 21 of the 25 product categories under analysis. For instance, Southern Africa's net exports of live farm animals supplied all of the net imports by East Africa (US$16 million), Central Africa (US$8.5 million), West Africa (US$1.3 million), and

North Africa (US$1.2 million). Similarly, the region's net exports supplied all net imports of seeds and other nonfood products by the other four regions.

In contrast, net import demand for 11 product categories was met by Southern Africa and North Africa together, underscoring the importance of the latter as the second largest net seller in intra-African markets. For instance, net import gaps for cereals by East Africa (US$376 million), Central Africa (US$132 million), and West Africa (US$24 million) were matched by net export supplies from Southern Africa (US$400 million) and North Africa (US$132 million). Southern Africa and North Africa were the largest net sellers in intra-African cereals markets, while East and Central Africa were the largest net buyers, reflecting persistent production imbalances across regions. It is worth noting that the other 10 product categories were also foodstuffs, including animal products (meats and edible offals, dairy and eggs, and fish), unprocessed crops (vegetables, and edible fruits and nuts), processed products (juices, food preparations, sugars and sugar confectionery, and beverages), and other edible products.

North Africa was the leading net exporter of fish within Africa, benefiting from a strong fishing industry and sectoral investments. By contrast, East and Central Africa consistently recorded a trade deficit for fish.

North Africa's net vegetable exports reflect investments in irrigated and intensive agriculture, combined with favorable climate conditions. Similarly, North and Southern Africa's dominance in trade in edible fruits and nuts was due to their better orchard capacities and more integrated supply chains. The pattern of net trade in juices also reflects regional conditions and capabilities: North and Southern Africa achieved trade surpluses, whereas Central and East Africa recorded the largest net imports, illustrating disparities in both agricultural processing and local production structures. In general, the net importer position of Central, West, and East Africa in intra-African markets of processed food products reveals significant gaps in agro-industrial capacity and supply chain integration.

West Africa is remarkable with its net exports in eight product categories, including five food product categories (shellfish, animal fats, coffee and tea, cocoa and chocolate, and oilseeds and vegetable oils). For instance, in addition to Southern Africa's net exports, West Africa contributed to the supply of the net imports of shellfish, animal fats, and cocoa and chocolate demanded by the other three regions. The region stands out as the continent's dominant net exporter of cocoa and chocolate, a reflection of its global leadership and specialized production infrastructure in cocoa cultivation. By contrast, East Africa and North Africa are the largest net importers of this product, as local processing and consumption needs outpace their own cocoa production capacity. Similarly, West Africa complemented net exports of oilseeds and vegetable oils from Southern Africa and North Africa to meet the net imports of Central and East Africa.

East Africa also contributed to meet net imports of other regions in coffee and tea and four nonfood product categories (live plants, cut flowers, and foliage; tobacco and manufactured tobacco substitutes; hides and skins; and cotton and other vegetable textile fibers). The region's large net exports of coffee and tea (US$426 million)—combined with that of West Africa (US$32 million)—supplied all of the net import demand of North Africa (US$417 million), Southern Africa (US$32 million), and Central Africa (US$9 million). Tobacco and manufactured tobacco substitutes are East Africa's second highest net export (US$237 million), supplying all of the net import demand of North Africa (US$113 million), Central Africa (US$104 million), Southern Africa (US$17 million), and West Africa (US$3 million).

Apart from tiny net exports of residues and waste (US$10 million) and cotton and other vegetable textile fibers (US$0.5 million), Central Africa participates in intracontinental markets of agricultural products as a net importer.

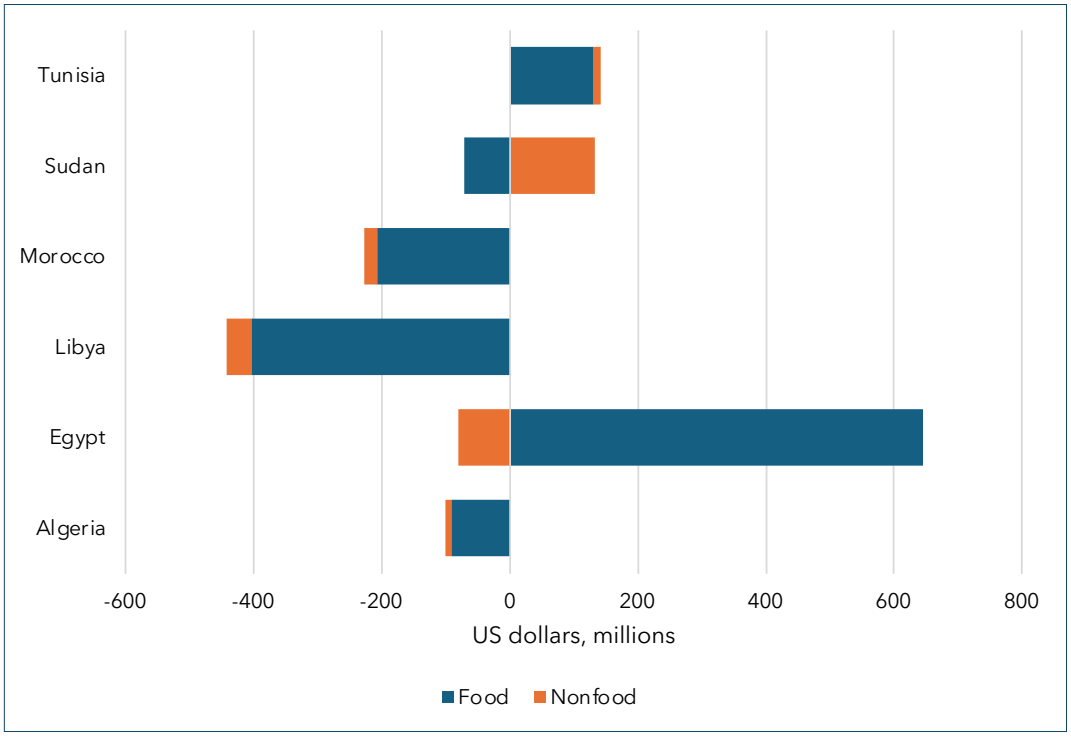
In sum, the preceding analysis reveals clear regional patterns. Southern Africa is the principal net exporter of cereals, oilseeds, and vegetable oils, edible fruits and nuts, dairy, meat, and processed foods, meeting most of the net food trade deficits in intra-African markets. North Africa is the largest net exporter of fish, sugars and sugar confectionery, and vegetables, and the largest net importer of coffee, tea, and tobacco and manufactured tobacco substitutes. West Africa dominates net exports of cotton and other vegetable textile fibers (a nonfood product), cocoa and chocolate (a nonstaple food), and shellfish, as well as net imports of edible fruits and nuts, vegetables, and hides and skins. In contrast, Central and East Africa are consistently net importers across most staple and processed food groups. This distribution highlights the importance of strengthening regional trade policies and supply chains to ensure food availability and resilience across the continent.

Intraregional trade balances

Figures 2.8–2.12 present the net trade positions of African countries in their regional markets for food and nonfood products from 2019 to 2023.

Egypt and Tunisia are net exporters of food, with food trade surpluses amounting to US$645 million and US$130 million, respectively (Figure 2.8), establishing Egypt's critical role as a regional supplier of food, primarily vegetables and cereals. Tunisia's net intraregional exports are in edible fruits and nuts, and oilseeds and vegetable oils. Sudan is remarkable with net exports of nonfood products, mostly cotton and other vegetable textile fibers. Conversely, Libya, Algeria, and Morocco are net importers of food products, illustrating their underlying limitations in local agrifood production (OECD and FAO 2023). Despite its net food trade deficit, Morocco has a net trade surplus of fish in the intraregional market (US$24 million).

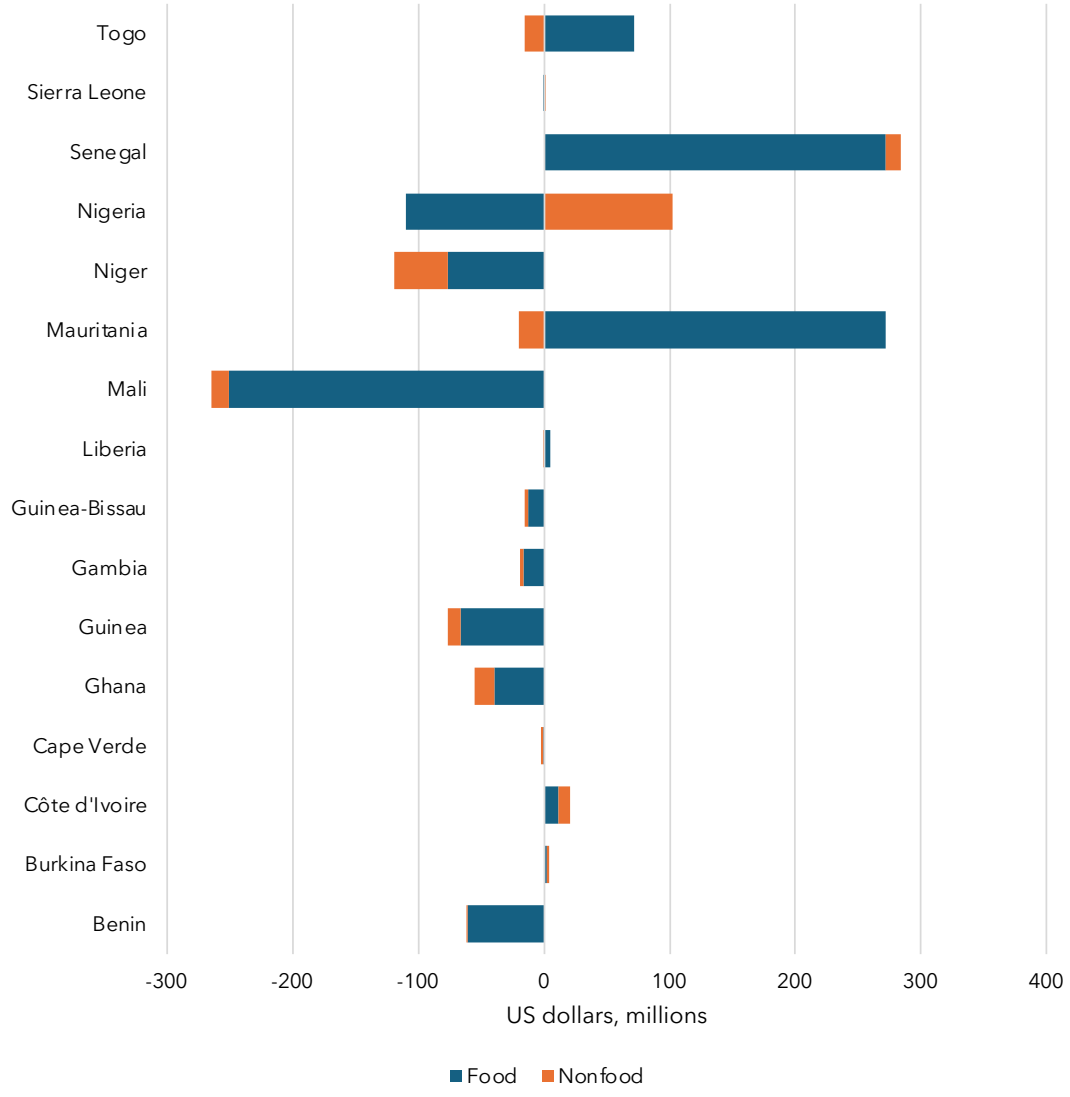
Figure 2.8 Net intraregional export values, North African countries, 2019–2023 average



Source: Authors' calculations based on the AATM 2025 database.

Mauritania and Senegal emerge as leading net food exporters within West Africa (Figure 2.9). Their substantial positive balances in intraregional fish trade indicate an ability to produce surpluses above domestic needs, supporting food security and trade integration in the region. Togo also demonstrates notable net food exports, primarily in oilseeds and vegetable oils, indicating expanding agricultural output and its rising significance in West African trade dynamics (Bini 2018). Several countries—including Mali, Nigeria, Niger, and Guinea—faced the largest deficit during the period 2019–2023. Liberia and Benin similarly display substantial net food trade deficits, with a particularly pronounced deficit for Liberia. These negative balances represent persistent food supply constraints stemming from factors such as limited agricultural productivity, rapid population growth, and trade or market barriers (Zhou and Staatz 2016; Bini 2018). Nigeria is the leading net exporter of nonfood products, particularly tobacco, and Niger the largest net importer.

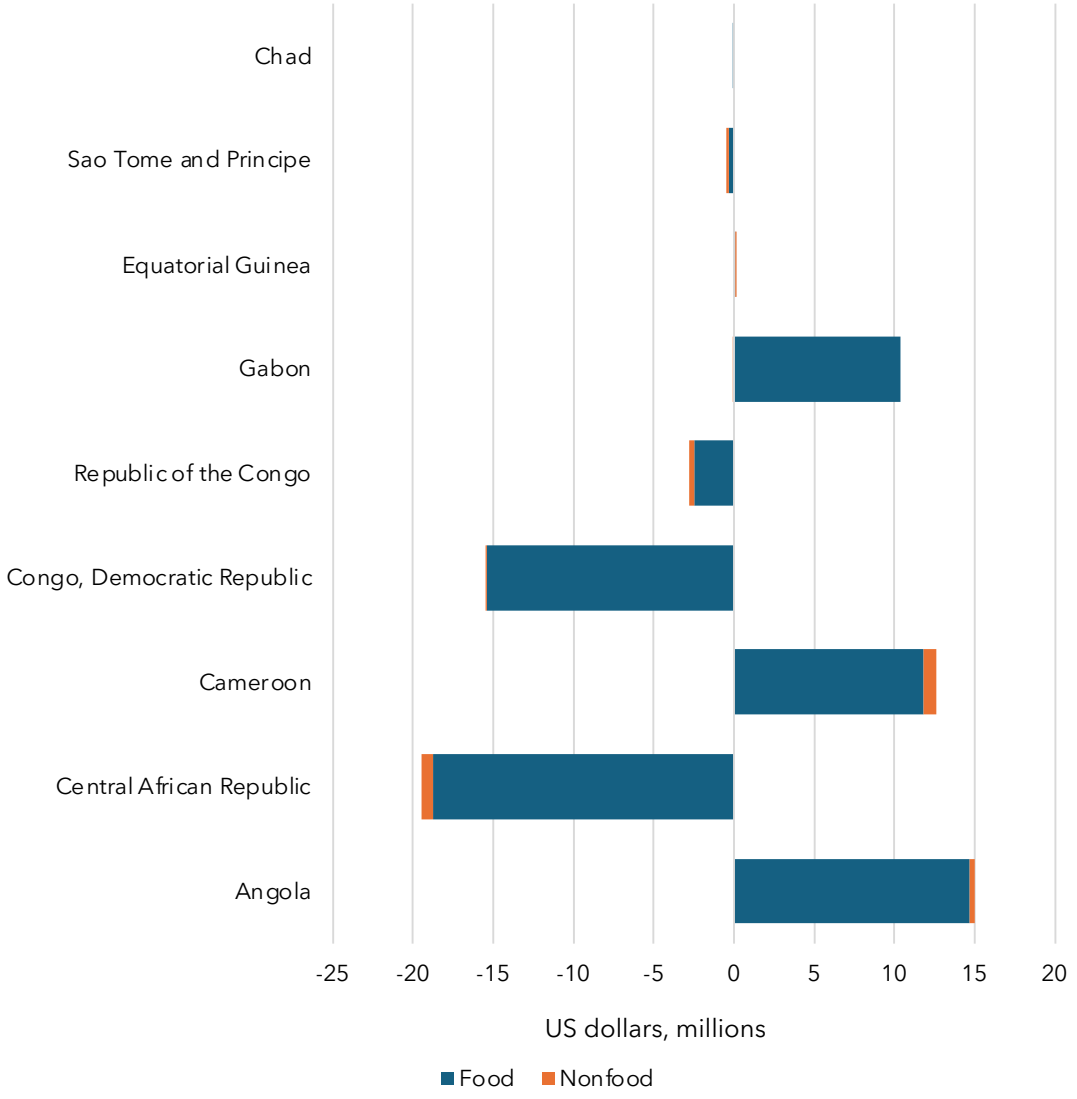
Figure 2.9 Net intraregional export values, West African countries, 2019–2023 average



Source: Authors' calculations based on the AATM 2025 database.

Angola, Cameroon, and Gabon are Central Africa's leading net food exporters (Figure 2.10). Angola's trade surplus is due to a combination of export-oriented agricultural and fishery production and relative competitiveness in regional markets (Rabo Partnerships 2023; Bouët and Odjo 2019). Cameroon's net food surplus arises from diversified production and a more integrated role in regional trade (World Bank Group 2018). In contrast, the Central African Republic (CAR) and the Democratic Republic of the Congo (DRC) are significant net food importers, given structural supply gaps and obstacles that limit their ability to meet domestic demand through local output (Walkenhorst 2006; FAO 2023a). Chad, Equatorial Guinea, São Tomé and Príncipe, and the Republic of the Congo report near-balanced or marginal food trade positions, reflecting the small scale and volatility of intraregional trade. Nonfood trade is minimal across most Central African countries, with only Cameroon and Angola registering nonfood net exports.

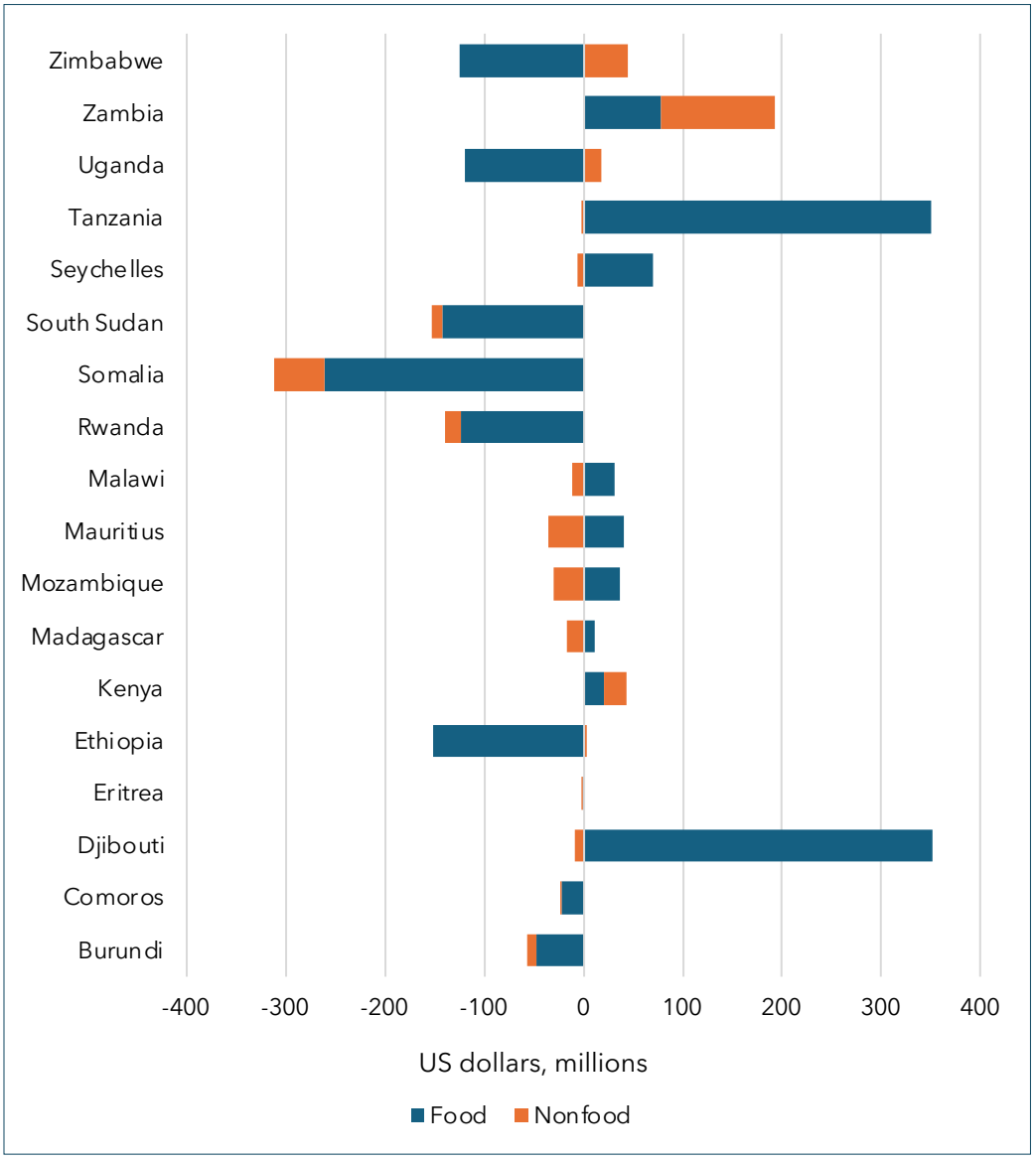
Figure 2.10 Net intraregional export values, Central African countries, 2019–2023 average



Source: Authors' calculations based on the AATM 2025 database.

Tanzania stands out as East Africa's dominant net exporter of food, with a substantial surplus nearing US$400 million, including primarily net exports of cereals (US$258 million) (Figure 2.11). This reflects Tanzania's leading role in supplying regional agricultural markets and demonstrates the effectiveness of its agrifood sector in intraregional trade integration. Djibouti and Zambia also display significant positive food balances, driven by the former's strategic position as a trade hub and the latter's diversified agricultural output. Djibouti's largest net intraregional exports are of oilseeds and vegetable oils (US$242 million), while Zambia's are of sugar (US$39 million). Somalia exhibits the largest net food trade deficit. Uganda, Zimbabwe, Rwanda, and Ethiopia also post pronounced food trade deficits, highlighting persistent local supply constraints or vulnerability to external shocks. A cluster of countries—Malawi, Mauritius, Mozambique, Madagascar, Kenya, Eritrea, Comoros, and Burundi—register marginal surpluses or deficits, indicating either limited trade scale or balanced supply-demand dynamics.

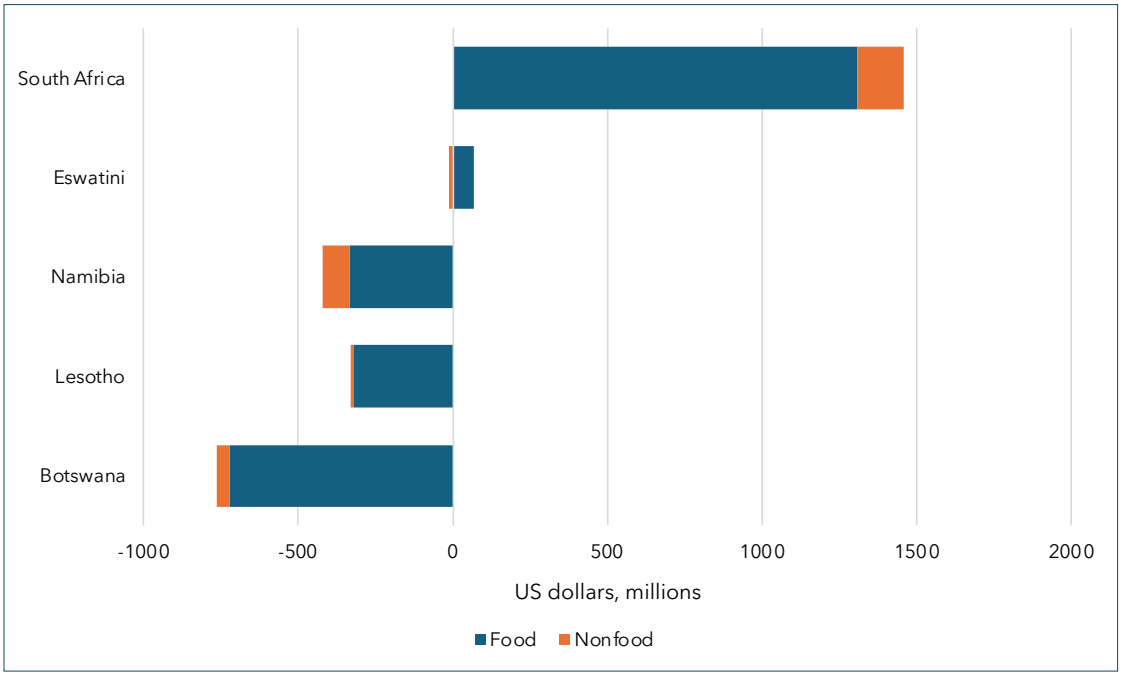
Figure 2.11 Net intraregional export values, East African countries, 2019–2023 average



Source: Authors' calculations based on the AATM 2025 database.

South Africa is by far the leading net exporter of both food and nonfood products, with an intraregional export surplus that dwarfs every other Southern African country (Figure 2.12). Its vast positive balance signals a diversified, high-capacity agrifood and industrial sector supplying a broad range of goods to the region. South Africa's agricultural exports form the backbone of Southern Africa's trade integration, playing a stabilizing role in continental food security and market supply. Its largest net intraregional exports consist of cereals (US$360 million) and beverages (US$295 million). In sharp contrast, Botswana registers a substantial food trade deficit, with the largest net food imports in the region (US$722 million), including primarily beverages (US$166 million). Namibia and Lesotho also post food trade deficits. Nonfood trade is a small but sometimes positive component for countries like South Africa.

Figure 2.12 Net intraregional export values, Southern African countries, 2019–2023 average



Source: Authors' calculations based on the AATM 2025 database.

5. Conclusion

Intra-African agricultural trade experienced significant growth from 2003 to 2023, with trade values increasing more than threefold. This growth has been resilient to global economic shocks such as the 2008 financial, food, and energy crisis and the COVID-19 pandemic. The latter shows the strategic role of regional markets as reliable sources of food during times of global supply chain disruptions. Despite this growth in absolute terms, the share of intra-African agricultural trade in Africa's overall agricultural trade portfolio fluctuated, peaking around 2013 due to regional integration efforts but later declining.

The composition of intra-African agricultural trade is heavily dominated by food products, which consistently account for about three-quarters to four-fifths of trade over the two decades. This food dominance reflects the trade network's crucial role in addressing food security within the continent, contrasting with Africa's global trade, which is more focused on export crops for international markets. The stable food-centric trade pattern reveals complementary agroecological zones, shared dietary preferences, and food security imperatives as key drivers.

One of the most concerning findings is the stark imbalance between intra-African agricultural trade and Africa's global trade, with extracontinental imports reaching nearly five times the value of intra-African trade by 2023. Heavy dependence on food imports exposes the continent to vulnerabilities and reflects long-standing colonial legacies that reoriented African economies toward raw material exports rather than self-sufficient regional food systems. It also calls for urgent strengthening of regional production and trade systems to enhance food security and economic resilience.

Notable progress is evident in the significant increase in the share of processed agricultural products in intra-African trade, reflecting policy efforts to promote value addition and agro-industrialization. Nevertheless, a large share of trade in staple foods such as cereals, fish, and meat remains in unprocessed or semi-processed forms.

Intra-African agricultural trade reveals significant regional imbalances, with Southern Africa consistently maintaining the strongest position as a net exporter, achieving approximately US$2.5 billion in net exports by 2023. North Africa's transition from having a net agricultural trade deficit in the early 2010s to a regional surplus of about US$577 million by 2023 reflects the tangible impact of targeted policy reforms, infrastructure modernization, and investment in agricultural productivity. Notably, Egypt, Morocco, and Sudan implemented large-scale programs that improved irrigation efficiency, land use, and value chain integration. Egypt's Sustainable Agricultural Development Strategy 2030 and its New Delta Project expanded cultivated land and strengthened export competitiveness through better water management and logistics infrastructure. Similarly, Morocco's Plan Maroc Vert (2008–2020) and its successor, Génération Green 2020–2030, increased yields and diversified export crops through public–private partnerships and rural investment schemes. Across the subregion, governments also strengthened trade facilitation and regional integration, leveraging the AfCFTA and existing RECs to enhance market access and intra-African trade in agricultural goods (AfDB 2023).

Central, West, and East Africa participate in intracontinental markets mostly as net importers, with persistent deficits often exceeding US$1 billion annually. These might reflect structural challenges, including inadequate infrastructure, fragmented markets, and underdeveloped value chains that limit their agricultural competitiveness.

Building on these regional patterns, clear specializations emerge across product categories. Southern Africa dominates exports of cereals, dairy, meat, and processed foods, serving as the continent's primary supplier of staple products. Similarly, West Africa leads in cocoa and horticultural exports, while North Africa excels in fish, vegetable, and fruit exports. East Africa specializes in the export of coffee, tea, and floriculture. Conversely, Central and East Africa are consistently net importers across most food groups, with East Africa accounting for over 70 percent of continental cereal deficits and more than 80 percent of oilseed shortfalls.

At the country level, trade performance varies dramatically within these regional frameworks. In North Africa, for instance, Egypt emerges as the principal food exporter while Libya, Algeria, and Morocco face persistent deficits. Likewise, Mauritania and Senegal are leading exporters in West Africa, whereas Liberia, Nigeria, and Niger experience significant shortfalls. Central Africa's trade is dominated by modest exporters Angola and Gabon, while the DRC and CAR are net importers. East Africa is polarized between Tanzania's substantial food surplus and Somalia's net intraregional imports. Southern Africa's trade structure, however, centers entirely on South Africa's overwhelming export dominance, with neighbors such as Botswana, Namibia, and Lesotho participating in regional markets as net importers.

Based on the finding that intra-African agricultural trade is resilient and strategically vital for food security and remains dwarfed by extracontinental imports, policy must prioritize regional self-sufficiency. Specific policies under the AfCFTA should aggressively reduce nontariff barriers and streamline customs procedures to make regional trade more attractive than global imports, thereby shielding the continent from external supply shocks. Given the heavy dominance of food products in intra-African trade and the severe import dependence of regions like East and Central Africa, policy must directly address structural production gaps. Consequently, targeted investments in climate-resilient agriculture and input systems are essential for deficit regions, focused specifically on closing East Africa's cereal and oilseed shortfalls to enhance continental food security. This requires not only better trade rules, but also innovation in irrigation, farm-level water management, and production planning so that farmers can raise yields, stabilize output, and respond more effectively to new market opportunities created by the AfCFTA.

To sustain the notable progress in processed agricultural trade, policy must channel investment into addressing the specific infrastructure gap, prioritizing cold chains, storage facilities, and processing plants in key agricultural corridors to reduce postharvest losses and capture more value within the continent. The stark regional imbalances—with Southern Africa a dominant net exporter and Central, West, and East Africa net importers—reveal systemic geographic disparities in trade capacity. Accordingly, policy should promote complementary regional specialization, facilitating partnerships where surplus regions like Southern Africa invest in productive capacity and infrastructure in deficit regions to create a more balanced and integrated continental market.

North Africa's remarkable transformation from a net food deficit to a surplus region offers valuable lessons for other parts of the continent. These successes should be systematically documented and shared as best practices to inform policy and investment strategies elsewhere. Furthermore, joint ventures between North African agribusinesses and Sub-Saharan African food processors could facilitate the transfer of critical technologies and managerial expertise across regions. Given that the AfCFTA framework provides the institutional foundation for continental integration, despite facing implementation challenges, an AfCFTA Agricultural Trade Monitoring Dashboard is needed to track monthly trade flows and identify bottlenecks.

The key lessons for other African regions are clear: sustained growth in intraregional trade requires not only production capacity but also coordinated policies that link productivity gains to market development. North Africa's experience demonstrates the importance of combining infrastructure investment (irrigation, transport, storage) with regulatory reforms that reduce trade barriers and promote agro-processing. Moreover, aligning national agricultural strategies with continental frameworks such as the Comprehensive Africa Agriculture Development Programme will help attract investment and harmonize standards, thereby fostering regional competitiveness. Other regions can replicate this model by investing in climate-smart agriculture, logistics infrastructure, and regional value chains to strengthen both trade performance and food system resilience.

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Appendix 2.1

Table A2.1 Food and nonfood products categorization and HS codes

Product categories	HS Chapters	HS Headings	HS Codes
Food products			
Live farm animals	01	0102 - 0105	All except 010221, 010231, and 010310
Meats and edible offals	02	0201 - 0210	All except 020910 and 020990
	16	1601 - 1603	All
Dairy and eggs	04	0401 - 0408	All
Fish	03	0301 - 0305	All except 030111 and 030119
	16	1604	All
Shellfish	03	0306 - 0308	All
	16	1605	All
Animal fats	02	0209	020910 and 020990
	15	1501 - 1504, 1506, and 1516	All except 151620
Vegetables	07	0701 - 0714	All except 070110
	11	1105, 1106, and 1108	All except 110630, 110811, and 110812
	20	2001 - 2005	All
Edible fruits and nuts	08	0801 - 0814	All
	11	1106	110630
	20	2007 and 2008	All
Juices	20	2009	All
Coffee and tea	09	0901 - 0903	All
	21	2101	All
Cocoa and chocolate	18	1801, 1803 - 1806	All
Cereals	10	1001 - 1008	All except 100111, 100191, 100210, 100310, 100410, 100510, 100710, 100821, and 100830
	11	1101 - 1104 and 1107 - 1109	All except 110813, 110814, 110819, and 110820
Oilseeds and vegetable oils	12	1201 - 1208	All except 120110, 120230, 120721
	15	1507 - 1517	All except 151610
Food preparations	19	1901 - 1905	All
Sugars and sugar confectionery	17	1701 - 1704	All
Beverages	22	2201 - 2206, 2208, and 2209	All

Table A2.1 Food and nonfood products categorization and HS codes (cont'd)

Other edible products	04	0409 and 0410	040900 and 041000
	05	0504	050400
	06	0602	060220
	09	0904 - 0910	All
	11	1108	110819 and 110820
	12	1210 and 1212	All except 121229
	13	1301 - 1302	All
	16	1603	160300
	20	2006	200600
	21	2102 - 2106	All
	33	3301	All
	35	3502	All
Nonfood products			
Live plants, cut flowers, and foliage	06	0601 - 0604	All except 060220
Seeds	12	1209	All
		1201, 1202, 1207	120110, 120230, and 120721
	07	0701	070101
	10	1001 - 1005, 1007, and 1008	100111, 100191, 100210, 100310, 100410, 100510, 100710, 100821, and 100830
Residues and waste	23	2301 - 2309	All
	12	1213 and 1214	121300, 121410, and 121490
	18	1802	180200
Tobacco and manufactured tobacco substitutes	24	2401 - 2403	All
Hides and skins	41	4101 - 4103	All
	43	4301	All
Animal fibers	50	5001 - 5003	All
	51	5101 - 5103	All
Cotton and other vegetable textile fibers	52	5201 - 5203	All
	53	5301 - 5302	All
	14	1404	140420

Table A2.1 Food and nonfood products categorization and HS codes (cont'd)

Other nonfood products	01	0101	All
		0102	010221 and 010231
		0103	010310
		0106	All
	05	0501, 0502, 0505 - 0508, 0510, and 0511	All
	12	1211	All
		1212	121229
	14	1401 and 1404	All except 140420
	15	1505, 1518, 1520 - 1522	All
	22	2207	All
	29	2905	All
	35	3501, 3503 - 3505	All
	38	3809	All

Source: Authors' elaboration based on the list of products under the WTO definition of Agriculture + Fisheries products. Note: HS = Harmonized System.

Table A2.2 Regional groupings of African countries

North Africa	Algeria, Egypt, Libya, Morocco, Sudan, Tunisia
West Africa	Benin, Burkina Faso, Cape Verde, Côte d'Ivoire, The Gambia, Ghana, Guinea, Guinea-Bissau, Liberia, Mali, Mauritania, Niger, Nigeria, Senegal, Sierra Leone, Togo
Central Africa	Angola, Cameroon, Central African Republic, Chad, Republic of the Congo, Democratic Republic of the Congo, Equatorial Guinea, Gabon, São Tomé and Príncipe
East Africa	Burundi, Comoros, Djibouti, Eritrea, Ethiopia, Kenya, Madagascar, Malawi, Mauritius, Mozambique, Rwanda, Seychelles, Somalia, South Sudan, Tanzania, Uganda, Zambia, Zimbabwe
Southern Africa	Botswana, Lesotho, Namibia, South Africa, Swaziland

Source: United Nations geoscheme. https://en.wikipedia.org/wiki/United_Nations_geoscheme