

# Africa Agriculture Trade Monitor 2025



Edited by Sunday Odjo, Fousseini Traoré, and Chahir Zaki

*The 2025 Africa Agriculture Trade Monitor (AATM) investigates critical topics related to Africa's trade in agricultural products.* As in previous editions of the report, we developed a database that corrects discrepancies in official trade flow values, as reported by importing and exporting countries; this database serves as the basis for analyzing Africa's international, domestic, and regional trade. Following the 2024 report's examination of the nexus between climate change and the environment, this year's report focuses on food security and its linkage with global and intra-African trade.

*Developing agricultural trade at both the international and regional levels is imperative, given the scale of food insecurity on the continent.* Chapter 1 explores recent trends in African agricultural trade from a food security perspective. Over the last decade, the prevalence of moderate and severe food insecurity among Africa's total population has increased by 30 percent and 32 percent, respectively, a pattern that can partially be explained by trade developments. At the global level, Africa's share in agricultural trade is still the lowest worldwide, despite its comparative advantage. As a result, its import dependence has increased, especially in cereals, oils, and sugar. Fruit, nuts, and some traditional cash crops represent the majority of exports, especially those from South Africa, Morocco, Côte d'Ivoire, and Egypt. Additionally, Africa still has the world's highest tariff levels, leading to an equally high level of food insecurity. Low diversification among suppliers of imported products also increases the vulnerability of the continent's countries. These results are corroborated by a modified version of the Food Import Vulnerability Index, which considers the concentration of import markets. This index provides a framework for assessing how the structure of agricultural imports affects a country's food vulnerability.

*Despite several external shocks, intra-African agricultural trade tripled between 2003 and 2023.* Chapter 2 analyzes intraregional African trade, showing that it was dominated by regional markets representing more reliable sources of food amid global supply chain disruptions, such as the COVID-19 pandemic and the Russia-Ukraine conflict. However, Africa remains heavily dependent on food imports from the rest of the world. At the regional level, intra-African trade is unevenly distributed, with Southern Africa dominating exports (cereals, dairy, meat, and processed foods) and North Africa displaying a large surplus (fish, vegetables, and fruits). Central, West, and East Africa remain net importers with persistent deficits. Policies that prioritize regional self-sufficiency should be pursued more actively, particularly within the framework of the African Continental Free Trade Area (AfCFTA). This would entail streamlining customs procedures, reducing intraregional nontariff barriers, and addressing structural production gaps. Together, these measures could strengthen regional trade and significantly enhance food security across African countries.

*Rice consumption is likely to increase significantly, though supply will grow at a slower pace.* Given the importance of rice as a strategic commodity for food security, this year's AATM features an analysis of the rice value chain. Chapter 3 shows that Africa has consistently been a net importer of rice in recent decades. During the 2019–2023 period, rice accounted for one-quarter of the continent's total trade deficit in cereals, on average. The rice value chain involves millions of small-scale farmers, with women predominant in the labor force. Given its economic and social importance, the sector received various market price support measures and subsidies to producers. Amid increases in population, income, and urbanization, rice consumption will likely rise significantly, though supply will grow at a slower pace. Africa is expected to be the largest rice-importing region by 2035. Policies to increase the supply of

rice should aim to boost resilience and productivity by improving water-use efficiency and developing drought-resistant varieties. To help reduce demand for rice, governments should also prioritize policies that promote the consumption of fruits and vegetables and make healthy diets more affordable.

*Enhancing the intra-African trade of fertilizers is a beneficial strategy for responding to external shocks and policy uncertainty.* Although Africa is a net exporter of fertilizers, primarily from Morocco and Egypt, the continent still relies heavily on imports, mainly to Benin, Nigeria, and the Central African Republic, and especially for nitrogen and potash. In addition, fertilizer application rates are among the lowest in the world, which helps to explain the region's low crop yields. While fertilizer use affects yields, which in turn influence food availability and food security, changes in food security and agricultural performance also affect fertilizer import and export demand, thereby influencing subsequent levels of fertilizer use. Our findings show that fertilizer consumption and imports are positively correlated with cereal yields, which are a key product for food security. This is why we also observe a negative correlation between fertilizer consumption and the prevalence of undernourishment.

*As a critical determinant of food security, trade must be examined alongside regional and continental trade agreements.* Chapter 5 assesses the performance and trade effects of African regional trade agreements, with a particular focus on the AfCFTA. The chapter examines whether existing regional frameworks act as conduits or constraints to deeper trade integration. Overall, integration remains uneven and differs by sector across regions. Regions such as SADC,<sup>1</sup> TFTA,<sup>2</sup> and WAEMU<sup>3</sup> exhibit relatively high and stable intraregional trade levels, particularly in processed agricultural products. However, CEMAC,<sup>4</sup> ECCAS,<sup>5</sup> and AMU<sup>6</sup> remain weakly integrated. This chapter also offers insights into the tariff structure and depth of the regional agreements. Although tariffs within regional economic communities (RECs) are generally low or nonexistent, tariffs between RECs remain high. Many agreements include provisions in areas within the World Trade Organization mandate (WTO-plus) and beyond it (WTO-X), such as services, technical standards, and institutional cooperation, but their enforceability varies widely. WTO-X provisions on agriculture and product standards have the most substantial effects on trade flows, yet their application remains inconsistent across regions. An ex ante simulation using a gravity model shows that most African RECs could act as building blocks for Africa-wide integration (continentalism). To achieve the AfCFTA's full potential, regional disparities and fragmentation should be considered, with a special focus on deepening legal commitments, reducing inter-REC barriers, and investing in infrastructure.

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<sup>1</sup> Southern African Development Community.

<sup>2</sup> Tripartite Free Trade Area.

<sup>3</sup> West African Economic and Monetary Union.

<sup>4</sup> Economic and Monetary Community of Central Africa.

<sup>5</sup> Economic Community of Central African States.

<sup>6</sup> Arab Maghreb Union.

The 2025 Africa Agriculture Trade Monitor (AATM) examines recent trends in Africa's global and regional trade. With its updated statistics and data, the AATM serves as a comprehensive tool for monitoring Africa's participation in global trade and the progress made in intra-African trade and regional integration. This year's AATM focuses on trade and food security, including the continent's high dependency on world markets for key staples and the potential of regional trade, as well as related bottlenecks. The report also provides a detailed analysis of the rice value chain, a key commodity that contributes to food security but faces significant challenges. This edition of the AATM also features an innovative analysis of the fertilizer sector's role as a key input in agricultural production and its links with food security. Given the debate over trade integration in Africa, the report examines whether existing regional trade agreements support or hinder deeper continental integration and what can be expected from the African Continental Free Trade Area (AfCFTA). This concluding chapter discusses the report's main findings and related policy implications.

The report begins by examining recent trends in Africa's agricultural trade. The first chapter highlights the increasing prevalence of food insecurity, which has been exacerbated by recent crises, including the COVID-19 pandemic and the Russia-Ukraine war. The weakness of domestic food systems and growing demand have led to a heavy reliance on imports for basic products such as cereals, which are also subject to high price volatility in international markets. Africa primarily exports fruit, nuts, and traditional cash crops, which have a more stable market value. New trading partners have begun to play a greater role, primarily those from emerging economies such as China, Saudi Arabia, Brazil, and India. However, African agricultural exporters still face substantial nontariff measures that impede their access to global markets, particularly with some of their most important partners, such as Europe, whose measures are among the most restrictive in the world. As highlighted in previous editions of the AATM, Africa also has the world's highest tariffs, even for agrifood products, which can contribute to food insecurity. In addition, Africa's import partners are concentrated, creating another layer of vulnerability. Low diversification among suppliers of imported products reduces the continent's resilience to external shocks, as indicated by the Food Import Vulnerability Index, which this analysis modified to integrate import market concentration as an additional component.

Intra-African trade has long been at the forefront of policy debates, especially its contribution to food security. This year's AATM examines this important relationship, showing that contrary to common views, the linkage between trade and food security is neither guaranteed nor uniformly positive. The growth of intra-African agricultural trade over the past decade has shown resilience to global economic shocks such as the 2008 financial, food, and energy crisis and the COVID-19 pandemic. Thus, increasing intra-African trade can be a coping strategy for global crises and supply chain disruptions. While a large portion of agrifood trade occurs in unprocessed or semi-processed forms, the increasing share of processed agricultural products is a positive development, especially for the promotion of value addition and agro-industrialization. The report finds significant disparities across African regions: while Southern Africa has consistently maintained a trade surplus as a net exporter, the opposite is true for Central, West, and East Africa, which continue to be net importers with persistent trade deficits. The case of North Africa serves as a valuable example for the rest of the continent: in a remarkable transition, the region shifted from a deficit in the early 2010s to a surplus due to targeted policy reforms, increased agricultural investment, and modernized infrastructure. Yet, complementary measures are required, beyond increasing production. Coordinated policies at the regional and continental levels that connect productivity gains to market development are necessary to boost regional trade by combining infrastructure investment, such as irrigation, transport, and storage, with regulatory reforms that reduce trade barriers and promote agro-processing.

These policies would allow countries to achieve the full potential of the Comprehensive Africa Agriculture Development Programme (CAADP) and the AfCFTA, thereby enhancing food security by increasing availability and stabilizing domestic food markets.

This edition of the AATM gives special attention to rice, a key staple for which demand is expected to grow significantly over the coming decades due to the combined effects of population growth, rising incomes, and urbanization. As production is expected to grow at a slower pace due to lower yields and inefficient practices, Africa will continue to run a trade deficit in rice, which already accounts for one-quarter of its total trade deficit in cereals. With climate change, this deficit is expected to worsen for most regions, as the continent's general situation is expected to deteriorate relative to the rest of the world. Given the strategic importance of rice, however, the sector has also benefited from significant policy support over the past two decades, including direct support to trade and markets, and regulatory measures in the form of trade bans, apart from periods of global crisis when policy support shifted to maintain low prices for consumers. Thus, Africa must balance multiple priorities: Some countries should focus on increasing water-use efficiency through intelligent irrigation systems by using real-time data and artificial intelligence, in addition to developing drought-resistant varieties. Other countries are already consuming more than necessary for a healthy diet and should diversify dietary patterns by promoting complementary sectors such as fruits and vegetables.

This year's report also features an examination of the role of fertilizer in achieving food security. While fertilizers play a crucial role in agricultural production by enhancing productivity and therefore contributing to food availability, a key element of food security, Africa's agricultural systems continue to use low levels of fertilizer. Use intensity is far below the 50 kg/ha target set in the African Union's 2006 Abuja Declaration; this contributes to agriculture's slow development, with yields among the lowest in the world. Although the continent is characterized by low fertilizer use, it is a significant producer and exporter of fertilizer products, due to natural endowments of oil, natural gas, and phosphate in countries such as Morocco, Egypt, Algeria, and Nigeria. Due to these natural resources and investments in key countries, Africa has been a net exporter of fertilizers since 2016. However, the continent still imports a large quantity of fertilizers. This huge dependence on imports, especially potash, creates vulnerability to supply chain disruptions, such as the Russia-Ukraine war and subsequent trade restrictions adopted by key global exporters. Enhancing intra-African trade would be a beneficial coping strategy to deal with external shocks and policy uncertainty. A correlation analysis shows a negative relationship between fertilizer consumption and food insecurity, as they increase crop yields, food availability, and food access. This is why a positive association is observed between fertilizer consumption, trade, and cereal yields. However, the use of imported fertilizers can make importing countries more vulnerable to external shocks.

The last chapters of previous AATMs have each highlighted a specific regional economic community (REC). This year, the final chapter goes a step further to consider whether continental integration under the AfCFTA will be supported or hindered by Africa's existing regional trade agreements, which constitute the foundation of most RECs and, thus, affect the AfCFTA's contribution to food security. The results show a fragmented picture of regional integration: although regions such as the SADC, TFTA, and WAEMU are relatively well integrated, linkages remain weak between CEMAC, ECCAS, and AMU. An analysis of the tariff structure confirms the findings of previous AATM editions: tariffs are low or nonexistent within RECs but high between them, often exceeding the average duties applied to external partners. Analyzing the depth of regional trade agreements also reveals that while most agreements include provisions for areas within the mandate (WTO-plus) and beyond it (WTO-X), such as services or technical

standards, their enforceability varies significantly across RECs. Vertical commitments to WTO-X provisions, such as for agriculture and product standards, have the most substantial effects on trade flows, yet their application remains inconsistent across regions. A prospective analysis using a gravity model shows that substantial gains could be achieved under the AfCFTA if the commitments are fully implemented and legally enforceable. The chapter concludes that most African RECs support the development of continental trade, especially in agriculture. However, realizing the full potential of the AfCFTA will require considering the heterogeneous nature of RECs, and policy efforts should focus on deepening legal commitments, reducing inter-REC barriers, investing in infrastructure, and supporting regulatory convergence.