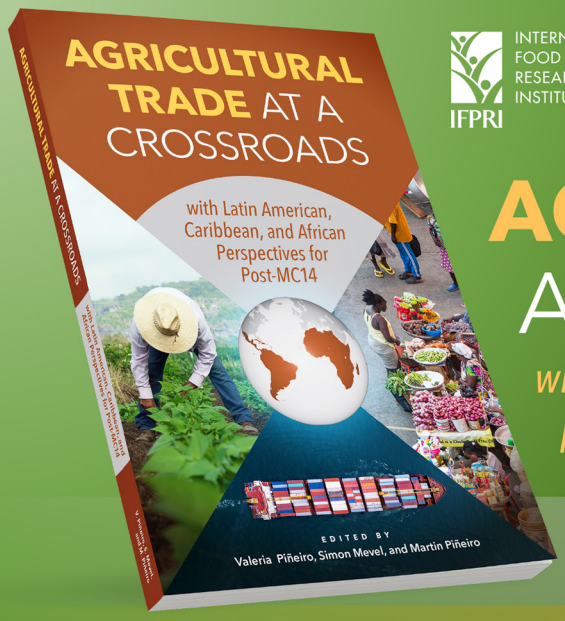


INTERNATIONAL FOOD POLICY RESEARCH INSTITUTE

ECA

CGIAR POLICY INNOVATIONS

AGRICULTURAL TRADE AT A CROSSROADS

with Latin American, Caribbean, and African Perspectives for Post-MC14

SECTION III – Africa: Regional Perspective

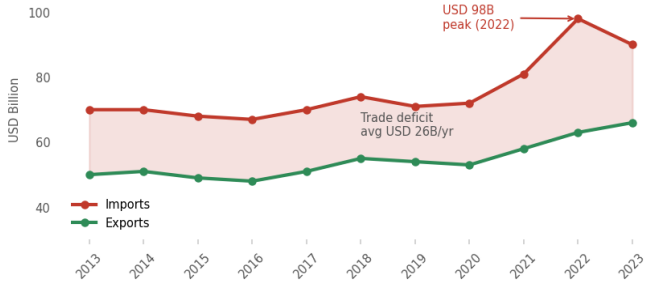
KEY MESSAGES

This policy brief summarizes the main findings and policy messages from the Africa section of the book *Agricultural Trade at a Crossroads: with Latin American, Caribbean, and African Perspectives for Post-MC14*. It highlights the continent's growing importance in global agricultural trade and examines persistent challenges related to food insecurity, agricultural trade deficits, limited export diversification, infrastructure gaps, and high trade costs. It also explores the opportunities associated with regional integration through the African Continental Free Trade Area (AfCFTA), improved trade facilitation, productivity growth, and stronger participation in regional value chains. In a global environment increasingly shaped by geopolitical tensions, climate pressures, and trade fragmentation, the book underscores the importance of strengthening competitiveness, enhancing resilience, advancing food security objectives, and promoting a more balanced and development-oriented multilateral trading system.

USD 26B	**USD 98B**	**< 20%**	**57.9%**	**+44.5%**	**USD 3T**
Avg. annual trade deficit (2013–23)	Africa import peak (2022)	Intra-African agri-trade share	Food insecurity rate (2022–24)	AfCFTA: intra-African exports by 2045	Cumulative AfCFTA intra-trade gain

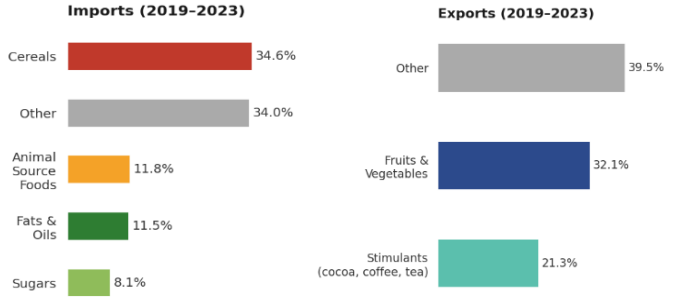
TRADE PERFORMANCE

Persistent agricultural trade deficit (2013–23)



Source: COMTRADE and authors.

Africa's trade composition



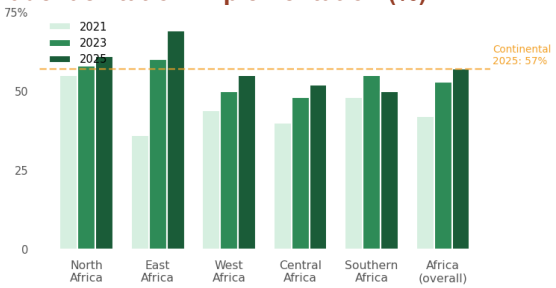
Source: AATM 2025.

- Exports grew at 3%/year — driven by price effects, not productivity
- Rice demand growing at 6%/year; Africa projected to be world's largest rice importer by 2035.
- Africa exports low-nutrient commodities (cocoa, coffee, cotton); imports processed, nutrient-rich foods.
- Informal cross-border trade (ICBT) estimated at 10–60% of agri-flows — real integration is thus higher than reported.

- Exports: Africa is the second least diversified exporter globally, highly concentrated on a few commodities: fruits and vegetables, and stimulants.
- Imports: Africa's dependence is also concentrated, with cereals dominating: wheat (51%) and rice (26%).
- Rice has become the fastest-growing staple food in Africa, with demand increasing at ~6% annually.

TRADE FACILITATION AND AfCFTA PROJECTED GAINS

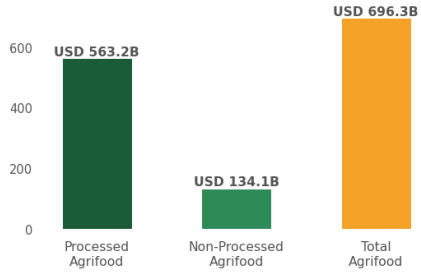
Agri-trade facilitation implementation (%)



Source: UNTF Survey on Digital & Sustainable Trade Facilitation 2025.

- Continental average reached 57% in 2025 (+15 pp since 2021).
- Critical bottleneck: digital sanitary and phytosanitary certification, only 12% full implementation.
- Eastern Africa: fastest reformer (+33 pp); Southern Africa backslid (55%→50%).
- Africa still trails Southeast Asia (67%) and South Asia (63%).

Cumulative agrifood trade gains 2021–45 (USD B)

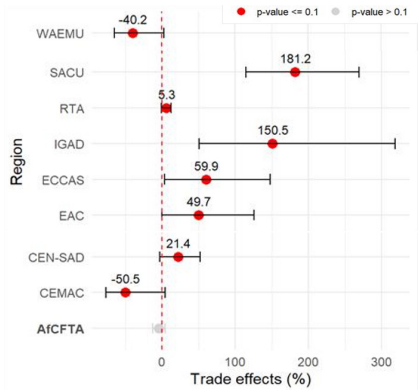


Source: ECA/CEPII CGE simulations

- Intra-African trade share: 15% → ~25% by 2045.
- Processed agrifood drives genuine value chain formation; non-processed expands in volume only.
- Gains require US$121 billion in transport infrastructure (roads, rail, ports, air).
- AfCFTA could also add ~0.14% in cumulative greenhouse gas emissions — a modest cost vs. economic gains.

.REGIONAL INTEGRATION AND WTO NEGOTIATIONS

Agricultural trade effects by REC (1995–2024)



Source: Authors, based on PPML Gravity Model.

- SACU (+180%) and IGAD (+150%): deepest agrifood integrators, agriculture outperforms aggregate trade.
- WAEMU (−40%): formal agreements do not automatically facilitate trade.
- WTO membership amplifies weak regional arrangements (e.g., CEMAC: region×WTO effect = +331%).
- AfCFTA effect currently transitional: short implementation window, not structural underperformance.

Africa's unresolved WTO Priorities — MC14 and beyond

Domestic support
88.8% of Final Bound AMS held by developed countries. 104 developing Members hold zero entitlements.

Public stockholding (PSH)
No permanent solution delivered after MC9–MC14. Essential tool for food security.

Special safeguard mechanism
Cushion against import surges and price volatility. Linkage to market access remains main obstacle.

Cotton
Trade-related elements undelivered since 2005 Hong Kong Declaration. Disproportionately harms African LDCs.

⚑ Food Insecurity: Food insecurity in Africa rose from 46.2% (2014–16) to 57.9% (2022–24) — nearly double the global rate of increase. 23 of the 30 most food-insecure countries worldwide and 7 of the 10 most food import-vulnerable countries are in Africa.

- African Group position: rebalance domestic support before advancing market access negotiations.
- Advance meaningful negotiations on PSH, SSM, and cotton ahead of MC15.

POLICY PRIORITIES

Productivity and supply
Scale access to inputs, irrigation, climate-resilient technologies, and extension services to cut import dependency.

Export diversification
Promote agro-processing, value addition, and integration into regional value chains, especially processed agrifood.

Trade facilitation
Prioritize digital SPS certification, laboratory infrastructure, and single-window systems under AfCFTA and RECs.

WTO Reform
Rebalance AMS entitlements before requiring market access concessions from developing countries.

Read the full book: https://hdl.handle.net/10568/183392

INTERNATIONAL FOOD POLICY RESEARCH INSTITUTE
A sustainable world free of poverty, hunger, and malnutrition
IFPRI is a CGIAR Research Center
1201 Eye Street, NW, Washington, DC 20005 USA | T. +1-202-862-5600 | F. +1-202-862-5606 | Email: ifpri@cgiar.org | www.ifpri.org | www.ifpri.info

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