

Agricultural Trade in Africa: Current trends and challenges

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Introduction

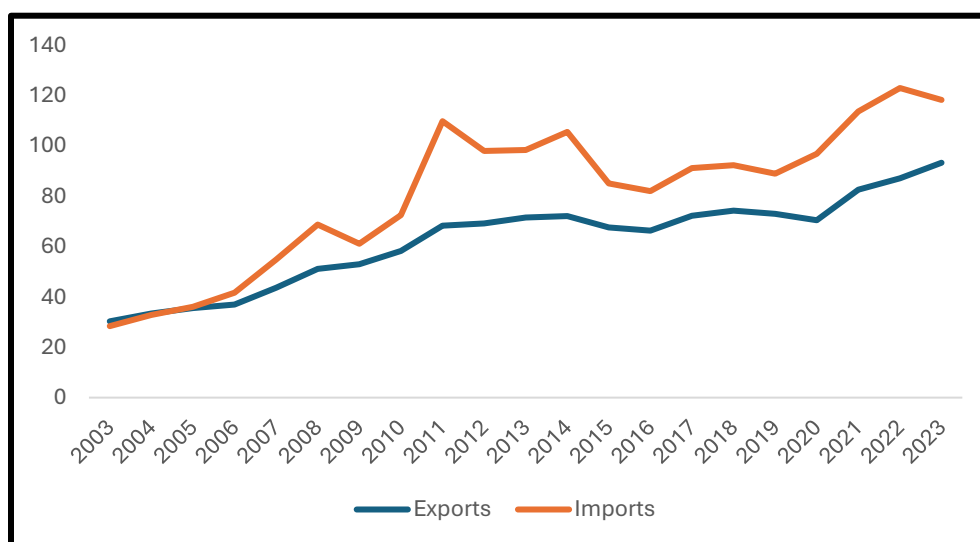
Agricultural trade can play a central role in meeting people's food needs, both by increasing available supply and by boosting stakeholders' incomes, given that 60% of the labor force works in this sector (Bonuedi et al., 2020; Wonyra and Gnedeka 2023). However, an analysis of African agricultural trade performance over the past twenty years highlights some key issues to watch. First, African agricultural trade is the lowest in the world, not helped by high costs of trading and non-tariff measures. Second, a trade deficit that has been steadily widening since 2006 as Africa has become heavily dependent on imports of basic agricultural products such as cereals. The continent currently meets more than 40% of its cereal demand on world markets. This deficit in African agricultural trade is fueled by low productivity, linked to declining yields and a lack of sufficient investment in production, storage, processing, and marketing infrastructure, and rapid population growth and urbanization in Africa which has increased demand for imported food. Third, over the past two decades, the structure of African agricultural exports has remained largely undiversified, with unprocessed cash crops continuing to be the dominant export commodity. To better understand the dynamics of agricultural trade in Africa, this brief analyzes its performance, over the 2003-2023 period, by highlighting the most dynamic countries and regional economic communities, the most exported and imported products, and the continent's revealed comparative advantages.

Overview of Africa's agricultural trade

General trade performance

The analysis of agricultural trade trends in Africa over the past two decades shows that after the 2003-2005 sub-period, when exports covered imports, the continent's trade deficit has been steadily increasing since 2006. (See figure 1). Indeed, when African agricultural exports increased from approximately 30 billion USD in 2003 to 93.3 billion USD in 2023, imports increased from 30 billion USD to 118 billion in 2023.

Figure 1: Overall agriculture exports and imports in Africa (USD billion)



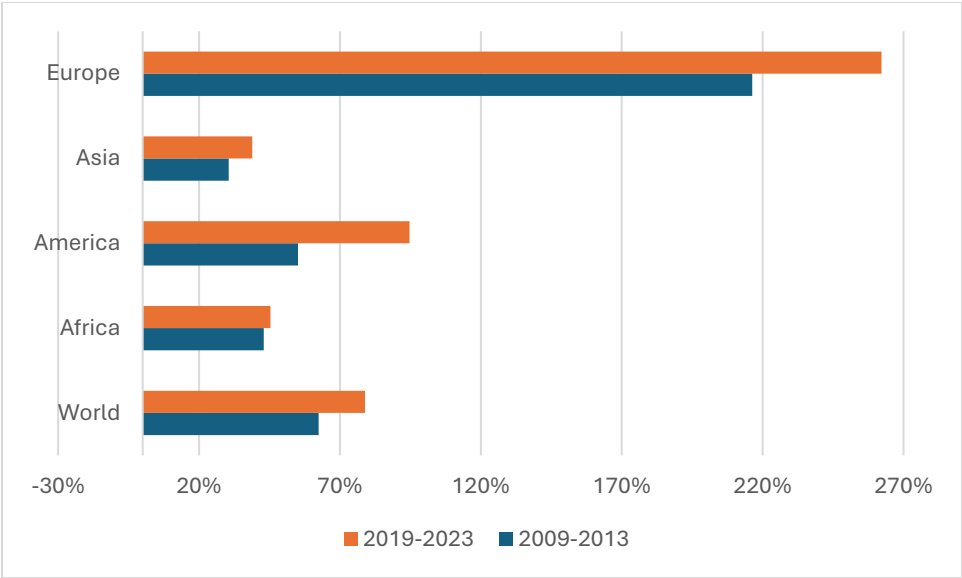
Authors' own elaboration using AATM 2025 database.

This trade deficit is explained by the significant dependence on the global food market which, with the price volatility resulting from the various economic crises, leads to the sharp fluctuations in imports observed during this period. For example, the increase of imports between 2006 and 2008 can be attributed to the global rise in food prices that occurred after the depreciation of the US dollar, which affected the cost of imports and the production of basic foodstuffs (FAO, 2009). In 2009, the value of agricultural imports declined due to the relative decline in grain prices. However, global food prices remained volatile, and similar shocks occurred in 2010-2011, pushing up the value of imports. In addition, the decline in 2015 and 2016 can be attributed to the general reduction in global trade following sanctions imposed by the EU and the United States on Russia (Odjo et al., 2024). More recently, in 2022, African agricultural imports reached an unprecedented value of USD 122.9 billion due to sharp price increases linked disruptions in wheat supply chains following Russia's invasion of Ukraine. Measured in volume, imports increased by 100% between 2003 and 2023. This increase is concentrated during the sub-period 2003-2013 where imports are 10 times greater than exports. These trends show that Africa's net trade in agricultural products remains vulnerable to international shocks.

A second key point is that agricultural trade in Africa is very low compared to other regions of the world and increasing more slowly. Indeed, the trade-to-production ratio shown in Figure 2 below reveals that Africa has the second lowest ratio. Furthermore, the level of this ratio

indicates that the continent is only partially integrated into global agricultural value chains, and although its production level covers some of its needs, it remains dependent on trade for full coverage.

Figure 2: Average change of trade to production ratio in %

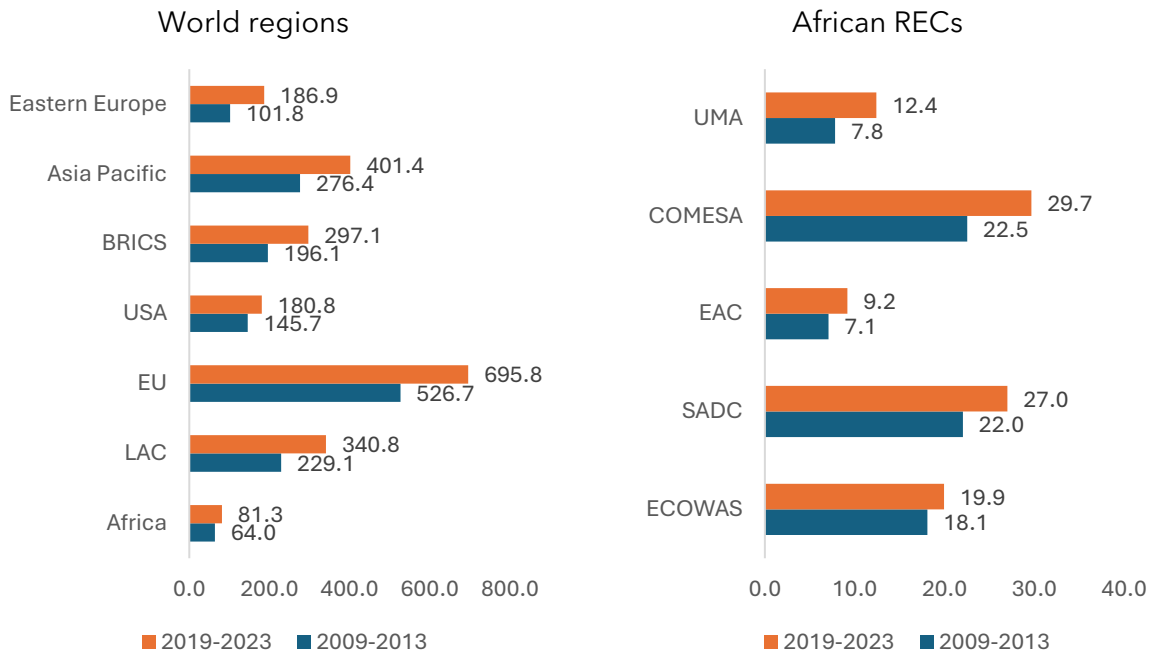


Source: Authors' own elaboration using FAOSTAT 2025 database.

Regarding exports, for example, from 2009 to 2013, agricultural exports increased by an average of 27%, compared to 48% for Latin America and the Caribbean (See figure 3). During 2019-2023, agricultural exports from the Asia-Pacific region were, on average, five times higher than those from Africa. A similar trend is observed for imports as we can see in figure 4.

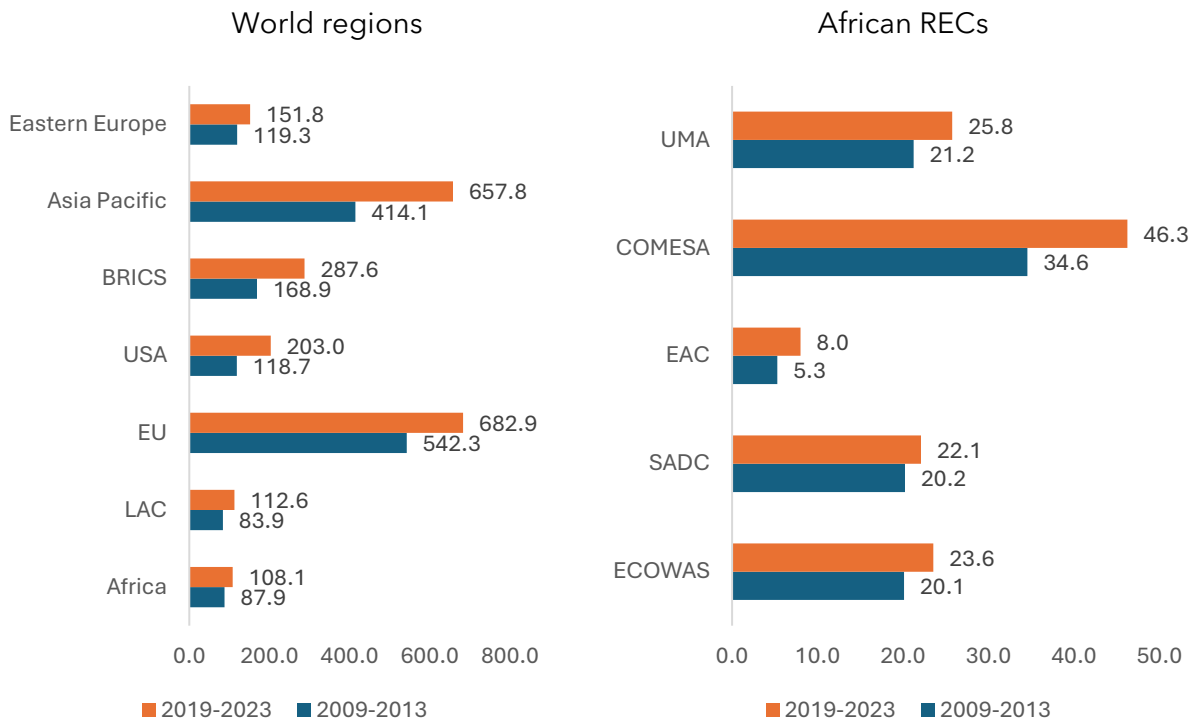
At the regional level (Figure 3b and 4b), three regional economic communities (RECs) polarize trade both on the export and import side. These are respectively the Common Market for Eastern and Southern Africa (COMESA), followed by the Southern African Development Community (SADC) and the Economic Community of West African States (ECOWAS). This trend can be explained by the fact that these RECs have made the most progress in the process of trade liberalization.

Figure 3: Average level of exports by region (USD billion)



Source: Authors' own elaboration using FAOSTAT 2025 database.

Figure 4: Average level of imports by region (USD billion)

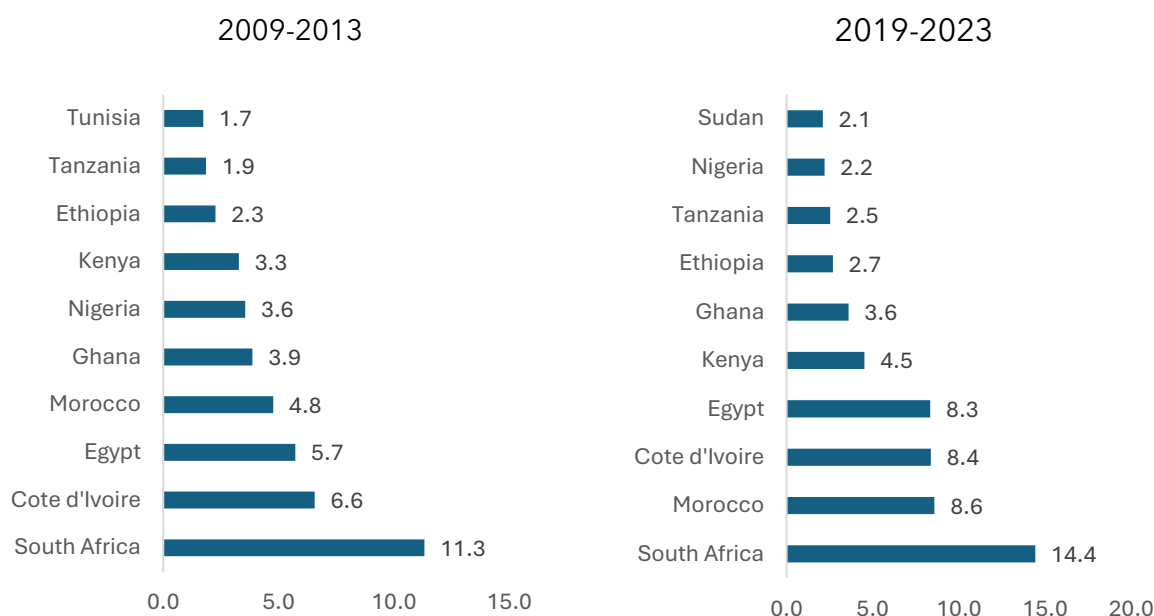


Source: Authors' own elaboration using AATM 2025 database.

Leading African exporters in world markets?

The composition of the top exporters changed only slightly over the two periods as we can see in figure 4 and 5. Indeed, South Africa and some North African countries are the continent's top exporters of fruits and vegetables, West Africa dominates cocoa exports, and East Africa dominates tea and coffee exports. South Africa is Africa's leading agricultural exporter for both periods, with exports equivalent to more than 25% of the total exports of the top ten countries. Among these exporters, South Africa, Egypt, and Morocco participate in fruit and vegetable value chains. Morocco is also among the top African exporters of tomatoes.

Figure 5: Top ten African exporters of agricultural products (USD billion)



Source: Authors' own elaboration using AATM 2025 database.

As for Côte d'Ivoire and Ghana, agricultural exports are concentrated in cocoa beans, cocoa butter, and cocoa powder. On the other hand, Kenya is among the top exporters of tea, which accounts for more than 10% of the country's total exports (including non-agricultural exports)¹.

As concerns importers, Egypt, the largest wheat importer of the continent, remains Africa's top importer of agricultural goods for both periods, with imports increase by 30% between the two periods. Cereals, including wheat, corn, barley, and rice, are among the top agricultural imports for all the countries depicted in the figure. Additionally, oils and sugar are also important particularly for East African countries such as Ethiopia and Kenya. Furthermore, these trends also show that the continent's 4 largest exporters and importers

¹ Data is obtained from Kenya's country profile of the Atlas of Economic Complexity (<https://atlas.hks.harvard.edu/countries/404/export-basket>)

are countries that are in the top 10 highest GDPs.

The performance of Africa's top exporters and importers reveals potential for improving Africa's position in global agricultural trade. In this regard, Africa's position in international agricultural trade could improve if African countries specialized in products for which they possess a revealed comparative advantage (RCA).

Comparative advantages and specialization patterns

To determine whether African countries have a revealed comparative advantage, we mobilized the RCA index method. The RCA index is equal to the proportion of a country's exports of a given product divided by the proportion of world exports of that same product, helps highlight possible options. In this regard, an RCA index greater than 1 indicates a revealed comparative advantage in the corresponding product. However, it should be noted that the index scores must be interpreted with caution because they compare the relative importance of a product in a country's exports to that in the exports of the rest of the world. Therefore, less diversified or smaller economies may have particularly high RCA scores, compared to other exporters. In the table below, we determine the comparative advantages revealed for agricultural products for the sub-period 2019-2023 and identify the best-placed African countries.

Table 1: Highest Revealed Comparative Advantage for African countries at global level (2019-2023)

	Top 1	Top 2	Top 3
Animals; live	Somalia 49.4	Botswana 42.2	Qatar 26.3
Trees and other plants, live	Kenya 17.0	Colombia 14.1	Ethiopia 8.5
Fruit and nuts, edible	Guinea-Bissau 11.2	Iraq 8.3	Costa Rica 6.7
Coffee, tea, mate and spices	Burundi 27.7	Comoros 27.6	Madagascar 21.1
Products of the milling industry	Uzbekistan 11.6	Lesotho 11.5	Kazakhstan 9.6
Oil seeds and oleaginous fruits	Niger 12.5	South Sudan 11.1	Chad 10.9
Lac; gums, resins	Chad 37.1	Turkmenistan 31.4	Afghanistan 24.1
Animal or vegetable fats and oils	Gabon 12.5	Malaysia 9.1	Indonesia 8.4

Meat, fish or crustaceans	Cabo Verde	Seychelles	Mauritius
	23.6	16.1	11.9
Sugar and sugar confectionery	Eswatini	Algeria	Belize
	24.9	14.6	11.1
Cocoa and cocoa preparations	Cameroon	Côte d'Ivoire	Ghana
	26.1	25.2	23.0
Food industries	Bolivia	Angola	Argentina
	6.4	4.8	4.6
Tobacco and manuf.	Zimbabwe	Malawi	Cuba
	29.3	22.6	18.2
Essential oils and resinoids	Haiti	New Caledonia	Comoros
	122.2	114.3	61.9
Raw hides and skins	Libya	Turkmenistan	Iraq
	31.5	28.6	25.0
Wool, fine or coarse animal hair	Mongolia	Lesotho	Australia
	310.3	223.8	20.9
Vegetable textile fibers	Eritrea	France	Belarus
	69.0	14.4	10.7

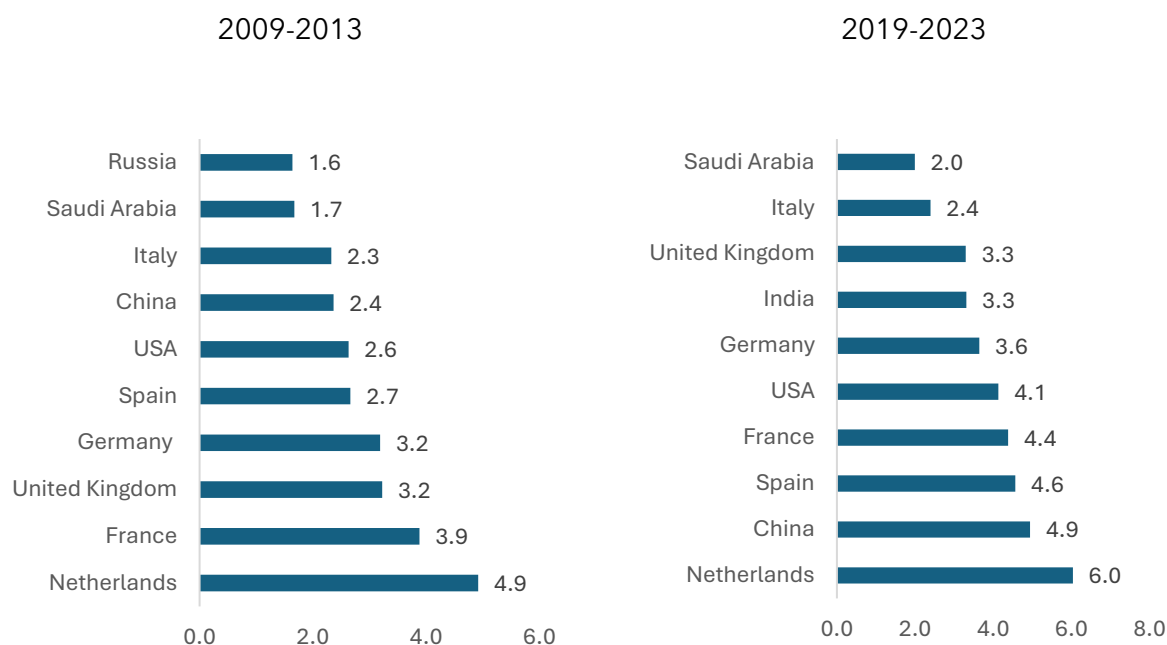
Source: Authors' own elaboration using AATM 2025.

The results of the RCA index show that 29 African countries (in green in the table 1) are among the top three, at world level, in terms of highest comparative advantage for trade in 17 agricultural products. Developing an aggressive trade policy around these products could enable them to become global leaders and improve Africa's position in global trade. Given that several countries on the continent could improve their performance in the global market for agricultural products by specializing in products for which they have a revealed comparative advantage, analyzing the structure of Africa's main partners to see to what extent it could support this ambition.

Leading markets and trade partners

The main destinations for African exports have changed slightly over time. The Netherlands has been Africa's top export destination market certainly because is home to one of the world's largest cocoa-grinding industries (CBI 2021).

Figure 6: Top ten destinations of agricultural products for African exporters (USD billion)

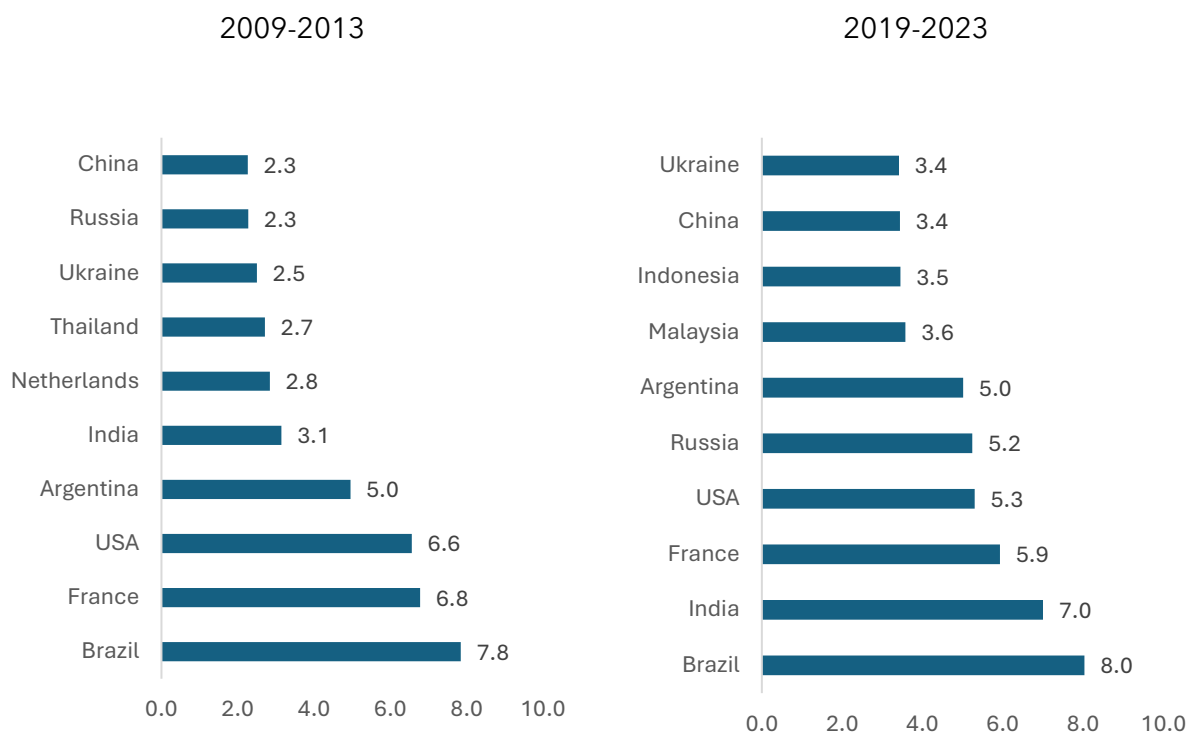


Source: Authors' own elaboration using AATM 2025 database.

However, there is a growing importance of trade with Asian countries (Figure 6) such as China which moved up from the 7th to the 2nd top export market for African agricultural goods. In addition, India and Gulf countries are also playing an increasingly significant role in Africa's agribusiness sector.

At import level, Africa's agricultural markets are more geographically diverse (See figure 7). Brazil was the top partner during both time periods and India rose from fifth to second partner during the second period. Agricultural imports from both countries include sugarcane, corn, beef, poultry, and rice. In addition, imports from USA, Russia, Ukraine, and France, are also important and primarily consist of wheat and, to a lesser extent, maize, and other cereals. Meanwhile, imports from Southeast Asian countries, are dominated by palm oil.

Figure 7: Top ten origins of agricultural products for African importers (USD billion)



Source: Authors' own elaboration using AATM 2025 database.

The weakness of African trade is also due to the tariff and non-tariff policies applied to African countries by their African and foreign partners.

Recent changes in trade policy

Tariffs policies

Several studies have shown that restrictive trade policies hamper African agricultural trade. On the one hand, African exporters face high and increasing tariffs on their exports (Goundan et al., 2022; Goundan and Tadesse, 2021). On the other hand, tariffs imposed on trade in key commodities between different regional economic communities (RECs) are significantly higher than tariffs within RECs.

Table 2: Average tariffs applied by RECs on agricultural product imports

Exporter REC²	COMESA	ECCAS	ECOWAS	SADC	AMU	ROW
COMESA	0.06	0.23	0.17	0.06	0.16	0.12
ECCAS	0.19	0.23	0.17	0.11	0.19	0.12
ECOWAS	0.24	0.23	0.00	0.15	0.19	0.12
SADC	0.09	0.23	0.17	0.02	0.19	0.12
AMU	0.14	0.23	0.17	0.13	0.08	0.14
ROW	0.23	0.23	0.17	0.15	0.17	0.13

Source: Authors' calculations using the MAcMap-HS6 2019.

As we can see in table 2 behind and confirmed by data from Global Trade Alert, the liberalization of intra African trade is mainly done by the South African countries regrouped in COMESA and SADC. Indeed, over the past two years 60% of liberalization policies between African countries were made in these areas. Most of these measures were imposed by the Southern African Customs Union, and more than 60% of them tend to favor trade liberalization.

² Note: Exporters are in rows, and importers are in columns. AMU = Arab Maghreb Union; COMESA = Common Market for Eastern and Southern Africa; ECCAS = Economic Community of Central African States; ECOWAS = Economic Community of West African States; REC = regional economic community; ROW = rest of the world; SADC = Southern African Development Community.

Table 3: Tariff Measures implemented and enforced by African countries in 2023 and 2024

Implementing entity	Measure
Botswana, Eswatini, Lesotho, Namibia, South Africa	SACU: Reduction of the import duty on canned minced anchovies
Botswana, Eswatini, Lesotho, Namibia, South Africa	SACU: Increase in the customs duty on sugar (March 2024)
Botswana, Eswatini, Lesotho, Namibia, South Africa	SACU: Reduction of the import duty on certain anchovies for AfCFTA countries
Botswana, Eswatini, Lesotho, Namibia, South Africa	SACU: Import tariff rebate for onion powder
Burundi, Congo, Kenya, Rwanda, Somalia, South Sudan, Tanzania, Uganda	East African Community: Import duty increase on microbial fats and oils
Liberia	Liberia: Suspension of import duties on rice
Liberia	Liberia: Government suspends import duties on agri-food products
Republic of the Sudan	Sudan: Import duties increase on 130 products
Uganda	Uganda: Government introduces a 25% import duty on the importation of refined sugar
Zimbabwe	Zimbabwe: Exemption of internal taxation and import duties on basic goods
Zimbabwe	Zimbabwe: Exemption on import tariffs for food products

Source: Authors' own elaboration using the Global Trade Alert database.

Non-tariff measures

In recent decades, the use of non-tariff measures (NTMs) such as sanitary and phytosanitary (SPS), technical barriers to trade (TBT), quotas, and import licenses have increased significantly. Their implementation often involves high compliance costs that impact trade costs and reduce export profits (Liu et al., 2019). The USA imposes the highest number of measures, followed by China, India, Brazil, and Argentina. Two of these countries, China and India, are among Africa's top ten export destinations. Thus, the implementation of restrictive or discriminatory measures is likely to undermine Africa's exports to these markets. Brazil and other South American countries also impose many measures to protect their domestic agricultural sectors.

On the export side, non-tariff measures (NTMs) hinder access to global markets. The most restrictive NTMs come from European partners. Moreover, these measures are imposed on the most competitive exports, such as cocoa and cocoa preparations, fruits and nuts, vegetables, coffee, and tea. African countries also impose high NTMs on their agricultural imports. An

illustration of these different trade barriers is provided in Table 4a and 4b below.

Table 4a: Non-tariff Measures implemented and enforced by African countries in 2023 and 2024

Non-automatic licensing, quotas	
Botswana: Ban on the export and import of corn and sorghum	Import ban
Kenya: Government bans powdered milk imports	Import ban
Kenya: Halt of import permits for powdered milk from Brookside Uganda	Import licensing requirement
Kenya: Government imposes import restrictions on wheat and maize and announces new public purchase program	Import licensing requirement
Mali: Suspension of imports of wheat flour and pasta	Import ban
Togo: Government restricts imports of frozen poultry	Import licensing requirement
Price-control measures, including additional taxes and charges	
Kenya: Excise duties imposed on several imports	Internal taxation of imports
Finance measures	
Ethiopia: Central bank bans consignment payment for beef exports	Trade payment measure
Subsidies (excl. export subsidies)	
Botswana: BAMB announces the 2022/23 production contract prices	Price stabilization
Egypt: The General Authority for Supply Commodities (GASC) offers corn for purchase to local poultry producers on the stock exchange	Price stabilization
Ghana: Government increases cocoa producer prices for the 2024/25 crop season	Price stabilization
Kenya: Government imposes import restrictions on wheat and maize and announces new public purchase program	Price stabilization
Nigeria: Afreximbank approves USD 200 million facility for BUA Industries Limited	State aid, unspecified
South Africa: Setsong Tea Crafters (Pty) Ltd secures ZAR 3.75 billion in state aid from IDC	State aid, unspecified
Export-related measures (incl. subsidies)	
Benin: Exports of soybeans prohibited from 1 April 2024	Export ban
Botswana: Ban on the export and import of corn and sorghum	Export ban
Cameroon: Cocoa Export Ban to Nigeria	Export ban
Egypt: Imposition of a temporary export ban on sugar	Export ban
Egypt: Government expands export ban on raw hides	Export ban
Ghana: Export ban on grains, including maize, rice and soya beans	Export ban

Source: Authors' own elaboration using the Global Trade Alert database and Food and Fertilizer Export Restrictions Tracker.

Table 4b: Non-tariff Measures implemented and enforced by African countries in 2023 and 2024

Kenya: Revenue Authority published guidelines to benefit from VAT tax exemption on exported coffee and tea	Tax-based export incentive
Malawi: Export ban on maize	Export ban
Mali: Export ban on shea nuts, ground nuts, soybeans, sesame	Export ban
Morocco: Introduction of export licensing requirements for various goods and tax for fresh or processed fruit tree products	Export licensing requirement and export tax
Nigeria: Export ban on maize	Export ban
Tanzania (Zanzibar): Food export ban to avoid food shortages	Export ban
Tanzania: Government suspends permits for Uganda's exporters of rice and maize	Export ban
Zambia: Export ban on maize	Export ban

Source: Authors' own elaboration using the Global Trade Alert database and Food and Fertilizer Export Restrictions Tracker.

Conclusion

Developing agricultural trade in Africa is essential given its current low level and the challenges of combating food insecurity and poverty. Indeed, an analysis of trade trends reveals a structural deficit, characterized by a persistent reliance on imports of commodities subject to high price volatility on international markets, such as cereals, oils, and sugar. This situation is, to some extent, linked to trade policies implemented to date, particularly the significant trade barriers. In terms of trade performance, the main importing countries are Egypt, Algeria, Nigeria, South Africa, and Morocco, which primarily import cereals. On the export side, South Africa, Morocco, Côte d'Ivoire, and Egypt dominate, with a strong focus on fruits and nuts.

Finally, over the past two decades, emerging economies such as China, Saudi Arabia, Brazil, and India have become important trading partners for the African continent, favoring products in which Africa has demonstrated comparative advantages. This situation offers prospects for improving the performance of African agricultural trade relative to other regions of the world.

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