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Accelerating Africa's Trade Liberalization Agenda Can Stabilize Domestic Markets and Mitigate Rising Food Insecurity

Diversification of suppliers and prioritization of regional supply chains can reduce import dependency and strengthen resilience to shocks – latest Africa Agriculture Trade Monitor

DAKAR, December 16, 2025 – Coordinated agrifood trade reforms and targeted investments are needed to fully benefit from an African single market and improve food security, a new report finds. The Africa Agriculture Trade Monitor (AATM) 2025 assesses the extent to which the continent has progressed toward building an integrated food market five years into negotiations to create the African Continental Free Trade Area (AfCFTA), with an analysis of existing regional frameworks and their role in deeper trade integration.

Produced by [AKADEMIYA2063](#) and the [International Food Policy Research Institute \(IFPRI\)](#), the annual flagship AATM is dedicated exclusively to African agricultural trade and policies and serves as an important resource on the continent's role in global and regional markets and across key value chains, providing comprehensive, data-based analysis on the evolving landscape of intra-African and extra-African trade flows.

The [8th edition of the AATM](#) examines the trade-food security nexus, with analysis of recent trends and drivers of Africa's global and intra-African trade, in particular trade within Africa's economic groupings. It also includes an analysis of rice trade patterns and competitiveness, and the role of fertilizer trade in achieving food security. The report was launched during a hybrid event in Dakar attended by policymakers, research and regional institutions, and development partners.

Intra-African agricultural trade tripled between 2003 and 2023, rising from approximately US\$6 billion to nearly US\$20 billion, according to the new report. Analysis of intraregional African trade demonstrates the interdependencies between regions and countries, which served as more reliable trading partners amid global supply chain disruptions, such as the COVID-19 pandemic and the Russia-Ukraine conflict. The report also notes that unrecorded informal trade accounts for a significant share of regional food flows, suggesting that intra-African trade is likely far larger and more dynamic than that captured by current data.

Yet, the continent remains heavily dependent on food imports from the rest of the world. Africa's agricultural import bill reached a record US\$122.9 billion in 2022, primarily driven by cereals (with Northern Africa as lead importer), which now account for more than US\$31 billion of total food imports, with animal and vegetable fats and oils, sugars, and sugar confectionery also among the top imported food items. Africa still applies the world's highest agrifood tariffs, and African exporters also face some of the most restrictive non-tariff measures in key markets, including the United States, China, India, and Brazil, further constraining trade gains.

Progress toward ending hunger and malnutrition has stalled, compounded by climate shocks such as the 2023–2024 El Niño event, global conflicts, including the ongoing Russia-Ukraine war, and the aftereffects of the COVID-19 pandemic. Amid this complex context, increasing intra-African trade can be a coping strategy for global crises and supply chain disruptions.

“Africa's food security challenges are increasingly intertwined with the structure of its trade, as demonstrated in this year's AATM,” said **Dr. Ousmane Badiane**, Executive Chairperson at AKADEMIYA2063. “Growing import dependence, concentrated suppliers, and exposure to global shocks mean that the continent must strengthen both domestic production and regional markets. At the same time, the report shows remarkable opportunities: intra-African trade has tripled in the past 20 years, new regional value chains are emerging, and strategic commodities like rice and fertilizers hold untapped potential for resilience.”

The AATM 2025 includes detailed case studies of two value chains central to agrifood productivity, resilience, and long-term food security in Africa: rice and fertilizer.

The report highlights rice as one of Africa's key staples, with demand expected to grow significantly over the coming decades due to the combined effects of population growth, rising incomes, and urbanization. With yields averaging just 2.1 tons/ha—less than half the global average of 4.8 tons—Africa now imports an average of 15 million tons of rice each year, supplying 40 per cent of continental consumption. With demand projected to outpace supply, imports are forecasted to grow 56 percent by 2033, making Africa the world's largest rice-importing region within 10 years, accounting for 40 percent of total global imports.

Fertilizer is critical to food security, given its crucial role in enhancing agricultural productivity and contributing to food availability. However, Africa's agricultural systems continue to use low levels of fertilizer, with application rates averaging 22–23 kg/ha, far below the global average of 139 kg/ha and the [Abuja Declaration](#) target of 50 kg/ha. While fertilizer production in Africa has grown significantly, the continent remains a net exporter, with US\$14.7 billion in exports and US\$8.8 billion in imports in 2023.

The report also explores the interplay between regionalism, continentalism, and multilateralism. Findings indicate that most African Regional Economic Communities (RECs) support the development of continental trade, especially in agriculture. Nevertheless, with respect to trade performance, progress is uneven across Africa's RECs. While intra-African agricultural trade grew from US\$14.8

billion to US\$16.6 billion over the past decade, progress is uneven at the regional level — COMESA (+20.9 per cent), SADC (+9.2 per cent), and the TFTA (+22.2 per cent) recorded solid gains, while ECOWAS (−19.3 per cent) and CEMAC (−38.7 per cent) saw significant declines.

“Despite progress, intra-African trade is still constrained by a number of barriers,” said **Dr. Johan Swinnen**, Director General of IFPRI. “The 2025 AATM speaks to the need to address fragmented regional markets, high trade costs, and poor coordination, and calls on policymakers to invest in measures to increase productivity and modernize and streamline trade regimes.”

Key 2025 AATM policy recommendations include:

- **Strengthen regional markets and lower trade barriers to reduce food insecurity.** Countries should deepen implementation of the AfCFTA by reducing tariff and non-tariff barriers, harmonizing standards, and investing in cross-border infrastructure. Stronger and better-integrated regional markets would allow countries to make better-informed trade decisions and rely more on African supply and less on volatile global imports.
- **Improve regional food systems resilience through investments in productivity, logistics, and supply chains.** Africa’s dependence on imports remains high. Expanding regional food production, upgrading transport and storage systems, and lowering intra-African trade costs are vital to building resilient, efficient supply chains capable of meeting rising demand.
- **Boost productivity in key staples, including rice.** Countries must raise productivity through better water-use efficiency, irrigation, and adoption of drought-resistant varieties. Strengthening aggregation, processing, and milling capacity will also improve competitiveness and reduce import reliance.
- **Expand and coordinate fertilizer trade within Africa.** Africa should leverage its position as a net fertilizer exporter by enhancing intra-African fertilizer flows and improving distribution systems. Increasing use from current low levels could close yield gaps and strengthen resilience to global agro-input disruptions.
- **Address restrictive non-tariff measures to unlock Africa’s export potential.** African exporters face some of the world’s most restrictive non-tariff measures. Reducing compliance burdens and strengthening regulatory capacity, while building trade-related capacities, would expand market access and help countries diversify away from highly concentrated import sources, better positioning Africa in the global economy.

Harmonizing policies to promote productivity gains and market development, along with stepped-up infrastructure investments and regulatory reforms, will be crucial to boosting regional trade, enabling countries to realize the full potential of the [Kampala CAADP Declaration](#) and the AfCFTA, thereby enhancing food security by increasing availability and stabilizing domestic food markets.

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About AKADEMIYA2063

AKADEMIYA2063 is a pan-African non-profit research organization with headquarters in Kigali, Rwanda, and a regional office in Dakar, Senegal. Inspired by the ambitions of the African Union's Agenda 2063 and grounded in the recognition of the central importance of strong knowledge and evidence-based systems, the vision of AKADEMIYA2063 is an Africa with the expertise we need for the Africa we want. This expertise must be responsive to the continent's needs for data and analysis to ensure high-quality policy design and execution. AKADEMIYA2063's overall mission is to create, across Africa, state-of-the-art technical capacities to support the efforts by the Member States of the African Union to achieve the key goals of Agenda 2063 of transforming national economies to boost economic growth and prosperity. For more information, visit: www.akademiya2063.org.

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The International Food Policy Research Institute (IFPRI), a CGIAR Research Center established in 1975, provides research-based policy solutions to sustainably reduce poverty and end hunger and malnutrition. IFPRI's strategic research aims to foster a climate-resilient and sustainable food supply; 4 promote healthy diets and nutrition for all; build inclusive and efficient markets, trade systems, and food industries; transform agricultural and rural economies; and strengthen institutions and governance. The Institute's regional and country programs play a critical role in responding to demand for food policy research and in delivering holistic support for country-led development. For more information, visit the global website at www.ifpri.org and the regional website at <https://www.ifpri.org/division/africa-region-afr>.