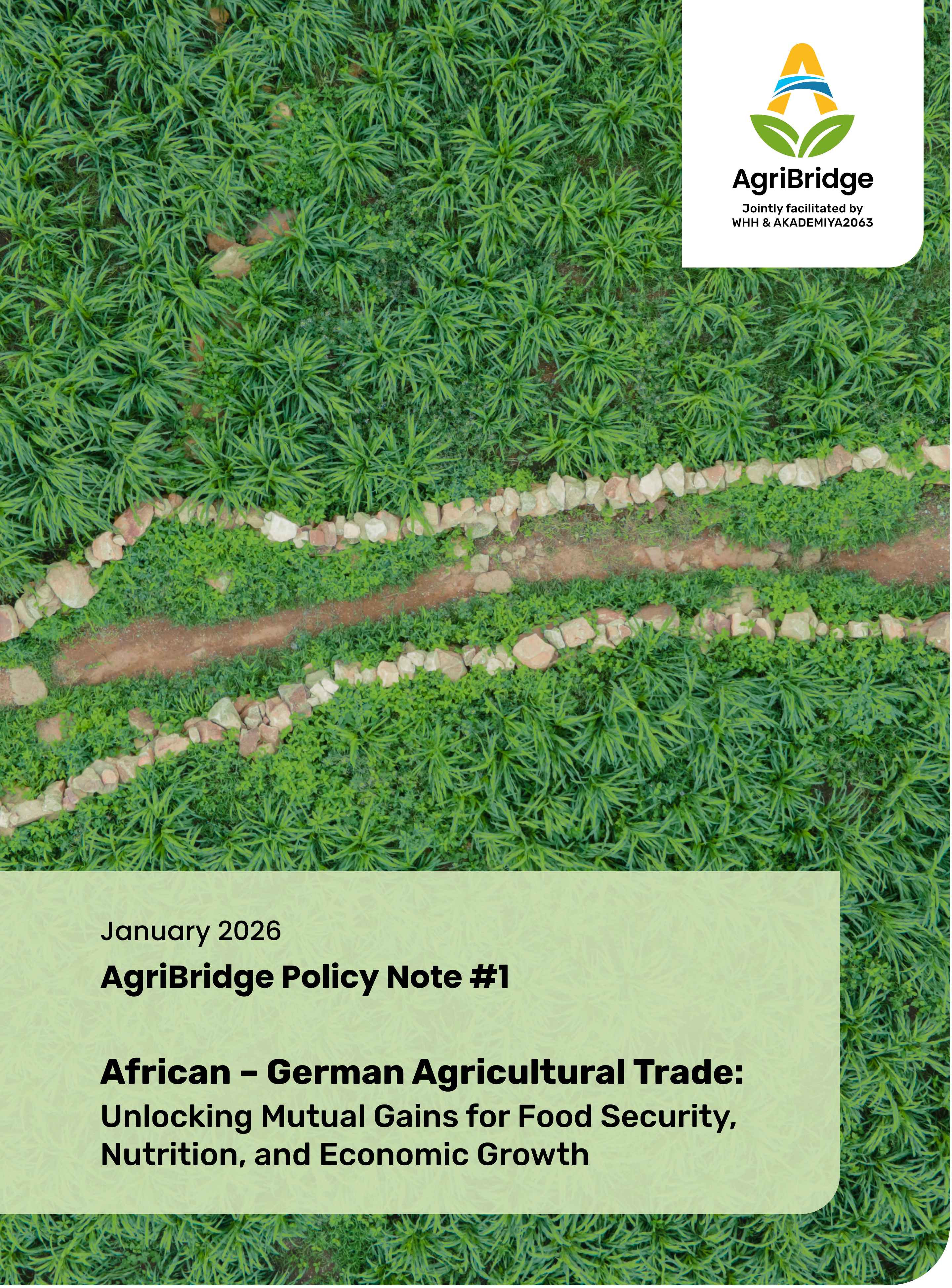

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AgriBridge Policy Note #1

African – German Agricultural Trade:
Unlocking Mutual Gains for Food Security, Nutrition, and Economic Growth

Jointly facilitated by

WELT HUNGER HILFE

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The executive summary is based on the original version, which contains a detailed analysis and specific case studies. The executive summary and the full version of this policy note are available for download at the following link:

Executive Summary

Africa's agricultural trade offers significant opportunities for economic growth and agrifood system transformation. Yet, structural challenges such as limited intra-African trade, dependence on imported staples, weak infrastructure, and strict compliance requirements constrain its potential. Trade with Germany presents a mutually beneficial opportunity, but without careful alignment, it could deepen dependencies. Research shows that investments in value chain development, trade facilitation, and regional integration improve food security, increase incomes derived from exports, and strengthen local economies, as highlighted in case studies from Kenya, Uganda, Zambia, and West Africa. Policy actions, including removing trade barriers, supporting agro-processing, aligning German trade objectives with local development strategies, and enhancing regional integration, can create win-win outcomes, build resilient agrifood systems, and strengthen Africa–Germany partnerships.

Africa's agricultural trade offers significant opportunities for economic growth and agrifood system transformation.

Agricultural trade is central to Africa's agrifood systems and economic development, yet persistent structural challenges limit its full potential. Africa continues to mainly export raw commodities such as cocoa, coffee, and cotton, while remaining heavily dependent on imports for staple foods, processed products, and agricultural inputs. While trade has the potential to improve the availability of (healthy) food and stabilize consumption, these benefits remain constrained by limited infrastructure, fragmented markets, high tariffs, and persistent non-tariff barriers (NTBs). Intra-African trade is still low, making the continent more vulnerable to global price changes and supply disruptions. At the same time, trade between Africa and Germany remains limited, despite opportunities in Africa's growing food markets and Germany's interest in sustainable and reliable value chains. Strengthening trade in a balanced way can support Africa's goals under the Comprehensive African Agriculture Development Programme (CAADP) Kampala Declaration to increase food production, reduce food losses, generate income, and expand regional trade, while also advancing Germany's aim to promote sustainable economic partnerships. This requires policy attention so that agricultural trade can contribute to the realization of the Right to Food, support local value addition, and create shared benefits for both Africa and Germany.

Stronger Together: Trade as a Catalyst for Resilient African Agrifood Systems

The analysis in this policy note draws on regional trade data, case studies, and policy analysis to examine how agricultural trade can support the right to healthy and nutritious food in Africa through global partnerships, such as with Germany. The note examines trends in intra-African agricultural trade and Africa's trade with Europe, thereby focusing on how trade patterns, standards, infrastructure, and value addition affect food security and agricultural growth.

The findings show that Africa continues to export mainly raw products such as cocoa, coffee, tea, cotton, fruits, and nuts, while importing large amounts of basic food items like cereals, sugar, and cooking oils. This imbalance increases Africa's vulnerability to global price shocks and limits earnings from trade. Intra-African trade has grown, but it still accounts for less than one-fifth of the continent's total trade, partly due to weak transport systems, onerous and often opaque border rules, and limited processing capacities. Currently, Africa's imports from Germany concentrate on higher-value processed agricultural goods and machinery, which may reinforce existing dependency unless investments to grow local processing capacities are incentivised.

This policy note concludes that expanding regional trade through the African Continental Free Trade Area (AfCFTA) is critical for strengthening Africa's food security and economic resilience and for bolstering its role as a key trading partner for Europe, including Germany. By eliminating tariffs and reducing NTBs, harmonising standards, and increasing investments in agro-processing as well as in infrastructure and digital trade, AfCFTA can accelerate the development of regional value chains and ensure that SMEs, women, youth, and smallholders benefit more equitably from integration efforts. Public–private partnerships (PPPs) can further unlock investment in sustainable infrastructure and processing, while targeted support can enhance the capacity of Regional Economic Communities (RECs) and the AfCFTA Secretariat to coordinate and monitor implementation effectively.

Germany can play a strategic role by supporting local value addition to promote agro-industry, skills development, and fair market access. Aligning German cooperation and investment with African priorities —such as sustainable agro-industrialisation, renewable energy, and climate-smart technologies— would open space for blended-finance solutions that use development finance—including Official Development Assistance (ODA) and PPPs— to mobilise additional commercial capital in line with shared interests, human rights, and environmental responsibility.

> Germany can play a strategic role by supporting local value addition to promote agro-industry, skills development, and fair market access.

Agricultural trade between Africa and Germany presents a significant opportunity to strengthen sustainable agrifood systems, create employment opportunities, and promote economic growth.

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Key policy recommendations

1. Strengthen Africa–Germany partnership-based investments

- Expand Africa–Germany cooperation and blended financing opportunities that prioritise local value addition, climate-smart innovation, technology transfer, sustainable infrastructure, and economic diversification. All trade and investment partnerships should adhere to binding environmental and social safeguards.
- Adopt a multi-stakeholder partnership model by engaging civil society, research organisations, the private sector, and African regional institutions in designing and monitoring economic cooperation.

2. Accelerate AfCFTA implementation and regional integration

- Fast-track the implementation of the AfCFTA by advancing intra-African tariff elimination and prioritizing balanced trade agreements with Germany and the EU that offer environmental, social, and economic mutual benefits. Prioritise the removal of NTBs, the harmonisation of standards and rules of origin, the expansion of digital trade systems, and strategic investments in trade-enabling infrastructure to increase the efficiency and competitiveness of cross-border trade.
- Strengthen the institutional capacity of RECs and the AfCFTA Secretariat to effectively coordinate, monitor, and support the implementation of trade reforms and deeper regional integration.

3. Support smallholders, women, youth, and SMEs

- Promote inclusive trade and growth by expanding access to affordable finance, tailored skills development, and digital tools for smallholders, women, youth, and SMEs across local, regional, and international agrifood value chains.

1. Introduction

1.1 Setting the Scene: Agricultural Trade Patterns and Key Challenges

Africa's agricultural trade holds vast potential to drive economic transformation and enhance food security and nutrition, but remains constrained by structural imbalances and limited regional integration. The continent largely exports unprocessed commodities while importing most staples and inputs, leaving it a net food importer and vulnerable to global shocks. In fact, Africa's high food import bill underscores the scale of the trade imbalance and the continent's reliance on external markets. Intra-African trade remains low, hindered by weak infrastructure, non-tariff barriers (NTBs), and fragmented markets. Unlocking this potential requires investment in infrastructure, harmonized standards, and inclusive trade policies that align economic growth with sustainability and the Right to Food.

> Africa's high food import bill underscores the scale of the trade imbalance and the continent's reliance on external markets

In addition to analysing the latest available data and trends on agricultural trade in Africa, this policy note also draws on selected case studies provided by AgriBridge members that showcase practical examples of trade facilitation, regional integration, and sustainable value-chain development.

Agricultural Trade Patterns and Regional Dynamics

Africa-Global

Between 2003 and 2023, Africa's agricultural exports to other continents tripled from approximately. USD 30 billion to USD 93.3 billion, while imports grew even faster from approximately USD 30 billion to USD 118 billion, making the continent a net food importer.

Africa's top export categories between 2019-2023 are led by edible fruits and nuts (15 percent), cocoa (10 percent), and fish and crustaceans (6 percent). Africa's Regional Economic Communities (RECs) show distinct specializations when exporting to the rest of the world, including Africa: COMESA and EAC lead in coffee, tea, mate, and spices; ECOWAS focuses on cocoa; the SADC region excels in fruits and nuts; and UMA primarily exports fish and crustaceans.[1] The export products are characterized by a low degree of processing and limited added value.[2]

Imports are dominated by cereals (USD 31 billion), fats and oils (USD 12 billion), and sugar (USD 8 billion), which together constitute over two-fifths of all imports.[3] As Africa's agricultural food imports are increasing, there is a growing concern that this might drive out local producers and discourage domestic investment in commercial and larger-scale agriculture.[4] Rising domestic food demand, population growth, and urbanization continue to heighten Africa's dependence on global markets and vulnerability to external socio-economic and climatic shocks.[5]

Intra-Africa

Intra-African agricultural trade more than tripled from USD 6 billion in 2003 to nearly USD 20 billion in 2023.[6] Yet, intra-African agricultural trade remains limited, accounting for only around 20 percent of total agricultural trade, far below levels seen in other regions.[7] Importantly, though, as informal trade—especially cross-border trade—remains largely unrecorded, official data likely underestimate actual trade volumes.[8] Nevertheless, some progress has been made: although processed products are increasing, staple foods—the backbone of African food security—still undergo only modest processing, with only about 20 percent traded in processed or semi-processed form, and the majority still traded unprocessed.[9]

Africa–Germany

Africa's rapidly growing population positions the continent as an increasingly important market for consumer goods. Despite this potential, trade between African countries and Germany accounts for only a small proportion of Germany's total agricultural trade balance: in 2023, Germany imported agricultural raw materials and food products from Africa worth €4.1 billion (3.6 percent of total German agricultural imports), while Germany exported goods worth €2.4 billion (2.4 percent of total German agricultural exports). For Germany, the top African import partners (by trade value in Euros) are Côte d'Ivoire, Morocco, South Africa, and Ethiopia, while the leading African destinations for German exports are Morocco, South Africa, Algeria, and Libya.[10]

However, particularly in countries South of the Sahara (SSA), German exports have barely increased in value over the last ten years. In addition, two-thirds of exported goods to SSA are destined for a single country: South Africa. However, the German Chamber of Commerce and Industry (DIHK) states that early 2025 data indicate a rebound, with exports to Africa increasing by 7 percent and imports by 3 percent between January and July. While global trade remains largely stagnant, the agrifood sector could benefit from this renewed growth in commercial activities with Africa.[11]

With a growing African middle class and rapid urbanization, Africa presents a major market for German products and services, including agricultural inputs and processing facilities. German investment and trade can help address these gaps by providing expertise, technology transfer, and financing for value chain development and food processing. Conversely, German demand can boost African agricultural exports, while Germany gains from a stable and diversified supply of commodities and processed foods. As such, Germany can emerge as a major trading partner for Africa, where the 55 member states committed to increasing agrifood output by 45 percent, halving post-harvest losses, and tripling intra-African trade in agrifood products through the 2026-2035 Comprehensive Africa Agriculture Development Programme (CAADP) Strategy and Action Plan.[12]

> Germany can provide expertise and financing for value chain development and food processing

Trade Integration and Policy Context

The African Synthesized Regional Integration Index (ASRII) indicates moderate progress toward regional integration by 2025, with improvements in institutional frameworks, trade facilitation, and infrastructure. Intra-African total merchandise trade has advanced in the harmonization of legal frameworks, the establishment of one-stop border crossings, and the dismantling of NTBs. However, persistent structural constraints—weak transport and logistics, limited processing facilities, dependence on imports, and strict EU compliance requirements— limit Africa's ability to leverage its trade potential. High tariffs (averaging 15 percent) and non-tariff measures such as export bans and requirements on sanitary and phytosanitary standards (SPS), as well as technical barriers to trade standards, collectively restrict trade and can negatively affect food security.[13]

Despite advances in intra-African trade, regional and continental integration remains uneven. While some RECs have made commendable progress, others lag due to political instability, poor infrastructure, and limited resources. SADC and COMESA have achieved notable results in reducing tariffs, harmonizing rules of origin, and developing trade monitoring mechanisms[14], while the free movement of people and labour, vital for agricultural trade, is most advanced in ECOWAS and the EAC.[15]

Most RECs trade more within their regions than with the wider continent, reflecting the importance of intra-REC agreements and regional integration as a first crucial step towards continental integration.[16] Implementation of free trade areas and customs unions remains inconsistent, hampered by lengthy transitions, overlapping memberships, and disputes over common tariffs. The resolution of the Kenya–Uganda egg trade dispute under the EAC's NTB mechanism shows how removing protectionist measures can restore regional trade flows and directly enhance food security (see case study 1).

Deepening integration will require removing NTBs, harmonizing standards, improving infrastructure, embracing digitalisation, and strengthening coordination. Building the capacity of exporters to meet standards, alongside a strengthened AfCFTA, could enhance trade, resilience, and green economic growth.[17] This calls for political commitment, institutional capacity-building, and efficient, well-aligned governance structures. The AfCFTA offers a transformative opportunity to move toward an African Economic Community, but sustained effort and coherent implementation will be essential to unlock its full potential.[18] These integration efforts provide the foundation for translating political momentum into concrete action, as explored in Chapter 2.

1.2 Stronger Together: Trade as a Catalyst for Resilient African Agrifood Systems

Recent analysis emphasizes that the relationship between trade and food security is complex and context-dependent. Evidence also indicates that trade liberalization has, in several cases, improved food availability and stabilized consumption, while protectionist and self-sufficiency strategies have often led to volatility and reduced access to affordable food.[19,20]

However, fully liberalized trade can create adjustment pressures and employment losses in vulnerable sectors if not supported by adequate social and economic policies. Therefore, trade policy should be treated as one of several tools to enhance food security and resilience—complemented by investment in infrastructure, education, fair land ownership, and social safety nets—and aligned with broader development strategies. Coordinated action at national, regional, and multilateral levels is needed to balance short- and long-term objectives and ensure that trade contributes to sustainable and inclusive growth.[21,22]

The ECOWAS "Milk Offensive" exemplifies how coherent regional policy and investment coordination can strengthen local value chains, reduce dependence on imported milk powder, and promote cross-border trade in processed dairy products—illustrating the benefits of aligning trade, agriculture, and industrial strategies across West Africa (see case study 2).

Trade policy must align with socio-economic objectives, including nutrition, job creation, and poverty reduction

Both regional and multilateral trade agreements can enhance food security. Beyond tariff removal, agreements covering standards, services, innovation, and technology transfer can boost productivity, harmonize regulations, and expand trade in food and agricultural inputs. Regional trade agreements (RTAs) have been shown to increase intra-regional trade, and while WTO rules are designed to limit and ease trade restrictions, they often clash with domestic priorities and shifting geopolitical realities, while their direct effect on Africa's food trade is limited.[23]

Crucially, trade policy must align with socio-economic objectives, including nutrition, job creation, and poverty reduction. Strengthening agro-processing enhances value addition, competitiveness, and employment, while shifting dietary patterns and emerging markets create opportunities for innovation and entrepreneurship. For example, Uganda's coffee sector demonstrates how focused value-chain investment and compliance with EU sustainability standards can boost export value and create mutually beneficial trade with Europe (see case study 3). Livestock farming, too, represents an often-overlooked pillar of African agrifood trade and food security. In regions such as the Sahel and the Horn of Africa, trade in cattle, goats, poultry, milk, and hides accounts for up to 40 percent of agricultural trade value, with long-standing cross-border flows—such as between Chad and Nigeria or Mali and Côte d'Ivoire—anchoring local economies and stabilizing food supplies, including access to essential nutrients. However, political instability, market closures, and movement restrictions in several border areas increasingly disrupt these systems, reducing trade volumes and heightening price volatility. Recognizing and supporting pastoral and livestock trade—through secure mobility corridors, animal health systems, and local processing—is essential for inclusive agrifood systems and resilience across the continent.

The potential seen in agrifood trade by African decision makers is reflected in frameworks such as the CAADP Kampala Declaration (2026-2035), which prioritizes agro-industrialization, intra-African trade, and agricultural transformation, and aims to triple intra-African trade by 2035, with its first strategic objective targeting value addition and trade to enhance food security and sustainable growth.

2. Turning Momentum into Action: Pathways for Transformation

2.1 The African Continental Free Trade Area (AfCFTA)

The AfCFTA represents one of the continent's most ambitious initiatives and opportunities. Since its operationalization in 2019, it has become the largest free trade area in the world by membership, encompassing 55 African Union member states, of which 50 countries have now formally ratified the agreement.[24] Key protocols—such as those on the free movement of people and investment—are still under ratification, and actual trade under AfCFTA is limited as only a small number of countries have fully begun trading under the agreement (through the "Guided Trade Initiative").

However, countries such as Ethiopia recently started AfCFTA shipments in October 2025.[25] AfCFTA holds immense potential to advance the ambitions of the African Union's Agenda 2063 and the CAADP agenda by removing tariffs and NTBs, facilitating cross-border trade, and stimulating regional value chains. To reinforce this, the 2025 G20 Declaration underscores the pivotal role of trade in driving growth, food security, and inclusive development, highlighting the need for resilient agricultural systems, support for smallholder farmers, and climate-smart innovations. Africa is specifically recognized as a key strategic partner, with strong backing for the AfCFTA, intra-African trade, and investment in local production and value chains.[26]

Trade Facilitation and Implementation Challenges

Fully realizing the potential of the AfCFTA requires accelerated trade facilitation, including digitalized customs, paperless procedures, streamlined processes for SMEs, women traders, and agricultural producers, alongside improved logistics, harmonized standards, and simplified certification.[27] A practical illustration comes from the upgrade of the Nakonde Plant Quarantine and Phytosanitary Service (PQPS) laboratory on the Zambia–Tanzania border, where targeted investment at a key trade corridor significantly reduced clearance delays and strengthened cross-border trust (see case study 4).

While the RECs are making important efforts to fill existing gaps, continued capacity building and institutional strengthening of the AfCFTA remain essential to fully realize its potential. While the Guided Trade Initiative[1] has provided initial support, broader efforts are needed to ensure awareness of procedures and reduce logistical bottlenecks.

Inclusion and Participation

The private sector, particularly SMEs, forms the foundation of most African economies but often remains excluded from regional decision-making. Similarly, women and young people, despite being central to Africa's demographic and economic transformation, are still underrepresented in integration and trade processes. RECs must foster a

1 The Guided Trade Initiative (GTI) is a pilot program launched by the African Continental Free Trade Area (AfCFTA) Secretariat in October 2022 to operationalize and test the AfCFTA agreement in practice. It allows a selected group of countries and businesses to begin trading goods under AfCFTA rules of origin and preferential tariff arrangements, even while broader implementation is still ongoing.

business-enabling environment, promote public-private dialogue, and strengthen the role of SMEs in regional value chains. Germany can play a critical role in providing long-term, patient capital, fostering partnerships with African businesses, and ensuring that investments meet strong environmental and social safeguards, supporting inclusive and sustainable regional trade.

Trade under AfCFTA must benefit smallholder farmers, women, youth, and indigenous communities

Targeted initiatives to empower women and youth in trade can unlock new sources of growth, innovation, and social inclusion, driving more equitable and dynamic regional integration. This includes capacity building, increasing their representation in decision-making, fostering entrepreneurship and innovation, and promoting cross-border trade and business ventures to facilitate the inclusion of women and youth.[28] Crucially, trade liberalization under the AfCFTA must directly benefit smallholder farmers, women, youth, and indigenous communities, ensuring participation in formal markets and protecting the Right to Food. Moreover, policy measures should promote women's access to finance, support digital inclusion, and expand technical and vocational training to strengthen local capacities to tap into trade opportunities.

However, weak infrastructure remains a major barrier to agricultural trade and economic growth, limiting equitable market access, raising transport and storage costs, and constraining the development of competitive regional value chains. Overcoming these challenges requires coordinated action that extends well beyond governments. Robust PPPs, supported by transparent, predictable regulatory frameworks and long-term investment strategies, are essential to reducing risk, mobilizing private capital, and scaling the development of sustainable infrastructure such as roads, cold chains, energy systems, and logistics hubs. Such partnerships – for example, between African governments and German investors - could significantly improve connectivity, enhance agrifood system resilience, and unlock new economic opportunities across the continent.[29]

Vision

A successful AfCFTA implementation could set the foundation for an African Continental Customs Union (AfCCU) and a Continental Common Market (AfCCOM), advancing continental integration, boosting competitiveness, and driving inclusive economic growth. As a precondition for flourishing trade, further integration, good governance, peace, and security are essential, creating the level of stability and accountability that is required for investment at scale, job creation, and effective public service delivery. Facilitating the free movement of people fosters trade, cultural exchange, and regional solidarity, while expanding access to education, healthcare, and employment opportunities across borders.[30]

2.2 Germany's Trade and Development Priorities under the Current Government (since May 2025)

Public funding for development cooperation is declining globally, including in Germany, increasing pressure to leverage private and philanthropic finance. Reflecting this shift, the recently published Action Plan "Starke Partnerschaften für eine erfolgreiche Wirtschaft weltweit" (Strong Partnerships for a Successful Global Economy)[31] by the German Federal Ministry of Economic Cooperation and Development (BMZ) promotes closer collaboration with business to enhance opportunities for German corporates, aiming to align commercial interests with sustainable development goals. It aims to expand the German Government's "Compact with Africa" and strengthen cooperation on raw materials, renewable energy (e.g. green hydrogen), and labour-migration frameworks. Furthermore, the German coalition treaty of 2025 commits to sustainably increasing agricultural exports, strategically aligning and reinforcing instruments for foreign trade promotion, and explicitly supports the AfCFTA as a key framework for Africa's economic integration.[32]

Alignment with African Priorities and AfCFTA
Expanding the engagement of German companies abroad could generate significant benefits for rural and agricultural development in Africa, provided that social and environmental sustainability is considered and partnerships are designed in such a way that they are equitable and contribute to shared prosperity. When properly coordinated, German–African economic cooperation can reinforce priorities outlined in the AU Agenda 2063, the CAADP Kampala Declaration 2026–2035, and countries' National Agrifood Systems Investment Plans (NASIPs), while advancing the AfCFTA through investment in trade corridors, logistics, standards systems, and regulatory cooperation. Such alignment can promote agro-industrialization, food security, and resilience in Africa's rural economies.[33] The AU–EU Summit in November 2025 further underscored these priorities, with leaders pledging support for the development of regional, sustainable value chains and accelerated AfCFTA implementation.
This creates a favourable political context for Germany to expand partnerships that strengthen agro-processing and rural economies.[34]

> Sustainable economic development is vital for overcoming poverty and ensuring food security

Conditions for Sustainable and Equitable Cooperation
Sustainable economic development is vital for overcoming poverty and ensuring food security, and cooperation must align with the goals of the 2030 Agenda—especially Sustainable Development Goal (SDG) 2 and the human Right to Food. Germany's industrial and trade policies offer promising opportunities for African countries, yet excessive emphasis on exports or technology transfer without local adaptation risks reinforcing dependency.

The sole promotion of German exports often prioritizes the sale of finished goods, machinery, and digital systems that require continued exports of spare parts, software, and expertise to the countries. This can entrench reliance of African countries on external suppliers, limit technology adaptation to local contexts, and constrain the development of local industries. Moreover, without equitable knowledge-sharing and local value addition, such cooperation may perpetuate asymmetric economic relations, where African economies remain consumers rather than producers of advanced technologies, products, and services.

Partnerships must, therefore, promote local value addition and employment creation, equitable knowledge exchange, and compliance with human-rights and environmental due diligence standards, as set out under the EU Corporate Sustainability Due Diligence Directive (CSDDD) and the EU Deforestation Regulation (EUDR), amongst others. Governments need to establish transparent, participatory, and inclusive decision-making processes, conduct independent impact assessments, and implement robust monitoring and grievance mechanisms to safeguard the rights and livelihoods of small-scale producers, workers, and vulnerable communities.[35]

Opportunities in the green economy

Germany's commitment to a green economy, along with the transition it entails, can serve as a lever for new trade partnerships focused on renewable energy, sustainable agriculture, and climate-smart technologies. The November 2025 AU–EU Summit underscored the importance of sustainable resource management and biodiversity-based exports. This can create new opportunities for Africa–Germany collaboration, from greener industrial development partnerships and joint innovation agendas to expanding high-value bio-based trade. Moreover, the global shift toward renewable energy offers major potential for Africa–Germany cooperation.

Although costs have fallen sharply, high tariffs on renewable energy components and NTBs still restrict access to solar and wind technologies in Africa.[36] Deeper regional integration and South–South cooperation could lower these costs and enable African economies to join low-carbon value chains. The Talus project in Kenya, producing decentralized green ammonia and e-fertilizer, illustrates the potential of Germany–Africa cooperation on renewable-energy-based agritech that aligns trade with climate and sustainability goals (see case study 5). Coupled with the promotion of technical and vocational education and training (TVET) in collaboration with German companies, they can enhance local capacities, including skills for manufacturing, assembling, and maintaining agricultural machinery.

Toward a Co-Investment Model

Ultimately, this policy reorientation presents an opportunity to shift from a donor-recipient dynamic to a co-investment model—one that drives agricultural transformation, strengthens agrifood systems, and safeguards the right to food on both continents.

Recommendations:

1. Strengthen the Africa–Germany partnership

- Expand Africa–Germany cooperation and blended financing opportunities that prioritise local value addition, climate-smart innovation, technology transfer, sustainable infrastructure, and economic diversification — including the expansion of agro-processing through Special Agro-Processing Zones (SAPZs) — enabling a fair and sustainable partnership.
- Germany has a key responsibility to mobilise long-term, patient capital; support German firms to partner with African enterprises; and ensure that all trade and investment partnerships adhere to binding environmental and social safeguards. For this, trade and development policies need to be aligned, ensuring sustainable and mutually beneficial outcomes.
- Adopt a transparent and inclusive multi-stakeholder partnership model by engaging civil society, research organisations, the private sector, and African regional institutions in designing and monitoring economic cooperation.

- **By aligning financing, technology, and skills development with Africa's industrialisation goals, these partnerships can accelerate sustainable growth, enhance productivity, and create high-quality jobs. A more deliberate, mutually accountable co-investment framework will deepen economic ties, strengthen regional value chains, and position both Africa and Germany to benefit from a more resilient, green, and equitable global economy.**

2. Accelerate AfCFTA Implementation and Regional Integration

- Fast-track the implementation of the AfCFTA by advancing intra-African tariff elimination and prioritizing balanced trade agreements with Germany and the broader EU that offer environmental, social, and mutual economic benefits.
- Emphasise the removal of NTBs, the harmonisation of standards and rules of origin, the strengthening of phytosanitary systems, the expansion of digital trade systems, and strategic investments in trade-enabling infrastructure.
- Enhance the institutional capacity of RECs and the AfCFTA Secretariat to effectively coordinate, ensure policy coherence, monitor, and support the implementation of trade reforms and deeper regional integration

- **These measures will strengthen regional value chains, enhance value addition, and increase Africa's competitiveness, thus creating new opportunities for German businesses to engage alongside African partners in manufacturing, technology transfer, agribusiness, and green industrialisation. A deeper, more integrated African market will not only boost intra-African trade but also position Africa as a strong and reliable trading partner for Germany.**

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3. Support Smallholders, Women, Youth, and SMEs

- Promote inclusive growth and integration by expanding access to affordable finance, tailored skills development, and digital tools for smallholders, women, youth, and SMEs across local, regional, and international agrifood value chains.
- Germany has a responsibility to ensure that its development financing, private-sector engagement, and technical cooperation intentionally prioritise these groups, thereby helping to reduce barriers to entry, enhance productivity, and foster entrepreneurship.
- **By supporting market integration of these groups, Germany can help unlock the full potential of Africa's agrifood sector, strengthen regional value chains, improve food security, and contribute to a more equitable and resilient Africa–Germany trade and development partnership.**

Applied Policy Interventions: Evidence from African Agrifood Systems

The following section presents selected case studies provided by members of the AgriBridge Network, and offers a deeper examination of practical examples of trade facilitation, regional integration, and sustainable value-chain development.

Case Study 1:

Removing Non-Trade Barriers to Strengthen Food Security: Lifting the Kenya–Uganda Egg Trade Restrictions

In July 2022, Kenya imposed a 25 percent excise duty on imported table eggs under NTB Complaint No. NTB-001-084. The duty, introduced under the Excise Duty Act (2015) as part of a broader fiscal reform agenda, aimed to protect domestic poultry farmers and promote import substitution. However, because the measure fell outside the EAC's harmonised tariff framework, it effectively acted as an NTB, disrupting a long-standing regional trade in eggs and affecting food affordability. Before the duty was imposed, Uganda supplied over two million kilograms of table eggs annually to the Kenyan market, supporting household nutrition in Kenya and providing a steady income for Ugandan smallholder poultry farmers. After the measure was introduced, exports collapsed from 2.18 million kg in 2021 to 1 million kg in 2022, and further to 553,600 kg in 2023.[37] The restriction depressed farmer incomes in Uganda and contributed to higher egg prices in Kenya, demonstrating how NTBs can amplify food insecurity and undermine regional supply chains.
The dispute was escalated through the EAC's NTB resolution mechanism, with technical facilitation from TradeMark Africa (TMA). Following sustained bilateral and regional dialogue, the excise duty was removed in May 2023, restoring predictable market access and reaffirming the role of rules-based institutions in managing trade tensions.

Policy Lessons for Trade and Food Security

- Predictable, harmonised trade policies are essential to regional food security.
- Protectionist fiscal measures can unintentionally raise food prices, constrain supply, and destabilise cross-border livelihoods.
- Functional NTB monitoring systems and rapid-response diplomacy help prevent prolonged market disruptions.
- Trade facilitation aligned with agricultural and nutrition goals directly supports household food access and smallholder incomes.

The lifting of the excise duty reaffirmed that effective NTB resolution strengthens both regional market integration and food system resilience—critical priorities for the EAC.

Case Study 2:

The West African Milk Offensive: Reducing Import Dependence and Building a Regional Dairy Economy

Demand for dairy products in West Africa is rising rapidly due to urbanisation and shifting diets. Yet 60–70 percent of this demand is met by imports, largely low-cost milk powder from Europe and Asia that is reconstituted or processed locally. This dependency leaves the region vulnerable to global price swings, widens trade deficits, and limits income opportunities for millions of small-scale herders who cannot compete with subsidised imports. To address these structural weaknesses, ECOWAS launched the so-called "Milk Offensive", a regional initiative aimed at revitalising local dairy value chains.

The programme integrates:

- Investments in cold chain infrastructure, including solar-powered refrigeration and milk collection centres;
- Improved animal feed and veterinary services to boost productivity;
- Harmonised regional quality and health standards, enabling intra-regional trade in fresh and processed dairy;
- Professionalisation of collectors, cooperatives, and mini-dairies through training and certification.

Early results from Mali, Senegal, and Burkina Faso show that targeted measures—minimum farmgate prices, structured collection networks, and stronger producer cooperatives—can significantly increase the share of locally sourced milk in urban processing plants. In some zones, processing plants now source a growing proportion of raw milk from local pastoralists during the peak season, raising incomes and strengthening domestic markets.

Policy Lessons

- Regional coordination reduces import dependence and strengthens food security by harmonizing standards, improving collection systems, and enabling cross-border trade in fresh and processed dairy.
- Targeted public and blended investments unlock private sector participation by upgrading cold chains, veterinary services, and feed systems, making local dairy more competitive with imports.
- Empowering local actors —especially cooperatives, herders, and small processors— drives inclusive growth through minimum farmgate prices, stronger producer organizations, and skills development that translate into higher incomes and more resilient rural livelihoods.

The "Milk Offensive "demonstrates the potential of coordinated regional policies and blended financing. European partners, including Germany, can support these efforts through technology transfer, vocational training, and blended finance - partnering with West Africa to advance a competitive, climate-resilient dairy sector aligned with the SDGs and the Right to Food.

Case Study 3:

Targeted Value Chain Investment as a Win–Win Strategy: Uganda's Coffee Transformation

Uganda's coffee sector illustrates how focused value chain development, supported by strategic policy action and international cooperation, can deliver mutual gains for Africa and Europe. Coffee remains Uganda's top agricultural export, generating USD 1.7 billion as of February 2025[38], and is a critical income source for millions of smallholder farmers. Uganda has prioritised coffee through clear institutional reforms and a coordinated strategy. The creation of the Uganda Coffee Development Authority (UCDA) in 1991 and the National Coffee Research Institute (NaCoRI) in 2005 established a strong regulatory and research foundation. Implementation of the Coffee Roadmap guided investments in improved seedlings, extension services, and disease control.

These measures increased exports from 4.7 million bags in 2017/18 to 8.45 million in 2021/22, before a climate-related decline. By mid-2024, production had recovered thanks to sustained public and private investment, resulting in 7.77 million bags exported between August 2024 and August 2025, valued at USD 2.22 billion.[39] Strengthened quality control and adoption of good agricultural practices further increased the value of Uganda's green coffee, from USD 1.8/kg in 2017/18 to USD 2.4/kg in 2022/23, exceeding the Coffee Roadmap targets.[40] In 2024, under the government's rationalisation policy, the Ugandan Parliament passed the Coffee Amendment Bill, integrating UCDA into the Ministry of Agriculture while maintaining its regulatory mandate.[41] To ensure compliance with the EU Deforestation Regulation (EUDR), the government allocated UGX 13.9 billion (approximately USD 3.8 million) (2024/25) to establish a national traceability system and register one million farmers by the end of 2025.

Germany imported 1.21 million tonnes of green coffee in 2024, with Uganda ranking fourth among suppliers, exporting 53,000 tonnes in 2023. Imports from Uganda grew at 7.9 percent per year between 2017 and 2021, demonstrating a strong basis for deeper cooperation.[42,43,44] Opportunities for collaboration include joint investment in climate-resilient production, support for digital traceability systems aligned with the EU Deforestation Regulation (EUDR), and the promotion of value addition and quality grading in Uganda, such as roasting, packaging, and supply chain enhancement. Expanding access to sustainable finance for certification, agroforestry, and agricultural inputs can further strengthen Uganda's coffee sector and support mutually beneficial trade.

Policy Lessons

- Strengthen value chain governance: Clear institutional frameworks and coordinated strategies—such as Uganda's UCDA, NaCoRI, and Coffee Roadmap—are essential for boosting productivity, quality, and export performance.
- Invest in productivity and climate resilience: Sustained public–private investment in improved planting material, extension services, and climate-smart production stabilises yields and supports long-term sector growth.
- Support compliance with emerging market standards: Early investment in traceability systems and farmer registration prepares exporters for regulations such as the EU Deforestation Regulation, safeguarding market access and enhancing competitiveness.

Uganda's coffee story shows that coherent policies, targeted investments, and international partnerships can create a resilient, high-value agricultural sector that benefits both Africa and Europe.

Case Study 4:

Strengthening Sanitary and Phytosanitary Capacity at a Critical Trade Node: The Nakonde PQPS Laboratory, Zambia

When the 2023–24 drought sharply reduced Zambia's maize harvest and pushed millions toward food insecurity, the country faced an urgent need to import maize quickly while safeguarding domestic crops from pests and diseases. A targeted upgrade of the Nakonde Plant Quarantine and Phytosanitary Service (PQPS) laboratory—located at the Nakonde One-Stop Border Post—proved pivotal. The Government of Zambia, with support from TradeMark Africa and UK funding, refurbished the Nakonde PQPS lab and equipped it with PCR machines, ELISA kits, microscopes, centrifuges, solar backup systems, and reliable water and power. This decentralised phytosanitary testing capacity to the border, reducing dependence on laboratories in Lusaka. Before the upgrade, all samples had to be transported to Lusaka—causing clearance delays of over 72 hours. On-site diagnostics have reduced the average turnaround to about 30 hours, enabling critical maize imports to move faster without compromising disease surveillance.

This reduction in processing time lowered the risk of spoilage, eased border congestion, and maintained strict screening for threats such as Maize Lethal Necrosis (MLN), which can devastate national harvests. The investment also strengthened operational ties with Tanzania's plant-health authorities. The two countries now use aligned diagnostic protocols, share portable testing tools, and exchange phytosanitary data more routinely, thereby improving trust and reducing NTBs in cross-border maize trade.[45]

Policy Lessons

- Invest at high-impact nodes: Strategic upgrades at border posts can collapse major trade bottlenecks.
- Match trade facilitation with SPS protection: Speed must be paired with strong plant-health capacity to safeguard future harvests.
- Use blended finance for rapid, high-impact improvements: Government–donor partnerships accelerate delivery.
- Embed resilience in infrastructure: Solar, reliable utilities, and trained staff ensure continuity during crises.

The Nakonde project shows how a focused, well-timed trade-policy intervention can protect immediate food supplies while strengthening long-term agricultural resilience and regional market integration.

Case Study 5:

Decentralised Green Ammonia for Sustainable Fertilizer Supply in East Africa

Ammonia is a critical input for global agriculture, with about 80 percent of production used for fertilizer. Traditional "grey" ammonia is highly carbon-intensive, emitting roughly 2.4 tonnes of CO_2 per tonne produced. Rising climate commitments and volatile fertilizer prices have strengthened interest in green ammonia, produced using renewable energy and green hydrogen.[46] Decentralised production can lower transport costs, reduce emissions, and decrease fertiliser import dependency. Its viability depends on factors such as demand, renewable energy availability, and plant costs. Africa's abundant solar, wind, and geothermal resources position it well for green hydrogen and ammonia production, with countries like Kenya, Namibia, Morocco, Egypt, Senegal and South Africa already advancing projects.[47]

In Kenya, Talus Renewables and the Kenya Nut Company have established a small-scale green ammonia unit in Naivasha, producing 1 tonne per day, used mainly on-farm, significantly reducing logistics costs. Preliminary comparisons with nitrogen fertilizers available in Kenya (based on November 2024 import prices) indicate that locally produced green ammonia can be cost-competitive.

However, delivery models for smallholders and farmer adoption of green ammonia still remain unresolved. All green ammonia is used for commercial nut production for now, while smallholder trials are underway and further pilots are being planned nationwide.[48] Kenya is a major fertilizer entry point for Uganda, Rwanda, and the DRC through the Port of Mombasa. Existing frameworks—the EAC Fertilizer Policy, EAC Fertilizer Standards Harmonisation (2024), and EAC Fertilizer Bill (2020)—create a conducive environment for regional trade in green ammonia and e-fertilizers, with potential for Kenya to become a regional hub.

Policy Lessons

- Support decentralised, renewable-based fertilizer production to reduce dependence on global markets.
- Invest in renewable energy infrastructure to improve cost competitiveness.
- Strengthen regional standards and certification for green fertilizers.
- Develop delivery systems that ensure smallholder access and uptake.
- Use blended finance to de-risk early-stage green industrial projects.

The Talus model shows how decentralised green ammonia can support climate-aligned fertilizer systems and enhance food security in East Africa.

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