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Food Processing and Nutrition in Africa: *Improving Diets under the Kampala Declaration*

By Aisha Musaazi S. Nakitto and John Ulimwengu

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Editorial

Since its adoption by the African Union (AU) in 2003, the Comprehensive Africa Agriculture Development Programme (CAADP) has been Africa's primary policy framework for agricultural transformation, wealth creation, food security, economic growth, and prosperity. It guides the African Union Commission (AUC), the African Union Development Agency-New Partnership for Africa's Development (AUDA-NEPAD), Regional Economic Communities (RECs), and Member States in driving agricultural transformation toward a self-reliant and productive Africa.

The recently adopted **Kampala CAADP Declaration** on ***"Building Resilient and Sustainable Agrifood Systems in Africa"*** and the associated **CAADP Strategy and Action Plan (2026-2035)** will build on the success and deepen the progress achieved after two decades of CAADP implementation, during which Africa significantly improved in economic and agricultural growth, poverty reduction, nutrition outcomes, and agricultural trade expansion. The next 10-year cycle of CAADP implementation must further deepen its focus to incorporate lessons while responding to emerging issues to accelerate sustainable food system transformation within a context of climate change and multifaceted stressors and shocks.

The longevity and continued success of CAADP can be attributed to its credibility as a shared framework designed to guide Member States toward agricultural transformation and economic growth. Driven by the CAADP principles and values, with emphasis on African ownership and mutual accountability, alongside review and benchmarking, data and analytics have been central to CAADP's evidence-based planning and implementation approach. As Africa prepares for the implementation phase of the Kampala CAADP Declaration, which comes into force on January 1, 2026, evidence and robust data analysis will continue to remain indispensable to successful implementation on the ground. This is the rationale behind AKADEMIYA2063's ***Kampala Policy Brief Series***.

The purpose of the policy briefs is to serve as reference documents for policy analysts and planners across AU Member States as they prepare their programs in response to the Kampala CAADP Declaration. The policy briefs will provide a synthesis of a large body of research tackling topics of strategic relevance to Africa's development agenda in parallel with key issues to be addressed during the new phase of CAADP implementation to provide insights, analyze emerging ideas, review cross-cutting thematic areas, and propose policy recommendations that can be replicated for sustainable impact.

The evidence presented in the Kampala Policy Brief Series is derived from published research and data by AKADEMIYA2063's scientists and collaborators across Africa and outside the continent. These lessons are made accessible to policymakers, non-state actors, and other practitioners at continental, regional, and national levels, as well as development partners, to support the implementation of CAADP 2026-2035. In addition to packaging the lessons and insights into comprehensive yet accessible knowledge products, AKADEMIYA2063 is facilitating policy dialogue through webinars. During these sessions, the findings are presented to a broad range of stakeholders to guide programmatic interventions supporting the implementation of the Kampala CAADP Agenda.

Abstract

Africa's food systems are undergoing rapid transformation, yet they remain burdened by a dual nutrition crisis: widespread undernutrition alongside rising obesity and diet-related non-communicable diseases (NCDs). Food processing stands at the intersection of this challenge—offering both risks and opportunities. This policy brief argues that when guided by nutrition-sensitive strategies, food processing can be harnessed to improve dietary quality, enhance food safety, reduce postharvest losses, and create economic opportunities, particularly for women- and youth-led enterprises. However, the proliferation of ultra-processed foods (UPFs) threatens to worsen public health outcomes unless appropriate regulation and consumer education accompany industrial growth. Drawing on evidence from the Malabo Montpellier Panel's 2024 *VALUE-UP* report and innovative case studies across Africa, the brief recommends a multi-pronged approach: supporting fortified and minimally processed foods, strengthening small and medium-sized processing enterprises, advancing food safety systems, and investing in public-private partnerships for nutrition-focused innovation. Linking agrifood processing to better nutrition outcomes is essential to achieving the goals of the Kampala Declaration and the CAADP Strategy (2026–2035).

1. Why Food Processing Matters

Africa's food systems face dual nutrition challenges: widespread undernutrition driven by poverty and food insecurity, and an increasing prevalence of obesity and diet-related NCDs, partly linked to changing consumption habits and other factors such as sedentary lifestyle, especially in urban settings. These issues require a rethinking of food system strategies, with food processing positioned as a tool not only for economic transformation but also for improving public health outcomes.

Food processing is a fundamental pillar in transforming Africa's food systems, acting as a critical bridge between agricultural production and consumer demand. It extends far beyond preserving edibility; food processing enables the transformation of raw agricultural commodities into products that are safe, nutritious, marketable, and tailored to the evolving dietary needs of a growing, urbanizing population. Beyond nutrition, the food processing sector is an engine for inclusive economic growth. It offers significant off-farm employment opportunities, especially for women and youth, who dominate small and medium-sized processing enterprises across the continent. According to the Malabo Montpellier Panel (2024), nearly a third of manufacturing employment in several sub-Saharan African countries is in food processing, with most firms operating informally and led by women.

Processing enterprises also create value-added market opportunities for smallholder farmers by increasing demand for raw agricultural inputs, improving farmgate prices, and stimulating commercialization. The emergence of agrifood-processing clusters has demonstrated how strategic integration of farmers, processors, and retailers can reinforce entire value chains (Jenane, Ulimwengu, and Tadesse 2022).

Despite these opportunities, Africa remains a net food importer, with an annual food import bill of around USD 80 billion—projected to reach USD 90 billion by 2030 (Malabo Montpellier Panel 2024b). Additionally, the share of processed foods in these imports has increased from 28 percent in 2000 to 33 percent in 2020 (UNCTAD 2024). With Africa's food and beverage markets projected to surpass USD 1 trillion by 2030 (Malabo Montpellier Panel

2024b), investing in food processing offers a strategic pathway to reduce trade deficits, build resilient local economies, and achieve food security and improved nutrition at scale.

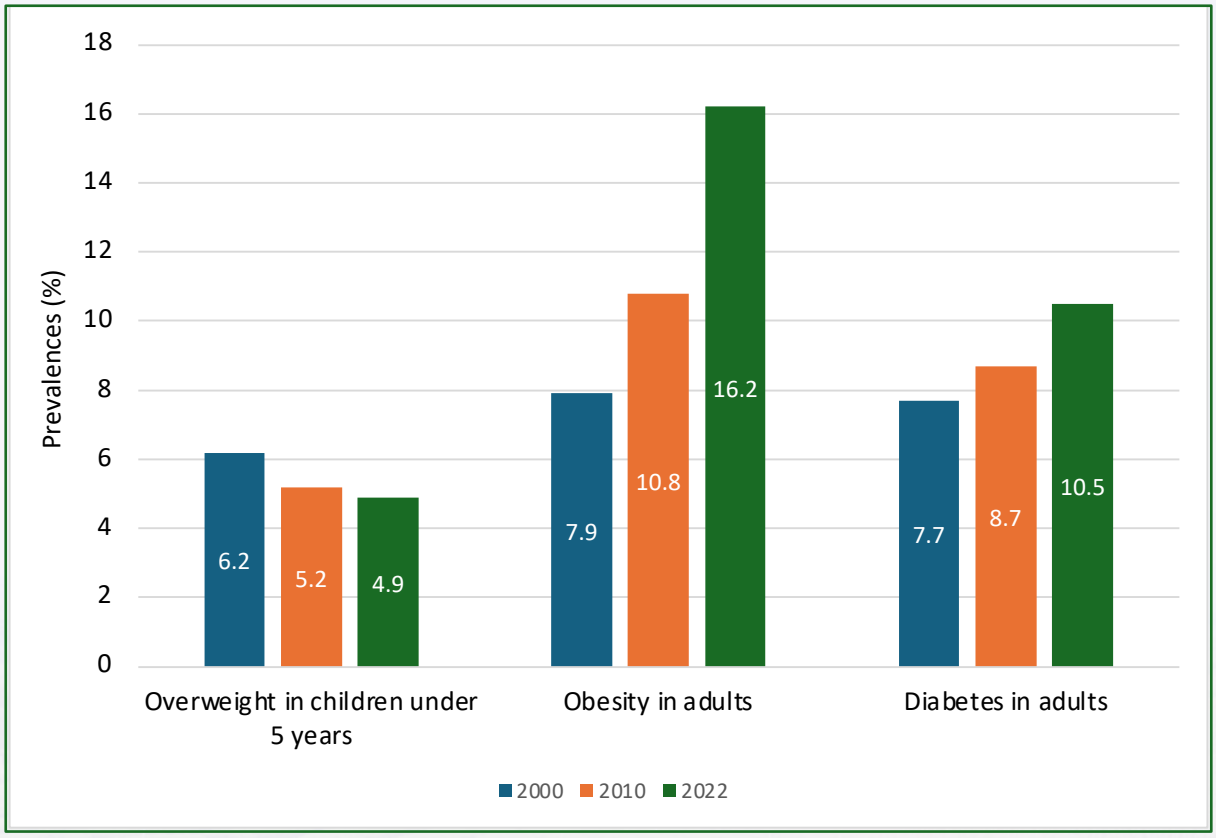
This policy brief responds to the growing urgency of aligning food processing policy with the African Union's CAADP strategic objectives under the Kampala Declaration (AUC and AUDA-NEPAD 2024). It presents evidence-based recommendations drawn from country case studies in the Malabo Montpellier Panel's *VALUE-UP* report on food processing (Malabo Montpellier Panel 2024a), the 2022 Annual Trends and Outlook Report (Jenane, Ulimwengu, and Tadesse 2022), and recent scientific findings, emphasizing food processing's role in achieving inclusive agro-industrialization, improved food security and nutrition, and sustainable growth. As stakeholders prepare for the CAADP agenda (2026-2035), this brief serves as a tool to guide targeted investments, institutional innovation, and coordinated policy reform across Africa's agrifood systems.

2. Nutrition and Food Security in Africa

The challenge is both supply- and demand-driven. Healthy food is often unaffordable (FAO 2024), and incomes remain low. Hence, inclusive growth and food affordability are essential. In addition, consumption of healthy foods is also driven by availability, convenience, desirability, socio-cultural factors, and consumer behavior, among others (Glatzel et al. 2024). Africa also faces a 'double burden'—persistent undernutrition alongside diet-related non-communicable diseases (NCDs) such as obesity, especially in urban centers. Overall, the continent faces a complex nutritional landscape marked by persistent undernutrition, rising obesity rates, and widespread micronutrient deficiencies.

According to the recent *State of Food Security and Nutrition in the World* report (FAO et al. 2024), 58 percent (845 million) of Africa's population faced moderate and severe food insecurity in 2023. In the same year, 20.4 percent (298 million) suffered from hunger, up from 15.9 percent (192 million) in 2010. These trends are further compounded by the unaffordability of healthy diets, with nearly 925 million people on the continent unable to access nutritionally adequate food (FAO et al. 2024). In addition to undernutrition, diet-related NCDs such as type 2 diabetes and obesity are rising, especially in urban areas, fueled in part by the consumption of ultra-processed and nutrient-poor foods among both children and adults (Malabo Montpellier Panel 2024a).

Figure 1: Prevalences of diet-related non-communicable diseases among children and adults in Africa



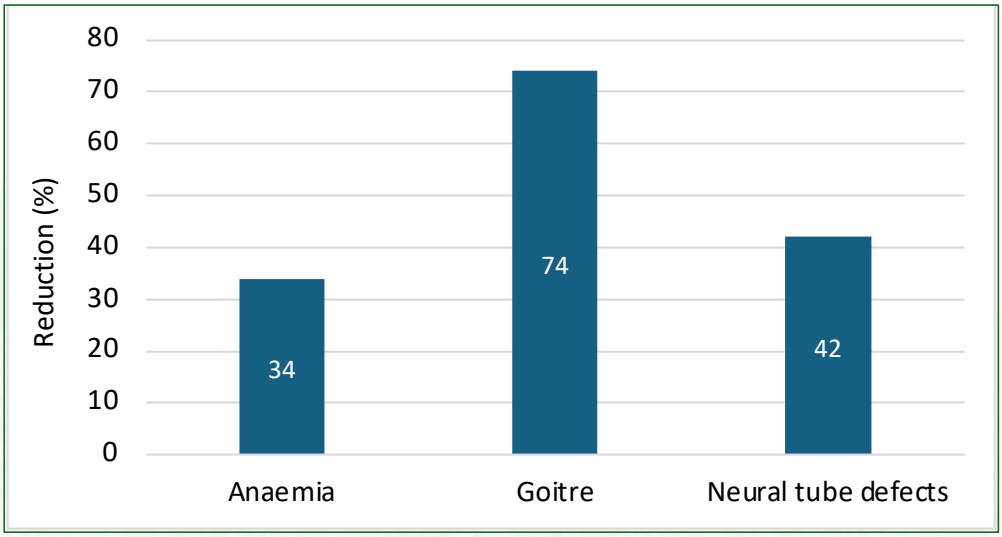
Source: Authors, based on FAO et al. (2024) and Zhou et al. (2024).

Micronutrient deficiencies, often referred to as "hidden hunger," remain widespread in sub-Saharan Africa (SSA). Recent data by Stevens et al. (2022) show that 62 percent of preschool-aged children in SSA are deficient in at least one critical micronutrient—iron, zinc, or vitamin A—compared to 56 percent globally. Additionally, among non-pregnant women of reproductive age, 82 percent in SSA face deficiencies in at least one of iron, zinc, or folate, significantly higher than the global average of 69 percent. These persistent and widespread deficiencies highlight the urgent need for targeted nutrition interventions and policy action across the region (Malabo Montpellier Panel 2024a).

3. Nutrition-Sensitive Processing Innovations

When applied appropriately, food processing can play a transformative role in improving nutrition across the continent. Processing technologies enhance food safety, reduce postharvest losses, and extend the availability of perishable products such as fruits, vegetables, and animal-sourced foods – thereby improving food security and dietary diversification. Moreover, food processing provides an opportunity for micronutrient fortification, a key intervention to address widespread deficiencies. This is evidenced by a study by Keats et al. (2019), which reported that large-scale food fortification with iron, iodine, and folic acid significantly reduced micronutrient deficiencies in lower-middle-income countries (Figure 2).

Figure 2: Reduction of anemia, goiter, and neural tube defects through large-scale fortification with iron, iodine, and folic acid in low-middle-income countries



Source: Authors, based on Keats et al. (2019).

Scientific studies support the importance of processing methods in determining nutritional outcomes. Food waste and industrial byproducts, which are rich in nutrients such as micronutrients, bioactive compounds, and dietary fiber, can be processed into nutritious, tasty foods and ingredients, thereby enhancing food security and nutrition (Malabo Montpellier Panel 2024a).

To curb the rise in diet-related NCDs, the consumption of traditional and underutilized foods can be expanded if, through processing, the time and energy required to prepare them are reduced while their nutritional quality is maintained or even enhanced. Scientific studies confirm that nutrient-preserving processing methods—such as soaking, sprouting, steaming, and dehulling—can significantly improve the nutritional quality of legume-based foods, particularly common bean (Phaseolus vulgaris). These traditional but optimized techniques have been shown to improve both macronutrient and micronutrient profiles in ways beneficial to public health, as in a study by Nakitto, Muyonga, and Nakimbugwe (2015), which reported that:

- Soaking, sprouting, dehulling, and steaming reduced antinutritional factors like phytic acid and tannins to negligible levels, which would otherwise inhibit mineral absorption. This combined processing improved the extractability of iron by 57 percent and zinc by 16 percent, and may therefore increase the bioavailability of the two critical micronutrients, often deficient in African diets.
- Bean flour produced from a combination of the above processing methods also exhibited 14 percent higher protein digestibility than conventionally boiled beans.

  This bean flour, produced through combined techniques, also requires less cooking time than dry beans. Such findings have broader implications for staple foods, suggesting that promoting nutrient-enhancing or preserving technologies, especially among SME food processors, could significantly improve the dietary quality of commonly consumed foods.

These nutrient-enhancing processing methods are particularly suitable for agrifood processing SMEs, enabling the production of shelf-stable, easy-to-prepare, and nutritious staple foods that meet the needs of urban and rural consumers alike. Their low-tech nature makes them scalable in low-resource settings, especially when supported by proper training and effective enforcement of food safety regulations (Nakitto, Muyonga, and Nakimbugwe 2015).

However, not all processing is beneficial. The proliferation of ultra-processed foods (UPFs), often high in sugar, salt, and unhealthy fats, is a growing concern. Policy and regulation must also promote minimally processed alternatives and drive the demand.

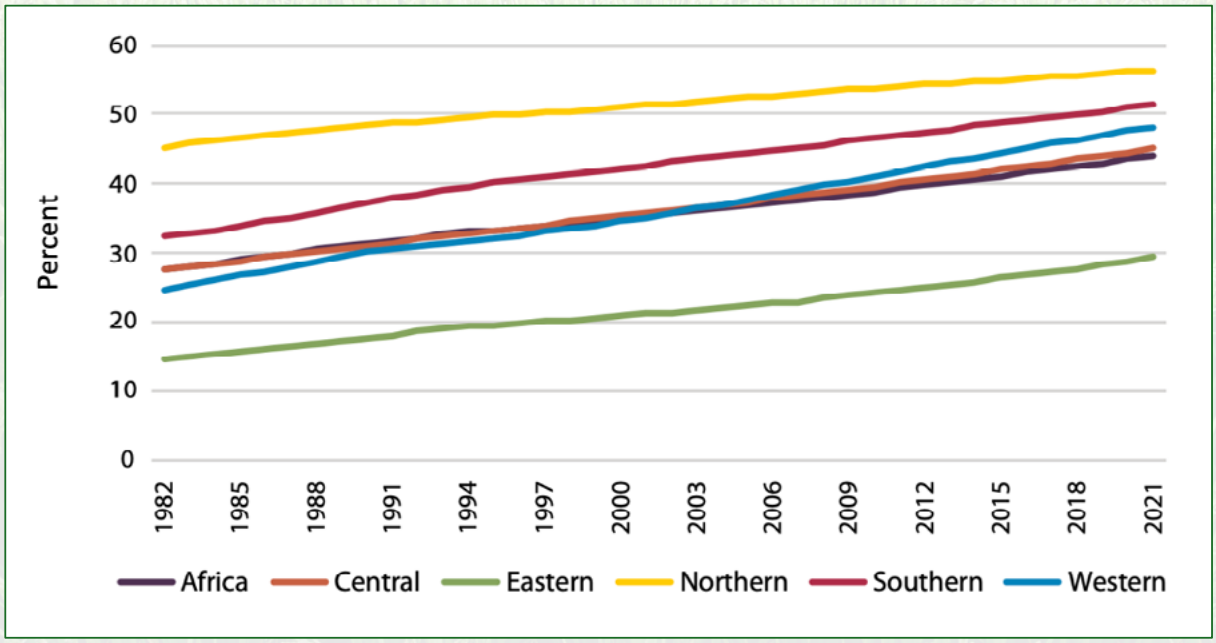
A critical challenge in Africa lies in the dominance of low-level, informal processing that often lacks nutrient retention standards, food safety controls, or adequate nutrition labelling. Processing requires improved techniques and machinery, as well as trained experts to manage the processing. The VALUE-UP report by the Malabo Montpellier Panel (2024) emphasizes that many small-scale processors replicate similar low-value products, often high in calories and low in essential nutrients. This can inadvertently exacerbate all forms of malnutrition if diets rely on energy-dense, nutrient-poor foods.

Therefore, the link between nutrition and food processing is also policy-driven. As emphasized in the CAADP Strategy and Action Plan (2026–2035), improving nutrition requires aligning agro-industrialization policies with national nutrition goals. This includes investing in nutrition-sensitive value chains, enforcing food safety regulations, and supporting innovations that prioritize the production of affordable, diverse, and fortified or nutritious processed foods.

4. Drivers and Barriers to Food Processing Growth in Africa

The expansion of Africa's food processing sector is driven by a combination of economic, demographic, and infrastructural factors. As urban populations (Figure 3) expand and disposable incomes rise, particularly among Africa's middle class, there is increasing demand for convenient, shelf-stable, and nutritionally adequate packaged foods that meet modern expectations for taste, enhanced nutritional content, and food safety. The growth in food processing is also enhanced by improvements in infrastructure.

Figure 3: Share of urban population in total population in Africa



Source: ReSAKSS 2022 Annual Trends and Outlook Report (Jenane, Ulimwengu, and Tadesse 2022)

These trends have reshaped consumption patterns, making processed foods a central feature of modern African diets. By 2030, consumer spending in Africa is projected to reach USD 2.6 trillion, with food accounting for approximately 40 percent —the largest share of total expenditures (AGRA 2022). These transformations are opening new market opportunities for the continent's local food processors to expand and innovate to meet the growing demand for processed food products.

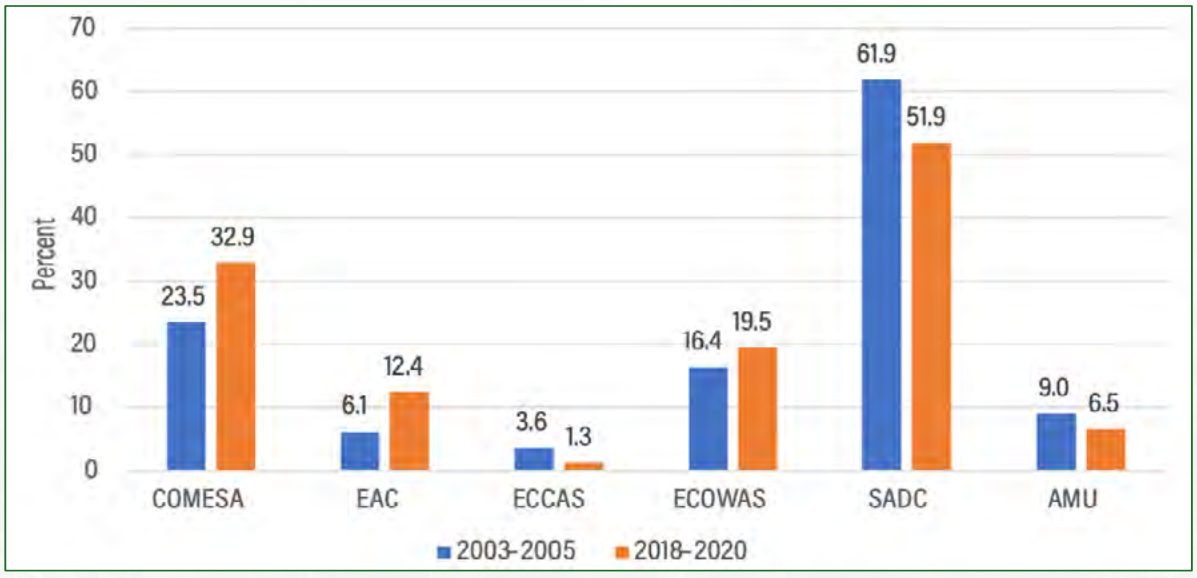
Moreover, the rapid growth of small food processing enterprises—known to have a higher potential for job creation, local sourcing, and innovation compared to some larger firms (Ellis, Fang, and McMillan 2022)—can help absorb well-educated and skilled youth labor, hence reducing the high youth unemployment on the continent (nearly 30 percent) (AfDB 2016). Several African countries have introduced specific policies and institutions to support SME processors. For example, Ghana's Ministry of Food and Agriculture supports small-scale food processors through the Planting for Food and Jobs program, while Senegal's National Agency for Agricultural Integration (ANCAR) provides technical training and credit facilitation. While SMEs are crucial, a long-term strategy should also support large-scale processing firms to enhance reach and consistency in nutrition delivery.

However, technological and product innovations alone are insufficient. Studies emphasize the importance of behavior change communication to ensure consumers recognize and demand nutritious options. For example, successful interventions in Ethiopia and Senegal combined fortified complementary foods with social marketing and nutrition education, resulting in increased uptake of improved products (Ruel et al. 2018; GAIN 2022). Without efforts to shift consumer preferences, even the most nutrient-rich foods may be underutilized.

Expanding the demand, availability, and affordability of processed foods boosts the need for agricultural raw materials, creating new market opportunities for rural small-scale farmers. This increased demand can raise farmers' incomes, improving their ability to access diverse, nutritious diets and helping reduce undernutrition. Additionally, convenient, ready-to-eat, and easy-to-prepare foods save time for both urban and rural households—particularly benefiting women by freeing up time for other productive and income-generating activities (Malabo Montpellier Panel 2024a).

The increased recognition by African governments of the strategic role of agrifood processing is further supported by regional integration initiatives such as the African Continental Free Trade Area (AfCFTA), which aims to reduce trade barriers and expand regional markets. According to the Africa Agriculture Trade Monitor 2022 (Bouët, Odjo, and Zaki 2022), intra-African export of processed agrifood products increased from 63 percent of traded foods between 2003 and 2005 to 72 percent between 2018 and 2020. This trend was also observed for most RECs (Figure 4).

Figure 4: Role of each Regional Economic Community (REC) in intra-African trade of processed agricultural goods, based on their share of total agricultural exports



Source: Africa Agriculture Trade Monitor 2022 (Bouët, Odjo, and Zaki 2022).

Note: COMESA = Common Market for Eastern and Southern Africa; EAC = East African Community; ECCAS = Economic Community of Central African States; ECOWAS = Economic Community of West African States; SADC = Southern African Development Community; AMU = Arab Maghreb Union

The SADC, led by South Africa, has been the dominant player in regional trade, though its share dropped from 62 percent to 52 percent over the two periods. This decrease is due to the overall growth in intra-African trade, which rose from 108 percent to 146 percent (Bouët, Odjo, and Zaki 2022). AfCFTA is expected to stimulate intra-African trade in processed foods, offering SMEs—including those led by women—greater access to cross-border markets and economies of scale (Jenane, Ulimwengu, and Tadesse 2022).

Despite increased policy interest and investment, food processing remains constrained by numerous barriers. One major constraint is the fragmentation and undercapitalization of food processing SMEs, which often produce low-value, undifferentiated goods using outdated equipment. Click or tap here to enter text. Another key structural barrier is the limited availability of technically skilled labour. Only 19 percent of higher education graduates in Africa specialize in science, technology, engineering, and mathematics (STEM) (AfDB 2022), which hampers the adoption of advanced food technologies and the development of high-quality, nutritious processed foods. Moreover, the gender gap in STEM is significant—25 percent of female students enrolled in higher education institutions pursued STEM fields, compared to 34 percent of male students (AfDB 2022; Malabo Montpellier Panel 2024a). Hence, the lack of modern processing equipment and insufficient technical expertise hinders productivity and product quality (Jenane, Ulimwengu, and Tadesse 2022).

Other barriers include poor infrastructure, such as transport and unreliable electricity, limited access to finance and inputs, weak regulatory frameworks, and fragmented markets. Thus, most SMEs face challenges in meeting food safety and quality standards, which limits their ability to scale or access regional markets. Furthermore, gender and youth disparities also persist, as women- and youth-led firms often lack equal and favorable access to finance, training, and formal markets. Despite systemic barriers, women have developed resilient business models using local knowledge and are increasingly contributing to innovation in food production (Malabo Montpellier Panel 2024a). However, without concerted policy efforts, these structural weaknesses will continue to undermine the potential of food processing to transform Africa's food systems.

To fully harness Africa's food processing sector's potential, a dual approach is needed: removing structural and policy barriers while scaling up the enablers. This includes investing in a globally competitive African agrifood sector by increasing access to improved machinery and techniques, expanding access to technical education and skilling programs, and ensuring that AfCFTA implementation is inclusive of small-scale, youth-led, and women-led enterprises (Malabo Montpellier Panel 2024a).

5. Conclusion and Recommendations

Africa is home to nearly 300 million people facing hunger, even as diet-related NCDs such as obesity and diabetes rise, particularly in urban settings. This dual burden of malnutrition and overnutrition is symptomatic of broader challenges in Africa's food systems. Food processing—the transformation of raw agricultural products into market-ready goods—offers a powerful lever for addressing these challenges, if guided by nutrition-sensitive policies, innovation, and inclusive economic strategies.

This policy brief has demonstrated that food processing can do more than extend shelf life or generate income—it can fundamentally improve diets, preserve essential nutrients, and ensure year-round access to fortified and diverse foods. At the same time, poorly regulated or profit-driven processing has contributed to the spread of ultra-processed foods (UPFs), which are high in sugar, salt, and unhealthy fats and often low in nutrients. These products are particularly pervasive among middle-class populations and residents of low-income urban environments, where they appeal to consumers for their convenience and affordability (Dolislager et al. 2022). Additionally, when women earn income outside the household, their time for cooking often becomes constrained. As a result, many turn to ultra-processed or convenience foods—like packaged flour, instant meals, and ready-to-eat snacks—that require less preparation time. Studies in sub-Saharan Africa show that increased labor force participation leads women to favor processed foods to save the hours previously spent on traditional home food preparation. Research across several countries confirms that time scarcity is a major driver of higher consumption of ultraprocessed foods, highlighting a trade-off between convenience and nutrition when women balance work and household duties (Reardon et al. 2021). If left unchecked, the growth of UPFs undermines national health goals and entrenches cycles of diet-related disease.

Below are selected recommendations to advance Africa's food processing sector and improve nutrition outcomes on the continent.

- ***Food Processing Should be a Public Health Priority.*** It is imperative that African governments approach food processing not merely as an industrial strategy but as a public health priority. Central to this shift is the recognition that processing must be harnessed to protect and enhance nutritional value, especially for vulnerable populations. Regulatory systems must be modernized to set nutrient standards, restrict harmful additives, and monitor food quality across both formal and informal sectors. Government investments should prioritize technologies and incentives that promote minimally processed, nutrient-rich foods, such as whole grains, legumes, and fortified staples.

- ***Strengthen Linkages between Smallholder Farmers and Processors.*** To ensure a steady supply of raw materials and support the growth of food processing industries, policies should focus on strengthening the linkages between smallholder farmers and processors. This can be achieved through contract farming, producer organizations, and the use of digital platforms that connect actors across the value chain. Investments in modern farming technologies and machinery are essential to boost productivity. Additionally, supportive regulations and infrastructure improvements—especially in storage, marketing, distribution, and packaging—are critical to making these linkages effective and sustainable. Ultimately, this increases the income levels of rural farmers, enabling them to afford healthy diets.

- ***Calibrated Support to SMEs and Large Enterprises.*** At the enterprise level, both small-scale processors and larger industrial firms play essential roles. SMEs, which dominate Africa's food processing sector, are engines of local employment and innovation. Many are led by women and youth and are deeply embedded in rural economies. Supporting these SMEs with tailored financing, technical training, and business incubation can multiply their impact. However, a long-term strategy must also support scalable, larger processing firms, which are critical for ensuring consistent product quality, economies of scale, and a wide geographic reach, especially in urban centers and export markets.

- ***Interlocking Agro-processing and Nutrition Outcomes.*** A key priority going forward is to link agro-processing efforts directly to improved nutrition outcomes. This means going beyond supply chain efficiency and focusing on the nutritional quality of final products. Governments and regional bodies should support the production of fortified foods, especially for staples consumed by people living in poverty. Public-private partnerships can play a pivotal role in developing nutrition-sensitive product lines, such as ready-to-cook flours enriched with iron, zinc, and vitamins, or weaning foods designed for infant and maternal health.

- ***Leveraging Specialized Agencies for Tailored Interventions.*** Innovations need not be housed only in ministries since dynamic, semi-autonomous agencies can deliver tailored support at speed and scale. African countries already house examples of institutions leading this agenda. The Kenya Industrial Research and Development Institute (KIRDI) has supported the development of small-scale fortification technologies and linked them with training and incubation programs. Similarly in Senegal, *the Délégation Générale à l'Entrepreneuriat Rapide* (DER) and the *Institut de Technologie Alimentaire* have provided vital support to local processors focused on improving the nutritional value of indigenous products.

- ***Sensitization for Sustained Impact.*** Consumer behavior also remains a major determinant of success. Even the most nutritious foods will not succeed if they are not understood, trusted, or desired. Hence, technical innovation must be accompanied by demand-side strategies, such as nutrition education, social marketing campaigns, and product labelling reforms. Institutional buyers—such as school feeding programs and public hospitals—can also create guaranteed markets for healthy processed foods, thereby encouraging SME participation and setting public standards.

In sum, if Africa is to realize its potential for food system transformation, food processing must be reimagined as a vehicle for inclusive, health-centered growth. This means balancing industrial goals with nutritional objectives, strengthening regulatory frameworks, and anchoring innovation in the needs of the continent's most vulnerable populations. The opportunity is vast: with strategic investment, Africa can emerge not only as a hub for agro-industrial productivity, but also as a global leader in the development and delivery of nutritious, affordable, and culturally relevant processed foods. Scaling nutritious food processing, supported by strong regulatory systems and trade integration, can position Africa as a global leader in inclusive, nutrition-centered agro-industrialization (AUC and AUDA-NEPAD 2024; Malabo Montpellier Panel 2024).

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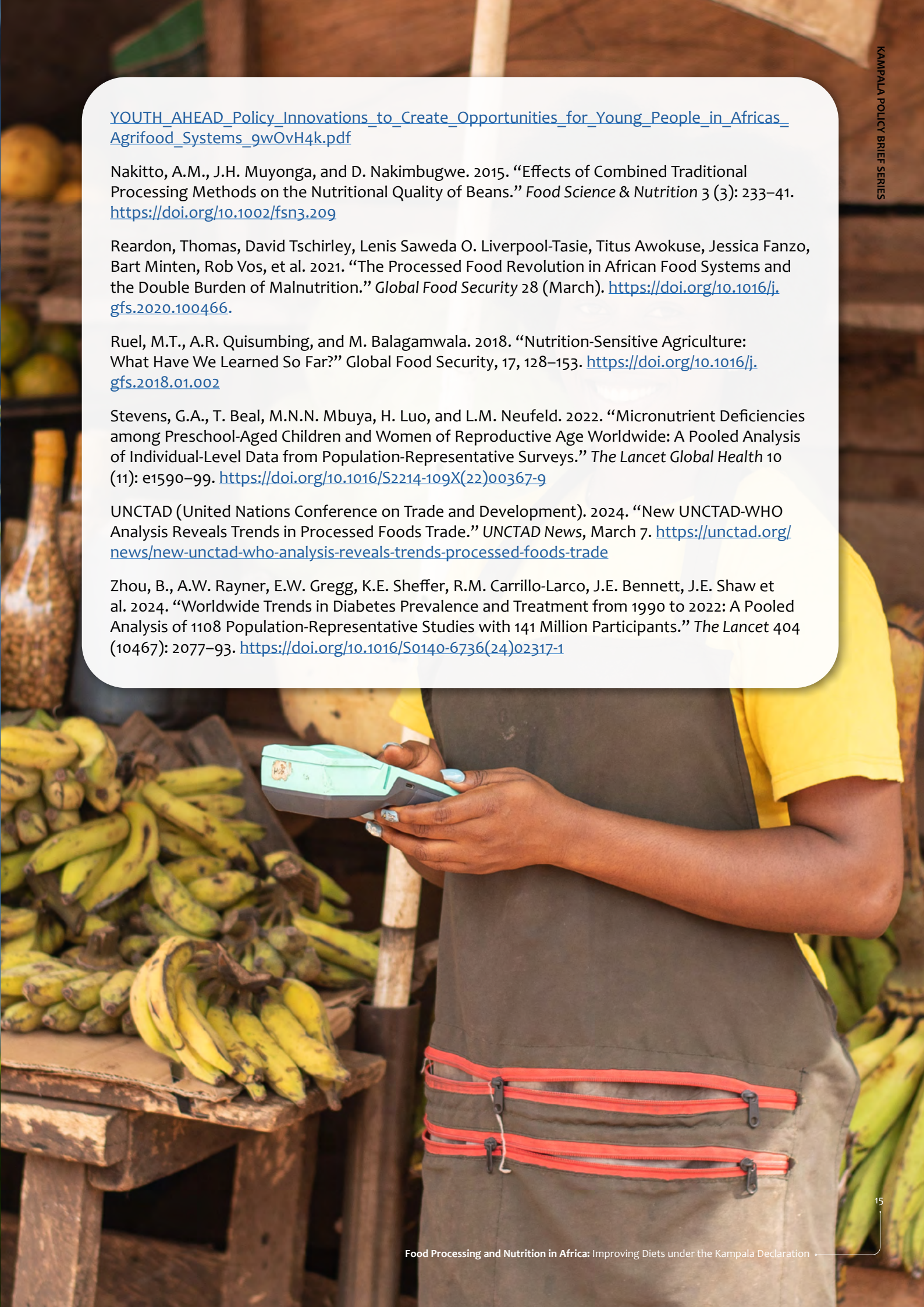

ABOUT AKADEMIYA2063

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 Agenda 2063 and grounded in the recognition of the central importance of strong knowledge and evidence 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. Inclusive, evidence-informed policymaking is key to meeting the continent's development aspirations, creating wealth, and changing livelihoods for the better.

AKADEMIYA2063's overall mission is to create, across Africa and led from its headquarters in Rwanda, state-of-the-art technical capacities to support the efforts by the Member States of the African Union to achieve the key goals of the African Union's Agenda 2063 of transforming national economies to boost growth and prosperity.

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