COOPERATION BETWEEN UKRAINE AND AFRICAN COUNTRIES IN AGRICULTURE: CENTRAL AFRICA

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INTRODUCTION

The report is aimed to outline the directions of partnership between Ukraine and Central African countries in agri-food sector. In this report, we analyse three most-populated countries in Central Africa (DR Congo, Angola, and Cameroon) to unveil their potential of partnership with Ukraine in agricultural and food processing industries. First, we analyse food security profiles of the observed countries and compare them with regional benchmarks. Second, we examine agri-food trade patterns and the level of food self-sufficiency for the selected countries. Third, the local agricultural sector is analysed to understand the potential of food production in Central Africa. Then, it is followed by the overview of current challenges of local agricultural producers. Finally, we provide the overview of the national agri-food policy and its effect on local production in each of the three countries.

EXECUTIVE SUMMARY:

Agriculture in Central Africa, specifically in the Democratic Republic of the Congo (DRC), Angola, and Cameroon, remains vital for economic growth, but faces significant challenges related to food insecurity, infrastructure, and climate change. While these countries have made strides in improving agricultural productivity, demographic pressures and structural inefficiencies continue to exacerbate food insecurity in the region.

In the DRC, food insecurity has worsened, with over 35% of the population undernourished as of 2022. This happened largely due to political instability, weak institutions, and ongoing conflicts that disrupt agricultural production. Angola, on the other hand, has seen an improvement, with the prevalence of undernourishment dropping from 64% to 22% in the last two decades, driven by income from oil export and targeted investments in agriculture. Meanwhile, Cameroon boasts a relatively low prevalence of undernourishment, at 6%, thanks to steady agricultural growth and supportive policies.

Agri-food imports play a crucial role in these countries, particularly for cereals, oilseeds, and meat products. Angola's cereal import dependency ratio is notably high at 43%, reflecting strong demand fuelled by rising incomes. Cameroon, in contrast, has a more balanced import structure but remains reliant on food imports for key commodities. Exports are primarily concentrated in cash crops, with the DRC exporting coffee and oilseeds, Angola specializing in fish, and Cameroon being a major exporter of cocoa. Trade with Ukraine remains limited across the region, with cereals and milling products being the primary imports.

In all three countries, the sector remains a major employer, with over half of the workforce engaged in agriculture, despite a gradual decline in its contribution to GDP. Cassava and plantains dominate crop production across the region, serving as staple foods and accounting for much of the cultivated land. The DRC is a global leader in cassava production, while Angola has seen growth in maize, bananas, and sugarcane. Cameroon is a major producer of cassava, plantains, and oil palms. Livestock farming also plays an important role, with Cameroon leading in cattle and poultry farming, and Angola showing rapid growth in poultry and pork production. While agriculture in all three countries remains mostly aimed at subsistence, Angola stands out for its more commercial-oriented production. Despite these differences, agriculture remains central to food security and employment in the region.

The main challenges facing agriculture in Central Africa include land tenure issues, climate change, and poor infrastructure. In the DRC, unclear land rights discourage investment in sustainable farming practices, while Angola and Cameroon face increasing climate variability, which threatens crop yields. Limited access to markets, high transportation costs, and insufficient storage facilities also plague the region, leading to high post-harvest losses and reduced market efficiency.

Agricultural policies in the region are primarily focused on increasing productivity, improving food security, and fostering sustainable practices. Angola's National Grain Plan (PLANAGRÃO) aims to boost domestic grain production, while Cameroon's agricultural development strategies are aligned with its Vision 2035 plan, prioritizing mechanization and modernization. In the DRC, the National Agricultural Investment Plan (NAIP) emphasizes boosting productivity through stakeholder inclusion and capacity building, though weak institutional capacities have hindered effective implementation.

Considering the specifics of agri-food sector in Central African states, we can highlight the main **channels of cooperation** between these countries and Ukraine:

1. Liberalization of trade regimes for export of high value-added products from Ukraine (wheat flour, oilseed meals, skimmed milk powder).
2. Strengthening the political relations with authorities of DR Congo through the intensification of humanitarian aid to the country («Grain from Ukraine» initiative).
3. Common infrastructural projects (grain silos, cold storage, melioration systems).
4. Assistance in land tenure reform for DR Congo.
5. Veterinary services for cattle farming (DR Congo) and poultry production (Angola).
6. Transfer of agricultural technologies (drones, precision farming systems, crop selection).

1. DEMOCRATIC REPUBLIC OF THE CONGO

1.1. FOOD SECURITY

Democratic Republic of the Congo has the highest population in the region and is the fourth populous state on the continent. Over the last two decades, the population almost doubled, reaching around 100 mln. people as of 2022 (Figure 1). It is projected that by 2050, the DRC will have 215 million people and join the world's 10 most populated countries. The demographic progress is based on high birth rates and improvements in local medicine (Emina, 2023).

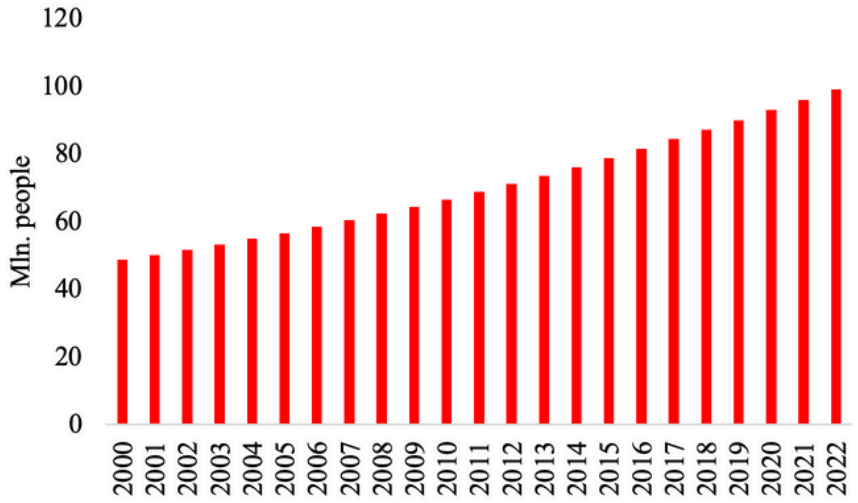

Figure 1. Total population in DR Congo

Source: World Bank

The national economy of DRC showed gradual growth over the last decades, however, the GDP per capita remains below than in neighboring Angola and Cameroon (Figure 2). The main challenges for Congolese economy are military conflicts, political instability, weak institutions, low level of industrialization.

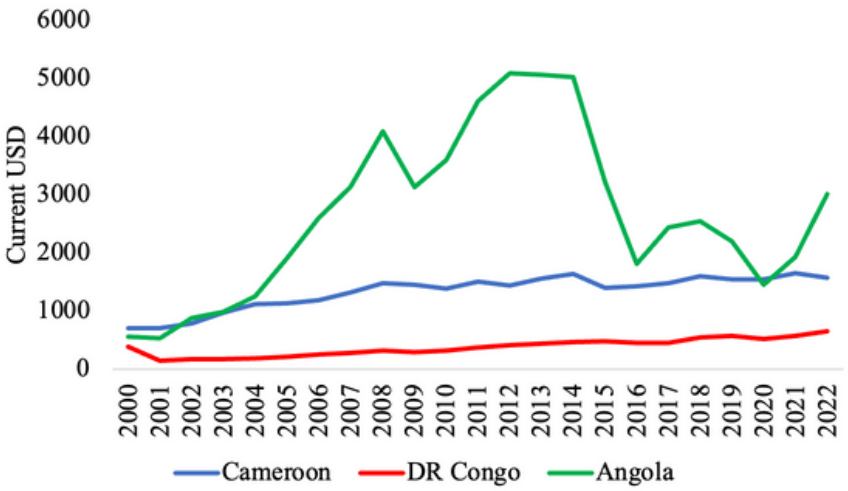

Figure 2. GDP per capita in DR Congo

Source: World Bank

With the demographic growth, the prevalence of undernourishment in DR Congo gradually increased. Since 2000, the proportion of population facing food insecurity, increased from 28 to 35% (Figure 3).

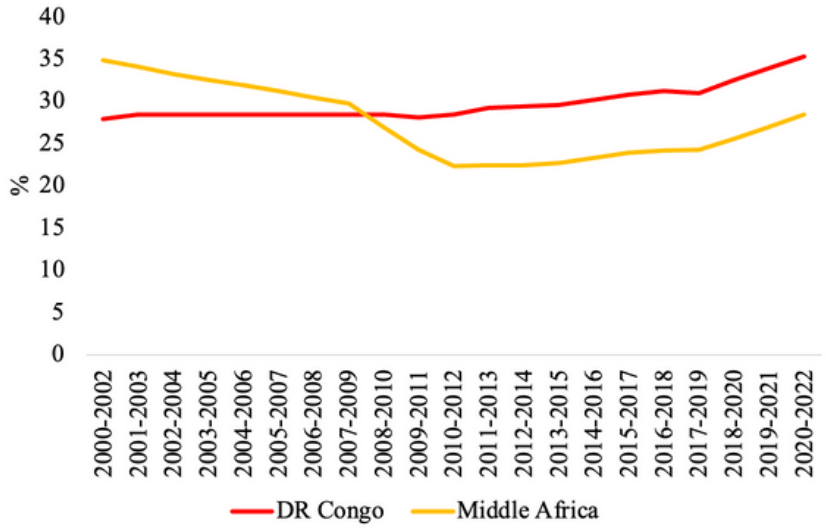

Figure 3. Prevalence of undernourishment in DR Congo

Source: FAOSTAT

The number of undernourished persons shows the same pace of growth as total population. Since 2000, its number doubled and reached 24 mln. people in 2022 (Figure 4).

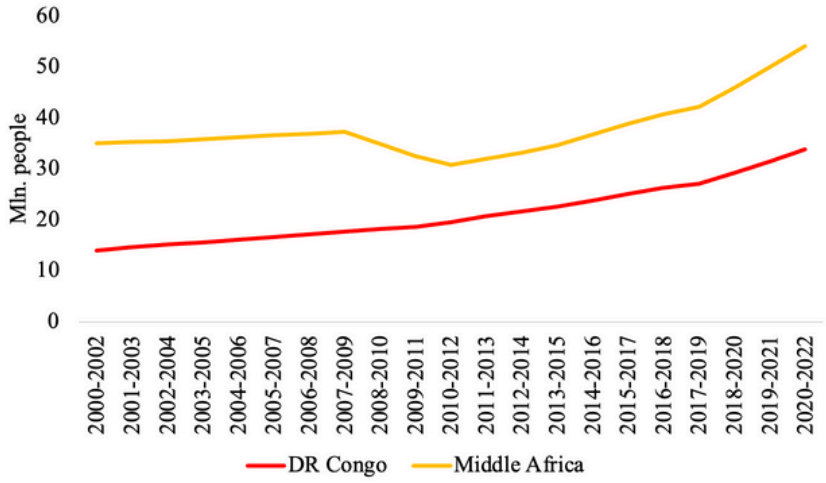

Figure 4. The number of undernourished persons in DR Congo

Source: FAOSTAT

Meanwhile, the average dietary energy supply adequacy demonstrated gradual decrease from 103 to 99% (Figure 5).

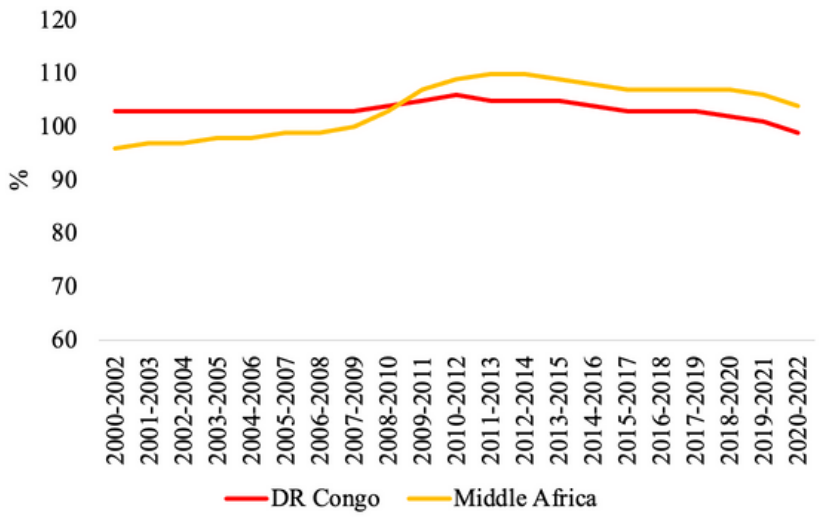

Figure 5. Average dietary energy supply adequacy in DR Congo

Source: FAOSTAT

As Figure 6 shows, the share of dietary energy supply derived from cereals, roots and tubers remains at much higher level compared to the average level at the region (79% versus 69% in 2022). This indicates serious problems with malnutrition.

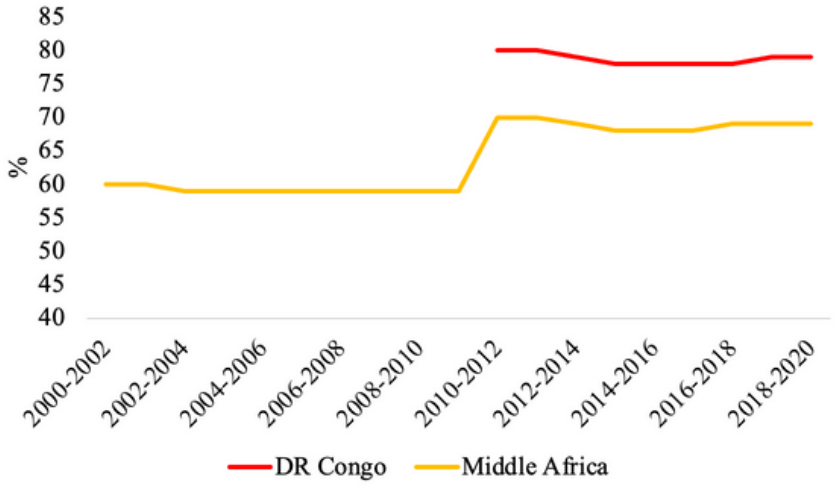

Figure 6. Share of dietary energy supply derived from cereals, roots and tubers in DR Congo

Source: FAOSTAT

At the same time, the average protein supply remains on the level below the national average (30 versus 45 grams/person/day) (Figure 7). The similar gap is observed for animal protein supply (Figure 8).

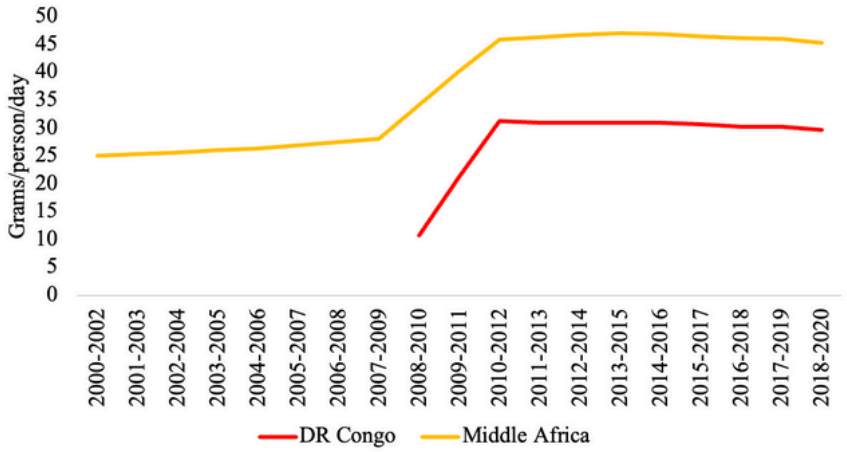

Figure 7. Average protein supply in DR Congo

Source: FAOSTAT

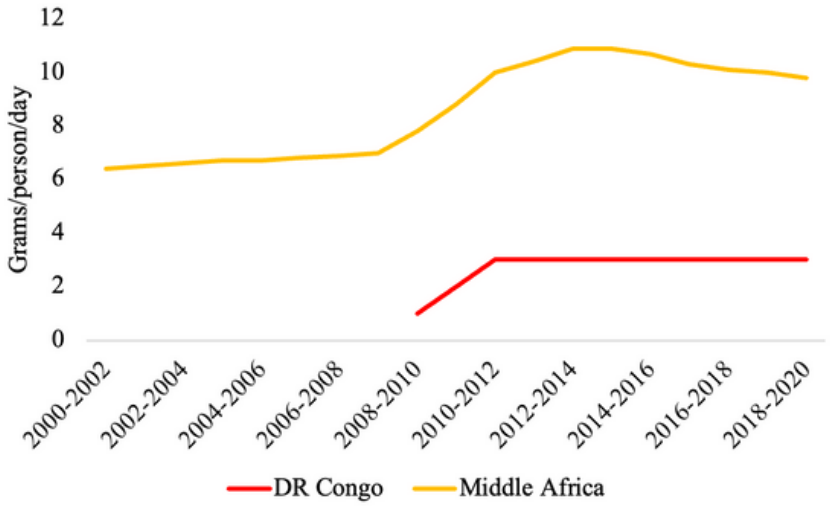

Figure 8. Average animal protein supply in DR Congo

Source: FAOSTAT

Despite the low level of food security, the per capita food supply variability in DR Congo is much less volatile than on average in the region (Figure 9).

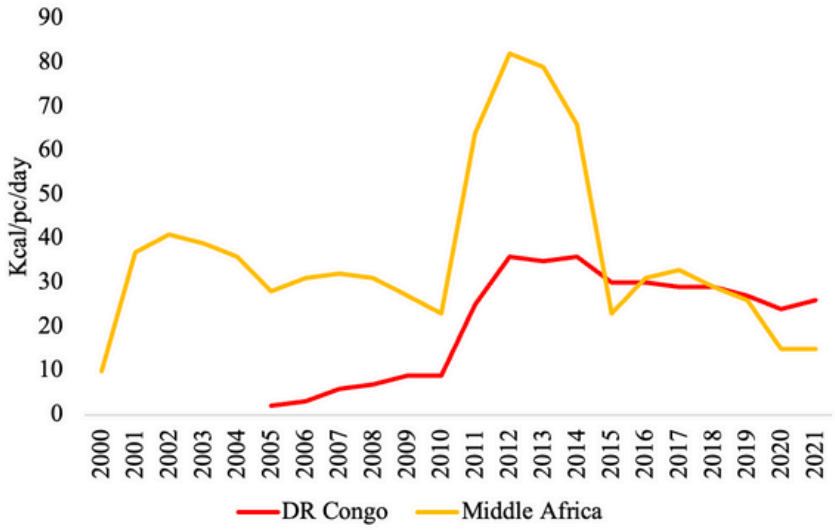

Figure 9. Per capita food supply variability in DR Congo

Source: FAOSTAT

As Figure 10 indicates, the cereal import dependency ratio in DRC is below the regional average (20 versus 29% in 2022). This might reflect the low local food demand, caused by tough economic situation.

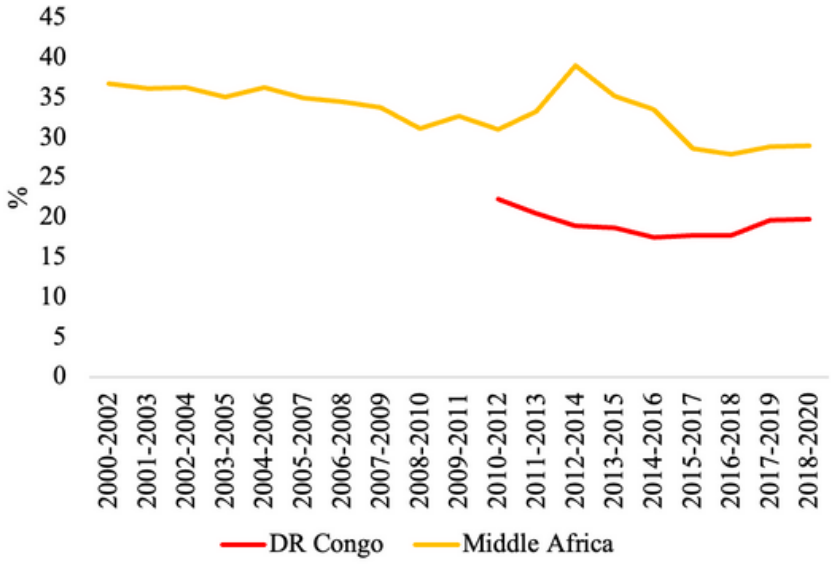

Figure 10. Cereal import dependency ratio in DR Congo

Source: FAOSTAT

1.2. AGRI-FOOD TRADE

Congolese food import has remained relatively unchanged throughout the late 2010s and started to grow since 2020. The main import categories are cereals and edible preparations (Figure 11). The presence of the latter, as well as of the milling products implies there is a potential for the local processing industry.

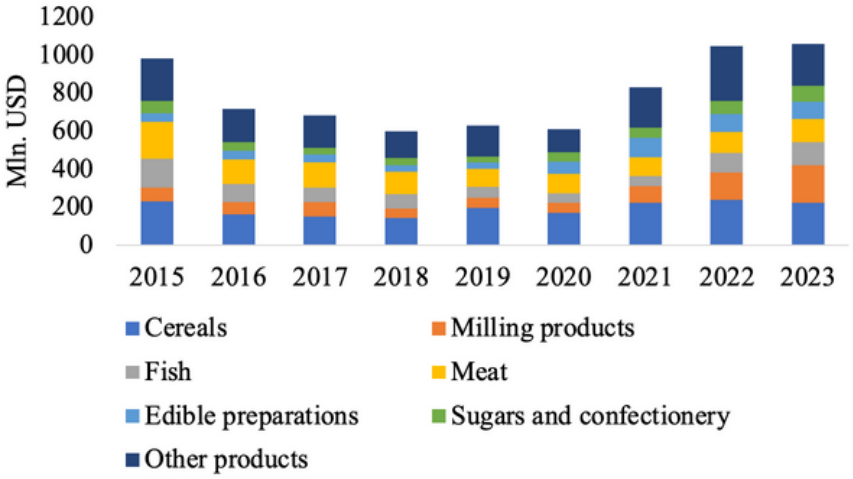

Figure 11. Product structure of food import to DR Congo

Source: ITC Trade Map

The geographical structure of import is quite diversified. The main food importers to DR Congo are South Africa, Tanzania, and Brazil (Figure 12).

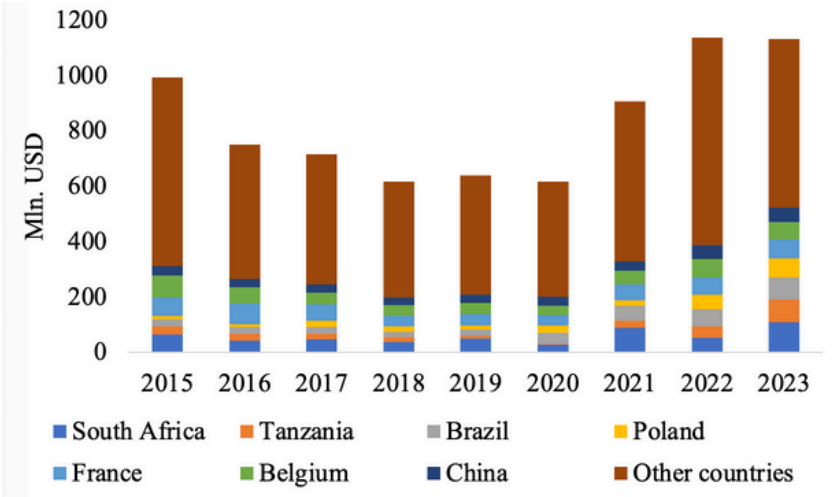

Figure 12. Geographical structure of food import to DR Congo

Source: ITC Trade Map

Ukraine's share in Congolese food imports is quite low. In the recent years, except for 2017-2019, when Ukraine exported milling products to DR Congo, the main category of Ukrainian import was meat (Figure 13).

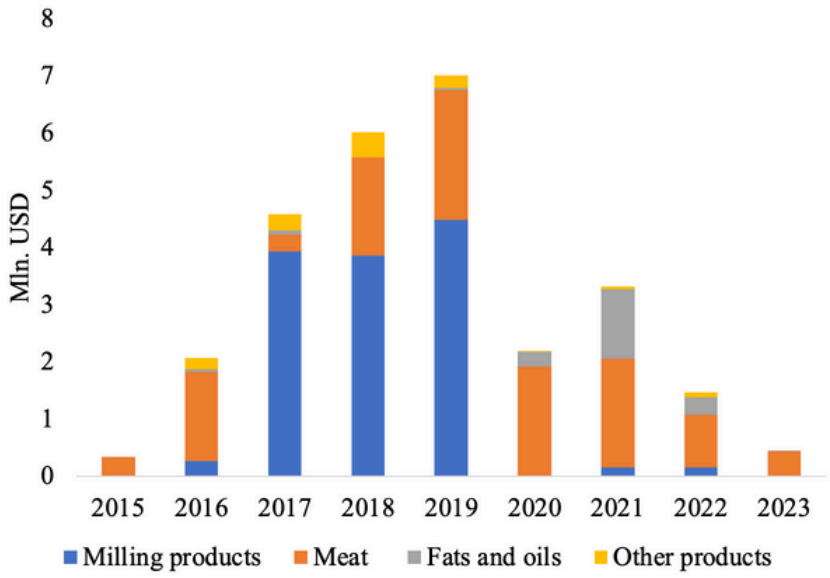

Figure 13. Food import from Ukraine to DR Congo

Source: ITC Trade Map

Food exports from DRC were relatively stable over the last decades. The primary export commodities are coffee and oilseeds (Figure 14).

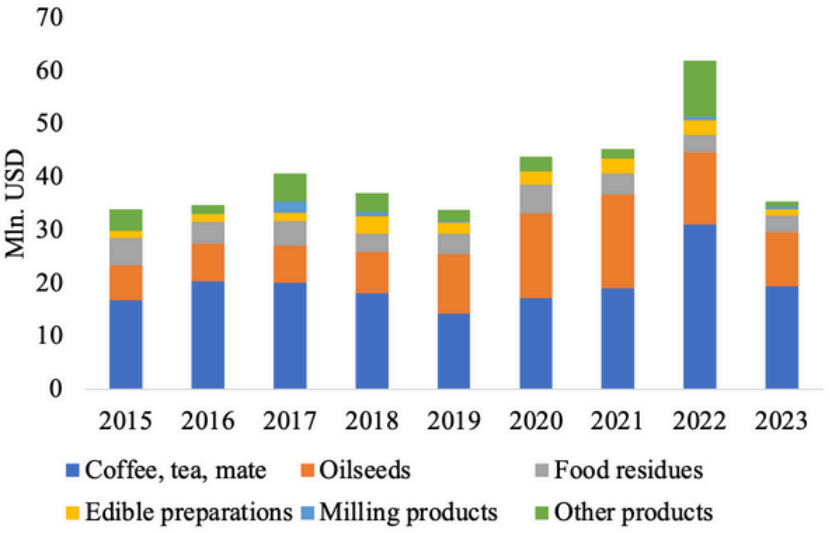

Figure 14. Product structure of food export from DR Congo

Source: ITC Trade Map

The primary destinations of food export are Indonesia, India, and Belgium (Figure 15). Export volumes to Ukraine are quite small.

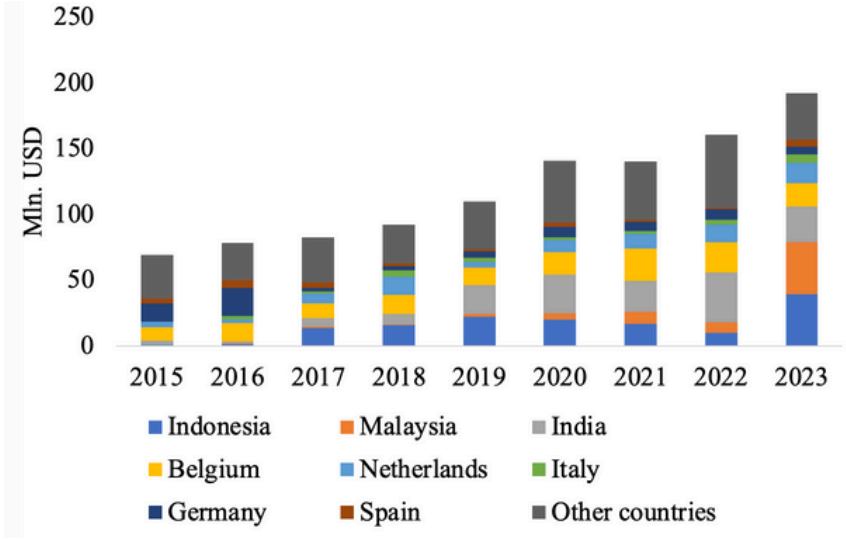

Figure 15. Geographical structure of food exports from DR Congo

Source: ITC Trade Map

1.3. LOCAL AGRICULTURAL SECTOR

Agriculture plays an important role in Congolese economy. However, its share in DRC's GDP has been decreasing gradually over the past two decades, after a period of turbulence in second half of 1990s. The drop in GDP share could be attributed to the recovery of industrial production and mining after the civil war. In 2023, agriculture accounted for 17.4% of the nation's GDP. At the same time, agriculture still employs the majority of the working population, even though this share has been decreasing gradually since early 2000s. As of 2022, 56% of the total working population, have been engaged in agricultural production (Figure 16).

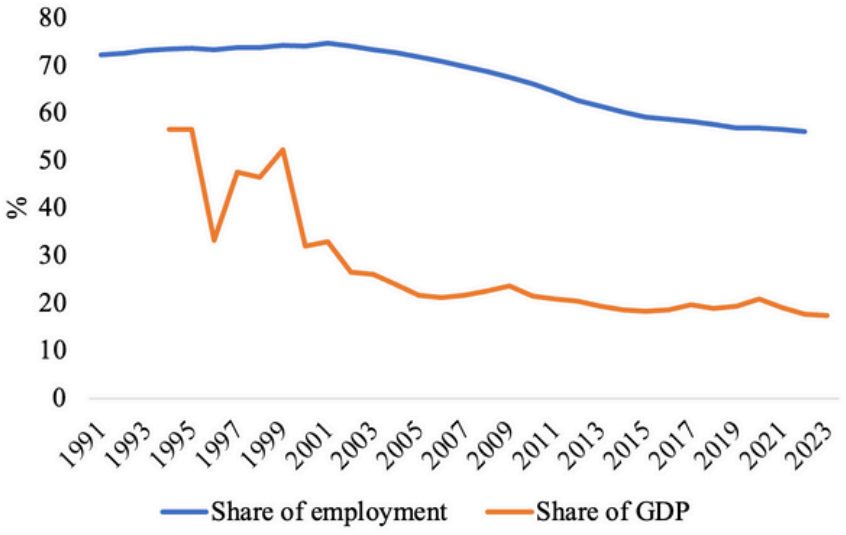

Figure 16. Share of agriculture in GDP and total employment in DRC

Source: World Bank Database

Despite the decreasing share of agriculture in GDP, in monetary terms, it has shown a steady growth over the last two decades. In 2023, monetary value of produced commodities in constant 2015 USD accounted for almost 180% of the 2003 value (Figure 17).

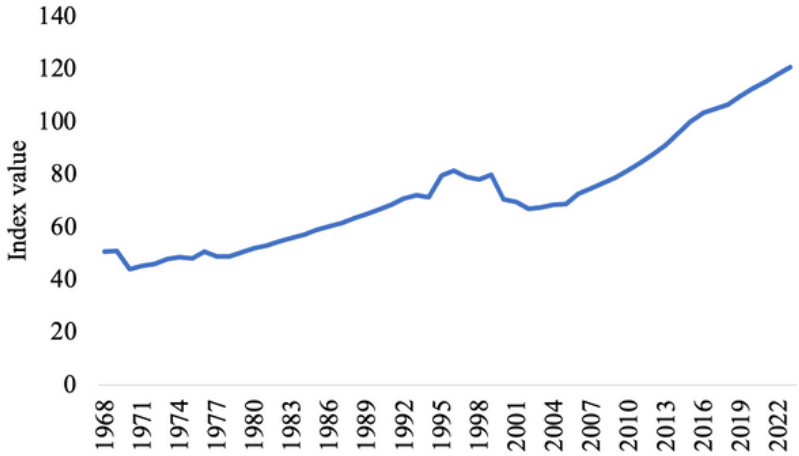

Figure 17. Agricultural production value index, constant 2015 USD. Baseline: 2015

Source: World Bank Database

Crop production

The main crop produced in DRC is cassava, with 48.8 million tons produced in 2022, which makes it a second-largest producer in the world. However, majority of this production is used for the domestic consumption. Second largest crop in terms of production is plantains, 4.9 million tons of which were produced in 2022. It is followed by the two main Congolese cash crops – sugar cane and oil palm, with 2.4 and 2.3 million tons produced in 2022.

Throughout the last two decades commodity structure of the crop production remained relatively unchanged, the same 5 commodities were leading in crop production. High growth rate was observed for cassava, plantains, and rice (Figure 18).

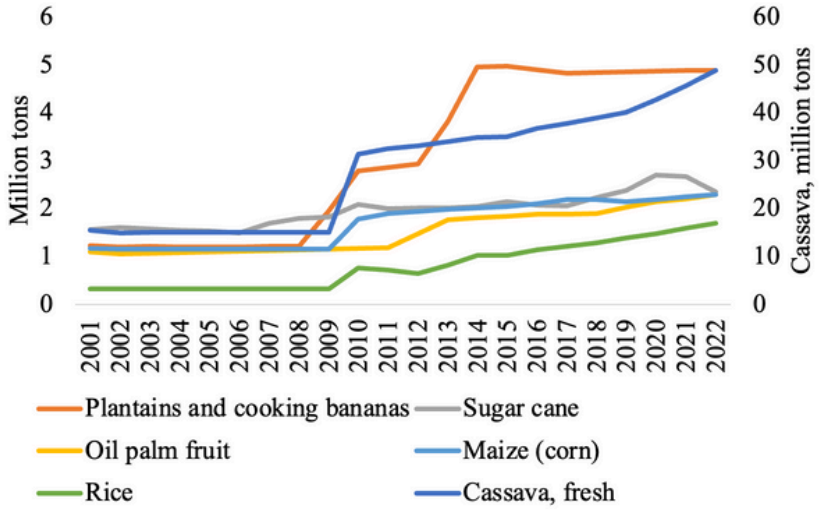

Figure 18. Production amounts of the 5 most-produced crops in DRC, 2001-2022

Source: FAOSTAT

Land use and sown areas

As of 2021, there were 339 thousand square kilometers of agricultural land in DR Congo, which is approx. 15% of the total country's area. Amount of agricultural land remained relatively unchanged until late 2000s. Since 2009 total area used for agricultural purposes increased by almost 90 thousand square kilometers (Figure 19). According to FAOSTAT, as of mid-2010s, only a quarter of this land was an actual cultivated area (arable land and perennial crops).

The areas crop structure is dominated by cassava, in 2022 it accounted for almost 6 million hectares. It is followed by maize, rice, and plantains. As of 2022, harvested areas of these crops were 3.0, 1.9, and 1.1 million hectares, respectively.

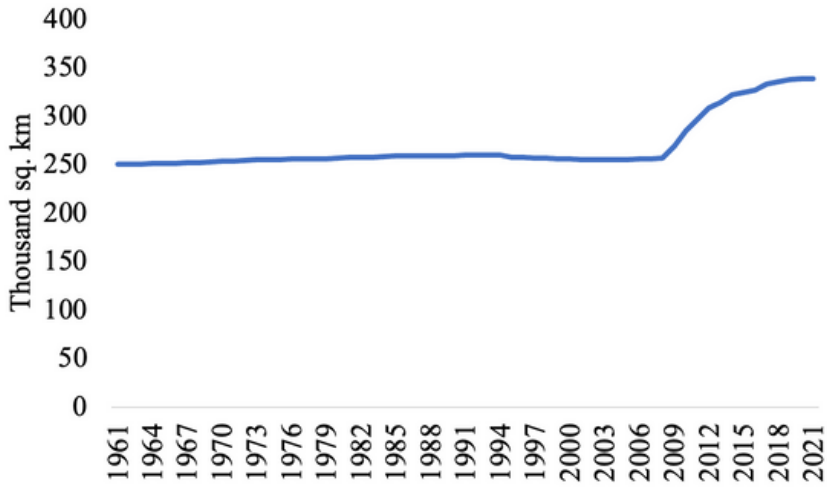

Figure 19. Agricultural land in DRC

Source: World Bank Database

According to FAO's AQUASTAT, as of 2021, approx. 13% of the cultivated land have been equipped for irrigation (10.5 thousand hectares). This area remained unchanged over the past two decades.

Livestock production

Livestock production in DR Congo is relatively small, as compared to the one of crops. Game meat is the most produced livestock commodity in DR Congo. As of 2022, 90 thousand tons of it has been produced. Game meat is followed by other meat varieties, in particular pig, cattle, goat, and chicken.

Over the last two decades, commodity structure of livestock production did not change significantly. Amounts of production of all meats, except for cattle, remained relatively unchanged. For cattle meat, the most pronounced growth was observed over the past 10 year, with a 56% increase in production in 2012-2022 (Figure 20).

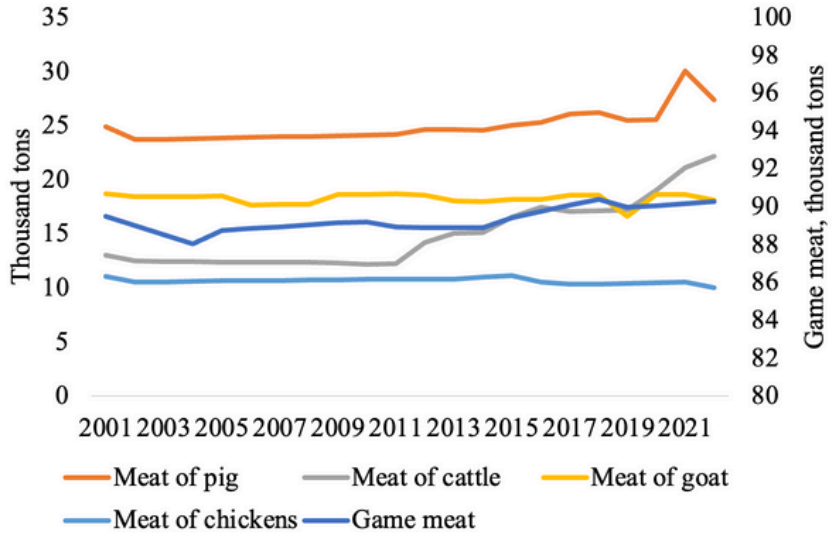

Figure 20. Livestock commodities production in DRC, 2001-2022

Source: FAOSTAT

Chicken is the most widespread animal in Congolese livestock sector, with 18 million heads, as of 2022. It is followed by cattle and goats. Their populations are 1.6, and 4.1 million heads, respectively. Throughout the period of 2001-2022, the populations of pigs, sheep, and goats remained unchanged. At the same time, a steady growth was observed for population of cattle in 2011-2021. Over the last two decades, chicken population have experienced both periods of moderate growth and disease outbreaks, when it has been decreasing rapidly. It caused number of chickens in DRC to drop by approx. 2 million over 2001-2021 (Figure 21).

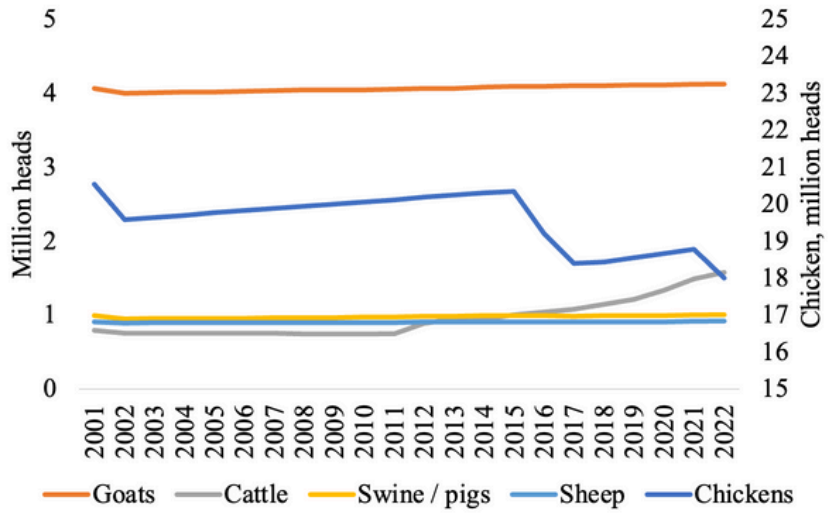

Figure 21. Live animals stock in DRC, 2001-2022

Source: FAOSTAT

Processing sector

According to the World Bank data, as of 2009, value added produced by food, beverages, and tobacco processing sector amounted to 14% of the GDP. Due to lack of data, it is not possible to assess its development over the years.

Two main processed agricultural commodities are sugar and palm oil, as well as their byproducts. As of 2021, 300 and 75 thousand tons of palm oil and palm kernels have been produced, respectively. As of sugar, 103 thousand tons of it have been produced, as well as 35 thousand tons of molasses. Among the beverages, beer of barley is the most produced, with 470 thousand tons, as of 2021 (Figure 22).

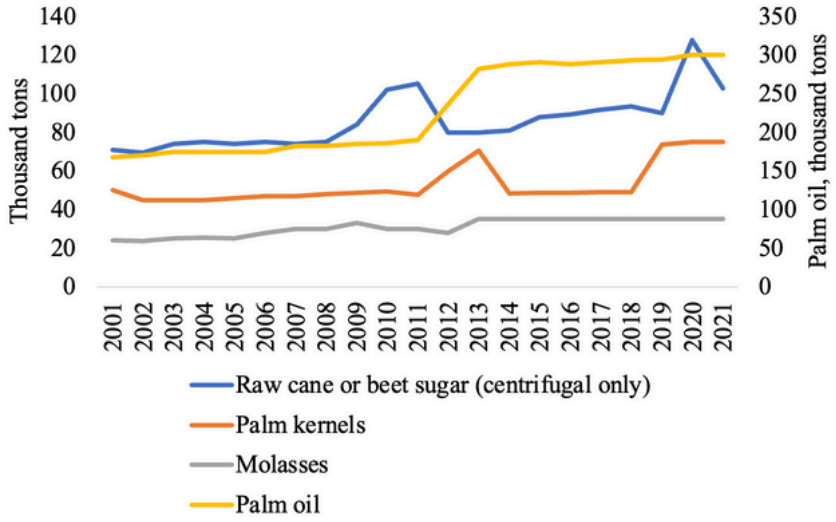

Figure 22. Processed commodities production in DRC, 2001-2021

Source: FAOSTAT

1.4. CHALLENGES IN AGRICULTURE

Land tenure issues

Land tenure insecurity remains a critical challenge for Congolese farmers, as unclear and often overlapping land rights discourage investment in long-term agricultural improvements. Many smallholder farmers do not have secure land titles, making them vulnerable to displacement and reducing their ability to access credit or invest in productivity-enhancing practices (Diao et al., 2023). This insecurity is exacerbated by poor governance and weak legal frameworks, which fail to protect smallholder farmers and perpetuate land conflicts. Additionally, the DRC's complex and inconsistent land tenure system creates uncertainty and limits the development of large-scale agricultural investments (USAID, 2023).

Climate change and variability

Climate change poses a significant threat to agriculture in the DRC, particularly given the country's reliance on rain-fed agricultural systems. The regions of Tanganyika, Kasai, and Kasai Central, where agriculture is highly dependent on rainfall, already experience negative effects from climate variability. Current climate risks include heatwaves, drought, heavy precipitation, and flooding, all of which lead to reduced crop productivity (USAID, 2023). Future climate projections indicate increasing temperatures, more frequent and prolonged heatwaves, variable precipitation patterns, and increased frequency of dry spells and droughts, further stressing crop production and exacerbating food insecurity (USAID, 2023). The impacts are likely to be particularly severe for staple crops such as maize, cassava, and beans, which are sensitive to both heat stress and water availability (USAID, 2023).

Poor infrastructure and lack of market access

The DRC's agricultural sector suffers from a severe lack of infrastructure, which limits access to markets, increases transaction costs, and holds back the overall growth of the sector. Poor roads, lack of storage facilities, and limited access to energy make transport of goods more challenging and increase post-harvest losses. The lack of adequate

infrastructure affects both production and food processing sub-sectors. The DRC has a substantial agrifood trade deficit, with its import-consumption ratio far exceeding its export-output ratio, emphasizing the need for infrastructure improvements to support better market access and reduce dependency on imports (Diao et al., 2023).

Limited access to quality inputs and finance

Access to quality seeds, fertilizers, and modern agricultural equipment is limited in the DRC, especially for smallholder farmers. Financial constraints, high input costs, and a lack of agricultural extension services further exacerbate these challenges. Farmers often rely on traditional farming practices that are less productive and less resilient to climate change (Diao et al., 2023). The lack of access to credit and financial services also restricts farmers' ability to invest in productivity-enhancing technologies or practices. For instance, conservation agriculture, which could mitigate some of the negative impacts of climate change, has low adoption rates due to financial and knowledge barriers (Mwimba & Kalambay, 2021).

Socio-political instability and conflict

The DRC's agrifood system is constrained not only by natural and infrastructural limitations but also by socio-political factors. Instability and conflict have long been persistent challenges in the DRC, negatively impacting agricultural productivity and rural livelihoods. In many regions, ongoing conflicts disrupt farming activities, displace communities, and lead to loss of assets and labor. The instability also limits the government's capacity to provide essential services, including agricultural extension and support (USAID, 2023). The interplay between conflict and agriculture is particularly detrimental in a country where a large proportion of the population relies on subsistence farming for their livelihood. Moreover, limited political will and capacity to address these challenges exacerbate the effects of socio-political instability on agricultural productivity (Arsene & Mwine Fyama, 2021).

1.5. AGRICULTURAL POLICY OVERVIEW

The agriculture sector in the Democratic Republic of Congo is critical, providing employment for approximately the half of the population, predominantly through informal, low-value-added jobs (World Bank, 2021). Rural poverty is pervasive, with approximately 80% of rural inhabitants living below the poverty line. While most of rural population is engaged in agricultural production, low efficiency is the key barrier to overcome poverty, highlighting the urgent need for targeted interventions. Tackling these challenges is vital for fostering economic growth and improving the livelihoods of millions in the DRC. According to World Bank estimates in 2021, raising agricultural incomes and reducing rural poverty in priority provinces of the DRC will require up to USD 2.5 billion in public investments in agricultural productivity over the next 10 to 15 years. Given the socio-economic challenges, these investments represent a substantial amount of financial resources. Effective governance, clear strategic objectives, and well-developed investment plans are essential to attract funding from investors, public financing, and international partners.

The policy framework for the DRC's agricultural sector is established through several strategic documents, including the National Agriculture Investment Plan and the Agri-industrial Recovery Strategy. These documents lay the groundwork for crafting specific agricultural policies designed to boost productivity, ensure food security, and promote national development. Despite this strategic foundation, implementation is frequently hindered by insufficient institutional capacities at both provincial and central levels, leading to ineffective execution of these strategies (World Bank, 2021).

The **National Agricultural Investment Plan (NAIP)** served as the DRC's primary framework for guiding domestic and international investments in the agriculture sector and rural development from 2013 to 2020. It was aimed to address the sector's needs, achievements, and gaps, providing a comprehensive blueprint for its investment and operation. Aligned with the core principles of the **Comprehensive Africa Agriculture Development Programme (CAADP)** and other sectoral policies, integrating into national and regional strategic planning, the NAIP aimed to stimulate the sustained annual agricultural growth exceeding 6%, which is crucial for reducing poverty, ensuring food and nutrition security, and generating sustainable employment and income for the population of the DRC (CAADP, 2013).

The NAIP identified five priority areas and corresponding programs:

- **Promote Sustainable Agricultural Sectors:** Focus on food value chains and agribusiness development to improve incomes for farmers and other sector operators.
- **Improve Food and Nutrition Security Management:** Enhance the management of food security and strategic reserves.
- **Advance Research and Professional Competence:** Develop and disseminate research products and improve the skills of various agricultural actors.
- **Strengthen Agricultural Governance and Capacity:** Promote gender integration, good governance, and the overall strengthening of human and institutional capacities in the sector.
- **Reduce Climate Change Vulnerability:** Mitigate the agriculture sector's vulnerability to climate change (Ministère de l'Agriculture et du Développement Rural, 2013).

The strategic approach for implementing the NAIP revolves around several core principles. It centers on stakeholder inclusion and accountability, leveraging provincial advantages, establishing enterprise centers, integrating gender and governance considerations, enhancing stakeholder capacity, and focusing on sustainable agricultural productivity while adhering to environmental and social constraints.

To support these comprehensive guidelines, the NAIP was structured into 18 programs with 66 sub-components of activity, with total estimated cost for implementing at nearly USD 6 billion.

Credit flows to agriculture in DR Congo remain relatively low over the last decades, reflecting depressed conditions for attracting external financing for the sector. The statistics for credit to agriculture in DR Congo from 2005 to 2021 reveal several key trends and significant fluctuations in the sector's financial landscape.

From 2005 to 2007, agricultural credit increased from 31.9 million to USD 49.3 million, indicating initial growth. However, this was followed by a sharp decline to USD 15.3 million in 2009, demonstrating early volatility. The period closed with a modest recovery, reaching USD 20.7 million in 2011. A significant recovery occurred in 2012, with credit jumping to USD 57.7 million. The peak investment years were 2015 and 2016, with credits of USD 53.2 million and USD 70.6 million respectively, reflecting strong investment in the agricultural sector.

From 2017, the credit levels stabilized around USD 43 million but declined to USD 30.6 million in 2019 and further to USD 29.1 million in 2020, reflecting challenges in the public finance due to economic downturns. Yet, after an outbreak of global COVID-19 pandemic, there was a notable recovery in 2021, with credit increasing to USD 47.2 million, indicating renewed interest or improved conditions for agricultural financing.

The overall trend from 2005 to 2021 shows periods of growth, peak investment, stabilization, and decline. The recovery in 2021 is a positive sign, but consistent efforts are needed to ensure stable and adequate funding for agriculture, crucial for food security and economic development in DR Congo (Figure 23).

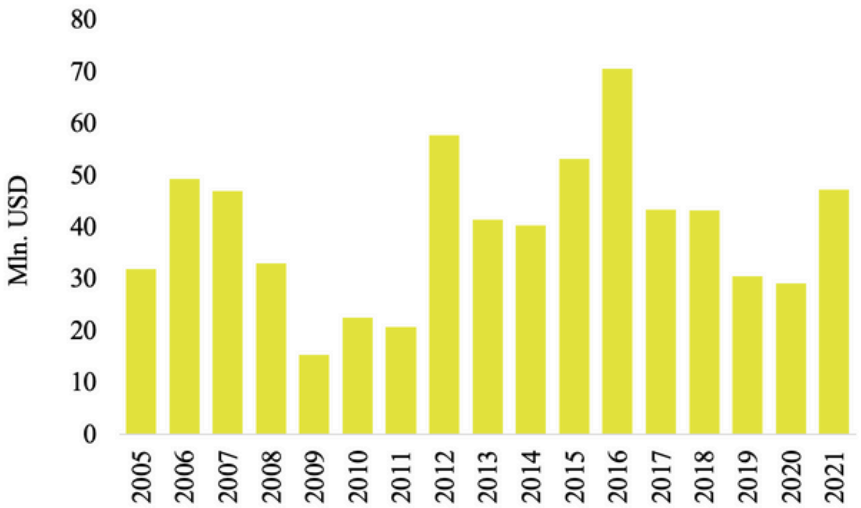

Figure 23. Credit to agriculture

Source: FAOSTAT

When observing central government expenditures on agriculture in DR Congo from 2010 to 2022, the country experienced both substantial investment and notable declines. Key trends indicate cycles of intense support followed by dramatic reductions, highlighting a lack of a sustainable approach to financing agricultural development (Figure 24).

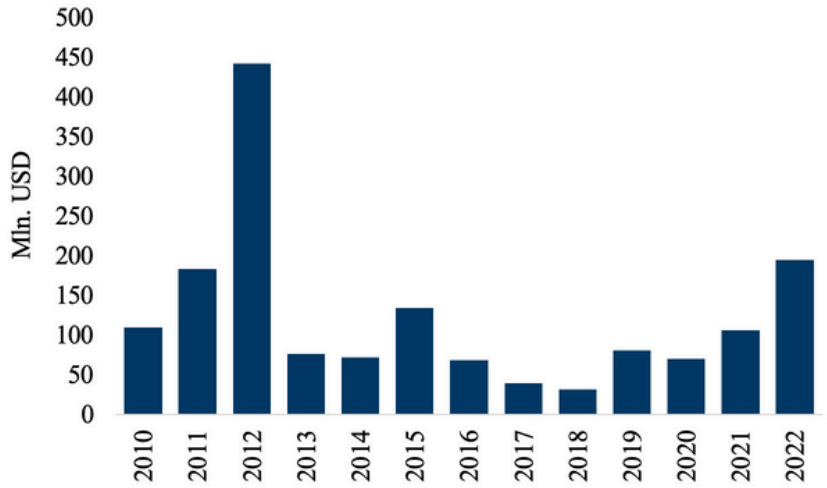

Figure 24. Central government expenditures to agriculture

Source: FAOSTAT data

The central government expenditures on agriculture in DR Congo from 2010 to 2022 reflect a pattern of early substantial investment, subsequent volatility and decline, and eventual recovery. This contrasts with the trends observed in agricultural credit, which also showed periods of growth and decline but with different timing and magnitude. This highlights the complex interplay between public investment and financial sector support for agriculture, where the government tends to increase investment in the sector when private financing shrinks.

The development flows to agriculture in DR Congo from 2000 to 2021 exhibit notable fluctuations, reflecting varied levels of donor and international partner support. These trends underscore the importance of development flows given the limited public finance and credit resources available.

In the early 2000s, development flows were relatively modest, averaging around USD 10 million annually. However, from 2005 to 2010, there was a significant upward trend, with flows increasing to an average of approximately USD 30 million, peaking at USD 67 million in 2006. This period marked a growing international interest in supporting the agricultural sector (Figure 25).

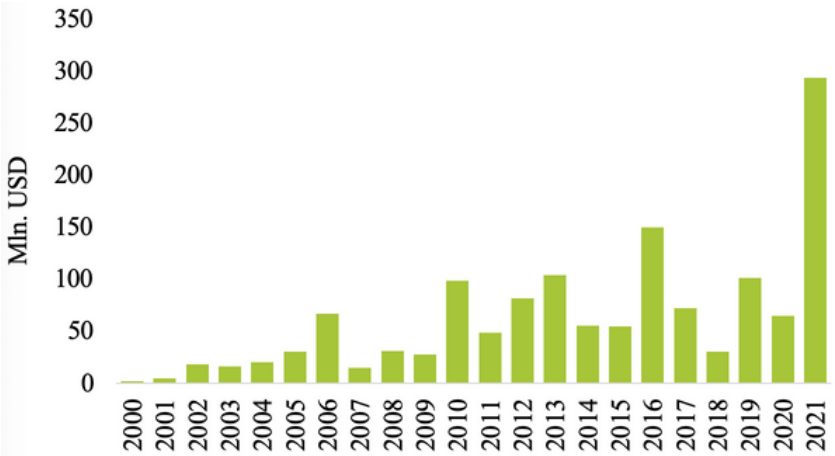

Figure 25. Development flows to agriculture

Source: FAOSTAT data

The pattern of development flows reveals periods of significant surges and declines, with a notable recovery in recent years. This highlights the essential role of international support in supplementing limited public finance and credit resources, crucial for fostering agricultural development in DR Congo. The increased investment in 2021 demonstrates the potential impact of sustained financial support on the sector's growth and stability.

One of the most significant recent projects for donor support in the agricultural sector of the DRC is the World Bank's National Agriculture Development Program Project, launched in 2021. This ambitious initiative seeks to address critical challenges faced by the country's agricultural sector, particularly focusing on smallholder farmers who constitute the backbone of the rural economy. The overarching goal of the project is to improve agricultural production, food security, and farmer incomes. This is to be achieved by enhancing access to essential agricultural inputs, improving the availability and quality of services, and facilitating better market access for smallholder farmers. By targeting these key areas, the project aims to develop the agricultural sector and increase its capability of sustaining crisis to improve the livelihoods of local citizens.

Key components of the project include the following core components:

1. **Agricultural Productivity Enhancement:** Providing smallholder farmers with improved seeds, fertilizers, and farming techniques to boost crop yields.
2. **Market Access Improvement:** Improving rural infrastructure, such as roads and storage facilities, to help farmers access markets more efficiently and reduce post-harvest losses.
3. **Institutional Strengthening and Capacity Building:** Enhancing the capacity of public institutions and organizations involved in agriculture to provide better services and support to farmers (World Bank, 2021).

The total planned cost for the project which is expected to last for 5 years is approximately USD 520 million, with financing provided by the International Development Association (IDA).

In terms of the trade policy in agriculture, the DRC has been a World Trade Organization (WTO) member since 1997. Import duties typically include a 5% rate for most agricultural and veterinary supplies and a 10% rate for consumed food items, with some specific goods subject to over 20% tariffs. However, in May 2022, the DRC, along with other East African Community (EAC) countries, agreed to raise the minimum tariff on several agricultural products from 25% to 35%. These higher common external tariffs now apply to a number of food products, including dairy and meat products, cereals, edible oils, beverages, spirits, fruits, nuts, sugar, confectionery products, cotton, fresh-cut flowers, coffee, tea, and spices (Snyder & Kimitei, 2022). To encourage investment and boost productivity growth, some agricultural equipment is exempt from import duties.

1.6. DR CONGO: SUMMARY

The Democratic Republic of the Congo, with its population exceeding 100 million people as of 2022, is the most populous country in Central Africa and the fourth-most populous in Africa. Over the past two decades, the population has nearly doubled, largely driven by high birth rates and improvements in medical care. By 2050, the DRC is expected to be among the world's ten most populous countries. Despite gradual economic growth, the country's GDP per capita remains significantly lower than that of neighbouring Angola and Cameroon. The country faces major economic challenges, including political instability, military conflicts, weak institutions, and a low level of industrialization.

Food insecurity has increased alongside population growth. Since 2000, the proportion of the population facing food insecurity has risen from 28% to 35%, resulting in a doubling of the number of undernourished people, now totalling 24 million in 2022. The average dietary energy supply adequacy has also decreased slightly, from 103% to 99%, highlighting a drop in food availability. A high dependence on cereals, roots, and tubers, which make up 79% of dietary energy, further exacerbates malnutrition in the country. Protein intake, particularly from animal sources, is significantly lower than the regional average.

The DRC's agricultural sector, while critical to the economy, has seen a decline in its contribution to GDP, accounting for 17% in 2023. Despite this, agriculture employs the majority of the working population, with 56% engaged in farming. Cassava is the DRC's primary crop, making the country the second-largest cassava producer globally, with 48.8 million tons produced in 2022, mainly for domestic consumption. Other key crops include plantains, sugar cane, and oil palm. Agricultural production has grown steadily in monetary terms, reaching 180% of its 2003 value by 2023.

Challenges in the agricultural sector include land tenure insecurity, inadequate infrastructure, and limited access to inputs like seeds and fertilizers. Climate change also poses a significant threat, with increased temperatures, irregular rainfall, and frequent droughts affecting crop yields, particularly in regions reliant on rain-fed agriculture. The agricultural policy framework, anchored in the National Agricultural Investment Plan (NAIP), aims to address these challenges by promoting sustainable agricultural sectors, improving food security management, and enhancing agricultural governance. However, implementation remains hindered by weak institutions and governance issues.

2. ANGOLA

2.1. FOOD SECURITY

Angola is one of the most fast-growing countries on the African continent. Over the last two decades, its population more than doubled, reaching 36 mln. people in 2022 (Figure 26).

Figure 26. Total population in Angola

Source: World Bank

Economy of Angola experienced substantial fluctuation over this period. Given that the country is a large oil exporter, it benefited from high oil prices in early 2010-s. Afterwards, easing of global oil prices led to the reduction of GDP per capita; nevertheless, it remains at higher level compared to neighboring DR Congo and Cameroon (Figure 27).

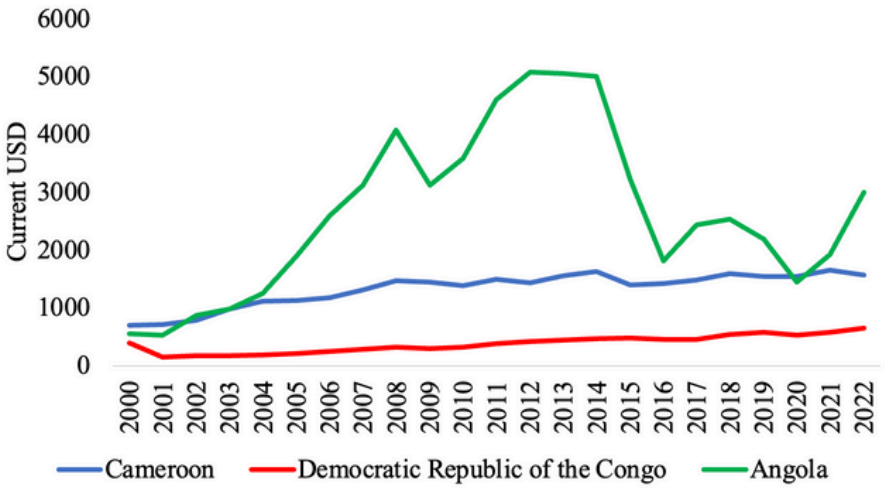

Figure 27. GDP per capita in Angola

Source: World Bank

The economic growth decreased the level of undernourishment in almost three times: from 64 to 22% (Figure 28).

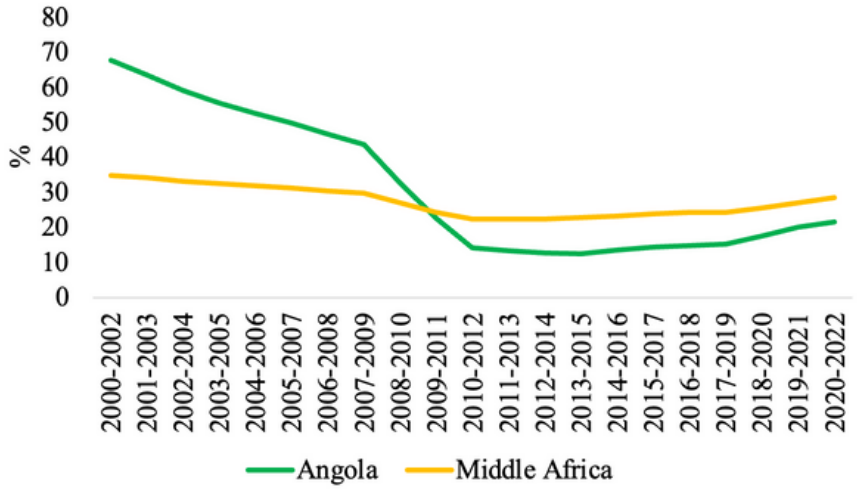

Figure 28. Prevalence of undernourishment in Angola

Source: FAOSTAT

The number of undernourished persons decreased from 11 to 7.4 mln. persons; this tendency contrasted with the general trend in the region (Figure 29).

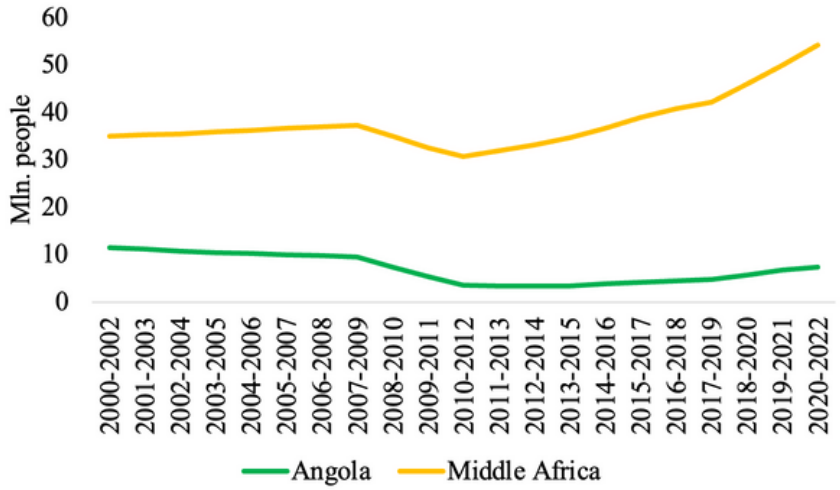

Figure 29. The number of undernourished persons in Angola

Source: FAOSTAT

The average dietary energy supply adequacy in Angola was lower than on average in the region in 2000. However, it increased up to 114% in 2022, which is 10% higher the regional average (Figure 30).

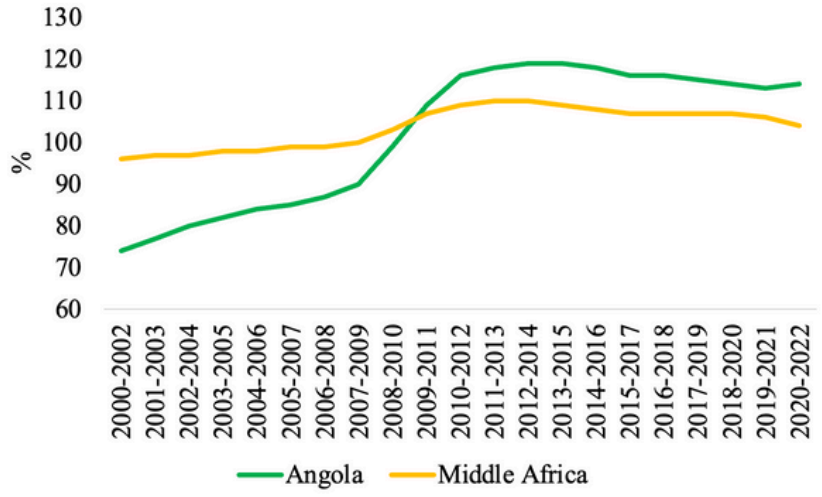

Figure 30. Average dietary energy supply adequacy in Angola

Source: FAOSTAT

The growing incomes of population positively affect the diversity of diet. Therefore, in 2022, the share of calories intake derived from cereals, roots and tubers was 62% compared to 69% on average in the region (Figure 31).

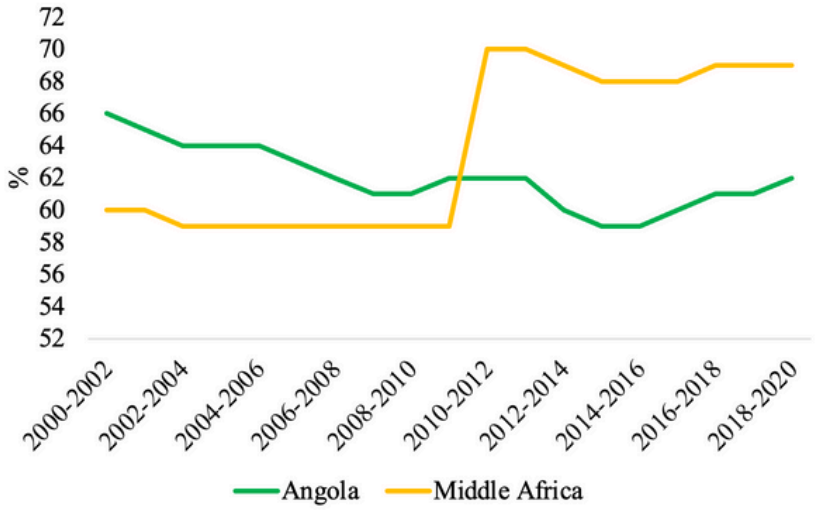

Figure 31. Share of dietary energy supply derived from cereals, roots and tubers in Angola

Source: FAOSTAT

The average protein supply increased from 40 to 49 grams/person/day, which is slightly above than the average in the region (Figure 32). Nevertheless, the average intake of animal protein remained relatively stable (Figure 33).

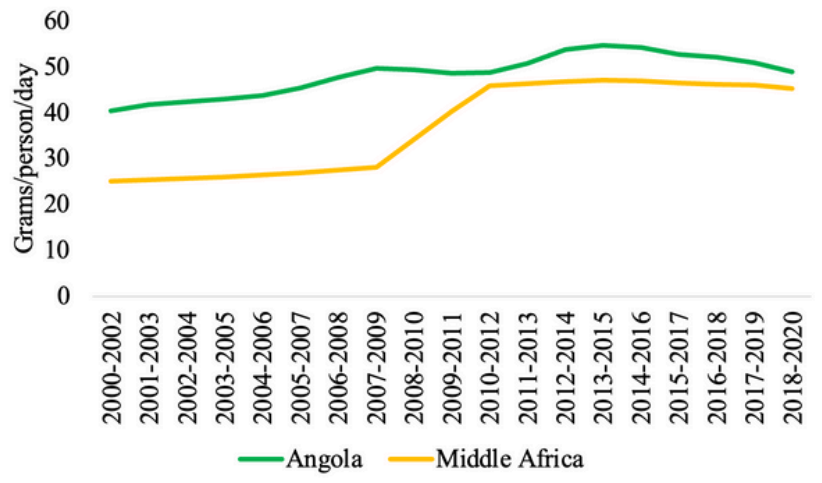

Figure 32. Average protein supply in Angola

Source: FAOSTAT

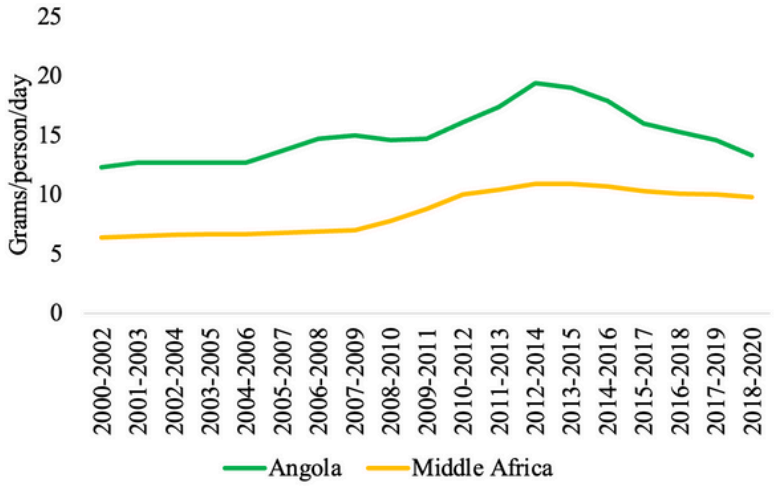

Figure 33. Average animal protein supply in Angola

Source: FAOSTAT

The per capita food supply variability in Angola was much higher than on average in the region. The strong economic growth cycle in 2010-s increased the variability of calories intake due to income growth and shifts of consumption patterns (Figure 34).

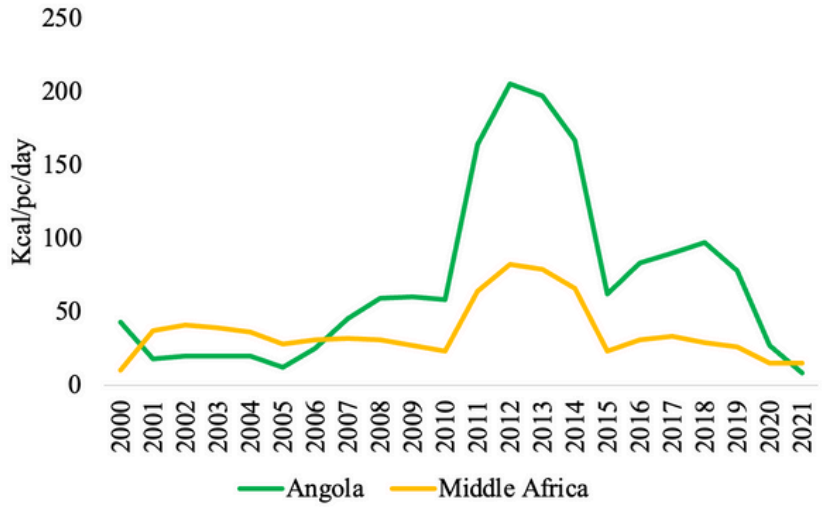

Figure 34. Per capita food supply variability in Angola

Source: FAOSTAT

As Figure 35 shows, the cereal import dependency ratio in Angola is much higher than the average in the region (43% versus 29% in 2022). Such dependency reflects the strong food demand based on improved incomes of population.

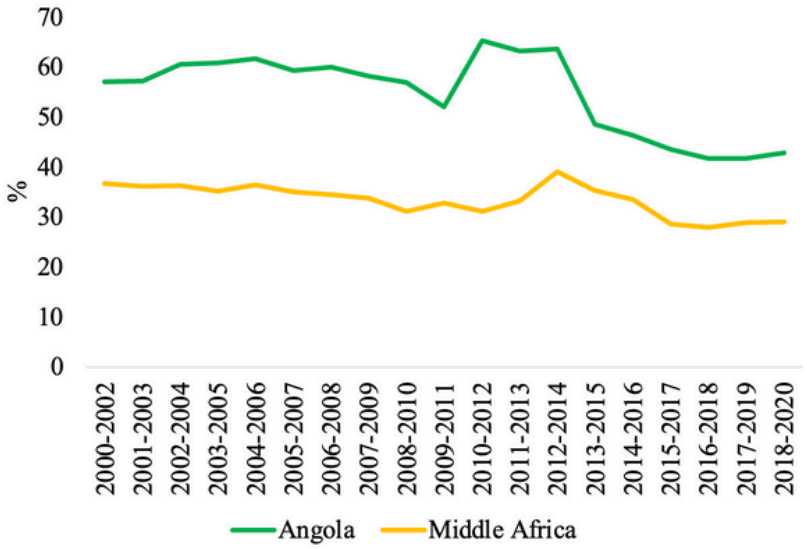

Figure 35. Cereal import dependency ratio in Angola

Source: FAOSTAT

2.2. AGRI-FOOD TRADE

Angolan food imports have been quite volatile over the past decade, ranging from 1.5 to 4 billion USD in value. The main import category is meat, cereals, and oilseeds (Figure 36). Since 2018, a pronounced growth of cereals and oilseeds import is observed.

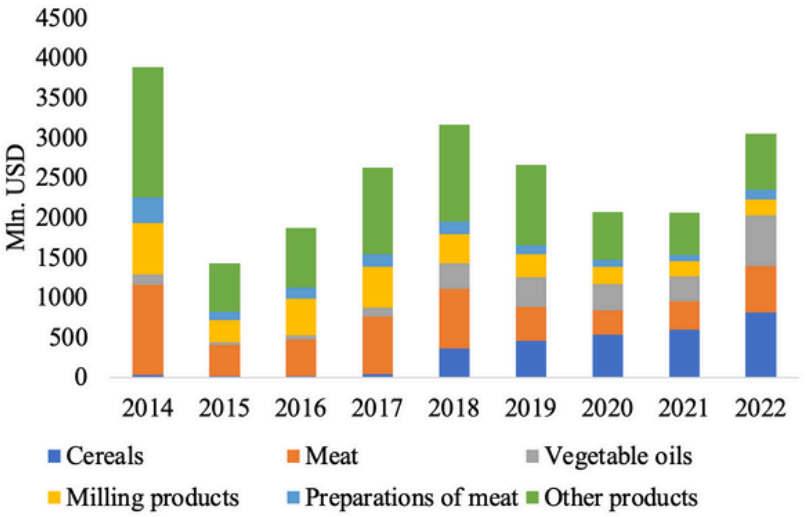

Figure 36. Product structure of food import to Angola

Source: ITC Trade Map

The geographical structure of import is quite diversified. The main food importers to Angola are Brazil, Portugal, and India. Over the past decade, the share of Portugal has been decreasing, while presence of India and Malaysia expanded significantly (Figure 37)

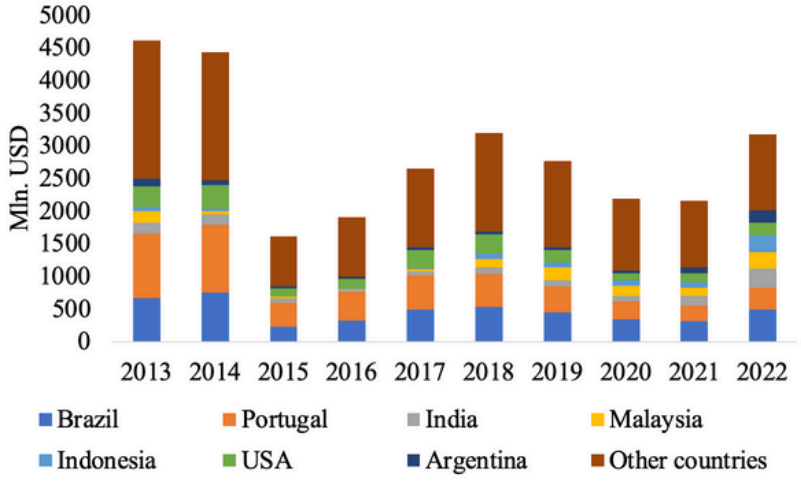

Figure 37. Geographical structure of food import to Angola

Source: ITC Trade Map

Ukraine's share in Angolan food imports is relatively small. There is no dominant product that is imported from Ukraine, due to significant year-to-year changes (Figure 38).

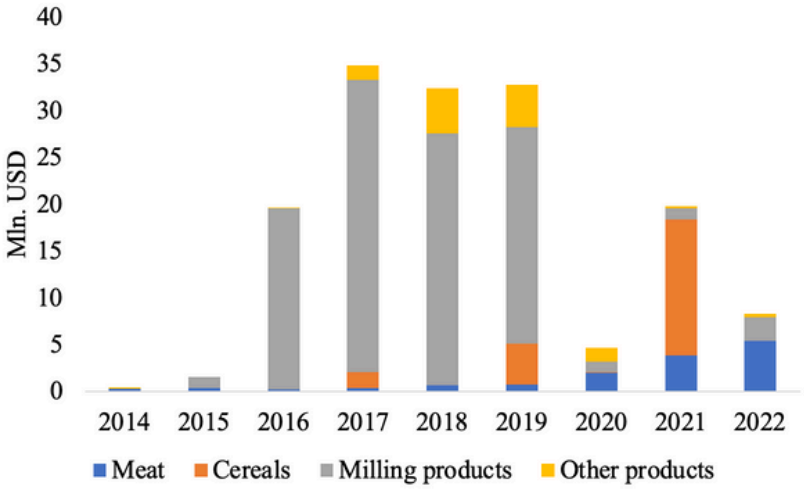

Figure 38. Food import from Ukraine to Angola

Source: ITC Trade Map

Food exports from Angola have been gradually decreasing since 2016. The primary export category is fish and crustaceans (Figure 39).

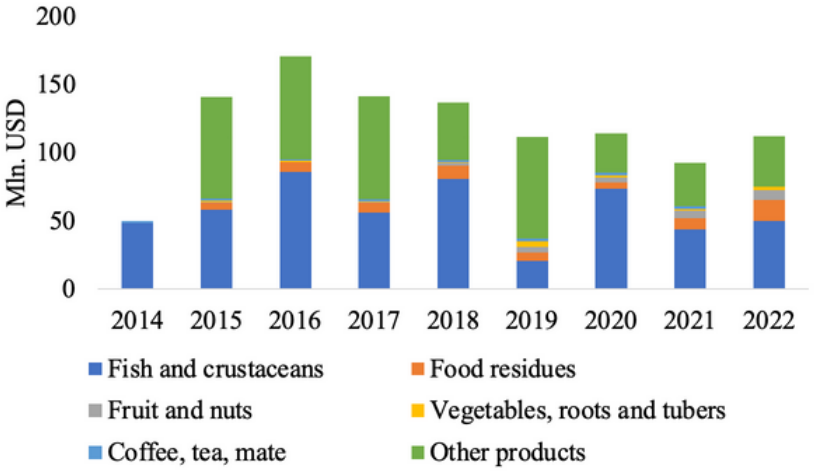

Figure 39. Product structure of food export from Angola

Source: ITC Trade Map

The primary destination of Angolan food exports is DR Congo. Until 2020, it accounted for more more than 75% of the Angolan exports. However, this share decreased in 2020-2022 (Figure 40)

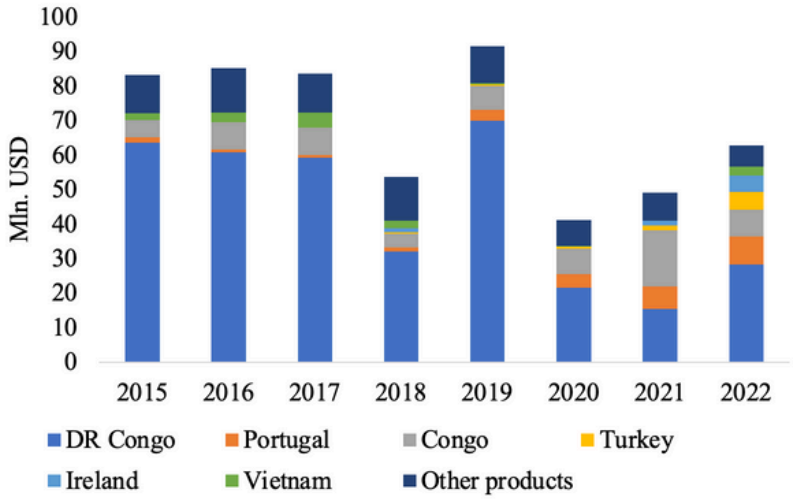

Figure 40. Geographical structure of food exports from Angola

Source: ITC Trade Map

2.3. LOCAL AGRICULTURAL SECTOR

Agriculture plays an important role in Angolan economy. It's share in Angola's GDP has been slowly increasing since mid-2000s, reaching 15% in 2023. Share of working population, engaged in agricultural production, also have been growing steadily since mid-2000s. It increased from 36% in 2002 up to 56% in 2022 (Figure 41).

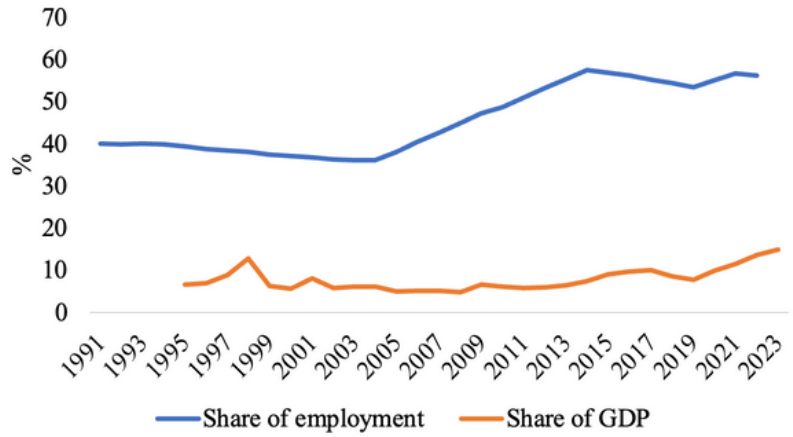

Figure 41. Share of agriculture in GDP and total employment in Angola

Source: World Bank database

Over the past two decades, value of Angolan agricultural production has been steadily growing, except for the second half of 2010s, when a slight roll back happened. It was caused primarily by the cuts in governmental agriculture support in 2014 and a massive drought in 2016. Despite that, in 2023, monetary value of produced commodities in constant 2015 USD accounted for approx. 340% of the 2003 value (Figure 42).

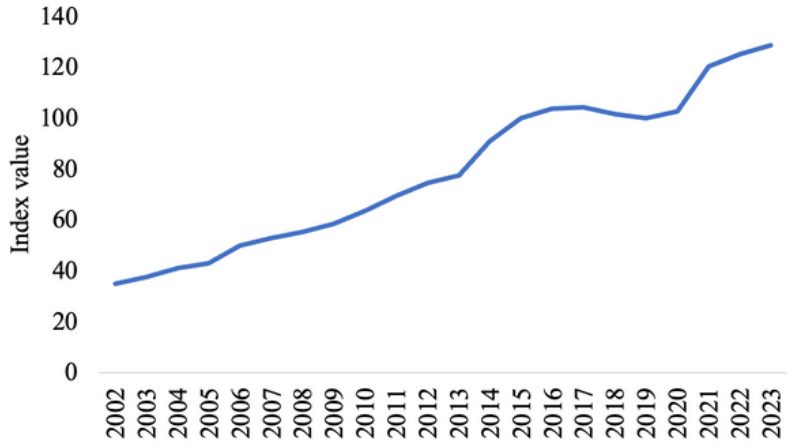

Figure 42. Agricultural production value index, constant 2015 USD. Baseline: 2015

Source: World Bank database

Crop production

Main crop produced in Angola is cassava, with 10.6 million tons produced in 2022. It is followed by bananas, maize, and sweet potatoes, 4.6, 3.1, and 1.9 million tons of which have been produced in 2022, respectively. Another important cash crop in Angola is sugar cane.

Throughout the last two decades, the structure of crop production remained relatively unchanged, the same 5 commodities were leading in crop production. High growth rate was observed for maize and bananas. As it is seen from the data, the 2012 drought have affected production of cassava, maize, and sweet potatoes. Production of cassava have also sharply dropped in 2014, and returned to moderate growth trend since 2015 (Figure 43).

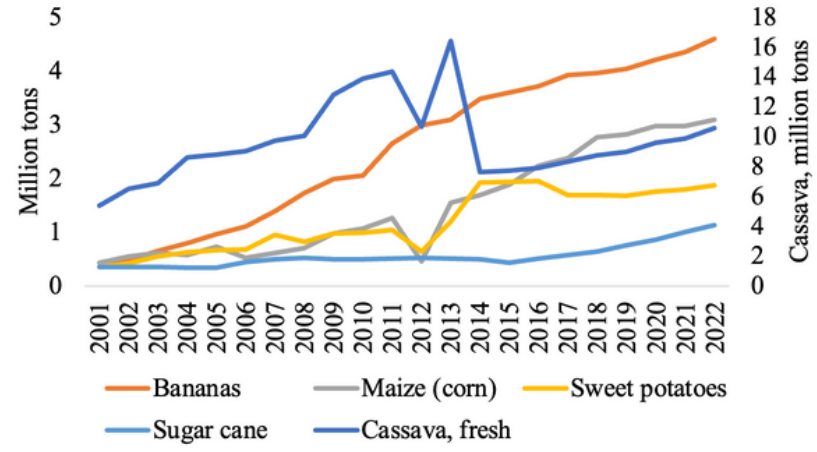

Figure 43. Production amounts of the 5 most-produced crops in Angola, 2001-2022

Source: FAOSTAT

Land use and sown areas

As of 2021, there were 459 thousand square kilometers of agricultural land in Angola, which is approx. 37% of the total country's area. Amount of agricultural land remained relatively stable through 1691-2021 (Figure 44). The crop structure is dominated by maize, in 2022 it accounted for almost 2.8 million hectares. It is followed by cassava. As of 2022, harvested area of it was 1.0 million hectares.

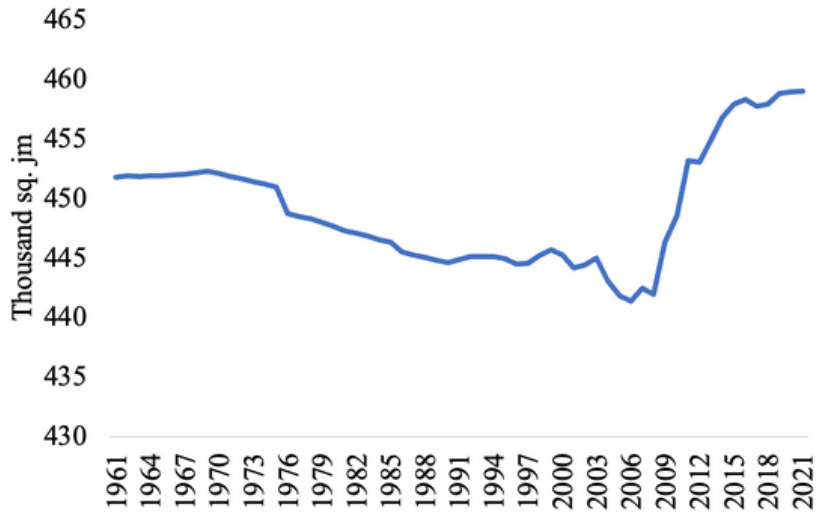

Figure 44. Agricultural land in Angola

Source: World Bank Database

According to FAO's AQUASTAT, as of 2021, approx. 40% of the cultivated land have been equipped for irrigation (3.2 million hectares) This area remained unchanged over the past two decades.

Livestock production

Milk of cattle is the most produced livestock commodity in Angola. As of 2022, 224 thousand tons of it has been produced. Milk is followed by meat, in particular pig, cattle, and chicken. Another commonly produced livestock commodity is chicken eggs, with 143 thousand tons of them produced in 2022. Over the last two decades, a rapid growth of production of both chicken meat and eggs has happened. In 2022, their production amounts were 7.3 and 17.6 times higher, as compared to 2002. A significant increase in production of port has been observed as well. The only sub-sector of livestock production that remained relatively stagnant is cattle (Figure 45).

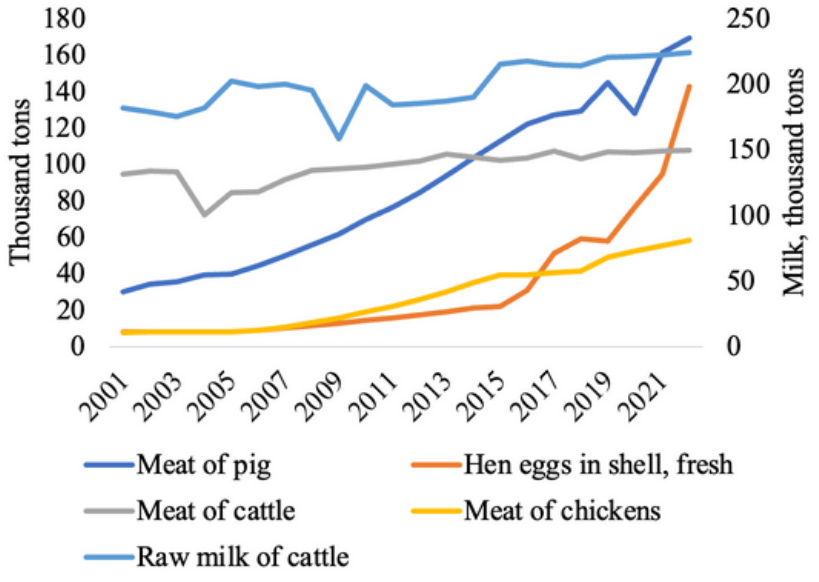

Figure 45. Livestock commodities production in Angola, 2001-2022

Source: FAOSTAT

Live animals stock data reflects the production statistics with the exponential growth of chicken population. Over the last two decades, number of them increased from 6.9 to 46.5 million. Another fast-growing animal population in Angola is the one of pigs, with a 275% growth over the same period. Populations of cattle and goats have also been growing, but at a more moderate pace. For all animals a slowdown in population growth is observed in 2014 and several following years. It reflects the economic crisis and the following cuts in state support of agriculture (Figure 46).

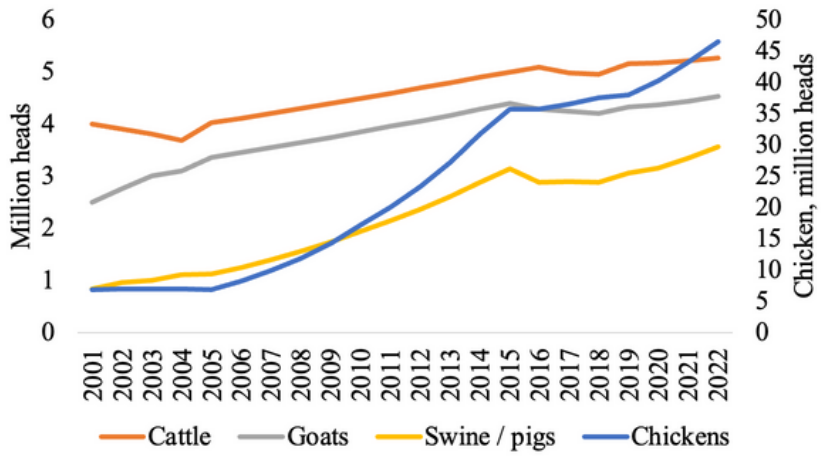

Figure 46. Live animals stock in Angola, 2001-2022

Source: FAOSTAT

Processing sector

Due to lack of data, it is not possible to assess the size of Angolan food processing sector relative to the GDP and the dynamics of its development. Two main processed agricultural commodities in Angola are sugar and palm oil, as well as their byproducts. Since 2015, production of both sugar and molasses started to increase rapidly, with a approx. 3 times increase over 2015-2021. Another commodity, for which a rapid growth has been observed over the past two decades is groundnut oil. 30 thousand tons of it has been produced in 2021, which is approximately 940% of the 2001 value. Among the beverages, beer of barley is the most produced, with an amount of 1.1 million tons, as of 2021 (Figure 47).

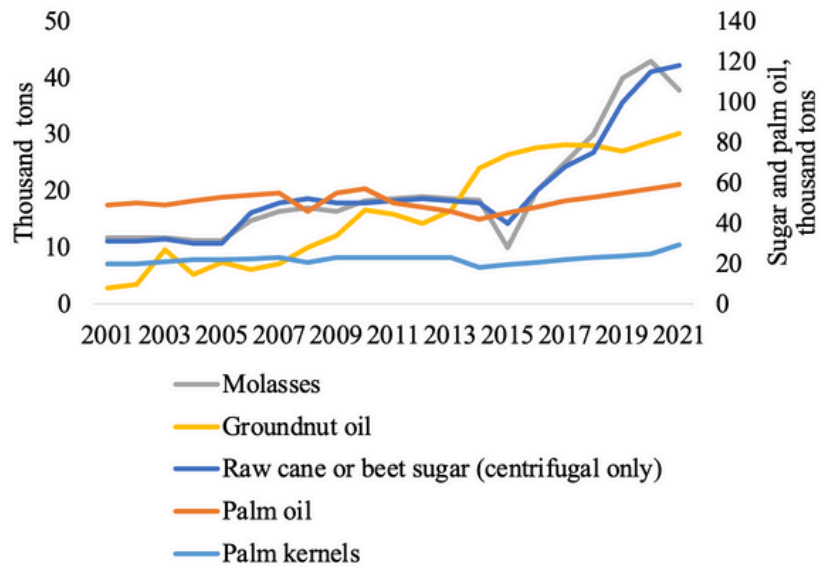

Figure 47. Processed commodities production in Tanzania, 2001-2021

Source: FAOSTAT

2.4. CHALLENGES IN AGRICULTURE

Climate change and variability

Climate change poses a severe threat to Angola's agriculture, particularly in regions dependent on rain-fed systems. Increased temperatures, erratic rainfall, and extreme weather events, such as prolonged droughts, have caused substantial damage to crops and livestock. For instance, climate-related disasters between 2005 and 2017 resulted in USD 1.2 billion in damages and affected over 3.8 million people in southern Angola (Correia et al., 2024). Projections suggest a potential reduction in agricultural productivity by up to 7% by 2050 due to these climatic changes (Correia et al., 2024). The intensification of land use, a necessary adaptation to these changes, also risks exacerbating land degradation if not managed sustainably (Binswanger-Mkhize, 2008).

Inadequate infrastructure and lack of market access

The lack of infrastructure is a critical barrier to agricultural productivity in Angola. Rural areas suffer from poorly maintained roads, insufficient irrigation systems, and inadequate storage facilities. These challenges limit farmers' access to markets and make the transport of goods difficult and expensive. Investments in public agricultural services have been minimal; for example, the entire budget for the Rural Extension Program in 2009 was only USD 30 million, with only 10% accessible to the program (Ovadia, 2018). As highlighted in the literature, one of the major issues is that infrastructural and technological deficits limit the ability of Angolan farmers to compete effectively and adapt to modern agricultural techniques, further affecting productivity and sustainability (Binswanger-Mkhize, 2008).

Limited access to finance and inefficient policies

Access to financial resources and quality agricultural inputs like seeds, fertilizers, and modern equipment is severely limited for Angolan farmers, particularly smallholders. The financial sector's underdevelopment in rural areas, combined with high costs of agricultural loans, hinders investment in productivity-enhancing technologies. Furthermore, government programs are often ineffective due to bureaucratic inefficiencies, corruption, and misallocation of resources (Ovadia, 2018). The lack of investment in agricultural science and education also contributes to the technology divide in Angola, preventing farmers from adopting new, more efficient farming practices (Binswanger-Mkhize, 2008). Besides that, Angolan agriculture policies in general have often been characterized by a top-down approach that does not adequately address the needs of smallholder farmers. For instance, the Aldeia Nova project, intended to aid ex-combatant families through agricultural development, faced significant criticism due to its high costs, lack of transparency, and minimal impact relative to the amount spent (Kimhi, 2010).

2.5. AGRICULTURAL POLICY OVERVIEW

Given Angola's relatively low level of economic development, its high poverty rates (32% nationwide and about 54% in rural areas, according to World Bank (2020), and its significant reliance on food imports, the country's main strategic initiatives are focused on addressing these critical issues (Ministério do Planeamento, 2007). Unemployment is also a major challenge, standing at 30% overall and 38% in rural areas, where most workers are informally employed, particularly in the non-oil sector (African Development Bank, 2024). While Angola's economy and budget rely heavily on the oil and gas sector, agriculture remains underdeveloped and marked by low productivity. As a result, developing the agricultural sector has become a key component of Angola's development strategy in recent decades. By boosting agriculture, Angola aims to diversify its economy, reduce poverty – especially in rural areas where most people are engaged in farming – and decrease its dependence on imported food.

Recent key strategic documents guiding Angola's development include the **Angola Vision 2050** and the **National Development Plan (NDP) 2023-2027**, both of which outline the country's long-term goals (African Development Bank, 2023). While Vision 2050 focuses on enhancing the quality of life for citizens and reducing the country's dependence on oil by diversifying the economy, it also emphasizes the importance of achieving food sovereignty. In tandem with this, the NDP serves as a medium-term blueprint, prioritizing socioeconomic and territorial development. Both strategies have a focus on agriculture which is to become a key in driving national growth and self-sufficiency. In line with the NDP 2023-2027, the Government of Angola has also developed two plans for the agricultural development: the N**ational Grain Plan (PLANAGRÃO)** and the **National Plan for the Promotion and Development of Livestock (PLANAPECUÁRIA).**

PLANAGRÃO is a national plan designed to enhance the large-scale production of grains and address the challenges associated with inconsistent international supplies of grains and fertilizers. The plan's primary goals are to boost the viability and competitiveness of commercial farms, advance the development of the food chain, and promote the efficient use of natural resources within a low-carbon economy. The initiative is committed to improving agricultural productivity while also focusing on the restoration and preservation of ecosystems. By reducing dependency on imported crops – such as wheat, rice, soybeans, and corn – PLANAGRÃO aims to strengthen national food security. In addition to its agricultural and environmental objectives, PLANAGRÃO is dedicated to fostering economic growth in rural areas and reducing poverty. Through these combined efforts, the plan seeks to create a more resilient and self-sufficient food production system, contributing to both economic stability and sustainability in the long term.

The PLANAGRÃO budget is estimated at approximately **USD 5.7 billion** over the 5-year period, with funding to be allocated to the development of agricultural infrastructure through government expenditures and supporting private initiatives via credit mechanisms. As a result of the plan's initiatives, agricultural contributions to the economy are projected to rise from 8.6% in 2022 to 10.3% by 2027. This growth is driven by a significant expansion in crop production, which is expected to more than double, reflecting the plan's impact on enhancing agricultural productivity and economic development (Government of Angola, 2023).

PLANAPECUÁRIA is an initiative designed to significantly enhance domestic livestock production in Angola, focusing particularly on eggs and poultry meat (Presidência da República, 2023).To achieve its objectives, the plan is supported by a substantial budget exceeding USD 300 million, allocated over the period from 2024 to 2026. This funding will facilitate the development of key areas such as private investment in the livestock sector and the establishment of a comprehensive system for the surveillance, prevention, and control of animal diseases (Governmen of Angola, 2023). By addressing these critical aspects, PLANAPECUÁRIA aims to reduce the country's dependence on meat imports. In line with this goal, the plan is expected to drive a remarkable increase in poultry production, with output projected to grow nearly sevenfold to over 244 thousand tons annually. This substantial rise in production will not only enhance food security but also support the broader objectives of the plan to boost local agriculture and reduce import reliance.

Angola has implemented **high import tariffs on most food products,** with rates exceeding 20%, a policy substantially reinforced in 2019 to stimulate domestic production (Dias & Woody, 2023). Despite this, the country remains heavily dependent on food imports. Tariffs on flour and flour-based products are particularly steep, reaching 50%, while meat products face a 30% tariff. Additionally, rice, vegetable oils, and milk products are subject to a 20% tariff. These high tariffs reflect the government's strategic efforts to reduce import reliance and promote local agriculture, though the results have yet to significantly alleviate the country's dependency on imported food.

Central government expenditures on agriculture in Angola from 2001 to 2022 reveal significant fluctuations in the policy. Beginning at USD 35 million in 2001, spending saw a steady increase, reaching USD 390 million by 2007. This early period of growth highlights a strong governmental commitment to enhancing agricultural support. However, this trend was followed by substantial volatility, with expenditures peaking at USD 573 million in 2008 before sharply declining to USD 184 million in 2009 with the global financial crisis.

In the aftermath of the crisis, government spending on agriculture initially rose to USD 608 million in 2013, reflecting a renewed commitment to the sector. However, this support sharply declined to USD 98 million by 2020, highlighting significant fiscal challenges and strategic shifts during the COVID-19 crisis. This dramatic reduction underscores the difficulties of sustaining long-term investment in agriculture amidst economic pressures. Despite these challenges, there has been a partial recovery in recent years. Expenditures increased to USD 150 million in 2021 and further to USD 268 million in 2022. This recent rise indicates a renewed focus by the government on stabilizing agricultural funding and addressing the challenges faced during the pandemic and other economic disruptions (Figure 48).

However, it is important to note that, despite these recent increases, agricultural spending still represents only a small portion of the national budget, with just 2% allocated to the sector. This relatively low level of funding emphasizes the need for a more robust and sustained investment strategy to support and develop Angola's agricultural sector effectively (World Bank, 2021a).

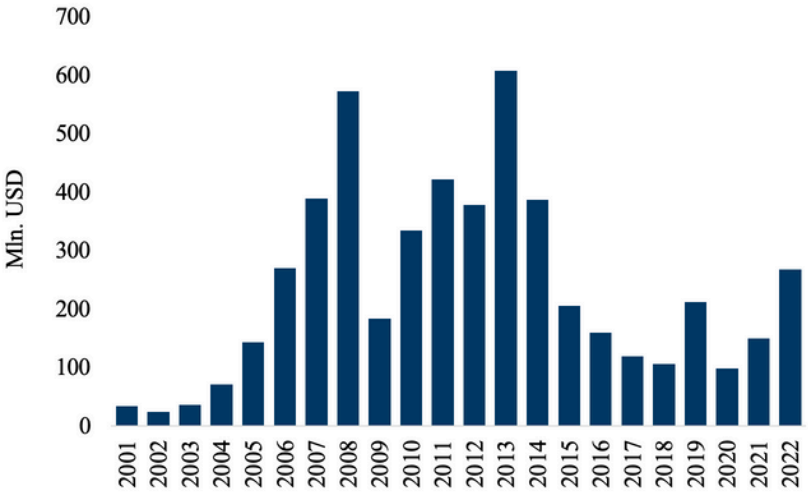

Figure 48. Central government expenditures to agriculture

Source: FAOSTAT data

Despite these fluctuations, it is important to note that Angola's agricultural sector receives substantial support compared to some other developing nations in the region. However, a large portion of this support is directed towards price mechanisms rather than public goods and services (World Bank, 2021a). Specifically, 98% of the support is allocated as so-called Market Support Mechanisms (MPS), leaving only 2% for budgetary support aimed at public goods and services. This allocation underscores the need for a more balanced approach to funding that supports both immediate market needs and long-term public goods.

Development flows to agriculture in Angola have varied significantly over the past two decades, reflecting both substantial increases and notable declines in external support. It also underscores the heavy reliance on domestic funding compared to the more modest levels of international assistance.

From 2000 to 2007, development flows gradually increased from USD 6 million to USD 16 million, showing initial growth. The most substantial boost occurred in 2008, with support reaching USD 35 million. However, this was followed by a period of relative stability and slight reductions, with annual flows fluctuating around USD 33 during 2009-2011. After fluctuations following further years, flows returned to over USD 26 million in 2018-2019. However, support fell again to USD 21 million in 2020 due to the COVID-19 pandemic. In 2021, a notable increase brought flows up to USD 29 million, aiming at post-COVID recovery (Figure 49).

The significant disparity between development flows and central government expenditures stresses the importance of domestic funding in supporting Angola’s agricultural sector. A balanced and sustained strategy is crucial to ensure long-term food security and economic stability.

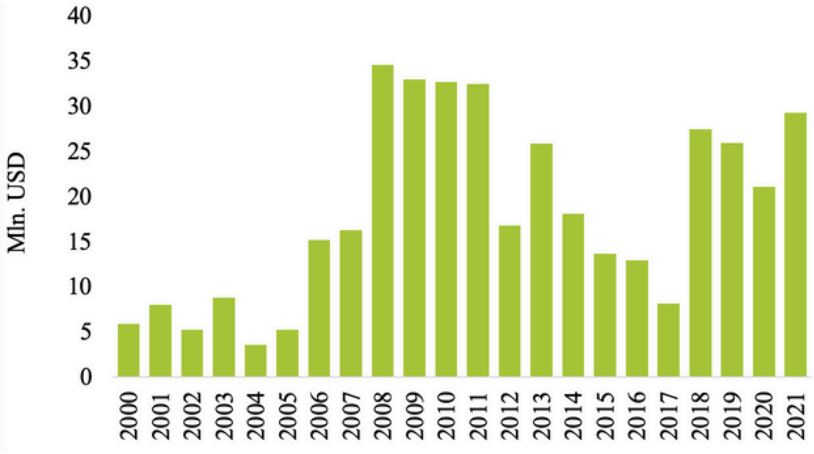

Figure 49. Development flows to agriculture, forestry, and fishery

Source: FAOSTAT data

Credit to agriculture in Angola, along with state budget support, remains a crucial financial tool for addressing both immediate needs and long-term stability in Angola's agricultural sector. Between 2009 and 2015, credit to agriculture saw substantial growth, increasing from USD 301 million to over USD 1.5 billion. This period of steady rise reflects significantly improved access to finance and a growing commitment to strengthening the agricultural sector (Figure 50).

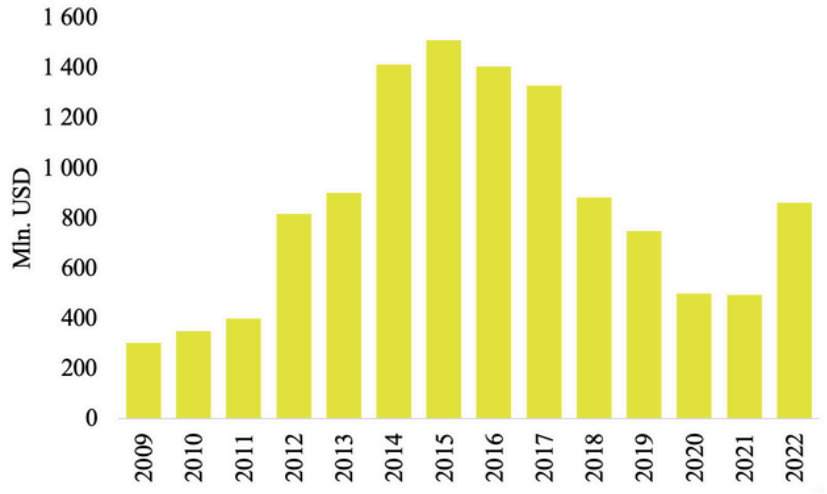

Figure 50. Credit to agriculture, forestry, and fishery

Source: FAOSTAT data

However, the following years brought notable challenges. From 2015 onward, credit levels began to decline, dropping to USD 1.3 billion in 2017 and further decreasing to USD 881 million in 2018. This decline highlights the sector's struggles amid shifting financial priorities and external pressures. The downward trend continued into 2020, exacerbated by the COVID-19 pandemic, with credit falling to USD 498 million. This reduction mirrored the broader economic disruptions caused by the global health crisis.

In 2021, credit stabilized slightly at USD 493 million, indicating some degree of financial stabilization despite ongoing challenges. A significant recovery was observed in 2022, with credit rising to USD 862 million. This rebound suggests a renewed focus on agricultural investment as the country navigated the aftermath of the COVID-19 crisis. Additionally, the recovery reflects Angola's response to the global food crisis triggered by Russia's invasion of Ukraine in February 2022, which further intensified the need for robust agricultural support.

2.6. ANGOLA: SUMMARY

Angola, with a population of 36 million as of 2022, has experienced rapid population growth over the past two decades. Economic growth in Angola has been highly volatile, driven by its oil exports. In the early 2010s, high oil prices fuelled economic expansion, but the decline in global oil prices in subsequent years led to a reduction in GDP per capita. Despite this, Angola's GDP per capita remains higher than that of the DRC and Cameroon. Economic progress has contributed to significant improvements in food security, with the prevalence of undernourishment decreasing from 64% to 22% over the last two decades.

The number of undernourished people has fallen from 11 million to 7 million, contrary to the regional trend. Angola has also seen improvements in dietary energy supply adequacy, which reached 114% in 2022, surpassing the regional average. Diet diversity has improved, with cereals, roots, and tubers now accounting for 62% of caloric intake, compared to 69% regionally. Protein intake has also increased, with average daily supply reaching 49 grams per person, though animal protein consumption remains stable.

Agriculture plays a vital role in Angola's economy, contributing 15% to GDP and employing 56% of the population as of 2023. Cassava is the main crop, with 10.6 million tons produced in 2022, followed by bananas, maize, and sweet potatoes. Livestock production, particularly of chicken and pigs, has seen significant growth, with chicken production increasing more than sevenfold over the past two decades. Angola's agricultural production has grown steadily, with the value of produced commodities in 2023 reaching 340% of the 2003 value. However, the sector remains vulnerable to climatic shocks, particularly droughts, which have led to sharp drops in crop production.

Angola's agricultural policies, outlined in the National Grain Plan (PLANAGRÃO) and the National Plan for Livestock Promotion (PLANAPECUÁRIA), aim to boost food security and reduce the country's dependence on food imports. Despite high tariffs on imported agricultural products, Angola remains heavily reliant on imports, particularly for cereals and meat. Infrastructure limitations, such as poor rural roads and insufficient storage facilities, further hinder the development of the agricultural sector. Angola's reliance on oil revenues has limited the government's ability to provide sustained investment in agriculture, though recent increases in public expenditure reflect a renewed focus on the sector's development.

3. CAMEROON

3.1. FOOD SECURITY

The population in Cameroon gradually increased over the last two decades (Figure 51). The main drivers of such growth were improved health system and high birth rates.

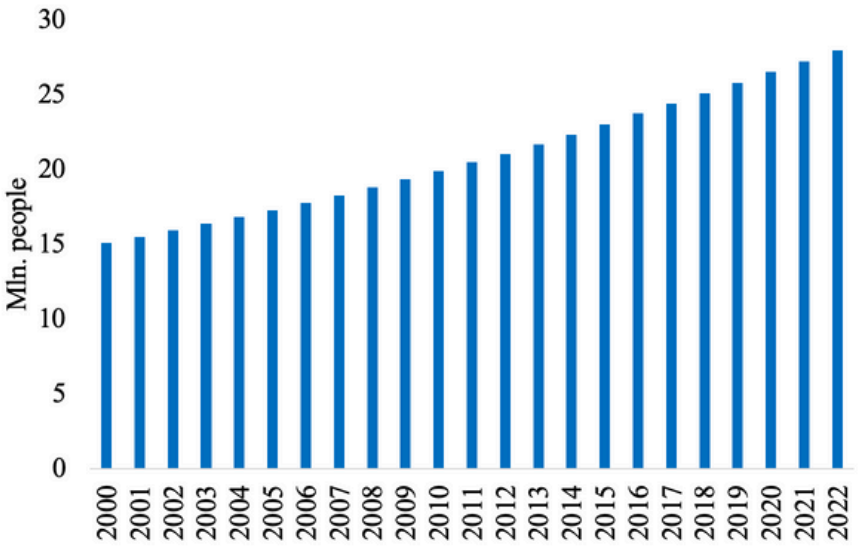

Figure 51. Total population in Cameroon

Source: World Bank

Economy of Cameroon showed gradual growth, with GDP per capita exceeding 1500 USD in 2022 (Figure 52).

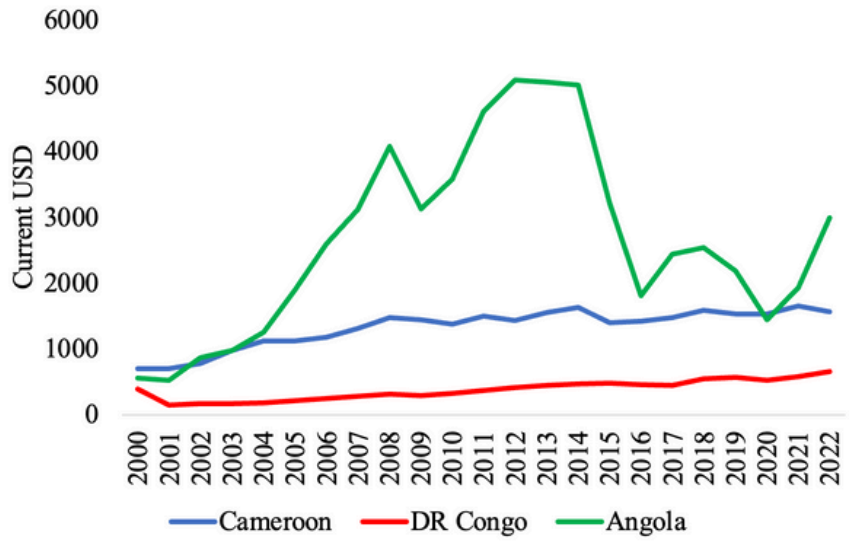

Figure 52. GDP per capita in Cameroon

Source: World Bank

The prevalence of undernourishment in Cameroon is much lower than on average in the region. Since 2000, this indicator decreased from 21 to 6% amidst the overall economic development and progress in local agriculture (Figure 53).

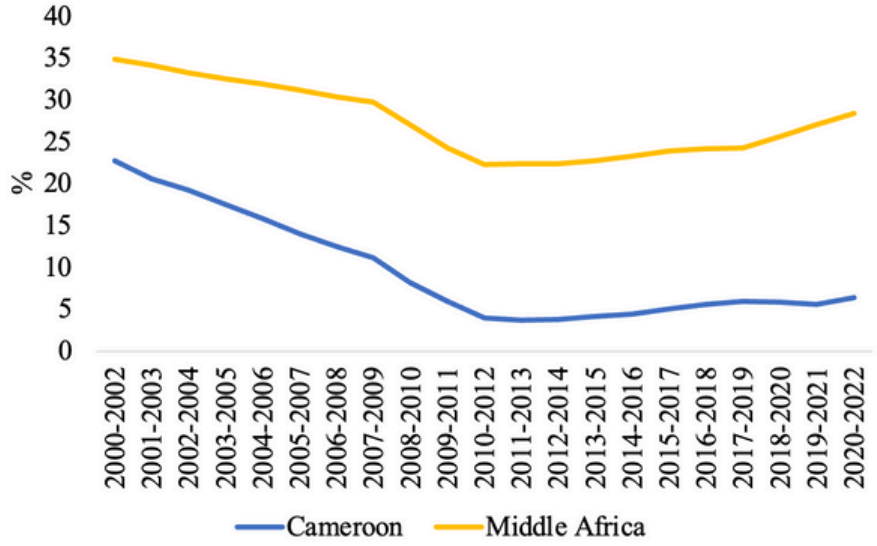

Figure 53. Prevalence of undernourishment in Cameroon

Source: FAOSTAT

IMeanwhile, the number of undernourished persons halved, reaching 1.7 mln. persons in 2022 (Figure 54). This was not aligned with the general trend in the region. As of 2022, only 3% of undernourished persons are from Cameroon.

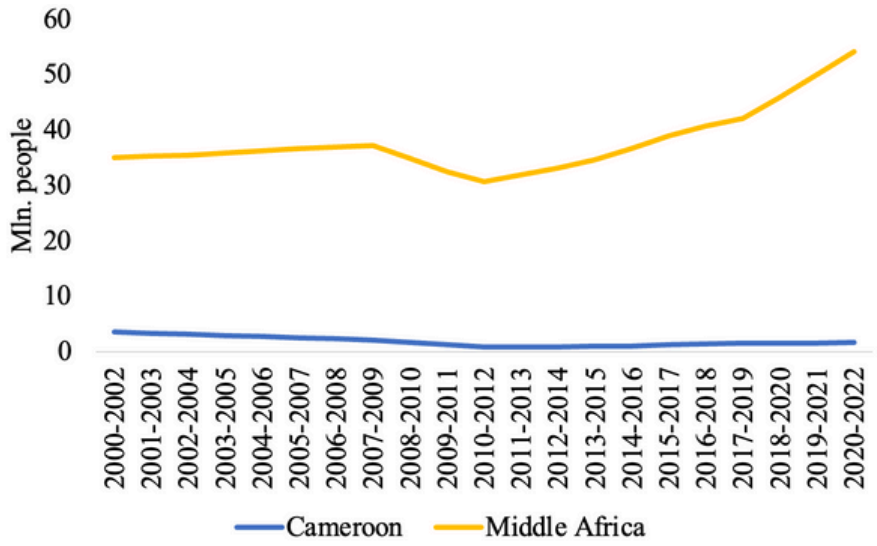

Figure 54. The number of undernourished persons in Cameroon

Source: FAOSTAT

The average dietary energy supply adequacy showed essential progress over the observed period, increasing from 103 to 124% (Figure 55).

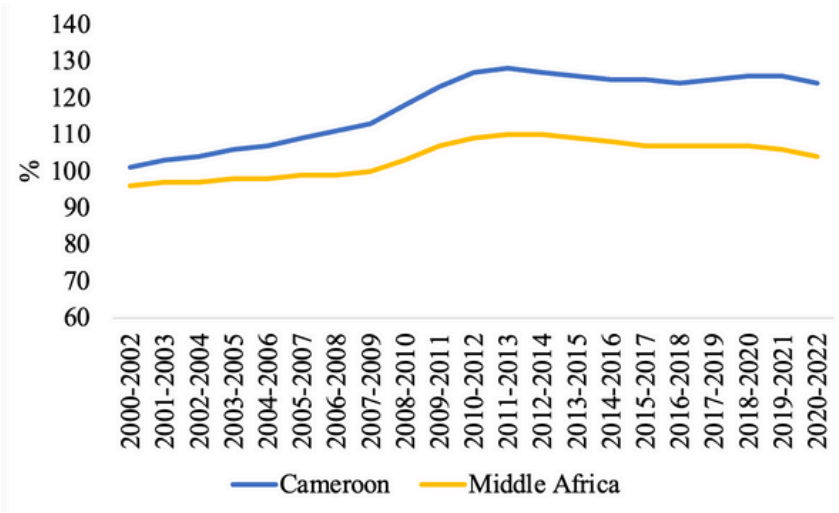

Figure 55. Average dietary energy supply adequacy in Cameroon

Source: FAOSTAT

The share of dietary energy supply derived from cereals, roots and tubers was relatively stable throughout the observed period at 56% (Figure 56).

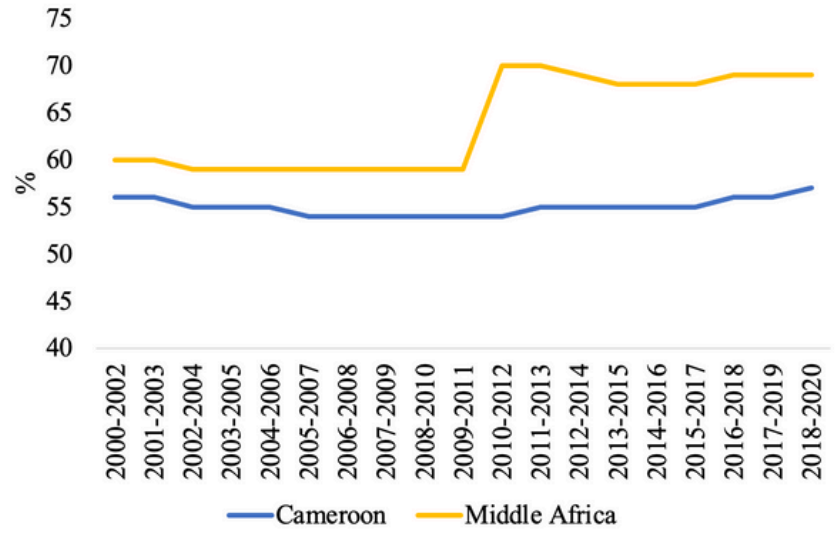

Figure 56. Share of dietary energy supply derived from cereals, roots and tubers in Cameroon

Source: FAOSTAT

As Figure 57 shows, the average protein supply gradually increased over the last two decades, which corresponds to the general trend in the region. But the average animal protein supply remained relatively stable (Figure 58).

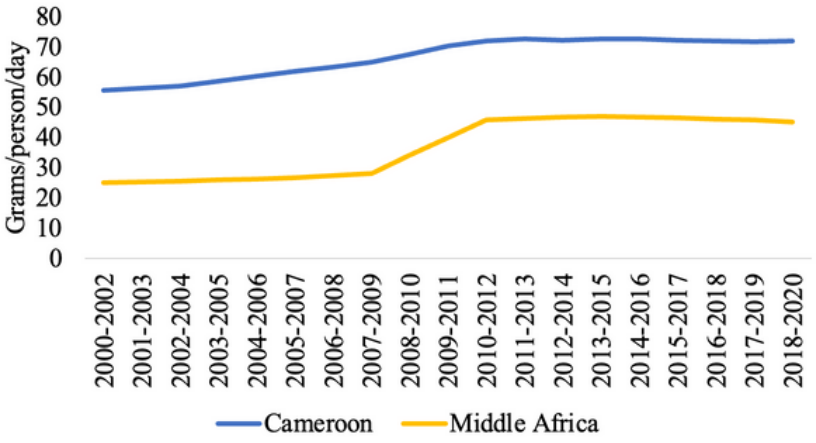

Figure 57. Average protein supply in Cameroon

Source: FAOSTAT

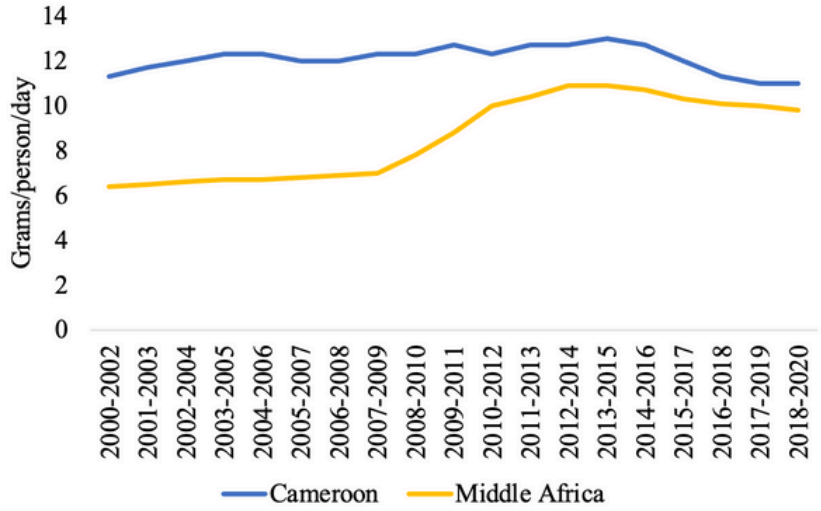

Figure 58. Average animal protein supply in Cameroon

Source: FAOSTAT

Meanwhile, the per capita food supply variability in Cameroon was similar to the average indicator in the region over the last two decades (Figure 59).

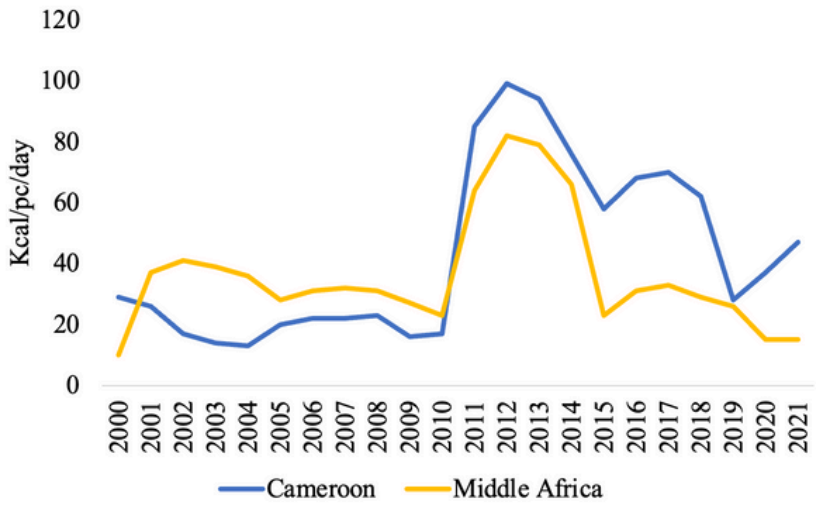

Figure 59. Per capita food supply variability in Cameroon

Source: FAOSTAT

The cereal import dependency ratio in Cameroon is close to the average regional value. Since 2000, it fluctuated around the same level of 32% (Figure 60).

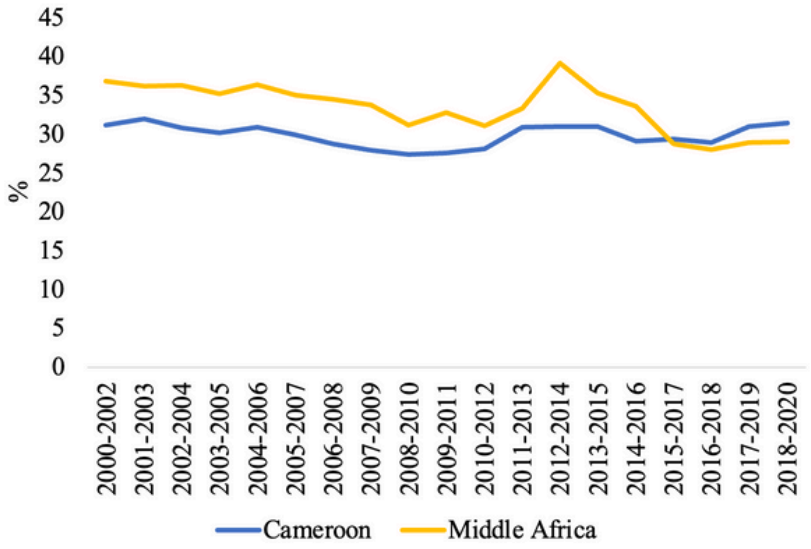

Figure 60. Cereal import dependency ratio in Cameroon

Source: FAOSTAT

3.2. AGRI-FOOD TRADE

Cameroonian food import has been gradually growing since mid-2010s in monetary terms. The main import category is cereals, followed by fish and crustaceans (Figure 61)

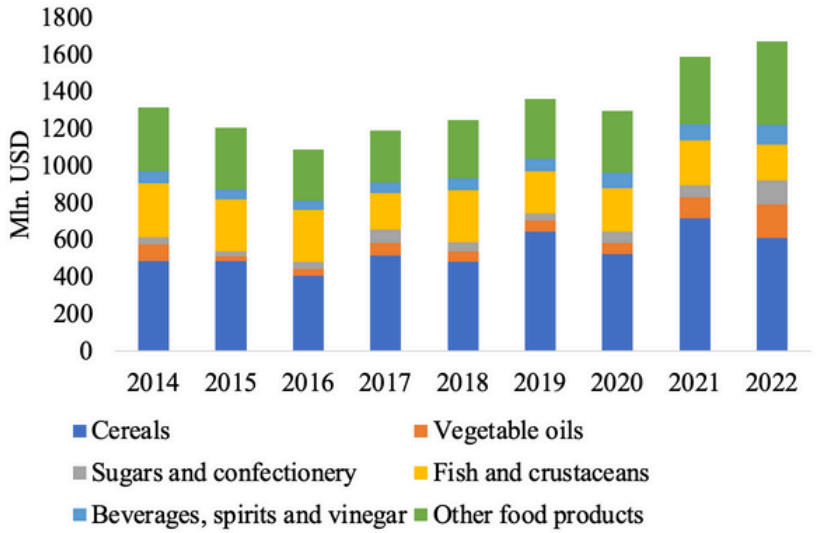

Figure 61. Product structure of food import to Cameroon

Source: ITC Trade Map

The geographical structure of import is quite diversified. Over the last decade, the main food importers to Cameroon were France, Thailand, and India. Since 2016, the share of Russian Federation in Cameroonian food imports increased substantially (Figure 62).

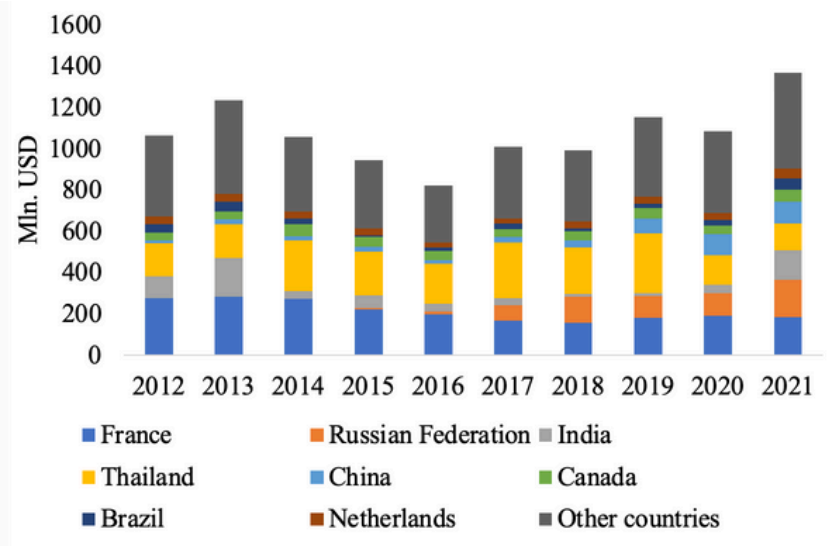

Figure 62. Geographical structure of food import to Cameroon

Source: ITC Trade Map

Amount of Ukrainian food imports to Cameroon is quite small (Figure 63). In 2018-2020, it did not exceed 5 million USD in value, with vegetables, roots and tubers being the main category. In 2021 there was a spike observed, due to increased import of cereals to Cameroon.

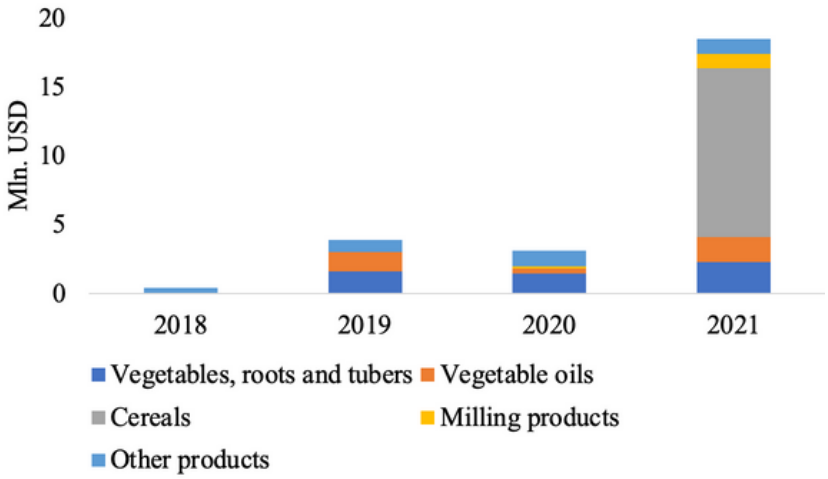

Figure 63. Food import from Ukraine to Cameroon

Source: ITC Trade Map

The export destinations are Pakistan, Netherlands and United Kingdom (especially for cut flowers), United Arab Emirates (Figure 65). Food exports from the country were gradually increasing since mid-2010s. The primary export product is cocoa. In 2022, a substantial increase of fruit and nuts export was observed (Figure 64).

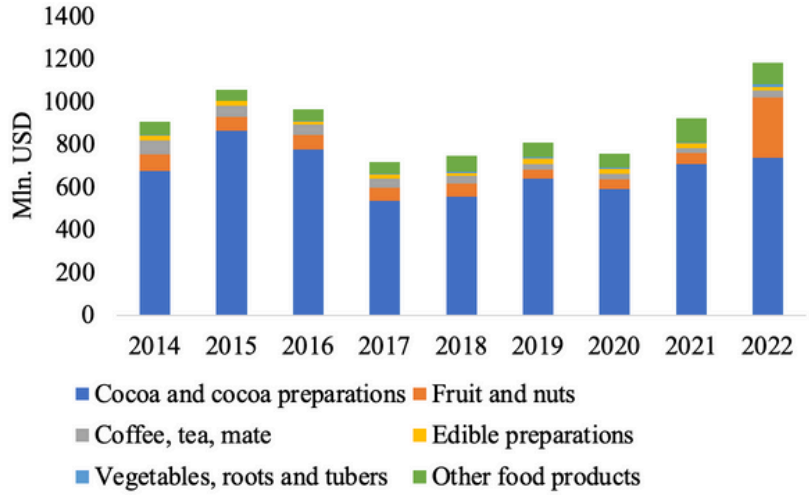

Figure 64. Product structure of food export from Cameroon

Source: ITC Trade Map

The primary destination of Cameroonian food exports is Netherlands and France (Figure 65). Additionally, over the past decade a steady growth of exports to Bangladesh was observed. Export volumes to Ukraine are quite small.

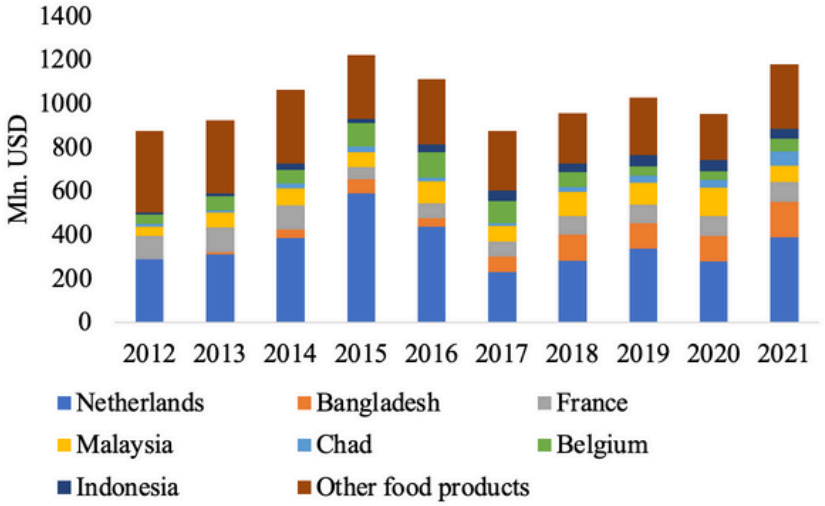

Figure 65. Geographical structure of food exports from Cameroon

Source: ITC Trade Map

3.3. LOCAL AGRICULTURAL SECTOR

Agriculture plays an important role in the Cameroonian economy. It's share in nation's GDP has remained relatively unchanged since mid-1990s. In 2023, it reached 17%, which is 1.5 percentage points lower that the 1993 value. At the same time, share of working population, engaged in agricultural production, has been decreasing gradually. Up until early 2010s, agriculture employed a majority of working population. As of 2022, this share reached 42% (Figure 66).

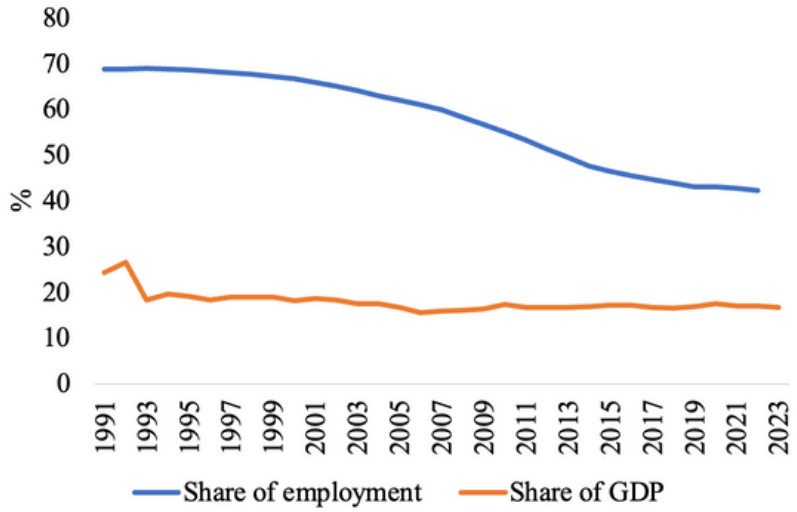

Figure 66. Share of agriculture in GDP and total employment in Angola

Source: World Bank database

While share of agriculture in Cameroonian GDP and national employment have been decreasing, value of agricultural production has exhibited a persistent growth. In 2023, monetary value of produced commodities in constant 2015 USD accounted for approx. 180% of the 2003 value (Figure 67).

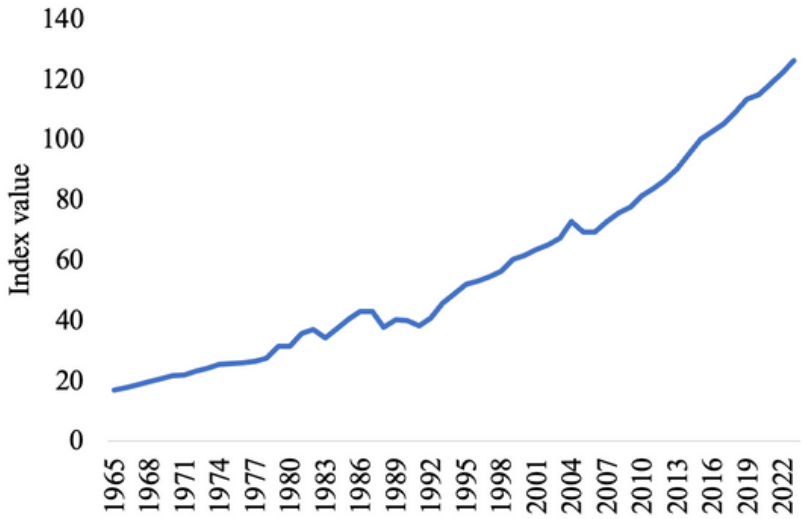

Figure 67. Agricultural production value index, constant 2015 USD. Baseline: 2015

Source: World Bank database

Crop production

Two main crops produced in Cameroon are cassava and plantains, with 6.3 and 4.7 million tons produced in 2022, respectively. They are followed by oil palms, maize, and taro. Throughout the last two decades commodity structure of the crop production undergone slight changes. Sugar cane, which was the second most-grown crop in 2001 with 1.4 million tons produced, declined throughout 2001-2022 down to 1.2 million tons. A rapid growth was observed for plantains and cassava, production amounts of which have increased by 393% and 322% in 2001-2022, respectively (Figure 68).

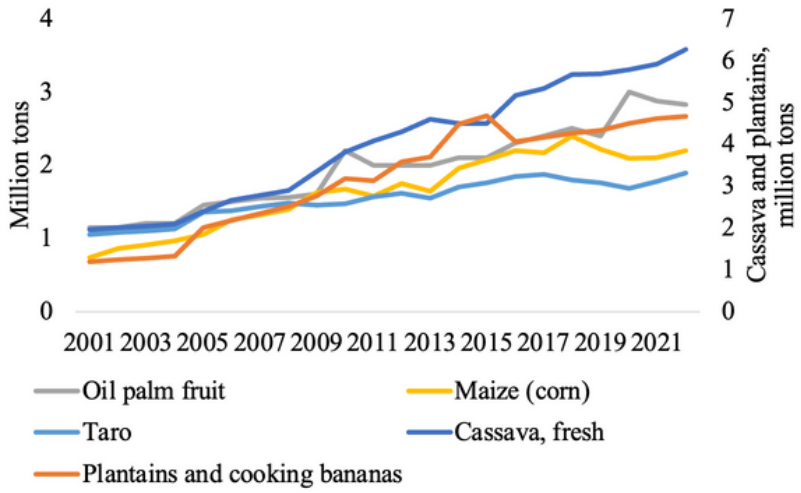

Figure 68. Production amounts of the 5 most-produced crops in Cameroon, 2001-2022

Source: FAOSTAT

Land use and sown areas

As of 2021, there were 98 thousand square kilometers of agricultural land in Cameroon, which is approx. 21% of the total country's area. Amount of agricultural land remained relatively through the past three decades, after a period of gradual growth in 1960s-1980s (Figure 69). The crop structure is dominated by maize, in 2022 it accounted for almost 1.3 million hectares. It is followed by sorghum, cocoa beans, plantains, and cassava.

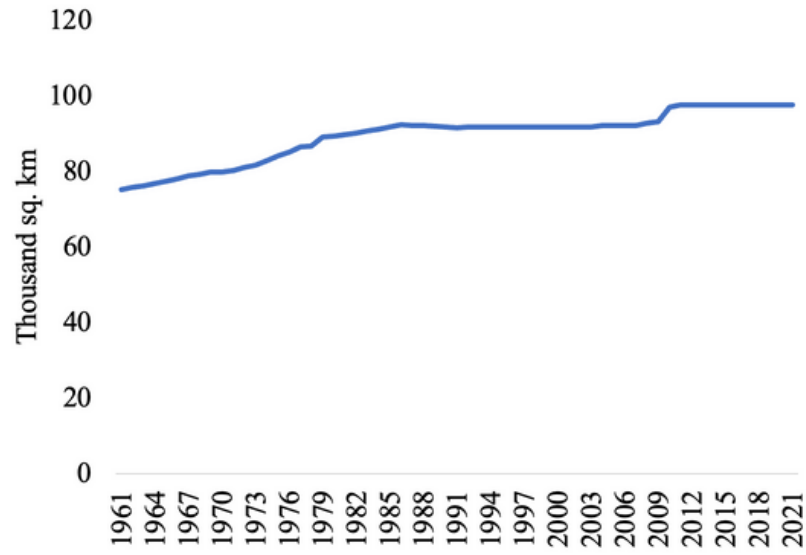

Figure 69. Agricultural land in Cameroon.

Source: World Bank Database

According to FAO's AQUASTAT, as of 2021, approx. 40% of the cultivated land have been equipped for irrigation (3.2 million hectares) This area remained unchanged over the past two decades.

Livestock production

Cow milk is the most produced livestock commodity in Cameroon. As of 2022, 206 thousand tons of it has been produced. Milk is followed by chicken and cattle meat. Another commonly produced livestock commodity is chicken eggs, with 88 thousand tons of them produced in 2022.

The drop in livestock commodities production in 2019-2020 was primarily caused by the intensified conflict in the Northern and North-Western parts of the country, which caused displacement of livestock farmers, theft, and restricted access to grazing areas, alongside disruptions caused by COVID-19 restrictions that hindered livestock trade and market access (FEWS, 2020). Over the last two decades, commodity structure of livestock production did not change significantly. A gradual growth was observed for cattle milk and meat, as well as chicken meat. The fastest growing commodity was chicken eggs, with 2022 production amount 2.5 times higher of the 2002 level (Figure 70).

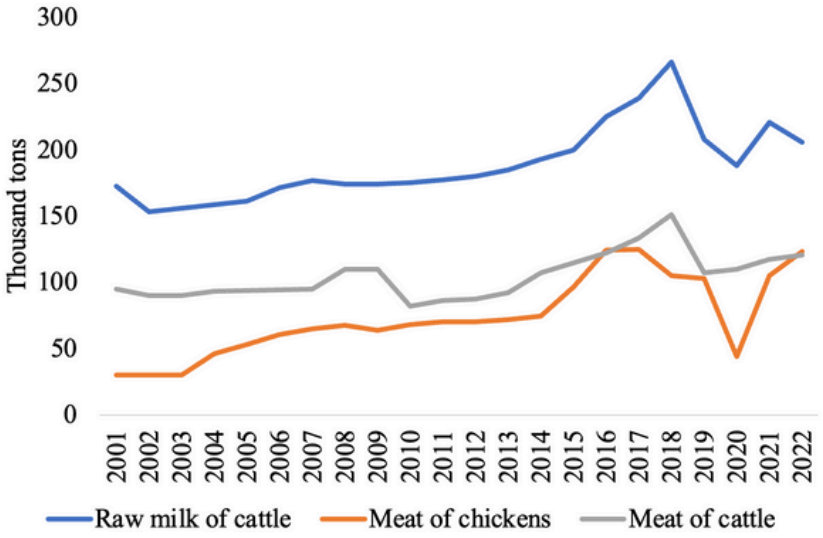

Figure 70. Livestock commodities production in Cameroon, 2001-2022

Source: FAOSTAT

Live animals stock data reflects the production statistics with the highest growth rates observed for chicken and goat populations. Over the last two decades, number of chickens increased from 31 to 51 million (Figure 71). The negative spike in population of chickens in 2020 is caused by the outbreak of avian influenza, which was exaggerated by the COVID-19 restrictions. Populations of other animals remained relatively unchanged over the observed period, however, with some fluctuations.

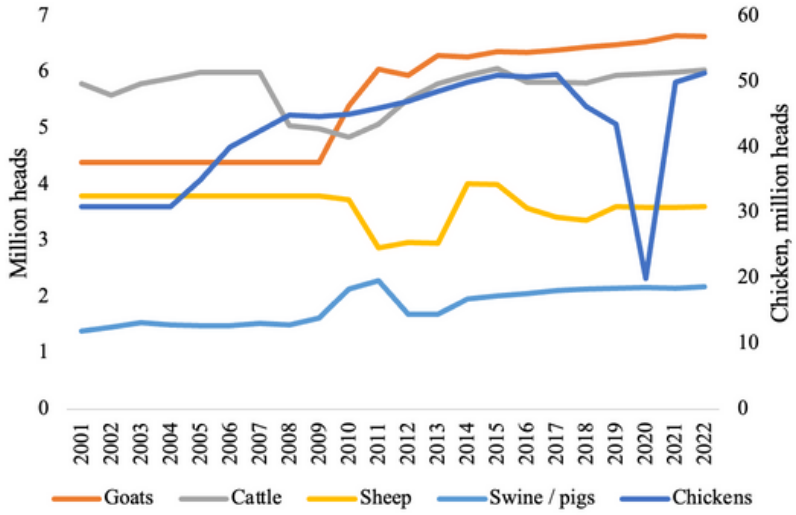

Figure 71. Live animals stock in Angola, 2001-2022

Source: FAOSTAT

Processing sector

According to the World Bank's latest available data, as of 2008, value added produced by food, beverages, and tobacco processing sector amounted to 4.6% of the Cameroonian GDP. Due to lack of data, it is not possible to assess its development over the years.

The main processed agricultural commodities in Cameroon are sugar, palm oil, and cotton, as well as their byproducts. As of their byproducts, 240, 84, and 34 thousand tons of cotton seeds, palm kernels, and molasses have been produced. Since late 2000s, production of both cotton lint and seeds have exhibited the highest growth rate among the mentioned commodities (Figure 72).

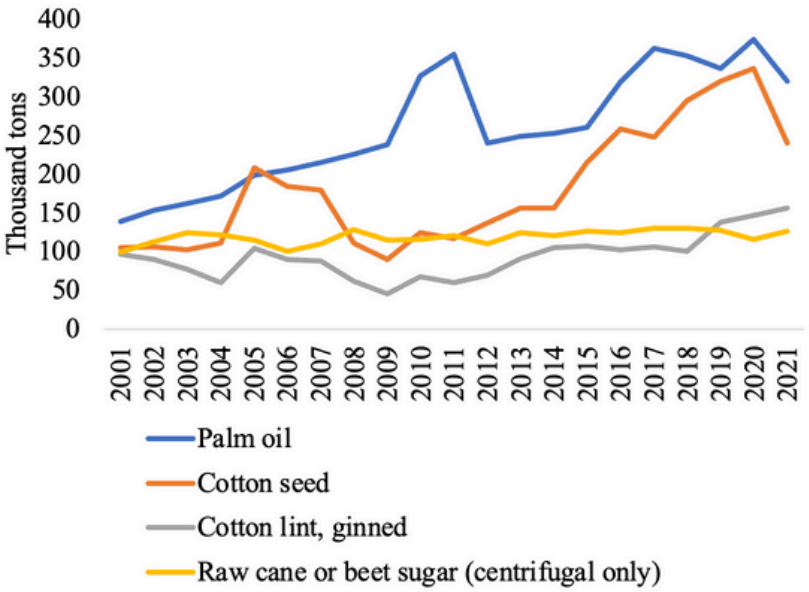

Figure 72. Processed commodities production in Cameroon, 2001-2021

Source: FAOSTAT

3.4. CHALLENGES IN AGRICULTURE

Climate change and variability

Climate change poses a significant threat to agriculture in Cameroon. The country experiences high rainfall variability, frequent droughts, and extreme weather events such as floods, which disrupt agricultural activities and reduce crop yields (Boko et al., 2007). In regions like Northern Cameroon, droughts have led to severe reductions in soil moisture, decreasing agricultural productivity and causing food shortages and long-term food insecurity. Besides that, increased occurrence of extreme weather events such as frost, particularly in the mountainous regions, further reduces crop yields and affects the livelihoods of farmers (Ngoufo Sogang & Monkouop, 2022). The effects of climate change are exaggerated by the country's limited capacity for irrigation and its reliance on rain-fed agriculture.

Limited access to technology and quality inputs

Cameroonian farmers face significant challenges related to access to agricultural inputs such as quality seeds, fertilizers, and pesticides. Many smallholder farmers continue to use outdated traditional farming methods due to the high cost and limited availability of modern agricultural inputs (Abia et al., 2016). The use of improved seeds is low, with less than 60% of farmers using chemical fertilizers, and even those who do often cannot meet their full fertilizer needs (Abia et al., 2016). Additionally, there is a lack of access to modern farming equipment, which limits productivity and hinders the ability of farmers to expand and intensify their operations. The problem is further exacerbated by insufficient extension services and inadequate training for farmers on the use of modern agricultural practices and technologies. Without proper knowledge transfer, farmers are unable to effectively implement new techniques that could improve crop yields and reduce losses (Ngoufo Sogang & Monkouop, 2022).

Poor infrastructure and lack of market access

Poor infrastructure is another significant barrier to agricultural productivity in Cameroon. The country suffers from inadequate rural road networks, insufficient storage facilities, and a lack of reliable transport systems, which result in high transaction costs and substantial post-harvest losses. Farmers face difficulties in accessing local and international markets, which limits their ability to sell their produce at competitive prices (Abia et al., 2016). Furthermore, many agricultural markets in Cameroon are poorly organized, lacking the necessary infrastructure for efficient trading. This disorganization leads to market inefficiencies, such as price volatility and limited market information, which undermine farmers' earnings and discourage investment in agricultural production (Ngoufo Sogang & Monkouop, 2022).

Institutional and policy constraints

The agricultural sector in Cameroon is also hindered by policy and institutional challenges. Issues such as inconsistent policy implementation, bureaucratic inefficiencies, and limited government support for smallholder farmers have restricted agricultural growth. For instance, policies aimed at providing subsidies and financial support to farmers are often inadequately implemented, resulting in limited impact on sector's performance. Land tenure insecurity is another critical institutional challenge. Many farmers operate without formal land titles, which limits their access to credit and reduces their incentive to invest in land improvements and sustainable agricultural practices (Abia et al., 2016).

3.5. AGRICULTURAL POLICY OVERVIEW

Agriculture holds a significant place in Cameroon's economy, employing over half of the workforce. The development of this sector is essential not only for economic growth but also for improving living standards, reducing reliance on oil exports – an industry that generates a substantial portion of foreign currency revenues. However, the country faces several agricultural policy challenges, including widespread food insecurity and a high dependence on imported goods.

Cameroon, like many other African nations, has become increasingly vulnerable due to external crises such as the COVID-19 pandemic and Russia's invasion of Ukraine in 2022. These events led to price shocks and supply disruptions of essential goods and fertilizers. By April 2022, the price of rice – a staple in the Cameroonian diet – had increased by 15% compared to December 2021, according to the WFP. Other critical food items, including wheat and vegetable oils (especially palm oil), also saw significant price hikes. Given these challenges, a primary goal of agricultural policy is to enhance domestic production to reduce external dependencies, improve food security, and boost incomes alongside overall economic growth.

Cameroon's broader economic development framework is guided by the N**ational Development Strategy for 2030 (NDS30)** (Ministry of Economy, Planning and Regional Development, 2020). This strategy emphasizes accelerating domestic production, improving infrastructure, and focusing on technology to enhance productivity across sectors, including agriculture. A significant portion of investment is earmarked for the agricultural sector as part of these broader economic goals.

In addition, the strategic framework for Cameroon's development is outlined in the **Vision 2035** document, which sets the key goals for the country's long-term growth (Ministry of Economy, Planning and Regional Development, 2009). Within the agricultural sector, this strategy emphasizes enhancing technological capacity among producers, requiring significant investment and targeted support programs. A major focus is increasing the use of agricultural machinery relative to the area of cultivated land. Other measures outlined in the «agricultural revolution» vision include reforms to land rights policies, advancements in mechanization and irrigation, provision of agricultural inputs, strengthening market chains, boosting the processing industry, and improving the sector's financial capacity. These efforts aim to modernize agricultural practices and promote sustainable growth. In 2024, the World Bank announced a commitment of approximately USD 2 billion to support the implementation of Cameroon's Vision 2035, including a significant focus on agricultural development as part of the aid package.

Despite the large role agriculture plays in the economy, government spending on the sector has remained relatively modest. Between 2017 and 2021, agricultural expenditure ranged from USD 200 million in 2017 to over USD 400 million in 2021, representing 3-5% of the total national budget (Figure 73). The main focus of these budget allocations has been on infrastructure modernization and production capacity improvements, with over half of the 2021 budget for the Ministry of Agriculture and Rural Development dedicated to these goals (Kouam et al., 2021). In the same year, more than 17% of the agricultural budget was spent on enhancing productivity and

competitiveness. Overall, nearly three-quarters of the ministry's total spending is directed toward investment initiatives, while relatively less attention is paid to recurrent expenditures, which largely address food security improvement measures.

Figure 73. Central government expenditures to agriculture

Source: FAOSTAT data

In addition to direct budgetary allocations, the Cameroonian government has turned to other mechanisms to support the agricultural sector, including tax incentives for domestic producers. In early 2024, the government reduced land tax rates by 92% for all agricultural producers, aiming to ease the tax burden and encourage the expansion of domestic production, thereby reducing the country's dependence on food imports (Africa24, 2024). Furthermore, in 2023, a law was passed granting tax relief to companies investing in local agriculture, alongside reduced import duties on agricultural machinery components (Republic of Cameroon, 2023).

Given the constrained resources of Cameroon's economy and national budget, attracting additional financial tools such as donor funds, as well as credit and investment flows from domestic and international players, is essential for agricultural development. Over the past decade, donor funding for agriculture in Cameroon has averaged USD 107 million per year, nearly doubling since the early 2010s. This increase reflects the growing willingness of international organizations and donors to participate in strengthening Cameroon's agricultural resilience.

One of the major support programs introduced in response to the crisis exacerbated by Russia's invasion of Ukraine is the **Agricultural Production Support Programme in Cameroon (PARPAC).** The primary objective of PARPAC is to accelerate the production of key crops, including rice, maize, soybeans, palm oil, and certain vegetables (African Development Bank, 2022). The program also involves direct support to local farmers through the procurement of agricultural inputs, addressing the price crisis for such supplies. This assistance includes the distribution of seeds and fertilizers to small and vulnerable farming households. PARPAC also incorporates the implementation of previously declared but unfulfilled government policies and reforms. The program's total financial package amounts to nearly €70 million, provided in the form of a loan to the central government.

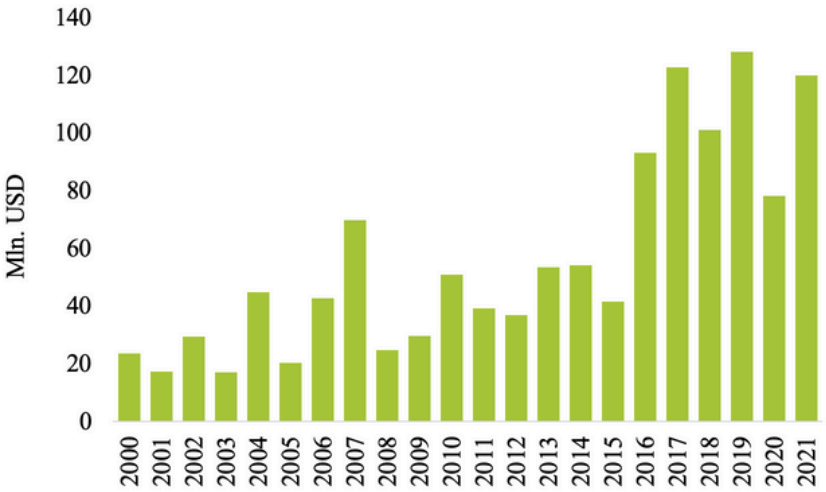

Figure 74.
Development flows to agriculture, forestry, and fishery

Source: FAOSTAT data

In 2024, the **Cameroon Emergency Food Crisis Response Project** was launched by the Food and Agriculture Organization (FAO) to help mitigate the impact of the global food crisis (FAO, 2024). The project, worth approximately USD 3 million, provides support through the distribution of agricultural inputs, such as drought-resistant seeds and essential equipment for farmers.

Additionally, certain programs focus on promoting sustainable agricultural practices. For instance, in 2024, the **Central Africa Forest Initiative (CAFI)** launched a USD 20 million donor project aimed at supporting small-scale cocoa and coffee producers and exporters (IFAD, 2024). This initiative emphasizes sustainable practices that comply with updated European Union standards and regulations.

In terms of trade policy, Cameroon, despite being a member of the World Trade Organization since 1995, maintains a notably protectionist stance toward food products. According to WTO data, the average level of applied final bound duties for agricultural products such as fruits and vegetables, vegetable oils, meat, and dairy products is a substantial 80%. Even under the Most Favoured Nation (MFN) category, which offers reduced import duties, the rates remain relatively high – averaging 19% for meat and up to 30% for fruits and vegetables. However, Cameroon applies more favourable customs rates for agricultural goods imported from the European Union and the United Kingdom, with average import duties of 10% and 8%, respectively. This approach highlights the country's strategic balancing act: while it protects its domestic agricultural industry with high tariffs, it also seeks to foster trade relations with key partners such as the EU and the UK. Such policies are reflective of Cameroon's broader objective of shielding its agricultural sector while simultaneously engaging in selective international trade agreements.

3.6. CAMEROON: SUMMARY

Cameroon, with a population of over 28 million people, has seen steady population growth over the last two decades, driven by improved healthcare and high birth rates. The country's economy has shown gradual growth, with GDP per capita surpassing USD 1,500 in 2022. Cameroon has made significant progress in reducing undernourishment, with the prevalence of undernourishment dropping from 21% in 2000 to 6% in 2022, which a significant improvement, as compared to other countries in the region. The number of undernourished people has halved, reaching 1.7 million, while dietary energy supply adequacy has increased to 124%, indicating a surplus in food availability.

Cameroon's food imports have grown steadily, particularly in cereals and fish, while food exports, primarily cocoa, have also increased. The geographical structure of trade is diversified, with France, Thailand, and India being key import partners, while the Netherlands and France dominate export destinations. The cereal import dependency ratio has remained stable at around 32%, close to the regional average.

Agriculture remains central to Cameroon's economy, contributing 17% to GDP and employing 42% of the workforce in 2023. Cassava and plantains are the main crops, with production increasing by over 300% since 2001. Maize, oil palm, and taro are also significant crops. Livestock production, particularly of cattle and chicken, plays a critical role in the agricultural sector. However, the sector faces several challenges, including poor infrastructure, limited access to technology and quality inputs, and land tenure insecurity. Climate change further exacerbates these challenges, with increased rainfall variability and frequent droughts negatively impacting crop yields.

Cameroon's agricultural policies are guided by the National Development Strategy for 2030 (NDS30) and Vision 2035, which focus on enhancing productivity, improving infrastructure, and promoting mechanization. Government spending on agriculture has remained relatively modest, with agricultural expenditure accounting for 3-5% of the national budget. In addition to public investment, Cameroon relies heavily on international donor support, with donor funding for agriculture averaging 107 million USD annually over the past decade. The country has implemented high import tariffs to protect its domestic agricultural sector, but it remains heavily dependent on food imports, particularly for staples like rice and wheat. Recent policy initiatives, such as the Agricultural Production Support Program (PARPAC), aim to accelerate production and reduce reliance on imports, while promoting sustainable agricultural practices.

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