

# Changes in the West African agro-food value chains

Rural-urban connections in Sub-Saharan Africa  
25-28 January 2016 – Copenhagen, Denmark

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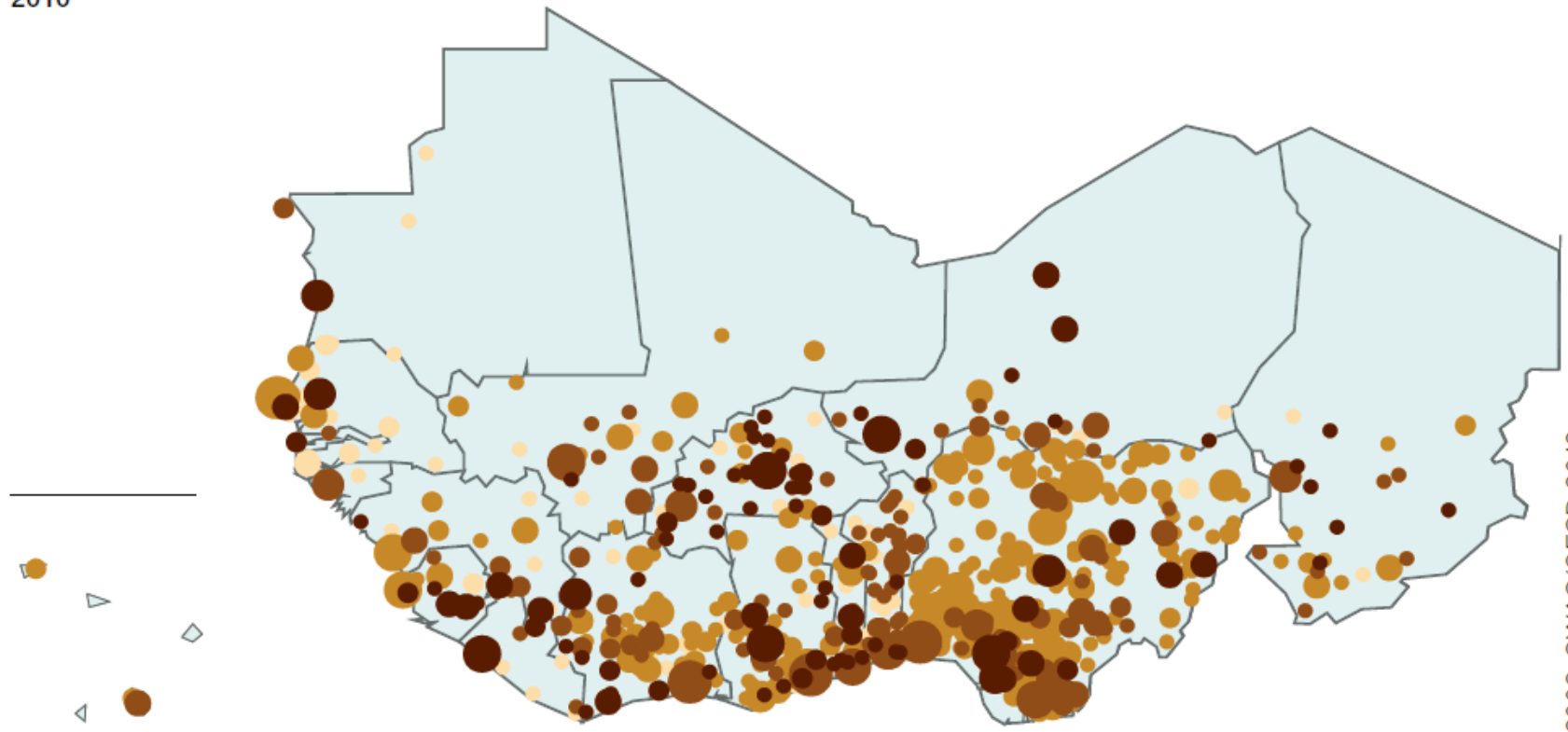
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# A peopling region

2010



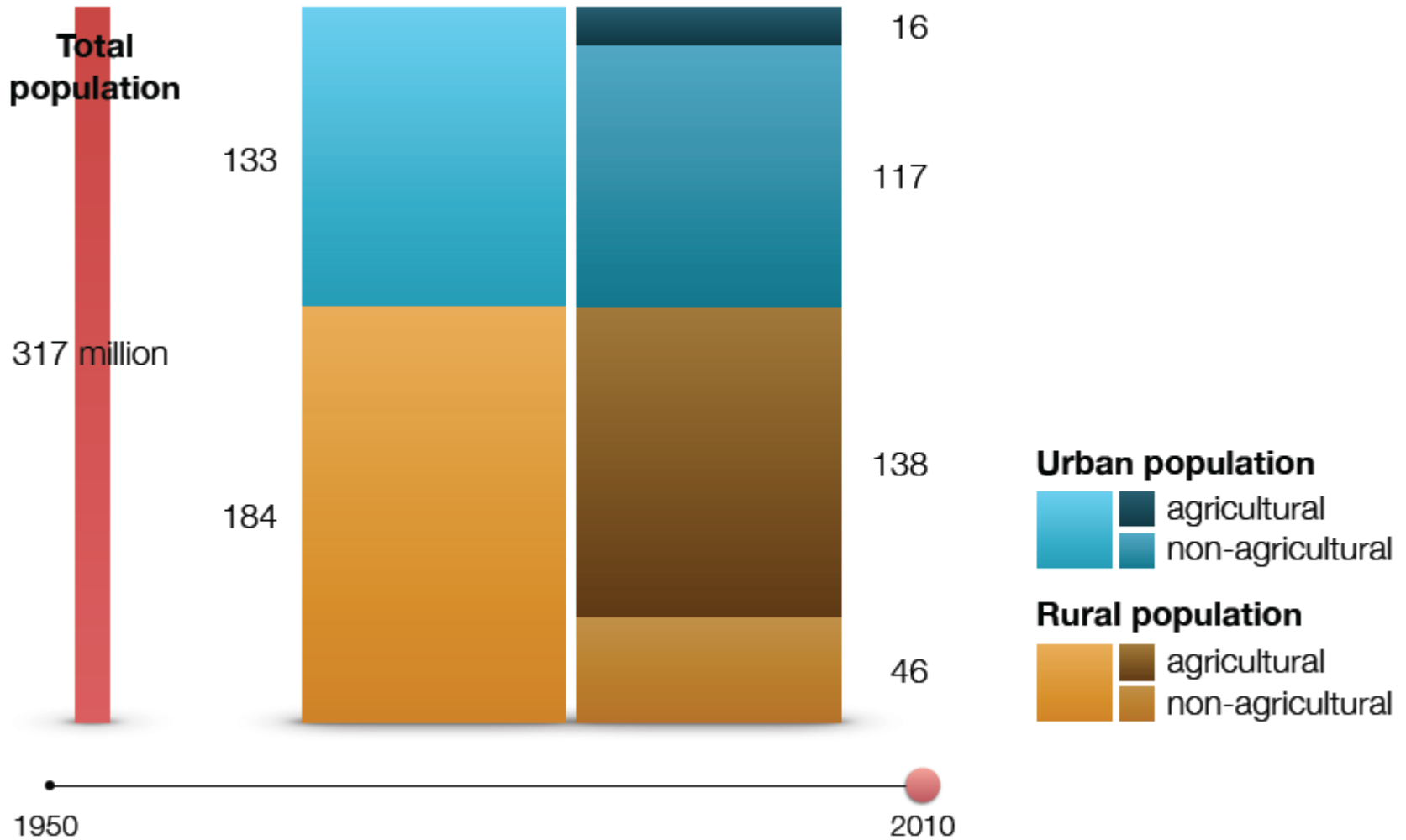
Growth of city population,  
1950 – 1980 and 1980 – 2010 (%)

- |                  |             |
|------------------|-------------|
| ● Not applicable | ● 300 – 400 |
| ● < 200          | ● > 400     |
| ● 200 – 299      |             |

Cities, inhabitants

- |                     |                       |
|---------------------|-----------------------|
| ○ 20 000 – 50 000   | ○ 350 000 – 1 million |
| ○ 50 000 – 100 000  | ○ 1 – 2 million       |
| ○ 100 000 – 350 000 | ○ > 2 million         |

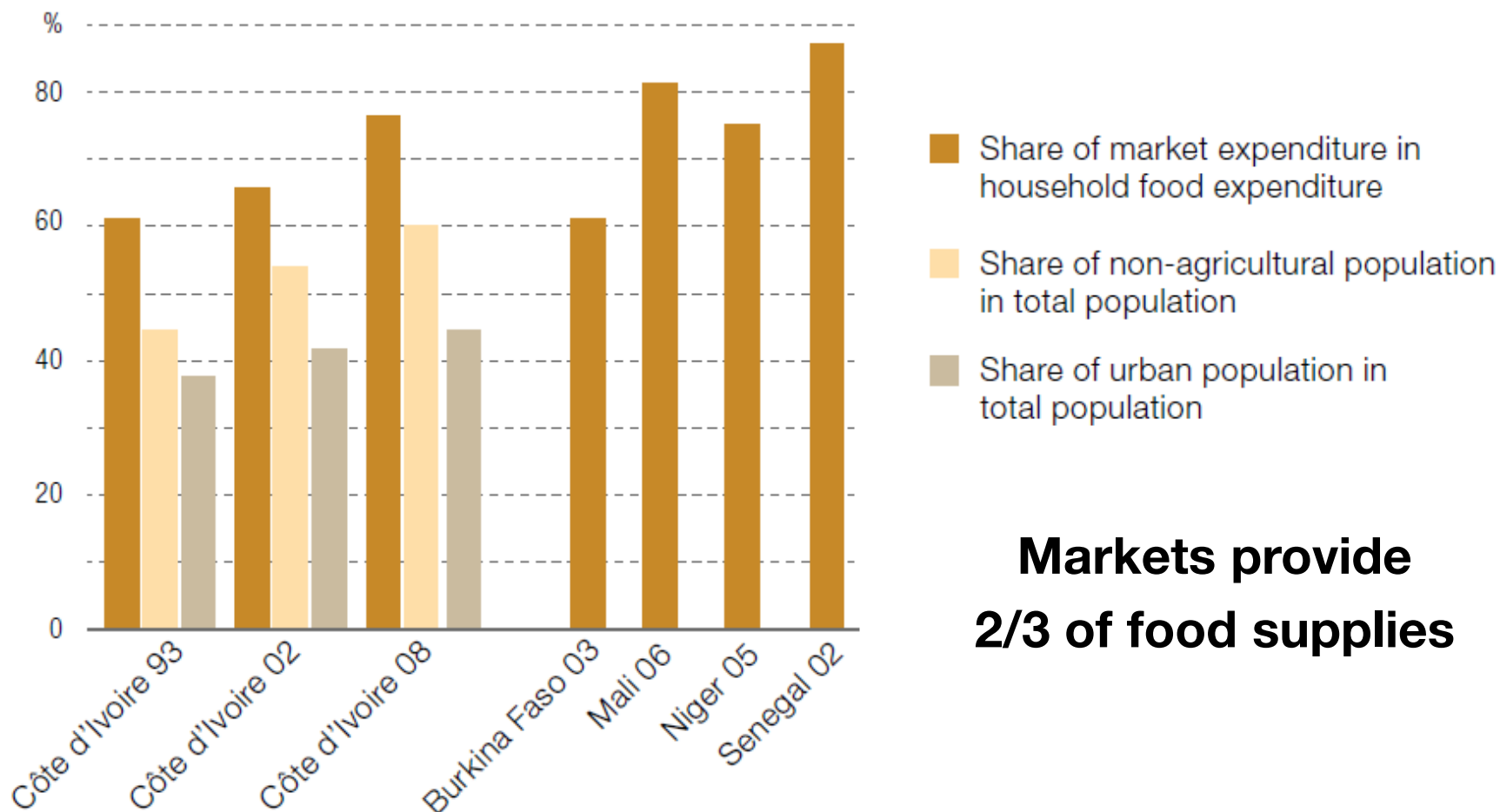
# Structural transformations



# The growing role of markets

# Markets, primary source of food supply

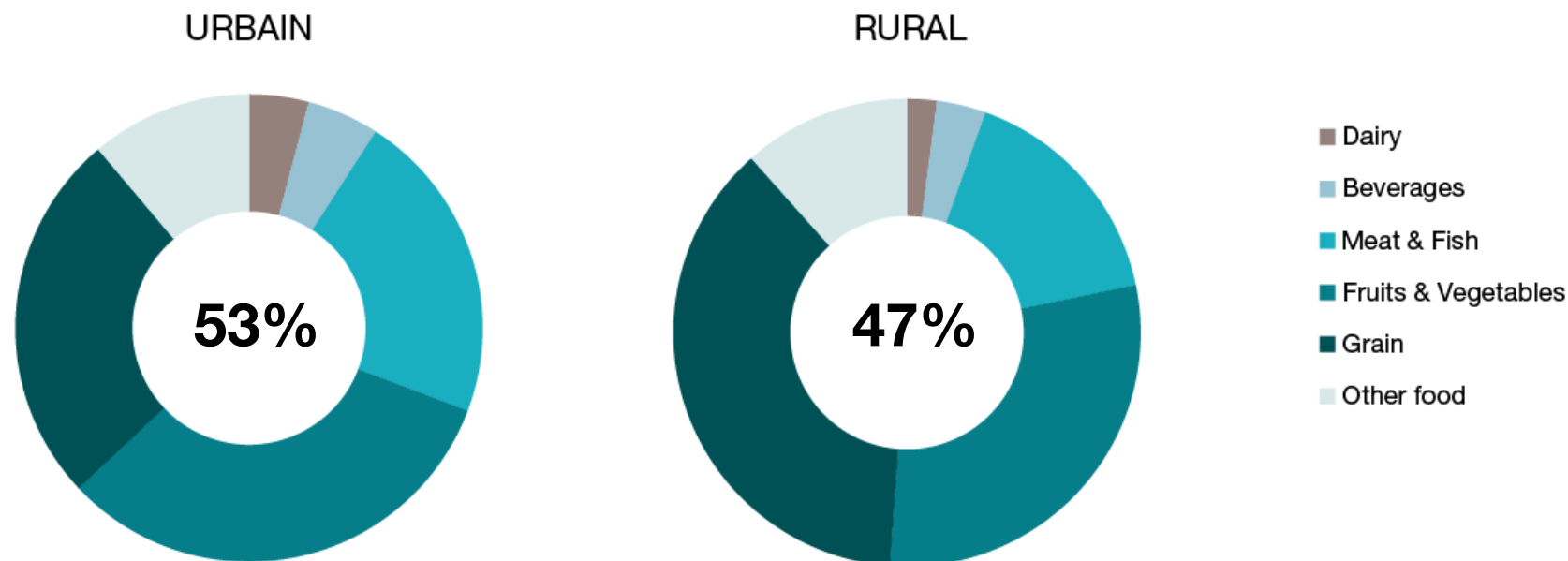
Share of market expenditure in total food expenditure



**Markets provide  
2/3 of food supplies**

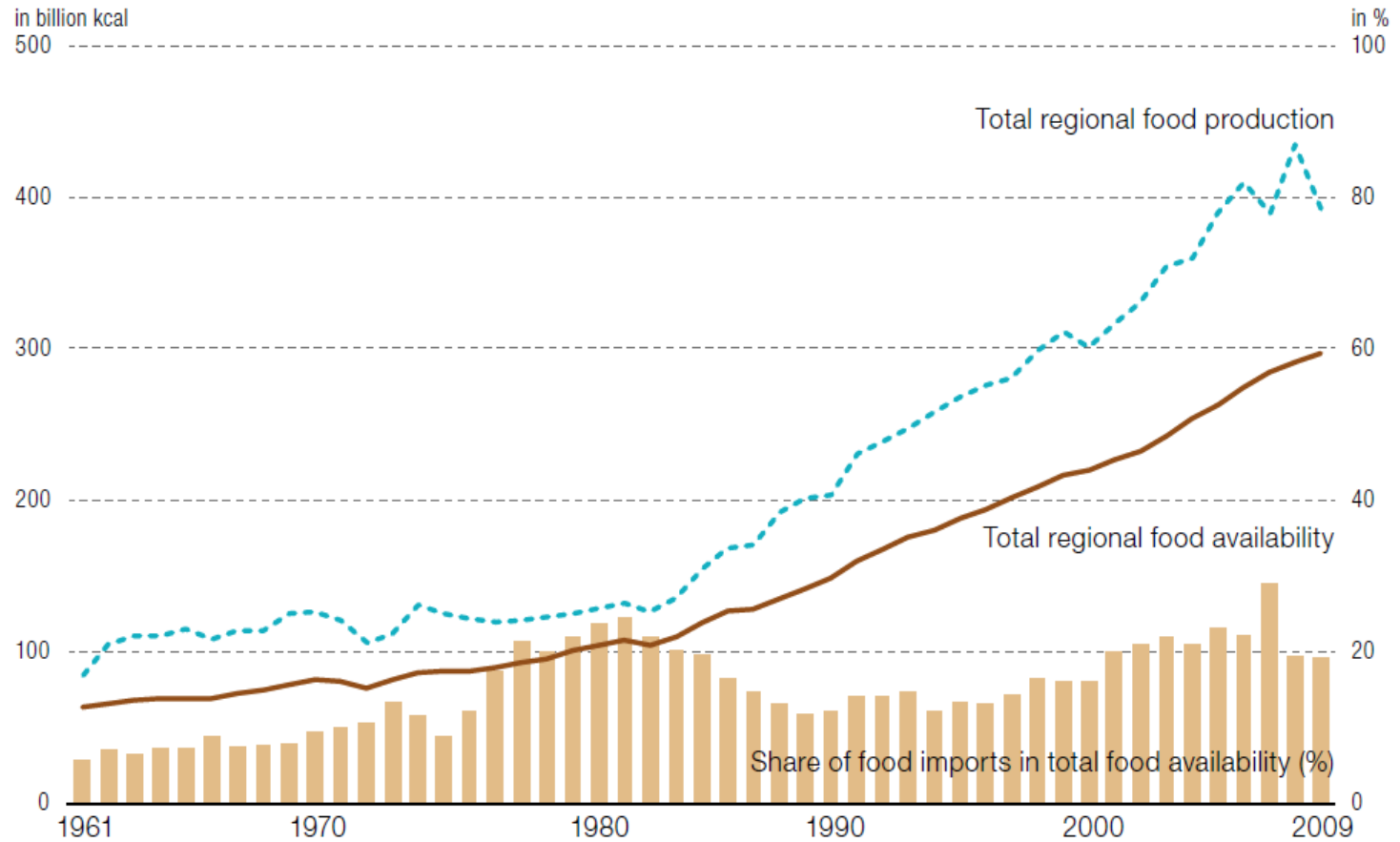
Sources: MSU, SRAI programme 2011; FAO, PopSTAT; SWAC/OECD 2012

- West Africa food economy: **175 billion USD in 2010**
  - Total value traded on markets: 120 billion USD
- **Urban spend 50% more than rural on food (per capita consumption)**



# Transformations in Agriculture

# Meeting demand

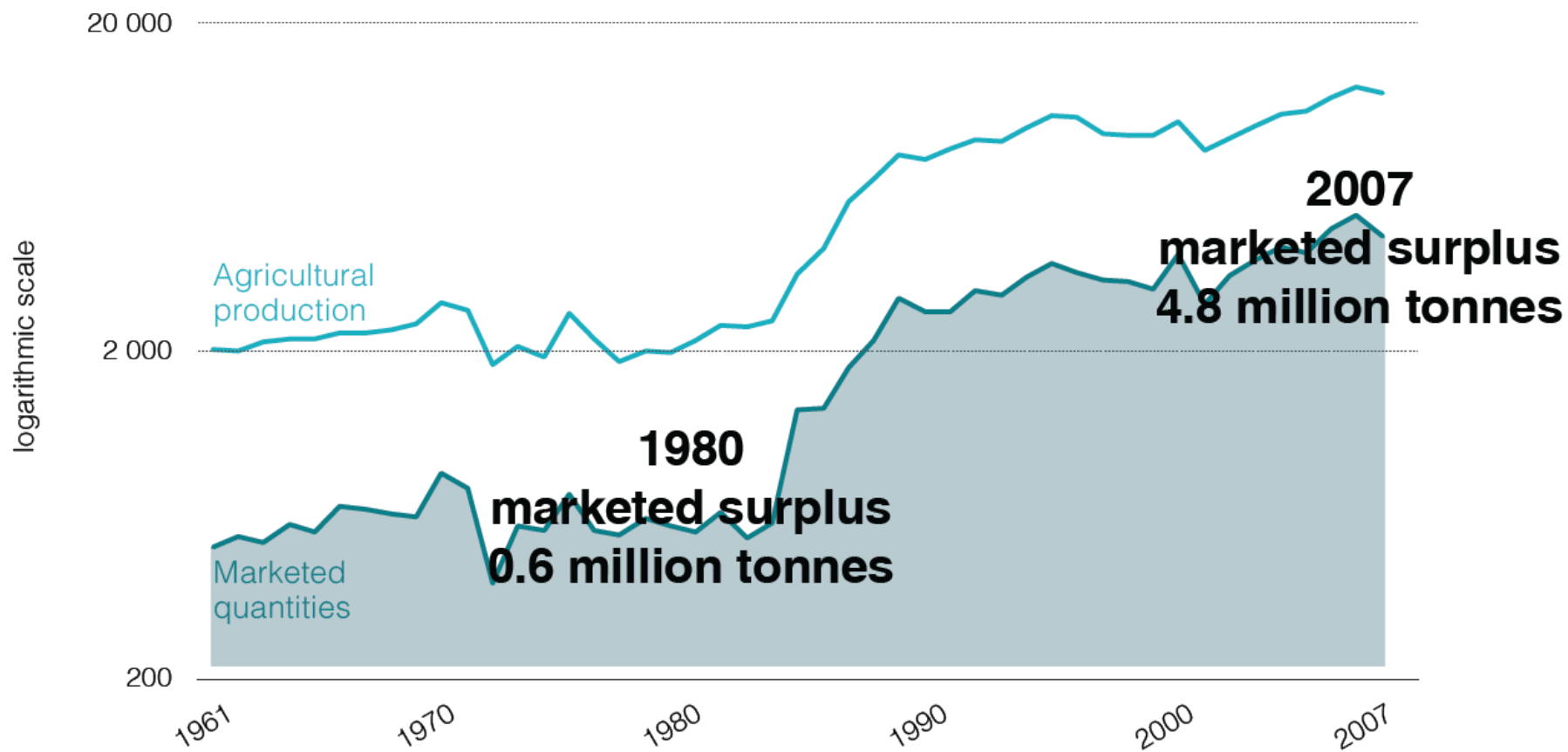


Sources: FAO 2012; SWAC/OECD 2012



# Marketed surplus - maize

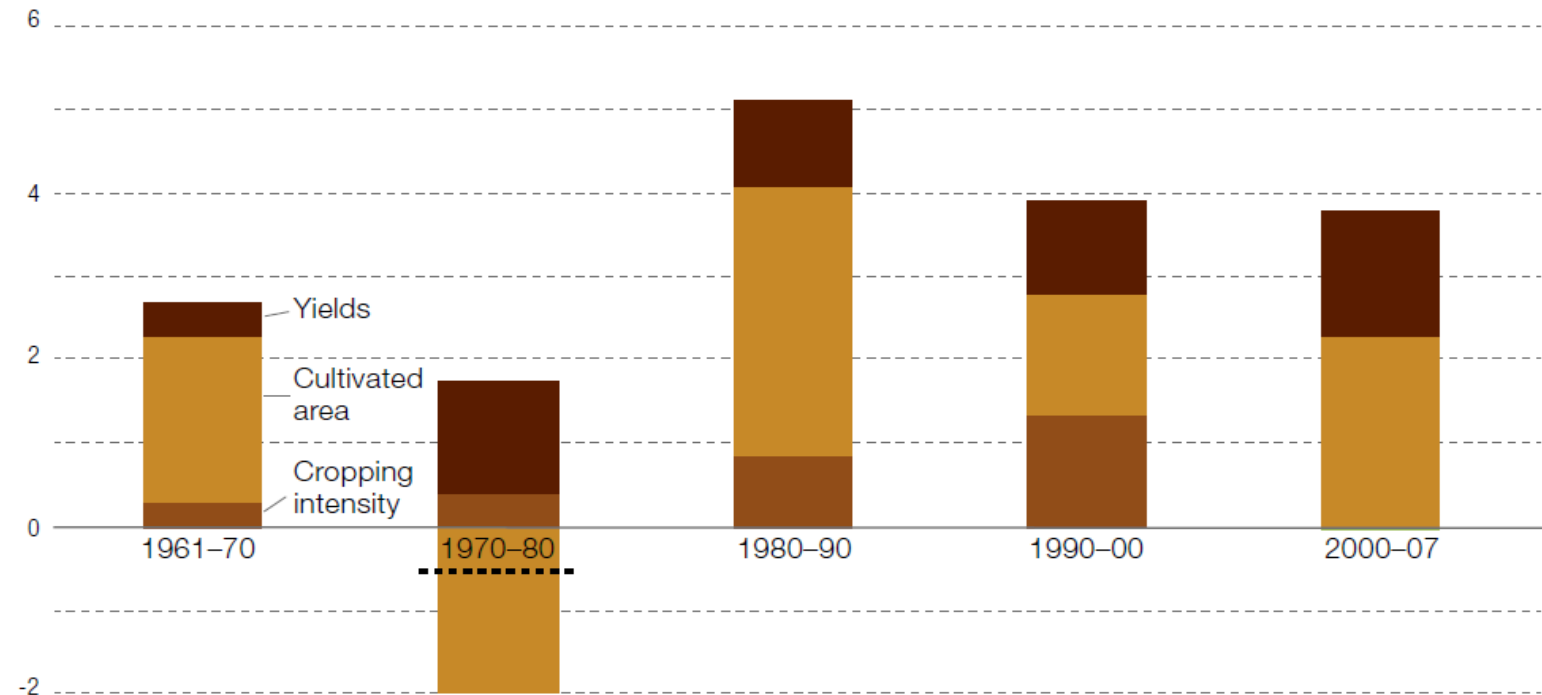
in thousand tonnes



Sources: FAO 2012; SWAC/OECD 2012

## Growth in production\* by factor

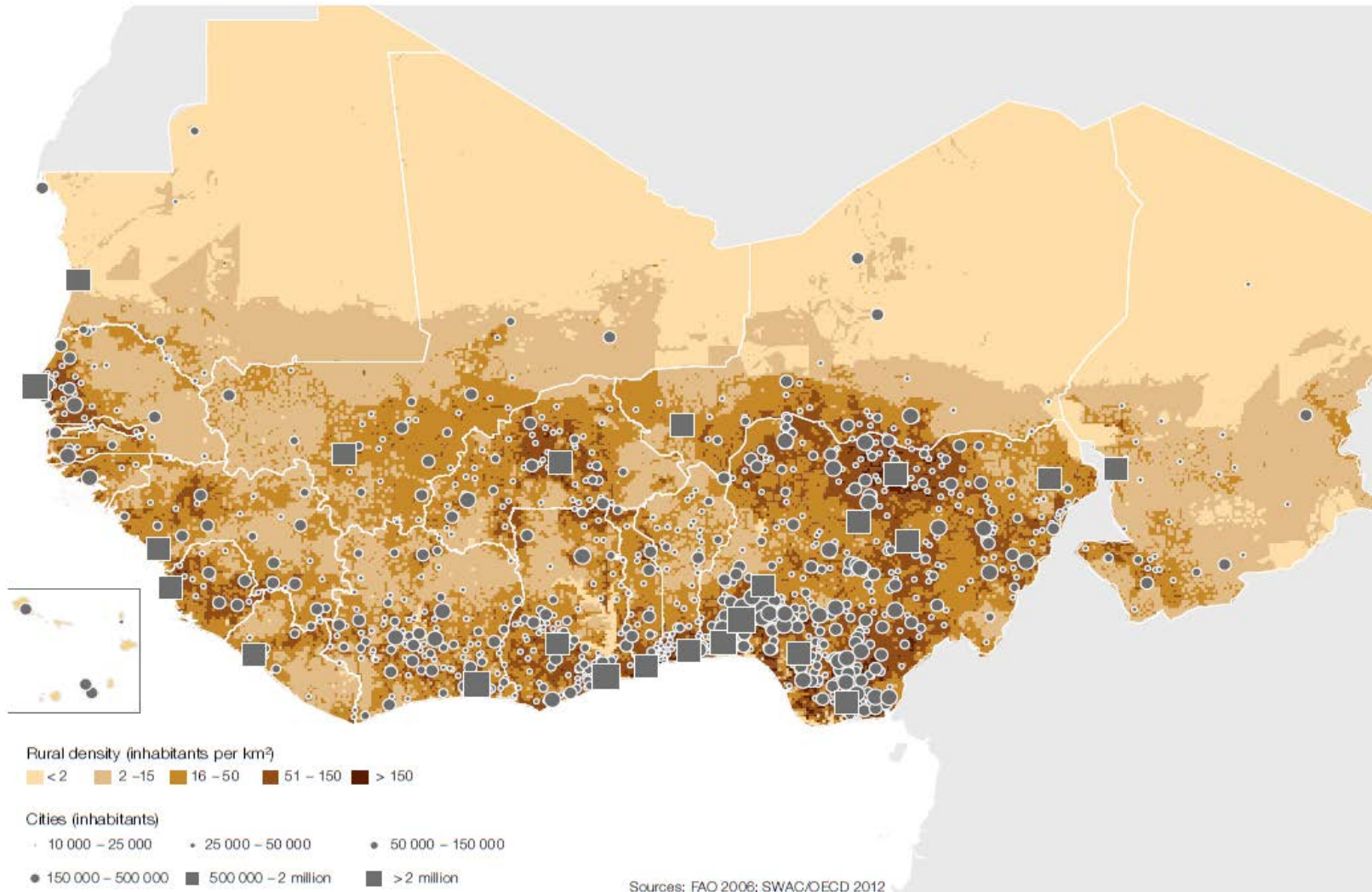
Average growth (%)



\* production in kcal  
Source: SWAC/OECD 2012

- Gains in yield have been particularly marked since 2000 and now account for **40% of production growth**

# Density and heterogeneity



# Further down the value chain

- Food GDP = 36% of GDP
- Food GDP/Agriculture GDP\* = 1.6
- Indicates major structural change in the food economy: **40% is no longer agriculture**

➔ **Post-harvest segments of the agro-food value chain as important to food security as agriculture**

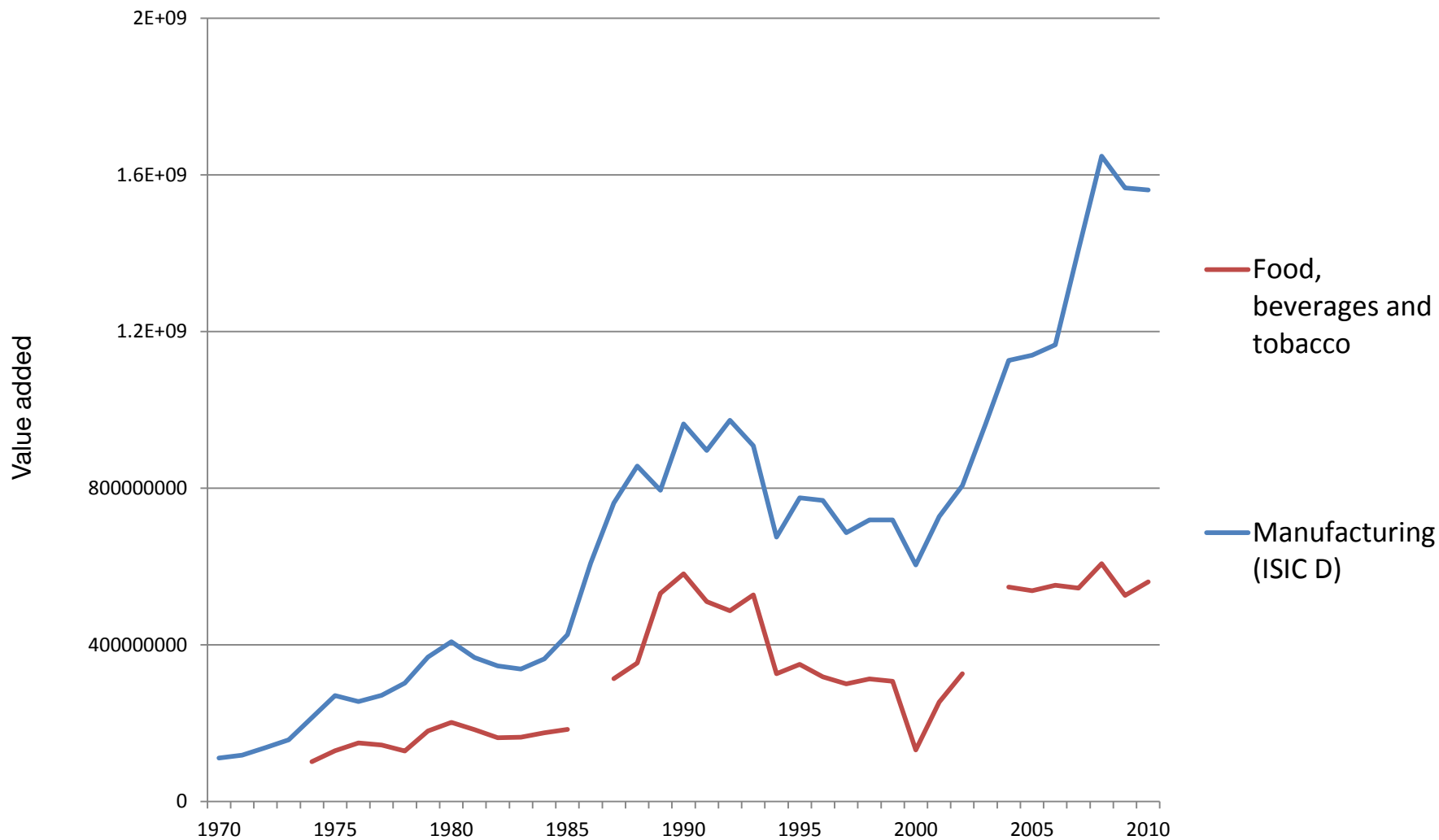
NB: \*Agriculture GDP adjusted for exports

- Processed foods (excluding cereals and beverages) account for **39% of food consumption** in 2010

		Beverages	Cereals*	Food (excluding Cereals & Beverages)	
				Unprocessed	Processed
<b>All</b>	<i>Lowest</i>	4%	31%	29%	36%
	<i>Low</i>	5%	20%	32%	42%
	<i>Middle</i>	9%	13%	31%	48%
	<i>Higher</i>	12%	11%	28%	49%
	<b>All</b>	<b>4%</b>	<b>27%</b>	<b>30%</b>	<b>39%</b>
<b>Urban</b>	<i>Lowest</i>	4%	24%	35%	38%
	<i>Low</i>	6%	18%	33%	44%
	<i>Middle</i>	9%	13%	31%	47%
	<i>Higher</i>	12%	11%	28%	49%
	<b>All</b>	<b>5%</b>	<b>20%</b>	<b>33%</b>	<b>41%</b>
<b>Rural</b>	<i>Lowest</i>	3%	37%	25%	35%
	<i>Low</i>	5%	25%	31%	39%
	<i>Middle</i>	7%	14%	29%	50%
	<i>Higher</i>	12%	19%	30%	38%
	<b>All</b>	<b>4%</b>	<b>34%</b>	<b>26%</b>	<b>36%</b>

Sources: World Bank, GCD 2014; SWAC/OECD 2015

# Growth in food processing (Senegal)



Source: UNIDO, INDSTAT 2013

- **Markets play a crucial role** in food security, both in urban and rural areas
- Market dynamics are transforming agriculture towards **more intensification**, in particular around urban areas
- **Post-harvest segments of the agro-food value chains are fundamental to food security**

➔ **What is the potential of the regional food processing and marketing sectors?**  
**What are the opportunities and constraints?**





**Africapolis – 2015 update – database available at:**

**<http://stats.oecd.org/>**

>> [click] *Demography and Population*

>> [click] *West African Statistics*

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