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# *Improving Food Security in Eastern Africa Through Greater Intra-regional Trade – A Review of the Issues*

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Improving Food Security in Eastern Africa  
Through Greater Intra-Regional Trade  
– A Review of the Issues

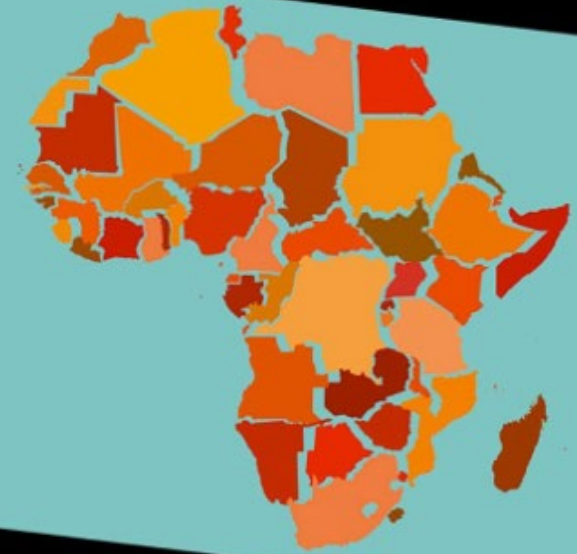


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# BORDERLESS AFRICA

A Sceptic's Guide  
to the Continental  
Free Trade Area



FRANCIS MANGENI & ANDREW MOLD

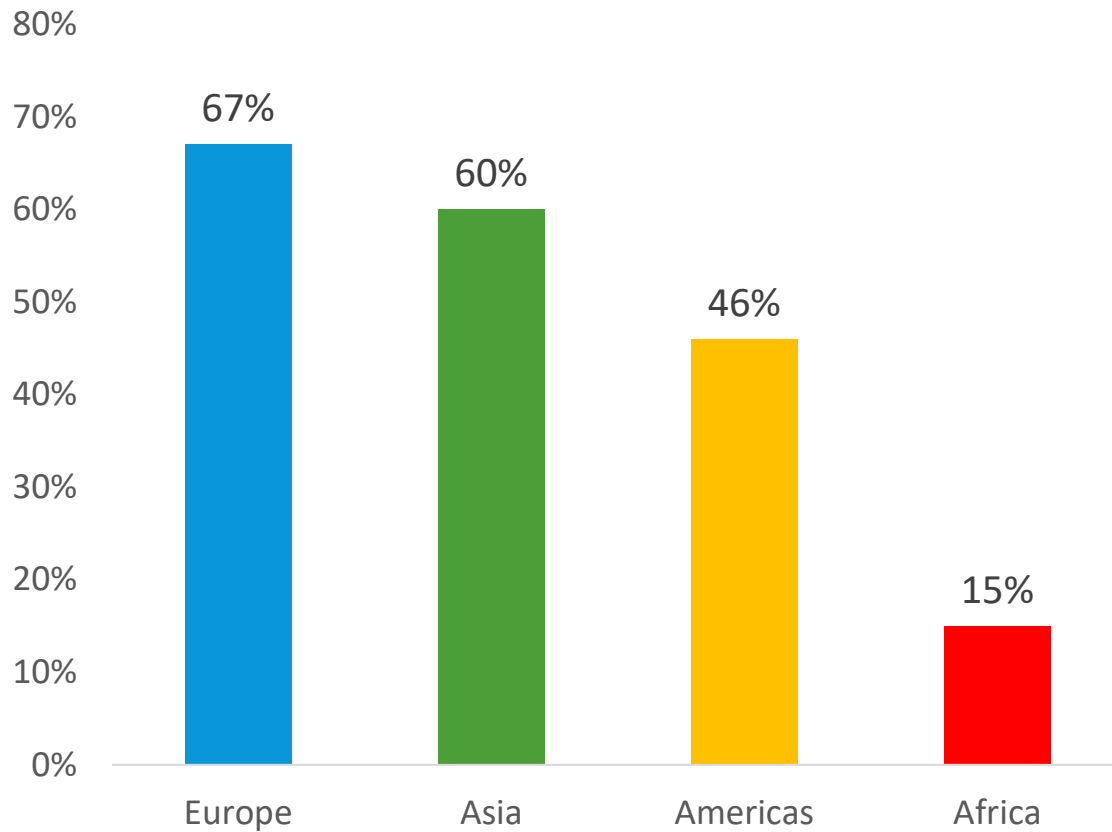


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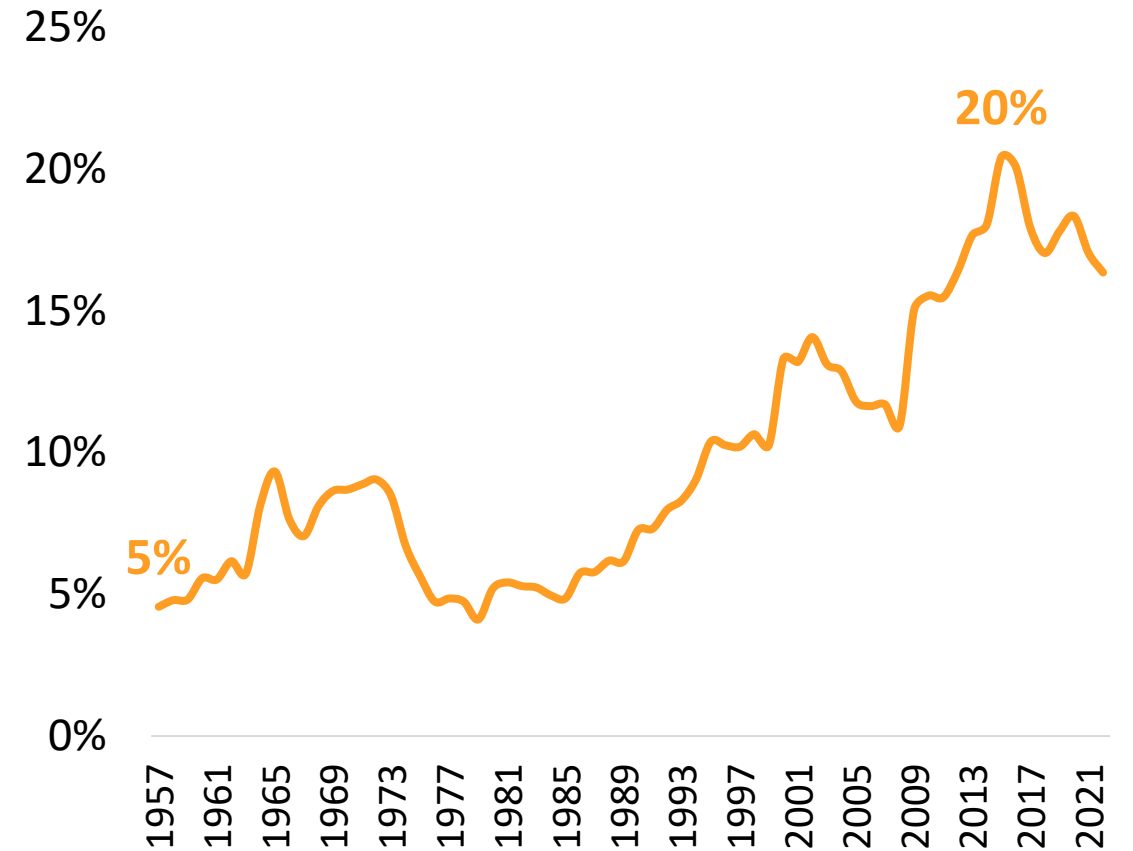
IdeastoAction

# Getting the narrative (very) wrong...

## Intra-regional Trade Shares, 2019

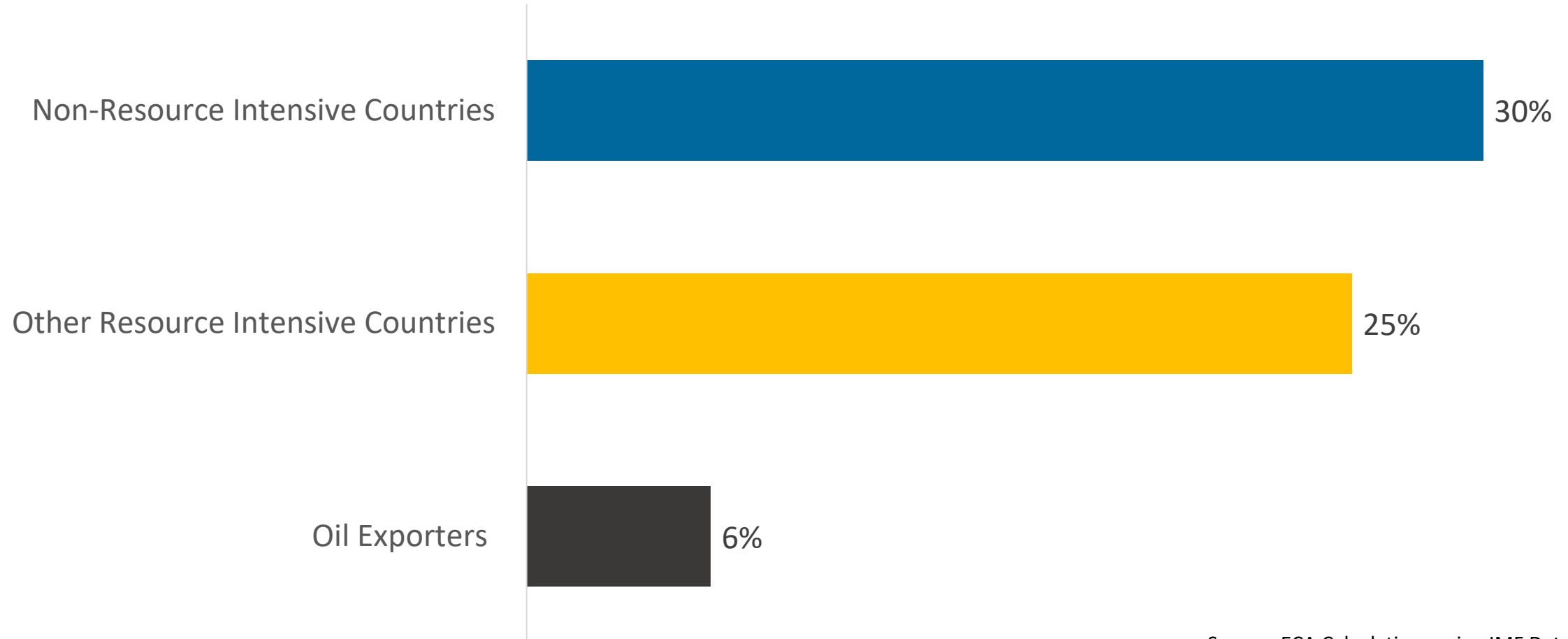


## Intra-African Exports as % of Total Exports, 1957-2022



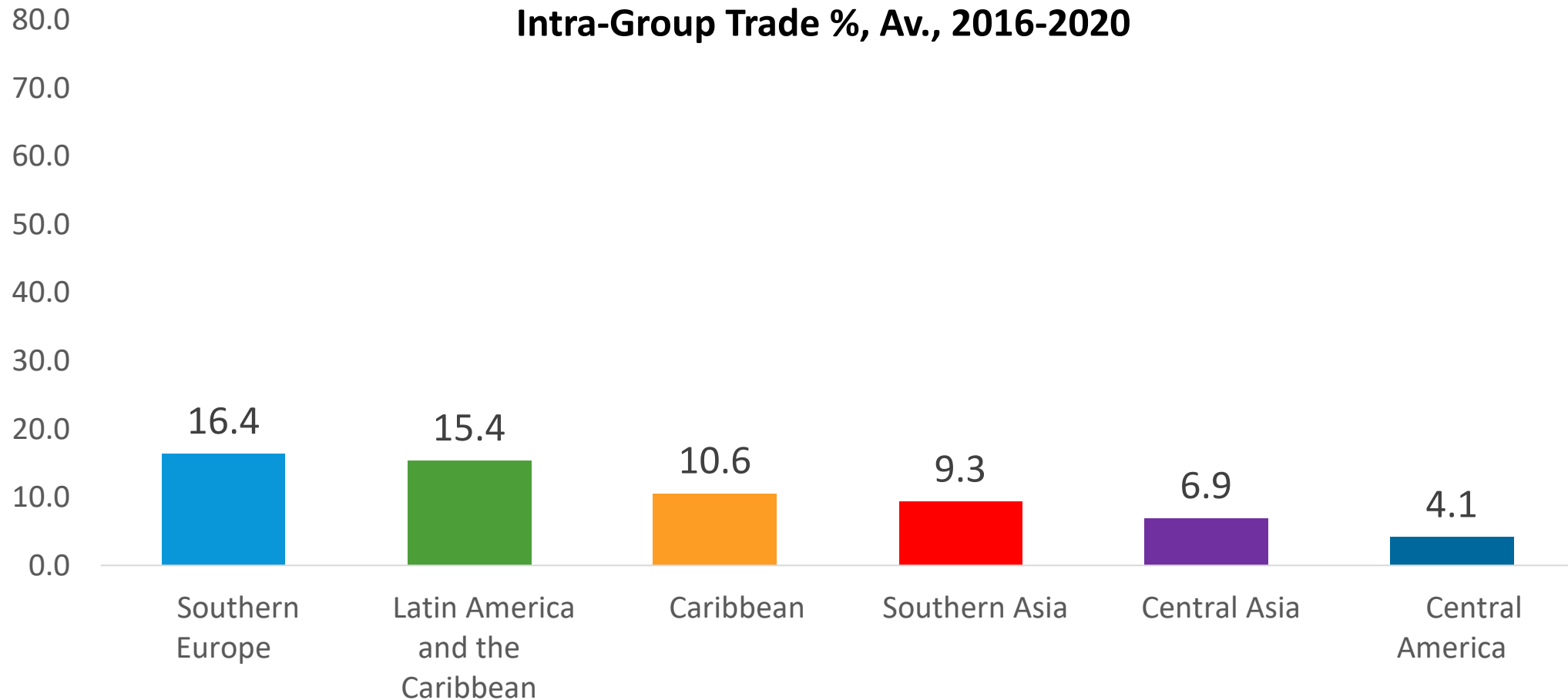
# None of this is true... Exhibit 1

% Share of exports to Africa, by resource-wealth classification, 2024



Source: ECA Calculations using IMF Data 2025

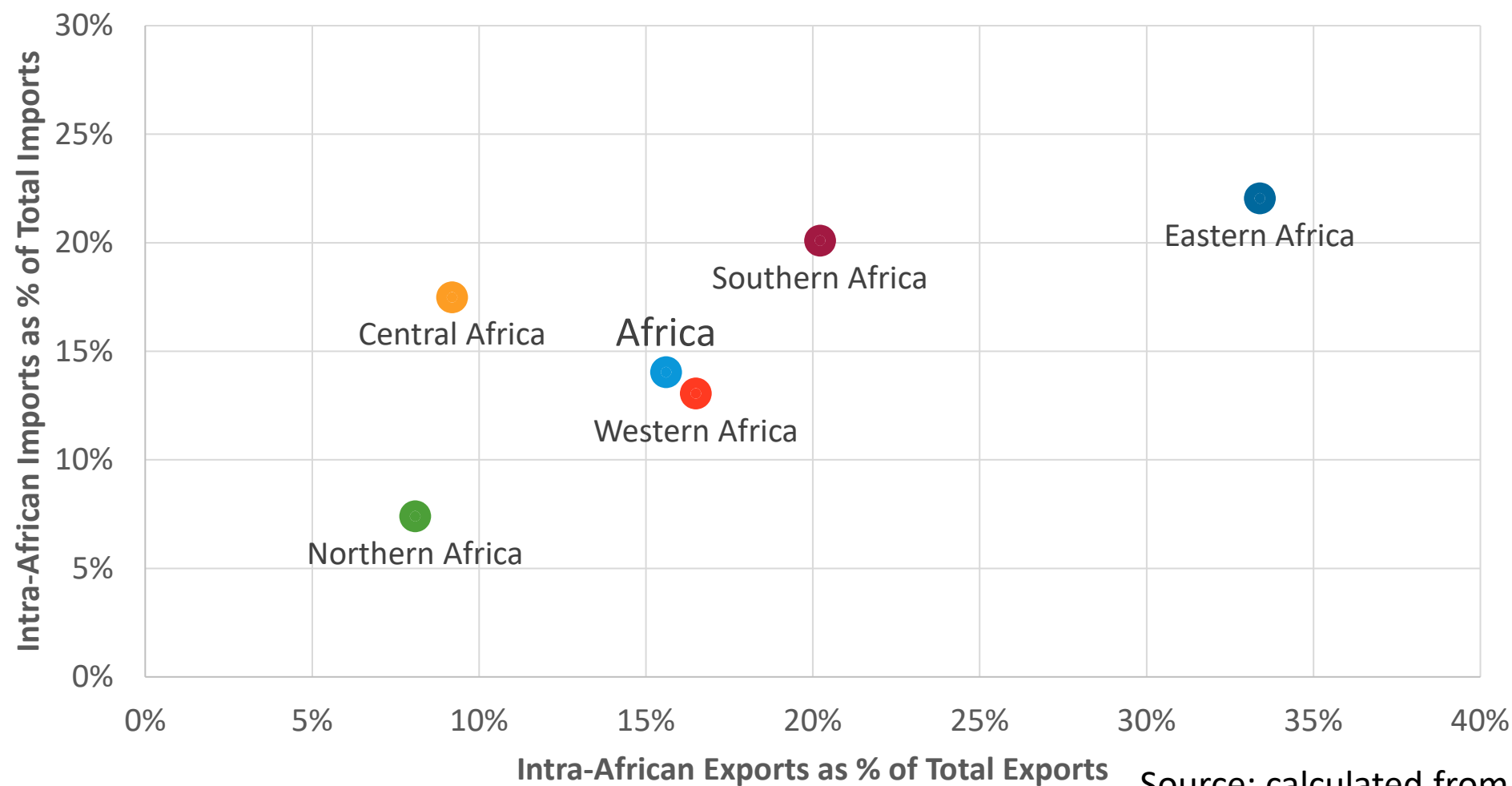
# None of this is true... Exhibit 2



Source: Mangeni and Mold, 2024, Chapter 8.

# None of this is True - Exhibit 3

Intra-African Trade as % of Total Trade, 2019-2021 average

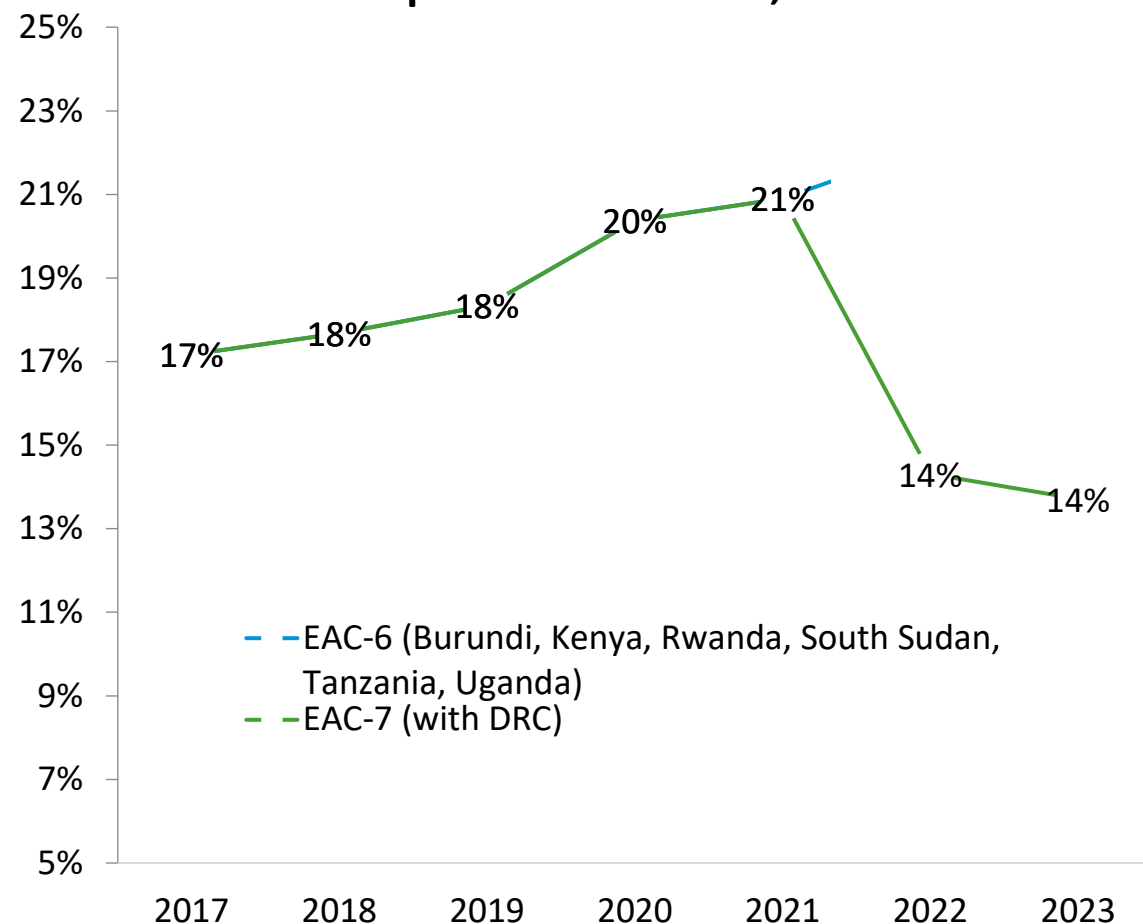


Source: calculated from UNCTADStat data



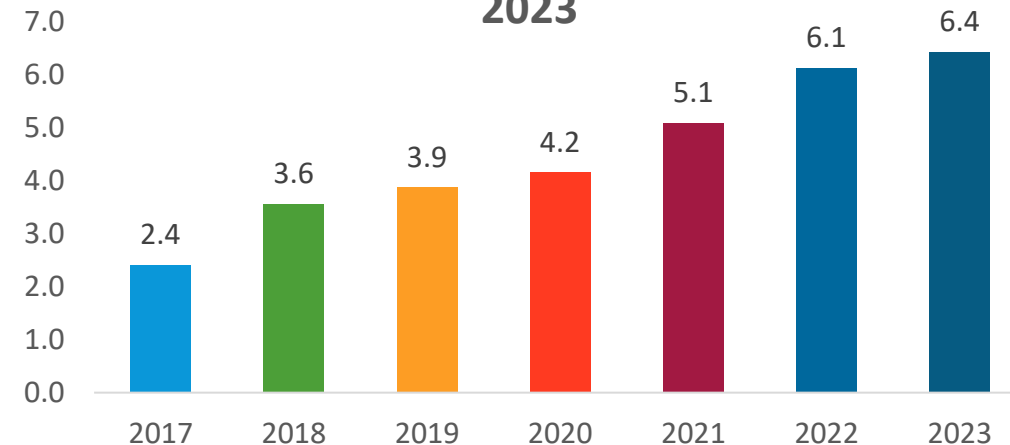
# Exhibit 4...Stagnating Intra-EAC Trade?

## Intra-EAC Exports as % of Total, 2017-2023



Source: calculated from UNCTADStat data

## EAC-7 Exports (exclud. reexports), 2017-2023



Source: EAC official data

## EAC's invisible walls: Why intra-trade remains stubbornly at 15pc

FRIDAY, JUNE 13, 2025 - 4 min read



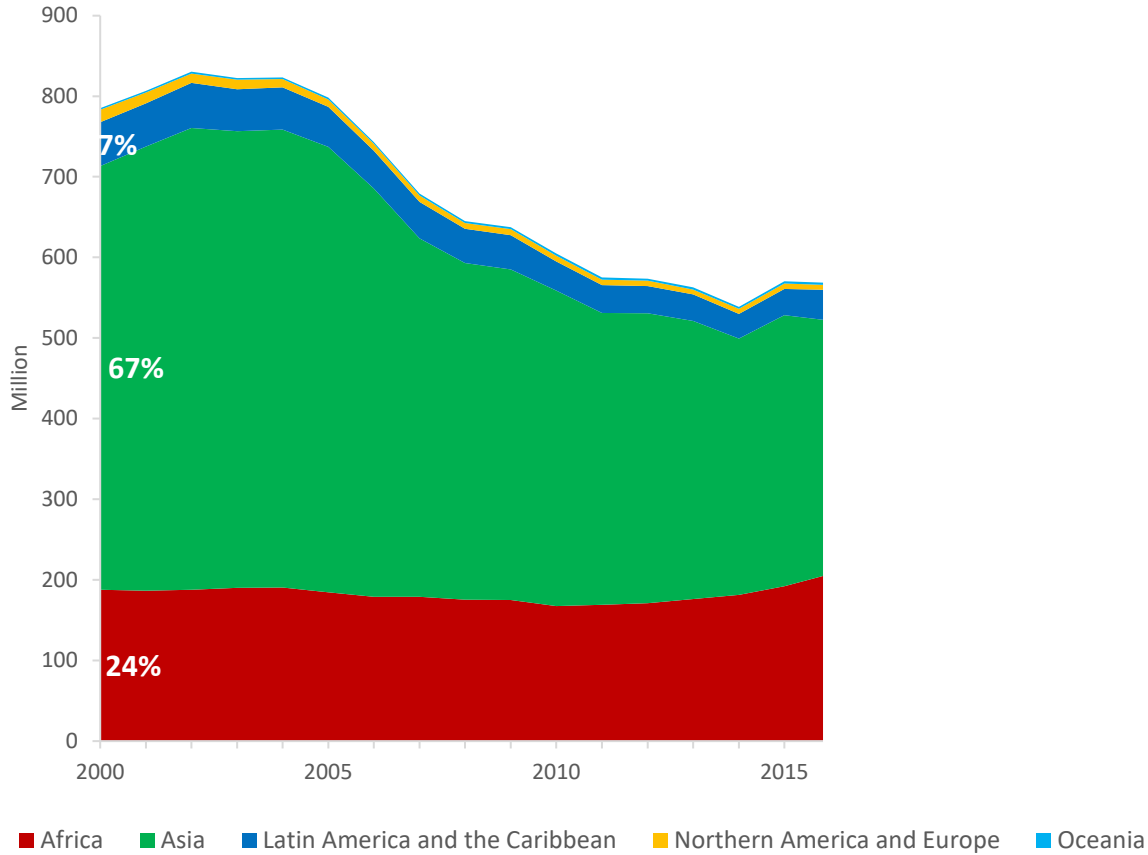
# Context and Challenges for African Food Security





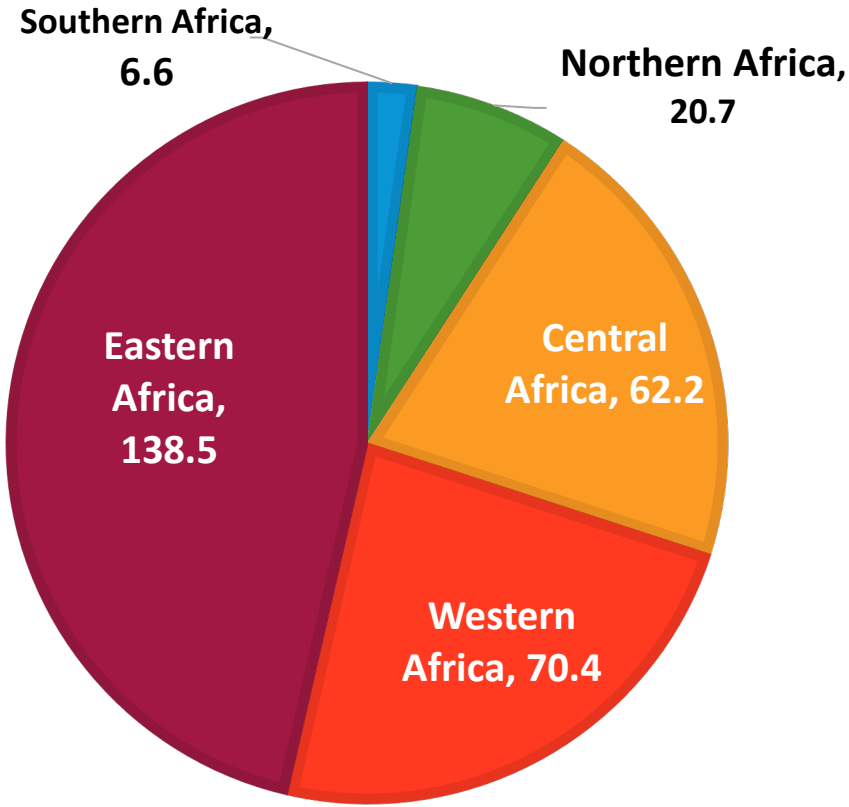
# Food Security Crisis in Africa... a growing crisis?

Number of Undernourished People by Region, 2000-2023



Source: FAO Statistical Yearbook, 2024

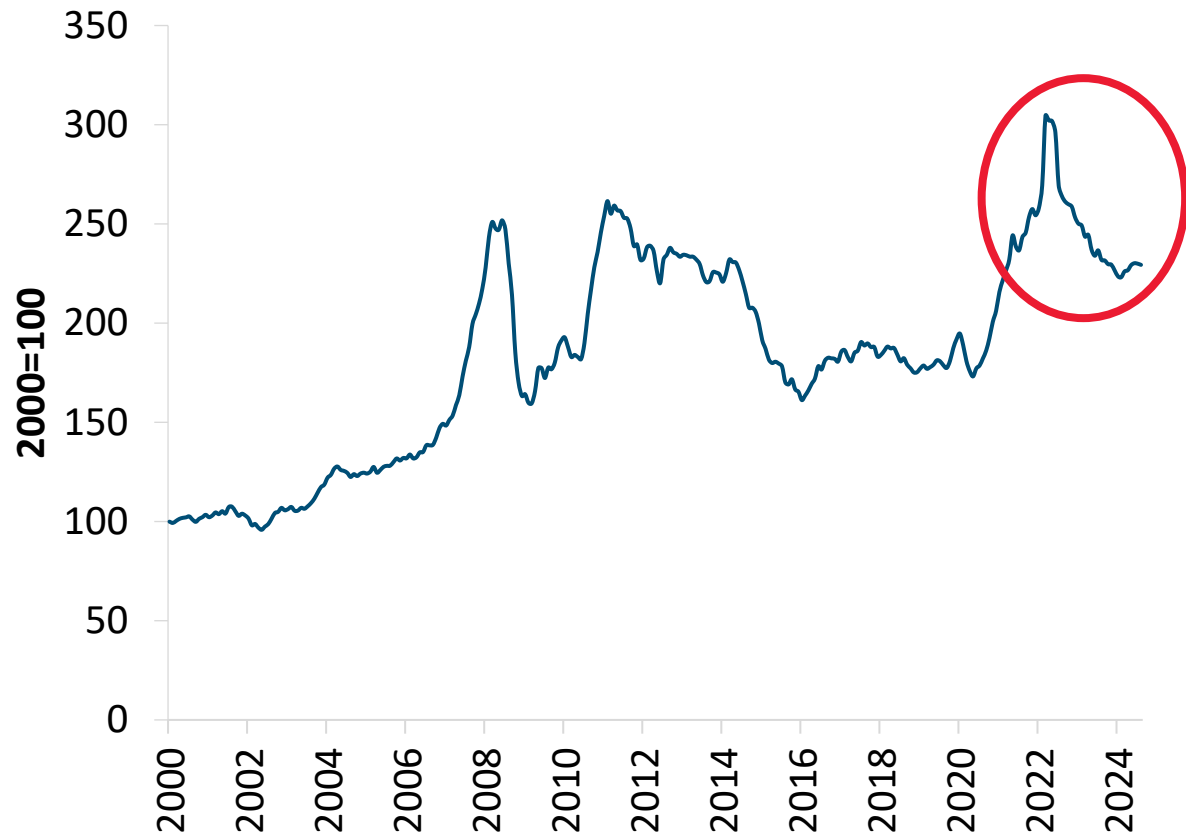
Number of Undernourished People in Africa 2023, by Sub-Region (millions)



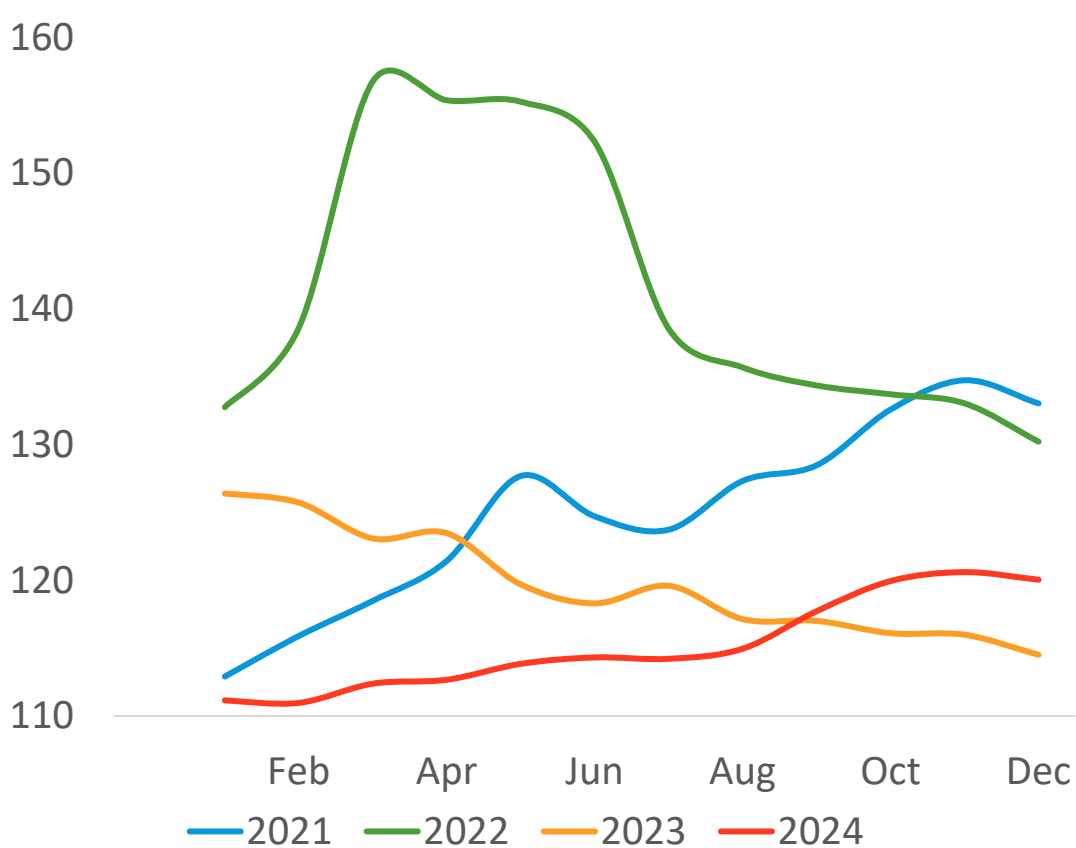
Source: FAO et al., 2024

# Prices have risen markedly for international food stuffs

Real Food Price Index, 2000-2024

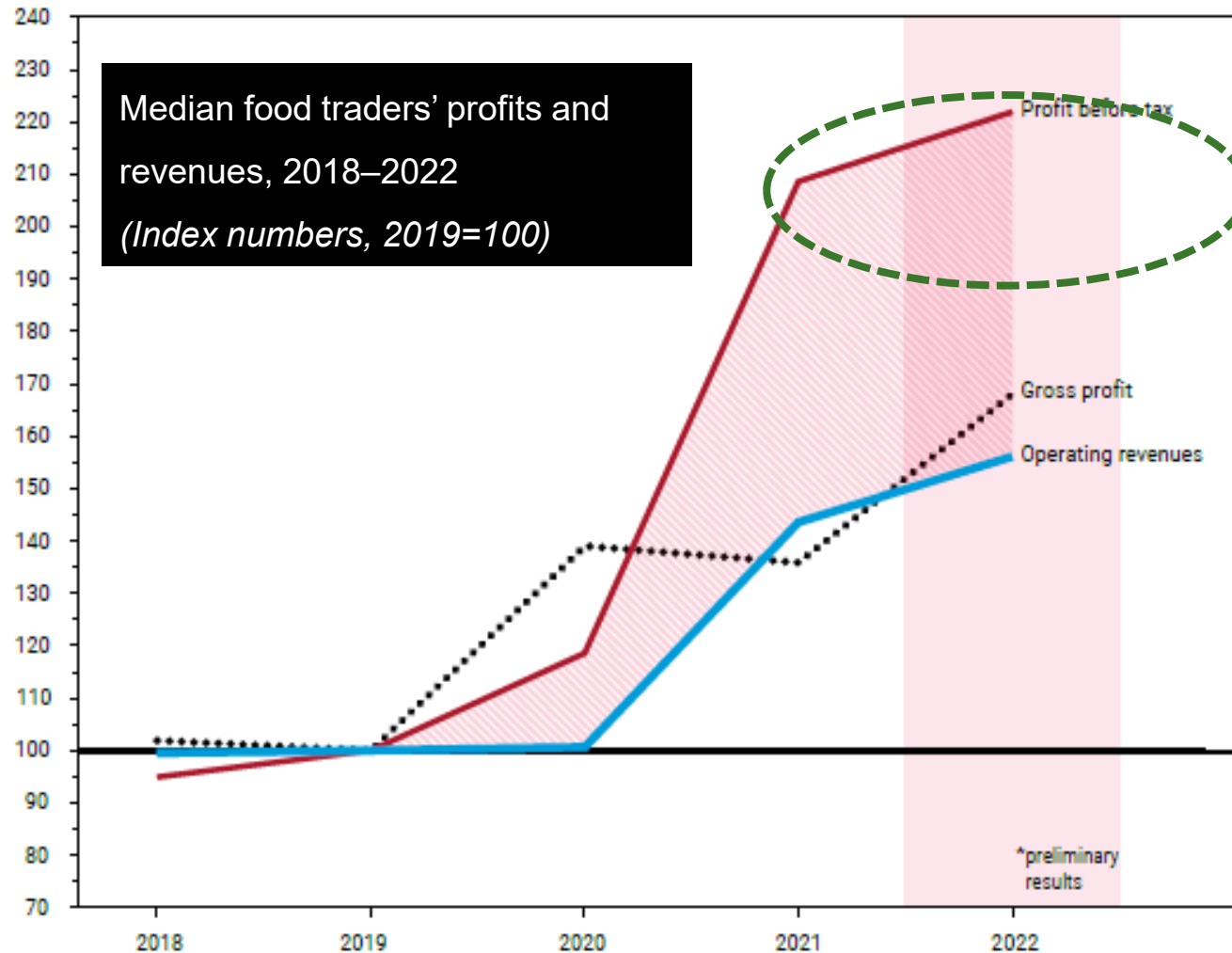


Monthly Food Price Index, 2021-2024\*



Source: FAO database 2025

# Declining global prices are not necessarily being passed on...



Source: UNCTAD (2023) Trade and Development Report Update

Four companies – Cargill, Archer Daniels Midland, Bunge and Louis Dreyfus – control an estimated 90 per cent of the global grain trade

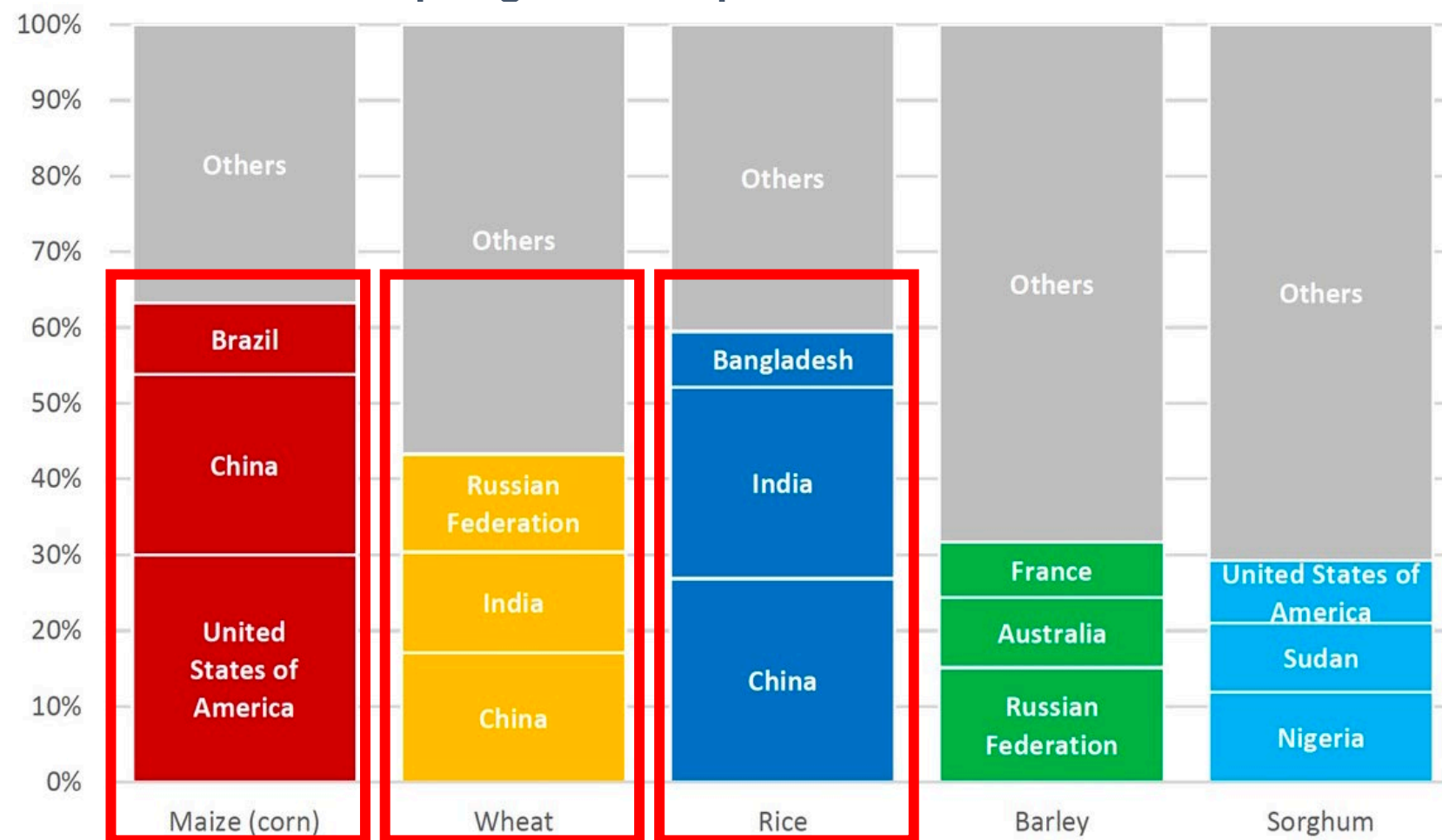
Source: Monbiot (2022)

Changes in corporate profits and margins are a significant driver of inflation. In the US, UK, Australia, and Spain studies have found that 54%, 59% , 60% and 83% of inflation, respectively, was caused by increased profits.

Source: Oxfam (2023)

# Alarming concentration in global food production

Top largest cereal producers in 2022



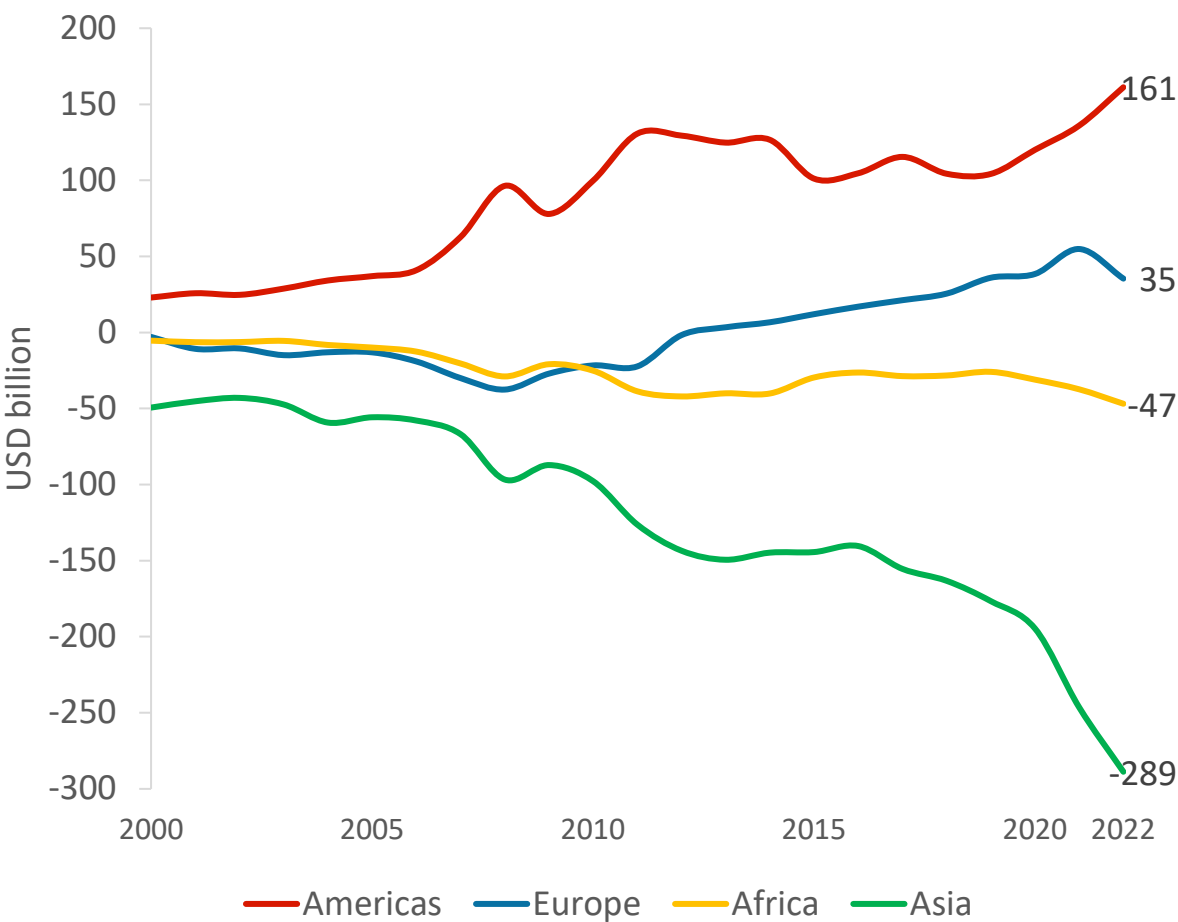
Global food production has **increased by 56%** since 2000, **yet food security remains a challenge** due to trade dependencies and supply chain risks.

**A few key players dominate** global food production and trade, creating vulnerabilities.

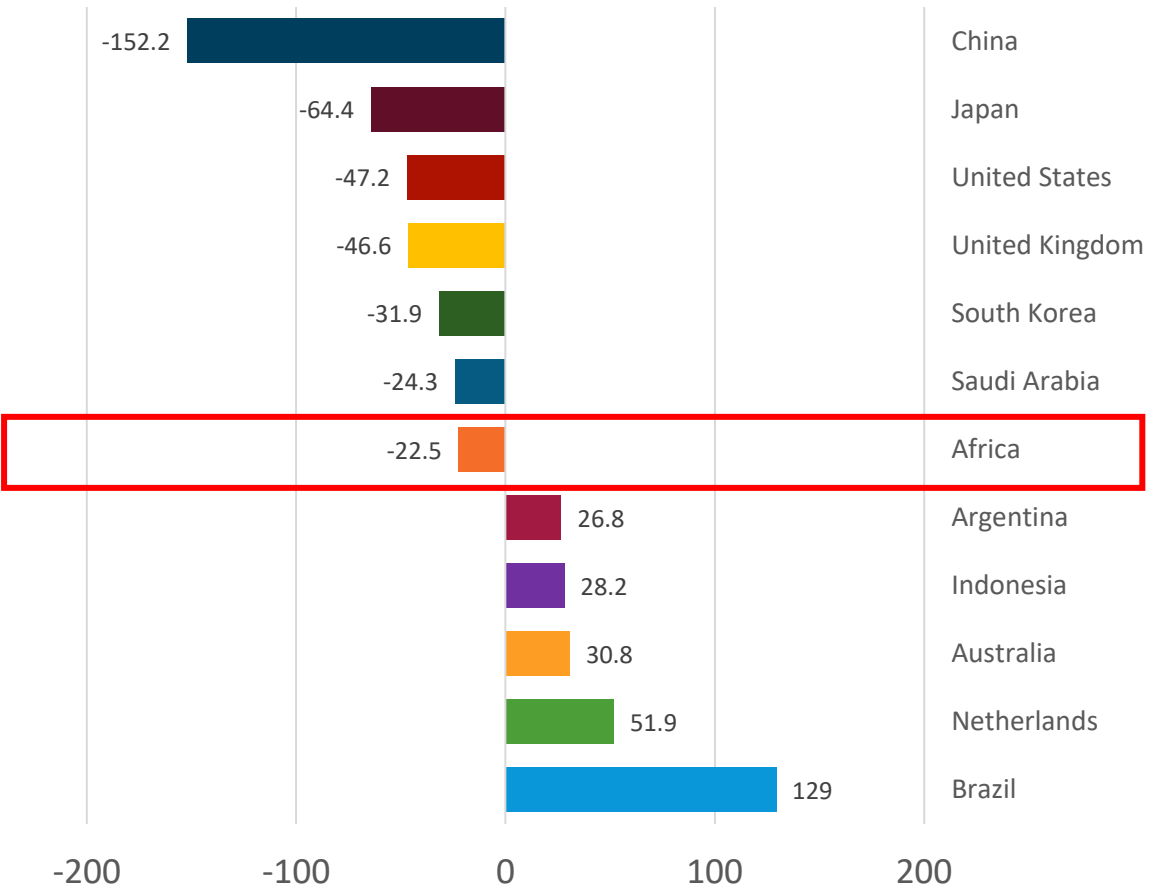
Source: FAOSTAT Analytical Brief 79 Agricultural Production Statistics 2000–2022

# Africa does NOT sustain the largest food trade deficits...

Food net trade by region (billions USD), 2000-2022



World's Largest Net Food Exporters/Importers, 2023 (blns USD)



Source: FAO et al., 2024

# **Where does Eastern Africa stand?**

## **The data behind food production and trade**

## Food trade deficits are highly concentrated geographically...

### Net Food Trade Balance, Average 2017- 2021 (USD Millions)



## Regional Trends...

**Northern, Central & Western Africa → Net importers**

**Southern Africa** → Near trade balance

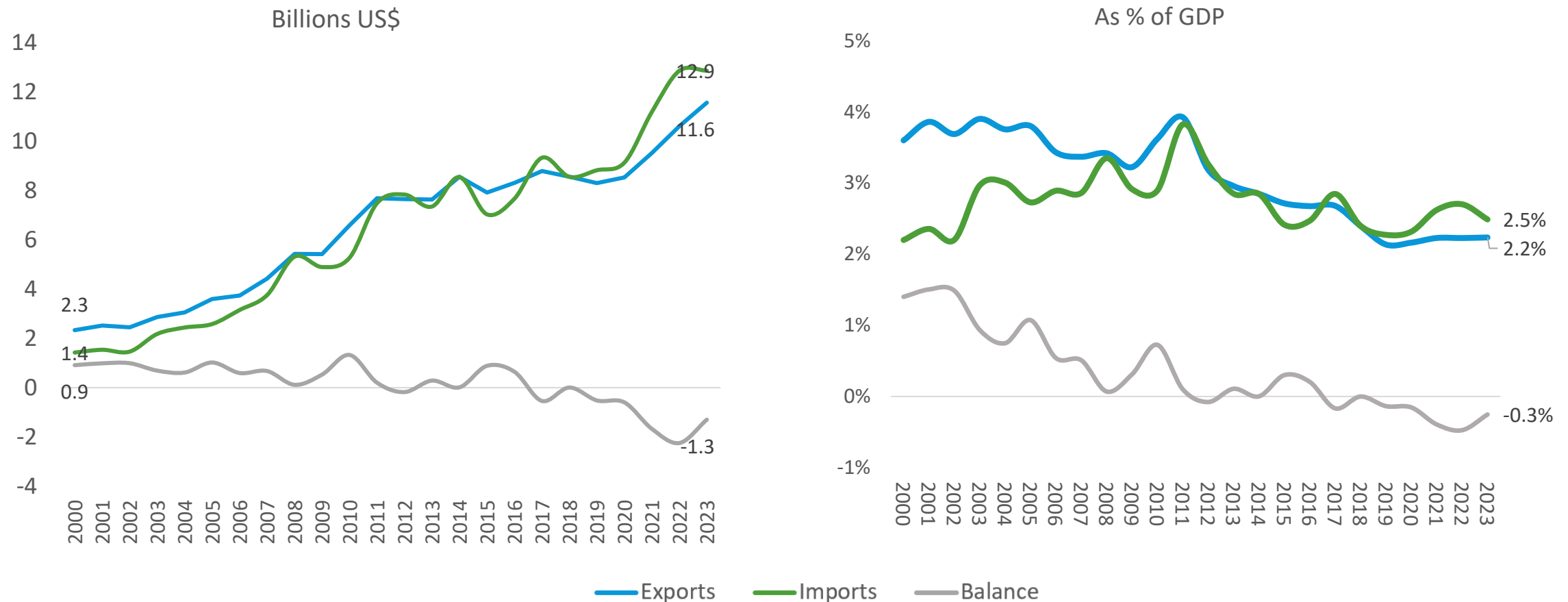
## And Eastern Africa?

Source: ECA calculations using UNCTADStat, 2023



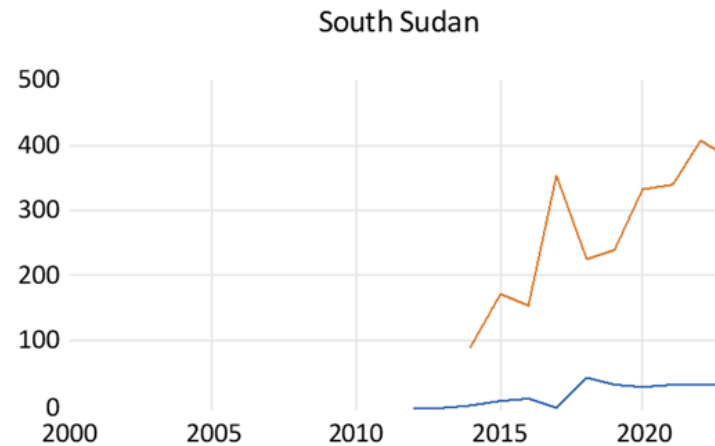
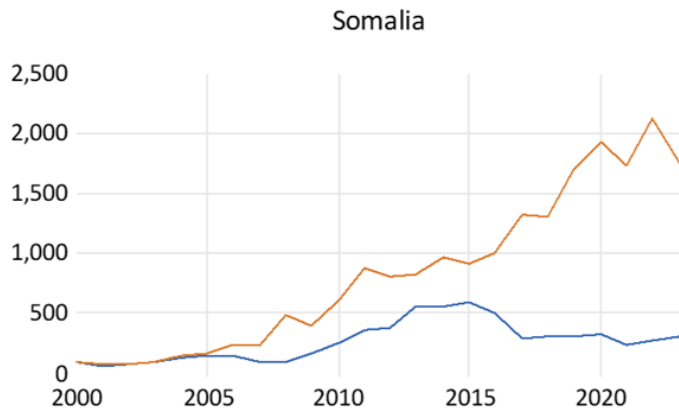
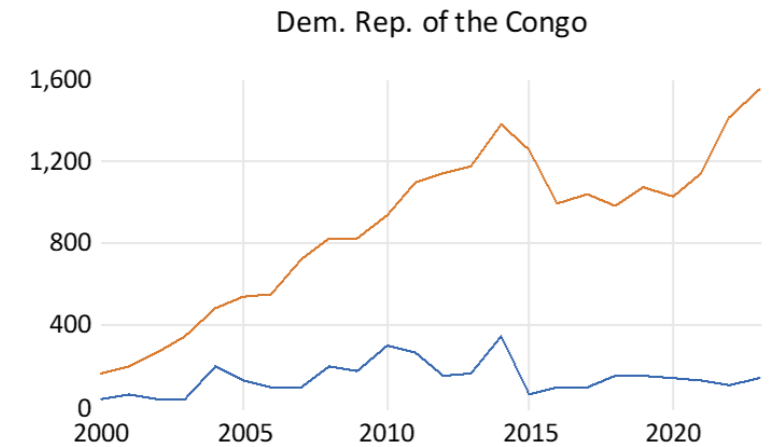
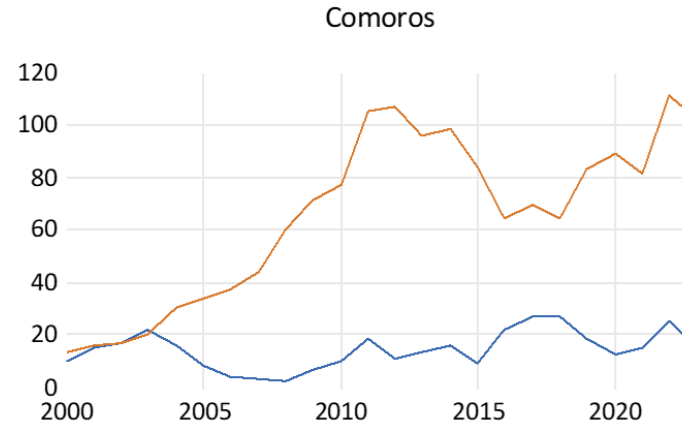
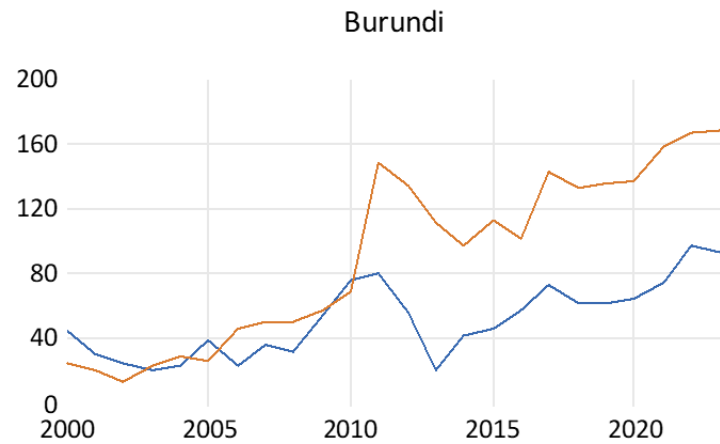
# And collectively East Africa is not far from food security...

Eastern African-14 Food Exports and Imports, billions USD and as % of GDP, 2000-2023



Source: ECA, elaborated from UNCTADStat data (2024)

# Most food importer dependent...

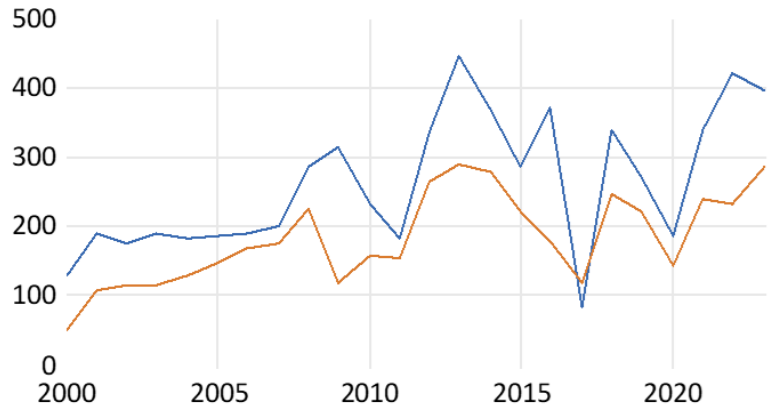


These countries have a **persistent food trade deficit**, relying heavily on imports to meet domestic demand.

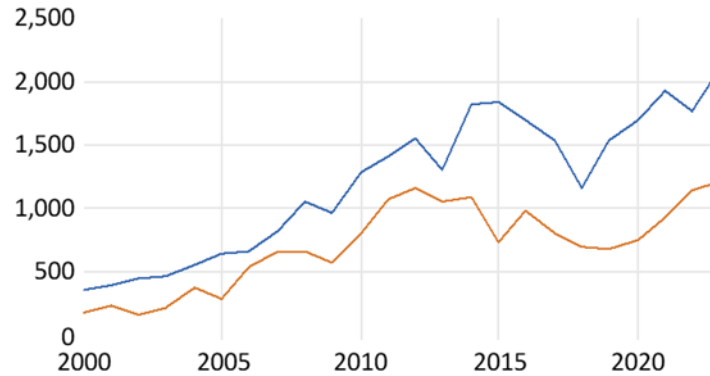
— Exports — Imports

# The leading food exporting countries...

Seychelles

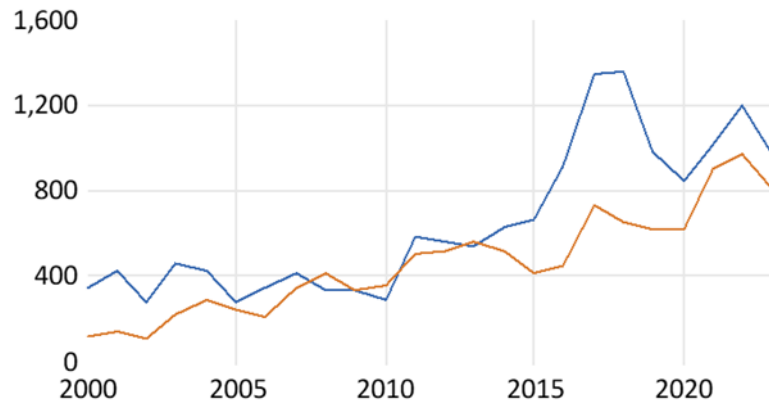


United Republic of Tanzania

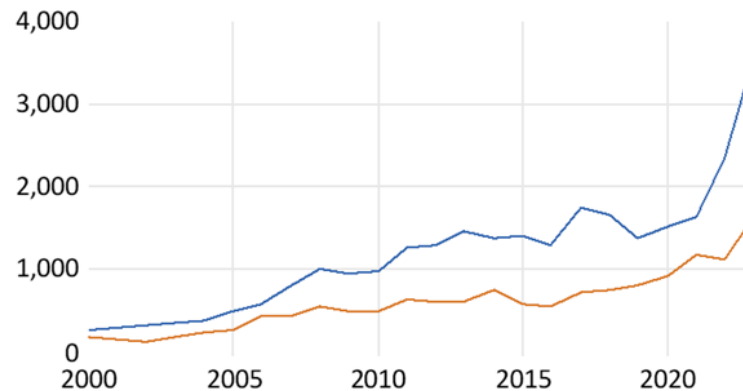


These countries have **consistently maintained a positive food trade balance**, exporting more than they import.

Madagascar



Uganda

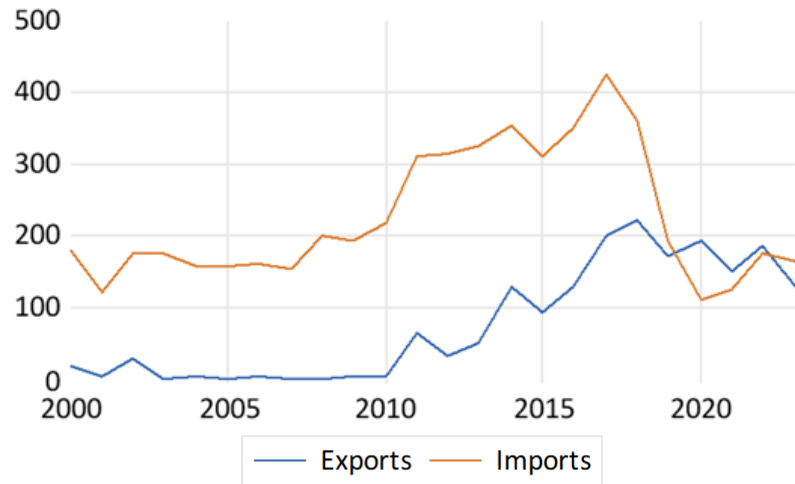


Madagascar and Uganda, in particular, show strong export performance, while Seychelles exhibits some fluctuations but remains a net exporter overall.

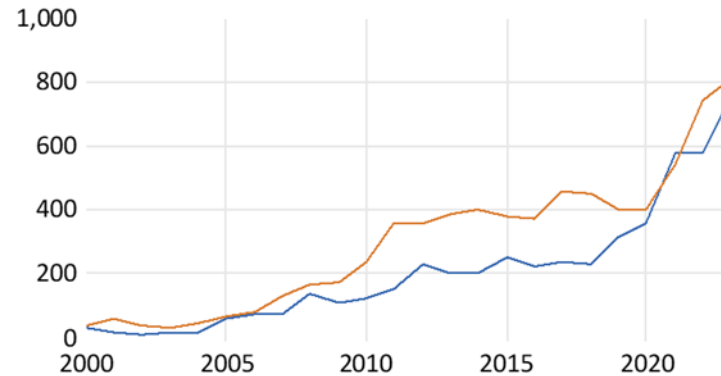
— Exports — Imports

# Countries nearing food trade equilibrium

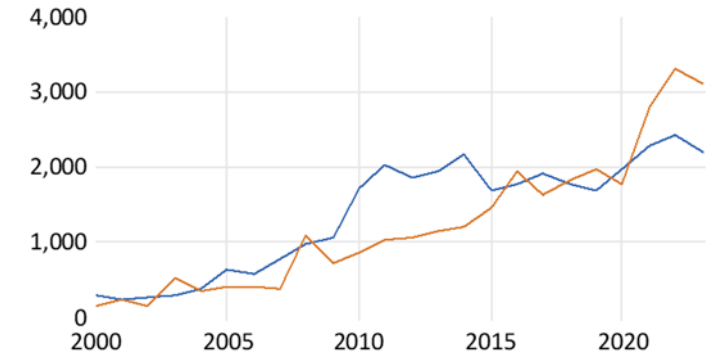
Eritrea



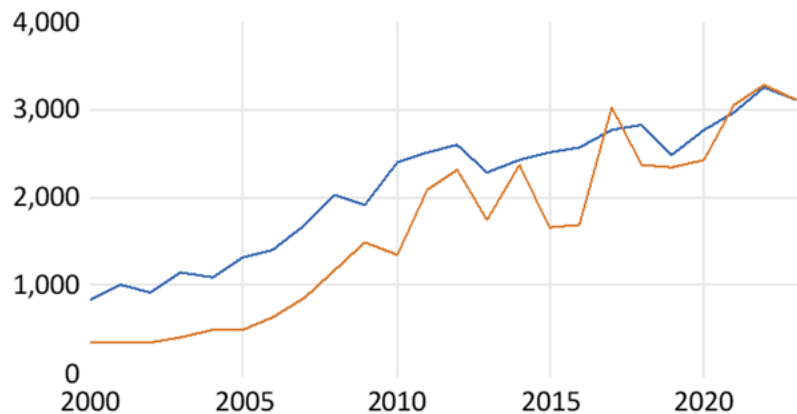
Rwanda



Ethiopia



Kenya



Kenya and Ethiopia are two countries which have tended to have balanced food trade or small surpluses in the past, but since the period of the pandemic both countries have tipped into in the red.

# Let's not forget informal cross-border trade...

1.2 million metric tons, including...



408,000 tons of maize;



300,000 tons of beans;



252,000 tons of rice;



96,000 tons of sorghum;



and 144,000 tons of other foods, including cooking bananas, groundnuts, millet, and cassava

(Study of 2011-2012 on 36 East African Border Crossings FSNWG, 2012)

# Eastern Africa is not the most food import dependent region...

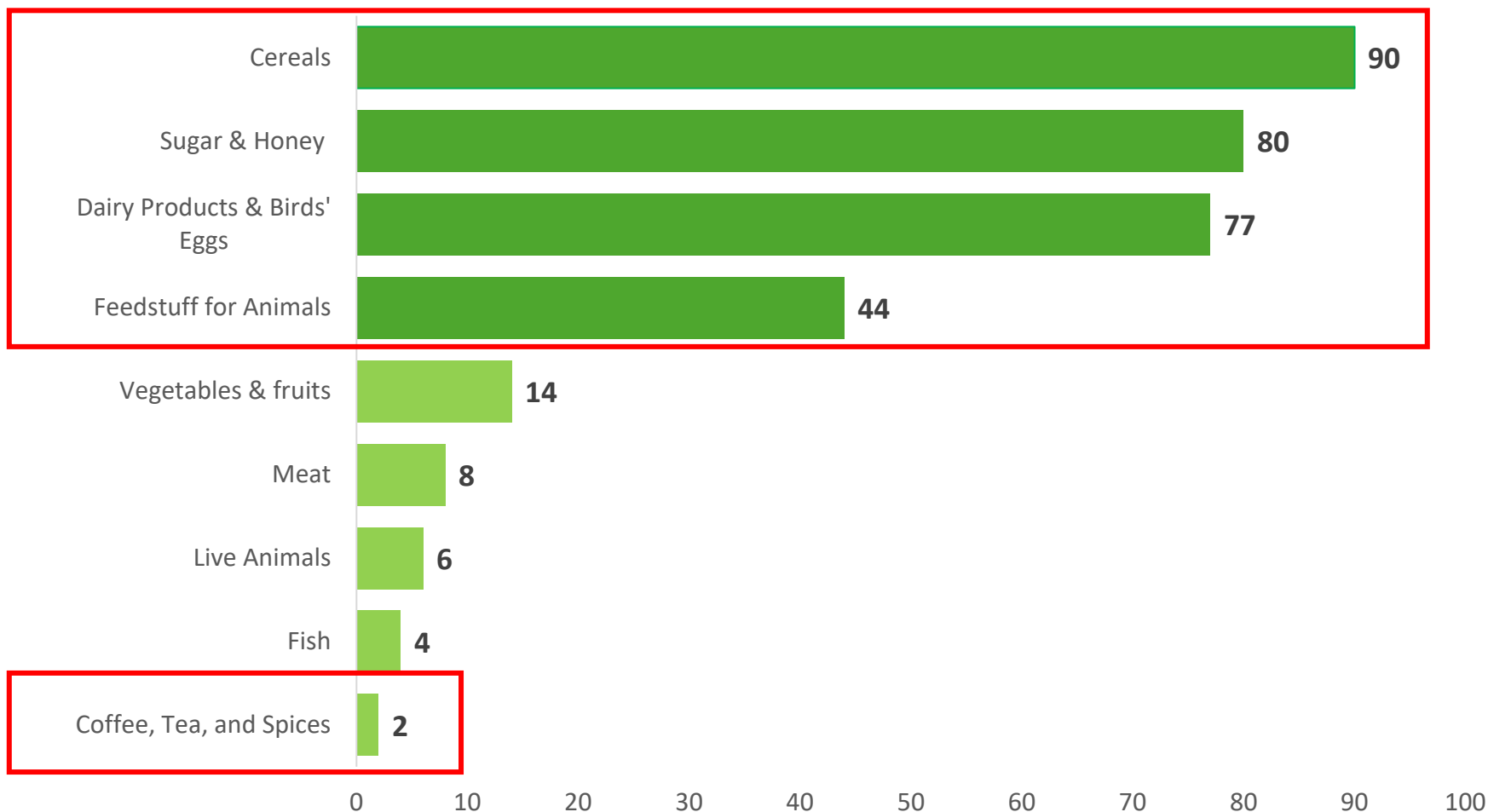
## Africa's Sub-Regional Import Dependency Ratios (Percentage)

	AFRICA TOTAL	NORTHERN AFRICA	EASTERN AFRICA	CENTRAL AFRICA	SOUTHERN AFRICA	WESTERN AFRICA
Vegetable oils	71	78	86	44	74	60
Cereals, excluding beer	33	54	19	34	32	24
Meat	12	8	2	34	16	13
Milk, excluding butter	9	14	2	9	10	9
Pulses	8	52	5	5	42	1
Oil crops	7	29	2	0	14	1
Vegetables	3	1	4	5	11	5
Fruits, excluding wine	3	4	2	1	15	2
Eggs	2	0	3	40	1	3
Starchy roots	0	4	0	5	5	0

Source: AUC & FAO Framework document, 2021

# What drives intra-regional food trade in Eastern Africa?

Intra-regional food exports by product (as % of total exports), Eastern African, 2017-2021



Cereals dominate Eastern Africa's intra-regional food trade, while high-value exports like coffee, tea, and fish remain low.

Source: ECA calculations using UNCTAD database, 2023



# Cash Crops and Export Dependency in Eastern Africa

Main Eastern African food exporter by products (\$million), Annual Average 2017-2021

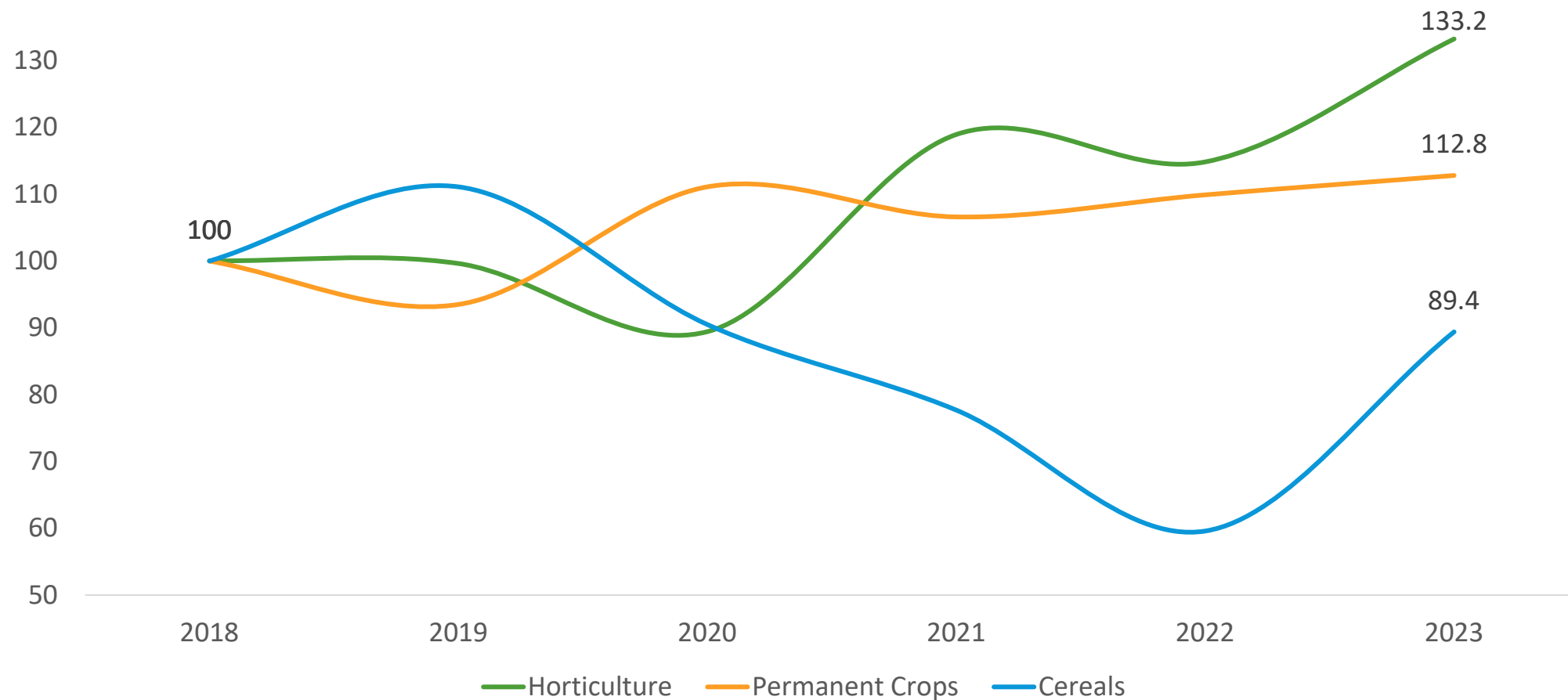
Coffee, tea & spices		Veg & Fruits		Fish		Live Animals		Sugar	
Kenya	1,497	Kenya	622	Seychelles	275	Somalia	189	Uganda	91
Ethiopia	1,140	Tanzania	504	Madagascar	142	Djibouti	107	Kenya	50
Madagascar	848	Ethiopia	394	Uganda	140	Ethiopia	27	Djibouti	35
Uganda	753	Eritrea	126	Tanzania	139	Tanzania	13	Ethiopia	8
Tanzania	263	Djibouti	111	Eritrea	119	Kenya	9	Rwanda	8

Created with Datawrapper

Source: ECA calculations using UNCTAD database, 2023

# Cash Crops vs. Food crops? The Kenyan example...

Quantum Indices of Kenyan Agricultural Production, 2018-2023



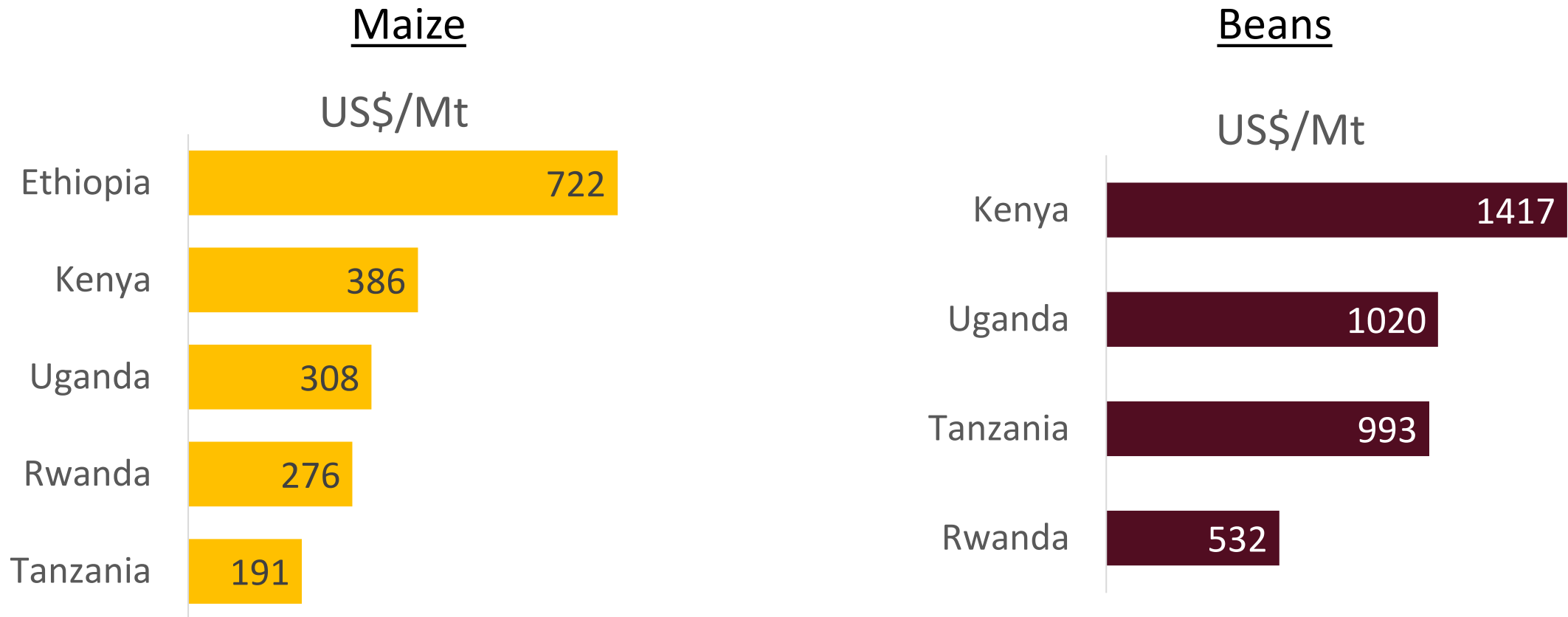
\* Provisional. Data refers to fresh horticultural exports only

Source: Kenyan National Bureau of Statistics (KNBS), June 2025

# Can the AfCFTA Transform Eastern Africa's Food Security?

# Price divergencies in different East African markets are LARGE

National average price spreads across select East African Countries, June 2024

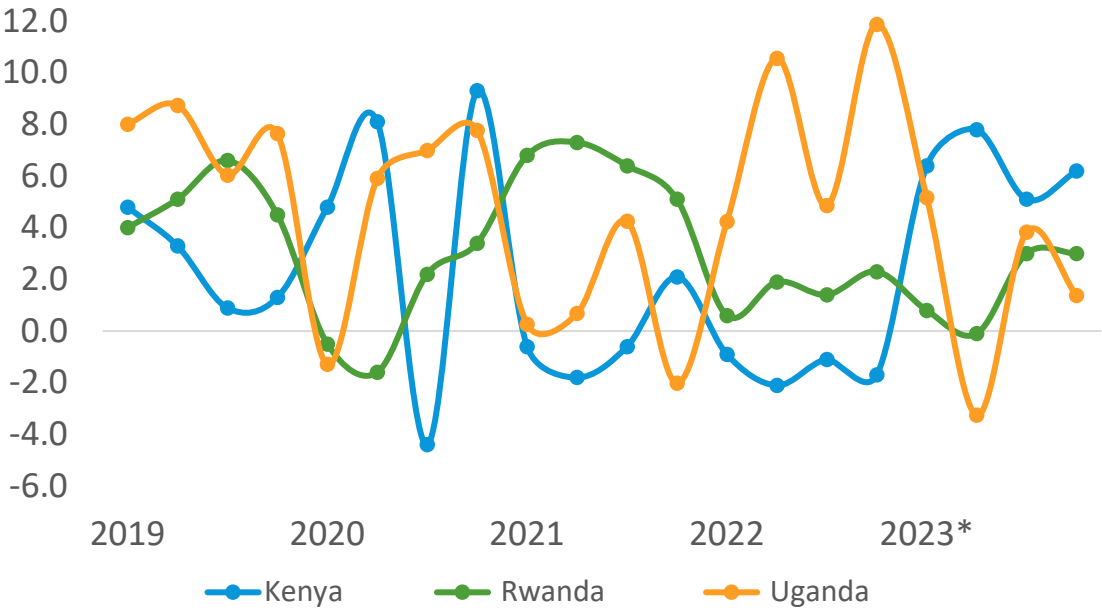


Source: AGRA (2024), Food Security Monitor, Edition 48, June 2024

# Food production cycles across Eastern Africa are poorly synchronized... hinting a large gains from great intra-regional trade

Agricultural GDP growth rates among EAC countries are weakly correlated, meaning regional trade could help stabilize food supplies.

Quarterly Growth Rates of Agricultural GDP, 2019Q1-2023Q4



Pearson's Correlation Matrix for Agricultural Quarterly GDP Growth, 2019-2023

	Kenya	Rwanda	Uganda	Tanzania
Kenya		-0.37	-0.23	0.06
Rwanda	-0.37		0.00	-0.01
Uganda	-0.23	0.00		0.14
Tanzania	0.06	-0.01	-0.02	

Sources: For Kenya, KNBS (June 2024), for Rwanda, NISR, for Uganda and Tanzania, Central Banks and ECA calculations

Given Eastern Africa’s diverse agroecological conditions, stronger regional trade policies could help smooth supply disruptions and reduce price volatility, benefiting both producers and consumers.

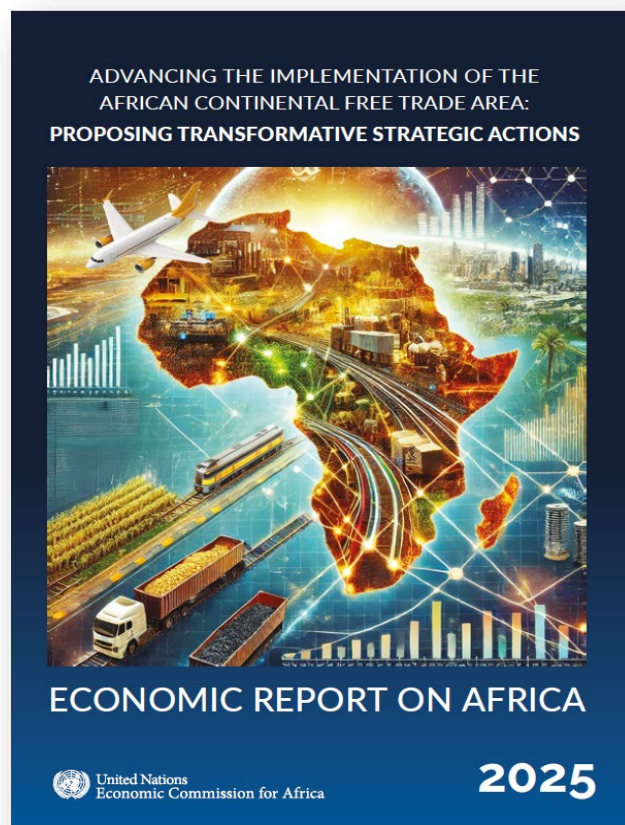
# Impact of Existing African RTAs on Agricultural Exports – An Econometric Analysis

On average, existing African RTAs led to a modest 15% increase in intra-regional agricultural exports (UNECA, 2025).

Afesorgbor (2016) carried out a careful meta-analysis combining 14 previous studies covering the period from 1980–2006; and found that, on average, the formation of African regional blocs boosted bilateral trade by about 27–32%.

	(1)	(2)
	OLS(FE)	PPML(FE)
log GDP Exporter	0.381*** (0.044)	
log GDP Importer	0.456*** (0.049)	
Log distance	-0.833*** (0.070)	-0.061*** (0.005)
Common border	2.176*** (0.173)	0.155*** (0.012)
Common language	0.737*** (0.080)	0.062*** (0.006)
Colony	1.333*** (0.266)	0.077*** (0.018)
WTO Member	0.519*** (0.168)	0.056*** (0.014)
African RTA	1.469*** (0.122)	0.138*** (0.010)
Constant	4.494*** (0.815)	3.001*** (0.047)
Exporter- FE	Yes	
Importer-FE	Yes	
Exporter-year FE	No	Yes
Importer-year FE	No	Yes
Number of Obs	68193	71759
R-squared	0.464	
Pseudo R-Squared		0.0824

# But the AfCFTA's Impact could be much larger



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Intra-African trade following implementation of AfCFTA, as compared to baseline (i.e. without AfCFTA), %, 2045

Sector	Variation	
	USD billion	%
Non-processed agri-food	11.0	51.3
Processed agri-food	47.6	61.9

Source: ECA and CEPII (forthcoming)



# Intra-regional food traders still face high tariffs...

Simple average tariff rates on agricultural products, 2016 (%)

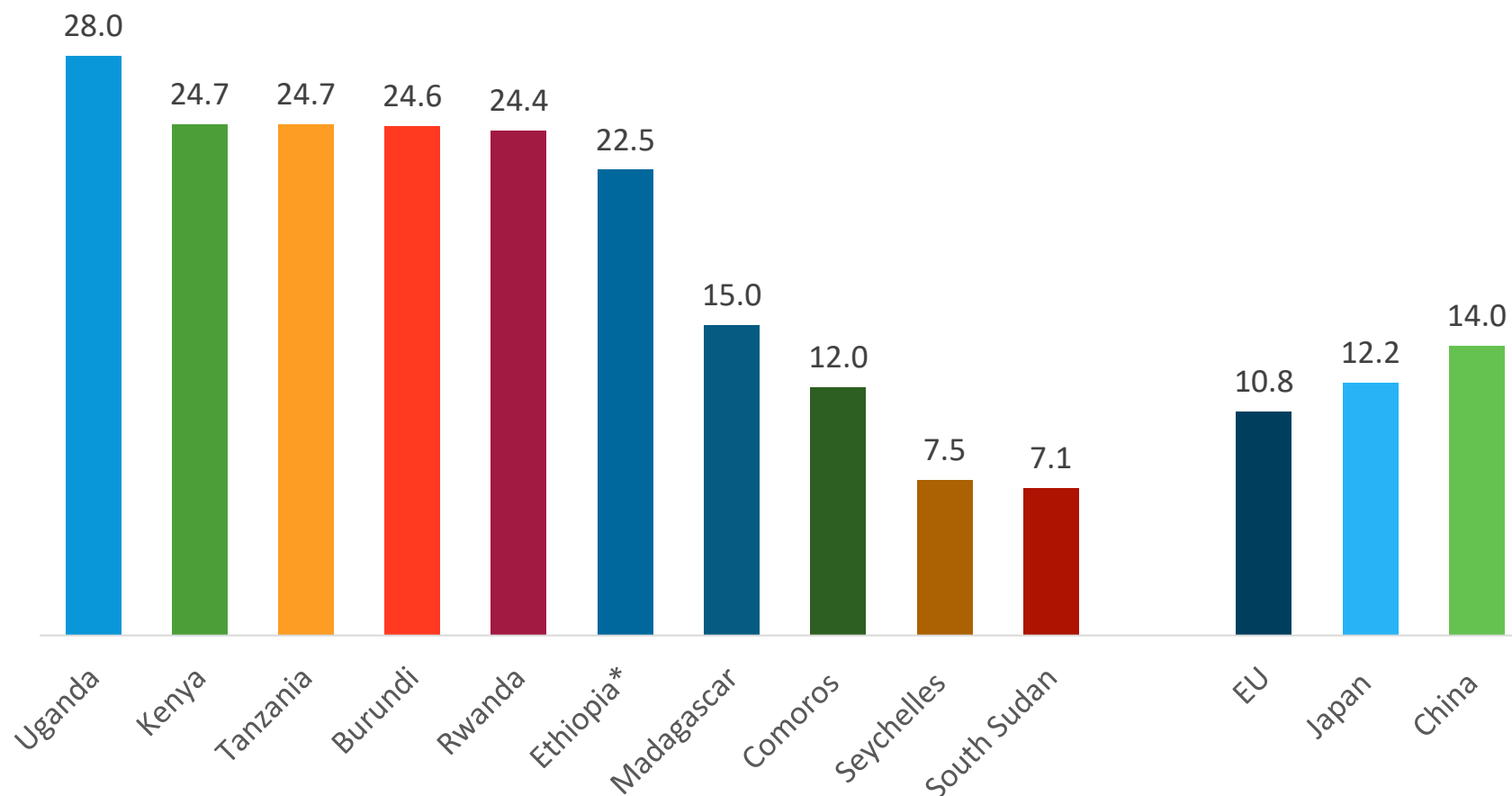
Importer	Exporter										
	World	EU	Africa	AMU	CEN-SAD	COMESA	EAC	ECCAS	ECOWAS	IGAD	SADC
Africa	15.1	18.3	6.9	17.4	8.6	5.5	2.3	9.3	6.8	4.2	5.9
AMU	18.7	17.7	15.8	16.6	14.8	15.4	16.9	18.4	13.3	14.7	20.0
CEN-SAD	20.0	23.2	11.6	18.6	9.0	13.8	6.8	9.3	5.3	14.0	18.1
COMESA	14.7	20.8	5.0	7.9	3.5	2.6	0.7	6.8	14.8	1.6	5.8
EAC	18.3	23.3	6.9	41.9	2.3	2.1	0.1	6.7	20.9	0.5	11.8
ECCAS	21.2	23.5	14.5	22.1	10.4	5.7	0.4	12.5	22.8	0.8	22.0
ECOWAS	16.9	19.3	10.7	19.6	8.4	18.6	19.4	13.5	5.0	19.9	17.9
IGAD	19.0	22.6	10.2	44.3	1.3	0.9	0.4	3.1	19.4	1.3	16.3
SADC	10.2	11.5	3.9	13.2	9.5	4.5	4.2	9.4	11.5	6.4	2.7

Source: AATM 2020



# Eastern Africa is especially protectionist?

Eastern Africa, simple average MFN applied tariff rates on agricultural products, 2023\* (%)



MFN applied agricultural tariffs are high in Eastern Africa, but lower in island states...

Source: WTO World Tariff Profiles 2024 \*figure for Ethiopia for 2022

# Conclusions and Key Points for Discussion

- ▶ Eastern Africa is not far from **collective food security** – but needs to adopt a more coordinated approach to regional food security
- ▶ **AfCFTA** could greatly bolster intra-regional food trade, particularly in processed food products.
- ▶ **High tariffs & NTBs** continue to hinder intra-regional food trade
- ▶ Need to implement the **Comprehensive African Agricultural Development Programme (CAADP)**



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