Agricultural growth in Africa
Recent record ... & history

Jim Sumberg, Steve Wiggins & Sharada Keats
Background: story so far (v brief!)

130 years History
... optimism & pessimism

Performance since 1990: what do we know?
HISTORY

FLUCTUATING PERCEPTIONS OF AFRICAN AGRICULTURE
Optimism: Africa as opportunity
Africa’s dreadful 1970s

Gross Prod Food Per Cap Index 1964/63 = 100, 3 year moving av.

- **Africa**
- **South America**
- **Asia**
Sahel
1968-73

• Desertification???
Explaining failure of 70s & 80s

Exceptionalism
- Geography
- Institutions

External: debt and dependency

Poor policy
- Negative protection, urban bias
- Marketing boards, excessive state
'Only to feed her growing population at the present level of per capita food consumption, Africa would thus need to increase her food production at a rate of, say, 3.2 per cent per year for several decades in succession.

This is of course an impossible challenge for her to meet.'
BUT TIMES CHANGE ...

... OPTIMISM RETURNS
Commodity Food and Beverage Price Index, 2005 = 100, includes Food and Beverage Price Indices

Commodity Agricultural Raw Materials Index, 2005 = 100, includes Timber, Cotton, Wool, Rubber, and Hides Price Indices
Asia’s Imports

- Fixed Vegetable Oils
- Oilseeds

Imports, M tonnes

Year:
- 1990
- 1992
- 1994
- 1996
- 1998
- 2000
- 2002
- 2004
- 2006
- 2008
- 2010

Imports trend over time:
- The chart shows a general increase in imports with a significant rise from 2004 onwards.
- There are two distinct lines, one for Fixed Vegetable Oils and another for Oilseeds.
- The imports of Oilseeds have increased steadily, while those of Fixed Vegetable Oils have shown a more gradual rise.
Abundant land!
79 to 95: 0% per cap growth
96 to 08: 3.2% per cap.

Source: World Bank, World Development Indicators; data for South African Reserve Bank.
Average NRA for 1970/85 compared to 2000s

- Benin: 1970 to 85: -0.05, 200 to 2010: -0.05
- Burkina Faso: 1970 to 85: -0.03, 200 to 2010: -0.03
- Côte d'Ivoire: 1970 to 85: -0.02, 200 to 2010: -0.02
- Ethiopia: 1970 to 85: -0.04, 200 to 2010: -0.04
- Ghana: 1970 to 85: -0.03, 200 to 2010: -0.03
- Malawi: 1970 to 85: -0.02, 200 to 2010: -0.02
- Mozambique: 1970 to 85: -0.01, 200 to 2010: -0.01
- Nigeria: 1970 to 85: 0.00, 200 to 2010: 0.00
- Senegal: 1970 to 85: -0.03, 200 to 2010: -0.03
- Tanzania: 1970 to 85: -0.02, 200 to 2010: -0.02
Agriculture back on agenda

- Maputo Declaration 2003
- CAADP ex 2003
- AGRA
- Regional Economic Integration
RECENT PERFORMANCE
(A) REGIONAL & COUNTRY STATS
Av. Ann. Growth Rate 90/92 to 09/11

Benin
Burkina
Côte d’Ivoire
Ethiopia
Ghana
Malawi
Moz
Nigeria
Senegal
Tanz
AFRICA

Ag PIN
Ag PIN per cap

[Bar chart showing growth rates for various African countries]
Average Value Production Cultivated Land, US$ constant 04/06, per ha

- Benin
- Burkina Faso
- Côte d'Ivoire
- Ethiopia
- Ghana
- Malawi
- Mozambique
- Nigeria
- Senegal
- Tanzania

1990/92
2009/11
Increase, %
Growth of agricultural labour productivity, Africa, 1990/92 to 2009/11

Value per EAP Ag, Int$ cont 04/06

Increase seen 1990/92 to 2009/11, %

- Africa
- Eastern
- Middle
- Northern
- Southern
- Western

1990/92
2009/11
Change
Increase 90/92 to 09/11, %

Value, per EAP Ag, Int$ constant 04/06

- Increase, per cent
MICRO STUDIES: ANY LESSONS?
[FAC COMMERCIALISATION]
1. Production, Incomes can rise

Lume, Gross Margin, US$/ha

- Tef
- Wheat
- Chickpeas
- Lentils
- Onion
- Tomato
- Green pepper
2. No need for dramatic change

- Domestic markets
- Gradual change
  - Cautious commercialisation
- Surprisingly active labour & land markets
- Lack of credit hinders, does not stop
3. Not exceptional

Peri-urban now the norm
But where are the long studies?
Kagera, Tanzania: Consumption, Ann, Adult Equiv, Tshs

- Farm -> farm
- Farm -> middle
- Farm -> city
- Middle -> farm
- Middle -> ...
- Middle -> city
- Total

Millions

1991/94
2010
Concluding

Half empty: room for improvement

Half full: things are improving

Country variations: learn from Africa

[Learn right lessons from Asia]