1 Highlights of the food security situation in Africa

1.1 Overview

The food security situation on the continent in the first semester of 2012 was overshadowed by a looming food and humanitarian crisis in the Sahel due to drought. This came on the heels of the crisis in the Horn of Africa in the previous year, when 12 million people required humanitarian assistance and famine was declared in Somalia. Even though famine conditions no longer exist in Somalia, nearly one-third of the population was reported to be in crisis during the first quarter of 2012, unable to fully meet essential food and non-food needs.

It is currently reported that in East Africa, the main seasonal rains started late, shortening the crop-growing period. Furthermore, floods affected areas in Kenya, Somalia, the United Republic of Tanzania and Uganda, while severe dry conditions persist in parts of north-eastern and coastal districts of Kenya. In general, despite some improvement, the food situation of vulnerable groups remains a serious concern in the subregion, especially in pastoral areas affected by the earlier drought. A number of countries are facing severe localized food insecurity due to the influx of refugees, a concentration of internally displaced persons, or a combination of crop failure and deep poverty.

The banning of several international aid agencies from operating inside Somalia is likely to exacerbate the humanitarian crisis.

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1 Jointly prepared by ESTA, OSAN and the ONRI team comprising: Oliver J.M. Chinganya (ESTA.2), Vincent Ngendakumana (ESTA.2), Bouchaib Boulanouar (OSAN.2), Edson Rurangwa Mpyisi (OSAN.0), and Clotilde Bai (ONRI1) under the supervision of Charles Leyeka Lufumpa (Director, Statistics Department) and Abdirahman Beileh (Director, OSAN).
An emergency operation (EMOP) was recently initiated by the World Food Program (WFP) to deliver food distributions to 4.2 million people in the Sudan until the end of 2012. This will target the most vulnerable households in conflict-affected areas of Darfur and the Central, East and Three Areas (CETA) region. Food stocks are expected to run out earlier than normal in these areas, triggering an early start of the lean season and pushing food prices higher. This means that higher levels of food insecurity are expected in North and South Darfur and in parts of South Kordofan and the Blue Nile states.

The drought-induced influx of Somali refugees into neighboring countries has significantly declined since August 2011. However, according to the UNHCR, there are still about 920,000 refugees in camps in Kenya, Ethiopia, and Djibouti. Almost 80 percent of these refugees are from Somalia, where access to basic necessities such as food, shelter, water and sanitation is often precarious.

According to the Food and Agriculture Organization of the United Nations (FAO), a sharp drop in last year’s cereal and pasture production (due to irregular rains in 2011), combined with high food prices and civil strife, has led to increasing food insecurity and malnutrition in several countries of the Sahel region. In West and Central Africa, some 13 million people are reported to be at severe risk unless urgent action is taken. Across Chad, Burkina Faso, Mali, Mauritania, Niger, and northern Senegal, malnutrition rates hover around 10–15 percent, while in some areas, rates have risen beyond the emergency threshold level of 15 percent. Over 1 million children are estimated to be at risk of severe acute malnutrition (Oxfam, March 2012). The escalation of armed conflict in northern Mali in April 2012 has resulted in a large displacement of people and serious disruption in commodity movements, worsening food security there. Furthermore, desert locust outbreaks have been reported, posing a further threat to the 2012 agricultural production in the Sahel, particularly Niger, Mali, and Chad.

In Central Africa, mixed weather conditions in Cameroon and the Central African Republic in early 2012 may negatively impact early crop development. Persistent civil strife continues to heighten food insecurity in the subregion, particularly in the Central African Republic and Democratic Republic of Congo, causing a surge of internally displaced persons, including into neighboring countries.

In Southern Africa, the food security situation remained stable during the first three months of 2012, although punctuated by pockets of acute food insecurity. Damage caused to crops and homes as a result of the cyclones also weighed heavily on affected communities. A prolonged dry spell in the subregion reduced productivity levels, thereby aggravating food insecurity.

In North Africa, early forecasts anticipate a sharp decline in cereal production in Morocco as a result of erratic and insufficient rains during late 2011 and early 2012. In the other countries of the subregion (Algeria, Tunisia, and Egypt), above-average harvests are expected. However, major outbreaks of Foot and Mouth Disease (FMD) have been reported in Libya and Egypt, threatening livestock and milk production. An estimated 6.3 million buffalo and cattle and 7.5 million sheep and goats are at risk in Egypt. Although FMD has circulated in the country for some years, this is an entirely new strain known as SAT2, against which livestock have no immunity. Other countries in the subregion are also at risk from a spread of the disease.

To sum up, the FAO reports that 28 out of the 35 countries that require external assistance for food are in Africa. They include the following:

- Countries with an exceptional shortfall in aggregate food

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3 Crop Prospects and Food Situation, Food and Agriculture Organization, No. 2, June 2012.
6 Crop Prospects and Food Situation, FAO, June 2012.
production/supplies: Burkina Faso, Chad, Gambia, Mali, Mauritania, Niger, and Zimbabwe.
- Countries experiencing widespread lack of access: Djibouti, Eritrea, Liberia, and Sierra Leone.

The food security situation in some countries has been aggravated by increases in international cereal prices during the first five months of 2012 (see section 1.2.1). A breakdown of the situation by subregion is provided in section 1.2.2 below, through an analysis of domestic prices.

1.2 Recent trends in food prices

1.2.1 International food prices

i) Global food price trends

The FAO’s global Food Price Index (FPI) measures the monthly change in international prices of a basket of food commodities, comprising meat, dairy, cereals, oils, fats, and sugar. Chart 1 presents the FPI for the period January 2007 to end June 2012.

The year 2011 saw a continuous decrease in the global food prices. Considered all together, they recorded a decrease of 11 percent in December 2011, down from their overall peak of February 2011. They continued to be fairly flat during the first five months of 2012, but with a slight increase during the first three months of this year, rising at an average of about 2.5 percent in March 2012 over the revised December 2011 price levels. The greatest price decreases have been for dairy, oils, and sugar during this period. By comparison, meat and cereal prices have remained fairly stable (see Chart 2).

It should be noted that at their current level, the international prices are 15.4 percent below their peak value (in nominal terms) of February 2011.

Chart 1: Global Food Price Index (FPI)
ii) International cereal prices

In June 2012, international cereal prices recorded a drop of 3 percent from the March level, due to favorable supply prospects. Chart 3 shows that the international price for Ukraine-maize remained fairly stable during the first few months of 2012, dipping to 236.0 USD/tonne in June 2012 from 263.0 USD/tonne in May (corresponding to a decrease of 2.5 percent). The decrease in international wheat prices is mainly explained by the arrival of rains in some major wheat-growing areas, as well as weaker maize prices.

However, the price of all other cereals rose during the same five-month period. In particular, both USA Gulf-sorghum and Pakistan-basmati rice have recorded major rises in recent weeks, reaching 282.4 USD/tonne in July for sorghum and 931.0 USD/tonne for basmati rice in June. This represents an increase of 29 and 6 percent respectively from their levels of May 2012.

These international price trends have impacted African countries, and will continue to do so, especially those that depend heavily on cereal imports.
To tackle the severe food deficit in some areas of the continent, the distribution pattern of food products between surplus and deficit areas needs to be improved. In this context, the development of coordinated regional infrastructures, including food security corridors, can play a part in ensuring sustainable food security in Africa. This is discussed in Section 2.4 of this brief.

1.2.2 Food prices in African subregions

i) Central Africa

Reflecting the reduced production and tight supply in Cameroon and its neighboring countries (Chad, northern Nigeria), prices of the main staples (e.g. maize) have been registering an upward trend since early 2011. In December 2011, they were 42 and 10 percent higher in Bamenda and Yaoundé markets respectively than in December 2010. Although rice prices remained mostly stable in recent months, the average annual consumer price inflation jumped to 2.9 percent in 2011 compared to 1.3 percent in 2010. On the other hand in Gabon, which is highly dependent on cereal imports, prices of imported wheat and rice in the first semester of 2012 were slightly below the levels recorded for the same months of 2011. The average annual CPI (Consumer Price Index) was fairly low due to government interventions, which included subsidies and cuts in the value-added tax rate in 2011. These trends are illustrated in Chart 4.

ii) East Africa

Cereal prices decreased during the first semester of 2012 in several countries of the subregion, as newly harvested crops came to market (see Chart 5). In addition, food aid has been distributed in drought-affected areas. In Somalia, wholesale maize and sorghum prices in Mogadishu markets declined by about 45–60 percent.

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Charts 4 to 7 are based on FAO data (http://www.fao.org/gIEWS/pricetool/).
from June 2011 to January 2012. Sorghum prices declined further as the bulk of the 2011/12 deyr harvest was put on the market.

The January 2012 maize price in Ethiopia was 32 percent below the September 2011 record high level. Kenya recorded an increase in the price of maize in December 2011 due to heavy rainfall, which delayed harvesting operations. Although this eased off in February–March 2012, maize prices there started to rise again in April, as supplies from short rain harvests began to gradually run out.

By contrast, cereal prices recently increased in most markets in the Sudan and South Sudan, following low production levels and market disruptions. In the Sudan, sorghum prices increased by about 127 percent between June 2011 and June 2012 in the capital city Khartoum and in the main growing area of El Gadarif. This was due to the delayed start of the harvest and the reduction in the 2011 output. For the country as a whole, sorghum prices fell slightly from May to June 2012 (see Chart 5). In South Sudan, food prices increased significantly in main markets along the northern border. This was the result of trade restrictions imposed in May 2011, which drastically reduced imports from the Sudan, causing food shortages. In Northern and Western Bahr El Gazal, Jonglei, and Unity states, the wholesale prices of white maize in January were two to three times higher than one year earlier. Elevated fuel prices and transportation costs, as well as an increased food demand due to returnee populations and high numbers of internally displaced persons, largely accounted for the price hikes.
iii) Southern Africa

Throughout 2011, prices remained relatively stable across the subregion. Notable exceptions include the southern markets of Malawi, which experienced rapid rises in the last quarter of 2011 and the beginning of 2012. Maize reached a record high of USD 0.4 per kg in Lilongwe during January 2012. Despite the country retaining satisfactory stocks (backed by the government’s decision to suspend maize exports in December 2011), increased transportation costs drove prices higher until January 2012. However, prices registered a 50 percent decline from February to June 2012, to reach USD 0.15 per kg – its lowest level for 11 months. In Zambia (national average), Mozambique (Maputo), and Zimbabwe (Harare), maize prices have remained fairly stable, with a similar situation prevailing in Madagascar for rice.

In the continent’s major exporting country, South Africa, robust international demand and expectations of a significant reduction in closing stocks for the 2011/12 marketing year (May/April) fueled price increases in January/February 2012. South Africa has responded by importing small quantities of maize from Zambia, Romania, and Ukraine to help replenish stocks. However, an influx of supplies from the new 2012 harvest and an appreciation of the Rand against the US Dollar resulted in a drop in domestic market prices. The price of white maize in South Africa fell by 29 percent over the first half of the year, from USD 0.34 per kg in January 2012 to USD 0.24 per kg by June (see Chart 6).
iv) West Africa

The impact of falling cereal production in 2011 at the regional level has been exacerbated by civil strife and insecurity in several parts of the subregion. The worst affected areas in this respect are northern Mali and northern Nigeria, which have seen major population displacements and disrupted trade flows. Moreover, several countries have imposed trade restrictions in response to the lower harvests and limited supplies. As a result, prices of locally produced cereals (maize, millet, and sorghum) have escalated since the harvest in October/November 2011. Currently, these cereal prices are well above their levels of one year ago. For instance, sorghum prices in Mali (Bamako), Burkina Faso (Ouagadougou) and Chad (N’Djamena) in early May 2012 were, respectively, 65, 48, and 24 percent higher than in May 2011.

Similarly, prices of maize and sorghum in Nigeria increased over the same period by 24 and 51 percent respectively, while millet prices in Niger recorded an increase of 32 percent in the period May 2011 to May 2012. Prices of imported food commodities have also remained firm in the subregion’s domestic markets, particularly in countries with a high import dependency ratio (such as Mauritania and Liberia). In other countries like Guinea (Conakry) and Ghana (Accra), imported rice prices increased by 35 percent between May 2011 and May 2012, while in Chad, they recorded a slight drop in May 2012 over the previous month. This was mainly due to the depreciation of local currencies against the USD and rising transportation (fuel) costs. These trends are illustrated in Chart 7.
v) North Africa

North Africa relies heavily on wheat imports from the international market to meet its domestic consumption requirements, with Egypt as the biggest wheat importer in the world.

For Egypt, favorable prospects for local cereal production in 2012 signal a slight decline in import requirements this year. However, the Foot-and-Mouth disease that is currently afflicting the region (see section 1.1 above) is taking its toll, with livestock imports assuming a growing trend in both Libya and Egypt. The expectation is for cereal prices to decrease in the near future in those countries, but for the price of meat and dairy to escalate.

1.3 Forecast for international food prices

The US Department of Agriculture (USDA) is predicting substantial food price increases in 2013, if not sooner, due to the ongoing severe drought now affecting more than half of all US farmland. The severity of the situation is illustrated by the fact that 78 and 77 percent respectively of the corn and soyabean crops are growing in areas designated as drought-impacted. Overall, 62 percent of farms and about two-thirds of total land area in some regions of the US are affected.

The drought’s impact is not restricted to these two field crops, however, but extends to other commodities which will, in turn, increase retail food prices. Nevertheless, the transmission of commodity price changes into retail prices typically takes several months to occur, consequently the major impact on the consumer is only expected in 2013.

According to the World Bank, the impact of the US drought on global markets is exacerbated by other

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countries also suffering from weather-related production issues. Almost continuous rain is causing problems for the wheat crop in many European countries, whereas the wheat crops in Russia, Ukraine and Kazakhstan have been hit hard by a lack of rain. In India, monsoon rainfall is about 20 percent below the long-term annual average. July is the critical planting month and there may be major negative implications if rains do not pick up.

Although the full impact of the drought is not yet known, price increases in countries that are major producers of corn, soybeans and wheat will have significant repercussions worldwide. Rises are likely to occur not only for bread and processed foods, but also animal feed, which will translate into hikes in the price of meat. Poultry meat is forecast to be the first to reflect the impact of higher feed costs, but also dairy products, fats and oils, particularly soybean oil.
Impact of regional infrastructure development on food security in Africa

2.1 Overview: causes of Africa’s food insecurity

This section makes the case that regional infrastructure development can play a key role toward improving food security in Africa. To understand the linkages between them, we need first to examine the main causes of food insecurity and why Africa is especially vulnerable to this risk. Food insecurity arises primarily when (a) food production is constrained, for example by climatic conditions such as drought or floods; (b) when there is insufficient production in a particular area to feed the number of dependent population living there; and/or (c) when local food prices/imports are very high, which may be due to increases in fuel/transportation costs or to the vagaries of international commodity markets.

The food supply problems in Africa are exacerbated by the phenomenon of rapid urban expansion and the concentration of migration flows to regional capitals. Africa has the fastest growing population in the world – currently standing at about 6.8 billion, which is projected to double by 2050. Its urban population is also expanding more rapidly than any other region – at 3.3 percent a year. If current trends continue, by 2050 more than half the continent’s population will be living in cities. Agricultural productivity therefore needs to keep pace in order to feed the growing urban population.

However, rural productivity in Sub-Saharan Africa ranks among the lowest in the developing world. This is caused by a broad spectrum of factors, including: extreme climatic conditions; the persistence of traditional methods of subsistence farming rather than using high-tech inputs and modern methods; and low investment in rural infrastructure, inter alia. The extreme climatic conditions that frequently afflict the continent often result in the loss of harvests and livestock, and this can lead to large-scale famine and massive displacement of populations. Conflicts affecting various African countries have also led to massive migrations of population to neighboring countries and to internally displaced people, which also causes severe food shortages and increased vulnerability.

Alongside these risks, Africa has to overcome another disbenefit. Its pattern of trade is characterized by a large-scale export of cash crops, together with the import of manufactured food commodities, which are subject to high price volatilities, further increasing the risk of food shortages.

When looking for root causes of the parlous state of Africa’s food security situation, one major deficit comes into stark relief – the poor and disconnected state of much of its infrastructure network. Subsistence rainfed farming provides livelihoods for most of the rural population, but it is mostly undertaken in remote areas without access to urban markets or to agricultural inputs (e.g. fertilizers, drought-resistant seeds). This constrains agricultural productivity on a large scale and prevents smallholders (most of whom

are women) from transitioning from self-sufficiency to commercial farming, as a means of exiting poverty.

Although the continent may be characterized as being in a situation of chronic food deficit, more than 85 percent of the rural poor live on land that has a medium to high potential for increased productivity. If harnessed properly, this untapped potentiality could help to alleviate the chronic food security problem. The next section examines the deficits that typify Africa’s agricultural sector by comparison with developed countries. It seeks to draw out lessons to be learned from the structure of food supply chains in other countries.

### 2.2 Characteristics of Africa’s agricultural sector compared to developed countries

In other parts of the world, the food supply chain relies on multimodal and seamless transportation systems (namely, railroads, highways, ports and airports) that connect agricultural producers to major centers of consumption and export markets, via the commercial platforms of wholesale markets. In such countries, food crises are temporary and rare. Indeed, the agricultural structure in developed countries comprises a chain of activities endowed with mechanized and intensive farming techniques; crop irrigation; high-technology inputs for example in the form of fertilizers, disease- and drought-resistant seeds, etc.; efficient transportation systems adapted to standardized storage conditions; industrial processing suitable for mass consumption; specialized site networks geared to handle food products; and well-functioning marketing and distribution centers linking to major transportation corridors and export markets.

The situation in Africa is very different at all stages of agricultural production, storage, and distribution, with the supply chains being generally underdeveloped and underfunded. The table below presents an outline of Africa’s multisectoral and fundamental food insecurity problems, which have common origins in all countries.

<table>
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<th>Activities</th>
<th>Situation in Africa</th>
<th>Situation in Developed Countries</th>
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| Agricultural food production | • Overall low productivity due to traditional agricultural practices  
                                  • Non-mechanized, rainfed agriculture with little take-up of new technologies and innovations, such as drought-resistant crops  
                                  • Insufficient production of marketable subsistence food | • Highly mechanized, intensive farming practices with full use of new technologies  
                                                                                     • Plentiful production geared to market demands |
| Transportation/ distribution and communications | • Inadequate connectivity infrastructure between areas of high production and high consumption  
                                                     • Inaccessible production areas due to poor state of rural roads and incomplete regional roads | • Infrastructure and connectivity meet the demand for rapid availability/transportation of perishable and seasonal products |
| Marketing              | • Insufficient exchanges between subregions with different but complementary agricultural potential  
                                  • Excessive increases in the prices of imported commodities from the global market  
                                  • Poor economic, logistical and trade infrastructure | • Modern marketing techniques to maintain the balance between supply and demand  
                                                                     • Establishment of reasonable prices for products |
To address the food security situation in Africa, decision-makers have considered launching national and regional food self-sufficiency policies: in short, a program for a “Green Revolution for Africa.” However, given Africa’s present deficits in terms of food storage capacities and large-scale and rapid transportation systems, any increases in marketable produce could lead to excessive stockpiling and gradual deterioration of foodstuffs at their site of production. Elsewhere in the developed world, logistical transportation solutions, including refrigerated lorries and warehouses, have proved to be effective solutions. In Africa, such solutions have yet to be fully developed.

As the table above demonstrates, food security hinges on well-functioning regional transportation networks; efficient pricing mechanisms; regional marketing and distribution networks, and sound logistics. Not least, it demands strong political will at the governmental level to construct a robust and coherent agenda for regional infrastructure development.

### 2.3 Role of regional infrastructure in the food supply chain

Infrastructure in terms of adequate energy and water/irrigation supplies, high-speed communications, and seamless transportation systems connecting areas of high production with centers of high consumption, all play a crucial role in safeguarding food security.

Because of the differing locations of activities along the food supply chain, their economic relationship is based on efficient transportation and long distance communication services. These are essential to ensure sustainable access to basic food products. Moreover, the development of regional infrastructure that can contribute to food supply and price stability will have a decisive impact on the overall level of consumption and on food security.

In Africa, agricultural resources are unequally distributed across national and subregional territories because of the disparate endowments and potentialities of different countries. The lack of connective infrastructure between deficit and surplus areas for the production, collection, and distribution of food...
products heightens food insecurity in all subregions. This vulnerability is accentuated by a lack of high-tech infrastructure (including refrigerated storage) for national and regional trade of food products – which are, by definition, seasonal and perishable.

Transportation infrastructures are used, in one direction, to distribute agricultural inputs to farmers to improve productivity and, in the other direction, to transport large volumes of produce from areas of production to those of processing, storage, marketing, distribution, and consumption. For transportation to be cost-effective, it needs to be reliable and delivered at low-cost, which is problematic for a continent with challenging economic geography. Furthermore, as outlined previously, increasing urbanization and migration to cities means that more and more people are relying on rural manpower and increased agricultural productivity to meet their nutritional needs.

Throughout the food supply chain, the regional economic role of the modern infrastructures of transportation, telecommunications, and energy facilitate cheaper long-distance product flows as well as enhanced commercialization and trade between complementary regions. The aim of regional trade infrastructure should be to promote cross-country synergies and exploit economies of scale by opening up larger markets, thereby lowering transaction costs.

2.4 Establishing regional food security corridors

The question then arises: Which infrastructure framework can best address the food security crisis in Africa? The establishment of food security corridors, as sketched out in Chart 8 below, would offer significant benefits to participating countries. This framework would comprise connected networks of roads, railroads, electricity, ICT (Information, Communication, Technologies), water and logistics that would serve all the locations of food supply chain activities, from agricultural producers, to factories (agro-industries), processing plants, distribution centers, through to consumers in urban centers. This would entail a sustainable process of regional integration of countries that possess comparable levels of food security and infrastructure support for their food economies.

The impact of regional infrastructure on food security depends on its nature and quality. Thus, the construction of food security corridors that accelerate and multiply communication between the poles of high consumption and production areas is one approach to promote food security. The impacts of the individual sectors of regional infrastructure development are summarized below:

1. **Transportation**: The modern infrastructure that supports regional transportation by road, rail, air, and sea can reduce transit times for products and lower procurement costs (inputs, transport and production). By opening up new markets, transportation facilitates diversification of products and expansion, thereby boosting trade and economic growth. The impact on marketable volumes, producers’ incomes, and consumers’ purchasing power is reflected in economies of scale and mass consumption.

2. **ICT**: The infrastructure that supports information, communication and technology allows the establishment of freight, transit, and cross-border trade platforms and facilitates the dissemination of regional market data on perishable products for a fair comparison of supply and demand. The impact on the security of formal business operations as well as on the reliability of transactions is reflected in the setting of reasonable prices, thanks to direct competition between regional markets.

3. **Electricity**: The electrification infrastructure (e.g. refrigerated containers) can transform or preserve large volumes of perishable products in a form that is appropriate to population consumption. The impact on the agro-industry as well as on the improvement of health conditions is translated into a better adaptation of processed products for urban and mass consumption.

4. **Water supply and sanitation infrastructure**: This helps to
build networks of drinking water supply, irrigation and health environment conducive to food consumption in urban and rural areas. The impact on agricultural intensification is reflected in the diversification of seasonal food crops or consumption of seasonal products and in the strengthening of regional water and food stockpiles.

5 Logistics: Other logistical infrastructures support the concentration of marketing areas across national and regional wholesale markets, as well as the connection of these networks to regional highways to establish food security corridors along with corridors of development.

When all these spheres are linked into a complementary intersectoral framework of food security corridors, their synergistic benefits are far greater than the sum of the individual sectors. The influence zones of such corridors cover economic areas that promote a balanced distribution of food security support areas. For countries with a network of modern and appropriate infrastructures, the impact of regional infrastructure can be crucial at all stages of activities along the food supply chain.

Secondary connective infrastructures guarantee cross-border linkages between local economies, their branching to isolated villages, thereby promoting access between economic concentration centers (consumption, processing, import and export) and production, extraction and exploitation areas.

Studies undertaken on the spatial distribution of economic infrastructures point to the need for development corridors and connective networks to be constructed, in order to meet food security requirements on the continent. The origin of food insecurity lies partly in a failure to instigate robust and coherent policies and strategies at a regional level. Therefore the solution must also lie at the regional level, as elaborated in the final section that follows.

**Chart 8 Influence zones of food security corridors**
Conclusions

Food insecurity remains a major development issue for Africa, with many countries facing periodic food and humanitarian crises caused, inter alia, by droughts and other natural calamities, wars and displacement of populations, lack of inputs, poor agricultural practices, high international prices and an overdependence on imported food stuffs, etc. It is important, therefore, that food security remains high on the continent’s development agenda.

Because food is the basis of human development, the regional integration policy for development should prioritize sustainable food security as a survival imperative. Consequently, attention should be focused by policymakers on:

(i) financing infrastructure networks that aim at developing regional and international trade and (ii) establishing food security corridors along regional corridors (as shown schematically in Chart 8).

An African infrastructure development program such as PIDA (Program for Infrastructure Development in Africa), for which the AfDB acts as Executing Agency, seeks to develop a strategic framework for the development of regional and continental infrastructure. In this respect, its agenda could include the development of food security corridors, as elaborated in section 2.4.

In addition, the development of “soft” regional infrastructure – including one-stop border posts (OSBPs) and other means to streamline administrative procedures and customs regulations – needs to be scaled up with the assistance of national governments working collaboratively. This will help to reduce bottlenecks at frontiers and speed up delivery times, which is crucial for the distribution of perishable foodstuffs. Further development of “soft” infrastructure should also help to reduce trade costs, making foodstuffs less expensive for the end consumer.