

An exploratory analysis of measures to make trade facilitation work for inclusive regional agro-food value chains in West Africa

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Key message

In West Africa, better performing regional agro-food value chains are seen as crucial for meeting growing demand for food and for contributing to inclusive economic growth, employment creation, poverty reduction and enhanced food and nutrition security.

Promoting regional agro-food value chains, however, requires coordination between different policy areas, not least between agriculture, trade, private sector development and infrastructure development.

Corridor initiatives, which are crucial for connecting Sahelian countries to global markets, could be more 'transformative' and supportive of regional agro-food value chains if they combined trade facilitation and infrastructure development with 'accompanying measures'.

For example, West Africa's rice and livestock value chains would benefit from measures to ensure: better road linkages to production areas; a strategic knowledge and communication agenda; effective public-private cooperation; and a more conducive trade policy environment.

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Acronyms

AGIR	Global Alliance for Resilience Initiative
AM	Accompanying Measure
BRACED	Building resilience and adaptation to climate extremes and disasters
CET	Common External Tariff
CILSS	<i>Comité Permanent Inter-Etats de Lutte contre la Sécheresse dans le Sahel</i> Permanent Interstate Committee for Drought Control in the Sahel
CRA	AGRHYMET Regional Centre
ECDPM	European Centre for Development Policy Management
ECOAGRIS	ECOWAS Regional Agricultural Information System
ECOWAP	ECOWAS Common Agricultural Policy
ECOWAS	Economic Community Of West African States
ETLS	ECOWAS Trade Liberalisation Scheme
FAO	Food and Agriculture Organization of the United Nations
GDP	Gross Domestic Product
IIED	International Institute for Environment and Development
IFPRI	International Food Policy Research Institute
JICA	Japanese International Cooperation Agency
MIS	Market Information System
NEPAD	New Partnership for Africa's Development
NRDS	National Rice Development Strategy
OECD	Organisation for Economic Co-operation and Development
ON	Office du Niger
PAU	<i>Politique Agricole de l'Union</i> UEMOA Agricultural Policy
PPP	Public Private Partnership
PRIASAN	Regional Program of Agricultural Investment and Food and Nutrition Security
PRAPS	<i>Programme Régional d'Appui au Pastoralisme au Sahel</i> Regional Sahel Pastoralism Support Project

PRIDEC	<i>Programme Régional d'Investissements De l'Elevage dans les pays Côtiers</i> Regional investment program on livestock in the coastal countries
PROFAB	Programme Food Across Borders
RCT	Randomized Control Trials
SIPSA	Information System on Pastoralism in the Sahel
SME	Small and Medium Enterprises
SSA	Sub-Saharan Africa
SWAC-OECD	Sahel and West Africa Club
UEMOA	West African Economic and Monetary Union
UNCTAD	United Nations Conference on Trade and Development
USAID	United States Agency for International Development
US	United States
WACIP	West African Common Industrial Policy

Executive Summary

Spurred by growing populations, increasing purchasing power and rapid urbanisation, demand for food in West Africa is growing rapidly, and the composition of this demand is changing. West Africa is increasingly importing food from outside the region, as the region faces a huge challenge in attempting to meet food demand through regional production and trade. Intra-regional food trade is mainly informal and generally considered to be well below its potential. In this context, the region and its member states seek to support the development of regional agro-food value chains and to improve the functioning of the regional market. This transpires from policy frameworks such as the ECOWAS Agricultural Policy (ECOWAP), the UEMOA Agricultural Policy (PAU) and the West African Common Industrial Policy (WACIP).

Promoting regional agro-food value chains requires coordination and synergy between different policy areas, not in the least between agriculture, trade, private sector development and infrastructure development. Cases in point are corridors that connect West African countries to each other and, in the case of landlocked Sahelian countries, to the rest of the world. Trade facilitation and infrastructure improvements along these corridors (e.g. building one-stop border posts, improving customs IT systems, port efficiency reforms etc.) can reduce high transaction costs, by reducing transport costs and addressing other non-tariff barriers to trade. This in turn can foster investment, productivity growth and market integration. However, other types of interventions are required to ensure that such trade facilitation benefits regional value chain development and intra-regional trade, rather than primarily facilitating extra-regional imports.

This study seeks to contribute to reflections and actions in this area, by looking at how corridor initiatives focused on trade facilitation could be made more ‘transformative’ by combining them with other developmental measures, in this paper referred to as “accompanying measures”. It focuses on the examples of the rice and livestock (cattle and small ruminants) value chains and takes political economy dimensions into account. Geographically, the study focuses on a particular subregion within West Africa, comprising the “Central Basin” and Senegal and Nigeria.

The different nature of the two value chains suggests that challenges affecting corridor performance and transport markets in West Africa could have significant but differing impacts depending on the value chain considered. For the case of rice, while improved trade facilitation along transport corridors could facilitate the movement of rice within the region, these corridors currently facilitate rice imports from outside the region, while in the case of livestock, a significant percentage of intra-regional livestock trade makes use of transit corridors.

Based on an analysis of key characteristics of the regional rice and livestock value chains and linkages with corridors (Section 2), as well as key bottlenecks for their development (Section 3), four key areas of accompanying measures are identified (Section 4), namely: (1) linking corridors to production/agro-processing areas and key markets; (2) a strategic knowledge and communication agenda; (3) supporting effective regional public-private cooperation platforms and value chain actors; and (4) contributing to a stable, conducive and transparent trade policy environment.

(1) Linking corridors to production/agro-processing areas and key markets

The West African region is characterized by insufficient road infrastructure linking production/processing areas to consumer markets across the rural-urban spectrum and across borders. Furthermore, producers and processors lack access to sufficient, adequate trucks at an accessible price. While inefficiencies in the transport sector affect both value chains, it is particularly true for livestock trade (and for other perishable

goods such as fruits and vegetables), which requires vehicles specifically fitted to convey live animals. Rail infrastructure is very limited. West African value chain development also faces issues related to processing, storage and market infrastructure, including along corridors.

As such, there is a need to go beyond roads and border-posts and better link corridors to production and agro-processing areas and markets, by building and improving feeder roads and secondary routes. For example, in the case of rice, it can involve better linking production basins in Mali and Côte d'Ivoire to Bamako-Ouagadougou, Bamako-Abidjan and Abidjan-Ouagadougou corridors. As regards market infrastructure to be improved, the examples of frontier livestock markets such as Bitou in Burkina Faso and Bakwu in Ghana, are mentioned.

(2) A strategic knowledge and communication agenda

While informal intra-regional trade is of great importance for sustainable development in West Africa, the current lack of knowledge on informal trade (e.g flows, actors, drivers etc.), makes it difficult for policymakers to address it adequately and effectively. Furthermore, value chain actors have limited access to market information - related to for example prices, demand, service providers, standards, etc. - to inform business decisions and inform policy discussions. For example, better access to information on the quantities and qualities of rice demand can contribute to matching rice supply with rice demand, and can help (weak) value chain actors receive a fair price for their product. Also, in the case of livestock, information on market prices, supply, demand and formal standards for selling and buying animals can be difficult to access, although mobile phones have gone a long way in remedying this issue.

A knowledge agenda therefore needs to accompany corridor initiatives both ex-ante and ex-post, to ensure better design and assessment of corridor-related interventions based on the reality on the ground, and later to help monitor their impacts. This would include strengthening the knowledge base on informal trade within West Africa. This could usefully include generating and comparing up-to-date regional value chain trade maps for key value chains with corridor routes. Market Information Systems (MIS) around corridors and priority regional value-chains could also be further supported, with a set of tools and processes designed to assist smallholder farmers and other value chain operators to better access information on regional input and output markets, prices, the most efficient available business services, etc. Such initiatives should build on and synergise with ongoing MIS efforts. Finally, strategic communication activities around the regional value chain agenda and the related coherence agenda between different policy/investment areas (agriculture and food security, infrastructure, trade and private sector development) can be enhanced. Awareness campaigns (including via newspapers, radios and social media), smart monitoring and evaluation, earmarked support to 'champions', as well as advocacy and peer-review mechanisms to create incentives for compliance with regional approaches, are all examples of strategic communication.

(3) Supporting effective regional public-private cooperation platforms & value chain actors

Political frameworks and regional rice and livestock initiatives recognize the importance of inclusive public-private dialogue and cooperation at different levels (local, national, regional). This requires systematic inclusive public-private fora for such dialogue and cooperation. Many public-private value chain platforms for structured and regular exchanges exist already at local and national level, although in some value chains and/or countries, these structures are weak. They are rare at regional level.

In this spirit, public-private value chains platforms can usefully be strengthened at (sub-)regional level, allowing private sector representatives/organizations and companies to inform the design and implementation of corridor initiatives.

Furthermore, and informed by such public-private dialogues, corridor initiatives can be accompanied by specific support for local actors, based on their needs and their likely impact on sustainable and inclusive development. This can be based partly on a comprehensive actor mapping. Depending on the mapping, this may for example include support for regional women and informal traders associations through resource centers at borders providing them with information tailored to their needs.

(4) Contributing to a stable, conducive and transparent trade policy environment

Regional agro-food value chain development is hampered by trade policies that are not conducive to the development of regional value chains and the weak implementation by member states of regional commitments. For example, implementation of the Common External Tariff (CET) differs between countries, which creates incentives for transshipment and smuggling (e.g. of imported rice) within the region. The ECOWAS Trade Liberalisation Scheme (ETLS) provides for free trade in goods between member states, but ECOWAS member states continue to use a variety of trade policy measures such as import and export bans, special taxes and other administrative measures, to prevent or impede imports from other ECOWAS member states.

The last suggested area of accompanying measures is therefore to support a conducive, stable and transparent trading environment for regional agro-food value chains, as in the absence of such an enabling environment, efforts to improve corridor performance could simply end up entrenching existing trade patterns, or even promoting increased consumption in West Africa of agro-food imports from outside the region, at the expense of regionally produced products.

1. Introduction

Spurred by growing populations, increasing purchasing power and rapid urbanisation in West Africa, demand for food in the region is growing rapidly, and the composition of this demand is changing. This provides an opportunity to boost regional agro-food production and trade in West Africa. This is crucial, as intra-regional food trade can facilitate the flow of food from food abundant to food deficit areas, thereby improving the region's food and nutrition security while promoting internal production. This is particularly relevant in West Africa, as the region is characterised by highly differentiated agro-ecological zones. Fostering intra-regional food trade at the same time provides opportunities for producers in the region by exploiting trade complementarities between agro-ecological zones, and/or benefiting from a larger regional market, thus allowing for economies of scale. Given that the agricultural sector employs 60 percent of the West African population, intra-regional food trade is crucial for addressing poverty in the region and for promoting economic growth and development.

However, the region faces a huge challenge in attempting to meet food demand through regional production and trade. Intra-regional food trade in West Africa is limited and mostly informal.¹ As a result, West Africa is increasingly importing food from outside the region (albeit imports of staple foods are stable on a per capita basis). To address this, **the region and its member states aim to design and implement policies and interventions that support the development of regional agro-food value chains and improve the functioning of the regional market.** Such emphasis can be found in the ECOWAS agricultural policy (ECOWAP) and in the UEMOA agricultural policy (PAU), as well as in the West African Common Industrial Policy (WACIP), and in the 2014 African Union Declaration on Accelerated Agricultural Growth and Transformation for Shared Prosperity (the so-called 'Malabo Declaration'), through which African Heads of State and Government committed to strengthening agricultural value chains and tripling intra-African agricultural trade by 2025.

Realising the goals of these policy frameworks requires coordination and synergy between different policy areas, in particular between agriculture, trade, private sector and infrastructure development. This is evident when it comes to corridors, which are crucial for connecting Sahelian countries to markets within and outside the ECOWAS region (see Figure 1 for the main corridors in West Africa). Trade facilitation² and infrastructure improvements along corridors can reduce high transaction costs, by reducing transport costs and overcoming other non-tariff barriers, thus fostering investment, productivity growth and market integration. This is important, but not enough.

Beyond lowering the costs of trade and transport, West Africa needs other types of interventions to move from transit to transformative corridors that contribute to inclusive economic growth, employment creation, poverty reduction and food and nutrition security, and that also benefit those value chain actors that are currently marginalised. To realise these plans will require a detailed understanding of the key interests and power relations across and between stakeholders, in order to improve the likelihood of implementation.

¹ According to official statistics, intra-regional trade in ECOWAS represents only 8 to 11% of total ECOWAS trade. Nevertheless, official trade statistics are considered to only capture a small proportion of intra-regional trade in West Africa. For agro-food products, it is estimated that up to 75% of intra-regional trade could be informal trade (World Bank, 2015).

² Trade facilitation has been defined by the WTO as 'the simplification and harmonisation of international trade procedures'. This includes for example measures to reduce transit time from port to destination and address efficiencies at the border crossings by strengthening transit and clearance systems and procedures.

Figure 1: Main West African transit corridors

Source: Saana (2015)

This study seeks to contribute to reflections and actions in this area, by looking at how corridor initiatives focused on trade facilitation could be made more ‘transformative’ by combining them with other development measures, here referred to as “accompanying measures”. It particularly looks at ways to enhance intra-regional trade and fosters inclusive regional value chain development.³

The study focusses on the examples of the rice and livestock (cattle and small ruminants)⁴ value chains. These value chains have been chosen not only for their political and economic prominence and their importance for addressing poverty and food and nutrition security, but also because both value-chains face a number of obstacles hampering their development. This value chain approach also allows for a greater understanding of how particular obstacles, interventions and reforms can/would impact on all the activities that go into bringing food to consumers (input procurement, production, processing, distribution, marketing, etc.), and for exploring the economic opportunities that exist along these value chains.⁵

³ The accompanying measures mainly relate to the areas of agriculture, private sector development, infrastructure, trade, food and nutrition security. We acknowledge that other areas are also important for regional value-chain development (e.g. peace and security, financing, environment) but are not covered by this study. On the other hand those are more national policies (and truly context-specific) whereas this study only addresses regional-level policies that cut across different national/context-specific features.

⁴ Poultry is not covered by this study.

⁵ SWAC-OECD 2016 study entitled “Emerging opportunities in the West African food economy” states that, driven by urbanisation and income growth, the West African food economy has radically changed over the past 60 years. The food economy, including all activities involved in producing food, from production to processing, transport and distribution totalled USD 178 billion in 2010, equal to 36% of the regional GDP. About 40% of the value added in the food economy is generated by non-agricultural activities. Post-harvest activities are rapidly developing and are expected to grow more quickly in coming decades than other segments of the food value chain. Policies and monitoring systems need to adjust to these changes to leverage the emerging opportunities in agricultural development, employment and value creation.

Geographically, the study focuses on a particular subregion within West Africa, comprising the “Central basin” and Senegal and Nigeria. This includes the following ECOWAS member states: Senegal, Benin, Burkina Faso, Côte d’Ivoire, Mali, Niger, Ghana and Nigeria. In this region, the main routes for formal international trade are:

- for **North-South trade**: the corridors emanating from the six major port cities: Lagos, Nigeria (with two ports, Apapa and Tin Can Island); Cotonou, Benin; Lomé, Togo; Tema, Ghana; Abidjan, Côte d’Ivoire; and Dakar, Senegal
- for **West-East trade**: the Trans-Sahelian Highway between Dakar, Senegal, and N’Djamena, Chad, and the Trans-Coastal highway between Dakar and Lagos.

These corridors connect the three landlocked Sahelian ECOWAS member states in the sub-region of focus (Burkina Faso, Mali and Niger) to the major ports of the coastal ECOWAS member states in this sub-region and thereby also to markets outside the region. The smooth functioning of these corridors is therefore of great importance for effective regional integration, and is particularly crucial for the landlocked Sahelian countries.

In this study, policy economy dynamics are taken into account. Going from policy to practice raises a multitude of challenges in terms of establishing desirable and feasible ambitions, identifying and brokering potential coalitions for reform based on power and interests, and supporting champions - all of which benefit from a more detailed political economy understanding of key actors and factors.

The study has involved a review of the literature on these two value-chains, as well as missions to the region⁶ to conduct interviews with relevant stakeholders in these value-chains, including representatives of national governments, regional organisations, farmers organisations, private sector organisations, civil society, technical and financial partners and development partners.

The paper is structured as follows: after giving an overview of intra-regional trade dynamics for the two value-chains (Section 2), it highlights the key infrastructure and trade related constraints they face (Section 3). It then suggests how a programme on infrastructure development and trade facilitation along the region’s main corridors could address these bottlenecks, so as to promote strengthened regional value chains and inclusive development (Section 4).

⁶ The missions covered Senegal, Côte d’Ivoire, Burkina Faso, Mali, Benin, Ghana, Niger and Nigeria.

2. Intra-regional trade in ECOWAS: the case of rice and livestock

2.1. Intra-regional trade in rice

Over the period 2000–2012, rice consumption grew at an annual rate of 4.3 percent in Africa, 5 percent in Sub-Saharan Africa (SSA), and 5.4 percent in West Africa, as Table 1 shows. The West African region has experienced consumption growth rates amongst the highest in recent years, with 4.2 percent before the rice crisis of 2007, 9.7 percent after the crisis and even 13.6 percent between 2010 and 2012 (Seck et al., 2013, cited by USAID, UEMOA, ECOWAS and NEPAD). Per capita consumption of rice in ECOWAS is expected to increase from 44 to 53 kilograms on average between 2011 and 2025. Total rice consumption is projected to reach around 24 million metric tons by 2025, increasing by 74 percent over the period 2011–2025 (IFPRI, 2015). The rice market is highly segmented. In some countries, like Mali, local rice is more popular, while the Senegalese prefer imported broken rice, according to AfricaRice.

Table 1: Rice consumption growth rates (annual percent) in some African regions over the period 2000–2012

Region	2000–2012	2000–2007	2007–2012	2010–2012
Central Africa	3.6	4.3	6.0	6.6
East Africa	4.6	4.1	5.7	3.0
North Africa	1.5	2.9	–2.5	2.5
Southern Africa	4.9	9.2	1.7	12.3
West Africa	5.4	4.2	9.7	13.6
Sub-Saharan Africa	5.0	4.4	7.9	10.3
Africa	4.3	4.0	5.9	8.7

**No data for Rwanda and Uganda, for 2000; however, periods start from 2001 (2001–2012 and 2001–2007).*

Source: Seck et al. 2013, cited by USAID, UEMOA, ECOWAS and NEPAD.

USDA data, 2013.

West Africa has been making remarkable improvements in terms of rice productivity and land under cultivation, hence significantly increasing regional rice production output, with an annual growth rate of 5.76 percent for the period 2000–2010, according to USAID, UEMOA, ECOWAS and NEPAD. However, the annual consumption of rice has been increasing faster than production, which has led to an increase in the gap between regional production and consumption. As a consequence, imports of rice from outside the region have been growing, with **almost 40 percent of the rice consumed in West Africa being imported from outside the region**, mainly from Asia. **Locally produced rice remains mostly within the country of production** (Campbell et al., 2009, cited by World Bank, 2015), although some unrecorded cross-border trade takes places, especially when production basins are located close to the borders (for instance, parboiled rice produced in western production basins in Côte d'Ivoire, destined for Guinean markets across the border). According to Haggblade et al. (2012), **most of the rice traded in West Africa comes from outside the region, with such imported rice accounting for nearly 90 percent of marketed volumes. This suggests that most of the rice moving along corridors and (eventually) crossing the borders between West African countries is rice imported from outside the region.** This imported rice arrives at the main ports in the region and flows through transport corridors to reach final markets.

According to UNCTAD data, formal intra-regional trade of rice in West Africa remains modest and doesn't show a significant increasing or decreasing trend in the last 10 years. Rice doesn't figure amongst the top 10 intra-regionally traded products. However, it is well known that official data not only give a distorted picture of the magnitude of intra-regional trade, but also of its composition. For agro-food products, it is estimated that up to 75 percent of intra-regional trade could be informal trade (World Bank, 2015). Surveys indicate that **a substantial share of informal cross-border trade in sub-Saharan Africa concerns local staple food commodities (e.g. cattle, maize and rice) (OECD, 2009).** Hence, **intra-regional local rice trade, while very modest, is likely to be more important than official figures suggest.**

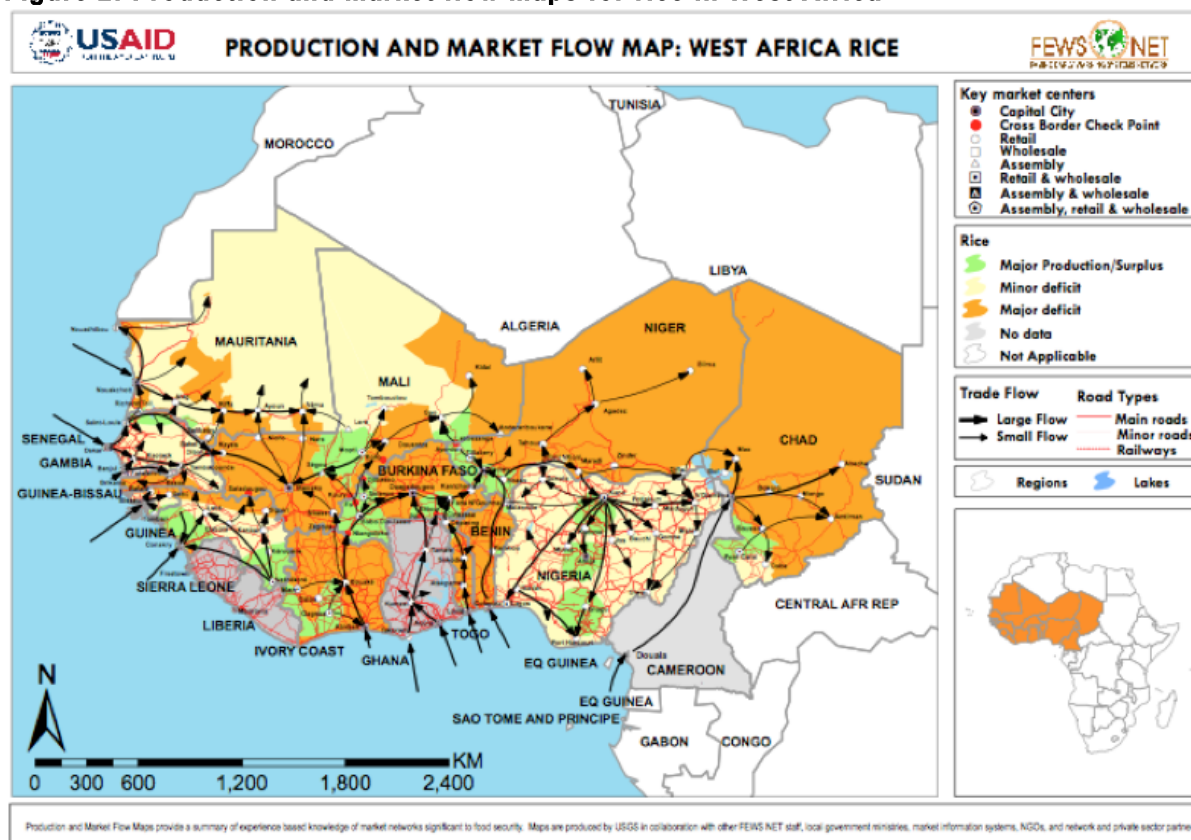
Different authors have attempted to map and quantify intra-regional trade flows of rice, but the information is far from being precise or complete. For example, according to Josserand (2013), some localized parboiled rice trade exists, and the most important trade flows are from Mali to Mauritania, Senegal, Niger, and others. USAID/CILSS note small quantities of parboiled rice being exported from Benin to Nigeria and from Burkina Faso to Mali. According to Campbell et al. (2009), cited by World Bank (2015), informal exports of rice are mostly from production locations close to borders. For example, informal trade has been observed from the Senegal River Valley to Mauritania, where rice prices were higher. Interviewees point out that Côte d'Ivoire also exports small amounts of rice, in particular parboiled rice to Guinea.

According to World Bank (2015), **three types of intra-regional rice trade** take place in ECOWAS: (a) **"arbitrage trade"**, as informal transit re-export and trade deflection of rice imported from outside the region. This is driven by variations in import and domestic policy regimes that result in price differences and thus incentives for traders to arbitrage at a profit between these markets; (b) **"border trade"** as local trade motivated by proximity, the porous nature of borders, and the local patterns of excess supply and demand; and (c) **"regional trade"** which occurs along corridors between some surplus production and demand areas. Clearly, these are not mutually exclusive categories. **Intra-regional informal trade** is mainly conducted by a large number of individual traders, a large proportion of whom are women, and **micro, small and medium-sized enterprises** in border areas and often consists of **small consignments (ICTSD, 2013), but this sizeable cross-border trade doesn't necessarily take transport corridors.**

The West African rice sector is still largely dominated by family farms of small size, both in terms of production and processing. They are the poorest and weakest actors in the value-chain, lacking financial and technical resources. Since the 2008 crisis, major international private groups have invested both in production and in processing, resulting in the **emergence of integrated rice centres**, characterized by (1) the cohabitation of small family farms, held by producers often involved in cooperatives or other economic interest groups, with big farms, often managed by large international groups⁷; and (2) the establishment of large modern processing units which help structuring new local agro-food systems⁸. This has led to the entry into the rice value chain of new actors, in particular more formalized companies and other economic operators, who have brought more overall entrepreneurial management to the value chain (ECOWAS, UEMOA and NEPAD, 2015).

⁷ Examples are OLAM, STALLION and VETEE in Nigeria, Dreyfus in Côte d'Ivoire and the Agricultural Company of Saint Louis in Senegal.

⁸ This involves the aggregation of the local production for formal marketing outside of that area, new working relationships between stakeholders, etc.

Figure 2: Production and market flow maps for rice in West Africa

Source: USAID, FEWSNET, 2009.

Information on informal rice trade and the location of rice production basins and urban markets imply that **some (potential) intra-regional rice trade may pass through transnational roads, especially in the Central Market basin (e.g. Bamako (Mali)-Abidjan (Côte d'Ivoire); Bamako (Mali)-Ouagadougou (Burkina Faso))**. Indeed, Mali is the only major rice-producing country in West Africa that approaches self-sufficiency⁹ (Haggblade et al., 2012), and according to its National Rice Development Strategy (NRDS), the country has the ambition to become a net rice exporter, implying a need to benefit from corridors linking Mali to its neighbors. The Office du Niger¹⁰ (ON) is the largest production area in this country, and its development is specifically envisaged in PAU activities¹¹. According to the ON website¹², production in the ON is expected to increase from 127,711 ha and 794,396 tons of paddy rice in 2015-2016 to 146,113 ha and 914,979 tons of paddy rice in 2016-2017, i.e. to experience more than 15 percent increase in production output.

The scarce available information also suggests that most of the existing intra-regional trade of local rice is **cross-border informal trade between production basins in the vicinity of borders and the markets they serve**. Therefore, for the time being, **corridors primarily serve the transport of rice imported from**

⁹ Mali, Guinea, and Côte d'Ivoire all produce roughly 600,000 tons of rice, while Nigeria produces four times that amount. Nigeria, the largest rice producer in West Africa, is also the region's largest importer (Haggblade et al. 2012). Côte d'Ivoire can be considered as an emerging rice producing centre, as it has made over the last ten years significant efforts to boost domestic production. Its contribution to regional production increased from 11,6% in 1961 to 13,3% in 2013.

¹⁰ The Office du Niger (ON) is a Malian parastatal company that manages one of the largest and oldest rice irrigated areas in West Africa. The intervention area is the western part of the central Niger Delta.

¹¹ "Increase the pace and volume of irrigation schemes in the Office du Niger area in order to increase food production, especially rice." (PAU)

¹² <http://www.on-mali.org/joomla/index.php/page-daccueil>

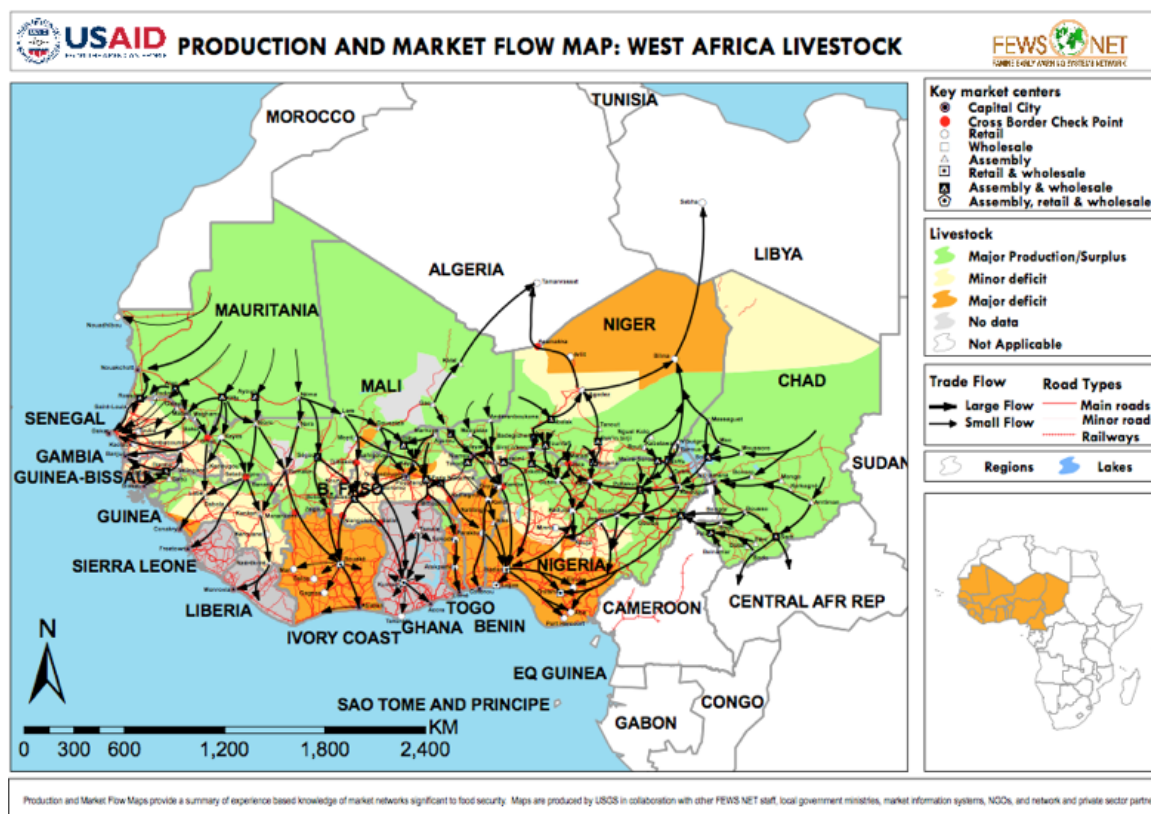
outside the region, benefiting regional consumers but potentially undermining regional producers, and broader value-chain and economic development in the longer term.

2.2. Intra-regional trade in livestock

Livestock rearing is one of the main economic activities of West African countries, and an activity on which the poorest populations depend for food and income. It provides, at times, for some countries, 44 percent of agricultural GDP (SWAC-OECD, ECOWAS, 2008). **Livestock, including both cattle and small ruminants (sheep and goats), is one of the major agro-food products traded intra-regionally** (Torres and van Seters, 2016). Data on West African livestock trade is variable, but the total value of annual intra-regional trade in livestock in West Africa is estimated to be in the hundreds of millions of US dollars.¹³

There is a particularly strong demand for livestock from coastal ECOWAS countries, where increased purchasing power and rapid urbanisation have led to changing dietary patterns and greater demand for meat. Most livestock exported to coastal markets in West Africa is sourced from the Sahelian ECOWAS countries, Burkina Faso, Mali and Niger, where agro-climatic conditions are favourable for livestock production. As a result, **West African trade in livestock has a distinctly North-South orientation, with livestock trade flowing southward from the Sahelian ECOWAS countries to the coastal ECOWAS countries along major corridors and other routes** (see Figure 3).

Figure 3: Production and market flow maps for livestock in West Africa



Source: USAID, FEWSNET, 2009.

¹³ The Comité Permanent Inter-Etats de Lutte contre la Sécheresse dans le Sahel (CILSS) estimates that trade in livestock along the Bamako–Abidjan, Bamako–Dakar, Ouagadougou–Accra, and Ouagadougou–Parakou corridors collectively was worth approximately US \$311 million between July 2013 and June 2014 (Cook, 2015).

However, while demand for meat in the urban centres of the coastal ECOWAS countries is growing, **the traditional systems of livestock production which predominate in Sahelian West Africa are not able to respond to growing demand, as sector-wide shortcomings limit the overall number of animals available for commercialization** (Cook, 2015). In addition, meat trade between West African countries is poorly developed due to a lack of adequate meat transport and processing infrastructure such as abattoirs, refrigerated transport, and cold storage facilities. Consequently, coastal West African countries tend to increasingly import meat **from outside the region to satisfy unmet local demand**.

While there is some commercial intensive livestock production in West Africa, **livestock production in the Sahel is dominated by smallholder production using traditional breeding systems, including pastoralist systems in the drier agro-ecological zones and mixed crop-livestock production in wetter zones** (Ly et al., 2010). Pastoralist systems include purely nomadic systems, semi-settled agropastoralism (involving seasonal transhumance in search of grazing) and sedentarised agropastoralism. These traditional systems are known to have low off-take (selling) rates that are not closely linked to market forces - in other words livestock production does not substantially increase in response to increasing prices/demand, while it generally reacts more strongly to other, non-market related factors, such as lack of grazing (Cook, 2015). Nevertheless, livestock export is a key element in the livelihood systems of pastoral and agro-pastoral populations.

There are three recognised livestock trading basins in the region. The countries of focus in this study belong to the second and third basin. The second basin is the central area, comprising Burkina Faso, Côte d'Ivoire, Ghana, Mali, and Togo. The basin acts as a pole of attraction for animal products consumed in Côte d'Ivoire and to a lesser degree Ghana. The third basin comprises Benin, Cameroon, Chad, Niger and Nigeria. Nigeria and to a lesser extent Cameroon are poles of attraction for animal products. Some trade flows may come from the second basin, in particular Burkina Faso and Mali, passing through Togo (SWAC-OECD, ECOWAS, 2008).

The marketing channels involved in intra-regional livestock trade in West Africa, which typically involve the export of Sahelian livestock to coastal markets, can be quite complex, involving numerous transactions and intermediaries (see Box 1). As many transactions are credit-based, livestock traders in the region tend to rely on familial and social networks, and on traditional practices developed to reduce the transactional risks in selling to foreign markets (Cook, 2015).

Box 1: Livestock marketing channels in West Africa

The export of livestock from Sahelian countries to coastal markets involves many domestic and foreign actors and several marketing channels in both exporting and importing countries. Most of the livestock is produced by smallholder pastoralists and farmers and marketed by private entrepreneurs or traders operating through a marketing chain involving collection, regrouping and terminal markets. The existence of many intermediary markets where cattle is regrouped and some trading takes place brings an additional level of complexity to the dynamics of livestock trade in the region.

The livestock marketing channels may involve up to six intermediary markets to move animals to the final consumer. These include collection or primary markets, regrouping markets, border markets, transit markets, distribution markets and terminal markets.

Livestock marketing is supported by a network of regional cross-border trade through a series of corridors ("couloirs"). The regional cross-border trade network supports million of people in West Africa, including livestock producers, traders, and other groups such as trekkers, fodder traders, brokers, and middlemen who directly or indirectly derive their livelihoods from livestock production and trade. According to Inter-réseaux, livestock marketing in West Africa involves, in average, ten different actors from production to consumption.

The complexity of relevant marketing channels varies according to the corridors and the number of actors and intermediary markets involved. Some channels (e.g. the Mali-Côte d'Ivoire corridor via Sikasso) are simple and less sophisticated, while others are very complex with high numbers of intermediaries (e.g. the Burkina Faso-Benin-Nigeria corridor via Parakou in Benin or the Burkina Faso-Côte d'Ivoire corridor via Niangoloko in Burkina).

A significant percentage of intra-regional livestock trade in the central basin in West Africa makes use of existing transit corridors in the region, such as the Bamako-Abidjan, Bamako-Dakar, Ouagadougou-Accra and Ouagadougou-Parakou corridors. While trekking (transportation 'on the hoof') of livestock from production areas to collection and frontier markets is common within Sahelian countries, cross-border trade in livestock from frontier markets in Sahelian countries to terminal markets in coastal ECOWAS countries is mostly conducted by truck, with transportation by railway only possible along the Ouagadougou-Abidjan corridor (ILRI, 2006). For this reason, **challenges affecting corridor performance and transport markets in West Africa have a significant impact on livestock trade in the region and inhibit the full development of the livestock value chain in West Africa.**

3. Key bottlenecks for regional value chain development: the cases of rice and livestock

An important limitation to developing the rice and livestock sectors in West Africa, and agricultural value chains more generally, is the **lack of sufficient long-term financing, regardless of political statements and policy frameworks** (e.g. national and regional rice strategies). The Maputo Declaration commitment of 10 percent national budget allocation to agriculture has not been put in practice in most West African countries. A considerable part of available financing for agriculture comes from international development partners, and is not always allocated to sectors prioritised in regional and national policies, such as rice and livestock. There's also very limited access to credit for the private sector (producers, traders, processors, etc.). It is crucial that each government interested in developing agricultural value chains provides adequate long-term resources and facilitates access to credit for private sector actors.

Beyond financing, the challenges to develop the rice and livestock value chains in West Africa are numerous. For example, in the case of rice, according to FAO and African Development Bank (2015), challenges relate to the need for: i) holding down per-unit costs throughout the value chain (including at the farm level); ii) financial incentives for farmers for careful drying and storage of paddy to ensure better processing outcomes; iii) improved systems for paddy aggregation and assured delivery to processors; and iv) improvements in wholesaling, packaging and marketing of milled rice. Increasing productivity in small farms through better input availability, more productive seeds, the development of irrigation schemes, and savings in post-harvest segments, are also crucial intervention areas in the value chain. Improving aggregation processes and upgrading marketing channels in these small-scale production systems and strengthening producers' capacities to help them produce rice of consistent quality (so that larger scale mills can function) is also crucial. Improvements in farm-level productivity in the low-yield upland and bas-fonds systems could help improve the food security of the farming families growing the rice and begin to respond to the growing demand for rice in rural areas. Capturing a larger share of the burgeoning urban markets for rice, however, will require improving productivity in these irrigated systems and linking that production with improvements in milling, marketing and distribution.

This section, in line with the focus on this paper, zooms in on a number of (rice and livestock) regional value chain development challenges that relate, directly or indirectly, to infrastructure and

trade facilitation constraints, which affect intra-regional trade flows and the competitiveness of West African compared to non-West African rice and livestock/meat. The following key issues are discussed: (i) inadequacy of road and transport infrastructure; (ii) lack of trade monitoring and market information; (ii) inadequate public-private dialogue and cooperation; and (iv) poorly implemented and uncondusive trade policies.

Inadequacy of road and transport infrastructure

As highlighted in the previous sections of this paper, West Africa's main corridors are not the only routes used for intra-regional trade in West Africa, especially when we look at trade in agro-food products, informal cross-border trade and arbitrage trade. **Numerous trails and roads connect countries and are used for cross-border trade, to use the most direct route from a production basin to the cross-border market or to circumvent official border points**¹⁴. For instance, in Benin alone, a survey by the National Institute of Statistics and Economic Analysis of informal trade found 171 crossing points (a sample of all crossing points in the country), compared to about 30 official border posts (World Bank, 2015).

However, **the West African region is characterised by a lack of road infrastructure linking production/processing areas to consumer markets across the rural-urban spectrum and across borders**. In the case of livestock for example, the lack of road and transport infrastructure and especially the lack of continuity in transhumance routes are obstacles to conveying animals from production areas to grouping, border and transit markets. Many rice production basins are also ill-served by all-weather roads.

Furthermore, **the transport sector in West Africa is inefficient**. Producers and processors lack access to sufficient, adequate trucks at an accessible price. While this affects both sectors, it is particularly true for livestock trade (and for other perishable goods such as fruits and vegetables), which require vehicles specifically fitted to convey live animals. However, such vehicles are currently not available and **livestock is mostly conveyed through** inadequate means of transport, which is the main cause of animals' deaths and animal weight loss. Often these are trucks that are sent to deliver imports from coastal to Sahelian countries, with the drivers seeking to fill their vehicles on the outward journey to offset transportation costs.

Railway infrastructure in the West African region is very limited. In the case of livestock, transportation by rail is possible only along the Ouagadougou-Abidjan corridor, starting at the Kaya train station, approximately 100 km north of Ouagadougou. Transport by train has advantages over transport by road, as it takes less time and the animals suffer less along the route. However, the **number of train-wagons suitable for livestock is very limited**. These are highly priced and often not available. The relevance of this is well illustrated by Keturakis (2012, cited by World Bank, 2015), who indicates that Côte d'Ivoire has shifted cattle imports from Burkina Faso and Niger to Mali, from where it now sources 90 percent of its cattle imports. Keturakis claims this is partly due to reduced train services from Burkina Faso. Furthermore, **accessibility of the Kaya train station** is an issue, due to a lack of road infrastructure. As a result, the animals are generally trekked or trucked to Ouagadougou before being loaded into trains to Côte d'Ivoire. Hence, efforts to increase the availability of wagons and to improve road infrastructure linked to Kaya railway station could facilitate increased transportation of cattle between Burkina Faso and Côte d'Ivoire, and reduce the transport costs involved.

¹⁴ According to several interviewees in West Africa and some published literature (ODI, 2015, for instance) bribery of border officials is a significant problem at official border posts. Informal traders, in particular, are routinely forced to pay petty bribes to customs officials, decreasing their already low incomes and making the conduct of their businesses more difficult. The findings of the ODI study in Eastern Africa indicate that the establishment of a OSBP has not affected levels of corruption at the border and that it continues at a high level.

Furthermore, West African value chain development faces issues related to **processing, storage and market infrastructure**, including along corridors. For example, the export of meat is poorly developed, due to the lack of adequate meat processing infrastructure such as slaughterhouses and cold chains. Sahelian cattle is generally slaughtered in slaughterhouses in coastal countries, close to consumer markets. In theory, Sahelian countries would benefit more by exporting red meat instead of live animals. Many benefits would result from moving the slaughter process from coastal countries to inland livestock producing countries, and exporting refrigerated/frozen meat to coastal countries instead of live animals. This would be more effective for a variety of reasons; for instance, animal transport losses could be avoided, conflicts due to the movement of animals could be reduced, and it could increase domestic value addition in Sahelian countries for this value-chain. Cattle exporters would also avoid certain difficulties they face on livestock markets in importing countries. Nevertheless, most attempts to develop slaughterhouses in livestock producing countries and cold chains in the region have failed. This is partly due to the fact that costs related to the required capital infrastructure investment are high (refrigerated transport, maintenance costs, payment of illegal road taxes, among other costs). For instance, refrigerated trucks are expensive, and they should be large and find enough products requiring refrigeration to transport in order to operate profitably.

Lack of trade monitoring and market information

As indicated earlier, informal, unregistered trade is extremely important for the region's development and food security, as it mainly concerns food staples crucial for food and nutrition security; it is a key source of income to the most vulnerable populations (poor, women, youth); and it concerns the majority of West African traders. While informal intra-regional trade is of great importance for sustainable development in West Africa, **the current lack of knowledge on informal trade (e.g flows, actors, drivers etc.), however, makes it difficult for policymakers to address it adequately and effectively.** As a result, regional and national policies that take into account and deal with the informal private sector are rare.

Furthermore, **value chain actors have limited access to market information** - related to for example prices, demand, service providers, standards, etc. - to inform business decisions and inform policy discussions. The relevance of market information can be well illustrated by the mismatch between local production and the strongly segmented consumer demand for rice. Access to information on the quantities and qualities of rice demand can contribute to matching rice supply with rice demand, and can help (weak) value chain actors receiving a fair price for their product. Also, in the case of livestock, information on market prices, supply, demand and formal standards for selling and buying animals can be difficult to access, although mobile phones have gone a long way in remedying this issue. This means that the search for animals with qualities that appeal to the buyer, the negotiation process, payment and transfer mechanisms of ownership are highly informal, costly (time consuming), involve many intermediaries (each one of them using the limited information they have to their benefit) and there are many cases of failed transactions because of high transactions costs - i.e. exceeding the expected benefit (Williams T.O. et al., 2006).¹⁵ According to Mertz et al. (2016), new technologies are slowly improving pastoralist access to and use of information. Indeed, the basis upon which decisions are now taken by pastoralists includes experience from the past, own observations, information from family members, friends or hired scouts on vegetation and water resources, as well as prices, often conveyed by mobile phone (Rasmussen et al., 2015; Kitchell, 2016, cited by Mertz et al., 2016). Traditional information systems are now being

¹⁵ In the case of livestock, the fact that Sahelian traders need to move the animals up to coastal markets without prior knowledge on the market status (demand and prices) significantly reduces their bargaining power on the market terms. This issue is raised by many actors in interviews, some of whom gave the example of Nigeria, where local livestock resellers let Sahelian exporters wait for some days on their decision to buy or not the animals. As it is difficult for Sahelian traders to return back with the animals, the resellers propose low prices or ask the Sahelian traders to sell the animals on credit basis. As a result, reportedly, many Sahelian producers and traders do not frequent Nigeria's markets any more.

complemented by new technologies, but the full potential of mobile phone technologies in the decision making process (and for preventing or resolving conflicts) has yet to be fully explored.

Inadequate public-private dialogue and cooperation

Political frameworks and regional rice and livestock initiatives recognize the importance of inclusive public-private dialogue and cooperation at different levels (local, national, regional). This requires systematic inclusive public-private fora for such dialogue and cooperation. Many public-private value chain platforms for structured and regular exchanges exist already at local and national level, although in some value chains and/or countries, these structures are weak. They are rare at regional level. **Enhancing such regional public-private dialogue could help ensure that the interests, experiences and needs of a broad range of private sector actors inform corridor initiatives, to better support sustainable regional value chain development.**

In the case of livestock, it would be particularly useful for regional dialogues to help address issues related to transhumance (such as conflict and security, see Box 2), currently not well covered in national and regional policy-making. In doing so, particular attention should be paid to the coherence of regional and national policies affecting transhumance. Some of the ongoing regional programmes on livestock in West Africa aim to address this issue. For instance, the PRAPS (Regional Sahel Pastoralism Support Project¹⁶) is trying to revitalize the “cadres de concertation transfrontaliers” (multi-stakeholders consultation frameworks) on transhumance.

Box 2: Conflict and insecurity affecting the livestock value chain, a topic for public - private dialogue and cooperation

One of the key bottlenecks affecting the livestock value chain in the region is the issue of security for and treatment of pastoralists (including the conflicts between pastoralists and settled agricultural communities). Political instability and conflicts strongly harm intra-regional livestock trade. Conflicts and insecurity across the region have disrupted traditional livestock corridors and trade towards some great livestock importing countries such as Nigeria and Côte d'Ivoire. This is for instance the case of Gao-Dori-Ouaga-Abidjan corridor, which is no longer used because of insecurity in Northern Mali. Several corridors conveying to Nigeria markets have been disrupted or simply abandoned due to Boko Haram insurrection in Northeast Nigeria, Niger, Cameroon and Chad. Furthermore, increasing pressure on land use (i.e, grazing versus crop cultivation) and shifting transhumance routes (to adapt to changing environmental conditions, e.g. access to water) triggers conflicts between transhumants and settled farmers. Livestock raiding is a further source of tensions and violence between different herding communities (Inter-réseaux, 2015; Kimenyi et al, 2014, SWAC OECD 2013).

Poorly implemented and uncondusive trade policies

The **development of regional agro-food value chains in West Africa is hampered by regional trade policies¹⁷** that are either potentially inconsistent with efforts to promote such regional value chains; and/or are not implemented properly by national governments. Illegal practices at the level of border crossings

¹⁶ PRAPS, according to its French acronym.

¹⁷ These include the ECOWAS Trade Liberalisation Scheme (ETLS), the ECOWAS Common External Tariff (CET) and the ECOWAS-European Union Economic Partnership Agreement (EPA), which could also hamper efforts to develop regional value chains by, among other things, complicating ongoing regional integration efforts (if only some ECOWAS member states sign and implement the EPA, then this will have the effect of creating discrepancies in the tariffs applied by ECOWAS member states, effectively dismantling the CET and possibly necessitating otherwise unnecessary controls on the movement of goods within ECOWAS).

also create non-tariff trade barriers. For example, many stakeholders in the rice value chain in West Africa expected the ECOWAS Common External Tariff (CET) to provide greater protection for rice producers in the region (USAID, UEMOA, ECOWAS and NEPAD, 2015). Despite lobbying by farmer organisations for a high tariff on rice imports, which it was hoped would provide protection to producers and stimulate investment in local production, the CET for rice was set at 10 percent. This has left some stakeholders concerned that West African rice will be unable to compete with imports in the regional market. In addition, not all countries are applying the ECOWAS CET for rice yet,¹⁸ with the result that tariffs on rice imported from outside the region are not uniform across ECOWAS. This in turn creates opportunities for transshipment and smuggling within the region.

Similarly, while all ECOWAS member states participate in the ECOWAS Trade Liberalisation Scheme (ETLS), which provides for free trade in goods between member states and the simplification of import procedures for agricultural products traded within the region, many goods, including agricultural products, still do not benefit from free movement within ECOWAS. In the case of rice (and other agro-food products), ECOWAS member states continue to use a variety of trade policy measures such as import and export bans, special taxes and other administrative measures, to prevent or impede imports from other ECOWAS member states. Such a policy environment is not conducive to the development of regional value chains.

4. Suggested accompanying measures for corridors infrastructure and trade facilitation initiatives

Moving from transit corridors to corridors that stimulate economic transformation (particularly in agriculture) for sustainable and inclusive development requires going beyond pure transport-related infrastructure and trade facilitation measures, i.e. beyond building one-stop border posts, improving customs IT systems, port efficiency reforms etc.

The recommended accompanying measures (AMs) correspond to the regional value-chains bottlenecks presented above (drawing from the examples of rice and livestock), the existence of which suggest that **infrastructure and trade facilitation initiatives in West Africa would be more relevant when they tackle key identified bottlenecks in value-chains that are crucial for poverty alleviation and food security in the region, rather than simply promoting formal trade “acceleration”.**

These AMs illustrate the importance of: **(i) coherence among different ongoing initiatives across and within policy/investment areas, such as** agriculture and food security, infrastructure, trade and private sector development; **(ii) alignment** with regional policy frameworks (see Annex 1 for an overview of rice and livestock policy frameworks); and **(iii) donor coordination** (both vertical and horizontal coherence) given the mushrooming of development partners' initiatives in West Africa. For instance in the case of the livestock value-chain, infrastructure and trade initiative in the region should link-up with (i) regional and national livestock policy frameworks and initiatives, such as the West African action plan for livestock; (ii) existing key (donor-funded) initiatives concerning the livestock value chain such as 'Building resilience and adaptation to climate extremes and disasters' (BRACED), 'Regional Sahel Pastoralism Support Project' (PRAPS, according to its French acronym), 'Regional investment program on livestock in the coastal countries' (PRIDEC, according to its French acronym), etc.; and (iii) newly emerging initiatives such as the

¹⁸ ECOWAS member states have a five-year transitional period to implement the CET.

“Pastoralism and transhumance” component of the Regional Indicative Programme of the 11th European Development Fund.

Moreover, although these suggested accompanying measures aim to address regional bottlenecks through regional policies and investments, their impact will crucially depend on how they are implemented at national level and interact with national policies/investments. This is indeed the spirit of some of the AMs suggesting to support from the regional level the national/local institutions and farmers groups involved in implementing regional policies/investments. This is the case in particular for the AMs addressing market access constraints for smallholder farmers, local traders and processors.¹⁹

For a similar reason, another recommendation that cuts across all the suggested AMs is a **"differentiated gears" approach to this cooperation around the coherence agenda**. Subsets of ECOWAS members can go faster and deeper on (regulatory) collaborations that are of direct interest to them, for instance, addressing bottlenecks along a specific corridor that primarily concerns the corridor countries. The overall ECOWAS-level cooperation can be achieved through a gradual, targeted and strategic approach. For example, the issues around the Bamako-Abidjan corridor, which is strategic for rice and livestock regional value-chains development, may be better solved through a policy dialogue facilitation framework involving only Mali and Côte d'Ivoire, rather than through overall regional frameworks of UEMOA and/or ECOWAS, even though these existing regional instruments and regulation frameworks provide important background tools and rules to guide dialogues and cooperation between the countries.

4.1. Linking corridors to production/agro-processing areas and key markets

The first AM suggested is based on the identified **need to go beyond roads and border-posts and link corridors to production and agro-processing areas, markets and secondary routes**. Transformative corridors should not only link ports to large inland cities, but should also be connected to feeder roads in order to loop key regional food production areas to the booming West African markets. The literature is full of examples of risks of trade-reforms without such an AM. For instance, according to IIED (2016), “households in areas with good market infrastructure may be net winners from trade and infrastructure reforms, while those remote from trade links and without diversified income may be net losers”.

This paper has pointed out that intra-regional trade, especially intra-regional trade of food products, takes many different routes, before or after (eventually) taking a corridor. **By linking production basins/breeding areas and markets to main corridors, corridor initiatives can effectively contribute to regional value-chain development** as small and medium scale farmers/breeders, intermediaries and traders will have increased access to the main trade routes in the region, and will be better connected to markets. But this has to be done in the context of broader interventions addressing the many other persistent challenges that are present in these regional value-chains. Therefore, linking-up to broader ongoing value-chain initiatives and policy frameworks is crucial to achieve impact.

In the livestock **value-chain, for example, it would be important to not only improve official border posts, but also target frontier livestock markets**. For instance, depending on the final destination,

¹⁹ Rural roads are crucial linkages between agricultural production areas and domestic urban markets as well as transnational transport corridors (and hence the regional market). Electrification and physical agricultural markets are also crucial factors to ensure that raw farm commodities can be handled, stored and processed to become “tradable” products on domestic and regional markets. These rural infrastructure are usually planned under national policies and funded through national financial instruments, either from domestic sources or donors. Moreover, routine management and maintenance of these infrastructure are assured by national or even local authorities.

animals traded within the central livestock basin (linking production basins in Mali and Burkina Faso to consumption markets in Ghana, Côte d'Ivoire and Togo) can pass through the border markets of Bitou in Burkina Faso, and Bakwu in Ghana. Therefore, trade facilitation and corridor development initiatives should target not only the two sides of the official border (including improvements in hardware and clearance procedures at the Paga-Dakola border-post) but also the Bitou and Bakwu markets themselves.²⁰ Furthermore, **roads could be improved to better link production/agro-processing areas to grouping and frontier markets, to improve market access of producers/traders.** This can enhance trucking over trekking and reduce animal loss, if accompanied by a more performant transport sector, with good availability (in terms of numbers and price) of trucks suitable to transport live animals. Roads could also usefully be improved to make the Kaya railway station in Burkina Faso more accessible. This will contribute to exploiting the use of railway for livestock transportation from Burkina Faso to Côte d'Ivoire, which can also serve livestock originating from Mali and Niger. It will require enhanced availability of livestock train wagons, which is currently limited.

In the case of rice, this proposed AM on secondary routes could focus at an early stage on better linking production basins in Mali and Côte d'Ivoire to Bamako-Ouagadougou, Bamako-Abidjan and Abidjan-Ouagadougou corridors. This is based on the fact that Mali and Côte d'Ivoire have been identified as 'early mover' ECOWAS countries to step up local rice production, with good potential to significantly increase it further. Abidjan is a main rice-importing port in the region, serving Mali and Burkina Faso through the Abidjan-Bamako and Abidjan-Ouagadougou corridors respectively, but intra-regional trade in local rice, even if limited, also partly follows these routes. Therefore, this deserves **infrastructure improvements on secondary routes to better connect surplus production/processing areas and major markets in the three countries interconnected by these corridors.** Production basins in Mali and Côte d'Ivoire also merit to be better connected with secondary roads to corridors towards Nigeria, given that this country represents 50 percent of total rice consumption in ECOWAS.

4.2. A strategic knowledge and communication agenda

This paper and the existing literature on this subject point to the massive need for more information and evidence about trade-related dynamics, especially informal ones, to better inform business decisions and public policies.

Trade monitoring

First of all, **a knowledge agenda needs to accompany corridor initiatives both ex-ante and ex-post, to better design and assess corridor-related interventions based on reality on the ground, and later monitor their impacts.** This involves data generation and quantitative and qualitative analysis, taking into account political economy dynamics.

This would include strengthening the knowledge base on informal trade within West Africa. This could usefully include generating and comparing up-to-date regional value chain trade maps for key value chains with corridor routes. This would allow for better assessments of the potential of corridors to strengthen these value chains and inform policy interventions to exploit that potential. In addition, monitoring and evaluation frameworks require efforts to build a proper baseline to compare ex-ante and ex-post situations,

²⁰ Other frontier markets of this middle livestock couloir are Sikasso in Mali, Niangoloko in Burkina Faso and Cinkanse in Togo. The *couloir* is supplied by several production basins in Mali and Burkina Faso. This includes the basins of Kignan, Kieta, Finnkolo-Zonso and Lobougoula in Mali, and the basin of Tenkodogo, Bagre, Koupela, Pouytenga and Oumnogue, Danderesso, and others in Burkina Faso.

which could go as far as randomized control trials (RCT) - considered to be a robust and transparent way to evaluate a program.²¹

The Regional programme “Food Across Borders” (ProFAB) is relevant to take into consideration in this regard. Within this programme, launched in 2015 with financial support of USAID and the Canadian Cooperation, an extension of the CILSS intra-regional trade monitoring system on cross-border flows and road governance is planned.²² ProFAB envisages supporting the extension of the CILSS intra-regional trade monitoring system on cross-border flows and road governance, to better monitor flows of food, agro-pastoral, and fisheries products and barriers to regional trade (e.g. checkpoints, illegal taxes, red tape) along specific corridors. This will include some coverage of the Central Basin as it will start with a focus on: (i) Abidjan-Accra-Lome-Cotonou-Lagos; (ii) Abidjan-Yamoussoukro-Ferkessedougou-Zegoua-Sikasso-Bougouni-Bamako; and (iii) Dakar-Louga- Saint Louis-Rosso-Tiguent-Nouakchott.

Market Information

Secondly, systems need to be created and strengthened for stakeholders to be able to access information on trade opportunities, risks, procedures, and other relevant and necessary data to improve their ability to make business decisions and inform policy discussions. Lack of market information and transparency hinders efficient functioning of markets and effective policy-making. As AMs, **Market Information Systems (MIS)** around corridors and priority regional value-chains could be supported, with a set of tools and processes designed to assist smallholder farmers and other value chain operators to better access information on regional input and output markets, prices, the most efficient available business services, etc.

Such initiatives should build on and synergise with ongoing MIS efforts. In the case of rice, AfricaRice is promoting a rice information system with financial assistance from JICA. It is an integrated system that allows tracking and collecting data on the various links in the rice value chain. Under the supervision of CILSS, the Regional Consultation Framework of West African Rice Producers’ Organisations has developed a light mechanism for collecting rice transaction data in some corridors and rice production areas. The Rice Offensive regional programme states the ambition to amplify and synergize these two major initiatives, to feed ECOAGRIS, the ECOWAS-promoted regional information and decision support system. As such, rice MIS efforts can contribute to the implementation of the Regional Rice Offensive. In the case of livestock, an Information System on Pastoralism in the Sahel (SIPSA) has been developed with involvement of the AGRHYMET Regional Centre of CILSS.²³

Strategic Communication

Finally, it is worth supporting **strategic communication activities around the regional value chain agenda and the related coherence agenda between different policy/investment areas** (agriculture and food security, infrastructure, trade and private sector development). ECOWAS has had limited success in promoting regional integration, and, beyond rhetoric, national, sub-national and individual interests tend to prevail over regional solidarity and approaches in actual choices by both public and private players (with

²¹ RCT are a prospective evaluation method, meaning they are designed at the beginning of a program as a core component of that program. The RCT methodology represents the frontier in terms of high quality evidence of the impact of a program on individual, regional or country level outcomes.

²² The CILSS Regional Market Access Support Programme (PRA/Market Access) mission is to strengthen and expand the achievements of other programs already implemented to enhance fluidity of trade in agricultural and food products and the development of trade in the CILSS / ECOWAS region by the operationalization of a regional monitoring system of trade flows and barriers to regional trade.

²³ Countries covered by SIPSA are Burkina Faso, Mali, Mauritania, Niger, Senegal and Chad. Its development involved a network of stakeholders, including farmers’ organisations, technicians, policy-makers, elected representatives, researchers and NGOs. See for more information on SIPSA: <http://www.cirad.fr/en/research-operations/research-results/2014/sipsa-an-information-system-for-monitoring-pastoral-dynamics-in-the-sahel>

subsequent tensions)²⁴. More needs to be done to build a regional vision, to create awareness of the benefits of regional integration and regional value chain development, as well as to support (public and private) champions that can promote such a vision and coherence agenda. Awareness campaigns (including via newspapers, radios and social media), smart monitoring and evaluation, earmarked support to ‘champions’, as well as advocacy and peer-review mechanisms to create incentives for compliance with regional approaches, are all examples of strategic communication.

Furthermore, an important way to promote the implementation of more enabling policies for regional value chain development (trade, agriculture etc) in West Africa is to ensure that stakeholders in West African agro-food trade, including private actors such as informal traders and smallholder farmers, are adequately informed about relevant policies and policy developments and that they have the capacity to lobby for more enabling policies. **Information sharing, capacity building and advocacy around national and regional trade policies should therefore be an important element of any initiative to promote corridor efficiency in West Africa.**

4.3. Support value chain actors and effective regional public-private cooperation platforms

Support entrepreneurs to take advantage of corridors and engage in public-private dialogues

Regional value-chain development requires the private sector to be in the lead. Therefore **private sector representatives/organizations should be strongly involved in the design and implementation of corridor initiatives**. A set of AMs could provide support to enable entrepreneurs and value chain players to do so, and also contribute to effective regional platforms for public-private cooperation to help to structure and develop regional value chains²⁵.

Effective **support to local actors requires a comprehensive actor mapping** and on this basis a selection of targeted groups to be supported based on their likely impact on sustainable and inclusive development. Households and Small and Medium Enterprises (SME) are often the most entrepreneurial link in the value chain, so policymakers need to see them as potential vehicle for national and regional development rather than as a symbol of underdevelopment (IIED, 2016). Corridor initiatives should be accompanied by specific support for traders associations, especially regional women and informal traders associations, for instance via resource centres at borders providing information to women traders as well as value-chain aggregators, since these are best positioned to connect smallholder producers to corridors and urban markets. Indeed, intra-regional informal trade is mainly conducted by individual traders and micro, small and medium-sized enterprises in border areas who often utilize only small consignments. According to an FAO study (forthcoming), for instance, opportunities for trading processed rice across

²⁴ Examples of cleavages in private sector: rice importers versus local small producers, commercial transport service providers versus small informal traders especially women, exporters to neighbours versus those who want to process locally; between countries: small versus large, coastal versus landlocked, anglophone versus francophone, etc.

²⁵ Many Private Sector regional organisations are involved and actively participate in regional policy processes related to regional value-chains development: Borderless Alliance, the Network of Chambers of Agriculture of West Africa (RECAO), the Association of West-African Agro-Food Exporters (AAFEX), the West-African Grain Network (WAGN or ROAC), the Federation of West African Chambers of Commerce and Industry (FEWACCI), etc. It would be necessary to map their ongoing activities, networks and comparative advantages in order to determine which organization is best suited to co-lead the design and implementation of corridor initiatives.

regional borders hold out a significant untapped opportunity for value chain ‘integrators’ based in Burkina Faso, Côte d’Ivoire, Ghana and Mali.

Support effective regional public-private cooperation

Effective regional public-private cooperation requires **systematic inclusive public-private dialogue**. Many public-private value chain platforms for structured and regular exchanges exist already at national level, although in some value chains and/or countries, these structures are weak. They are rare at regional level. These platforms can be a channel to:

- Bring together national value chain platforms and share lessons learnt, e.g. to address national problems encountered so far with contract enforcement in a highly informal environment (see the case of the rice PPP business models in the region²⁶);
- Address key regional policy issues (e.g. ETLS and CET implementation);
- Deliver on the Strategic Knowledge and Communication Agenda recommended above, e.g. transparency on the continuously changing policy environment (ad-hoc bans, restriction, etc.);
- Facilitate dialogue and share views among all players in the value chains, e.g. to involve consumers and not just producers (e.g. meeting varied consumer demands is a key bottleneck to rice regional value-chain development), and to limit the risks of diverging policies that would weaken national approaches (i.e. convergence of incentives, price policies, etc.).

In the case of rice, this is in line with the Regional Rice Offensive, which foresees strengthening of public-private dialogue. In the case of livestock, the main on-going programmes in the region related to transhumance stress the importance of public-private regional dialogue in order to address transhumance problems (which are mainly regional) and reach concerted agreements. The PRAPS is trying to revitalize the “*cadres de concertation transfrontaliers*”, i.e. multi-stakeholders consultation frameworks, on transhumance. The PRIDEC is based on the premise that continuous dialogue and consultation is required to significantly reduce conflict, through regular meetings in border areas to improve cross-border cooperation. This programme aims to facilitate transhumance in the region, but has a stronger focus on strengthening complementarity and reciprocity between donor interventions, improving the community vision, understanding and management of livestock issues between coastal and Sahelian countries, and preventing risks of rising cross-border conflicts and dissemination of weapons of war. It relies heavily on broad local consultation between Sahelian and “host” countries to promote the implementation of policies and strategic commitments for the development of a modern agro-pastoral farming based on social and economic complementarities.

²⁶ Many PPP schemes have been developed in different countries to develop the rice value chain. Although it’s too early to assess the success of recent private sector/PPP initiatives, some interviewed experts are quite negative about the PPP schemes developed in the region and their potential to promote inclusivity (e.g. benefiting smallholders) in a sustainable manner. Other experts believe that the increasingly strong involvement of the private sector, although still dominated by large international groups, lays the foundation for profound transformations of rice economy, as it helps to structure relationships between the other actors and at the same time it may ensure not only the visibility and the consistency of government interventions, but also the sustainable and sustained recovery of the local rice sector. Problems encountered so far relate to the difficulty of contractualisation in a highly informal environment, the issue of competitiveness in a market flooded by cheap (and good quality) imports, and also the changing policy environment (ad-hoc bans, restriction, etc.).

4.4. Contributing to a stable, conducive and transparent trade policy environment

While the development of flourishing regional agro-food value chains that promote economic transformation and food security in West Africa can be supported by efforts to facilitate intra-regional trade through better performing corridors, the development of such value chains also requires a stable and transparent regional trading environment underpinned by national and regional trade policies that support intra-regional trade. **In the absence of an enabling environment for intra-regional agro-food trade, efforts to improve the impacts of corridors on development will not be sufficient to promote successful regional agro-food value chains** and could simply end up entrenching existing trade patterns, or even promoting increased consumption in West Africa of agro-food imports from outside the region, at the expense of regionally produced products.

The rice sector in West Africa provides a good example of how trade policy can directly impact on prospects for the development of regional agro-food value chains. The recently adopted ECOWAS common external tariff (CET) places milled rice in the 10% tariff band, meaning that rice producers in West Africa will not benefit from significant protection against imports from Asia which have flooded the region in recent years. At the same time, the application by ECOWAS member states of different tariffs in practice (e.g. Nigeria currently applies an import duty on rice much higher than the 10% CET) as well as the use of other tariff-like trade policy tools, such as temporary import or export bans and import quotas, influences the pattern of rice trade in the region, encouraging informal trade flows of rice across borders within the region (e.g. from Benin to Nigeria) and limiting the development of a regional market for rice in West Africa.

Given the importance of an enabling policy environment for promoting regional agro-food value chains, efforts to improve corridor performance in West Africa by addressing infrastructural inefficiencies and red-tape at borders should be accompanied by efforts to promote a more enabling policy environment for regional trade, especially in relation to the use of tariffs and tariff-like measures, such as bans and quotas. Such efforts should seek to ensure that the ECOWAS CET and ETLs are implemented in a way that supports the development of regional agro-food value chains and that individual ECOWAS member states refrain from implementing policies which undermine this goal. Another example of improving the policy environment would be steps to deepen regional integration, for instance through the liberalization and harmonization across countries of financial and banking services (the lack of such regional services between anglophone and francophone West African countries is considered a serious factor hampering free flow of regional trade) that could strengthen the competitiveness of local and regional value chains.

Annex 1: Regional rice and livestock policy frameworks and initiatives

Rice

Regional Rice Offensive

The Regional Rice Offensive has been formulated in the context of ECOWAP and aims to «accompany all national development initiatives and strategies of this sector in order to upgrade production systems, **facilitate regional trade** so as to reduce food dependency of ECOWAS Member States in rice». For its implementation, a regional programme of 404 million USD for the period 2015-2020 has been developed, for which funding is still to be mobilised, with the objective of moving towards West Africa rice self-sufficiency in 2025, which is estimated to require a production of 25 million tonnes of rice, according to calculations of IFPRI and AfricaRice. It is expected to be financed by ECOWAS and UEMOA (100M USD), Member States (200M USD) and the private sector (104M USD). The regional programme should complement national initiatives.

The regional programme promotes a value chain approach, which confirms the need to broaden the current focus on increasing production that still prevails in practice (by addressing issues related to e.g. processing, packaging and access to markets). In this light, envisaged activities include, amongst others: (i) enhance local rice storage capacity; (ii) develop a market information and decision support system; and (iii) support the emergence and operation of multi-stakeholder consultation frameworks at local, national and regional level (to contribute to a proper functioning of the market).

To date, the regional rice offensive has been translated at national level in each country having its own national rice strategy and aiming self-sufficiency. However, given agro-ecological complementarities, experts argue that striving for regional rather than national self-sufficiency is more promising. Only a few West African countries have good potential to become major intra-regional rice exporters.

Livestock

Adopted in 2005, the agricultural policy of ECOWAS (**ECOWAP**) prioritises the livestock value-chain, and in its Axis 1 addresses the management of shared resources, including the management of transhumance and the management of rangelands. Derived from ECOWAP, the Regional Program of Agricultural Investment and Food and Nutrition Security (**PRIASAN**, according to its french acronym) 2016 - 2020, just as its predecessor that covered 2005-2015, includes a component to promote pastoral and agropastoral livestock systems. Key interventions envisaged are to (i) define and implement the ECOWAS integrated livestock development strategy; (ii) secure cross-border pastoral mobility; (iii) promote investments for the development of livestock and pastoralism in coastal countries; (iv) promote livestock feed supply networks and implement the "livestock feed" component of the regional reserve; and (v) assess the impacts of trade policy on livestock products and contribute to its readjustment where necessary. The PRIASAN also includes a commitment to investment in cross-border commercial infrastructure (markets, etc.) across interstate corridors, including in the meat sector. Furthermore, the PRIASAN adds milk, and livestock products more generally (meat, by-products) to the list of regional strategic products, and envisages a 'Milk Offensive', mirroring the Rice Offensive explained above.

ECOWAS also adopted the Strategic Action Plan for the transformation of livestock in West Africa (2011-2020) with one axis addressing cross-border transhumance.

Issues related to pastoralism are also addressed in **AGIR**²⁷ policy tool, developed by ECOWAS in collaboration with CILSS and UEMOA. In its axis "Resilience and Food Security", suggested actions include building infrastructure and equipment related to pastoralism in favor of pastoralists and agro-pastoralists, and strengthening capacities in livestock producing countries and breeding organizations.

The **UEMOA** adopted in 2001 the agricultural policy of the Union (PAU). The PAU has a special focus on supporting breeding and cross-border transhumance, through three main areas of intervention: (i) adaptation of production systems and improvement of the production environment; (ii) deepening the common market in agriculture and management of shared resources; (iii) integration in the sub-regional and global market. The PAU deals with the management of shared resources, including the management of cross-border transhumance. Transhumance issues are managed jointly with ECOWAS and with the technical support of CILSS and the Club du Sahel and West Africa Club (SWAC-OECD).

The **CILSS**, through the CRA (AGRHYMET Regional Centre), has capitalized a lot of information to improve the management of natural resources, including pastures resources. The CRA also has several tools to aid decision in the area of pastoralism and contributes to the implementation of the information system for pastoralism in the Sahel (SIPSA).

While this shows that the region has recognised the importance of livestock and pastoralism in its regional policies and declarations, it must be noted that implementation has been poor and little has been done to sustainably strengthen the livestock value-chain in West Africa.

²⁷ Launched in Ouagadougou in December 2012, AGIR is a framework that helps to foster improved synergy, coherence and effectiveness in support of resilience initiatives in the 17 West African and Sahelian countries. The Alliance is placed under the political and technical leadership of ECOWAS, UEMOA and CILSS and it is based on existing platforms and networks, in particular the RPCA. Building on the "Zero Hunger" target within the next 20 years, the Alliance is neither an initiative nor a policy. It is a policy tool aimed at channeling efforts of regional and international stakeholders towards a common results framework. A Regional Roadmap adopted in April 2013 specifies the objectives and main orientations of AGIR.

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