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AFRICAN UNION DEVELOPMENT AGENCY

AFRICAN CORRIDORS

for investment, food security and climate action

A framing paper




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Building resilient and prosperous Africa.

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This paper discusses the challenges and opportunities of connecting four key policy areas in relation to African food systems and an approach to addressing these to encourage investment on and around transboundary corridors. The paper is a joint product of the African Union Development Agency-NEPAD (AUDA-NEPAD) and the European Centre for Development Policy Management (ECDPM) and is produced in support of AUDA-NEPAD's continental mandate and policy anchoring to ensure alignment with the AU's Agenda 2063.

The policy problem can be broadly captured as follows:

Food insecurity in Africa is very high and agricultural productivity is low on average, contributing to a cycle of low yields and scarce investments

Intra-African trade, necessary to overcome limited market sizes for both inputs and outputs, faces high transaction costs for trade within and between countries, thus limiting the commercial interest in productivity-enhancing investments

Infrastructure, which underpins this trade and market integration, whether along transport corridors or at borders, is needed to help lower the time and cost barriers to food-related trade within and between countries

Climate change affects all of this, by inducing shifts in food production zones and population concentrations and worsening food insecurity, though potentially offering opportunities for "green" technological solutions and climate adaptation and mitigation co-benefits

Promoting policies and investments around *transboundary corridors* offers a means to address the coordination failures that perpetuate these challenges. By focusing public and private attention on connecting food systems, climate, trade and infrastructure policies and investments and linking input, services and output markets along specific routes within and between countries, this public and private cooperation can contribute to improving food security and agro-industrial outcomes, both necessary in the context of increasing climate change effects.

But to do so effectively requires better understanding the interests and incentives of key actors operating in and around those corridors and in the policy areas of food system, trade, infrastructure and climate. This paper offers a political economy analysis toolbox to better identify openings where different public and private investments can help achieve these better outcomes, in a way that is not only desirable but also politically feasible.

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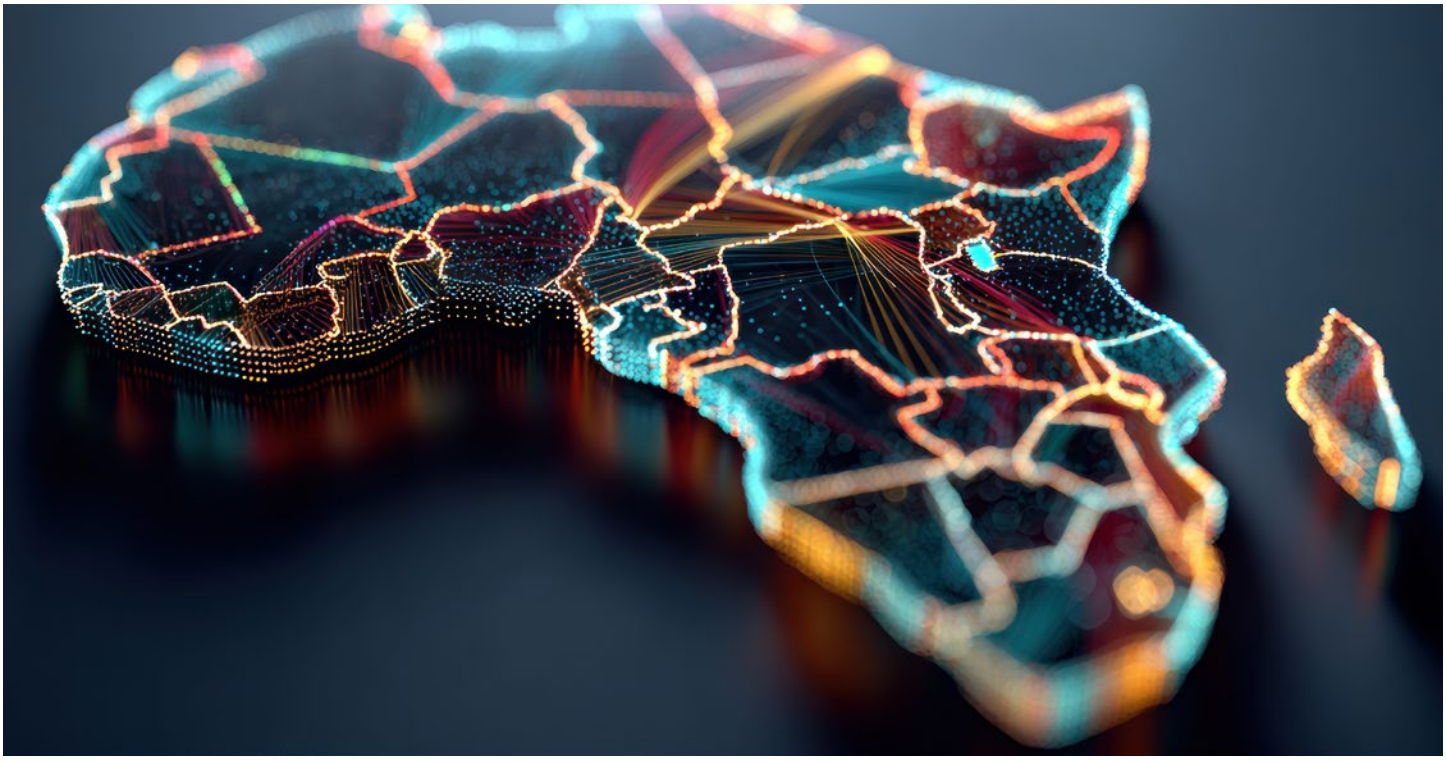
LIST OF ABREVIATIONS

AfCFTA	African Continental Free Trade Area
AGRA	Alliance for a Green Revolution in Africa
AU	African Union
AUDA-NEPAD	African Union Development Agency-NEPAD
CAADP	Comprehensive African Agricultural Development Plan
CAAPs	Common African Agro-Parks Programme
CH^4	Methane
CO^2	Carbon dioxide
DRC	Democratic Republic of Congo
EAC	East African Community
ECDPM	European Centre for Development Policy Management
EU	European Union
FAO	UN Food and Agriculture Organization
N^2O	Nitrous oxide
NTBs	Non-tariff barriers
PIDA	Programme for Infrastructure Development in Africa
RECs	Regional Economic Communities
RRI	Risk-return-impact
SADC	Southern African Development Community
SAGCOT	Southern Agricultural Growth Corridor of Tanzania
SPS	Sanitary and phytosanitary
TCC	Technical Cooperation Collaborative
UAE	United Arab Emirates



INTRODUCTION

This framing paper is a key output for the joint AUDA-NEPAD and ECDPM initiative to assist African countries and regions in integrating climate and food policies and translating them into investment pipelines, with a specific focus on infrastructure and trade corridors – starting with the Lobito, Northern and Abidjan-Lagos corridors. The overall framing is the need to link continental-level mechanisms for international cooperation, partnerships and knowledge exchange with on-the-ground policy and investments.

The paper seeks to provide a framework for thinking about ways to strengthen and capitalise on the connections between food systems, climate resilience, infrastructure, investment and trade initiatives across the African continent. Its starting point is the fragmented nature of the policy and investment approach to operating in these areas, where long-standing interests in transboundary corridors offer a means to concentrate all of these in practice.

Despite continental frameworks such as the Comprehensive African Agricultural Development Plan (CAADP), the Programme for Infrastructure Development in Africa (PIDA), the AU Climate Change and Resilient Development Strategy and the African Continental Free Trade Area (AfCFTA), there is limited coordination in terms of the related policies and their implementation.

AUDA-NEPAD's role in this initiative therefore goes beyond policy framing, to positioning the agency as a continental broker that links African priorities to implementable, investment-ready actions along strategic corridors. Building on its mandates under CAADP, PIDA and the AU Climate Change Strategy, AUDA-NEPAD is uniquely placed to convene ministries, Regional Economic Communities (RECs), corridor authorities, financiers and private actors to align fragmented policy frameworks and translate them into coordinated investment pipelines.

In the context of corridors such as the Northern, Lobito and Abidjan-Lagos Corridors, AUDA-NEPAD's comparative advantage lies in bridging continental frameworks with corridor-specific political economy realities, while safeguarding African agency in engagements with external partners and investors.

While understandable from an institutional perspective, where different sectoral needs and logics shape policies, failure to build on cross-sector linkages risks undermining the efforts to improve food security, climate resilience and inclusive growth.

By way of example, agricultural and food systems plans under CAADP are often not aligned with the Nationally Determined Contributions on climate change (and vice versa), while infrastructure projects rarely consider smallholder farmers' and micro, small and medium enterprises' inclusion or climate aspects. Similarly, the AfCFTA's potential to strengthen food security is undermined by barriers around trade policy implementation and non-tariff barrier removal (Van Gass, 2025). Beyond policy fragmentation, there is also a disconnect between national, regional and continental strategy policy levels. This leads to a disjointed approach that cuts horizontally and vertically, requiring innovative, bottom-up solutions.

The corridors approach, as discussed here, is a potential way to bridge both policy areas and levels in the practical design and implementation of policies and investment projects.

This framing paper therefore seeks to lay out an approach to overcome the policy fragmentation and to improve their connections in policy and in practice to achieve investments that foster competitive trade by improving systems efficiency. This approach will help to reduce risk and increase returns for investors both private and public.

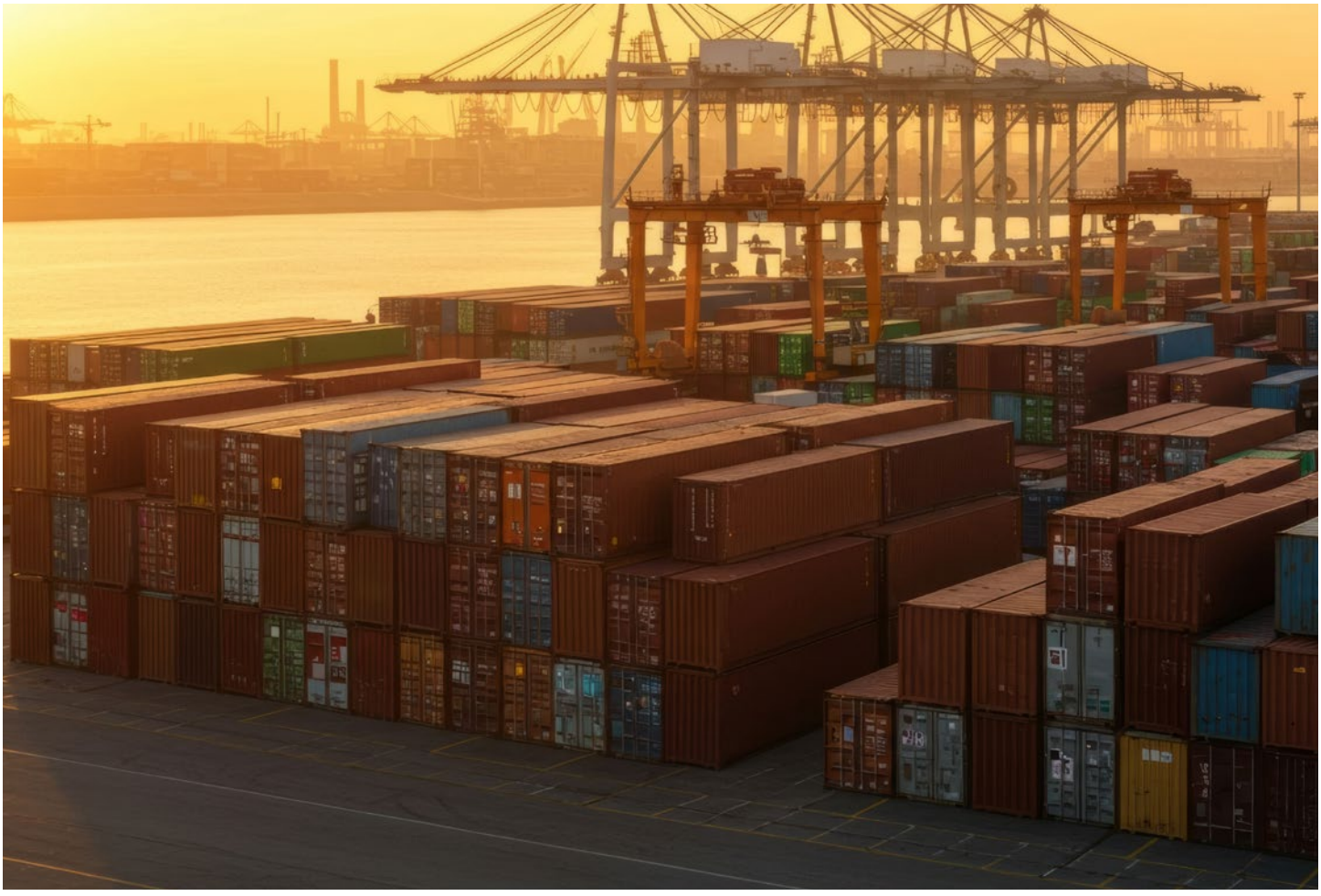
Africa is the continent that suffers most both from climate change and food insecurity. *African agricultural productivity is 60% below the global average while approximately 65% of the continent's farmland is degraded.* As a consequence, food imports are projected to cost the continent US$110-billion annually by 2030. At the same time, Africa is home to around one-fifth of the global agricultural workforce and is projected to have a population of 2.4-billion and be home to 40% of migrants displaced by climate shocks by 2050. This leads some to suggest that the agri-food systems in Africa are "[the] single sector [that] holds the key to closing half of the outstanding sustainable development gaps" (Lamy, Kalibata, Mayaki, 2025).

The fragmentation issue

The challenges are multiple and interconnected. Even if agricultural production is rising, much of it stems from land-use change contributing to deforestation, rather than productivity gains (Van Ittersum et al, 2025). The combination of climate effects with population growth, as well as conflict and economic pressures, mean that access to nutritious meals will remain a challenge for large swaths of the population.

"But one critical issue often gets overlooked: how food moves. Weak transport and logistics systems delay deliveries, drive up costs and increase food waste" (Kunaka et al, 2025). As such, there is a need to sustainably increase production and processing but also be able to move the food smoothly between and within countries to reach markets. But increasing productivity, processing and trade requires both public and private investment. Measures to incentivise investment and trade in agricultural and food inputs and outputs within Africa would help stabilise food supply chains against disruptions caused by pandemics, conflicts and climate shocks, raise incomes and food security, and help to rehabilitate the continent's farmland. Indeed, there may be opportunities for climate change adaptation and mitigation co-benefits from investing in the production of green nitrogen fertiliser. At the same time, one cannot ignore the crucial importance of urbanisation, proximity to cities and the way enterprises cluster spatially, thus connecting to the idea of corridors that can help cluster investments around key transport and market connectors.

As former Alliance for a Green Revolution in Africa (AGRA) president Agnes Kalibata puts it: "Food systems transformation and the private sector's role in it calls for a good understanding of the *relationships within the sector* – ranging from input suppliers to retail and food service providers – and their significant contributions to the domestic, regional and global markets (italics added)(AGRA, 2023). That calls for an approach that offers ways of understanding and working with different actors, interests and incentives.



Past policy responses

The problem of disjointed approaches to food systems, climate mitigation and adaptation, infrastructure and trade integration is not new. But its persistence suggests there is a need for new solutions. Or, at least, new approaches to putting known approaches into practice.

In 2012, on the 10th anniversary of the launch of CAADP, NEPAD (now AUDA-NEPAD) already pointed to the opportunities of connecting food policies with those of trade and infrastructure through regional transport corridors:

> "There is very significant potential to gain from extending transboundary markets – both potential for growth and to increase security and stability. Africa will be more resilient to cope with external and internal shocks if it provides a consolidated continental market. The development of regional markets can be a building block … Countries need more support to identify opportunities and devise realistic strategies, including through investigating the potential for positive spill-overs from collaborative ventures …. The new energy for devising infrastructure 'corridors' needs to incorporate agricultural opportunities and seek synergies. CAADP is also better placed to explore linkages and complementarities with the Programme for African Infrastructure Development in the areas of rural energy, ICT and road networks."[1]

This policy fragmentation was also recognised in 2010 by the Busan High-Level Forum outcome document, the G8 New Alliance for Food Security, the G20 and the World Economic Forum, as well as through initiatives such as Grow Africa and Aid for Trade. As one report put it, "The challenge is how to invest in agriculture, both from a national and international perspective, in ways that not only boost production, but also secure food and livelihoods, create jobs and reduce poverty, recognise the rights of local men and women and at the same time take care of environmental issues" (Kaarhus et al, 2010).

Already at that point, transboundary corridors were offered as a solution. At the Southern African Development Community (SADC) Heads of State Summit in Maputo in 2012, incoming chairperson President Armando Guebuza highlighted corridors as "vehicles for SADC regional integration that need to be harnessed due to the role they play in consolidating social dimensions of development and the regional integration process" (Byiers & Vanheukelom, 2013). This thinking has underpinned initiatives such as the Southern Agricultural Growth Corridor of Tanzania (SAGCOT) (Byiers & Rampa, 2013) and the Beira Agricultural Growth Corridor in Mozambique (Kaarhus, 2018). The AUDA-NEPAD PIDA Integrated Corridor Approach, launched in 2020, picks up on aspects of this, emphasising infrastructure projects that maximise job creation and climate friendliness, while improving connectivity between urban and rural areas (AUDA-NEPAD, 2020). The AfCFTA Secretariat more recently designated five primary corridors for the implementation of the continental free trade agreement:

- *Abidjan-Lagos Corridor*, linking Côte d'Ivoire, Ghana, Togo, Benin and Nigeria
- *Northern Corridor*, connecting the port of Mombasa in Kenya to Goma in the Democratic Republic of Congo (DRC), passing through Uganda, Rwanda, Burundi, Ethiopia and South Sudan
- *Central Corridor*, linking Burundi, Uganda, Malawi, Zambia and parts of the Democratic Republic of Congo
- *North-South Corridor*, a multimodal transport network connecting eight SADC countries: Botswana, the DRC, Malawi, Mozambique, South Africa, Tanzania, Zambia and Zimbabwe
- *Central Africa Corridor* (also known as the Yaoundé-Brazzaville Corridor), connecting the port of Douala to Yaoundé in Cameroon, Libreville in Gabon and Brazzaville in the Republic of the Congo

The first two of these feature in the proposed approach of this project.

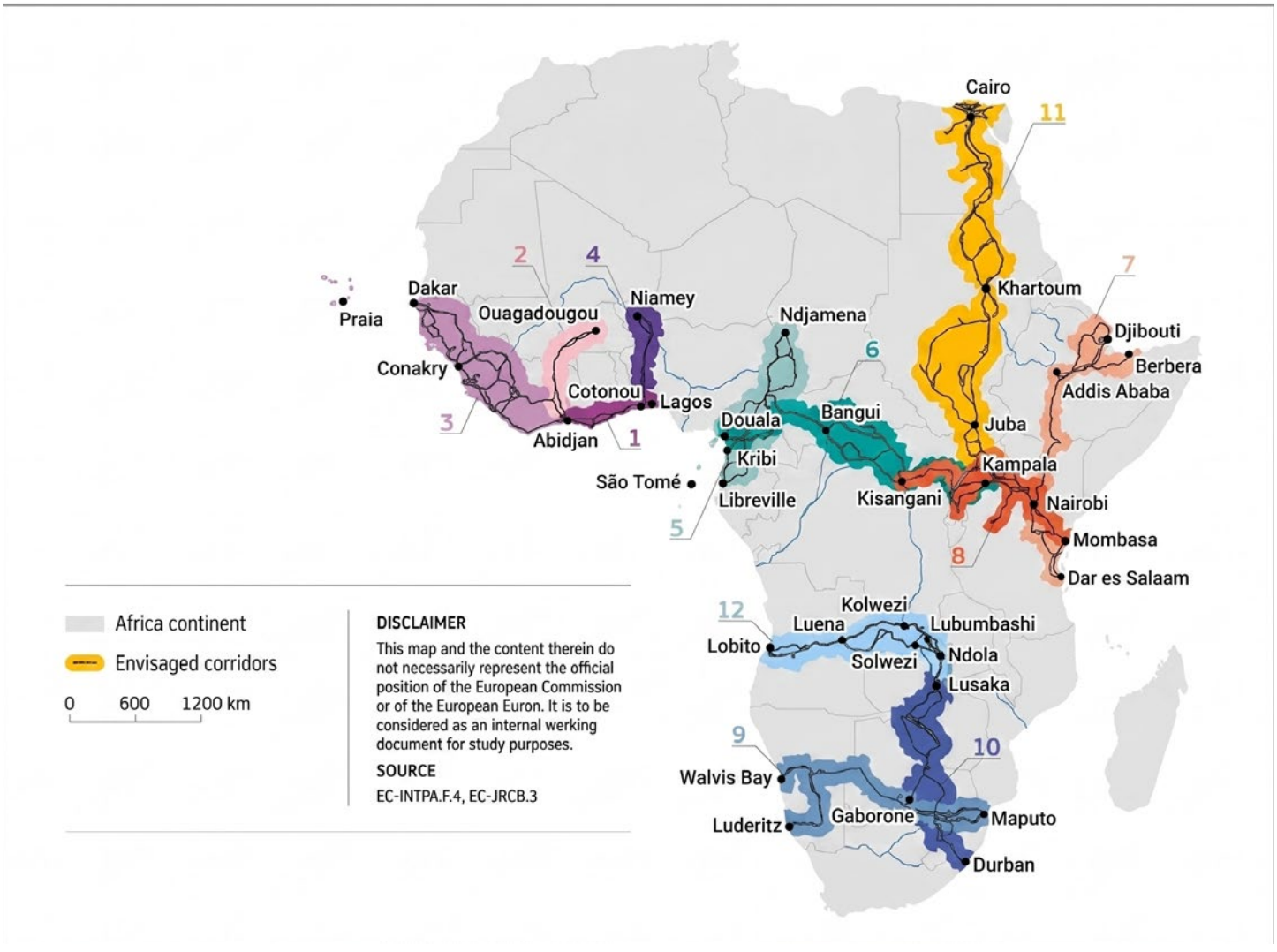
Renewed policy attempts?

More recently, following the UAE Leaders Declaration on Sustainable Agriculture, Resilient Food Systems and Climate Action at COP28 and as part of the G7 Apulia Food Systems Initiative, the Italian G7 Presidency in 2024 committed to promoting coherent policy and investment approaches at the intersection of climate and food systems, especially in climate-vulnerable developing regions.[2] This aligns with Italy and the G7's support for the emerging AU Action Plan on Building Sustainable and Resilient Food Systems in Africa, led by Dr Ibrahim Mayaki, AU Special Envoy for Food Systems. The Action Plan seeks to create synergies between three major African policy frameworks – the CAADP Strategy and Action Plan, PIDA (with a focus on agriculture-led infrastructure) and the AfCFTA – to attract coordinated public and private investment in sustainable food systems, green infrastructure and climate resilience over the next decade.

The EU's Global Gateway strategy in Africa also focuses attention on promoting public and private investment around 12 "strategic corridors". These were selected from 54 existing PIDA corridors, selected according to three criteria:

1. Capacity to facilitate Africa-Europe and intra-African trade
2. Capacity to improve sustainable, efficient, safe and secure connectivity between the two continents
3. Scope to develop diversified value chains in Africa that can benefit both African and European industries (Baranzelli et al, 2022).[3]

Figure 1. EU Global Gateway strategic corridors



Source: Kavalov et al, 2025

Building on these, the current initiative seeks to help inform multi-stakeholder dialogues to support the channelling of new investments to connect the different areas – equipping actors to identify and then transform systemic barriers into opportunities for coherent, inclusive development. As will be discussed below, the proposed initiative will look in particular at the Northern Corridor in East Africa, the Abidjan-Lagos Corridor in West Africa and the Lobito Corridor in Southern Africa, all three of which are designated priority corridors by the relevant African governments and their international partners.

The remainder of this paper is as follows: section 2 delves into the interconnected nature of the problems facing food systems and thus the need for more connected approaches. Section 3 describes a model for thinking about coordinating policies and investments around corridors, and Section 4 lays out how the remainder of the project will proceed.

INTERCONNECTED PROBLEMS AND OPPORTUNITIES

Overview

The above interconnected problems facing the agricultural and food sector are broadly recognised.

A caricatured version of the narrative connects the four policy areas as follows:

- *Food insecurity in Africa* is very high and agricultural productivity is low on average, leading to limited production and processing of agricultural outputs
- *Intra-African trade*, necessary to overcome limited market sizes for both inputs and outputs, faces high transaction costs for trade both within and between countries, thus limiting the commercial interest in productivity-enhancing investments
- *Infrastructure*, which underpins this trade and market integration, whether along transport corridors or at borders, is needed to help lower the physical time and cost barriers to food-related trade within and between countries
- *Climate change affects all of this*, worsening food insecurity and inducing shifts in production zones and population concentrations, though potentially offering opportunities for "green" technological solutions, and thus climate adaptation and mitigation co-benefits

The interconnections outlined above are not abstract policy challenges but concrete coordination failures that might be addressed by adopting a corridors approach. Along strategic transport routes such as the Northern, Lagos-Abidjan and Lobito Corridors, food systems, trade, infrastructure and climate policies intersect spatially but are rarely planned or financed together. As a result, investments that could generate multiple development and resilience benefits instead deliver narrow sectoral outcomes, such as transport infrastructure that primarily serves extractive exports, or agricultural investments that remain disconnected from markets and logistics systems. Recognising corridors as points of convergence makes these interdependencies visible, and creates opportunities for more integrated policy and investment responses.

Delving deeper, one key productivity challenge in Africa stems from the limited use of fertilisers. As Dekeyser and Medinilla (2024) discuss, African fertiliser use averages 32.4kg/ha, with consumption per unit area increasing by 8.5% since the 2006 Abuja Declaration. Countries driving this growth include Ethiopia, Kenya, Nigeria and Mali, where investment in production and blending facilities have seen surges in demand over the past two decades (ibid). This has contributed to the doubling of fertiliser use in Africa over the past decade (Jayne and Sanchez, 2021, cited in Dekeyser and Medinilla, 2024) thus offering the co-benefits of raising productivity in a context of climate adaptation, and minimising the need for deforestation and land-use change. At the same time, green fertiliser production itself offers opportunities for investment and employment.

As a recent UNECA (2025) paper on the AfCFTA highlights, in many parts of Africa, "conflict, political violence, climate change and food insecurity are converging to forcibly displace more people than ever", leading them to examine trade, and in particular the AfCFTA, as a catalyst for human development and peace. Their recommendations are familiar: "raising the productivity of agriculture, diversifying products and markets, developing skills and human resources, modernising technology and infrastructure, re-engineering business processes, creating incentives for small and medium-sized enterprises to expand and move up the technological ladder, improving the investment climate, spurring innovation, and attracting foreign direct investment to complement domestic resources" (UNECA, 2024). Indeed, one of the underlying logics for the AfCFTA is to overcome fragmented input and output markets, across 97% of tariff lines, with a view to encouraging investment to take advantage of larger markets, thus boosting African production capabilities and industrialisation. The rationale behind this is to revise the African economic model, "driving structural economic diversification, shifting economies away from commodity exports towards manufacturing and value-added industries" (Mene, 2025). This also includes a move away from high import dependency from outside the continent.

Beyond input production, food markets are also evolving. According to estimates, Africa's population grew from 580-million in 1990 to 1.42-billion in 2022, while the urban population more than tripled from 145-million in 1990 to 508-million in 2023 (AGRA, 2023), implying rising urban demand for food. Consequently, "by far the largest food market facing the African private sector and farmers is the African urban market, which is far larger than the export market". The urban market food consumption share (in tonnes, not value) in Africa reportedly grew from 28% in 1990 to 43% in 2023 compared with exports, which grew from 3.5% in 1990 to 5%t in 2023, making the African urban market eight times larger than the export market in 1990 and nine times larger in 2023 (ibid). The question is how to link those markets to production areas, within and between countries.

Growing urban density and markets create agglomeration effects, reducing the unit cost of transportation and communications, making agricultural and manufactured products more widely available and contributing to foster innovation (OECD, 2019). This has knock-on effects for employment and livelihoods. Along with this, one sees a rise in the consumption of processed foods and non-grain products, combined with growth of firms engaged in food processing, wholesale and logistics, and crop inputs and animal feed, where the domestic demand and supply of these horticulture and animal products for the African market has grown faster than in Asia or Latin America in the past two decades (Reardon et al. 2024, cited in AGRA, 2023).

In addition to farmers and consumers, who are central to food systems, three main private sector segments need to be taken into account:

1. *Upstream from farmers:* farm input wholesalers and retailers (agrodealers) and emerging outsource agricultural service firms
2. *Downstream from farmers:* agricultural output value chain segments (wholesalers and processors) and downstream segments (retailers and food services/restaurants)
3. *Horizontal with farmers:* supply logistics, packaging and equipment/repair services, and inputs to all segments

Within every value chain there is a wide array of firm types, which then need to connect within and between the above segments and markets. Upper-tier medium and large enterprises represent some estimated 15% of the agri-food value chain volume in Africa, processing for and marketing to domestic as well as export markets, including multinational firms such as Cargill or COFCO, but also African firms.

One aspect of economies of scale comes from clustering such value-chain components. This can occur through "spontaneous" clusters that emerge with little government intervention - including fruit and vegetable clusters in Ethiopia, Nigeria, Tanzania and Zambia (Reardon et al, 2024) - while initiatives such as "agroparks" being promoted by the AU seek to reproduce their benefits through deliberate intervention (AGRA, 2023).

All of the above raises issues around coordination and transaction costs. High transport and logistics costs within and between counties, whether due to poor infrastructure, trade barriers or uncompetitive markets all undermine the potential of connecting rising and shifting production and productivity to evolving urban and expanding regional markets. Luke (2025) cites work showing that improving rural road infrastructure leads to higher agricultural production and, as a result, higher incomes, while studies have found a positive correlation between improved distribution services and increased food security.

Evidence from African corridors reinforces that food insecurity is not only a production problem, but also a market access and logistics problem. High transport costs, weak logistics services and fragmented border procedures along corridors raise food prices, increase post-harvest losses and discourage private investment in both inputs and processing. Along corridors, these constraints limit the ability of surplus-producing areas to supply deficit regions, while they also constrain the emergence of regional food markets beyond mineral exports. Addressing these bottlenecks therefore represents a critical entry point for simultaneously improving food security, trade integration and climate resilience.

As discussed above, continental policies have been in place for many years to address these challenges: through CAADP for agriculture; PIDA for infrastructure, the AfCFTA (and regional free trade agreements) for trade and trade facilitation, with climate strategies now also emerging at the AU and regional levels. The issue remains that of fragmentation, which in turn can create other barriers.

One of the main conclusions from analyses of the AfCFTA is that tariff liberalisation is only a small part of the measures required to boost intra-African trade, while most gains will come from addressing non-tariff barriers (NTBs) (Byiers et al, 2020). For instance, while sanitary and phytosanitary (SPS) requirements are crucial to ensure public health and safety, when not sufficiently harmonised they can make the flow of food between countries unnecessarily difficult, while other NTBs refer to non-standard practices that hinder trade flows across borders.

The need for progress is highlighted by Luke (2025): intra-African suppliers meet only 28% of import demand for agricultural inputs, 18% for agricultural raw materials and 16% for food, the remainder coming from outside the continent. Nonetheless, as he also highlights, African countries trade more among themselves in agricultural goods than in other products, meaning significant potential for intra-African trade gains in foods.[4]

Climate change further amplifies the need for integrated corridor-based approaches. Shifting rainfall patterns, rising temperatures and more frequent extreme weather events are altering production zones and increasing volatility in food supply. Without coordinated investments in climate-resilient agriculture, and storage, processing and transport along corridors, these shocks translate into higher food prices, increased import dependency and greater vulnerability for urban consumers. Corridors can then be seen as practical platforms for aligning climate adaptation investments with trade facilitation and infrastructure planning, enabling scale effects that individual national or sectoral interventions cannot achieve on their own.

Together, these different aspects all underline the importance of finding approaches that can turn interlinked challenges into interlinked opportunities, where corridors appear to offer a potential way forward.

REVISING THE MODEL

A corridors approach would help overcome many of the challenges above by offering a narrower geographical scope to focus policy efforts and investment promotion. Value-chain integration is not only about promoting international and regional integration but also market integration between rural producers, communities, villages, districts and provincial towns, where a corridors approach can connect all of the different segments and actors within and between countries.

Overall, this implies making connections between actors operating at various junctures:

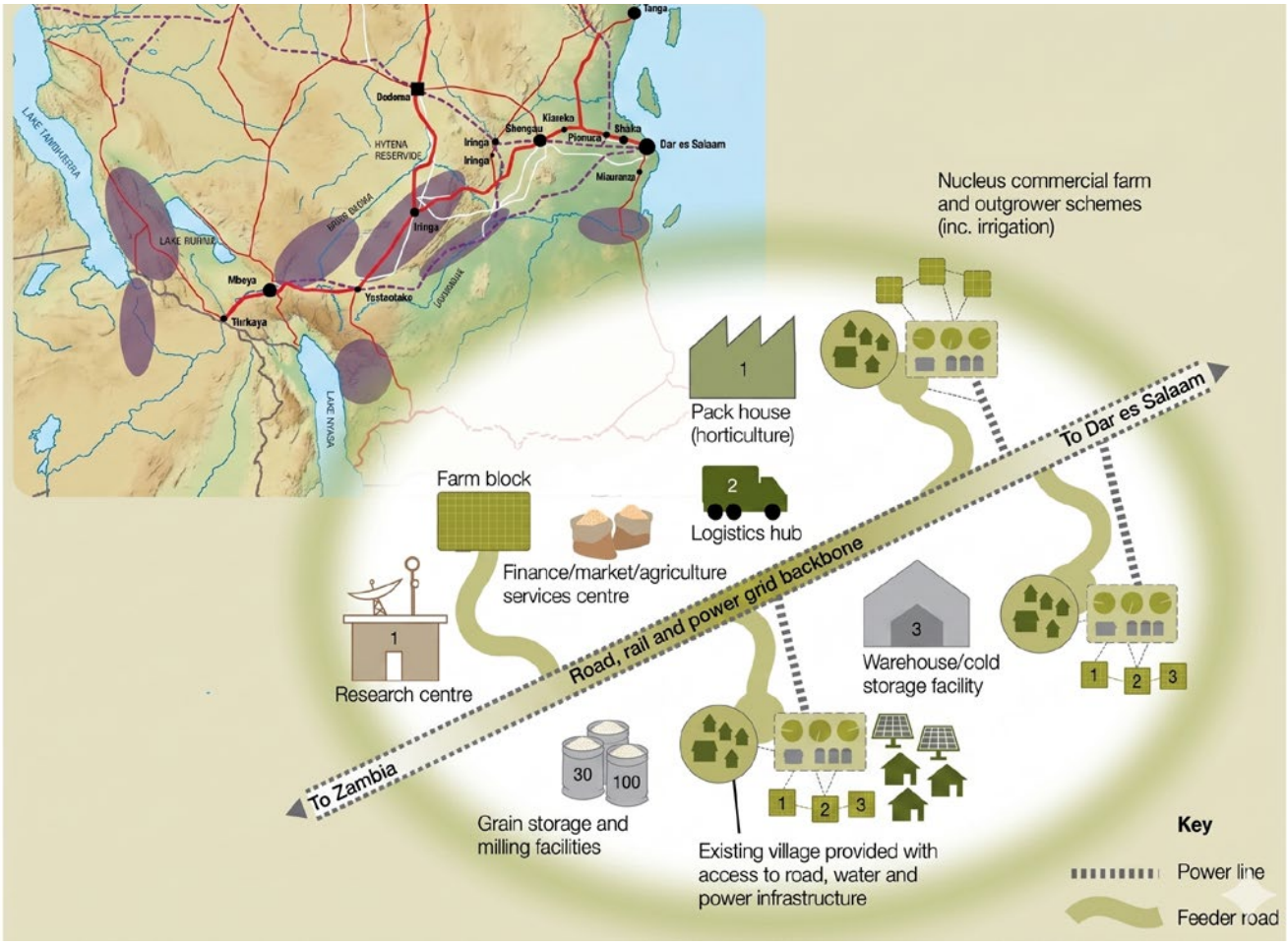
- Between public and private investments
- Between sectors
- Between and within states

Doing so through corridors arguably represents the greatest opportunity for overcoming the policy fragmentation above that undermines food production and trade outcomes.

SAGCOT: lessons from a public-private approach

One corridor initiative stands out in particular as an attempt to coordinate policies and private and public investments for agricultural production, processing and market integration. Even if progress has been slower than initially hoped at its launch at the World Economic Forum in 2010, the Southern Agricultural Growth Corridor of Tanzania (SAGCOT) sought to provide an investment blueprint around the existing TAZARA/Uhuru transport corridor, linking major international companies operating in input markets (imported fertiliser in particular) with farmers, investments in post-harvest storage and cold chains, processing and last-mile infrastructure around pre-identified production clusters, as illustrated in Figure 1 (Kilimo Kwanza, 2011). The SAGCOT blueprint also foresaw public finance for a catalytic fund of US$50-million for start-up agribusinesses incorporating smallholders; "patient capital" to finance the cost of "last mile infrastructures" such as farm roads and irrigation connections; and loan guarantees and currency risk instruments to leverage capital from the banking sector (ibid).

Figure 2. SAGCOT agricultural growth corridor and clusters



Some suggest that the SAGCOT initiative failed to meet its objective of attracting new large-scale enterprises, building instead on pre-existing firms (Pauline et al, 2023). At the same time, others report that large-scale investments have restricted access to land for existing smallholders who have either no knowledge or interest in engaging with the initiative due to past bad experiences with large-scale investments (Fiechter et al, 2024; pp230-254). But even if the conclusions from the SAGCOT experience are mixed, the thinking behind it offers interesting perspectives for other corridors around Africa with similar broad ambitions.

The political economy aspects are crucial for going forward. For instance, in the case SAGCOT, Byiers and Rampa (2013) show how despite the close coordination with the private sector, the initiative was perceived to overly depend on a single political figure – President Jakaya Kikwete – rather than a broader coalition of champions. Upon his departure from office, despite the capacity-building efforts supported by development partners, the implementation of the blueprint slowed and even stalled.

For such endeavours, operating with multiple actors across sectors and levels, there is a fundamental need to understand actors and interests, and the underlying structures and institutional frameworks shaping those. The SAGCOT Corridor was partly driven by powerful international agri-businesses and presidential buy-in, but struggled to make linkages with small-scale businesses and farmers on the ground.

The major question then is how to promote and ensure widespread dialogue and investment to coordinate between sectors and countries, to reap the developmental benefits that should come from combining food, infrastructural, trade and climate policies.

EXPLORING NEW CORRIDOR OPPORTUNITIES

This initiative builds on the above thinking, to look at ways of synergising the fragmented food-trade-infrastructure-climate policy and investment plans and initiatives for three corridors in Africa, with one study at the continental level. In each case we look for "low-hanging fruit", where the corridor approach might help catalyse investments targeting at once agricultural development, food security and climate resilience.

4.1 East Africa: from (extra-regional) import and export of food inputs and outputs to intra-regional food trade and climate action along the Northern Corridor

Green industrialisation is a top priority for many African governments that seek to leverage renewable energy, to attract investment in green industries such as hydrogen, iron and steel. Meanwhile, *climate adaptation remains critically underfunded, despite estimates that inaction could cost the continent up to US$50-billion annually by 2050*. A key challenge lies in making adaptation, especially in Africa's climate-vulnerable agrifood systems, a compelling, short-term investment case.

At the same time, the stalled agricultural productivity growth discussed above itself drives three challenges: high emissions and biodiversity loss from carbon-intensive land-use change; growing food import dependency; and low resilience to climate shocks. Addressing this through green industrialisation and agricultural adaptation would mean taking these as two sides of the same coin, with progress in one accelerating gains in the other.

Within that context, this initiative, through analysis and dialogue facilitation, will map relevant policies and processes, consult key actors and partners, and broker proposals for investments and policy packages along the Northern Corridor. These will seek to simultaneously target enhanced food security, climate resilience and intra-regional trade.

For instance, we will illustrate the potential joint gains through the example of low-carbon fertiliser production and trade around the Northern Corridor in East Africa. The Northern Corridor connects the port of Mombasa in Kenya to the hinterland countries of Uganda, Rwanda and the DRC. Not only does it connect key countries within the East African Community (EAC) customs union, but for several years reflected a "coalition of the willing" among political leaders (e.g. AfDB, 2015).

While the Northern Corridor forms a part of regional corridor competition between Kenya and Tanzania to serve hinterland countries and regions (via respectively the port of Mombasa and the Dar es Salaam port for the Central Corridor), it also offers opportunities to combine sustainable agricultural development with green industrialisation, and food security resilience with intra-African trade. For instance, investing in green ammonia production can reduce fertiliser costs by lowering transport costs, enabling agricultural modernisation that boosts yields, improves food security and builds climate resilience by helping safeguard forests and other critical ecosystems. At the same time, this can create important lead markets for Africa's emerging green industries, turning the adaptation challenge into a driver for green industrialisation. The regional dimension through the Northern Corridor offers the possibility of achieving the scale necessary for industrial investments and climate resilience through interlinkages and lower transport costs for drought-prone regions. *Kenya*, for instance, *is considered to have the potential to become a green hydrogen centre*, supplying clean fuel to neighbouring countries and beyond, consistent with the Vision 2030 trade aims but also regional energy frameworks such as the EAC's energy masterplan+ (KIPPRA, 2025).

Overall and given investment planning for green ammonia has also started in Uganda, the Northern Corridor has the potential to stimulate investment in green hydrogen for fertiliser, in the medium term raising agricultural yields and lowering land use pressure. That offers an opportunity to jointly address climate mitigation and adaptation. By combining policies and investments around the Northern Corridor, a positive outcome for this would imply more investment in processing, less import dependency, smoother, lower-emissions trade, lower trade transactions costs, more productive employment and well-served (urban) food markets.

4.2 Southern Africa: from mineral extraction to food security and cliate resilience along the Lobito Corridor

As part of their green industrialisation ambitions, *many African countries are developing initiatives to exploit their minerals and maximise value addition*. In this context, the Lobito Corridor connecting Angola to the DRC and Zambia is seen as a key initiative, albeit with heavy external interests, including from the EU (see Karkare & Byiers, 2025). But it also has the potential to go beyond mineral extraction to support sustainable investments in climate-resilient agrifood value chains. This entails exploring investment opportunities and policy reforms to connect existing and planned corridor infrastructure with the wider agrifood, trade and climate agendas.

However, although there is a political commitment to broaden the Lobito Corridor's use-case beyond minerals to agriculture, resilient food systems, energy and other sectors, the Lobito Atlantic Railway consortium, operating the existing brownfield railway, is primarily focused on mineral transport, so that for agricultural investments there would need to be a commercial case to be made. As different studies underline, (e.g. Karkare & Byiers, 2025) the main interest in foreign agricultural investment around the Lobito Corridor is primarily in Angola, with international investors primarily interested in producing for export outside Africa.

This raises a dilemma: value chains that foreign investors see as profitable, such as avocadoes, are not the priorities to enhance food security in the region, nor suitable for regional trade due to bad connectivity and limited purchasing power. At the same time, those value chains that have scope for regional expansion, and would strengthen both food and nutrition security and climate resilience, such as beans, are of limited interest to foreign investors. The challenge then will be to better link the perceptions and interests of foreign partners with those of local public and private investors; and see how different policies and investments connecting agri-food and trade can be combined, taking particular account of the Lobito Corridor backbone investment and shifting production and market zones due to climate change.

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4.3 West Africa: resilient urbanisation and regional food markets around the Abidjan-Lagos Corridor

The West Africa case offers a vehicle to look at how the food-trade-infrastructure-climate nexus plays out in the context of connecting rapidly urbanising markets along and around cross-border corridors. Indeed, the EU's Global Gateway Corridor report finds a "potential high-productivity cluster" in Western Africa, taking the combination of the Abidjan-Lagos, Praia-Dakar-Abidjan and Abidjan-Ouagadougou corridors (Kavalov et al, 2025).[5] It has by far the highest population density of all the EU-designated corridors – more than double the next most densely populated corridor – thus underpinning a potentially large market for food products.

As a recent OECD report (OECD, 2025) highlights, *urban areas are at the forefront of intra-regional food trade in West Africa,* with urban consumers *spending 50% more on food than rural consumers and purchasing 90% of their food consumption*. That offers massive market opportunities if the costs of production and movement of food can be brought down, even in the context of climate change.

Within this dynamic, there are moves towards investment in processing as regional demand shifts towards fresher, more perishable and also more processed foods. That then implies a need for parallel business services such as warehousing, cold storage, food preservation, processing, packaging and logistics, on and around corridors, also involving more intermediaries to allow foods, including fresh products, to travel longer distances across the region. According to the OECD report, *Senegal, Ghana and Côte d'Ivoire account for a third of regional trade with 58%, 48% and 39% of their trade respectively, beyond immediate neighbours*. As the OECD report remarks, food products that are widely produced, consumed and traded in the region, such as millet, sorghum, livestock, fish, cowpea and vegetables, have received little policy attention. Further, the role of the intra-regional corridors in supporting this trade merits further attention for policy, but especially investment promotion.

At the same time, West Africa is one of the most vulnerable regions to climate change impacts, nationally but also transboundary. Mauritania, Guinea and Togo have been ranked among the top 15 countries worldwide for exposure to cross-border climate risks (Adaptation Without Borders, 2025). They propose the innovative application of multilateral adaptation finance to support strategic grain storage and other measures to build regional resilience to international food price shocks.

Together these highlight the need to think more about how to coordinate food-related and climate-related investments around ongoing trade facilitation measures on and around the Abidjan-Lagos corridor. This component of the project will therefore look at ways to strengthen climate resilience and food system sustainability along the Abidjan–Lagos corridor, including by using the cassava and other specific value chains as a lens to examine the climate-food-trade nexus, taking account of transboundary climate risks and opportunities at the water-energy-food-ecosystems interface, while fostering multi-stakeholder dialogue to co-create coherent policies that align trade, food and climate objectives. *Despite strong domestic efforts, for instance, the region produces only about 60% of its rice needs, with demand rising 6% annually*. Nigeria, Ghana, Côte d'Ivoire, Benin and Togo all face different production challenges, with Côte d'Ivoire and Benin heavily reliant on imports.

The proposed analysis and dialogue will serve to identify a pipeline of bankable investments that can help demonstrate how investing in solutions with co-benefits for water, energy, food and ecosystems at critical points in specific value chains, such as rice or cassava, creates a virtuous cycle of resilience and decarbonisation in a context of regional insecurity, large-scale informal trade, displacement and rapid urbanisation. Cassava may represent a compelling entry point for corridor integration due to its climate resilience, role in food security and growing industrial demand for starch, ethanol and high-quality flour. Its industrial use, as well as niche uses, such as in gluten-free pasta, make it also an interesting export crop.

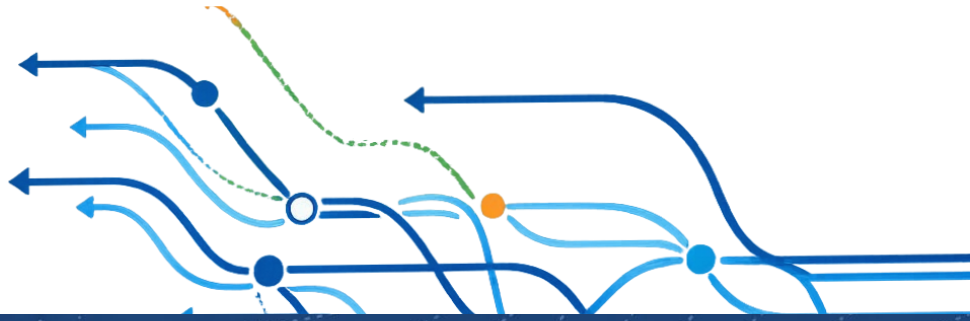
4.4 Continental level

Finally, beyond the three corridor initiatives, the project looks at how to support and enhance the benefits of connecting food security, climate resilience, infrastructure, investment and trade actions across Africa through continental-level coordination. While the corridors represent "bottom-up" thinking about connecting the different policy agendas, there is nonetheless an opportunity to think about the continental level policies and processes.

For this, we will complement the above processes with a concise mapping of AU continental policies, strategies, investment plans and key institutions involved in the flagship continental frameworks (CAADP, PIDA, AfCFTA and AU Climate Change Strategy), also based on existing literature and previous assessments.

The aim is to analyse their policy ambitions and policy-to-practice gaps, as well as drivers and opportunities for their implementation, with a view to helping operationalise the food, trade, climate and infrastructure nexus. Because of their potential role in stimulating investments around corridors, this includes preliminary analysis of the Common African Agro-Parks Programme (CAAPs), focusing on bottlenecks and potential key critical enablers, as well as on how the continental frameworks can support the implementation of the corridor approach to support agro-industrial development and trade. Finally, the report will develop context-specific recommendations to enhance policy integration, fostering a more coherent and effective approach to Africa's transformative development.

By combining these continental level policy processes with regional corridor initiatives and real private sector dynamics on the ground, the aim is to find ways to adapt such continental frameworks to help underpin more investment-focused policies drawing lessons from the different corridor experiences.



THE POLITICAL ECONOMY ANALYSIS AND DIALOGUE TOOLBOX

The challenge of overcoming policy siloes often relates to basic, administrative, coordination failures. But as highlighted, it also relates to the interests and incentives of key actors who may benefit from the status quo, what some have referred to as "profitable inefficiency" (Lamarque, 2019). As a series of corridor studies have shown, *the political economy dynamics within and between countries are often key in shaping the degree to which corridor ambitions are met*.[6] In order to make these more explicit, we propose a political economy analysis framework using five analytical lenses.[7]

Political economy analysis is not an academic exercise but a practical way to inform dialogue, sequencing and coalition-building around corridor investments. Experience across African corridors shows that technically sound projects often stall when they overlook power relations, distributional impacts and incentive structures that shape decision-making by public authorities, corridor operators, financiers and private firms. Embedding political economy analysis within the AUDA-NEPAD-supported dialogue processes allows these dynamics to be surfaced early and addressed through adaptive policy design and investment packaging.

Political economy analysis is indeed concerned with the practical interaction of political and economic processes in a society: the distribution of power and wealth between different groups and individuals, and the processes that create, sustain and transform these relationships over time (OECD-DAC). This helps understand the reasons for resistance to change, as well as "what those with power want (or don't want), and where positive change is emerging and why" (Nash et al, 2020).

Structural factors are embedded in historic, geographical, demographic and economic characteristics, and are usually very hard or impossible to change; Institutional factors are the "*rules of the game*", including formal rules codified in laws, regulations, agreements, etc. and informal structures, which are beliefs, norms and practices (e.g. rent-seeking, informal state-business relations). These both shape the *space and agency of actors* and the incentives they face to promote corridor-related policies, whether political, government, private sector or external actors. Among these, those who stand to lose may block reforms, while those who stand to win may support – requiring that corridor initiatives navigate these. In addition, *external factors* have an impact, in the form of exogenous forces that affect domestic dynamics and political economy, including long-term trends (e.g. climate change) and shocks (e.g. Covid-19).

Finally, the way these play out along or around a corridor differ depending on *sectoral factors* that relate to their political salience, such as infrastructure construction, roads checkpoints, customs and One-Stop Border Posts.

This toolbox will be used to structure inclusive, corridor-level dialogue among public institutions, corridor authorities, private investors, farmer organisations and development partners. Rather than seeking consensus on abstract policy goals, these dialogues focus on identifying politically feasible investment and reform packages that align actor incentives while advancing food security, climate resilience and trade objectives. In practice, this means recognising where interests diverge, such as between mineral-focused corridor operators and food system stakeholders in the Lobito Corridor, and designing complementary interventions that lower risks and clarify returns across sectors.

Through, and beyond, this project, this political economy and dialogue toolbox will be part of AUDA-NEPAD's ongoing support to Member States and RECs, using corridor initiatives as practical entry points for reform. In targeted corridors, previous assessments show that technically sound investments fail where actor incentives, power relations and distributional effects are not addressed. Embedding political economy analysis within AUDA-NEPAD and ECDPM-led dialogues helps ensure that corridor-based food system investments are not only technically viable, but politically feasible and locally anchored.

Figure 3. Five lenses for political economy analysis

Five lenses of the political economy framework and key questions

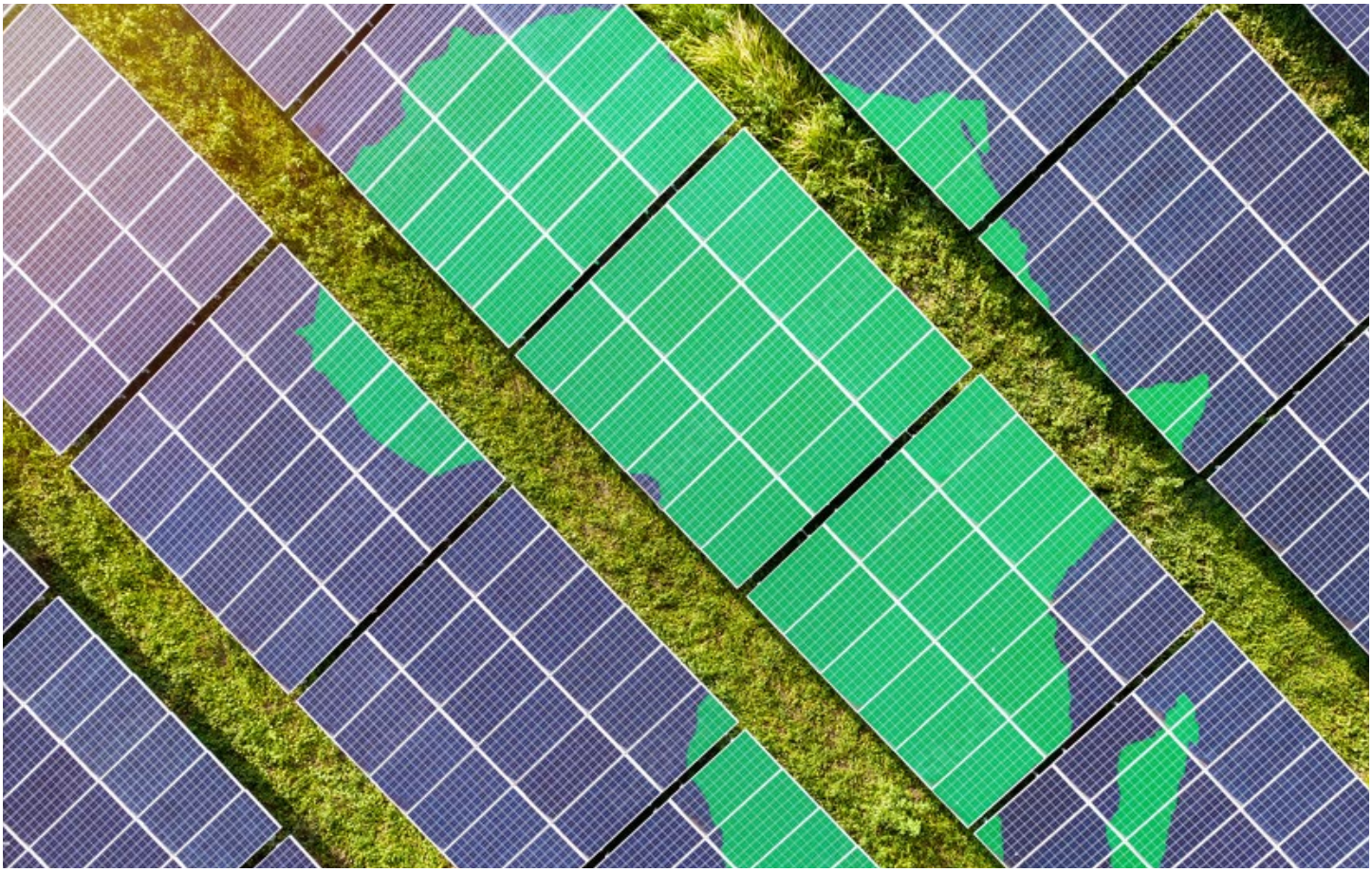
POLITICAL ECONOMY LENSES	RELATED KEY QUESTIONS
STRUCTURAL OR FOUNDATIONAL FACTORS	▶ What are the hard-to-change, long-run, geographical, economic and historical factors affecting current regional dynamics in the thematic area?
FORMAL AND INFORMAL RULES OF THE GAME	▶ What are the formal policies, mandates and rules of the game (laws, regulations, treaties, budget processes, transparency, accountability, compliance rules or mechanisms) ▶ What are the informal norms, the ways of doing things, beliefs, customs? ▶ What are the interactions between the two, and what is amenable to medium-term reforms or change?
ACTORS, AGENCY AND INCENTIVES	▶ Which are the main groups and coalitions of actors that affect and are affected by the policies being analysed/discussed and how do they interact with the regional organisations? ▶ What are the incentives driving the main interested groups and actors and how do these interact with the formal/informal *rules of the game*?
(SUB)SECTOR SPECIFIC TECHNICAL AND POLITICAL CHARACTERISTICS	▶ What is the nature of the policy area and how does implementation take place – is it politically salient, physically visible, or less tangible? ▶ How does the nature of the policy area affect the motives, choices, and roles of ruling elites and coalitions and their engagement with state bureaucrats? ▶ What are the governance and power dynamics that are particular to the sector or policy area?
EXOGENOUS FACTORS	▶ What are the main relevant "global" and other external factors that affect regional integration processes or regional organisations? ▶ How do these external factors influence the domestic incentive environment ? ▶ In case of regional organisations, what roles do donors play? How and why do they support and affect regional agendas and implementation?

By looking at the interaction of these different lenses, and asking the questions listed above, this helps to systematise information on what actors and factors shape corridor outcomes and how. This then allows a more structured way of looking at future options, with the public and private sector actors who might be encouraged to engage in and around a specific corridor. For this we also propose the following "5 As".

Figure 4. 5 As for designing future approaches

- **Alter** the influence of particular factors
- **Adapt** reform interventions to current interests, incentives or constraints
- **Avoid** approaches and modalities that are likely to be blocked. Gauge the potential costs and benefits of alternative processes
- **Await** more conducive conditions for reforms to succeed
- **Abandon** efforts altogether

These political economy 5 Lenses and 5 As will guide the activities and other tools of this project, in order to map relevant policies, investment plans and key actors/partners along the Lobito, Northern and Abidjan-Lagos Corridors. Building on this, we will put forward a limited number of politically feasible business cases in each corridor, for investments and policy packages to simultaneously target enhanced food security, climate resilience and intra-regional trade.

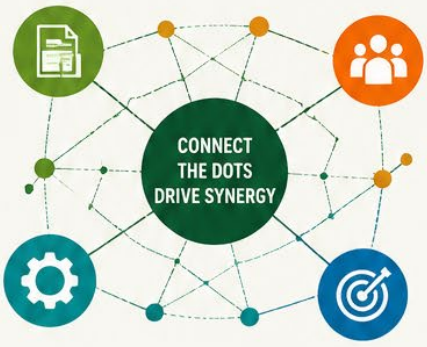


TOOLS FOR FUTURE APPROACHES

1. In-country missions, informal online consultations and off-the-record group validation sessions, to develop **politically aware analysis and context-specific recommendations** to enhance synergies across these four thematic areas

2. The facilitation of **multi-stakeholder dialogues and partnerships**, at different geographical levels, between policymakers, financiers and businesses **to unlock funding (including blended finance)** for the business cases and investable pipelines identified for each of the corridors

3. Specific efforts and activities to **avoid repetition and duplication** of existing analyses and initiatives, and to rather **connect the dots and synergise ongoing processes** and proactive stakeholders therein



This Political Economy Analysis and Dialogue Toolbox will not only be applied to the CAADP, PIDA, ACFTA and AU's Climate processes, but also to international cooperation and partnership processes such as the EU Global Gateway. Starting from the African policy frameworks and the investments proposed by African actors, we will thus support the possible matching between these locally owned plans and the investment in those regions envisaged under such international partnership processes.

The business cases identified in each corridor will be articulated by putting forward, for each for them:

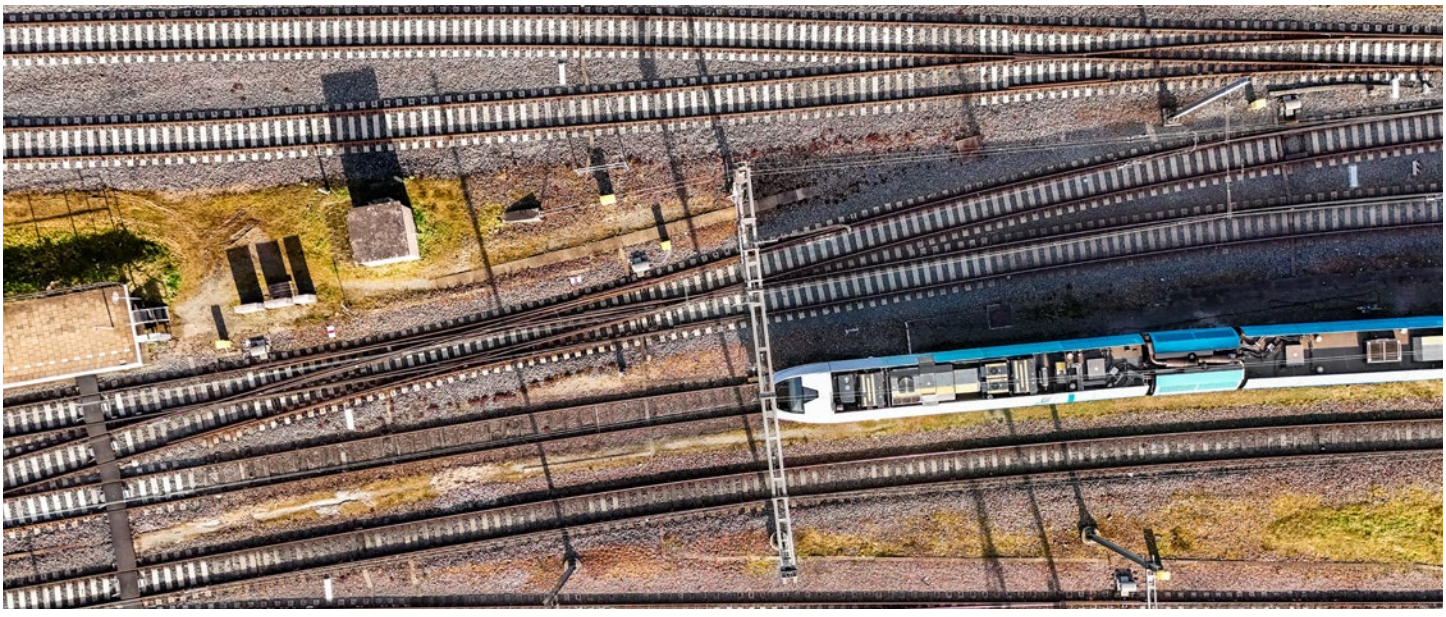
A) (i) A politically savvy vision of why investment should flow into the selected value chains or sub-sectors; and (ii) a cluster of concrete investment opportunities for relevant stakeholders
B) A combination of (i) policy reforms, (ii) (blended) finance mechanisms and (iii) multi-stakeholder platforms

In the final stages of the project, this toolbox will be used to broker collaborations among interested partners that will hopefully create the conditions for further activities, such as tailored trade and investment missions and business forums, to facilitate connections between African and European businesses and investors, and contribute to the creation of regional food markets that today aren't there yet.

As mentioned above, while public investors and international donors are in principle available to support food security and climate action, a key challenge will be identifying international/European private investors willing to invest in food value chains focused on regional markets. This relates a lot to risk perceptions, relatively small volumes of regional exports and the challenge of integrating markets.

To respond to such a challenge, our initiative will also seek to clarify the related returns on investment and scaling readiness; and promote the exploration of investment assessment approaches that could calculate risk-return-impact (RRI) taking into account all project goals in the four thematic areas. Therefore, not only short-term profit but also climate, ecosystem and food-nutrition-security objectives, while contributing to increasing trade flows. In this way, the approach could serve as a software enhancement of the hardware of existing African infrastructure development plans.

For instance, investing in the (smallholder-dominated) beans value chain along the Lobito Corridor may have lower financial return in the short term, or seem riskier (e.g. compared to exporting avocado to the EU). However, it also reduces the risks of soil degradation and climate disruptions, decreases emissions impacts, and has a positive effect on women's income and nutritional outcomes. Moreover, if combined with transport cost reduction of corridors and given huge demand in African cities, this investment would also be (intra-regional) trade enhancing. Such improved RRI assessments could make the business cases and investment opportunities put forward through our project more attractive also for (innovative) international and European private investors.



CONCLUSIONS

The corridor approach outlined in this paper provides a practical pathway to operationalising Africa's major continental frameworks in contexts where policy fragmentation and investment risks remain high. Overall, while corridors offer an approach to overcoming a range of coordination problems – in terms of public and private initiatives and investments – in practice this is complex to carry out.

Collaboration and coordination among the many different actors are required to engage in value chain coordination, crossing borders and using road and rail connections all entail multiple actors and interests. This analysis underscores that corridors are most effective when treated as integrated development platforms rather than transport routes. Realising their transformative potential for food security and climate action requires politically informed coordination across sectors, borders and investment actors. By combining corridor-level political economy analysis, multi-stakeholder dialogue and investment facilitation, *AUDA-NEPAD and ECDPM can help ensure that Africa's corridors become engines of sustainable agri-food transformation, climate resilience and intra-African trade*, anchored in African priorities and capable of leveraging, rather than being shaped by, external partnerships and investments.

However, encouraging investors to intervene where the wider business environment remains a challenge and where markets for inputs and outputs are product- and producer-specific, is a big ask. Access to improved agricultural support services and a supportive business environment remain a key necessity for domestic farmers, with the challenge of engaging with smaller producers still very much present. Although a corridors approach may be able to help overcome this by providing a narrower geographical focus to policy efforts and investments to address these aspects, it nonetheless requires consideration of mechanisms to benefit all public and private actors.

Indeed, realising the full, transformative potential of the corridors for food security and climate action will require a paradigm shift towards truly integrated and coherent policymaking and implementation, moving beyond sectoral siloed approaches and prioritising synergistic investments that link infrastructure development with agricultural modernisation, climate resilience, trade facilitation and local value addition; coordinated funding, especially blended finance, should specifically target climate action and regional food value chain development; and multi-stakeholder platforms should be associated to the corridors processes to guarantee inclusivity and monitoring of actual impact.

The conceptual framing, operational approach and methodological toolbox of the project outlined in this paper will hopefully offer concrete contributions to these efforts.

FOOTNOTES

[1] Established by the AU Assembly in 2003, CAADP's commitments included a promise by all governments to increase public investment in agriculture to a minimum of 10% of their national budgets and to target agricultural growth of 6% per year. This was to be based around four key pillars: (1) Sustainable Land and Water Management; (2) Market Access; (3) Food Supply and Hunger; and (4) Agricultural Research. At the same time, the AU Joint Conference of African Ministers of Agriculture and Ministers of Trade, held in November 2012, was titled "Boosting Intra-African Trade: A key to Agricultural Transformation".

[2] As part of this, Italy pledged financial support to the Technical Cooperation Collaborative (TCC), a multi-year initiative launched at COP28 and co-stewarded by the UAE, World Bank and FAO, which serves as one of the primary mechanisms for implementing the UAE Declaration. The Declaration, endorsed by 159 Heads of State, calls for significantly scaled-up technical and financial assistance to align food and agriculture policies with national climate goals, reduce greenhouse gas emissions and enhance resilience, particularly in low- and middle-income countries. The TCC is designed to: (i) provide technical assistance for integrating agriculture and food systems planning into national climate adaptation and mitigation strategies; and (ii) support the development of prioritised investment pipelines based on these integrated plans. The TCC will operate across national, regional, continental and global levels.

[3] A recent update further ranks these in terms of their ability to reduce carbon footprints and preserve biodiversity; to digitalise transport; to improve access to public services, linking also rural road networks, urban mobility, and connectivity in and between cities; and to unlock productive areas and support value chain development in mining, agriculture, agribusiness and industry (Kavalov et al, 2025).

[4] In broad terms: "The AfCFTA will have the greatest effect where it will be reducing high tariffs on intra-African trade, where there exists some intra-African trade to scale up and where there is ample external trade to substitute away from" (Luke, 2025), though this assumes that consumers see imports and African produce as substitutes. Most potential for the AfCFTA to boost intra-African trade is identified in fish and seafood, sugar, fruit, tobacco, preparations of cereals, vegetables, vegetable oils, beverages and dairy, as well as exporters of agricultural machinery and fertilisers.

[5] Such areas have been identified by simultaneously looking for the highest number of investments under the EU, Programme for Infrastructure Development in Africa (PIDA), World Bank, etc.; the highest prevalence of productive areas, e.g. mineral extraction sites, cropland, that were under-connected in terms of under-developed network accessibility; fastest growing population; lowest number of transport networks and network entry points of all types (road, rail, air), where transport accessibility and performance were the lowest and drive times the highest; lowest natural (e.g. floods) and man-related (e.g. conflicts) risks; highest greenhouse gas emissions – carbon dioxide (CO2), methane (CH4), nitrous oxide (N2O) – from all sectors (Kavalov, 2025).

[6] The main takeaways and links to those studies are summarised here.

[7] These draw on Byiers and Vanheukelom (2016).

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