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ALC CORRIDOR PAPER AGRO-LOGISTICS AND CASSAVA INVESTMENTS

Unlocking climate-resilient investment along the Abidjan-Lagos Corridor through Agro-Logistics and Cassava Value Chains

ecdpm

2026

Eco Origins Office Park, Block F, 349 Witch-Hazel Avenue, Highveld,
Centurion, Pretoria 0157, South Africa

Tel: +27 11 256 3600
Email: oceo@auda-nepad.org
Web: www.nepad.org
X: @NEPAD_Agency

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A

ABBREVIATIONS

Unlocking climate resilient investment along the Abidjan-Lagos Corridor through Agro-Logistics and Cassava Value Chain

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Abbreviations: Part 1

Abbreviation	Full term
AfCFTA	African Continental Free Trade Agreement
AfDB	African Development Bank
AFC	African Food Changemakers
AGII	Africa Green Industrialisation Initiative
AIP	Agro-Industrial Park
ALC	Abidjan–Lagos Corridor
ALCO	Abidjan-Lagos Corridor Organisation
ALCOMA	Abidjan-Lagos Corridor Management Authority
ATCMA	Africa Trade Competitiveness and Market Access
AU	African Union
AUDA-NEPAD	African Union Development Agency-New Partnership for Africa's Development
CAADP	Comprehensive Africa Agriculture Development Programme
CAAP	Common African Agricultural Parks
CCR1	Climate Change and Resilience Portal
CILSS	Permanent Inter-State Committee for Drought Control in the Sahel
DFI	Development Finance Institution
DIZ	Dawa Industrial Zone
EAT	(Promoting agricultural trade in West Africa) programme
ECDPM	European Centre for Development Policy Management
ECOWAS	Economic Community of West African States
ENABEL	Belgium's federal development agency
ETLS	ECOWAS Trade Liberalisation Scheme
EU	European Union
FAO	Food and Agriculture Organization (UN)
GDIZ	Glo-Djigbé Industrial Zone
GDP	Gross Domestic Product
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
HQCF	High-quality cassava flour
IIP	(Arise) Integrated Industrial Platforms
IITA	International Institute of Tropical Agriculture
ITC	International Trade Centre
OECD	Organisation for Economic Co-operation and Development

Abbreviations: Part 2

Abbreviation	Full term
PEIA	Plateforme Économique Industrielle d'Abidjan
PGII	Partnership for Global Infrastructure and Investment
PIA	Adétikopé Industrial Platform
PIDA	Programme for Infrastructure Development in Africa
PlatinOr	Platinum Group Services
PPIAF	Public-Private Infrastructure Advisory Facility
PPP	public-private partnership
SEDIN	Sustainable and Inclusive Development for Decent Employment in Nigeria
SEI	Stockholm Environment Institute
SEZ	Special Economic Zone
SWAC	Sahel and West Africa Club
UEMOA	West Africa Economic and Monetary Union
UNCTAD	United Nations Conference on Trade and Development
UNECA	United Nations Economic Commission for Africa
UNDP	United Nations Development Programme
UNIDO	United Nations Industrial Development Organization
WACIP	West African Common Industrial Policy
WACOMP	West African Competitiveness Observatory
WAMZ	West African Monetary Zone
WAQP	West African Quality Programme
WEFE	water-energy-food-ecosystems

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B

SUMMARY

Unlocking climate resilient investment along the Abidjan-Lagos Corridor through Agro-Logistics and Cassava Value Chain

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The Abidjan–Lagos Corridor (ALC) aims to provide regional connections within one of the world's fastest-growing urban markets. Rapid urban growth and rising food demand along the corridor offer opportunities for regional trade, value addition and investment. Yet in practice, it remains a high-friction trade route, characterised by fragmentation, persistent non-tariff barriers and high levels of informality. As a result, its potential as a regional agri-food system remains largely untapped, with limited processing capacity and a high-risk investment environment.

Unlocking the ALC's potential will require going beyond the current focus on transport infrastructure towards making it a climate-resilient trade and logistics system. It also depends on improving data collection and use; strengthening digital trust infrastructure, traceability and financing mechanisms across the ALC's fragmented value chains.

This note identifies two complementary entry points with investment potential:

(i) **agrologistics**, particularly through agro-industrial parks as anchor nodes; and

(ii) the **cassava value chain**, as an example of a scalable driver of industrial processing, import substitution and regional market integration. By linking these areas, the paper highlights how targeted, de-risked investments can help align political and private-sector interests, strengthen regional value chains and turn the ALC into a more integrated and resilient economic corridor.

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INTRODUCTION: THE CORRIDOR AS A SYSTEMIC CHALLENGE

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The ALC, linking Côte d'Ivoire, Ghana, Togo, Benin and Nigeria, has the potential to support one of the world's fastest-growing urban markets and serve as a conduit for combining the food, trade, infrastructure and climate agendas.

In practice, however, the corridor functions less as an integrated economic space than a fragmented series of national markets, dominated by unrecorded, often small-scale, cross-border trade. At the same time, its economic relevance is growing rapidly: West Africa's population is projected to nearly double by 2050, while regional food demand is expanding quickly. This growing recognition is reflected in ECOWAS's 2025-2027 Regional Economic Outlook, which places food security and regional integration at the centre of the region's economic and resilience agenda. Recent Organisation of Economic Co-operation and Development (OECD)/Sahel and West Africa Club(SWAC) work further highlights the rapid spatial expansion of urban agglomerations across coastal West Africa, reinforcing the emergence of the Abidjan–Lagos axis as a major transnational urban and economic corridor. Strengthening regional food trade is a key pathway to strengthening resilience in the face of climate and market shocks.

Unlocking the ALC's potential requires each corridor country government to see its own economic and political interest in investing and trade across borders. This note focuses on two complementary entry points to improving the ALC's performance: agrologistics, particularly through agro-industrial parks, and the cassava value chain as an example of a potentially scalable driver of value addition and regional market integration.

The note addresses three core questions:

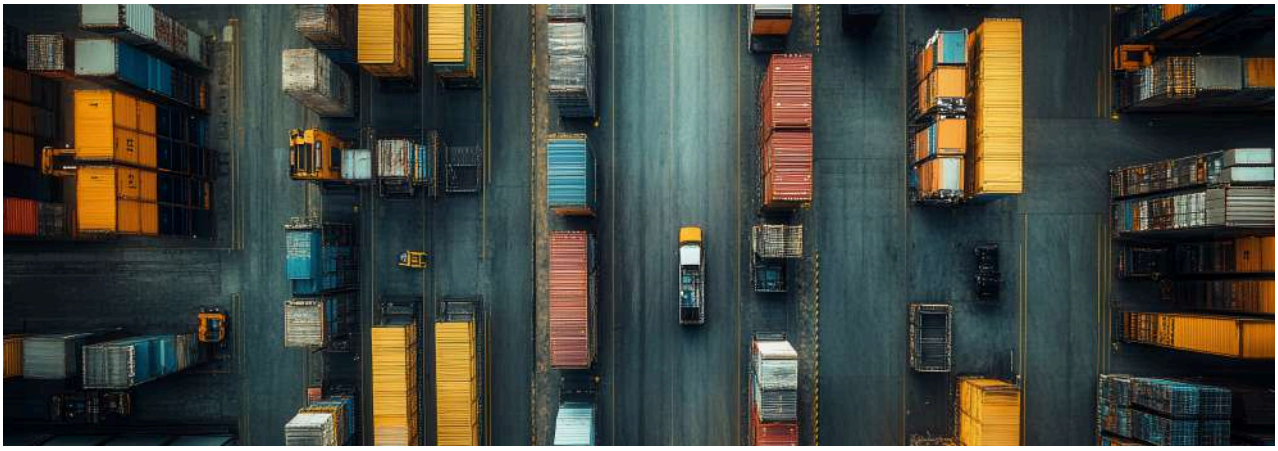
1. What are the main barriers preventing the ALC from functioning as an integrated and resilient agri-food trade system?

2. What investment opportunities in agrologistics and cassava can strengthen regional trade and food systems?

3. How can these opportunities help align political and private-sector interests across corridor countries?

The paper builds on discussions held during a multi-stakeholder consultation convened by the African Union Development Agency-New Partnership for Africa's Development (AUDA-NEPAD) and the European Centre for Development Policy Management (ECDPM) in Accra in April 2026. That brought together private sector actors, financiers, agropark operators, regional and international organisations and technical experts to identify practical investment pathways and implementation priorities.

Ultimately, this paper identifies priority areas for de-risked investment and highlights how targeted interventions can help generate a virtuous cycle of market integration and resilience along the corridor.



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01

PRIORITIES AND BARRIERS FOR TRADE ALONG THE ALC

Unlocking climate resilient investment along the Abidjan-Lagos Corridor through Agro-Logistics and Cassava Value Chain

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The ALC differs from many African corridors in that, rather than connecting hinterlands to a single port, it links major coastal cities and competing ports, mostly operating as a fragmented chain of national markets in which each country operates its own port, competing for hinterland-bound cargo primarily serving different north–south trade routes instead of a coastal axis.

The ALC is a long-standing regional infrastructure project, with infrastructure investments now starting to take off (See Box 1). The corridor is characterised by persistent cross-border barriers that raise trade costs and reduce trade-time predictability. Non-tariff barriers, such as border delays, informal fees and weak enforcement of regional agreements, continue to encourage informality, which is estimated to account for up to 85% of food flows in the region. At the same time, fragmented value chains, weak aggregation systems and agrologistics gaps – particularly in storage, cold chains and rural connectivity – increase logistics costs, contribute to post-harvest losses and limit the ability to scale regional processing and trade.

More broadly, persistent infrastructure inefficiencies across transport, energy and logistics systems continue to weaken regional trade competitiveness and integration efforts in West Africa. At the same time, weak coordination and inconsistent implementation of regional frameworks reinforce market fragmentation and uncertainty. As a result, trade remains fragmented and largely localised, with limited long-distance corridor-wide flows despite growing demand. (see Box 2).

Box 1: A snapshot of the Abidjan-Lagos Corridor (ALC) project

The Abidjan–Lagos Corridor (ALC) is a 1 000+ km coastal transport corridor linking Côte d'Ivoire, Ghana, Togo, Benin and Nigeria. It is a flagship Economic Community of West African States (ECOWAS) project under the Programme for Infrastructure Development in Africa (PIDA), connecting countries that account for over 70% of ECOWAS GDP and a large share of regional trade.

Planned investments (estimated at $15.6-billion, with works expected to begin in 2026) aim to upgrade the corridor into a major logistics backbone, reducing transport costs and improving connectivity between key urban and port hubs. Despite this ambition, the corridor currently functions as a **high-friction trade route**, with fragmented logistics systems and persistent non-tariff barriers.

Beyond infrastructure, the ALC is increasingly seen as a test case for regional integration under the African Continental Free Trade Agreement (AfCFTA), with the AfCFTA Secretariat given a mandate to work with countries on trade facilitation measures along the corridor, offering the potential to strengthen intra-regional trade, agri-food systems and economic resilience.

Figure 1

The ALC project (Source: ECOWAS Commission)

If effectively implemented, the ALC could become the backbone of West Africa's food economy. The corridor's strategic importance is reinforced by rapid urban growth. ECOWAS's urban population is projected to more than double from 203-million in 2020 to 436-million by 2050, with a large share concentrated along the coastal axis, forming one large, continuous urban agglomeration. This is driving demand, particularly around major cities from Abidjan to Lagos, for more diverse, perishable and processed food products, increasing the importance of efficient regional trade and logistics systems.

Policy incoherence as a barrier to climate-resilient trade

A range of policy incoherence to constrain the development of a functional and climate-resilient coridor.

Policy and institutional fragmentation:

Regional commitments are not matched by consistent national implementation or enforcement, while overlapping regional bodies and corridor governance structures raise coordination costs. National agricultural, industrial and food security policies remain misaligned with regional trade objectives

Tension between national protection and regional integration:

Food sovereignty agendas and crisis-driven trade restrictions may offer short-term national protection but undermine regional resilience, amplifying price volatility and supply insecurity across neighbouring markets

Missing market and financing logic:

Corridor investments are identified but often lack clear demand, financing structures and links to viable value chains. This is compounded by fragmented, unreliable data on production, quality, trade flows and standards compliance that increases uncertainty and limits financing

Inbalanced investment priorities:

Spending on hard infrastructure (roads, ports) outpaces progress on trade facilitation, standards and border procedures, while limited coordination across production, processing and logistics creates sequencing problems and inefficiencies

Weak integration of climate and just transition:

Climate risks and just transition principles are not systematically embedded in corridor planning and investment decisions.

Box 2: Policy incoherence as a barrier to climate-resilient trade

A range of policy incoherences continues to constrain the development of a functional and climate-resilient corridor:

Implementation gaps: regional commitments are not matched by consistent national implementation or enforcement (e.g. weak enforcement of the ECOWAS Trade Liberalisation Scheme (ETLS)

Weak visibility and data systems: fragmented and unreliable data on production, quality, trade flows and standards compliance increase uncertainty and limit financing opportunities

Fragmented policy frameworks: misalignment between regional trade objectives and national agricultural, industrial and food security policies

Crisis-driven trade restrictions: while trade restrictions may provide short-term national protection, they can undermine regional resilience by amplifying price volatility and supply insecurity across neighbouring markets

Missing market and financing logic: corridor investments are identified, but often lack clear demand, financing structures and links to viable value chains

Overemphasis on hard infrastructure: investments in roads and ports outpace progress on trade facilitation, standards and border procedures

Weak integration of climate and just transition considerations: climate risks and just transition principles are not systematically embedded in corridor planning and investment decisions

Disconnect between production, processing and logistics: limited coordination across value chains leads to sequencing problems and inefficiencies

Tension between national priorities and regional integration: food sovereignty agendas and export restrictions undermine cross-border trade

Institutional fragmentation: Overlapping regional bodies (e.g. ECOWAS, the West Africa Economic and Monetary Union – UEMOA, the West African Monetary Zone – WAMZ) and corridor governance structures (e.g. the Abidjan-Lagos Corridor Management Authority (ALCOMA) and the Abidjan-Lagos/-Corridor Organisation (ALCO), raising the coordination cost of corridor governance.

Regional frameworks such as the West African Common Industrial Policy (WACIP), the Africa Green Industrialisation Initiative (AGII), West African Competitiveness Observatory (WACOMP), and the West African Quality Programme (WAQP) aim to support industrialisation and agro-processing, but do not directly address the core constraints of the ALC, namely trade facilitation, logistics integration and cross-border coordination. More fundamentally, the challenge is often less the absence of regional frameworks than weak implementation, coordination and alignment with commercial realities along the corridor.

At the same time, climate risks are increasingly affecting agricultural productivity and food security in a region where agriculture still employs roughly one-third of the workforce, contributes 18–24% of GDP and remains central to livelihoods and export earnings. Therefore, strengthening regional trade represents an adaptation strategy, allowing supply to adjust across borders in response to climate shocks. Evidence suggests that access to markets through trade may strengthen adaptive capacity more effectively than narrow food self-sufficiency approaches, particularly where climate impacts also affect domestic production.

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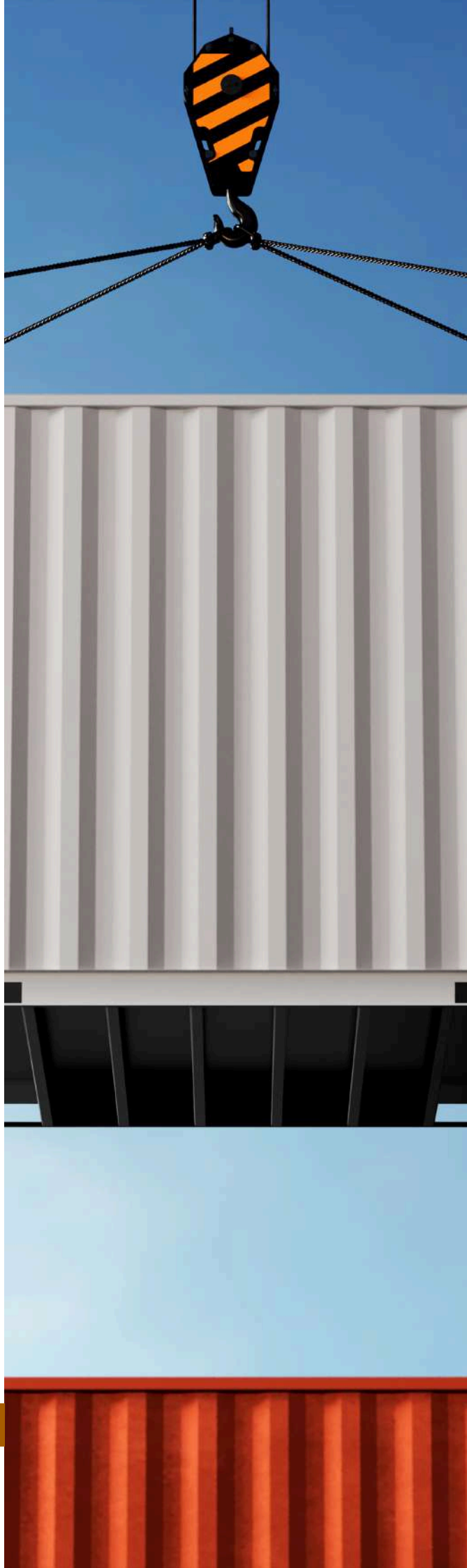
WHERE THE OPPORTUNITIES LIE: AGROLOGISTICS AND CASSAVA

Unlocking climate resilient investment along the Abidjan-Lagos Corridor through Agro-Logistics and Cassava Value Chain



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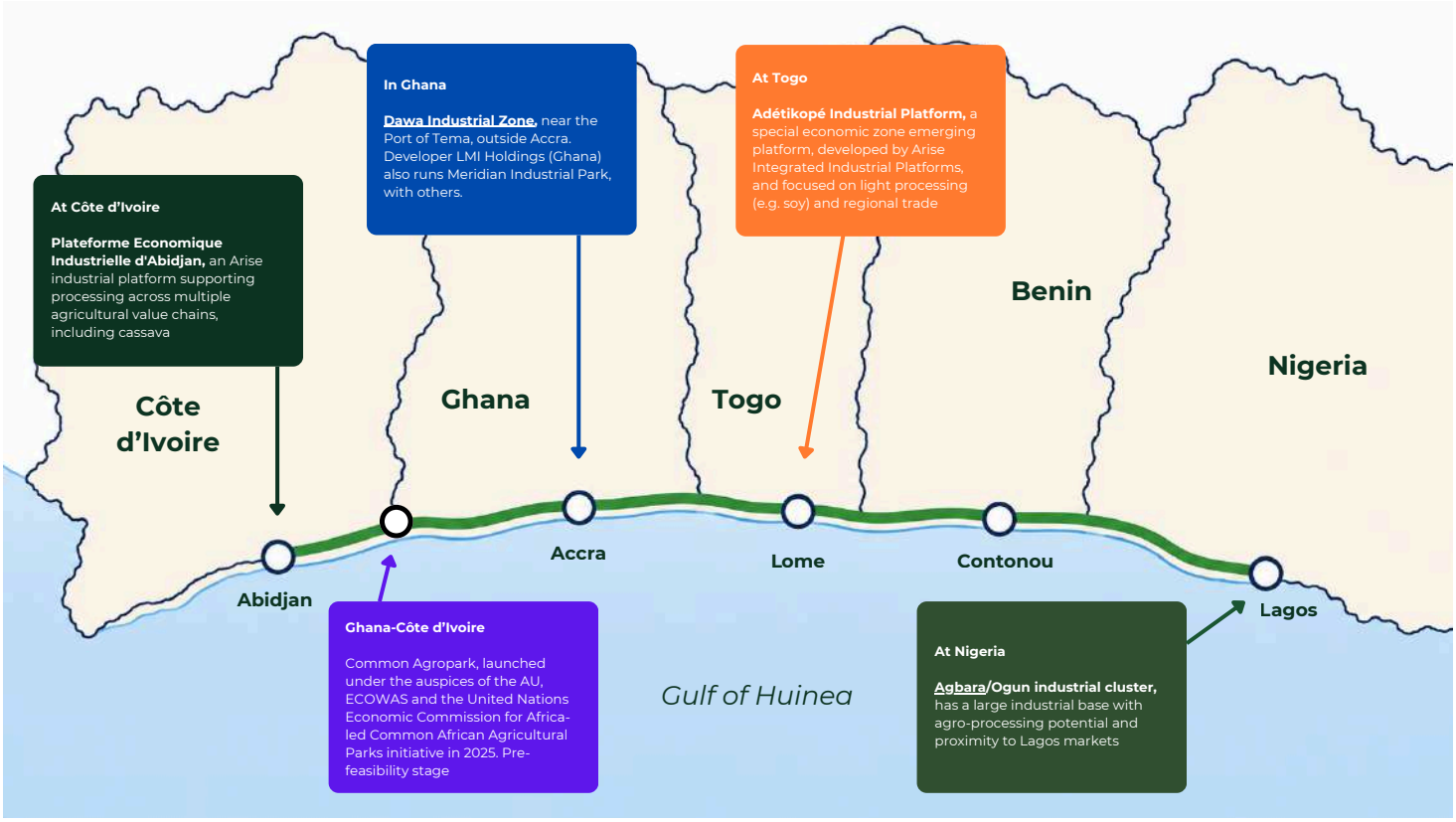
Building on the ALC's high-friction dynamics, this section discusses investment opportunities in agrologistics and cassava that might translate growing regional demand into climate-resilient economic activity. Strengthening logistics, processing and cross-border linkages offers a practical pathway to unlocking private investment beyond transport infrastructure.

2.1. Agro-industrial parks as investment anchors

Agro-industrial parks are emerging across all ALC countries in a bid to attract investment and scale processing (see Box 3). If effectively linked to initiatives to invest in and improve trade facilitation and corridor logistics, they can aggregate inputs from across borders and serve growing urban markets along the corridor, while linking to national industrial policy ambitions. Rather than functioning as isolated industrial estates, for agroparks to be successful they need to be able to operate as integrated systems linking aggregation, logistics, processing, energy, financing and surrounding trading networks.

Agro-industrial parks along the ALC



Box 3: Agro-industrial parks along the ALC (selected examples)

Agro-industrial parks (AIPs) differ from special economic zones (SEZs) in that they focus specifically on agricultural processing, storage and value addition. However, AIPs may operate within broader SEZ frameworks or as stand-alone zones with similar incentives. SEZs are legally designated areas offering fiscal incentives, streamlined regulations and infrastructure to attract investment across sectors (manufacturing, logistics, services, sometimes agro-processing).

Several agro-industrial park initiatives are emerging along the ALC, aiming to support processing, value addition and investment attraction:

- **Dawa Industrial Zone (DIZ**, Ghana), near the Port of Tema. This has been developed by a Ghanaian company, LMI Holdings, which also runs an industrial park at Tema port – Meridian Industrial Park – with companies, including Cargill and Barry Callebaut
- **Ghana-Côte d'Ivoire** Common Agropark (launched under the auspices of the AU, ECOWAS and the United Nations Economic Commission for Africa-led Common African Agricultural Parks (CAAP) initiative in 2025) is still at the pre-feasibility stage and is intended to focus on cocoa and rice
- **Glo-Djigbé Industrial Zone** (GDIZ, Benin) was developed by Arise Integrated Industrial Platforms (IIP) and is positioned as a regional processing and export hub, with growing agro-processing investments
- Adétikopé Industrial Platform (PIA, Togo) is a SEZ, developed by Arise Integrated Industrial Platforms and focused on light processing (e.g. soy) and regional trade. They seek investments to take advantage of Togolese production of cassava, maize, cotton, palm oil, rice, peanuts and coffee
- **Plateforme Economique Industrielle d'Abidjan** (PEIA, Côte d'Ivoire) is also an Arise industrial platform supporting processing across multiple agricultural value chains, including cassava
- **Agbara/Ogun industrial cluster (Nigeria)** has a large industrial base with agro-processing potential and proximity to Lagos markets

While these parks reflect growing investment in this approach, investment levels and performance remain uneven. Moreover, much of West Africa's food trade still operates through informal cross-border nodes, suggesting that corridor development must also strengthen existing trading systems alongside formal agro-industrial zones

The growing focus on agro-industrial parks and agro-processing offers an opportunity to better align infrastructure, trade facilitation and investment strategies. Access to cross-border markets can help improve the commercial viability and attractiveness of these investments. Recent work by ECOWAS and the International Trade Centre highlights the importance of targeting specific cross-border investment nodes and linking them to corridor-wide logistics improvements.

Emerging private-sector demand remains limited, but often precisely because of the barriers that remain for cross-border trade in terms of access to inputs and to larger markets. Firms operating along the corridor highlight the need for faster, more predictable border procedures, improved cold-chain infrastructure and greater harmonisation of standards to scale operations.

2.2 Cassava as a strategic value chain, with a missing middle

Cassava offers one potential strategic entry point to complement corridor development, combining its dual role as a staple crop with growing industrial demand (e.g. starch, high-quality cassava flour – HQCF, emerging bio-based materials and ethanol). [1] While West Africa dominates global production, the sector remains largely localised, with limited integration into regional and industrial markets (see Annex, Box 6). [2] Yet, the sector holds strong potential for import substitution, particularly for starch, ethanol and flour. Realising this requires competitive pricing, reliable supply of fresh roots and stronger coordination across the value chain to meet industrial standards: there is, for example, untapped potential in replacing expensive imports of industrial starch, ethanol, and wheat/maize flours with locally processed cassava derivatives.

While export opportunities remain limited, cassava products are already exported to Western Europe and North America in processed forms such as starch, flour, frozen roots and garri (a popular West African dish), particularly for diaspora and ethnic food markets. According to the ITC, approximately two-thirds of the cassava export potential in the region remains unrealised due to gaps in understanding market opportunities, while demand, especially in Europe, is expected to continue growing. Emerging niche opportunities include gluten-free cassava products for European consumer markets. Better assessing West Africa's export potential would allow policymakers to better understand global market opportunities and identify growth areas beyond regional markets.

Cassava's perishability and bulkiness are constraints. The crop requires processing within 24–48 hours, making proximity to processing and efficient logistics essential. But investments in the cassava sector, whether in mobile processing or SEZs and AIPs, which provide essential infrastructure, such as roads, power and water, are critical to the viability of medium- to large-scale cassava processing and value addition. Scaling cross-border markets therefore depends on targeted investments in aggregation, processing and trade facilitation in each country along the ALC. Beyond physical infrastructure, stakeholders repeatedly highlighted the importance of digital systems for improving coordination, traceability and investment visibility across fragmented cassava value chains (see Box 4).

Digital systems as enablers of investable cassava value chains

Many of the constraints affecting cassava value chains and agro-logistics are not only linked to production or transport, but also to fragmented information, week coordination, inconsistent quality control and limited traceability. Digitalisation can address these gaps in four ways:

Help processors, agro-parks and finance assess wether reliable throughput is realistic by mapping production zones, sourcing areas, expected volumes, aggregation points and logistics bottlenecks, using geospatial mapping and geographic information system-based sourcing analysis (e.g.: Food and Agriculture Organization's Hand-in-Hand Geospatial Platform)

Strengthen traceability and quality management by recording origin, handling, quality parameters and compliance information (e.g.: Batch-level traceability, digital quality records and compliance documentation.)

Improve coordination by linking harvest timing, aggregation, trnsport availability, processing capacity and market demand. (e.g.: Sahred planning dashboards, digital scheduling systems or logistics coordination platforms.) For cassava's short post-harvest window, this coordination function is central to commercial viability

Improve investment readiness by using operational reporting and performance dashboards to turn data into evidence on volumes, delivery reliability, reduced losses, capacity use and recurring bottleneck. This can help banks, development finance institutions (DFIs) and public partners assess risk more clearly

By improving visibility, coordination, traceability and performace monitoring, digital systems can help make cassava and agro-logistics opportunities along the corridor more investable.

Box 4: Digital systems as enablers of investable cassava value chains

Many of the constraints affecting cassava value chains and agrologistics are not only linked to production or transport, but also to fragmented information, weak coordination, inconsistent quality control and limited traceability. Digitalisation can address these gaps in four ways:

1. Digital tools can improve visibility by mapping production zones, sourcing areas, expected volumes, aggregation points and logistics bottlenecks, using geospatial mapping and geographic information system-based sourcing analysis, with institutional examples such as the Food and Agriculture Organization's Hand-in-Hand Geospatial Platform. This helps processors, agroparks and finance actors assess whether reliable throughput is realistic

2. Digital tools can improve coordination by linking harvest timing, aggregation, transport availability, processing capacity and market demand. These include tools such as shared planning dashboards, digital scheduling systems or logistics coordination platforms. For cassava, where fresh roots deteriorate quickly after harvest, this coordination function is central to commercial viability because it helps producers, aggregators, logistics providers, processors and buyers operate within the same short post-harvest window

3. They can strengthen traceability and quality management by recording origin, handling, quality parameters and compliance information, using recognised approaches such as batch-level traceability, digital quality records and compliance documentation. This is important for buyers, processors, regulators and cross-border trade

4. They can improve investment readiness by using operational reporting and performance dashboards to turn data into evidence on volumes, delivery reliability, reduced losses, capacity use and recurring bottlenecks. This can help banks, development finance institutions (DFIs) and public partners assess risk more clearly

By improving visibility, coordination, traceability and performance monitoring, digital systems can help make cassava and agrologistics opportunities along the corridor more investable.

Source: Author contribution by Madieye Ndour (2026), ECDPM associate and digital consultant.

Several agro-processing firms operating along the corridor already illustrate the potential for scaling more integrated cassava value chains. Companies such as Niji Group and Cato Foods in Nigeria are active in cassava processing, farmer aggregation and the development of value-added products linked to growing industrial and consumer demand. In Benin, Platinum Group Services (PlatinOr) combines local sourcing, agro-food processing and value addition through agroecological production systems and partnerships with cooperatives and small-scale producers. These examples highlight increasing private-sector interest in cassava industrialisation, but also the continued need for investments in aggregation, logistics, energy and financing to scale operations sustainably.

The experiences of firms operating along the corridor are consistent with findings from a regional stakeholder consultation convened in February 2026, which identified six priorities for unlocking cassava-based industrialisation and trade (see Box 5).

Box 5: Key insights from the Cassava Consultation (February 2026)

A virtual consultation convened by ECDPM, African Food Changemakers (AFC) and AUDA-NEPAD in February 2026 brought together stakeholders from Ghana, Nigeria, Cote d'Ivoire, Benin and Togo. Participants highlighted the persistent constraints and untapped potential facing the cassava value chains along the ALC:

1 Cassava is underutilised as a strategic crop

- Performs relatively well under drought and low-input conditions
- $10-billion in annual intr-regional food trade (estimate)
- West Africa continues to import significant volumes of processed cassava substitutes
- Productivity gains are essential to avoid agricultural expansion that drives deforestation and habitat loss

2 The problem is not policy absence, but implementation

- Numerous ECOWAS and national trade instruments already exist. However, implementation gaps persist
- Informal trade often becomes a mechanism tp bypass delays, informatiomal payments and administrative hurdles at border crossings

3 Infrastructure and logistics remain binding constraints

- High transport costs
- Limited cold storage facilities
- Poor access roads
- Energy inefficiencies

These undermine competitiveness, especially for Cassava, which perishes quickly

4 Scaling requires aligned public and private incentives

- Align regional and national policies with private sector realities
- Production capacity exists, but production costs are high
- Limited access to finance
- Cross-border inout flows are constrained

5 Competition and cooperation must be balanced

- While countries compete for investment, regional coordination is essential to develop complementary value chain and avoid fragmentation.
- Targeted support for specific value-added products may provide clearer entry points for investment

6 Reliable suply requires integrated value chain investment

To stabilise yields:
- Improved varieties
- Good Agricultural Practice
- Irrigation

Critical to reducing losses, lowering costs, and improving sustainability:
- Feeder roads
- Storage
- Energy-efficient rpocessing, including waste valorisation

These insights reinforce the need to approach cassava as a food-security issue and a regional industrial opportunity requiting coordinated trade facilitation, infrustructure investment and financing solutions.

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INVESTMENT OPPORTUNITIES AND ENABLING SYSTEMS ALONG THE ALC

Unlocking climate resilient investment along the Abidjan-Lagos Corridor through Agro-Logistics and Cassava Value Chain

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Despite growing political interest, businesses often avoid cross-border operations along the ALC due to high risks, fragmented markets and unpredictable border conditions, instead operating within national markets or relying on informal arrangements. As a result, the corridor remains underutilised as a regional trade and investment platform. While at the continental level, the AfCFTA may further reduce trade barriers, facilitate the free movement of people and labour, and support greater regional investment integration, discussions around the ALC continue to focus more on barriers than opportunities. Concerns about competition and entrenched informal trade systems create resistance to deeper integration, despite formal commitments under the ECOWAS trade liberation scheme.

This underscores the need to identify coalitions of firms and public actors across corridor countries that share a clear commercial interest in advancing regional trade and investment. Unlocking private-sector demand will require targeted, de-risked investment pathways capable of reducing uncertainty, improving coordination and strengthening investor confidence across fragmented value chains. In this regard, four cross-cutting priority investment areas emerge:

First, climate-smart agrologistics investments are needed to strengthen cold chains, aggregation systems, storage and cross-border transport systems in order to reduce losses, improve reliability and connect production zones to growing urban markets.

Second, decentralised and modular processing systems, particularly for cassava,can help address the "missing middle" between production and industrial demand. Investments in mobile and modular processing units, aggregation centres and corridor-linked processing hubs located near production zones can reduce post-harvest losses, improve supply reliability and strengthen regional value addition.

Third, more integrated financing and resilience solutions are needed to address persistent midstream financing gaps. The financing challenge along the ALC is not necessarily a lack of capital, but rather a mismatch between financial products and agricultural cycles. Blended finance, leasing, guarantees and climate-finance instruments could help de-risk investments in aggregation, processing, cold chains and renewable-energy solutions, including waste valorisation systems.

Fourth, trusted digital and earth observation systems are becoming increasingly important corridor investments, including platforms, such as the International Institute of Tropical Agriculture's Cassava Business Connector, that improve market visibility and coordination. Digital traceability tools, market information systems, logistics coordination platforms and satellite-enabled services can improve climate-risk monitoring, yield forecasting and trade transparency, helping make fragmented value chains more visible, predictable and investable.

The following sections illustrate how these cross-cutting investment priorities translate into concrete business and investment opportunities along the corridor. They focus in particular on cassava as a strategic value chain and on agro-industrial parks and agrologistics systems as potential anchor nodes for more integrated and resilient regional trade.

3.1. Cassava investment opportunities by country

Cassava illustrates many of the broader investment priorities identified along the corridor, particularly the need for decentralised processing, stronger aggregation systems, climate-smart logistics and better-aligned financing mechanisms capable of linking production to growing industrial and urban demand.

The ITC and partners have done extensive research on the cassava sector and its potential investment opportunities in the ECOWAS region, mainly through the West Africa Competitiveness (WACOMP)programme (see Box 4 in Annexes). According to WACOMP, cassava processing investments should prioritise proximity to raw materials, as fresh roots account for 25–45% of variable costs and transport adds another 5–10%. Given their high moisture content (60–70%) and associated waste, long-distance transport between farm and factory significantly reduces efficiency and should be avoided where possible. The ITC also identified a range of cassava investment opportunities across ALC countries, particularly in processing, aggregation and mechanisation (see Table 1). A consistent finding is that proximity to production is critical, reinforcing the case for decentralised, corridor-linked processing models. These opportunities vary across corridor countries depending on production structures, industrial demand and existing processing capacity.

Table 1 - Main cassava investment opportunities per country (International Trade Centre 2022)

Country	Priority cassava investments
Côte d'Ivoire	Village processing, starch substitution, regional trade
Ghana	Industrial processing (HQCF, starch, ethanol), mechanisation
Togo	Processing (starch, *garri*), production expansion
Benin	Processing (ethanol, packaged products), quality upgrading
Nigeria	Starch, HQCF, ethanol, mechanised production

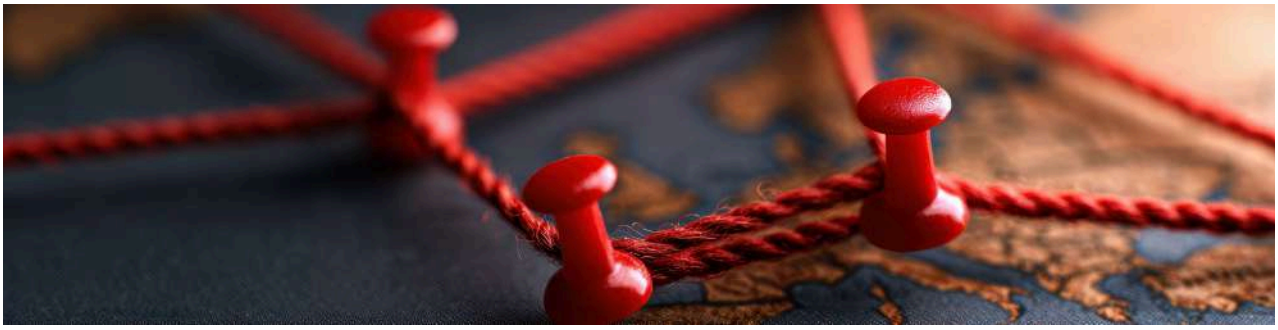
3.2 Business opportunities in agrologistics and selected agroparks

Agro-industrial parks and agrologistics systems provide a second illustration of how integrated infrastructure, logistics, financing and coordination mechanisms can help reduce fragmentation and support more investable regional value chains.

Agroparks can act as anchor nodes for corridor investment, linking cassava production zones to urban markets. Given the crop's perishability, the most viable investments are decentralised processing hubs located close to production but connected to the corridor's main transport spine. Priority nodes include:

- Ogun/Lagos (Nigeria) – anchored by industrial demand and large cassava supply
- Tema/Dawa (Ghana)– with strong port access and agro-industrial infrastructure
- Glo-Djigbé Industrial Zone (Benin) – an emerging regional processing and logistics platform

Demand is driven primarily by regional urban markets, particularly for starch, HQCF, ethanol and animal feed, which remain import-dependent. Comparative advantages suggest a complementary division of labour across countries, while the most scalable pathway lies in strengthening linkages between agroparks, processors and these markets: Nigeria and Ghana are best positioned to scale industrial processing (starch, HQCF, ethanol), while Benin and Côte d'Ivoire can serve as processing and re-export hubs, leveraging industrial zones and port infrastructure. Togo's Adétikopé platform (PIA) offers potential as a regional aggregation and light-processing node.



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ACTIONABLE PATHWAYS TOWARDS A RESILIENT CORRIDOR

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The following pathways outline non-exhaustive priorities to guide discussion on how to strengthen the ALC as a climate-resilient agri-food system. They focus on key areas where policy alignment, investment and coordination can unlock private sector engagement and regional trade. Additional actions and country-specific approaches will be needed, but these provide a starting point for identifying practical and scalable interventions.

Actionable pathways towards a resilient corridor

Priorities for strengthening the Abidjan-lagos Corridor
as a climate-resillient agri-food system.

1 Policy coherence and regulatory environment

- Prioritise regional food markets
- Improve market transparency and data access
- Accelerate harmonisation and implementation of standards
- Integrate climate risks into regional trade planning

2 Financing, de-risking and investment

- Invest in argologistics and corridor connectivity
- Scale processing and vlaue addition
- leverage Climate and infrustructure finanace
- Mobilise blended finance and risk-sharing instruments
- Invest in climate-smart systems and data
- Develop integrated water-energy food ecosystems- oriented investment platforms

3 Governance, multi-stakeholder coordination and pertnership

- Promote regional trade facilitation platforms
- Scale and replicate proven approaches while strengthening strategic alliances acroos value chains , including farmers, aggregators, processors and research and development actors
- Better align development partner support with corridor needs

Climate-resilient food systems | **Increased trade, jobs and investment** | **Better nutrition and livelihoods** | **Stronger region, shared prosperity**

4.1. Policy coherence and regulatory environment

Prioritise regional food markets: rebalance agricultural and trade policies to better support intra-regional food systems (as aforementioned, West African agricultural and food policies remain disproportionately focused on global import and export markets), recognising their growing economic importance and role in resilience

Improve market transparency and data access: expand digital platforms and regional systems that provide real-time information on prices, volumes and trade opportunities to reduce uncertainty and support investment decisions, while strengthening market intelligence on global export opportunities for higher-value cassava and agro-processed products

Accelerate harmonisation and implementation of standards: strengthen enforcement of existing regional frameworks (e.g. ECOWAS Trade Liberalisation Scheme, sanitary and phytosanitary standards) to reduce non-tariff barriers and facilitate predictable cross-border trade

Integrate climate risks into regional trade planning: strengthen transboundary approaches (e.g. shared ecosystems, adaptation strategies) and protect critical corridor infrastructure (including coastal ports) from climate shocks

4.2 Financing, de-risking and investment

Invest in agrologistics and corridor connectivity: develop aggregation hubs, cold chains and more efficient cross-border transport systems (e.g. green lanes) to reduce losses and improve reliability for perishable goods

Scale processing and value addition: support investments in storage and processing capacity to capture import substitution opportunities and anchor demand in regional markets, including climate-smart intensification for cassava. Given cassava's role as a climate-resilient crop, corridor investments may also offer opportunities to mobilise climate-adaptation and resilience finance

Leverage climate and infrastructure finance: expand the use of instruments such as green bonds, infrastructure funds and sovereign wealth vehicles to finance resilient infrastructure to mobilise long-term capital and reduce reliance on external borrowing

Mobilise blended finance and risk-sharing instruments: use guarantees, concessional capital and public-private partnership (PPPs) frameworks to crowd in private investment, especially for medium-scale processors facing high infrastructure and energy costs

Invest in climate-smart systems and data: promote earth observation tools (i.e. satellite-enabled monitoring) and digital traceability systems to strengthen resilience, logistics planning and investment decision-making across the corridor (cf. the work of the Permanent Inter-State Committee for Drought Control in the Sahel, along with its regional centre Aghrymet, specialised in providing climate forecasts, surveys and training)

Develop integrated water-energy food ecosystems-oriented investment platforms: bundle agro-processing, renewable energy, water management, cold chains and logistics infrastructure into bankable investment packages capable of generating multiple resilience and development co-benefits (cf. the Africa Development Bank's water-energy food ecosystems Nexus Investment Framework, 2026)

4.3 Governance, multi-stakeholder coordination and partnerships

Promote regional trade facilitation platforms: address border bottlenecks and improve transparency through practical solutions (e.g. digital documentation, simplified clearance), building on the convening role of ECOWAS and joint work with TradeMark Africa

Scale and replicate proven approaches: build on existing tools, training programmes and business models (cf. Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) Sustainable and Inclusive Development for Decent Employment in Nigeria (SEDIN) project), while strengthening strategic alliances across value chains (including farmers, aggregators, processors and research and development actors) to support investment and innovation

Better align development partner support with corridor needs: ensure initiatives such as the European Union's (EU's) Global Gateway, which identifies the Abidjan–Lagos Corridor as a priority corridor for transport and digital investments, integrat e agrologistics and food systems, while reducing fragmentation through joint programming and clearer roles

Ultimately, unlocking the ALC will depend on building coalitions capable of financing, coordinating and scaling investment across borders. Potential investors are likely to include a combination of regional agro-processors, logistics firms, industrial park developers, commercial banks, development finance institutions and development partners already active along the corridor. The challenge is therefore not only to mobilise capital, but also to better align infrastructure, trade facilitation, financing and industrial development strategies around viable regional value chains. Existing initiatives linked to the ALC, including Team Europe partnerships involving actors such as ENABEL (Belgium's federal development agency), Expertise France and TradeMark Africa, could help support more integrated approaches to climate-resilient agrologistics and regional food systems.

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CONCLUSION

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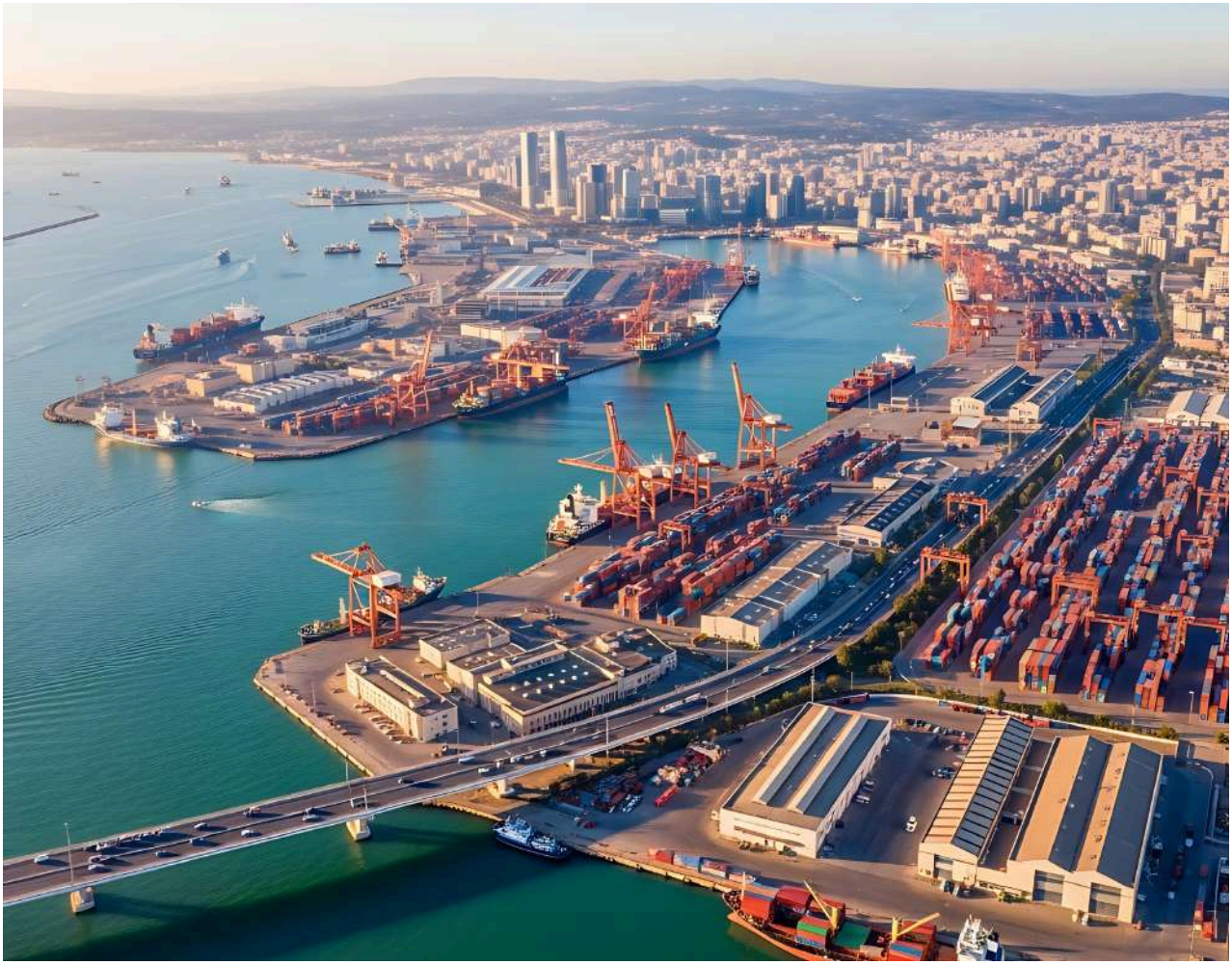
The challenge facing the ALC is no longer only about identifying barriers, but about building trusted and investable regional value chains. This requires moving beyond a narrow focus on transport infrastructure towards integrated systems linking production, aggregation, processing, logistics, financing and digital governance. In a context of growing climate, market and geopolitical uncertainties, strengthening the corridor also means improving the region's capacity to manage transboundary and cascading risks across interconnected food and trade systems.

Unlocking the ALC as a climate-resilient economic system requires strengthening agrologistics and food processing as the backbone of regional trade. Targeted investments in storage, transport, aggregation and agro-industrial parks are essential to connect production zones with rapidly expanding urban markets. Within this agenda, cassava provides a practical and scalable entry point, illustrating how improved logistics and processing can drive value addition, import substitution and resilience.

Two priorities stand out. First, a more predictable trade environment, through trade facilitation, harmonised standards, trusted digital systems and stronger implementation of existing regional frameworks, is critical to reduce risks and attract private investment. Second, investments must be anchored in real market demand, particularly from urban and industrial users, while addressing persistent midstream financing gaps that constrain aggregation, processing and logistics.
Aligning the ALC with frameworks such as the Comprehensive Africa Agriculture Development Programme's 10-year strategy and action plan (CAADP/Malabo 2.0), Nationally-Determined Contributions/National Adaptation Plans under the Paris Agreement on climate change, the Programme for Infrastructure Development in Africa and AfCFTA, alongside initiatives like the EU's Global Gateway and the Partnership for Global Infrastructure and Investment (PGII) programmes, can help mobilise investment. The next phase will need to focus on financing and de-risking mechanisms, capable of crowding in private capital and scaling resilient investment pathways along the corridor.



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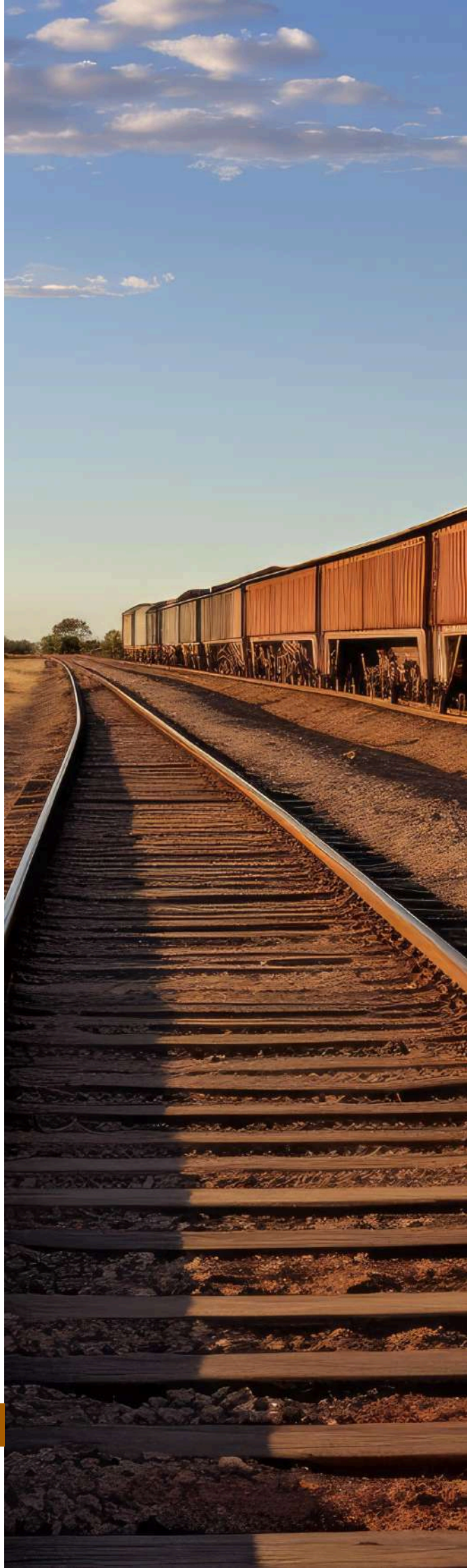
Unlocking climate resilient investment along the Abidjan-Lagos Corridor through Agro-Logistics and Cassava Value Chain



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ANNEXES & FOOTNOTES

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Box 6: Selected regional initiatives relevant to the ALC

- The Regional Strategic Framework for Private Sector Development seeks to position the private sector as a driver of economic growth in West Africa (World Bank)
- Abidjan-Lagos Highway Corridor Financing (2019) – EU & AfDB
- Promoting agricultural trade in West Africa (2022-2027; EAT programme) – GIZ & ECOWAS
- Institutional support project for effective implementation of AfCFTA (2025 –) – UNDP, AfDB & ECOWAS
- West Africa trade facilitation programme (2024–2026) – Trademark Africa & AfDB
- West African Common Industrial Policy (WACIP)
- ECOWAS West Africa Competitiveness Programme (WACOMP) – ECOWAS, EU, ITC
- ECOWAS Africa Trade Competitiveness and Market Access (ATCMA)
- AfDB's Spatial Development Initiative with a key mechanism is the use of anchor investments and special economic zones (such as Benin's GDIZ) to attract private capital and stimulate industrialisation.

FOOTNOTES

[1] Global cassava production exceeded 302-million tons in 2020, with over half produced in Africa (52% in West Africa) and Nigeria alone accounting for 23.4% of global output

[2] Cassava production and trade in the ECOWAS region is dominated by small-scale actors. The ECOWAS region accounts for less than 1% of global cassava exports and imports, as producers cannot compete in the global market. However, cassava export prices could be highly competitive: US cassava flour is traded between $1 030 and $1 260 per ton (2017–2022), while imported starch costs $818–$940 per ton globally; by contrast, with fresh cassava in ECOWAS priced at $14–$35 per ton, native starch could be produced locally at an estimated $264–$450 per ton (based on a 5:1 root-to-starch ratio, plus water and energy costs)

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Unlocking climate-resilient investment along the Abidjan-Lagos Corridor requires stronger links between production, logistics, processing and regional trade.

Agro-logistics and cassava offer practical entry points for shared prosperity, resillience and value addition across West Africa.



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