WEST AFRICAN PAPERS

THE WEST AFRICAN FOOD TRADE ENVIRONMENT: PRIVATE SECTOR PERCEPTIONS OF BARRIERS, OPPORTUNITIES AND THE FUTURE

JULY 2026, NO.52

OECD
BETTER POLICIES FOR BETTER LIVES

SAHEL AND WEST AFRICA Club 50
Secretariat 1976-2026

WEST AFRICAN PAPERS

THE WEST AFRICAN FOOD TRADE ENVIRONMENT: PRIVATE SECTOR PERCEPTIONS OF BARRIERS, OPPORTUNITIES AND THE FUTURE

JULY 2026, NO.52

KOFFI ZOUGBÉDÉ (OECD/SWAC)
ALBAN MAS APARISI (OECD/SWAC)
REBECCA GRAMISCELLI-HASPARYK (OECD/SWAC)
JILL BOUSCARAT (OECD/SWAC)
PHILIPP HEINRIGS (OECD/SWAC)

OECD
BETTER POLICIES FOR BETTER LIVES
SAHEL AND WEST AFRICA Club 50
Secretariat 1976–2026

WEST AFRICAN PAPERS

The West African Papers series explores African socio-economic, political and security transformations, their interactions and their effects. Intended for an audience of experts, researchers and decision makers, they aim to stimulate discussion and inform policy. The papers are available in English and/or French and can be downloaded from:

https://doi.org/10.1787/24142026.

Please cite this work as:
Zougbédé, K. et al. (2026), "The West African food trade environment: Private sector perceptions of barriers, opportunities and the future", Sahel and West Africa Club (OECD/SWAC), *West African Papers*, No. 52, OECD Publishing Paris.

Author contact:
Koffi Zougbédé, email: koffi.zougbede@oecd.org
Alban Mas Aparisi, email: alban.masaparisi@oecd.org

Authorised for publication by Nana Touré, Director, Sahel and West Africa Club Secretariat.

Abstract:
This paper provides new evidence on private sector perceptions on intra-regional food trade in West Africa, drawing on a survey of more than 3 200 food traders operating across 32 markets in eight countries. The dataset allows for a differentiated analysis by business size, gender, country and product specialisation. The findings reveal an extensive, economically significant, and market-driven sector, though it remains predominantly informal. While over 80% of traders are unregistered, the median trader has an average monthly turnover of USD 13 289 and employs five workers. Traders respond strongly to market signals, such as price differentials and demand patterns, and more than half (56%) trade with non-neighbouring countries. Overall, 62% of traders report a positive business outlook for the next five years, with variations across countries and food products. The main constraints identified extend beyond border procedures and include limited access to finance, insecurity, and inadequate transport and market infrastructure. This analysis points to a strong but under-leveraged market dynamic and underscores the need for better-adapted policies to unlock the potential of intra-regional food trade.

Keywords: intra-regional food trade, trade, private sector, SMEs, food systems, West Africa, Africa.

JEL Codes: F13, Q17, L26, J46, R12

Acknowledgements:
This report was prepared by the Sahel and West Africa Club Secretariat (SWAC/OECD). The work was led by Koffi Zougbédé and Alban Mas Aparisi, under the supervision of Philipp Heinrigs, Head of Division. Data analysis was carried out by Jill Bouscarat, Rebecca Gramiscelli-Hasparyk, Alban Mas Aparisi, and Koffi Zougbédé. Data collection in the countries covered by the survey was conducted in collaboration with the West African Association for Cross-Border Trade in Agro-Forestry-Pastoral and Fisheries Products (WACTAF) and coordinated by Motchosso Justin Matitoma, Regional Trade Expert and Permanent Secretary of WACTAF. Sèlidji Hermann Tossou provided support in cleaning the data. The report benefited from discussions held during two public–private dialogues organized as part of a ground-truthing process—in Abidjan (October 2024) and Accra (February 2025). The authors wish to express their gratitude to the ECOWAS Commission for their support and valuable insights. Special thanks are extended to the team of the GIZ ECOWAS Agricultural Trade (EAT) Programme for their technical contributions and collaboration, notably Arne Schuffenhauer, Project Leader; Evince Yegbemey, Senior Regional Advisor; and Fabian Pflume, Advisor. The English version of the report was edited by Arianna Ingle. Renaud Madignier did the report layout and graphic design, and Lia Beyeler prepared the manuscript for publication.

THE SAHEL AND WEST AFRICA CLUB

The Sahel and West Africa Club (SWAC) is an international platform whose Secretariat is hosted by the Organisation for Economic Co-operation and Development (OECD). SWAC produces and maps data, provides informed analyses and facilitates strategic dialogue, to better anticipate transformations in the region and their territorial impacts. Through its retrospective and prospective approach, it promotes more contextualised policies as levers for regional integration, sustainable development and stability. Its areas of work include food systems transformations; urbanisation; cities, territories and the environment; and security.

Its Members and financial partners are Austria (Federal Ministry of European and International Affairs/Austrian Development Agency), Belgium (Ministry of Foreign Affairs, Foreign Trade and Development Cooperation), Canada (Global Affairs Canada), CILSS (Permanent Interstate Committee for Drought Control in the Sahel), the ECOWAS (Economic Community of West African States) Commission, the European Union, GIZ (Deutsche Gesellschaft für Internationale Zusammenarbeit), France (Ministry for Europe and Foreign Affairs/Agence française de développement), Luxembourg (Ministry of Foreign and European Affairs, Directorate for Development Cooperation and Humanitarian Affairs), the Netherlands (Ministry of Foreign Affairs), Spain (Spanish Agency for International Development Cooperation), Switzerland (Swiss Agency for Development and Cooperation/Federal Department of Foreign Affairs) and the UEMOA (West African Economic and Monetary Union) Commission.

For more information: http://www.oecd.org/swac

TABLE OF CONTENTS

ACRONYMS AND ABBREVIATIONS

Afreximbank	African Export-Import Bank
AfCFTA	African Continental Free Trade Area
CILSS	Permanent Interstate Committee for Drought Control in the Sahel
ECOWAS	Economic Community of West African States
SMEs	Small and medium-sized enterprises
USD	United States dollar

KEY FINDINGS

- The survey collected information from more than 3 200 food traders across eight countries within the region: Benin, Côte d'Ivoire, Guinea, Liberia, Nigeria, Senegal, Sierra Leone and Togo. While most respondents were nationals of the countries where the survey markets are located, 6.5% were traders from other West African countries such as Mali and Burkina Faso.

- Most respondents are informal actors—83% of surveyed food traders are unregistered, and 83% do not hold an import/export business certificate.

- Regional food trade is a sizeable business despite informality with the top quartile reporting average monthly turnovers of around USD 143 000. The median food trader employs over five people and handles monthly transactions worth USD 13 289, with some gender disparities. For example, women's median monthly turnover (USD 8 140) is 57% lower than men's (USD 19 023), and their average workforce is smaller (4.3 versus 6.2 employees).

- Overall, respondents trade over 129 distinct products, corresponding to 10 food groups including staple crops, livestock, fruits, vegetables, and processed foods. One-third of respondents reported trading in three or more different food groups indicating the strong prevalence of diversified food trade businesses.

- The survey points to the long-distance and networked nature of regional food trade in West Africa. On average, food markets surveyed trade with nearly nine other West African countries. Respondents mostly trade beyond their immediate neighbours: 56% indicated that their preferred regional trading partners are non-bordering countries.

- Market determinants, such as the larger demand on the regional market (60% of respondents) and price differentials between markets (50%) are the primary motivation for engaging in intra-regional food trade in West Africa.

- As top three constraints needing improvement, respondents identified trade and tax restrictions (42%), border procedures (40%) and ease of access to loans (40%) as their main issues. They are followed by security (38%), transportation infrastructures (30%), and access to market information (20%). Ease of access to loans was most frequently mentioned as the primary constraint by respondents (22%).

- Despite the numerous challenges facing intra-regional food trade in West Africa, more than 40% of food traders surveyed indicated that their business activities had improved over the last five years, while an additional 20% said their situation had remained stable. Looking ahead, traders expressed strong optimism: 62% believe their business will improve in the next five years.

- Awareness and satisfaction with the role of national governments and Economic Community of West African States (ECOWAS) in supporting regional food trade are low. Nearly 80% of respondents reported being unaware of the border tax exemption for agricultural and food products under the ECOWAS Trade Liberalisation Scheme (ETLS), and 87% stated they had never benefited from any ECOWAS initiative. Among the 13% who did recognise at least one positive measure, the most frequently mentioned were the free movement of goods and people (52%) and trade tax exemptions (19%).

WHY TRADER PERSPECTIVES MATTER FOR REGIONAL FOOD TRADE

Intra-regional food trade plays a fundamental role in West Africa's economic development. Valued at more than USD 10 billion annually (OECD/SWAC, 2025), it contributes an estimated 68 trillion kilocalories each year—spanning more than 130 products—enough to feed one-quarter of West Africa's population (OECD/SWAC, 2025). By 2030, regional food demand is projected to reach USD 480 billion, driven by urbanisation and rising incomes. This growth offers major opportunities for the private sector to expand. Yet intra-regional food trade remains hampered by persistent barriers: border frictions, inadequate infrastructure, limited access to finance, inconsistent regulations, and weak market information systems.

Despite numerous initiatives to accelerate food trade in the region, key questions remain largely unanswered: Which constraints do traders themselves see as most significant? Where do they perceive growth opportunities? How do they assess policy support? And how do these perspectives vary across countries, products, and trader profiles?

To address these gaps, the OECD Sahel and West Africa Club (OECD/SWAC), in collaboration with the West African Association for Cross-Border Trade in Agro-Forestry-Pastoral and Fisheries Products (WACTAF)[1], conducted the first large-scale perception survey of food traders in West Africa. Two public–private dialogue workshops with 50 regional food companies, chambers of commerce and public sector stakeholders further enriched the findings.

By bringing private-sector perspectives to the forefront, this report seeks to foster more informed dialogue between West Africa's food traders and policymakers at both national and regional levels. It aims to support policies and regulations that better reflect traders' needs, strengthen the business environment, and ultimately promote greater intra-regional food trade.

The report is organised into four sections. The first section presents the survey approach and methodology. The second section reviews the profile of traders, including informality, scale, diversity, and territorial dimensions. The third section analyses traders' perceptions of their regional food trade environment, highlighting key drivers, challenges, and outlooks. The final concludes with recommendations on how to improve the food trade environment and unlock the full potential of regional markets.

SURVEY APPROACH AND METHODOLOGY

Scope of the survey

The survey offers a complementary perspective to macro-level analyses based on food trade data (OECD/SWAC, 2025), by capturing the perceptions of informal and formal regional food traders on their constraints, opportunities and outlook, as well as their awareness and evaluation of policies designed to support them. This bottom-up approach shifts the focus from trade flows to trade actors. The survey involved 3 225 food traders across eight West African countries: Benin, Côte d'Ivoire, Ghana, Liberia, Nigeria, Senegal, Sierra Leone and Togo (Table 1).

Table 1.
Countries covered by the survey, with number of respondents and share of women

Countries	Benin	Côte d'Ivoire	Ghana	Liberia	Nigeria	Senegal	Sierra Leone	Togo	Total
Number of respondents	605	265	504	153	541	97	382	678	**3 225**
Share of women	50%	14%	50%	54%	25%	5%	68%	79%	**50%**
Country share of total	19%	8%	15%	5%	17%	3%	12%	21%	**100%**

Survey methodology and data collection

The survey employed a methodology centred on regional food market hubs, data collection on the numerous formal and informal regional border crossings being unfeasible. Fieldwork took place between June and August 2024 across 81 food markets in eight West African cities: Abidjan, Accra, Cotonou, Dakar, Freetown, Lagos, Lomé and Monrovia. These urban centres were selected for their position as central nodes in intra-regional food trade, concentrating large numbers of businesses. In each city, the survey covered at least three markets and captured activity in a minimum of eight different product groups.

The food traders on the market were surveyed only if they reported conducting intra-regional food trade. The methodology emphasised inclusivity and diversity of perspectives by purposively including a range of traders in terms of scale—from small-scale operators to larger actors—as well as food product specialisation and gender. The respondents are almost gender balanced, although discrepancies exist at country and product level. The surveyed businesses were primarily small and medium enterprises operating within food markets, thereby excluding the largest formalised regional agrifood companies that function outside these systems.

Data was collected by trained national teams, supervised by regional coordinators. The questionnaires were translated into ten languages: Dendi, English, Ewe, Fongbé, French, Ga, Hausa, Krio, Twi and Wolof to ensure clear understanding among respondents. The questions addressed business operations, ease of trade, perceived constraints, government and ECOWAS policies, and future expectations.

All figures presented in this study were calculated by the authors using the survey data.

Data limitations and consolidation

Due to the survey's purposive design, the survey results are not statistically representative of the entire regional food trader population. Rather, they are intended to inform practitioners and policymakers by revealing previously unexplored perceptions on the regional food trade environment, based on a large sample—the first insight of this kind in the region.

The findings should also be interpreted in relation to the profile of firms covered by the survey. They primarily reflect the perceptions of traders operation through market-based regional trading systems and may therefore not fully capture the constraints faced by larger formal agrifood firms, including those serving formal retail channels or higher-value segments.

The survey findings were triangulated with two ground-truthing public-private dialogues held in Abidjan (October 2024) and Accra (February 2025). The results were presented and discussed with participants from regional food small and medium enterprises, chambers of commerce, business associations, national statistical institutions, government (Ministries of Trade and Agriculture) and regional organisation representatives (ECOWAS, CILSS). The dialogues offered an opportunity to gather additional information on the perception of the food trade environment by the private sector that fed into this report.

PROFILING TRADERS: INFORMAL YET HIGH-VALUE AND LONG-DISTANCE ACTORS

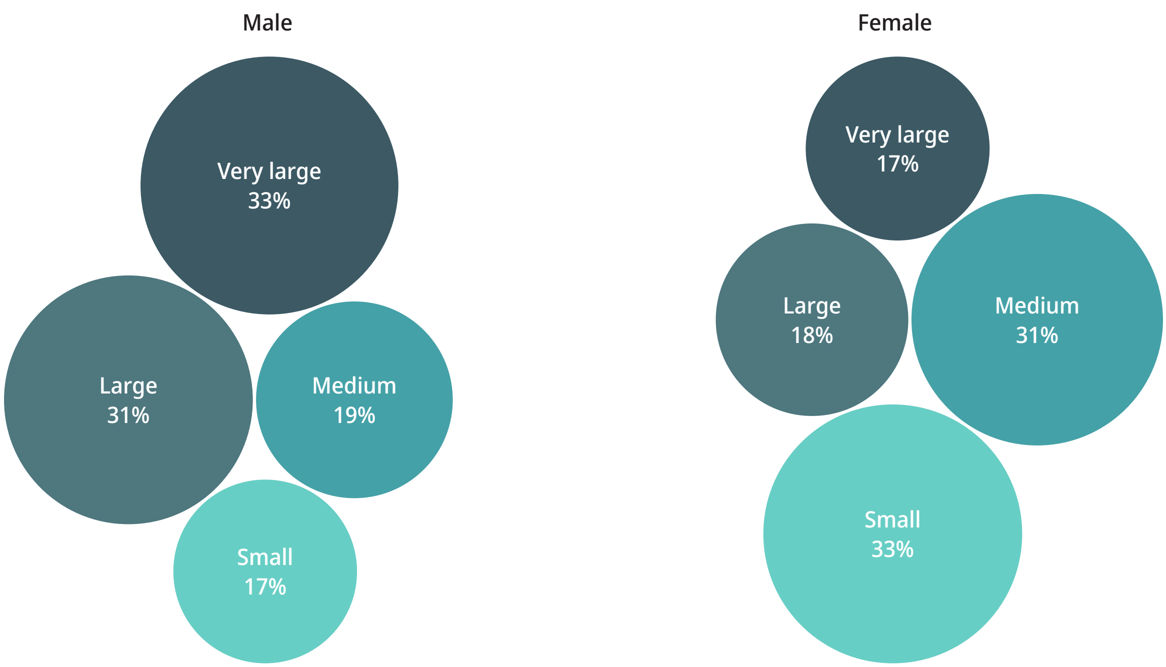
The survey provides a window into the rich and nuanced profiles of traders operating in regional food markets. It suggests larger-than-expected trading values of diverse food items, strong dominance of informality, and the existence of dense, and at times long-distance market networks.

Regional food trade is a sizeable business

The survey shows that food trading in West Africa is far from marginal: the median food trader employs over five people and handles monthly transactions worth USD 13 289, aligning with macro-level estimates of a sizeable regional food trade sector of more than USD 10 billion, dominated by large trucks carrying 35 tons on average (OECD/SWAC, 2025). Yet, disparities are stark—small traders of the first quartile report median monthly food trading transactions of just USD 800, while those in the top quartile reach USD 66 365, and an average of USD 143 000, reflecting a spectrum from small to very large enterprises.

Traders are distributed following these categories: small (USD 100–4 485 of reported monthly value of food traded), medium (USD 4 485–13 289), large (USD 13 289–32 733), and very large (USD 32 733–996 677). Within this landscape, women operate at a clear disadvantage: their median monthly turnover (USD 8 140) is 57% lower than men's (USD 19 023), and their average workforce is smaller (4.3 versus 6.2 employees). These figures highlight both the significant economic weight of food trade and the persistent gender gaps that limit women's ability to scale and compete (OECD/SWAC, 2019).

Figure 1.
Distribution of respondents, by firm size and gender



Note: Firm size is proxied by the quartile of reported monthly value of food being traded (small = quartile 1, medium = quartile 2, large = quartile 3, very large = quartile 4).

Regional food trade is dominated by informal actors

An estimated 83% of surveyed food traders are unregistered, and 83% do not hold an import/export business certificate (Figure 2). Importantly, informality spans socioeconomic categories affecting small and large traders, and both men and women (see Figure 3). Overall, informality rates are slightly higher among women traders (84%) than male (81%), largely due to the lower informality rate among men traders running small firms (65%) (see Figure 3).

Figure 2.
Status of registration and ownership of an import/export business certificate

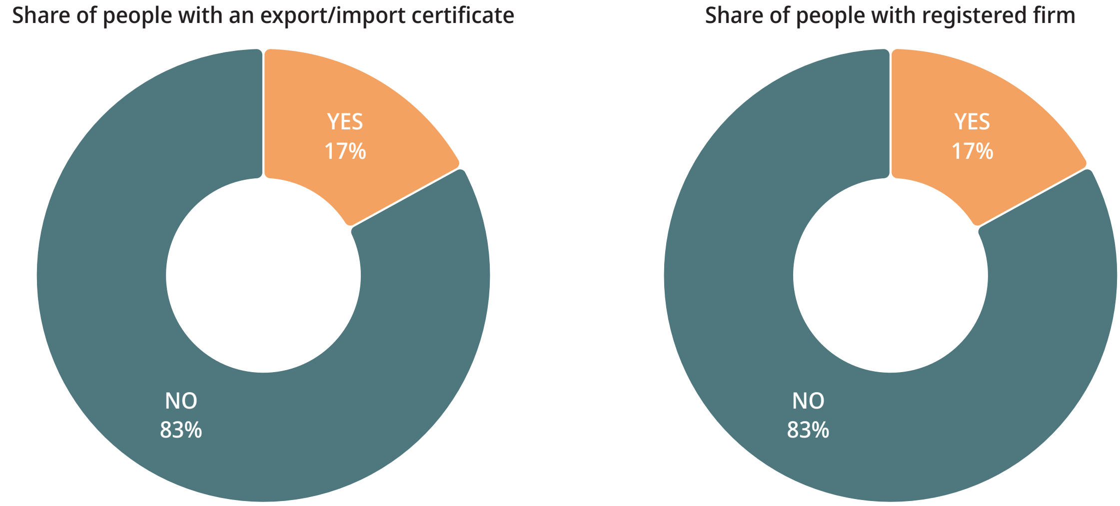
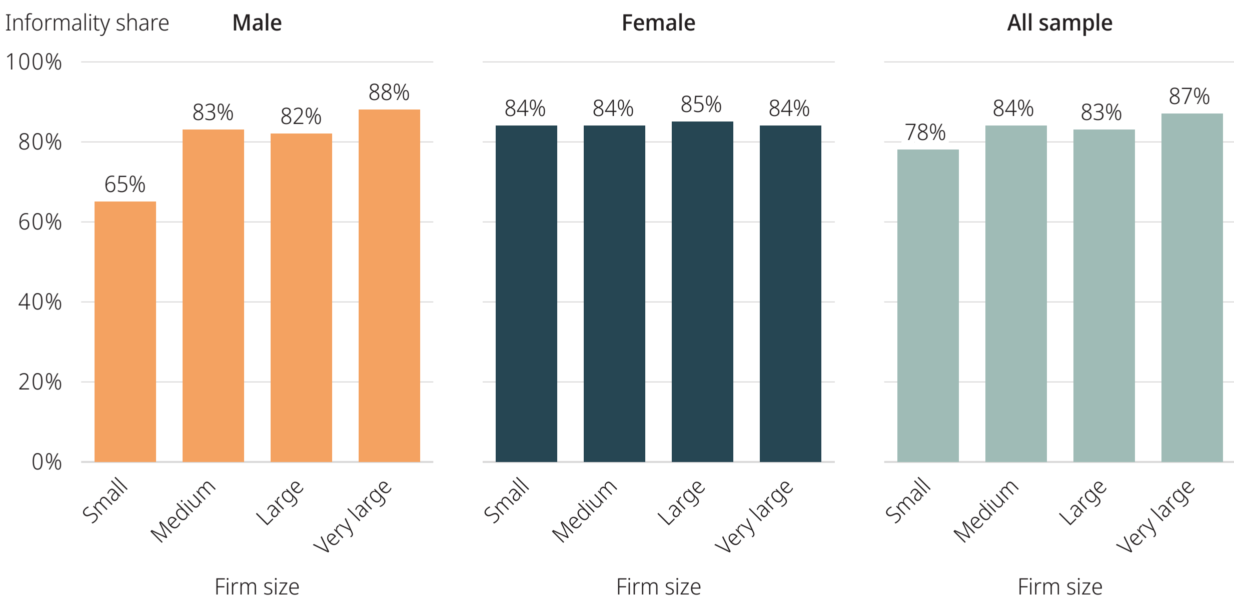


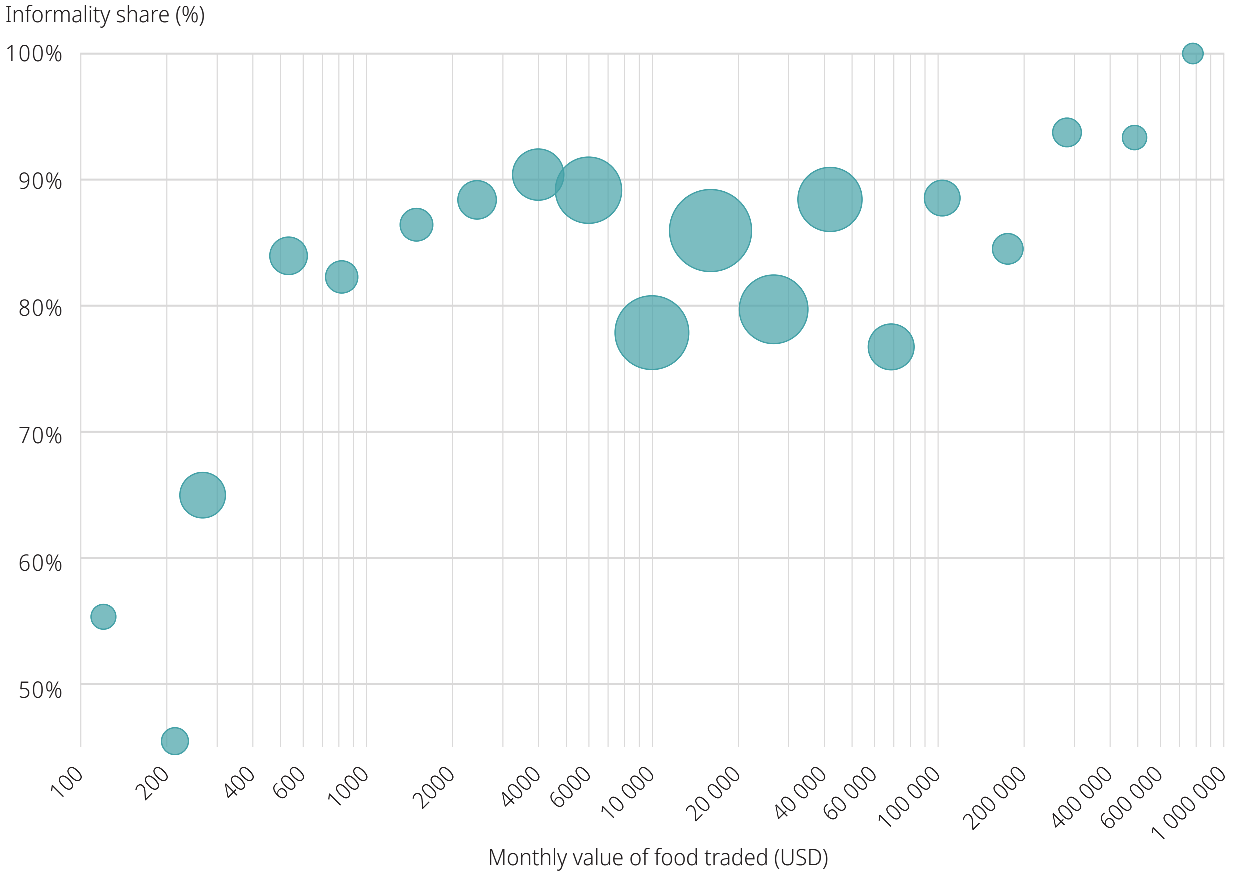
Figure 3.
Respondent formality status, by firm size and gender



Contrary to prevalent narratives, large size food trading firms surveyed are not more formalised than the smaller ones (Figure 4), with 87% of very large firms being informal, against 78% for the smaller ones. Among the top 8% traders, which trade over USD 100 000 worth of food regionally every month, 90% declared being informal.

Figure 4.

Informality rate, by monthly value of food traded range



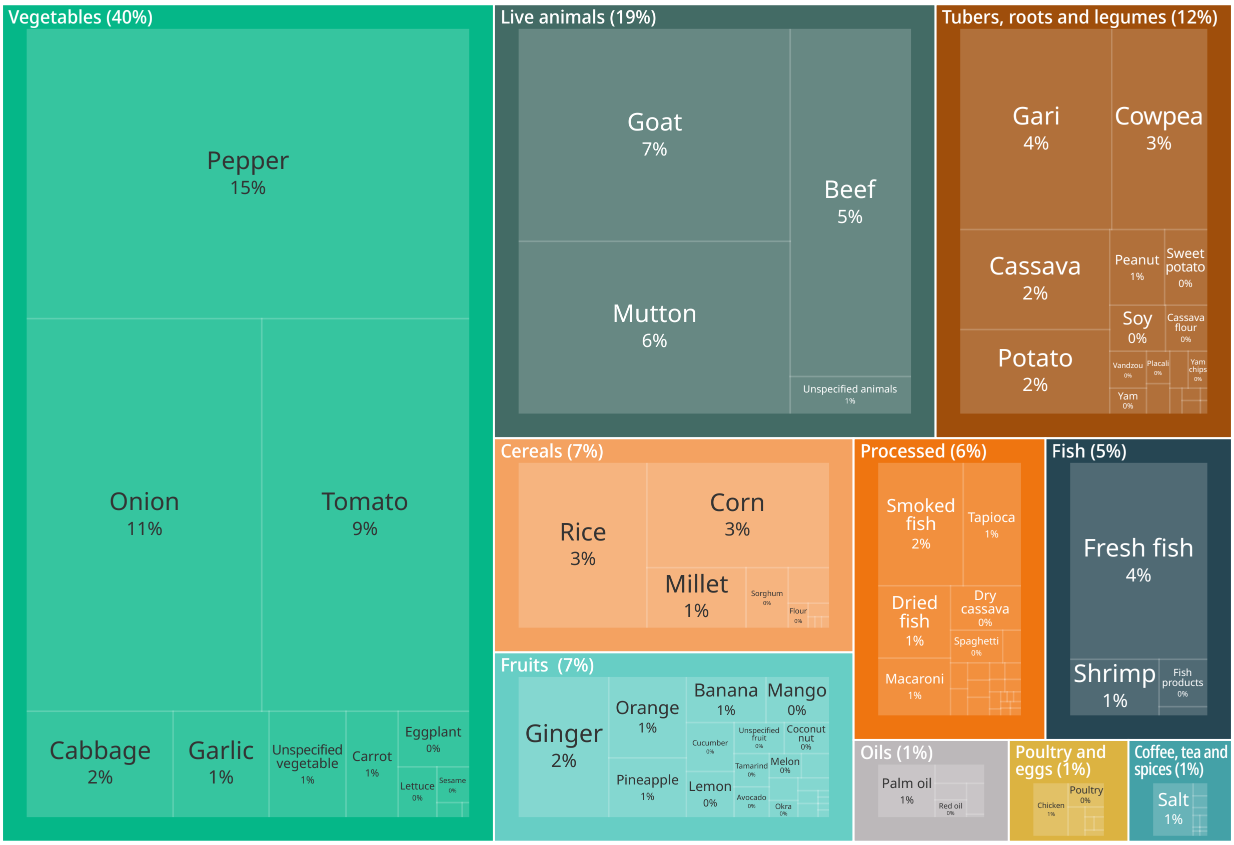
Note: Bubble size reflects the number of traders in each value cohort. The logarithmic scale on the x-axis highlights variation in informality at lower trade values, where most traders are concentrated.

Traders exchange a wide array of food products

The types of food traded on the surveyed markets are remarkably diverse, emphasising the critical role of food trade in contributing to food security and nutrition in the region. Overall, respondents trade over 129 distinct products, corresponding to 10 food groups including staple crops, livestock, fruits, vegetables, and processed foods (Figure 5). The distribution of food items exchanged by the traders surveyed is also relatively balanced, with most respondents trading vegetables (40%), live animals (19%) and tuber, roots and legumes (12%). These are followed by cereals (7%), fruits (7%), processed foods (6%) and fish (5%). The least mentioned categories are oils (1%), poultry and eggs (1%) and coffee, tea and spices (1%).

Figure 5.

Products traded by respondents, by individual product and food group

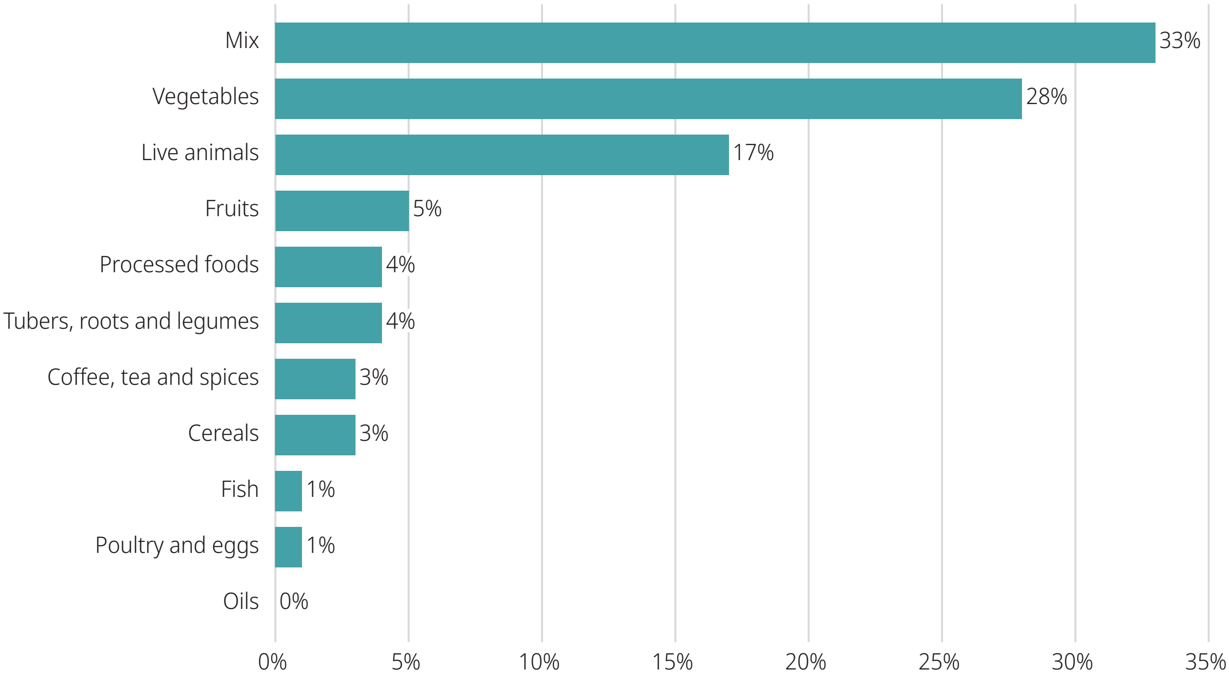


Note: Respondents could indicate trading multiple products.

Additionally, specialisation is not universal among regional food traders surveyed. One-third of respondents reported trading in three or more different food groups indicating an inclination toward diversification (Figure 6). This suggests that a significant share of traders strategically diversify across product lines to reduce risk in a dynamic, often unpredictable regional market shaped by seasonal shifts, price volatility, and supply disruptions (OECD/SWAC, 2025).

Figure 6.

Share of respondents, by food group traded

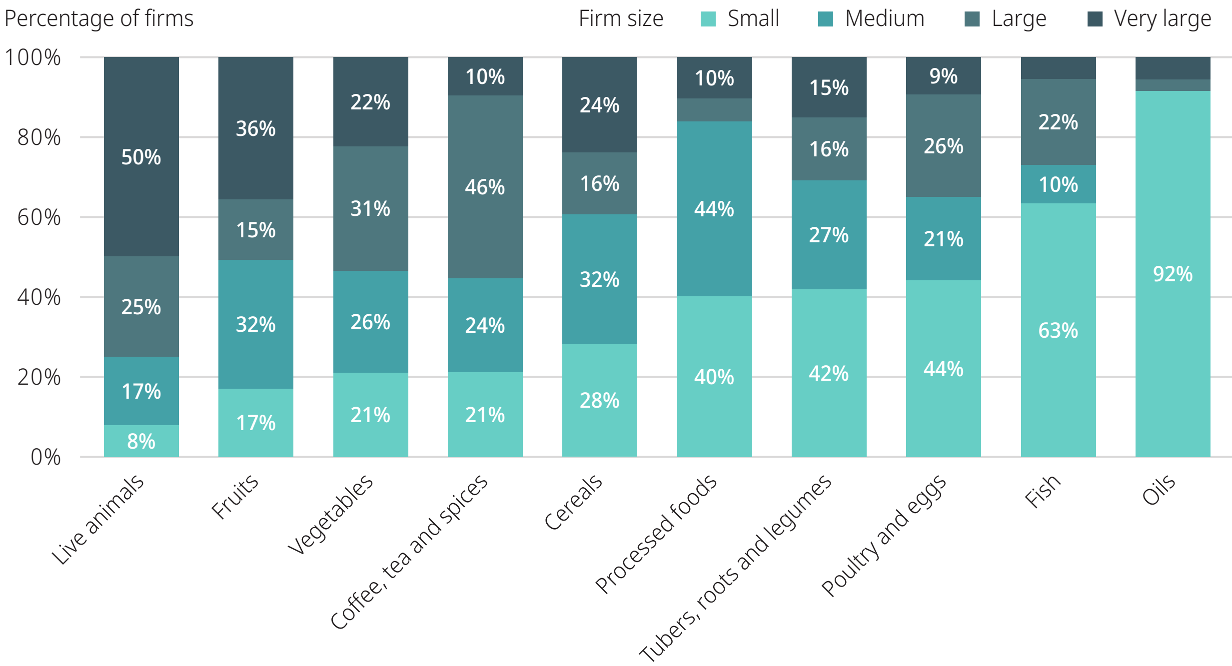


Note: Distribution of share of people who specialise in one food group or who trade in different groups (mix category), with each individual declaring up to four products.

The size distribution of firms across food groups shows a marked imbalance. Smaller enterprises dominate some sectors—most notably, fish trading, where they account for nearly two-thirds (63%), and oils, where an overwhelming 92% fall within the smallest size category. In contrast, other groups are characterised by concentration at the upper end: half of live animal traders rank among the very largest firms, while coffee, tea, and spices display a strong presence of large operators, with 46% of traders positioned in this firm category (Figure 7).

Figure 7.

Distribution of firms, by size and food group traded

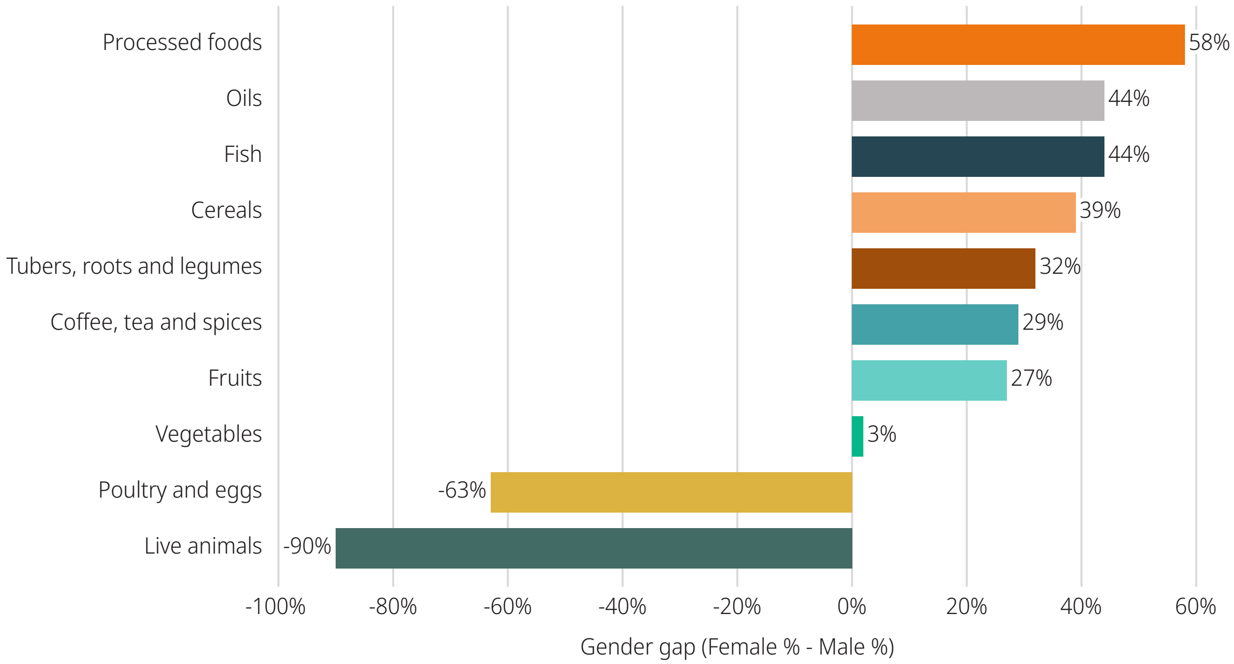


Note: The figure is based on each respondent's first declared good when asked what product they trade regionally, assumed to represent their main traded product. The number of trader respondents by food group is as follows: Cereals (280), Coffee, Tea & Spices (207), Fish (93), Fruits (204), Live Animals (577), Oils (36), Poultry & Eggs (43), Processed Foods (190), Tubers, Roots & Legumes (361), and Vegetables (1 206).

Women dominate regional food trade across nearly all food groups. They hold a strong majority in categories such as coffee, tea and spices, with a gender participation gap of +60.0 percentage points[2], fish (+59.4 percentage points), and processed foods (+52.9 percentage points). In contrast, men are significantly overrepresented in the trade of live animals (-90.0 percentage points) and poultry and eggs, (-63.0 percentage points), respectively (Figure 8). Participation in the trade of vegetables—the most common food category—is relatively balanced, showing a gap of +3.4 percentage points.

Figure 8.

Gender participation gap in regional trade, by food group



Note: The gap is calculated subtracting the men share out of the female share: positive values indicate a higher female participation share in the food group, compared to men. The number of trader respondents by food group is as follows: Cereals (280), Coffee, Tea & Spices (207), Fish (93), Fruits (204), Live Animals (577), Oils (36), Poultry & Eggs (43), Processed foods (190), Tubers, Roots & Legumes (361), Vegetables (1206).

Beyond neighbouring countries: A dense and long-distance food trade network

The survey points to the long-distance and networked nature of regional trade in West Africa, going against narratives on regional food trade that emphasise small-distance bilateral flows. While most respondents were nationals of the countries where the survey markets are located, 6.5% were traders from other West African countries such as Mali and Burkina Faso (Figure 9). These results suggest that several food markets, including those in capital cities and far from borders, serve not only as national hubs but also as connectivity points for traders from across the region.

Figure 9.

Number of respondents, by survey market and headquarters

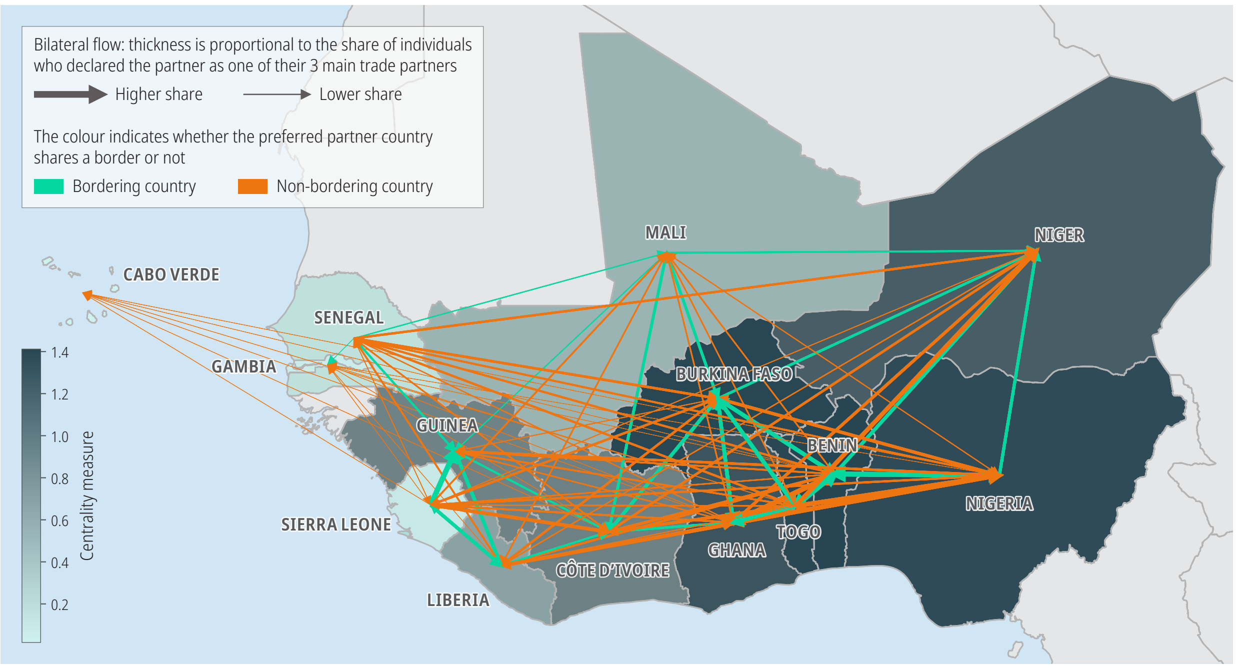
Note: Some respondents reported having headquarters in a different place from the market where they were surveyed. Bubbles represent the number of people in each market (orange) and the number of people with headquarters in each city (green).

This is further highlighted by the extensive networks of preferred partner countries reported in the survey (Figure 10). On average, food markets surveyed trade with nine other West African countries. Respondents in these markets mostly trade beyond their immediate neighbours: 56% indicated that their preferred regional trading partners are non-bordering countries.

While the network is expansive, some countries emerge as particularly central within the region's trade structure—being cited more frequently by traders across the sample as preferred partners. Benin and Nigeria which are situated on one of the region's largest food corridor, namely Abidjan-Lagos, occupy strong central positions, consistent with their recognition in the literature as major regional trade hubs and food trade powerhouses, respectively (Figure 10) (OECD/SWAC, 2025). Interestingly, Burkina Faso also appears as one of the most central nodes, despite being landlocked and, as of January 2025, having withdrawn from ECOWAS. This underscores how resilient trade relationships continue to sustain cross-border market integration beyond formal regional membership.

Figure 10.

Surveyed traders' reported country partners, by share of total responses, border status and network centrality



Note: The centrality measure is calculated as the weighted sum of how often each country is cited as a trade partner by others. For example, if Country A is mentioned by 50% (0.5) of respondents in Country B and 30% (0.3) in Country C, its centrality measure will be 0.8.

MARKET SIZE, PRICES AND NETWORKS ARE SHAPING REGIONAL FOOD TRADE

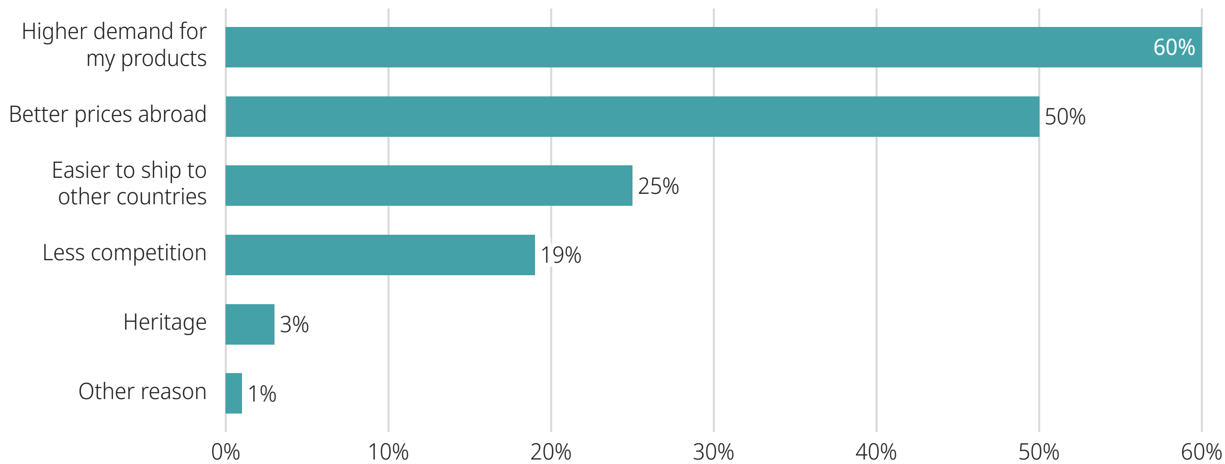
Drivers and facilitators of regional food trade in West Africa

Regional market size and prices are the main drivers of regional food trade

According to the survey, 60% of food traders cited higher demand in regional markets as one of their main motivations for engaging in intra-regional trade (Figure 11). This underscores the pivotal role of the larger and more dynamic regional market in driving food trade beyond national boundaries. It suggests that traders are highly responsive to demand trends outside their home countries, particularly capitalising on the rapid growth of urban food markets across the region (OECD/SWAC, 2025). Recent OECD/SWAC estimates show that urban food demand, for instance, was worth USD 15 billion dollars in Lagos alone in 2020; and regional food demand is projected to go from USD 207 billion in 2020 to USD 480 billion in 2030, a 79% increase (OECD/SWAC, forthcoming).

Figure 11.

Reasons for trading food regionally



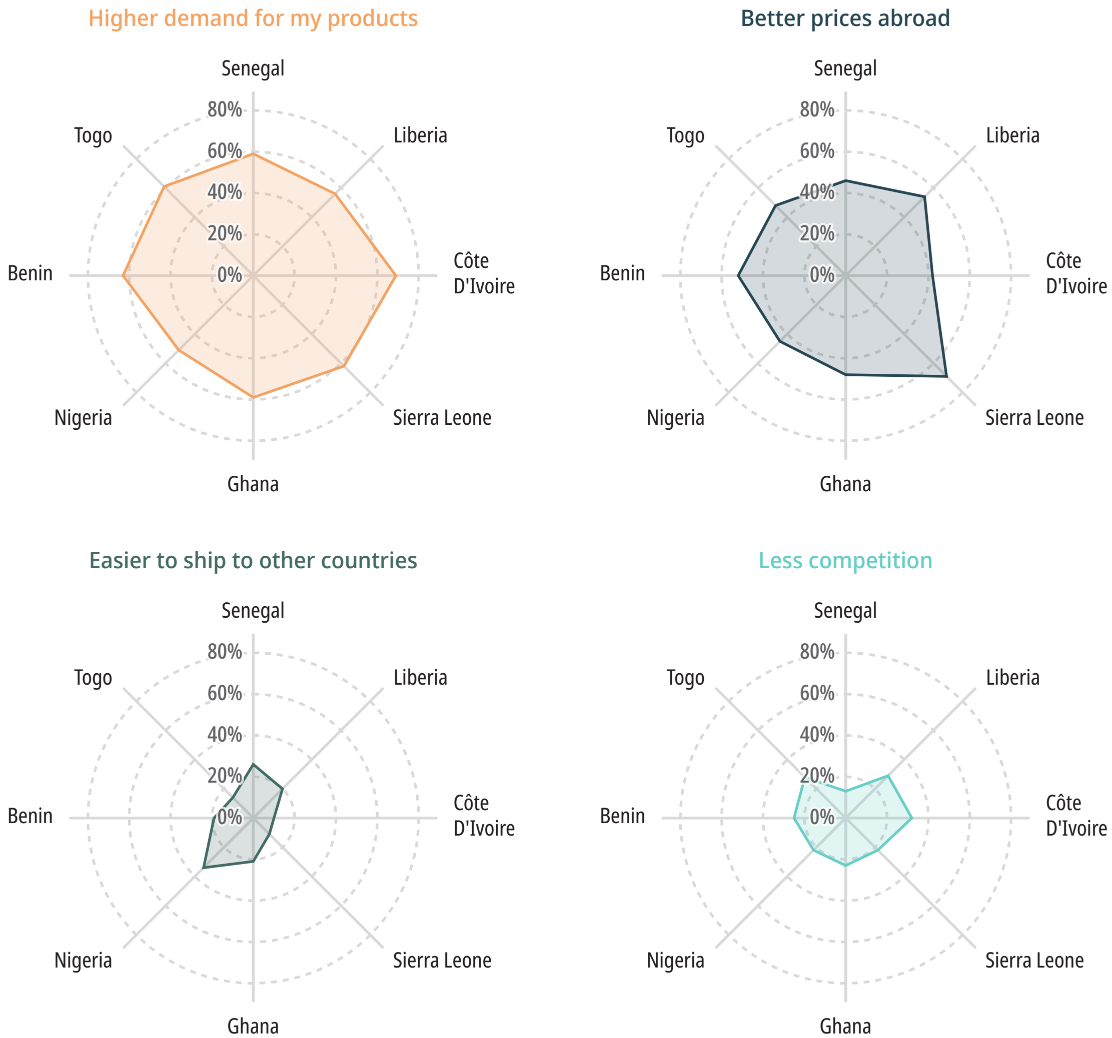
Note: Share of respondents providing each answer to the question *Why do you trade across borders?* Respondents could provide up to three responses.

In addition, 50% of respondents pointed to better prices across borders as a key reason for trading regionally, reinforcing the importance of market incentives as a primary motivation. Price differentials, driven by factors such as seasonal supply fluctuations and policy distortions, play a significant role in fostering regional food trade in West Africa (Allen, 2017).

Stronger demand and better prices abroad were the top-cited motivations for intra-regional trade in nearly every country surveyed (Figure 12). Côte d'Ivoire stands out, with 68% of respondents naming higher regional demand, reflecting the country's strong regional competitiveness and seasonal food exports to several regional partners (OECD/SWAC, 2025). In Sierra Leone, more than two-thirds of traders highlighted price incentives as a main driver—18 percentage points above the regional average, suggesting that price differentials with neighbour Guinea, the preferred partner for 21% of respondents[3], are key to the country's regional food trade. Meanwhile, in Nigeria, the share of respondents citing "less competition" as a motivating factor (34%) was nearly double the regional average (19%), suggesting that traders may be reacting to saturation or constraints in the domestic market.

Figure 12.

Reasons for trading food regionally, by country of interview

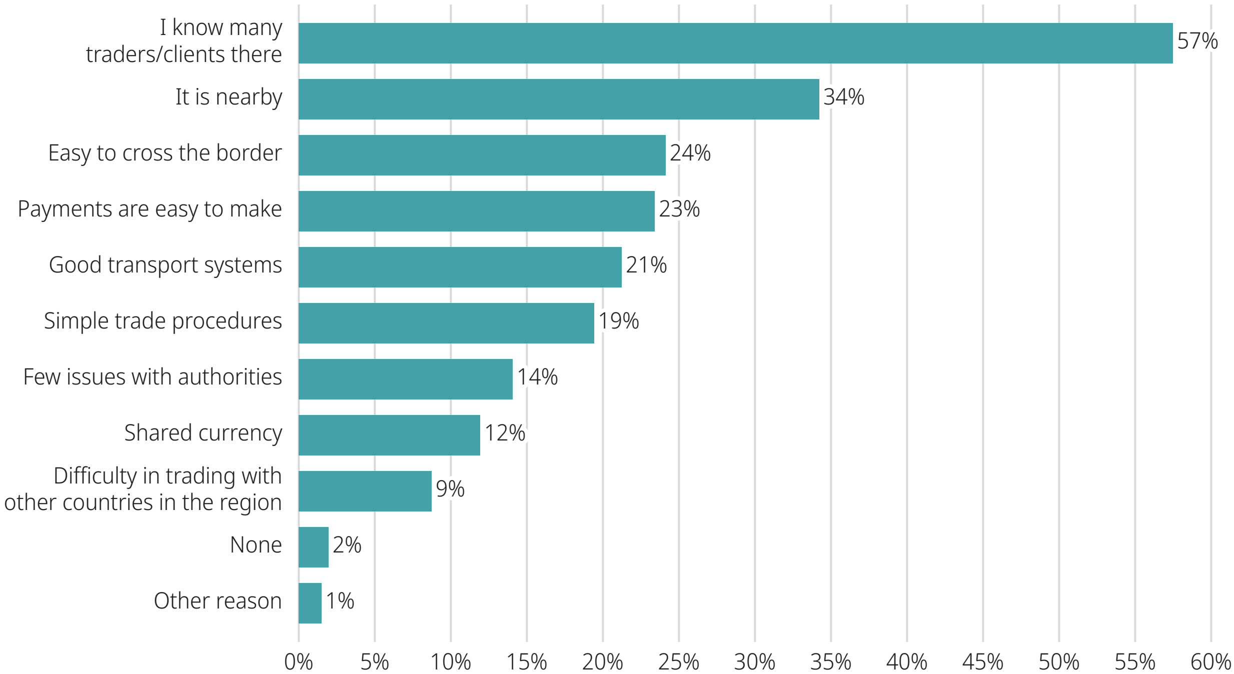


Note: Share of respondents providing each answer to the question *Why do you trade across borders?* Respondents could provide up to three responses.

The network as the key facilitator of regional food trade

The survey results shed light on the central role of personal and professional networks in enabling regional food trade. A strong 57% of respondents cited knowing many customers or traders in their preferred food trade country partner as the main reason for choosing to operate there—well above proximity (34%) and ease of crossing the border (24%), two factors often portrayed as the primary determinants of intra-regional trade in the region (Figure 13).

Figure 13.
Reasons for trading with the preferred regional partner

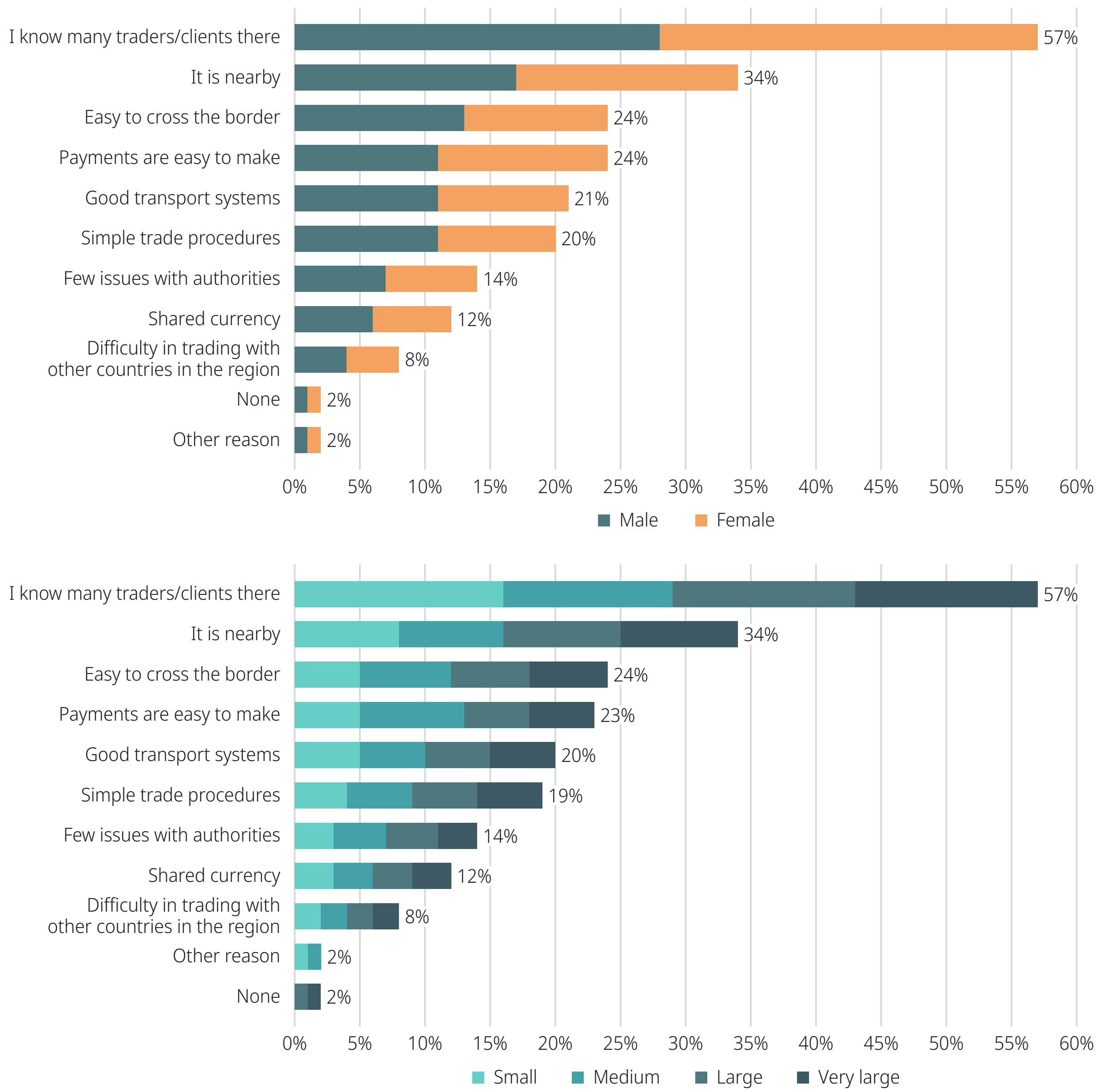


Note: Share of respondents providing each answer to the question *Why is it the easiest country to trade with?* with regards to their preferred regional partner. Respondents could provide up to three responses.

The importance of social networks in facilitating regional food trade is a consistent finding across different trader profiles, underscoring their central role in shaping trading behaviour. Whether disaggregated by gender or business size, the data reveals that access to and participation in trusted social and professional networks remain a key enabler of intra-regional trade (Figure 14).

Figure 14.

Reasons for trading with the preferred regional partner, by gender (top) and firm size (bottom)



Note: Share of respondents, by gender and firm size, providing each answer to the question *Why is it the easiest country to trade with?* with regards to their preferred regional partner. Respondents could provide up to three responses.

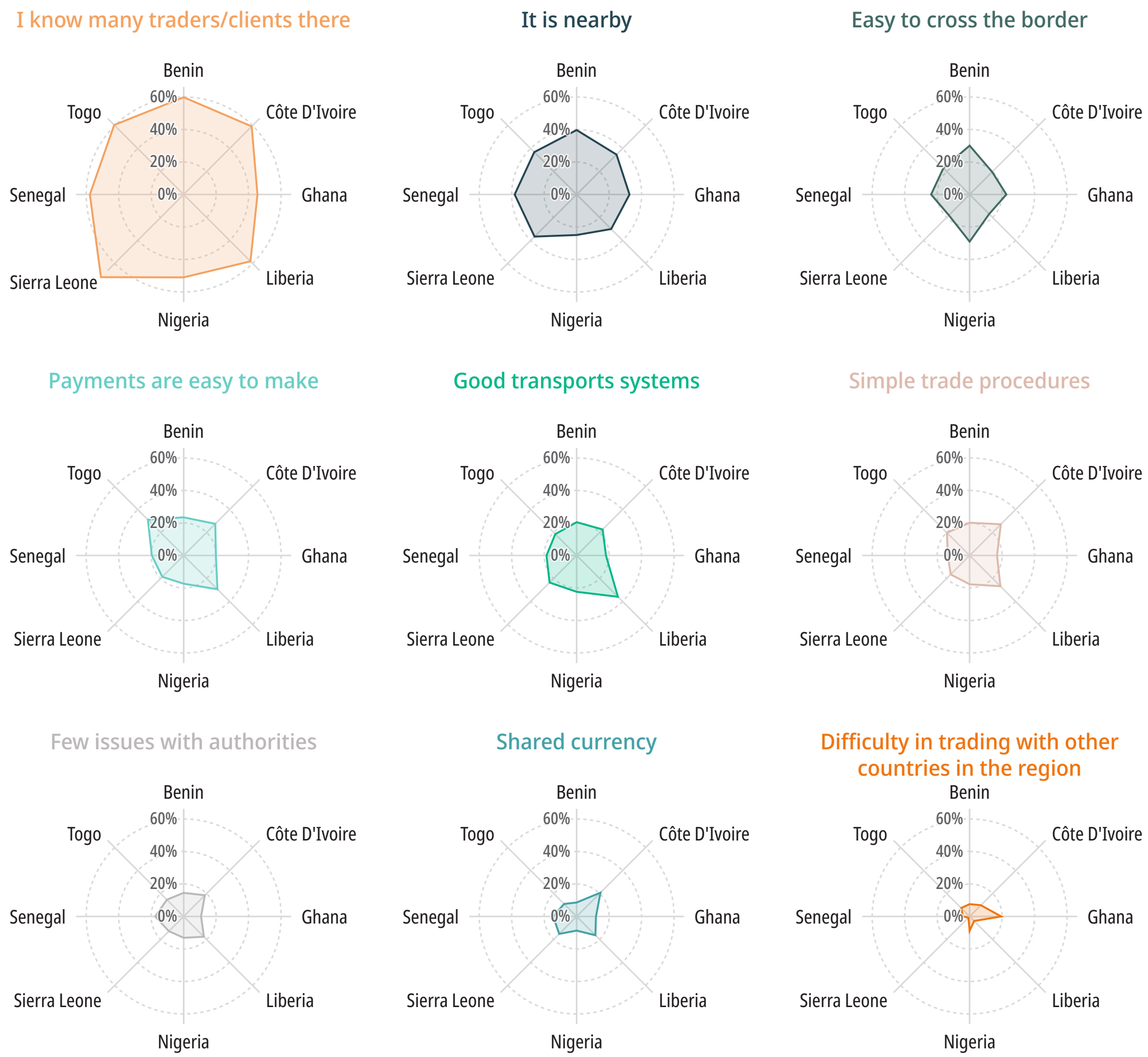
At country level, Sierra Leone stands out as a strong outlier, with nearly three quarter of respondents citing existing trader and client relationships as a driver, 15 points above the average (Figure 15). Liberia, meanwhile, is an outlier in citing good transport systems (36%, 15 points above average), followed by Sierra Leone (24%), suggesting a greater reliance on infrastructure quality to drive regional trade in the country.

Côte d'Ivoire ranks high across several institutional factors, including shared currency (21%), simple trade procedures (27%), and fewer issues with authorities (18%), suggesting a generally more favourable and predictable trade environment.

In contrast, Ghana shows comparatively lower shares across most reasons, pointing to more significant perceived barriers that align with the relatively negative perceptions of Ghanaian respondents of their trade performance and outlook.

Figure 15.

Reasons for trading with the preferred regional partner, by country of interview

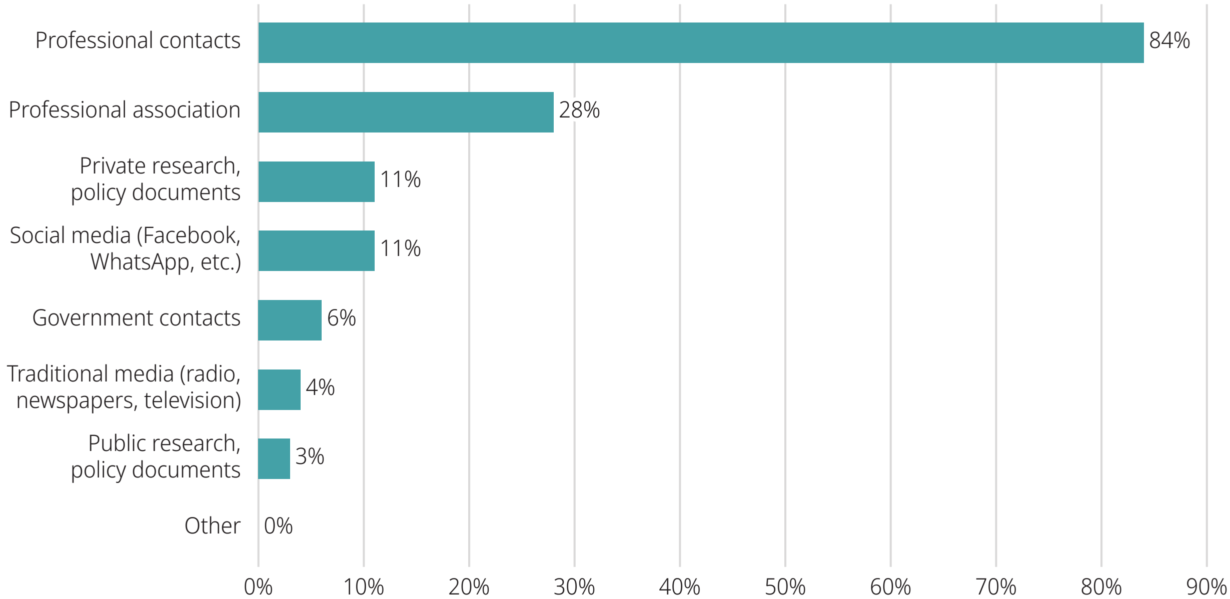


Note: Share of respondents, by country, providing each answer to the question *Why is it the easiest country to trade with?* with regards to their preferred regional partner. Respondents could provide up to three responses. The figure highlights the nine most frequently mentioned reasons.

Networks also dominate as the main source of market information. About 84% of respondents identified professional contacts as their primary source of information on market opportunities, far exceeding professional associations (28%) (Figure 16). Interestingly, formal traders rely even more on their professional networks (89%) than informal ones (83%), and report using less research and policy documents (8%) than their informal counterparts (15%). The use of professional associations is on a similar level for both types of traders.

Figure 16.

Channels used by food traders to access market opportunities



Note: Share of respondents providing each answer to the question *How do you typically find out about food market opportunities in the region?* Respondents could provide up to three responses.

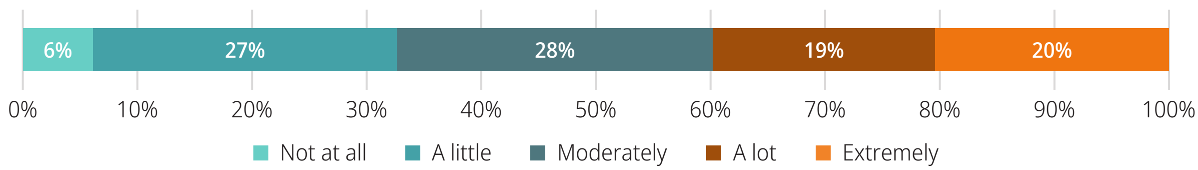
Constraints to regional food trade in West Africa

Border constraints: A significant but not overwhelming challenge

Border-related issues, such as tariffs, bribery, harassment, opaque fees and custom procedures occupy a prominent place in policy debates on intra-regional food trade. The survey results confirm that these constraints are significant for many traders, but they also suggest a more differentiated picture than is sometimes assumed. Overall, 39% of respondents reported that border constraints affected their trading activities "a lot" or "extremely", while 28% reported a "moderate" effect. By contrast, roughly one-third said they were affected only a little or not at all (Figure 17). This suggests that border frictions are an important constraints, but not one that is experienced as overwhelmingly severe by most traders across the region.

Figure 17.

Perceived impact of border constraints on food traders

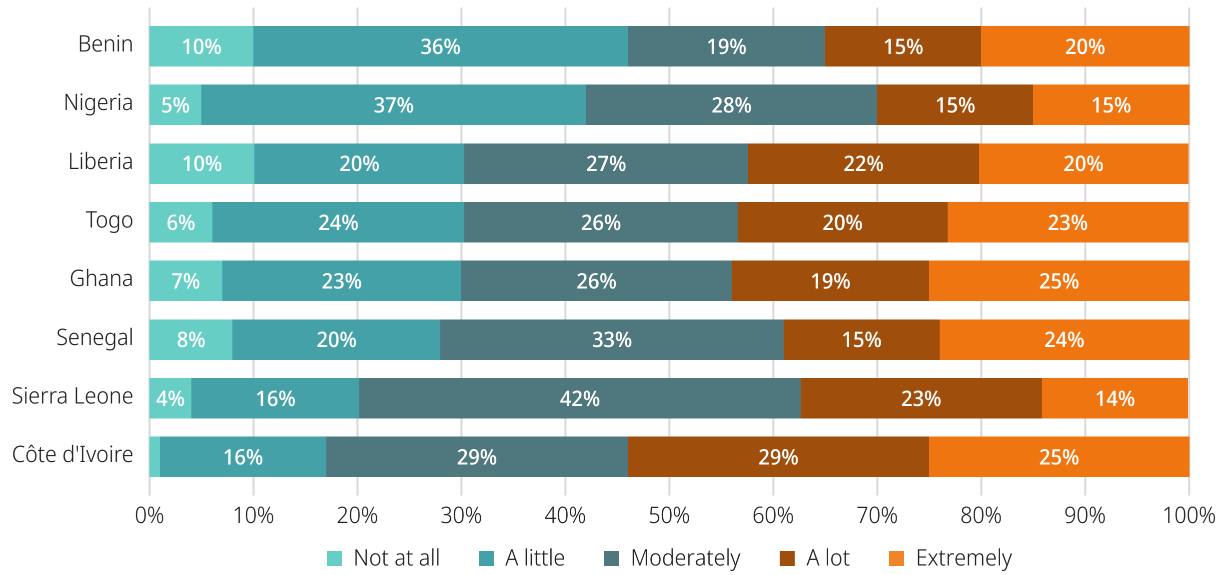


Note: Share of respondents providing each answer to the question "*On a scale of 1-5, how much have trade constraints at the border affected your trading activities. Rankings have been presented as "not all" (1); "a little" (2), "moderately" (3), "a lot" (4) and "extremely" (5) to facilitate the interpretation*.

The aggregate picture also masks substantial cross-country variation. In Côte d'Ivoire and Ghana, border constraints were reported as severe much more frequently, with 54% and 44% of respondents, respectively, stating that they affected their activities "a lot" or "extremely" (Figure 18). In Benin and Nigeria, by contrast, traders more often reported limited disruption, with 46% and 42%, respectively, saying that border constraints affected them only "a little" or "not at all". Other countries lie between these two poles. These differences suggest that, while border frictions are not uniformly overwhelming at the regional level, their practical burden varies substantially across national and corridor-specific contexts.

Figure 18.

Perceived impact of border constraints on food traders, by country



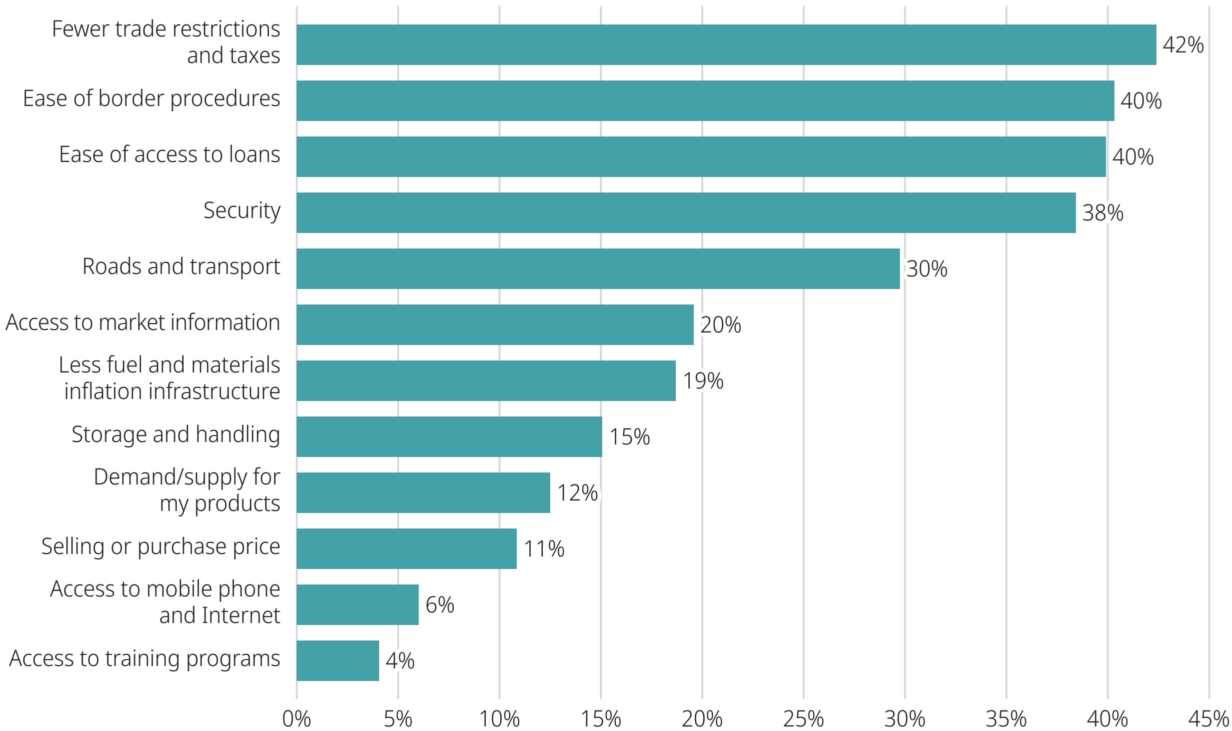
Note: Share of respondents providing each answer to the question "*On a scale of 1-5, how much have trade constraints at the border affected your trading activities. Rankings have been presented as "not all" (1); "a little" (2), "moderately" (3), "a lot" (4) and "extremely" (5) to facilitate the interpretation*. Countries are ordered from lower to higher impact on traders' activities.

Beyond borders: The multiple constraints to the food trade environment in West Africa

When traders were asked to identify up to three priorities for improving their business environment, border-related reforms featured prominently. The most frequently cited priority was fewer trade restrictions and taxes (42%), followed closely by easier border procedures (40%) (Figure 19). At the same time, traders also identified wider constraints in the food trade environment that extend beyond the border itself. These included easier access to loans (40%), security (38%), and roads and transport (30%). Lower shares referred to access to market information (20%), lower fuel and material inflation (19%), improved storage and handling infrastructure (15%), and demand and supply conditions for their products (12%).

Figure 19.

Food traders' perceived priorities for improving their business



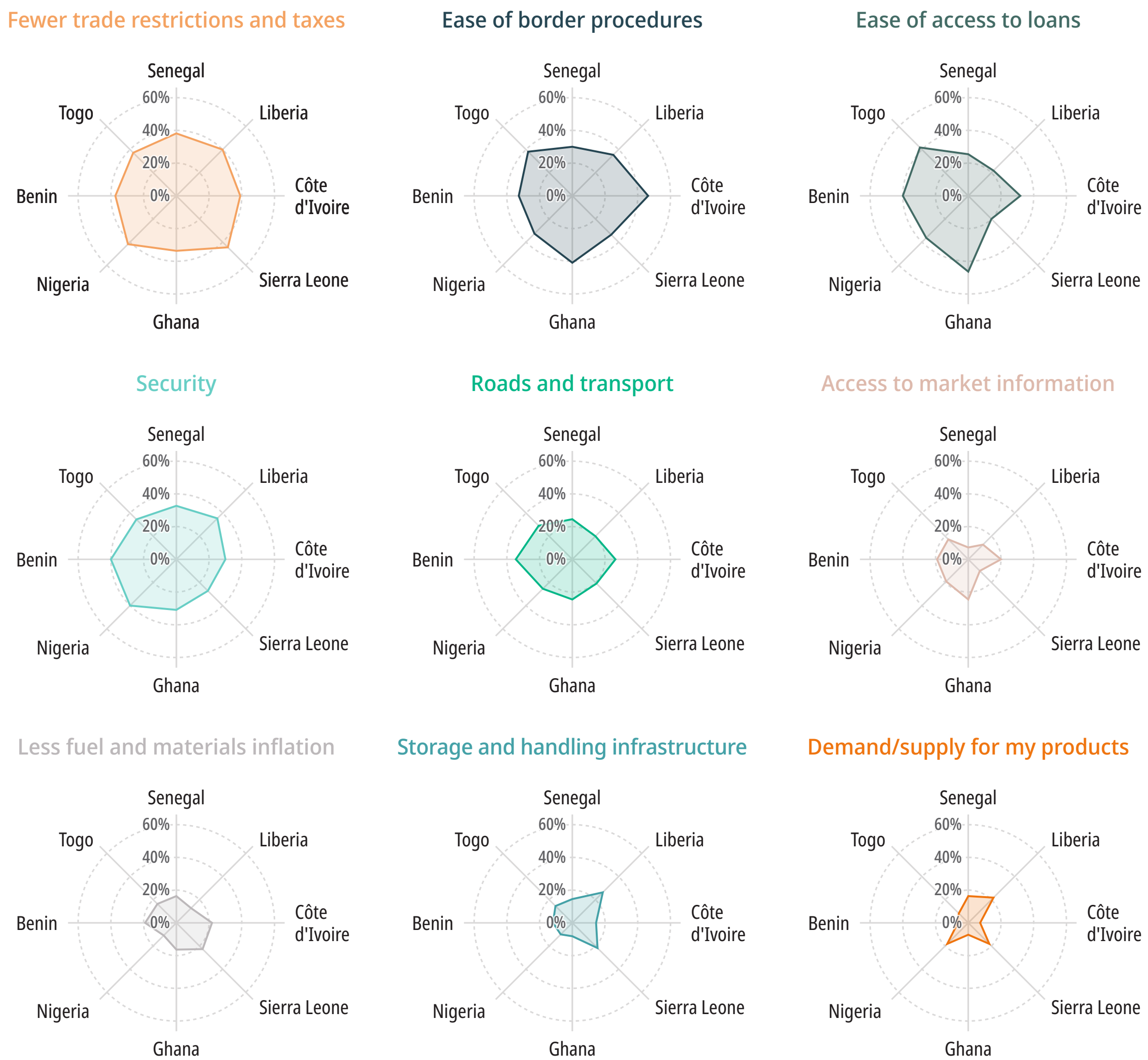
Note: Share of respondents providing each answer to the question *Please list up to three main things that need to get better for your business to do well.*

A closer look at country-level responses highlights how trade constraints are prioritised differently across national contexts (Figure 20). Access to finance stands out as a leading concern in Ghana (51%) and Togo (47%), exceeding the regional average by 11 and 7 percentage points, respectively. These findings are aligned with recent studies on productive transformation in Togo and the need to improve access to finance to foster private sector development in the country (OECD et al., 2025). Security, meanwhile, is a prominent issue in Nigeria and Benin, where 44% of respondents cited it as a priority—six points above the regional average. By contrast, concern over insecurity was less pronounced in Sierra Leone (30%), Côte d'Ivoire (33%), and Ghana (34%).

Border procedures emerged as a major barrier in Côte d'Ivoire and Ghana, with more than 45% of respondents calling for improvements. Inflation of fuel and trade materials was particularly highlighted in Sierra Leone, Ghana and Côte d'Ivoire. Trade restrictions and taxes were of higher importance, compared to the regional average of 40%, in Nigeria (46%), Sierra Leone (49%), and Liberia (44%).

Figure 20.

Food traders' perceived priorities for improving their business, by country

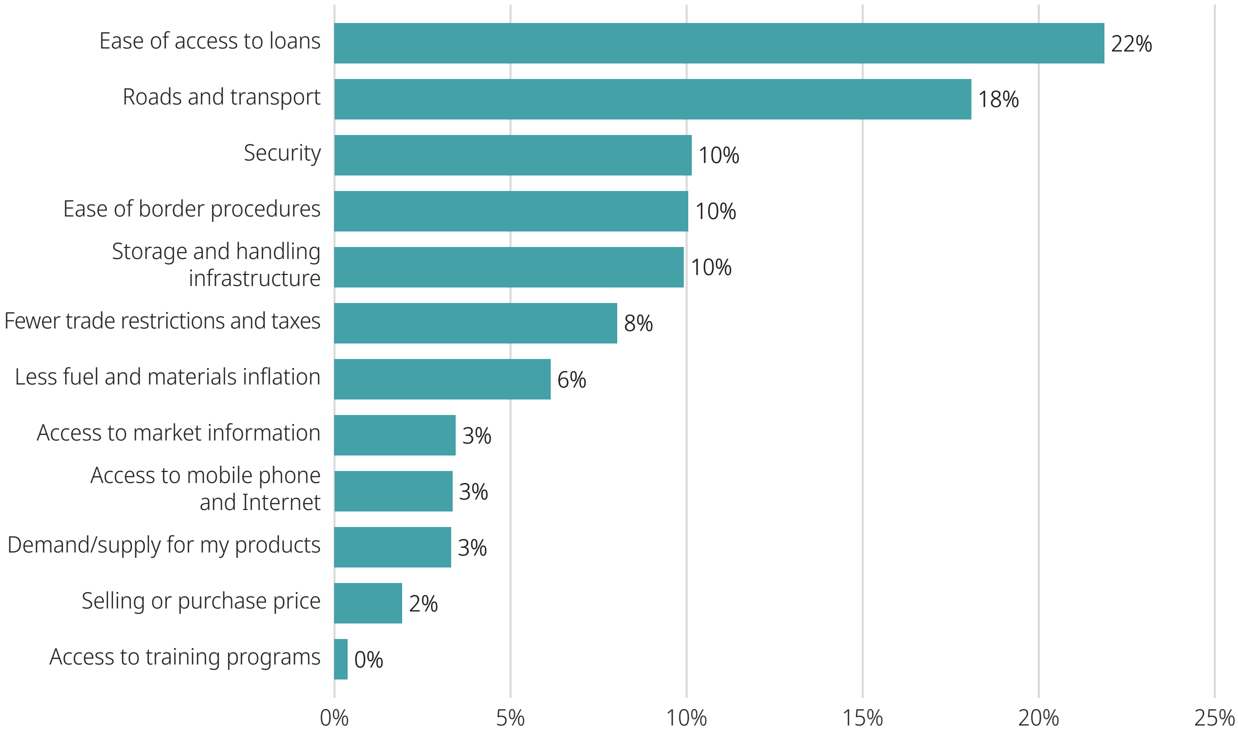


Note: Share of respondents providing each answer to the question *Please list up to three main things that need to get better for your business to do well.*

When asked to identify the single most important area for improvement, traders most frequently cited access to finance, with 22% of respondents selecting it as their top concern, further emphasising the importance of an encompassing trade promotion environment. Roads and transport ranked second at 18%, underscoring the persistent weight of transport infrastructure barriers in hampering intra-regional food trade. Other priorities mentioned include safety, ease to cross border procedures, and storage infrastructure (10%); fewer restrictions and taxes (8%); and less inflation (6%). Access to market information, internet and more demand or supply were highlighted by smaller shares of respondents (3%) (Figure 21) (Box 1).

Figure 21.

Food traders' perceived top priority for improving their business



Note: Share of respondents providing each answer to the question *Please list up to three main things that need to get better for your business to do well*, filtered for highest-ranked priority only.

Box 1.

Perspectives from public-private dialogue participants on key constraints to regional food trade

Two ground-truthing public-private dialogues were held in Abidjan (October 2024) and Accra (February 2025), bringing together regional food Small and Medium Enterprises (SMEs), business associations, chambers of commerce, national institutions, governments, and regional organisations to discuss the survey results and gather additional insights into the constraints faced by the regional food trading private sector.

According to participants, the financing barrier is largely rooted in the informal nature of many agrifood businesses. These enterprises often lack the financial documentation, business planning capacity, and credit literacy required to secure loans. Even when financing is available, the terms are often prohibitive—dialogue participants reported average interest rates ranging from 6–10% in the Communauté Financière d'Afrique (CFA) zone and from above 20% per annum in Ghana, with collateral requirements at least 150% of the loan value. Loan durations tend to be short, and repayment schedules are poorly aligned with agricultural cycles. In addition, stringent collateral requirements and high upfront contributions further restrict access, while underperforming guarantee mechanisms provide limited support.

When discussing infrastructure issues, dialogue participants stressed that poor road conditions, limited investment in rail, waterways, and sea freight, and the lack of cold chain infrastructure contribute to high costs, delays, and spoilage—especially for perishable goods. Traders often rely on shared civilian vehicles or inappropriate mixed-goods transportation, such as livestock and horticulture products, due to a shortage of affordable logistical services, while weak air and rail connectivity further restricts market access and mobility. The limited availability of reliable logistics providers compounds these challenges, undermining both regional integration and food security.

Access to reliable market information, including potential regional partners, remains a major barrier for West African food traders, hindering informed decision-making and competitive trade. Information is highly fragmented across multiple uncoordinated platforms, leading to confusion, higher costs, and unreliable data. Beyond prices, traders need detailed insights into products, certifications, logistics, and partner networks. This information is rarely available in an accessible or tailored format—especially for small-scale and informal traders—limiting their participation in regional markets.

Participants also stressed that security and trade restrictions constitute major hinderances to West Africa's food trade. Armed conflict, banditry, and terrorism frequently force the closure of key markets and border hubs, disrupting the flow of goods. Transport routes have become increasingly dangerous, leading to higher costs, delays, and losses from stolen or confiscated goods. Furthermore, sudden border closures—such as Nigeria's 2019 shutdown to curb smuggling—severely disrupt regional supply chains. While intended to protect domestic production, these measures often prove ineffective and undermine decades of progress toward regional economic integration. They also add up to existing constraints at border crossings: lack of harmonised regulatory trade frameworks between countries, border harassment, excessive number of checkpoints, and early closure time of border custom posts.

A regional food trade sector in motion

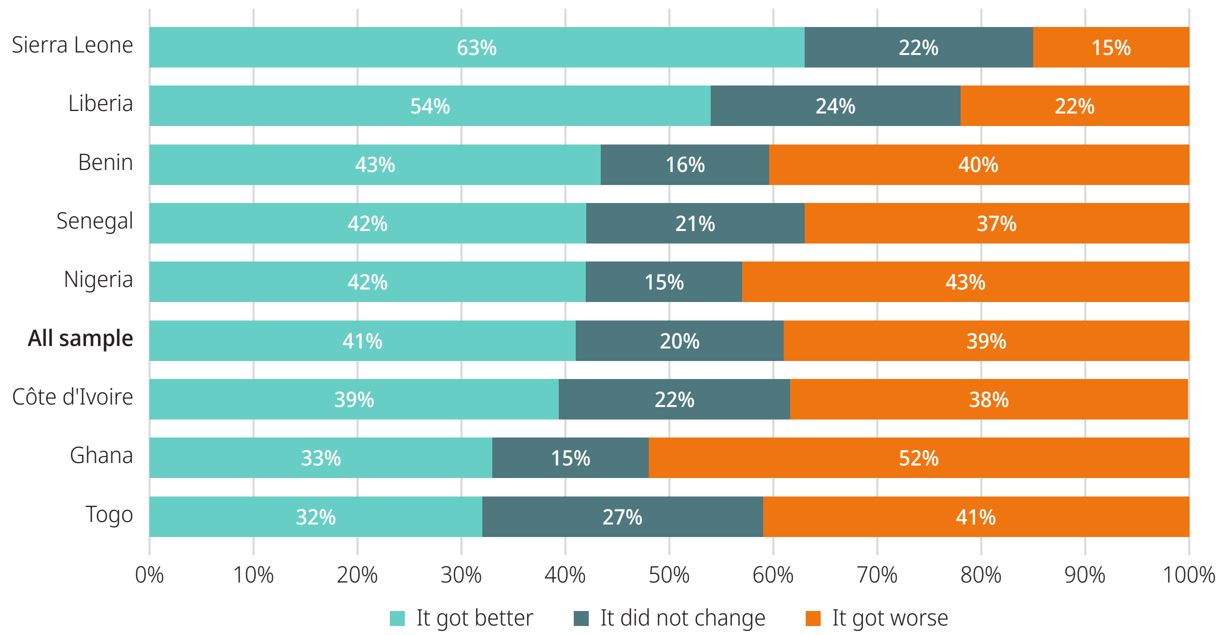
Positive momentum in a challenging environment

Despite the numerous challenges facing intra-regional food traders in West Africa, most respondents reported stable or improved business activities over the past five years. More than 40% of food traders surveyed indicated that their business activities had improved, while an additional 20% said their situation had remained stable. These findings are particularly noteworthy given the broader context of economic volatility, COVID-19 disruptions, and persistent inflationary pressures that have affected the region since 2019.

The survey also reveals strong disparities in the perceived past performance of food traders across countries (Figure 22). Food traders in Sierra Leone (63%) and Liberia (54%) reported the highest levels of improvement in their businesses. In contrast, a significant share of traders in Ghana (52%) and Nigeria (43%) reported that their trading activities had worsened during the same period; 13 percentage points and 4 points above average, respectively. This sentiment could stem from the strongly deteriorating macroeconomic situation in the two countries over the period.

Figure 22.

Food traders' perception of business performance over the past five years, by country

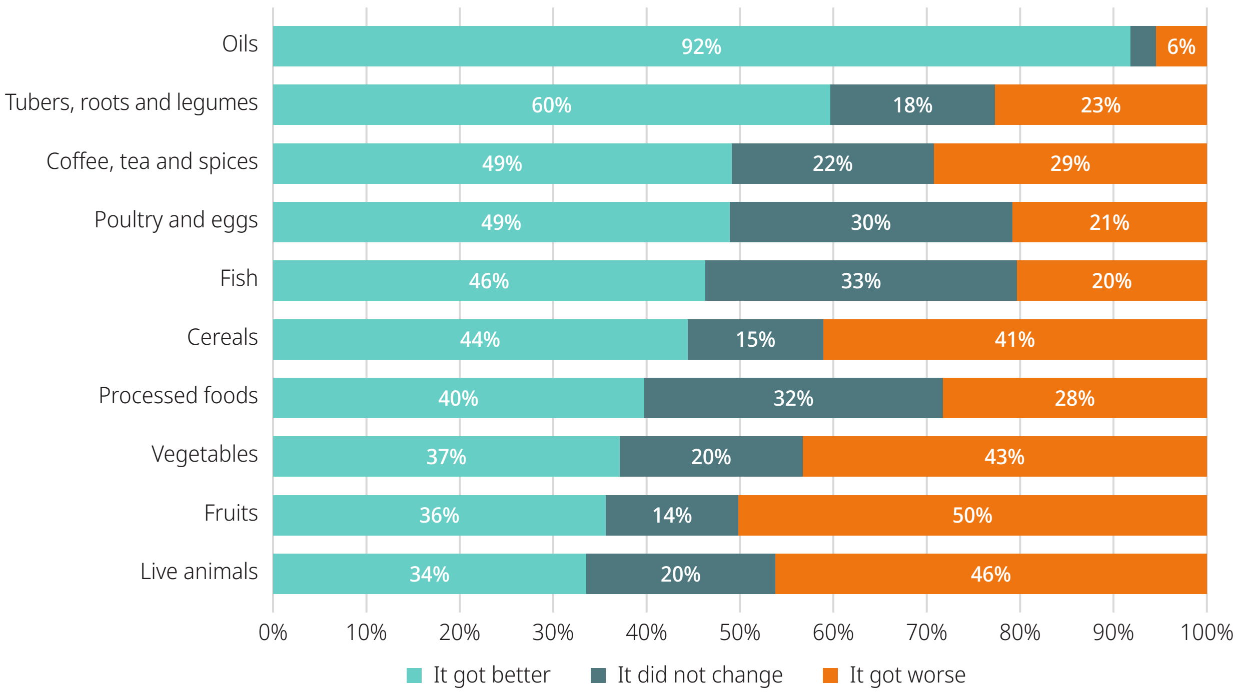


Note: Share of respondents providing each answer to the question *How has your business changed over the last five years?*

Results also differ sharply across food groups (Figure 23). Oils, largely reflecting palm oil trade, stand out as the most dynamic product category, with 92% of surveyed traders reporting improvements and only 6% experiencing a decline.[4] By contrast, traders dealing in perishable goods such as fruits (50% worse off), live animals (46% worse off) and vegetables (43% worse off) were the most likely to report deteriorating business conditions, suggesting particular vulnerability in these sectors. Cereals also performed relatively poorly, with 41% of traders reporting worsening activities. Meanwhile, traders of tubers, roots, legumes, and fish reported more balanced experiences, with around half or more noting improvements despite ongoing challenges.

Figure 23.

Food traders' perception of business performance over the past five years, by food group

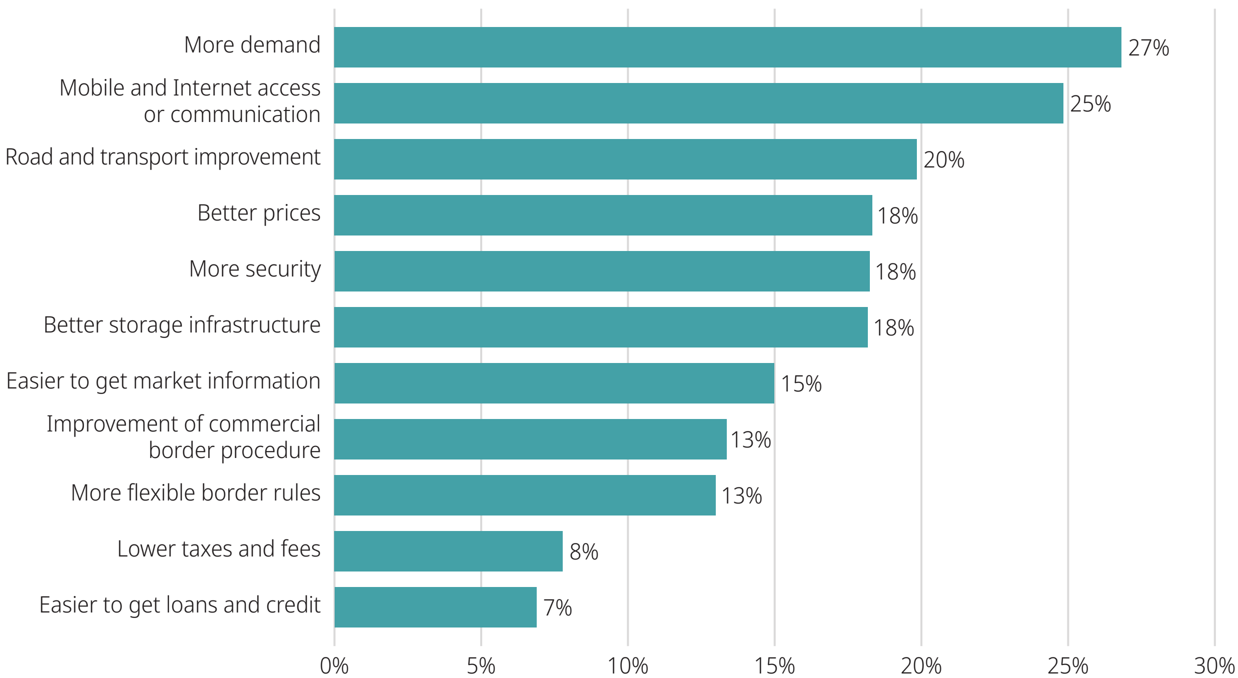


Note: Share of respondents providing each answer to the question *How has your business changed over the last five years?*

When asked about the key factors that have positively impacted their businesses over the past five years, traders pointed to several important areas (Figure 24). The most frequently cited was increased demand (27%), reflecting a fast-growing regional market that is seen as a key driver of intra-regional trade. Enhanced mobile and internet access (25%) ranked second, supporting better communication and easier access to market information. Road and transport infrastructure (20%) came third.

Figure 24.

Food traders' perception of areas that have supported their activities over the past five years



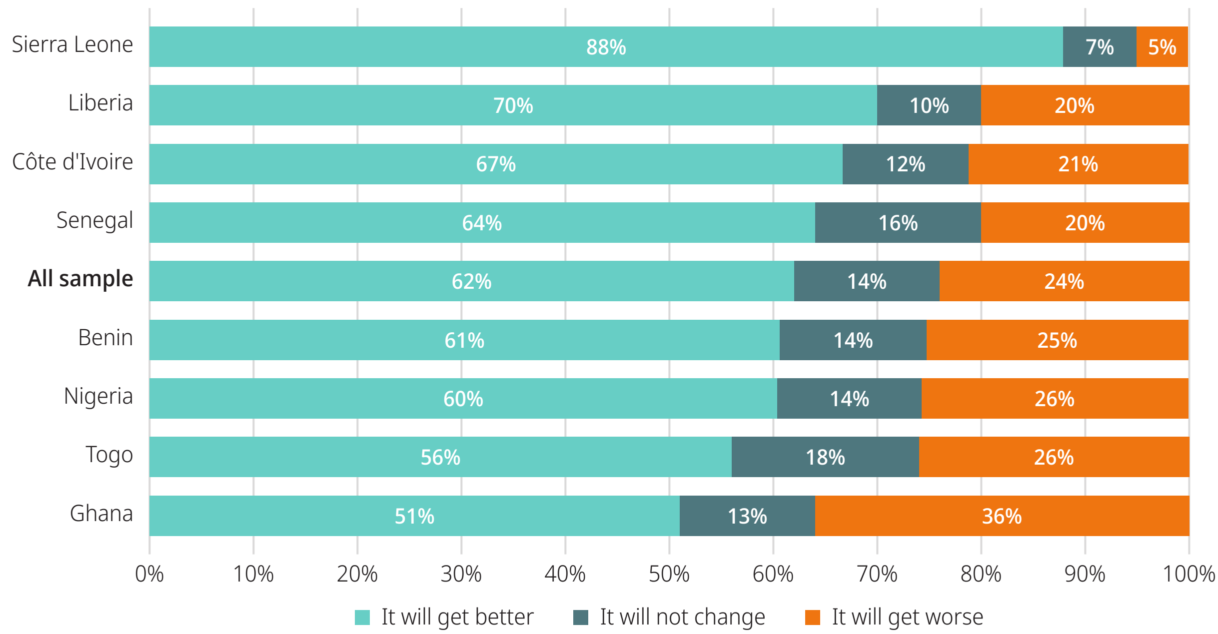
Note: Share of respondents providing each answer to the question *Please list up to three main things that have helped your business in the last five years.* 25% of respondents did not declare any specific improvement. This figure shows answers for those who did.

Optimism for the future of regional food trade

Looking ahead, traders expressed strong optimism: 62% believe their business will improve in the next five years (Figure 25). This positive outlook reflects confidence in the growing potential of the regional food sector and aligns with projections that West Africa's food economy will reach USD 480 billion by 2030, driven by rapid population growth, urbanisation, and shifting demand toward higher-value processed, packaged, and convenience foods (OECD/SWAC, 2025).

Food traders in Sierra Leone (88%), Liberia (70%), and Côte d'Ivoire (67%) are the most optimistic about the next five years, while those in Ghana (51%) express the lowest level of optimism (Figure 25). These outlooks mirror recent business performance: for instance, respondents in Sierra Leone and Liberia reported the strongest results over the past five years and the most confidence looking ahead, whereas Ghanaian traders ranked lowest on both counts.[5]

Figure 25.
Food traders' business outlook for the next five years, by country



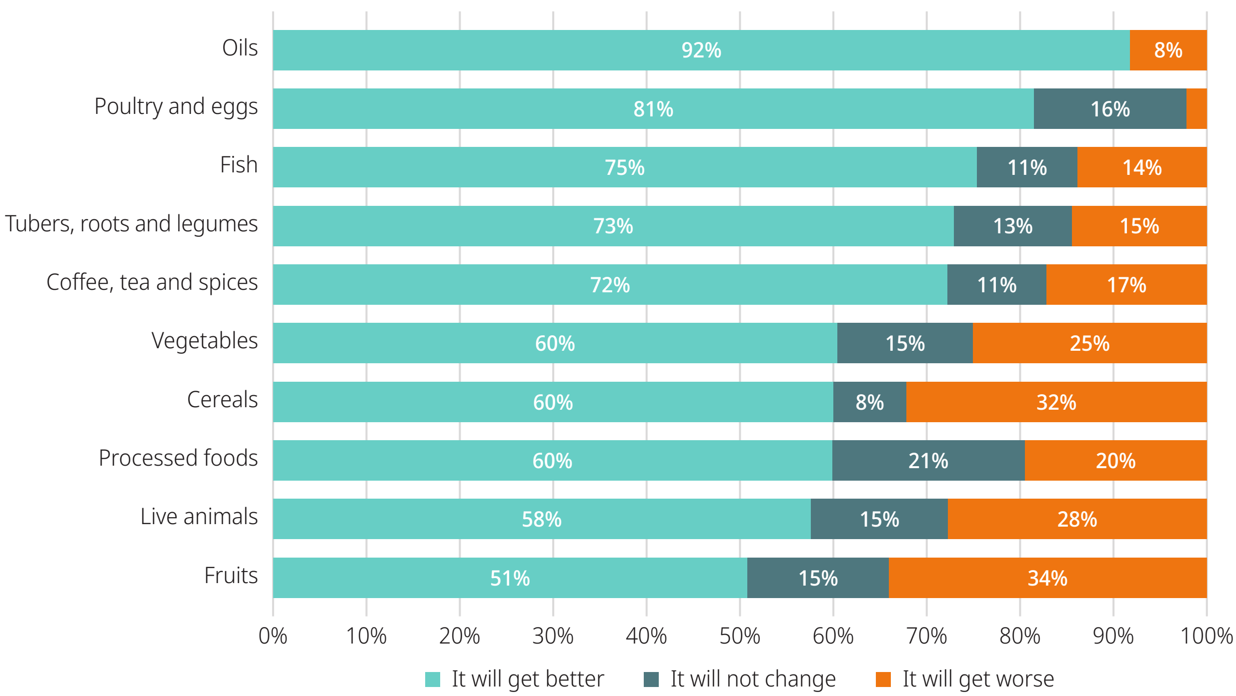
Note: Share of respondents providing each answer to the question *Over the next five years, what do you expect your business to do?*

At the food group level, traders' expectations for the next five years also reveal important differences (Figure 26). Oils, mostly reflecting palm oil, stand out as the most dynamic group, with 92% of respondents anticipating improvements, a similar pattern to their strong past performance.[6] Poultry, eggs[7] and fish show comparable continuity, with more than three-quarters of traders expecting better prospects, reflecting the positive trend they reported for recent years.

By contrast, cereals, fruits, and live animals, among the weakest performers over the past five years, also concentrate some of the most pessimistic outlooks, with 32%, 34%, and 28% of traders respectively expecting deterioration. Vegetables and processed foods present a more mixed picture, with most respondents foreseeing improvements but notable minorities anticipating worsening conditions. These results suggest a strong alignment between past performance and forward-looking sentiment: several food groups that proved dynamic in recent years are expected to continue thriving, while the opposite stands true for groups that had relatively poor performance.

Figure 26.

Food traders' business outlook for the next five years, by food group



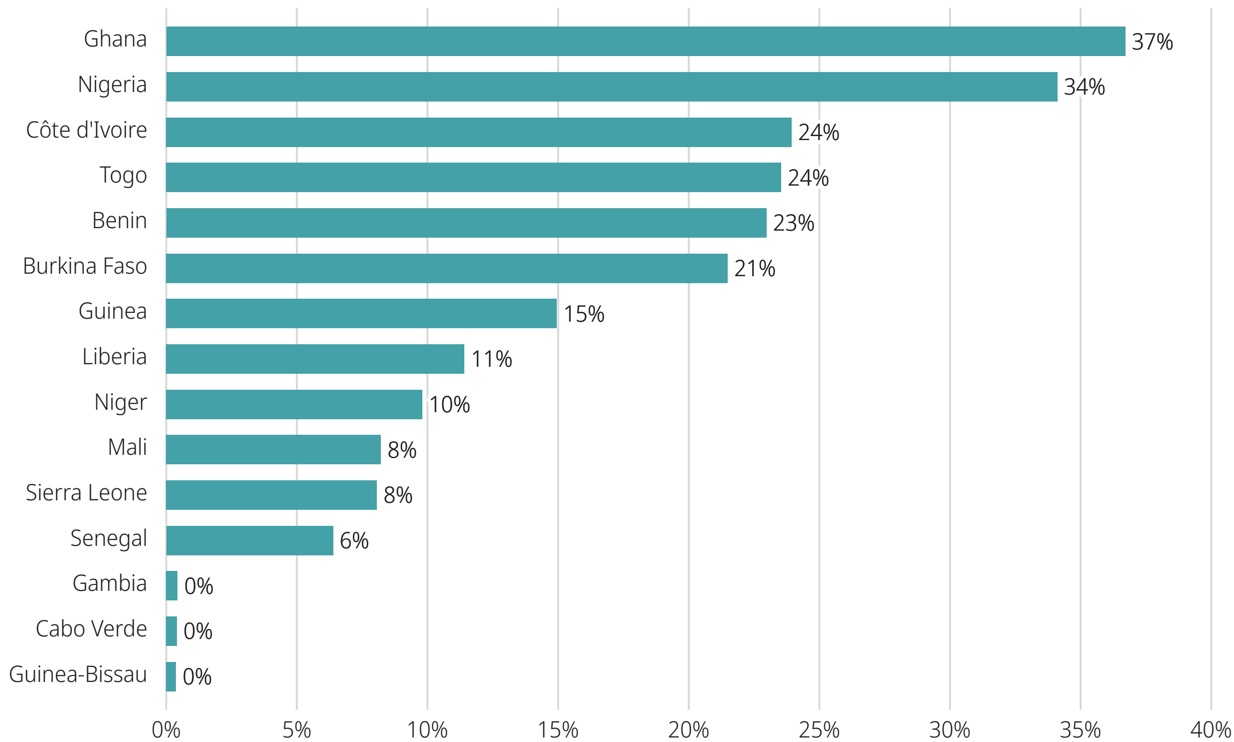
Note: Share of respondents providing each answer to the question *Over the next five years, what do you expect your business to do?*

Promising regional food markets and products

When asked which three countries they think will see the most food business growth in the region, respondents identified Ghana (37%), Nigeria (34%) and Côte d'Ivoire (24%) as the countries with the greatest potential for food business growth in the next five years (Figure 27). These countries account for 66% of the regional population (OECD/SWAC, 2025) and all three have large urban centres, diversified food demand profiles, and the region's highest GDP per capita growth rates (World Bank, 2025). These characteristics make them likely engines of regional food demand growth in the coming years.

Moreover, Côte d'Ivoire, Ghana and Nigeria are expected to strengthen their roles as hubs in the regional food economy, supported by the expansion of the Abidjan-Lagos corridor, which is enhancing transport connectivity and market access along one of West Africa's most important economic axes (Kunaka et al., 2025). Traders' perceptions align with these broader structural trends, reflecting their confidence in the potential of these key markets.

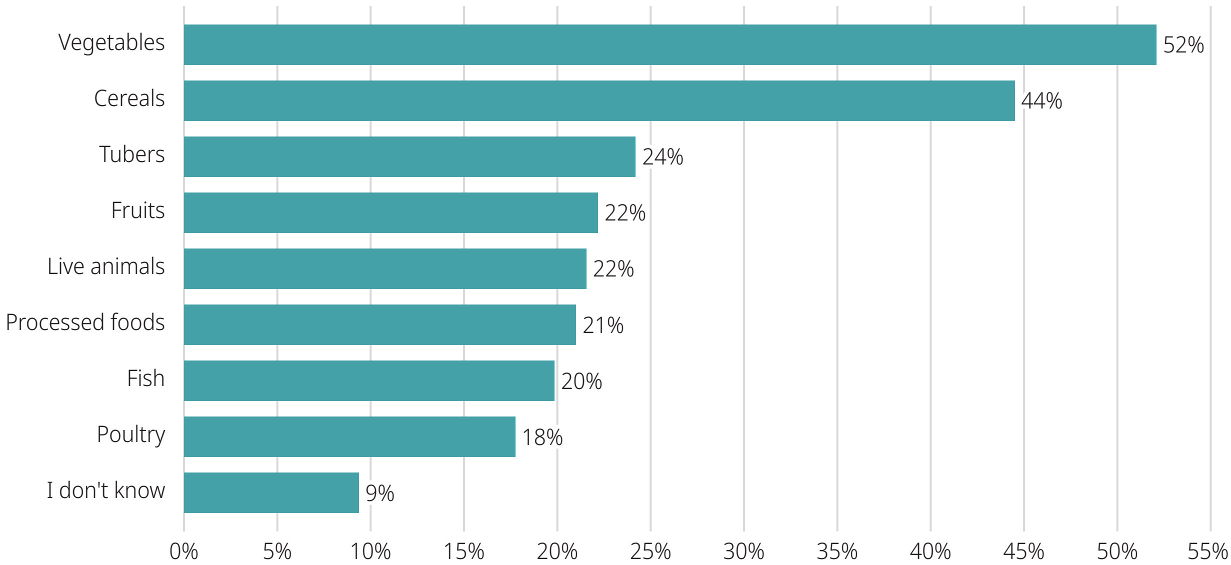
Figure 27.
Countries where food traders perceive the highest potential for food sector growth



Note: Share of respondents providing each answer to the question *Over the next five years, which three countries do you think will see the most food business growth in the region?*

When asked which food groups hold the greatest promise for regional trade in the coming years, traders most frequently pointed to vegetables (52%) and cereals (45%), identifying them as the "food groups of the future" (Figure 28).[8] Tubers (24%), fruits (22%), live animals (22%), and processed foods (21%) were also cited by around one-fifth to one-quarter of respondents, while fish (20%) and poultry (18%) were less commonly mentioned.

Figure 28.
Food groups where traders perceive the greatest potential for regional trade growth



Note: Share of respondents providing each answer to the question *Over the next five years, which three food products do you think will see the most food business growth in the region?*, with answers aggregated by food group.

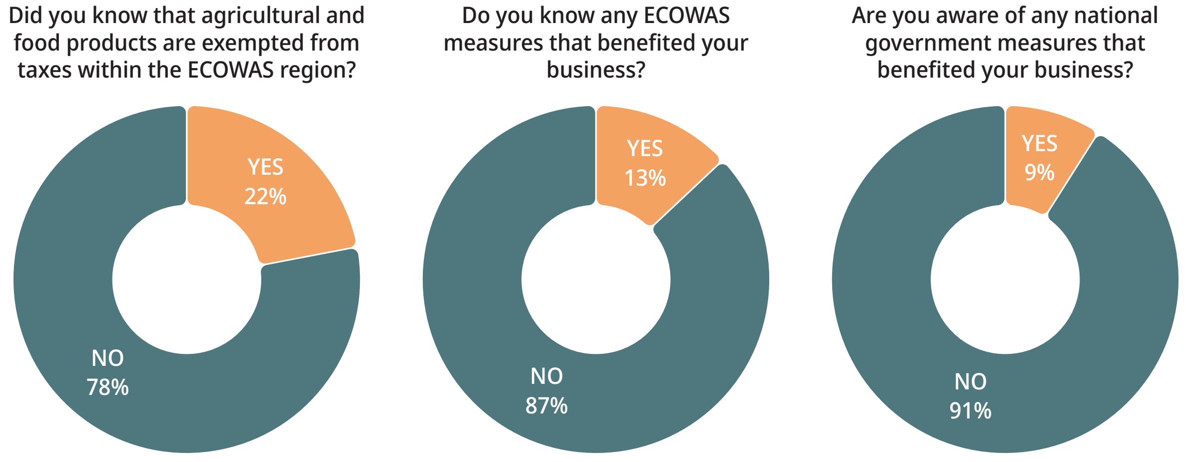
Traders perceive limited support from ECOWAS and national governments

Low awareness of ECOWAS and national government support among traders

The survey revealed both limited awareness and low satisfaction with the role of national governments and ECOWAS in supporting regional food trade. Nearly 80% of respondents reported being unaware of the border tax exemption for agricultural and food products under the ECOWAS Trade Liberalisation Scheme (ETLS), and 87% stated they had never benefited from any ECOWAS initiative (Figure 29). Among the 13% who did recognise at least one positive measure, the most frequently mentioned were the free movement of goods and people (52%) and trade tax exemptions (19%) (Figure 30).

Figure 29.

Food traders' awareness of ECOWAS and national government measures in support of regional food trade



This lack of awareness was not limited to ECOWAS: an even higher share, 91% of respondents, said they were unaware of any national government measure that had benefitted their business. Among the 9% who mentioned beneficial measures from national governments, the most frequently cited ones included anti-corruption measures (28%), improvements in road infrastructure (26%), and enhanced security (23%).

Respondents' awareness of ECOWAS and national government measures to support regional trade varies widely across countries. In Ghana, one-third of traders (33.5%) reported being aware of the border tax exemption, followed by those of Côte d'Ivoire (27.8%) and Benin (25.9%). Awareness was far lower in Liberia (8.5%) and Sierra Leone (7.3%), pointing to significant information gaps in some markets.

Figure 30.

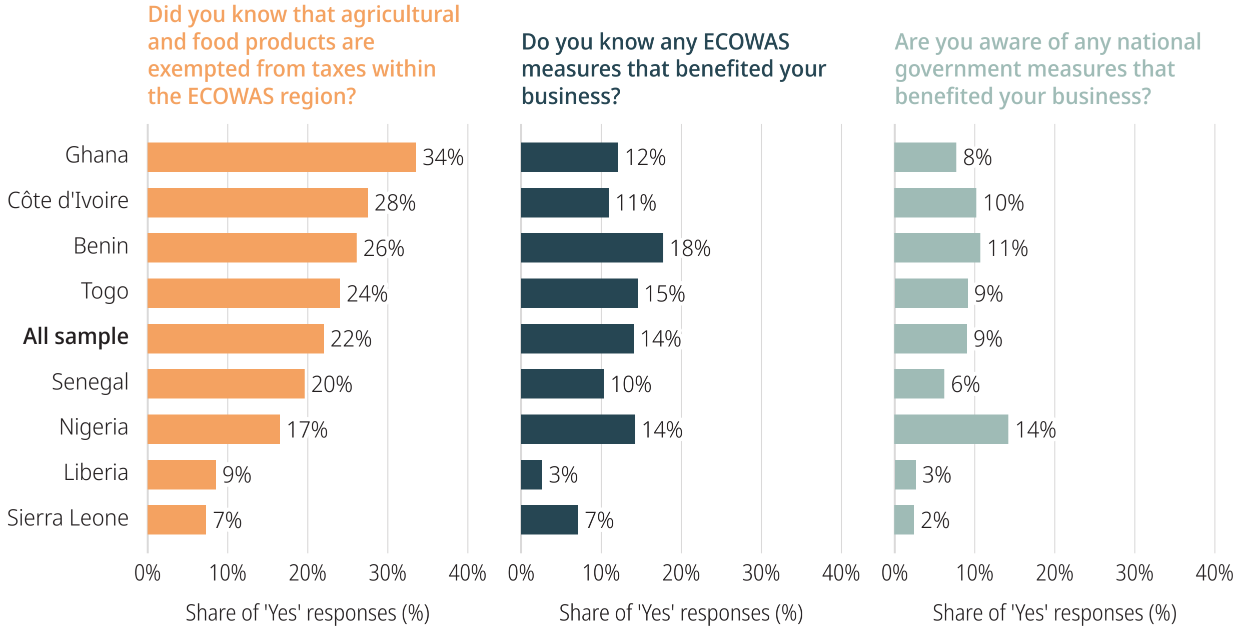
ECOWAS measures recognised by food traders as beneficial

Note: Distribution of answers for the 13% of survey respondents who responded positively to the question "*Do you know any ECOWAS measure that benefitted your business?*", grouped by category.

When asked about ECOWAS measures that had directly benefited their businesses, traders in Benin (17.8%), Nigeria (14.3%), and Togo (14.5%) were the most likely to respond positively. At the national level, Nigeria (14.3%) and Benin (10.6%) stood out as the countries where the largest share of respondents reported benefiting from government actions (Figure 31).

Figure 31.

Food traders' awareness of ECOWAS and national government measures in support of regional food trade, by country



Dissatisfaction with trade promotion efforts

Overall, the majority of traders give low marks to both ECOWAS and their national governments in their helpfulness in helping their business. Average ratings cluster between 2.2 and 2.7 across countries, with ECOWAS scoring 2.4 and national governments 2.3 on a five-point scale (Figure 32).

Figure 32.
Food traders' evaluation of ECOWAS and governments support

Note: Share of respondents providing each grade to the question *How would you rate the role of ECOWAS in helping your business, from not helpful at all (1) to extremely helpful (5)?* and *How would you rate the role of your national government in helping your business, from not helpful at all (1) to extremely helpful (5)?*

The majority of respondents rated ECOWAS and their governments' support to their business as 1 or 2 out of 5 ("not helpful at all" and one grade above this), while 15% (ECOWAS) and 17% (government), evaluated them as 4 or 5 out of 5 ("extremely helpful" or one grade lower). These results highlight widespread dissatisfaction with institutions at both regional and national levels, suggesting that traders see limited support for their activities from either. Sierra Leone stands out with the highest average score (2.7, ECOWAS; 3.1, Government), while Ghana records the lowest (2.2, ECOWAS; 2.1, Government) (Figure 33).

Interestingly, there is a link between traders' evaluations scores and their perceptions of past performance and future outlook. Sierra Leone, which gave the most favourable ratings to both ECOWAS and national governments as trade supportive institutions, is also where traders expressed the most positive perceptions of past performance and future prospects for regional food trade. Conversely, Ghanaian respondents, who rated both ECOWAS and their government most negatively, also reported the least favourable views on trade performance and opportunities.

Figure 33.
Food traders' evaluation of ECOWAS and government's support, by country

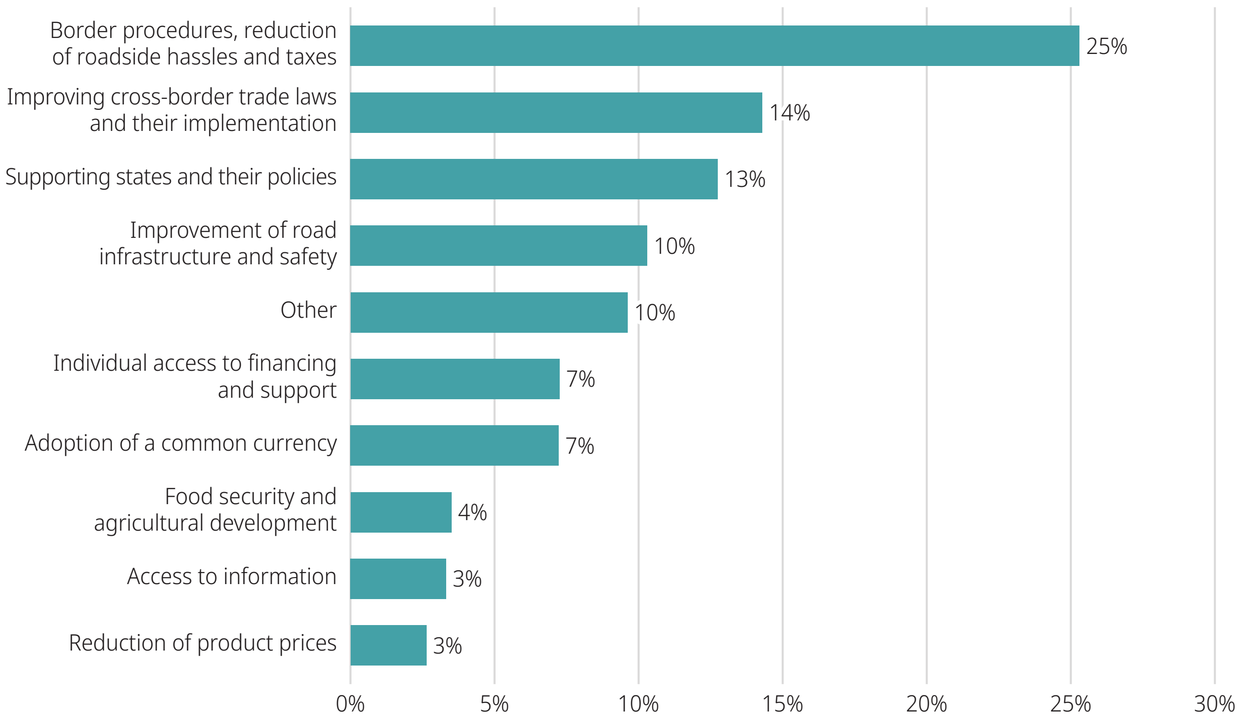
Note: Share of respondents providing each grade to the question *How would you rate the role of ECOWAS in helping your business, from not helpful at all (1) to extremely helpful (5)?* and *How would you rate the role of your national government in helping your business, from not helpful at all (1) to extremely helpful (5)?*, by country.

Traders' views on priorities for ECOWAS and national governments are aligned with institutional mandates

Food traders' policy support expectations vis-à-vis ECOWAS and national governments are aligned with these institutions' mandates. Traders believe ECOWAS should be a driver of policy and regulatory reform, with a focus on improving border procedures, reducing road harassment and taxes (25%), ensuring law enforcement (14%), and supporting member states in implementing trade policies (13%) (Figure 34). In contrast, they see national governments as responsible for more operational support, with priorities such as improving access to finance

Figure 34.

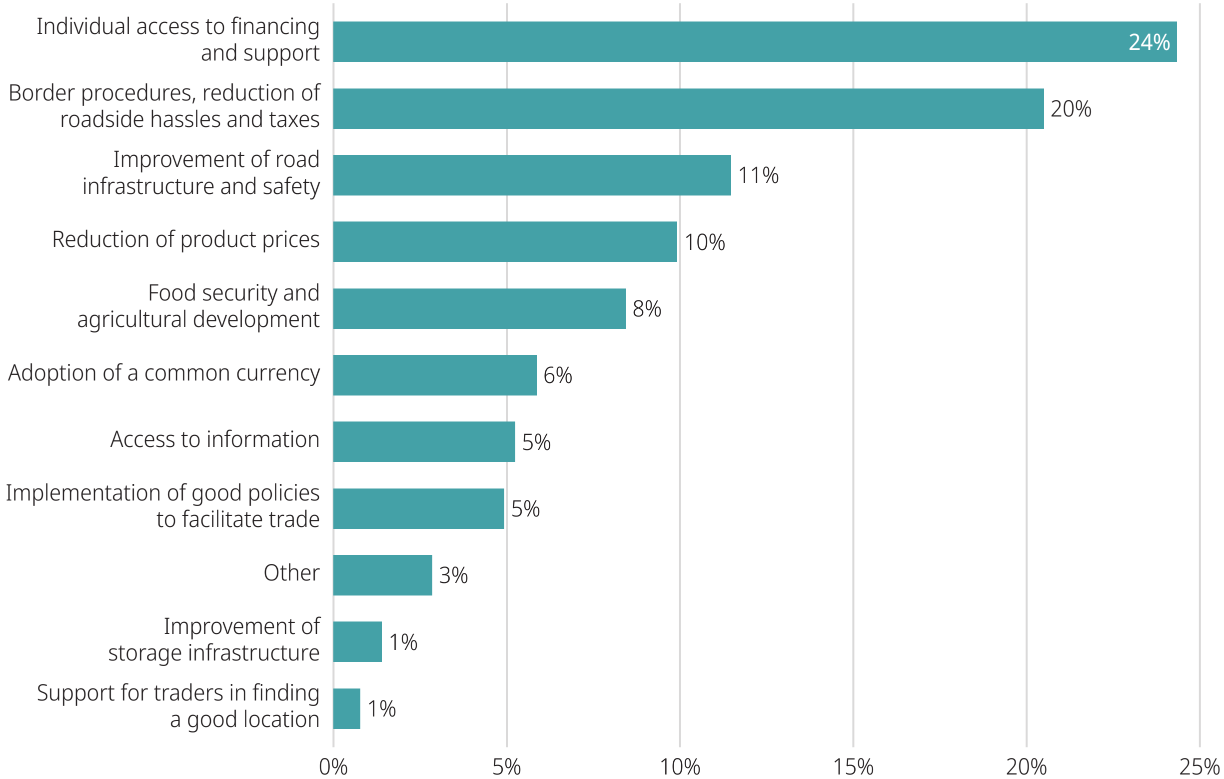
Food traders' views on ECOWAS' top priorities for improving regional food trade



Note: Share of respondents providing each answer to the question *What should be the biggest priority for ECOWAS to improve trade of food in the region?* Responses were open-ended and categorised afterwards.

(24%), streamlining border procedures (20%), and upgrading road infrastructure (11%) (Figure 35).

Figure 35.
Food traders' views on governments' top priorities for improving regional food trade



Note: Share of respondents providing each answer to the question *What should be the biggest priority for your national government to improve trade of food in the region?* Responses were open-ended and categorised afterwards.

Box 2.

Traders' perceptions on key priorities for ECOWAS, national governments and private sector from the public-private dialogues

Participants in the public-private dialogues held in Abidjan and Accra also shared their perceptions of key priorities for ECOWAS, national governments, and the private sector to enhance intra-regional food trade in West Africa.

A priority frequently raised was the need to bolster regional food transport capacities. Participants stressed the importance of strategic investment, policy coordination, and public-private partnerships. They pointed to the potential role of regional financial institutions like Afreximbank and EBID in de-risking infrastructure projects to attract private investment—including smaller-scale initiatives such as jetties, railways, or river ports—to unlock trade corridors. Dialogue participants also stressed the value of a cohesive ECOWAS-wide transport strategy, leveraging each country's strengths (e.g., Liberia's ports or Ghana's rails) to optimise regional infrastructure. They highlighted the high costs and limited availability of air connectivity, noting that reducing taxes on regional air transport and investing in airports and airlines could make air freight more affordable, especially for high-value goods. In their view, specialised services such as cold chains depend, first and foremost, on reliable basic infrastructure.

Participants further underlined the importance of improving market information for food trade in West Africa. They recommended the creation of a centralised digital platform to aggregate trade rules, regulations, procedures, and sector data in one place. Building on tools like the ECOWAS matchmaking platform, they suggested that such a platform include user-friendly features (payments, logistics, actor profiles, product filters, real-time capacity) and tailored pathways for farmers, traders, processors, and transporters. To ensure credibility, inclusivity, and sustainability, participants proposed that it be managed by ECOWAS together with national governments. They also called for complementary offline tools (signposts, posters, simplified multilingual guides) to reach traders with limited digital access, fostering transparency and reducing compliance barriers.

Finally, participants stressed the need for a multi-faceted strategy to overcome financing barriers for West African agribusinesses. They highlighted the importance of business development and training services to strengthen entrepreneurial skills, the design of financial products tailored to agricultural realities, and the expansion of guarantee mechanisms to de-risk lending. Specific suggestions included strengthening and expanding national guarantee funds (e.g., Benin's *Fonds National De Développement Agricole*), promoting public-private partnerships to de-risk lending, and establishing a regional guarantee fund through ECOWAS and EBID. They also pointed to opportunities to diversify funding sources by exploring crowdfunding and targeted grants to support inclusive growth.

IMPROVING THE FOOD TRADE ENVIRONMENT IN WEST AFRICA

From trade facilitation to trade promotion: Connecting agrifood companies to the regional markets

The survey findings and the two public–private dialogues conducted for this report highlight key priorities to unlock intra-regional food trade in West Africa. While traders are motivated by market opportunities and are optimistic of its potential, they remain constrained in their ability to seize them fully.

On one hand, they face persistent border barriers such as non-tariff measures, export bans, and inconsistent regulations. On the other, they lack an enabling policy environment, including access to finance, reliable regional market intelligence, and transparent regulatory information.

This calls for governments and regional organisations to move beyond border facilitation and adopt a more proactive approach to regional food trade promotion. Strengthening cross-cutting enablers—such as transport infrastructure, access to credit, and timely market data—is essential.

Equally important is closing the awareness gap: many traders remain unaware of ECOWAS trade rules and exemptions. This reflects the opacity of regional trade regulations and highlights the need for targeted communication of these rules through trusted networks and platforms. The lack of awareness also stems from the fragmented and inconsistent implementation of the rules across borders within the ECOWAS space. The African Continental Free Trade Agreement (AfCFTA), notably, presents a renewed opportunity for national governments and ECOWAS to strengthen enforcement and standardise regional trade regulations.

Fostering evidence-informed public-private dialogues at both national and regional levels

The survey and public-private dialogues confirm strong private sector demand for structured and evidence-based engagement on trade issues with public institutions (Box 3). Traders highlighted the value of such platforms to voice concerns, share experiences, and co-develop solutions to accelerate regional food trade grounded in data on the challenges they are facing.

Despite this demand, traders noted that opportunities for evidence-based dialogue remain too rare. Institutionalising these exchanges, through regular data collection on traders' perceptions and outlooks, regional-level consultations with the private sector, and mechanisms such as digital platforms or dedicated public–private taskforces, could provide a stronger foundation for reform.

Box 3.

Key messages from the public-private dialogues on strengthening intra-regional food trade

The workshops identified four major priorities to unlock intra-regional food trade in West Africa:

- **Trade facilitation:** harmonised documents, training of border officials, stronger sanctions against corruption, fewer checkpoints, longer border post opening hours, and simplified procedures for small traders.
- **Access to finance:** building medium and small enterprise capacity, developing tailored agribusiness finance products, and establishing a regional credit guarantee fund.
- **Infrastructure:** investment not only in roads but also in railways, waterways, air routes, and productive facilities such as energy, warehouses, and special economic zones, alongside measures to address insecurity and attract transport providers.
- **Access to market information:** national-level and a centralised ECOWAS digital platform on regional food market opportunities in the region with better visibility, and tailored tools for different actors.

Maximising opportunities under continental agendas to foster a business-friendly food trade environment in West Africa

Intra-regional food trade already represents a sizeable and dynamic sector in West Africa. Several major food traders conduct transactions worth tens of thousands of dollars, or even more, each month, successfully navigating the regional trade environment despite persistent challenges. This resilience underscores the vast potential of the sector to accelerate economic growth, strengthen food and nutrition security, and deepen regional integration—provided that the enabling environment for food trade is improved.

In this context, dialogues with food traders highlighted the potential of continental initiatives such as the AfCFTA and the African Union's Comprehensive Africa Agriculture Development Programme's Kampala Declaration (CAADP) on agrifood systems, which aims to triple intra-regional food trade by 2035. However, traders generally viewed these opportunities as underutilised. While the AfCFTA offers prospects for market expansion, regulatory harmonisation, and cost reduction, traders reported seeing little tangible impact on their activities so far.

To unlock this potential, governments and regional organisations should leverage these continental frameworks to drive concrete, trade-promoting reforms. Key priorities include simplifying border procedures, improving the quality of public services for exporters, and expanding access to finance for regional food SMEs. Equally important is enhancing traders' understanding of AfCFTA provisions—such as rules of origin and tariff preferences—to ensure they can fully benefit from regional integration.

NOTES

1. WACTAF is a regional association created in 2019 in Lomé with the technical support of the Economic Community of ECOWAS and CILSS. It aims to promote intra-regional trade in agrifood products in the West African and Sahelian region by facilitating frameworks for dialogue and governance between private and public actors.

2. The gender participation gap measures the difference between the share of respondents being women and the share of respondents being men for a given product group.

3. This is 13 percentage points above the regional average.

4. It should be noted that oils traders represent a very small subset of the sample, with 36 traders (1%).

5. The questionnaire design did not place the questions on recent business performance and future outlook consecutively. This reduces response-order effects, where answers to one question may directly influence answers to the next.

6. It should be noted that oils traders represent a very small subset of the sample, with 36 traders (1%).

7. It should be noted that poultry and egg traders represent a very small subset of the sample, with 43 traders (1%).

8. Notably, this optimism extends beyond traders who currently deal in these products. For example, only 12% of respondents who identified cereals as promising trade cereals themselves, and just 3% of those who see poultry as a high-growth product are currently poultry traders. This suggests that traders are looking beyond their current portfolios and recognising broader market trends and emerging opportunities in the regional food economy.

REFERENCES

Allen, T. (2017), "The Cost of High Food Prices in West Africa", *West African Papers*, No. 8, OECD Publishing, Paris, https://doi.org/10.1787/c2db143f-en.

Kunaka, C. et al. (2025), *Transport Connectivity for Food Security in Africa: Strengthening Supply Chains*, Washington, DC: World Bank, https://doi.org/10.1596/978-1-4648-2231-5.

OECD/SWAC (2025), *Africapolis (database)*, https://africapolis.org/.

OECD/SWAC (2025), *Intra-regional Food Trade in West Africa: New Evidence, New Perspectives*, West African Studies, OECD Publishing, Paris, https://doi.org/10.1787/3f5fd54a-en.

OECD/SWAC (2019), *Women and Trade Networks in West Africa*, West African Studies, OECD Publishing, Paris, https://doi.org/10.1787/7d67b61d-en.

OECD/SWAC (forthcoming), *An Atlas of urban and rural transformations in Africa*, OECD Publishing, Paris.

OECD et al. (2025), *Production Transformation Policy Review of Togo (Abridged version): Towards Shared Propserity*, OECD Development Pathways, OECD Publishing, Paris, https://doi.org/10.1787/8ab3dbfd-en.

World Bank (2025), *World Development Indicators*, https://data.worldbank.org/indicator/NY.GDP.PCAP.CD.

WEST AFRICAN PAPERS

THE WEST AFRICAN FOOD TRADE ENVIRONMENT: PRIVATE SECTOR PERCEPTIONS OF BARRIERS, OPPORTUNITIES AND THE FUTURE

This paper provides new evidence on private sector perceptions on intra-regional food trade in West Africa, drawing on a survey of more than 3 200 food traders operating across 32 markets in eight countries. The dataset allows for a differentiated analysis by business size, gender, country and product specialisation. The findings reveal an extensive, economically significant, and market-driven sector, though it remains predominantly informal. While over 80% of traders are unregistered, the median trader has an average monthly turnover of USD 13 289 and employs five workers. Traders respond strongly to market signals, such as price differentials and demand patterns, and more than half (56%) trade with non-neighbouring countries. Overall, 62% of traders report a positive business outlook for the next five years, with variations across countries and food products. The main constraints identified extend beyond border procedures and include limited access to finance, insecurity, and inadequate transport and market infrastructure. This analysis points to a strong but under-leveraged market dynamic and underscores the need for better-adapted policies to unlock the potential of intra-regional food trade.