Against the background of major worldwide trade pattern disruption due to the coronavirus pandemic, the *Africa Agriculture Trade Monitor 2020* explores the most salient trends in regional and global trade and Africa's key policy opportunities and barriers.

Using a database that corrects typical trade flow errors, the report offers the most robust analysis of agricultural trade flows and compositions, comparative advantages, and tariff and nontariff trade protection, and identifies opportunities to develop stronger regional value chains and capitalize on the recently ratified African Continental Free Trade Area. This year's report includes special coverage of informal trade and initiatives to measure its widespread impact across Africa, as well as a regional focus on the Southern African Development Community (SADC).

DESPITE PRODUCING 10 PERCENT OF THE WORLD'S AGRICULTURAL GDP, AFRICA ONLY ACCOUNTS FOR 4 PERCENT OF GLOBAL AGRICULTURAL EXPORTS. Nontariff measures such as customs formalities and sanitary and phytosanitary restrictions pose the primary barriers to Africa's competitiveness, along with poor transportation, infrastructure, and unfair competition due to domestic support policies in Brazil, China, the European Union (EU), the United States, and other countries. With rising demand from its growing population, the African agricultural trade deficit persists, particularly in the staple cereals, sugar, and vegetable oils value chains. Few African products outperform in global markets, namely unprocessed products like sesamum seeds and tomatoes, and some semi-processed products like broths and sucrose. Nonetheless, African global exports have expanded since 2005, especially to emerging economies, while export growth to its longstanding EU market continues.

INTRA-AFRICAN AGRICULTURAL EXPORTS GREW FASTER THAN GLOBAL EXPORTS FROM 2008–2018. Intracontinental trade offers compelling opportunities for African trade growth if regional economic communities (RECs) can minimize tariff and nontariff barriers. Tariffs between RECs can be as high as 40 percent (see Table 1), and nontariff measures pose an additional 21 percent average charge on trade between RECs. For these reasons, along with other regional factors (e.g., language, proximity), most intra-African trade occurs within RECs, with the greatest recent growth among SADC and COMESA member countries (see Figure 1).

TRADE INTERESTS WITHIN AFRICA ARE NOT NECESSARILY COMPLEMENTARY, since countries primarily export unprocessed nonfood products, but import processed food products. Yet these trends are shifting, and intracontinental trade flows are responding well to emerging trends in domestic food demand — the share of traditional export products is contracting while emerging cash products and processed products like broths and prepared foods are expanding. Growth in demand for processed foods accompanies demographic shifts, urban expansion, and changing lifestyles and habits in rural areas. But despite their added value benefits, some processed foods raise health concerns; shifting diets in many emerging economies have led to spikes in diabetes, diet-related disease, and the double-burden of undernutrition and obesity.

EXPORT DIVERSIFICATION AWAY FROM PRIMARY COMMODITIES IS KEY TO INTRA-AFRICAN TRADE EXPANSION, as exemplified by the case study of the Southern Africa region (SADC). Only a few products dominate intra-SADC trade, but intraregional trade could be intensified by building on localized comparative