

CONCEPT NOTE

Agriculture Pillar Roundtable

Building Productive, Sustainable and Resilient Agri-Food Systems in Africa: Strengthening Partnerships

*Tuesday, 12 May 2026 | 60
minutes*

1. BACKGROUND

The Africa Forward Summit 2026 — themed "Partnerships for Innovation and Growth" — will convene in Nairobi, Kenya on 11–12 May 2026, co-hosted by Presidents Emmanuel Macron and William Ruto. Jointly announced at the United Nations General Assembly in September 2025, the Summit marks a recalibration of Africa-France relations — moving beyond traditional donor-recipient dynamics toward a framework of mutual respect, shared prosperity, and strategic partnership. This is the first time the Summit is hosted in East Africa.

With more than 1.5 billion inhabitants — 60% of whom are under 25 — and a population expected to reach 2.5 billion by 2050, Africa embodies an enormous human and economic potential. Agriculture accounts for between 30 and 50% of the GDP of most African countries and employs on average nearly 60% of the active population. The continent's agricultural potential is immense, but must overcome structural challenges: access to finance and advisory services, cold-chain and logistics infrastructure, farmer training and professionalisation, soil health, and support for sustainable and climate-resilient production methods.

The African continent adopted the Kampala Declaration in January 2025, which together with the Comprehensive Africa Agriculture Development Programme (CAADP) constitutes a framework of actions and a roadmap for sustainable, resilient, and employment- and income-generating productive African food systems. This Concept Note sets out the rationale, objectives, and expected outcomes for the Agriculture Pillar roundtable.

2. CONTEXT AND CHALLENGE

Despite holding over 60% of the world's uncultivated arable land, Africa spends up to USD 115 billion annually on food imports — much of it processed commodities that Africa grows but does not yet transform. This structural imbalance — exporting raw commodities and importing processed goods — represents both a profound economic vulnerability and an enormous untapped opportunity.

Low processing capacity, fragmented regional markets, weak cold-chain infrastructure, underinvestment in seed systems, soil health, and quality assurance prevent African producers from capturing value along their own supply chains. Annual agricultural investment needs are estimated at USD 100 billion per year, with significant financing gaps in agro-processing, cold-chain logistics, risk instruments for smallholder-linked value chains, and seed systems.

Intra-African agricultural trade — particularly in livestock, dairy, cereals, and processed food products — remains far below its potential. African countries continue to import goods from outside the continent that neighbouring countries produce. Climate change compounds this challenge, accelerating land degradation and threatening the viability of rain-fed systems on which the majority of African smallholders depend. Intensifying agricultural production must therefore be accompanied by sustainable, climate-resilient, and nutrition-sensitive farming methods.

The Africa-France partnership — grounded in France's expertise in agro-technology, research institutions (CIRAD, INRAE, IRD), and development finance instruments (AFD, Proparco, BPI France) — offers a concrete pathway to unlock this potential. The AfCFTA market integration framework provides a further accelerant. What is needed now is the commercial architecture: named value chains, structured partnerships, and committed finance with clear timelines.

3. STRATEGIC RATIONALE

This roundtable is co-designed by Africa and France as equals, grounded in the recognition that transforming African agri-food systems is not only a development priority but a strategic economic imperative — for African industrialisation, for the nutrition and livelihoods of women and youth, and for the long-term credibility of the Africa-France partnership itself.

The session builds directly on:

- The Kampala CAADP Declaration and Strategy 2026-2035 — Africa's continental framework for agri-food systems transformation, anchored in investment benchmarks, nutrition outcomes, and accountability structures.
- The 2024 Nairobi Declaration on Africa Fertilizer and Soil Health — committing to a 10-year action plan to rebuild soil fertility, triple domestic fertilizer production by 2034, and ensure 70% of smallholder farmers access tailored agronomic recommendations — underpinning sustainable farming across all value chains.
- The AfCFTA agricultural trade agenda — providing the regional market integration framework within which Africa-France value chain partnerships can operate at continental scale.
- France's research-training-innovation-development continuum — CIRAD, INRAE, IRD, and the International Innovation Hub (TSARA initiative) represent a distinctive French contribution to African agricultural transformation that goes beyond finance to capacity and knowledge transfer.
- France's own strategic interest in a rebalanced partnership — evidenced by the French co-organisers' identification of value chain structuring, commercial partnerships, and blended finance as their priority theme for the Summit's agricultural pillar.

The roundtable operationalises these frameworks by moving from policy commitments to named partnerships, capital, and implementation timelines, with concrete announcements expected from participating governments, DFIs, and private sector actors.

4. PRIORITY VALUE CHAINS

Four value chain clusters have been identified as the focus of structured discussion, selected for their pan-African potential, existing Africa-France partner engagement, demonstrated commercial viability, financing readiness, and nutrition and sustainability outcomes:

4.1 Cereals, Oilseeds, Animal Feed & Dairy

One of the largest drivers of Africa's food import bill, and a critical pathway to food and nutrition security. Local processing and milling — demonstrated by SEDIMA Group (Senegal) and Export Trading Group across East Africa — show the model at scale. Animal feed production underpins livestock productivity and dairy value chains across the continent, creating a high-multiplier investment opportunity. The ECOWAS regional "Offensive Lait" strategy for local milk value chains in West Africa — supported by French AFD financing (PAOLAO project) — is a live model with potential for AfDB co-financing and continental replication. French agri-processing cooperatives InVivo/Soufflet Group and Avril Group are natural commercial partners. Dairy integration directly improves nutrition outcomes for women and children.

Investment focus: milling and processing infrastructure; grain storage; feed formulation; dairy processing and cold chain; quality assurance; and regional trade facilitation under AfCFTA. Country anchors: Ethiopia, South Africa, Angola (cereals); Cameroon, Togo, Rwanda (oil-protein); Senegal, West Africa (dairy/livestock).

4.2 Horticulture & Fresh Produce

Kenya, Ethiopia, Senegal, Morocco, and Ghana have strong production bases in fruits and vegetables, with significant cold-chain and processing gaps that prevent export competitiveness and regional supply chain development. Direct linkages exist to French market access, CIRAD/INRAE post-harvest and processing technology, and French cold-chain and logistics expertise. The Fit for Africa programme (European Commission/COLEAD) supports the upgrading of African export chains to the European market and facilitates quality certification, representing a concrete mechanism for improving market access. Nutrition-sensitive horticulture — supporting dietary diversity and micronutrient outcomes — is embedded in this value chain.

Investment focus: cold-chain infrastructure; processing and packaging; SPS harmonisation; quality certification for EU and regional market access; and the Fit for Africa upgrading programme.

4.3 Coffee, Tea, Cocoa & High-Value Specialty Crops

Africa produces approximately 70% of the world's cocoa but processes less than 20% domestically. African coffee and tea are largely exported as raw commodity and processed elsewhere, despite East Africa (Kenya, Rwanda, Ethiopia, Uganda) holding some of the world's most prized origins. The development of geographical indications — including the Murang'a Tea GI project in Kenya, supported by Equity Bank — and quality chains for vanilla (Madagascar via the Livelihoods Venture fund) and cocoa and shea (Ghana) represent high-value, high-employment, and nutritionally significant opportunities. France is a major importer of these crops and has deep commercial relationships with origin countries.

Investment focus: origin processing and fermentation facilities; tea processing, blending, and packaging infrastructure; geographical indication development; quality certification (fair trade, AOC-equivalent); direct trade partnerships; and digital traceability.

4.4 Sustainable Farming, Research & Innovation

Underpinning all value chains is the imperative of sustainable, climate-resilient, and nutrition-sensitive farming. The research-training-innovation-development continuum represents a distinctive French added value: CIRAD, INRAE, IRD, and the TSARA action research initiative provide the scientific foundation, while the International Innovation Hub offers a platform for private actors to develop and scale innovative solutions and train their executives. African farmer professionalisation supported through agricultural education partnerships with France is central to making sustainable productivity gains viable and lasting. The 2024 Nairobi Declaration's soil health and fertilizer action plan anchors the agronomic dimension across all value chains.

5. OBJECTIVES

The Agriculture Pillar roundtable is a platform for African governments, French partners, and investors to move from dialogue to commitment. It will focus on three objectives:

1. Identify and advance priority agricultural value chains as the concrete focus of Africa-France commercial partnership, with nutrition and sustainability outcomes embedded — building on France's existing research, technical, and financial presence on the continent.
2. Unlock blended finance commitments — with indicative figures and clear timelines — from AFD, Proparco, BPI France, IFAD, FAO, African agricultural banks, and multilateral partners for agro-processing, cold-chain infrastructure, value chain development, and sustainable farming.

3. Agree on a follow-up framework for tracking commitments and indicative investment targets advanced at this session, with a defined review interval and clear accountability through existing AU-France coordination structures.

6. EXPECTED DELIVERABLES

- Announced financing commitments from African public agricultural banks, development partners and private sector partners against specific value chain investment priorities, with indicative figures on record, supported by the European Commission and AFD
- Commit to work towards increased knowledge transfer from France agricultural research partnership anchored in CIRAD/INRAE to support African national agricultural research institutions, in areas covering post-harvest technology, processing, soil health, and value chain science.
- Establishment of a follow-up and accountability pathway through existing AU Commission and AUDA-NEPAD structures to track progress on commitments and maintain momentum post-summit.

8. CONCLUSION

The Africa Forward Summit 2026 presents a strategic inflection point for the Africa-France agricultural partnership. By convening at Heads of State level, with development finance institutions, African agricultural banks, research institutions, and private sector partners at the table, this roundtable has the convening weight to convert partnership intentions into a compact and announced investment commitments, with nutrition outcomes, sustainable farming, and equitable value chain development at the centre.

A fair and rebalanced Africa-France agricultural partnership — one that elevates African economies, feeds and nourishes Africa's growing population, empowers women and youth, and structures value chains that capture value on the continent — is both achievable and overdue. The Compact adopted at this session will provide the architecture for that ambition, and the Africa Forward Summit the political moment to launch it.