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THE ECOWAS AGRICULTURE TRADE AND MARKET SCORECARD (EATM-S)

**Status of the Implementation of Regional Trade Policies
and Regulations in West Africa and the Sahel**

Policy Brief



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EXECUTIVE SUMMARY

West Africa is facing a rapidly growing demand for food, which is being met primarily and increasingly through imports. Currently, less than 7.0 percent of regional food imports originate from within the region. More generally, the share of regional markets in the total value of agricultural exports is less than 10 percent, about 50 percent lower than the average for Africa as a whole. It is clear that West African countries are falling short of the region's ambitions in the areas of agricultural trade and market integration. Therefore, tangible progress toward achieving food sovereignty will depend on the region's ability to raise the competitiveness of domestic sectors in regional markets in order to capture a significantly larger share of regional food demand. This requires understanding and addressing all the barriers and factors affecting the cost of moving agricultural products and inputs across borders within the region.

Consequently, the ECOWAS Commission has established a performance measurement and tracking mechanism — the ECOWAS Agriculture Trade and Market Scorecard, a monitoring, evaluation, accountability, and strategic planning mechanism to equip the Commission and Member States with the tools, methodology, and digital platform, to track and measure all the barriers, as well as policy and institutional impediments that constrain the capacity of national agricultural sectors to successfully compete in the regional market. The ECOWAS Agriculture Trade and Market Scorecard contributes to the implementation of the [West African Food System Resilience Program](#) (FSRP), a multi-phase regional flagship investment program facilitated by the World Bank to improve preparedness for tackling food insecurity and strengthen the resilience of West African food systems.

This brief provides a high-level summary of the findings from the first cycle of implementation of the ECOWAS Agriculture Trade and Market Scorecard in five pilot countries: Chad, Ghana, Niger, Sierra Leone, and Togo, with related lessons and recommendations.

RELEVANT ECOWAS TRADE POLICY AND REGULATORY FRAMEWORKS

The ECOWAS Agriculture Trade and Market Scorecard methodology was developed following the review of **ten key regional and continental trade policy and regulatory frameworks**, namely: (i) the ECOWAS Trade Liberalization Scheme ([ETLS](#)); (ii) the Common External Tariff ([CET](#)); (iii) [the Customs Code](#); (iv) the Program of Development of Joint Border Posts; (v) the [Regulation on Harmonization of the Rules Governing Pesticides Registration in ECOWAS Region](#); (vi) the Regulation on Harmonization of the Rules Governing Quality Control, Certification and Marketing of Plant Seeds and Seedlings; (vii) the Regulation Relating to Fertilizer Quality Control in the ECOWAS Region; (viii) Africa Continental Free Trade Area ([AfCFTA](#)); (ix) the African Union Sanitary and Phytosanitary ([SPS](#)) Policy Framework; and (x) the [CAADP Malabo Declaration](#).

The successful implementation of the ECOWAS Agriculture Trade and Market Scorecard will help close data, knowledge, and policy gaps, trigger peer pressure, and thus further incentivize countries to effectively and consistently implement these existing regional frameworks.

THE ECOWAS AGRICULTURE TRADE AND MARKET SCORECARD METHODOLOGY

AKADEMIYA2063¹ was selected to provide technical expertise for the development of the scorecard methodology and its implementation, working in close collaboration with all relevant stakeholders at both regional and national levels. The methodology entailed the definition of key indicators and metrics to measure the level and composition of trade in regional markets, the cost of moving goods across borders, and compliance with policy, regulatory, and institutional measures that affect the movement of goods in domestic and regional markets. The Scorecard ultimately provides an effective instrument for tracking and measuring progress, as well as obstacles, toward the effective implementation of key regional policies and strategic frameworks that aim to promote cross-border trade and the integration of regional markets.

The development of the ECOWAS Agriculture Trade and Market Scorecard methodology included the following key components and steps:

Stocktaking and Review of Agrifood Trade Accountability Mechanisms: An extensive stocktaking of past and existing agrifood trade accountability mechanisms and corresponding data collection methods, covering initiatives inside and outside West Africa, including continent-wide initiatives, such as the African Union Commission (AUC) CAADP Biennial Review (BR) process.

Broad Consultation with key Regional Stakeholder Constituencies: The Taskforce brought together representatives from various regional organizations, including ECOWAS, the West Africa Economic and Monetary Union (WAEMU), and the Permanent Inter-State Committee for Drought Control in the Sahel (CILSS), national governments, and non-state actors such as farmer organizations, civil society organizations, and private sector associations (chambers of commerce and traders' and transporters' associations).

Elaboration of a Detailed Results Framework (RF): The logic behind the Results Framework assumes that: (i) boosting regional trade in agricultural goods and inputs requires (ii) significant reduction in costs and barriers to moving these goods and inputs across borders, which in turn depends on (iii) notable progress in effective implementation of regional trade policies and regulations. The RF comprises 13 result areas with a total of 19 indicators and 84 parameters to track and measure progress along the chain of logic.

Development of an Interactive Digital Platform (E-Platform): The digital platform offers a suite of interactive tools for trade data collection, compilation, and management at the country level,

¹ AKADEMIYA2063 is the main provider of knowledge and capacity-strengthening support for review, benchmarking, and mutual learning to advance the Comprehensive Africa Agriculture Development Programme (CAADP) agenda under one of its flagship programs, the Regional Strategic Analysis and Knowledge Support System (ReSAKSS). ReSAKSS provides technical guidance to the AUC and the African Union Development Agency – New Partnership for Africa's Development (AUDA-NEPAD) on the development and operationalization of CAADP Biennial Review (BR) indicators, including the deployment of an interactive platform for data collection and analysis.

including functionalities for data visualization, quantitative exploration, and downloading. The e-platform allows countries to collect the necessary data to calculate the relevant scores and issue reports.

Elaboration of Communications Tools: A communications strategy is developed, comprising targeted key messages, communications materials, and dissemination tools and channels to strengthen ground-level awareness of the scorecard methodology and support efforts to promote widespread uptake and sustainability at regional and national levels.

FINDINGS FROM THE PILOT PHASE

Following the logic of the Results Framework, three main scores are generated, integrating the findings from all the indicators:

- Score related to the extent of implementation of regional trade policies and regulations.
- Score related to the reduction of costs of moving goods across domestic and cross-border markets.
- Score related to contribution to expanding intra-regional exports and imports.

The findings from the pilot phase, carried out in five countries — Chad, Ghana, Niger, Sierra Leone, and Togo — are presented below. They assess the progress and weaknesses on the ground and formulate recommendations for future action.

Level and Composition of Regional Agrifood Trade

This component focuses on assessing growth in overall intra-regional trade in agricultural goods and inputs, as well as the diversity in trade products and markets within the ECOWAS region. In 2022, the five pilot countries traded nearly US\$2 billion in agricultural and food products with other ECOWAS Member States, representing more than a sixfold increase from the value in 2010. This significant increase is driven by the values reported by Ghana, which show a nearly sevenfold increase. This appears to be on the high side, as data from other sources indicate that Ghana's regional trade has approximately doubled during the same period. Intra-regional trade by the five pilot countries is not diversified enough in terms of the number of traded commodities and trade partners. Hence, expanding the share of intra-regional trade calls for efforts to boost both the level and composition of trade.

Costs and Barriers to Moving Agricultural Goods and Inputs Across Borders

The Scorecard is an effective tool for measuring and tracking the most important determinants of trade performance in regional agricultural and food markets. These include the costs associated with trading agricultural goods and inputs across borders, the time it takes to move such goods and inputs across borders, and the administrative burden of processing trade-related documents at border crossings.

Based on data from the pilot countries, traders spent nearly 10 percent of the value of the traded merchandise on documentation, border compliance, and domestic transportation. In particular, the time associated with exporting and importing agricultural goods and inputs is fairly substantial. This includes time for document processing, compliance with border measures, and transportation of agricultural goods and inputs across domestic markets. On average, it takes a trader up to 6 days to comply with the documentation requirements and 1.6 days to complete the border compliance procedures. It takes on average 1 day to move goods over a distance of 100 km, with an average of 2 to 3 road inspections and checkpoints for every 100 km. This is compounded by the fact that barely more than half of the interstate road networks are of good or fair quality.

Furthermore, deficient interstate transport infrastructure is inhibiting competitiveness in regional markets, as illustrated across the pilot countries. Competitiveness in regional markets is also hindered by the high costs of trading across borders.

One notable area of progress is the significant improvement in the mutual recognition and processing of trade-related documents among the pilot countries. This is reflected in a low prevalence of rejection of Certificates of Origin (COOs) and other mandatory documents, as well as a high proportion of COOs processed within 15 days.

National Implementation of Regional Trade Policies and Regulations

The analysis of the five pilot countries indicates that the implementation of regional trade policies and regulations averages around 30 percent. The establishment of the common market calls for the abolition of customs duties or all other charges with equivalent effect, the removal of quotas and other quantity restrictions or prohibition, as well as administrative obstacles, and the adoption of a Common External Tariff (CET), all of this to be completed by the end of 1999.

In terms of progress, all pilot countries have established monitoring mechanisms, cross-border redress systems, and consultation mechanisms to address non-tariff measures (NTMs). However, the ambition to put in place the ECOWAS common market has been realized at only around 25 percent. The findings from the pilot phase indicate that, as of 2022, 90 percent of imported agricultural goods and inputs remained subject to tariffs or other charges with equivalent effects. In addition, 60 percent of regional imports and exports were still subject to restrictions or prohibitions, while three-quarters of agrifood exports were subject to export taxes, and more than half faced import quotas.

While the CET is being applied across the pilot countries, and good progress has been made in removing obstacles to the processing of requests for COOs and mutually recognizing trade documents, only 8 percent of the mandatory documents are processed through the electronic system. Yet, Article 33 of the ECOWAS Customs Code requires all customs procedures to be undertaken using electronic data processing techniques.

Moreover, the findings across the pilot countries reveal areas of insufficient cooperation in customs, administration, and border procedures, despite requirements under Article 63 of the

ECOWAS Customs Code that controls performed by customs authorities be conducted in close collaboration with other non-customs authorities at the same time and in the same location.

Finally, in the area of harmonization of regulations for agricultural inputs, the findings indicate that less than 20 percent of seed varieties are registered and included in the regional list of approved agricultural inputs. This significantly limits the distribution of and access to improved varieties, which is crucial for boosting food supply and the competitiveness of national agricultural sectors in regional markets. To complicate the situation further, a very limited number of trained licensed professionals are active in the agricultural inputs sector, amounting on average to less than 10 professionals per 100,000 rural inhabitants across the pilot countries.

RECOMMENDATIONS AND CALLS TO ACTION

At the conclusion of the pilot phase of the ECOWAS Trade and Market Scorecard, the following recommendations have emerged.

The findings confirm that ECOWAS countries do not trade sufficiently with one another. The share of intra-regional trade in total food exports and imports by the five countries is less than 10 percent, which is similar to the average intra-ECOWAS trade share. Reducing food import dependency in the region, therefore calls for concerted efforts by all countries to fully implement all community policies and regulations to facilitate cross-border trade and advance regional market integration.

In order to reduce the cost of trading across borders and increase the competitiveness of national sectors in regional markets, action is needed to minimize the time and costs associated with moving agrifood goods and inputs from one country to another. The issue here is not one of compliance, but rather significant delays in processing and ensuring compliance, including along transport corridors. Simplification of these modalities requires administrative action and enforcement by individual governments.

The overall findings and specific recommendations from the pilot phase are summarized below, highlighting the areas where good progress has been made and where urgent action is required.

Areas of Good Progress

1. *The CET is being applied across the pilot countries.*
2. *Obstacles to the processing of COOs and other trans-border related trade documentation have been removed or significantly reduced.*
3. *There is effective mutual recognition and processing of trade-related documents between the pilot countries and other ECOWAS Member States.*
4. *All pilot countries have put in place the necessary monitoring mechanisms, cross-border redress systems, and consultation mechanisms to address NTMs.*

Areas Requiring Particular Attention

1. *There is an urgent need to reduce and limit the number of checkpoints across regional trading corridors in the short run, and in the long run, to partner on upgrading road infrastructure along these corridors.*
2. *Countries would need to identify current barriers and develop time-bound plans to enhance collaboration, thereby improving coordination and cooperation in customs, administration, and border procedures.*
3. *Dedicated efforts are required within specified timeframes to update and significantly expand the list of registered agricultural inputs for better harmonization.*
4. *It is necessary for countries to identify and remove obstacles to and encourage private sector entry into the agricultural input sectors to boost competition.*
5. *Finally, a comprehensive capacity-building and training plan needs to be drawn and broadly implemented to create a critical mass of licensed professionals in the seeds and fertilizer value chains.*



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