
Executive summary

The West African population is projected to double by 2050, during which time agricultural production systems will profoundly change. The WAF report highlights the main features of settlement (from a homogenised base), agriculture and food security. It also provides an analytical framework and tools to allow policies to anticipate and incorporate the coming changes. The analysis particularly focuses on population concentration and on its corollary, market development, so as to shed light on some of the regional issues ahead.

- West Africa is one of the last regions that has not completed its demographic transition. Between 1950 and 2010, its population increased from 72 to 290 million inhabitants. In these 60 years, the urban population multiplied by nearly 20 times – from 6 to 118 million inhabitants. In 1950, no country in the region had a level of urbanisation higher than 20%, while in 2010, eight countries had a level close to or higher than 50%.
- West African agricultural producers have increased production to meet growing demand. Between 1980 and 2010, agricultural production growth averaged 3.7% making it the fastest growing region of the world. Over the same period, the total production tripled and per-capita food production increased by 1.8% per year.

- Since 1990, the prevalence of undernourishment has decreased by 44% at the regional level, although unevenly across countries. Despite these advances, the food situation remains critical. According to the FAO, 33 million people (12% of the total population) remained undernourished in 2006–08.

These evolutions have led to profound changes in the human and economic geography of West Africa. Urban growth has manifested in the growth of the largest cities and the development of a network of small and medium-sized towns, which act as nodes for the spatial organisation of trade and markets. As a result of these dynamics, agriculture is transforming and the rural economy is diversifying. The share of agricultural producers in the total population decreased from 90% in 1950 to 50% in 2010. In rural areas, 25% of the population is no longer engaged in agricultural activities. More than two-thirds of household food consumption is bought on the market, and the food value chain is based primarily on informal dynamics.

Impressive gains have been realised in terms of productivity per agricultural producer, which has increased by 2.6% per year since 1980. Over the same period, yields have grown an average of 1.4% annually. These developments reflect the gradual integration of West African agriculture into the market economy,

which has brought about new incentives for producers, and which poses a variety of challenges for policy makers.

The balancing between food demand and agricultural supply is taking place in a space structured by transportation and communication networks, with transaction costs depending on location. City-countryside relations are part of a continuum in which the role of markets is essential. The growing importance of the market and of the concentration of food consumption and production has created stronger interdependencies between geographical areas and actors. The rural/urban transition accentuates the heterogeneity in the levels of development of rural areas. It underscores that the more farms are connected to markets, the more they evolve and the more diversified their supply becomes.

These trends should continue until 2050, when there will be 400 million urban dwellers in the region, with two urban dwellers for each rural inhabitant. By that time, agricultural producers will represent no more than 22% of the total population. A number of policy levers have been identified for responding to these changes. For example, an active demographic policy will allow the region to take advantage of the demographic dividend; urban and agricultural policies linked by the common challenge of combating food insecurity are indispensable.

The main challenge identified by our analyses, however, is that of the future of agricultural

systems. The growth of the non-agricultural population is an accelerator for the division of labour between agriculture and other sectors of the economy. Two major trends are emerging: the specialisation of small- and medium-scale farms in market-oriented production and the establishment of very large farms. This will translate into farms using more capital and more agricultural inputs. The future of West African agriculture depends in part on its capacity to develop an integrated agro-food complex.

The changes described in this report have taken place within the context of an intensification of agricultural land use. Between 1980 and 2000, cropping intensity increased steadily. Beyond the expansion of cultivated areas, yield gains now account for 40% of growth in production. Due to a lack of data and homogeneous definitions, the amount of actual agricultural land is difficult to assess. In addition, there are still challenges related to the regulation of land investments through legal mechanisms that respect the interests of all stakeholders.

At the macro-regional level and in the long-term, subject to the necessary adjustments and policies, and if internal and intra-regional migration are not impeded, neither labour nor natural resources appear to be factors limiting agricultural production and food security in West Africa.

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