



Strengthening Policy and Regulatory Frameworks for Fertilizer Subsidy Programmes in Africa

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Summary

In 2016/17, AGRA undertook an assessment of marketing and distribution systems of fertilizer and farm inputs in 11 selected countries (Burkina Faso, Ethiopia, Ghana, Kenya, Malawi, Mali, Mozambique, Nigeria, Rwanda, Tanzania, and Uganda) resulting in several recommendations for improving the enabling environments for implementation of fertilizer subsidy programmes (FSPs). The uptake of AGRA's recommendations has been incomplete, leaving several gaps and challenges in fertilizer industries that create incentives for behavior and arrangements that undermine the efficiency, effectiveness, and sustainability of FSPs. These gaps and challenges include:

¹ This brief is one of three policy briefs that address FSP design and delivery, scale and impacts, and policies and regulations. The three briefs are distinct yet inherently interrelated. While each brief is a stand-alone product with topic-specific findings and recommendations, due to important interrelationships in topics and findings across some of the briefs, the three documents are best read in tandem. A summary report is also available. A short list of key sources is included here. The full listing is available in the summary report.



1. Dispersion, duplication, and incoherence across policies, acts and laws, and regulations
2. High transport and handling costs
3. Distorting output trade restrictions
4. Poor quality control
5. Small market size, limited competition, and low transparency
6. Limited trader and agrodealer finance
7. High barriers to regional trade.

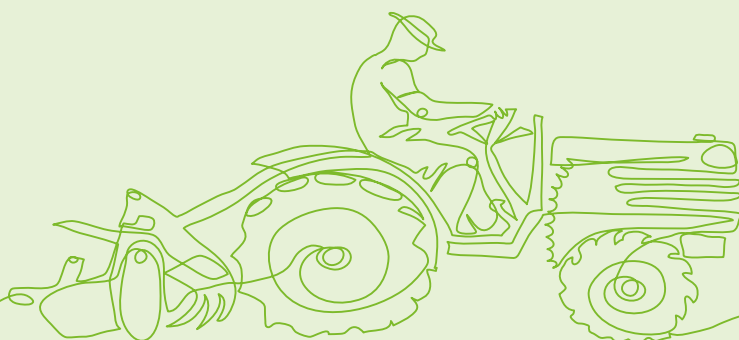
To overcome these gaps and challenges, national authorities must take urgent actions over the short-term and medium-term.

Short term actions (within 1-2 years) include:

1. Establish a single organization responsible for overseeing and implementing fertilizer industry policies, laws, and regulations
2. Sustain and increase investments in road and rail infrastructure and local production and blending facilities
3. Ensure coherence between agricultural output trade policies and fertilizer price and subsidy policies
4. Reform import tendering rules and procedures to boost transparency and competition
5. Streamline bureaucratic processes that delay payments to importers and distributors

Medium term actions (within 3-5 years) include:

1. Harmonize regional standards and policies to enable bulk procurements and reduce transaction and transportation costs across borders
2. Invest in physical, technical, and organizational capacity for fertilizer quality control and monitoring beyond ports to ensure consistency and safety in fertilizer products.
3. Consolidate all testing and quality control of fertilizers under one authority to centralize oversight and ensure uniformity in standards
4. Enhance financial incentives for private importers, distributors, and agrodealers handling subsidized fertilizer by tackling payment delays, negotiating trade guarantee agreements, and developing flexible financial packages
5. Modernize equipment and procedures for bulk handling and distribution of fertilizer
6. Relax trade regulations that require all fertilizer blends to be tested and approved before use, while maintaining safety standards
7. Sustain commitment to regional integration by prioritizing regional infrastructure projects, trade corridors, and adoption of common fertilizer standards and regulation



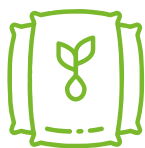
Background

The enabling environments for efficient, effective, and sustainable FSPs coincide with the enabling environments for the efficient, effective, and sustainable functioning of the fertilizer industries within which FSPs are designed and delivered. Policy and regulatory frameworks that help FSPs meet the dual objectives of increasing fertilizer use while contributing to fertilizer market development are therefore identical to those that promote efficient, effective, and sustainable fertilizer industries. These frameworks comprise policies, laws, regulations, and institutional infrastructures that define the conduct of core fertilizer industry functions (production, blending, importation, and distribution of fertilizer) by relevant industry actors. Efficiency, effectiveness, and sustainability entail boosting competition, which puts downward pressure on fertilizer prices, widens the range of quality fertilizers available in markets, and enhances farmer access to fertilizers. Such outcomes are also core aims of FSPs, which seek to boost fertilizer use while contributing to fertilizer market development.

In 2016/17, recognizing these opportunities and imperatives in Africa's fertilizer industries, AGRA undertook an assessment of marketing and distribution systems of fertilizer and farm inputs in 11 selected countries (Burkina Faso, Ethiopia, Ghana, Kenya, Malawi, Mali, Mozambique, Nigeria, Rwanda, Tanzania, and Uganda) resulting in several recommendations for improving the enabling environment for implementation of FSPs. Drawing from that assessment and other relevant studies, this brief: **(i)** reviews the main features of fertilizer industries in the 11 countries, seeking to identify significant similarities and differences across them; **(ii)** considers the degree to which AGRA's 2016/17 recommendations were adopted and summarizes current fertilizer policy and regulatory frameworks in the countries, as determinants and reflections of conditions in fertilizer industries; **(iii)** identifies enduring gaps and inconsistencies in these frameworks; and **(iv)** presents recommendations for policy and regulatory improvements toward enhanced FSPs in Africa.

Main Features of Fertilizer Industries

Figures 1–3 describe current conditions in the fertilizer industries in the 11 countries based on national consumption of fertilizer, sub-national consumption of fertilizer, agrodealer concentration, fertilizer subsidy levels and types, domestic production and blending of fertilizers, and stakeholder roles (focusing on the roles of governments and the private sector). In summary:



1. **National consumption of fertilizer** averaged 553,000 MT in 2020, with a high of 1,418,000 MT (Nigeria) and a low of 61,000 MT (Uganda) (Figure 1, panel A). These aggregate levels of fertilizer consumption appear to be linked to country size and agricultural GDP (Figure 1, panel B).



2. **Sub-national consumption of fertilizer** averaged 34 kg/ha of arable land in 2020, with a high of 107 kg/ha (Ghana) and a low of 2 kg/ha (Uganda) (Figure 2, panel A). This metric is not equivalent to the fertilizer application rate, which is a farm-level measure of actual use of fertilizer. Rather, this measure captures the overall intensity of fertilizer consumption for the agricultural sector as a whole.



3. **Agrodealer coverage** averaged 7,800 farmers/agrodealer in 2022, with a high of 29,7000 farmers/agrodealer (Mozambique) and a low of 270 farmers/agrodealer (Mali) (Figure 2, panel B). These investments seek to make fertilizers available to numerous farm households at affordable prices, in suitable bag sizes, and at sales points as close as possible to farm-gates. Ethiopia, Mozambique, Nigeria, and Uganda are lagging far behind the other countries.



4. **Fertilizer subsidies** averaged 57 percent in 2020, with a high of 77 percent (Mali) and a low of 40 percent (Tanzania) (Figure 3, panel A). Between 2017 and 2022, the average expenditures on FSPs was \$35 million, with a high of \$72 million/year (Kenya) to \$2.5 million/year (Mozambique) (Figure 3, panel B). Four FSPs were **universal** (Burkina Faso, Kenya, Mali, and Tanzania); five were **targeted/smart** (Ghana, Malawi, Mozambique, Rwanda, Uganda). Degrees of universality and “smartness” varies across countries, with wide differences in objectives, eligibility criteria, coverage, monitoring and evaluation, and exit strategies. Products covered in FSP packages typically include seeds alongside fertilizers, with wide differences in size, value, and range of packages. In several countries, the level and composition of subsidized packages varies over product and time (e.g., Tanzania and Uganda).²



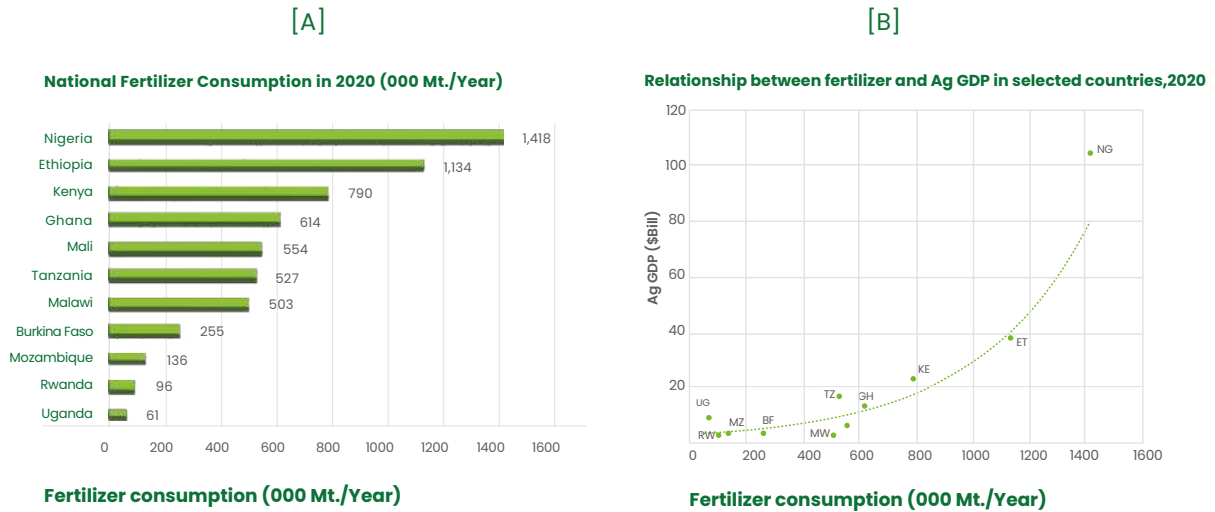
5. **Five countries** have invested in **domestic production of fertilizers** (Ethiopia, Kenya, Mali, Nigeria, Tanzania); ten have installed **blending capacity** (only Rwanda has not done so). These investments are growing steadily in number and size, seeking to lower cost and adapt fertilizer use recommendations and subsidy packages to local soil conditions in various agroecologies, thereby maintaining soil health, improving crop response, and increasing profitability of fertilizer use.



6. **Stakeholder roles** have been shaped by the liberalization and privatization of fertilizer industries in the 1990s that conferred stronger roles to the private sector in key functions, with governments urged to concentrate on creating an enabling environment for the private sector. But governments continue to play important roles in Ethiopia (government monopoly on importing), Malawi (state-dominated importing and distribution), Mali (state-run importing, processing, and distribution and pricing system), Rwanda (public procurement of subsidized fertilizer), and Tanzania (public bulk procurement of fertilizers).

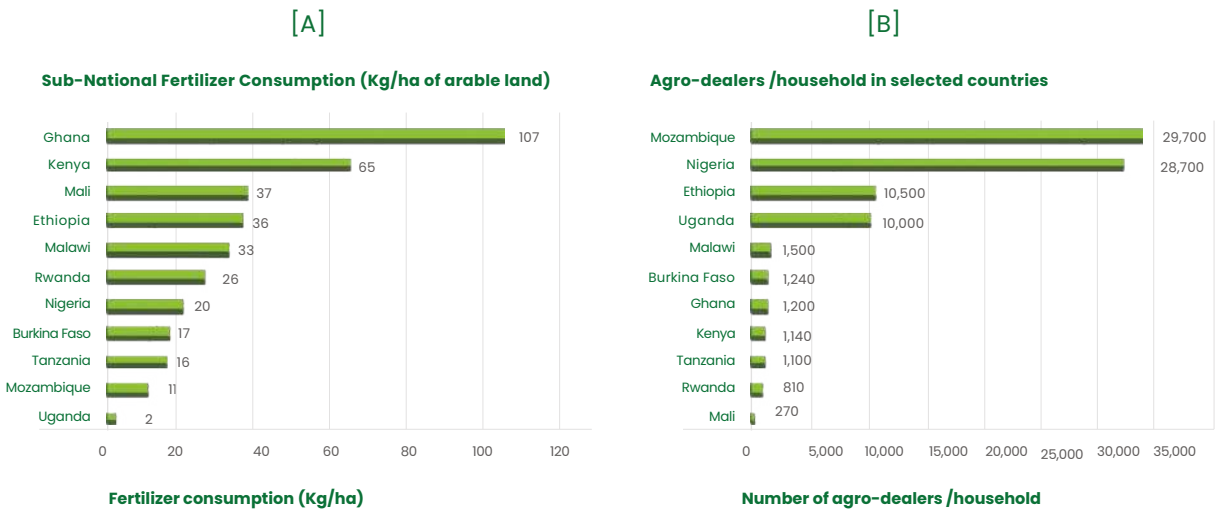
² For details, please refer to the companion policy brief on the design of FSPs.

Figure 1: National fertilizer consumption [A] and the relationship between national fertilizer consumption and agricultural GDP [B] in selected countries, 2020



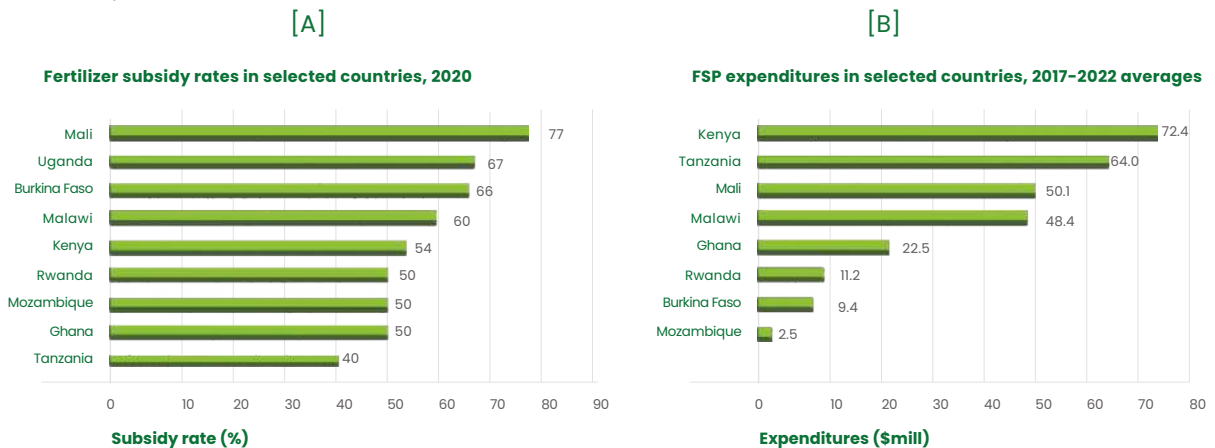
Source: A = AFAP: <https://afap-partnership.org/africa-fertilizer-map-2020/>; B = World Development Indicators: <https://data.worldbank.org/indicator/AG.CON.FERT.ZS>

Figure 2: Sub-national fertilizer consumption in selected countries in 2020 [A] and number of agrodealers per household in selected countries in 2023 [B]



Sources: A = World Bank indicators: <https://data.worldbank.org/indicator/AG.CON.FERT.ZS>; B = African Seed Access Index <https://www.tasai.org/en/dashboard/cross-country-dashboard/>

Figure 3: Fertilizer subsidy rates in 2020 [A] and FSP expenditures levels in 2017-2022 [B] in selected countries, 2020



Note: Ethiopia and Nigeria do not operate FSPs; data for Uganda are not available. Sources: Authors based on stakeholder consultations



Uptake of AGRA Recommendations to Strengthen FSP Policy and Regulatory Frameworks

These conditions in fertilizer industries reflect the intentions and levels of implementation of fertilizer policy and regulatory frameworks. The underpinnings and building blocks of fertilizer policy and regulatory frameworks are complex and inherently dynamic. They include policies and regulations affecting: **(i)** interest rates, domestic prices (inflation), taxes, foreign currency exchange rates, import and export tariffs, border charges, and other economy-wide variables that define core incentives in fertilizer industries, especially with respect to fertilizer importing; **(ii)** the quality of fertilizer products; **(iii)** the introduction and registration of new products and companies; and **(iv)** fertilizer distribution policies. FSPs must be coherent with these industry-defining policy and regulatory frameworks.

Fertilizer industries are shaped and governed by policies, acts and laws, and regulations. Fertilizer *policies* establish broad guidelines for the industry and establish related initiatives, such as capacity building programmes and subsidies. Fertilizer *acts and laws* prescribe a legally binding framework with rights and obligations concerning manufacturing, importation, distribution, marketing, storage, labelling, trade, and use of fertilizers. Acts and laws also stipulate regulatory and governance

structures and create enforcement measures with penalties for failure to comply with provisions. Units or departments with administrative authority may be created under the acts or laws. Lastly, fertilizer *regulations* articulate how the general rights and obligations embodied in acts and laws are to be applied in practice, encompassing guidelines for registration of products and businesses, standard setting, product packaging and labelling, warehousing, quality inspection and monitoring procedures, and penalties and enforcement.

AGRA’s 2016/17 recommendations were that countries should: **(i)** develop policy and legal statutes (fertilizer policies and laws) frameworks on agricultural inputs; **(ii)** outline regulations and/or standards on fertilizer production, importation, transportation, storage, distribution, use and health hazards; and **(iii)** unify all fertilizer-specific policies, laws, and regulations under one organization.

Full implementation has been achieved in Ethiopia, Mozambique, and Tanzania; limited implementation has occurred in Malawi, Nigeria and Rwanda. Burkina Faso, Ghana, Kenya, Mali, and Uganda show varying degrees of partial implementation.

All countries (except Kenya and Malawi) have developed and operationalized fertilizer policies. A few (Ethiopia, Mali, Malawi, Mozambique and Tanzania) have stand-alone fertilizer acts/laws. Ghana, Kenya and Rwanda have fertilizer laws combined with other products (like seeds, agrochemicals or animal feeds) in single acts, while Nigeria has a variety of fertilizer regulations operationalized by different organizations. Nigeria and Uganda are developing fertilizer laws. Malawi’s recently developed fertilizer law has yet to be supported by operational infrastructures. Only Malawi, Nigeria and Uganda are yet to develop fertilizer regulations.

Fertilizer standards are central in regulatory systems and are managed differently across countries. In Ghana, Kenya, Nigeria and Rwanda, fertilizer standards are prescribed in the Standards Acts. In Ethiopia and Tanzania, they are contained in the fertilizer legislation. The status in Burkina Faso, Malawi and Malawi. Uganda is in the process of developing standards as part of its new fertilizer policy.

Table 1: Alignment with AGRA recommendations and status of fertilizer policies and regulatory frameworks

Country	Alignment with AGRA recommendations and status of fertilizer policy regulatory frameworks
Burkina Faso	<p>Policy: No Fertilizer Policy in place</p> <p>Acts/Laws: Fertilizer law that provides for fertilizer registration, import, distribution and quality control available</p> <p>Regulations: Regulations yet to be developed</p> <p>Implementation of AGRA recommendations: Partial implementation of AGRA recommendations</p>
Ethiopia	<p>Policy: National fertilizer policy available</p> <p>Acts/Laws: Fertilizer law explicitly provides for registration, standard and quality control</p> <p>Regulations: Regulations available</p> <p>Implementation of AGRA recommendations: Full implementation of AGRA recommendations</p>
Ghana	<p>Policy: Fertilizer policy in place</p> <p>Acts/Laws: Fertilizer registration, import, distribution and quality control prescribed under the <i>Plants and Fertilizer Act 2010 (Act 803)</i> and managed by the Ministry in charge of Agriculture</p> <p>Regulations: Regulations available</p> <p>Implementation of AGRA recommendations: Partial implementation of AGRA recommendations.</p>

Country	Alignment with AGRA recommendations and status of fertilizer policy regulatory frameworks
Kenya	<p>Policy: No fertilizer policy in place.</p> <p>Acts/Laws: Fertilizer registration, import, distribution and labelling prescribed under the <i>Fertilizers and Animal Foodstuffs Act (Cap 345) operationalized by Ministry in charge of agriculture.</i></p> <p>Regulations: Regulations available</p> <p>Implementation of AGRA recommendations: Partial implementation of AGRA recommendations.</p> <p>Standards: Fertilizer standards and product quality are prescribed in the Standards Act by the Kenya Bureau of Standards (KEBS) is mandated to conduct sample testing for quality control of fertilizer on arrival.</p>
Malawi	<p>Policy: No specific “fertilizer” policy (some strategy <i>in</i> place)</p> <p>Acts/Laws: Fertilizer Act enacted in 2022 and awaiting development of regulations.</p> <p>Regulations: Not yet available</p> <p>Implementation of AGRA recommendations: Limited implementation of AGRA recommendations</p>
Mali	<p>Policy: Fertilizer policy in place.</p> <p>Acts/Laws: Fertilizer law to guide fertilizer registration, import, distribution and quality control</p> <p>Regulations: Accompanying users’ regulations yet to be developed.</p> <p>Implementation of AGRA recommendations: Partial implementation of AGRA recommendations.</p>
Mozambique	<p>Policy: Fertilizer policy to guide private sector investment in fertilizer chain drafted but not approved by parliament</p> <p>Acts/Laws: Available</p> <p>Regulations: Not yet available</p> <p>Implementation of AGRA recommendations: Partial implementation of AGRA recommendations.</p>
Nigeria	<p>Policy: Not available</p> <p>Acts/Laws: Under development. National Agency for Food and Drug Administration and Control (NAFDAC) issues permits for the importation and warehousing of fertilizers, and mandated to control fertilizer quality. Agricultural Input Services Department (AISD) is charged with ensuring that both locally produced and imported fertilizers meet required quality standards as set by the Standards Organization of Nigeria (SON)</p> <p>Regulations: Not yet available</p> <p>Implementation of AGRA recommendations: Limited implementation of AGRA recommendations.</p>
Rwanda	<p>Policy: Fertilizer policy 2014 specifying governance, institutional linkages, roles and responsibilities with MINAGRI taking leadership</p> <p>Acts/Laws: Agrochemical law of 2012 governs the manufacture, importation, distribution, use, storage, sale, disposal, and burial of agrochemicals</p> <p>Regulations: Guidelines on requirements for agrochemical registration guides actors activities</p> <p>Implementation of AGRA recommendations: Limited implementation of AGRA recommendations.</p>

Country	Alignment with AGRA recommendations and status of fertilizer policy regulatory frameworks
<p>Tanzania</p>	<p>Policy: Presence of specific National Fertilizer Regulatory Authority (NFRA) to manage the fertilizer sub-sector</p> <p>Acts/Laws: Available. Fertilizer standards and product registration procedures are available in the fertilizer legislation</p> <p>Regulations: Available</p> <p>Implementation of AGRA recommendations: Full implementation of AGRA recommendations.</p>
<p>Uganda</p>	<p>Policy: Fertilizer Policy enacted</p> <p>Acts/Laws: In progress</p> <p>Regulations: In progress</p> <p>Implementation of AGRA recommendations: Partial implementation of AGRA recommendations</p>





Major Policy and Regulatory Challenges, Gaps and Inconsistencies

These policy and regulatory frameworks determine and reflect conditions in fertilizer industries that create incentives for behavior and arrangements that undermine the efficiency, effectiveness, and sustainability of FSPs.



Dispersion, Duplication, and Incoherence. Because most countries have not unified responsibility for oversight and implementation of their formal fertilizer policies, acts/laws, and regulations in single organizations, several bodies regulate the manufacture, distribution and use of fertilizer. The resulting overlapping and conflicting roles of multiple institutions in fertilizer industries leads to high transaction costs of fertilizer imports, delays in clearances of fertilizer cargo at ports, high demurrage costs, and multiple fees and charges that are eventually transmitted to farmers. For purely bureaucratic reasons, traders are compelled to renew their import and trade permits frequently, increasing operating costs that are eventually passed on to farmers. Similarly, new fertilizer products must be registered through processes that include trials of up to three years in duration. Any new fertilizer product must be registered, even if it is a globally traded product. Any alteration in fertilizer composition, formulation, type, quantity, or quality triggers a new registration process. Even a small change in the formulation of a registered fertilizer requires a completely new registration. Blends are heavily penalized since all are considered new.³

High Transport and Handling Costs. Regional and national transport costs account for much of the end-user retail price of fertilizer in Africa. For instance, in Kenya, domestic transport costs for DAP and urea fertilizers account for 33 per cent of the total cost of transporting fertilizer from Mombasa Port to Nairobi. In Rwanda, it costs approximately \$160 to transport one ton of fertilizer from Mombasa or Dar es Salaam to Kigali, Rwanda, and this adds 45 per cent to the final retail price charged for that fertilizer. In Mozambique, domestic transport costs account for over 45 percent of the total cost of moving fertilizer from Beira Port to Sofala. Overall, transport costs alone account for between 64 and 80 per cent of price differentials between landed costs and farm gate prices for fertilizer in Ethiopia.

³ Tanzania is a notable exception. With support from AGRA, the government revised regulations by centralizing regulatory functions within the Tanzania Fertilizer Regulatory Authority (TFRA), leading to an easing of the conditions for registering customized and specialist blends of fertilizer. The new regulations have resolved the conflicting and overlapping regulatory mandates by centralizing regulatory function under TFRA. Time delays and charges involved in processing consignments of fertilizer imports have been greatly reduced.

Output Trade Restrictions. The demand for fertilizers is derived from returns generated by their use in production. Some countries impose periodic bans on exports of agricultural staples. This leads to lower output prices, reduces demand for fertilizer, and blunts or erases the intended impacts of fertilizer price subsidies.

Poor Quality Control. In most countries, capacity for effective fertilizer quality control and inspection is weak, with responsibility for key functions such as pre-shipment inspection and sampling and testing at ports dispersed across multiple institutions. Many countries have established testing laboratories to support these functions, but most are not internationally accredited. This undermines the credibility of test results and limits the power of regulatory authorities to enforce penalties on firms that are trading in counterfeit or substandard products. In addition, once fertilizers leave ports, enforcement of regulations is typically left in the hands of Ministries of Agriculture, or of dedicated departments of fertilizer or quasi-governmental institutions that have extremely low numbers of inspectors and resources, rendering inspection random or absent altogether. The overlapping roles and responsibilities of multiple institutions in the fertilizer sector leads to delays in clearances of fertilizer cargo at ports and high demurrage costs. Multiple fees and charges also result, adding to cost that ultimately are transmitted to farmers.⁴

Small Market Size, Limited Competition, and Low Transparency. The fertilizer industry is growing across Africa, but it remains relatively small and high cost. A small number of large firms have come to dominate imports in many countries. Some of these companies have integrated vertically into transport, storage and even blending, thereby acquiring enormous market power. Permission to participate in government tenders is often restricted to selected importing companies, creating risk and uncertainty that reduces private incentives to invest in distribution networks. Limited competition in the importing and distribution system encourages concentration and collusion, leading to late delivery of fertilizers to farmers due to bureaucratic processes, late confirmation of the tender recipients, delays in subsequent payments, and delays in acquisition of fertilizers.

Limited Trader and Agrodealer Finance. Investments by AGRA, AFAP and other organizations to increase the density of agrodealers have increased access to fertilizer and lowered prices for farmers across the continent. In the 11 countries, from 2012 to 2020, average sub-national consumption of fertilizer grew from 19.3 to 33.8 kg/ha of arable land. But with an average coverage of 7,800 farmers/agrodealer in the 11 selected countries, access



⁴ Again, Tanzania is a notable exception. With support from AGRA, the TFRA has streamlined quality control, leading to enhanced transparency and reduced costs.



is still constrained, especially for smallholder farmers. Fertilizer trading is capital intensive. Access to finance is a first-order determinant of traders' and agrodealers' abilities to conduct business. Constraints on financing have led to delays in development and completion of local production and blending facilities. Many commercial banks are risk-averse because they have lost large sums of money in agricultural lending in the past. Poor loan recovery and the lack of mechanisms for contract enforcement in rural areas discourage banks from lending to fertilizer traders and agrodealers. Private importation and distribution of subsidized fertilizer suffers from delays in payments by the government to importers and distributors, further adding to the financial burden on the private sector.

AGRA and other stakeholders have supported successful initiatives to expand finance to agrodealers and other value chain actors in several countries. These initiatives have focused on de-risking schemes that include a range of instruments including partial credit guarantees, agricultural insurance, direct financing, digital finance-based solutions, and technical assistance and capacity building (e.g., the Ghana Incentive-based Risk Sharing System for Agricultural Lending (GIRSAL), the Nigeria Incentive-based Risk Sharing System for Agricultural Lending (NIRSAL), the Programme for Rural Outreach of Financial Innovations and Technologies (PROFIT) in Kenya, and the Africa Fertilizer Financing Mechanism (AFFM) in Tanzania). But major constraints persist.

High Barriers to Regional Trade. Inefficient port logistics, the poor state of roads, numerous weighbridges and police roadblocks and lengthy delays at border crossings affect land-locked countries impede domestic and international trade in fertilizers, distort prices and raise the cost of doing business. Although ECOWAS has adopted regulations on fertilizer use and transport, other regional economic communities in Africa are still in planning stages towards development of such regulations. All countries continue to retain their own unique fertilizer brands and formulations, which continues to hinder the cross-border fertilizer trade.



Recommendations for Further Improving Fertilizer Policy and Regulatory Frameworks

To overcome these gaps and challenges, national authorities must take urgent actions over the short-term and medium-term.

Short Term actions (within 1-2 years) include:

1. **Unifying authority of oversight and implementation:** Establish a single organization responsible for overseeing and implementing fertilizer industry policies, laws, and regulations to streamline decision-making and enforcement processes.
2. **Increasing investments in infrastructure:** Sustain and increase investments in road and rail infrastructure to facilitate the efficient transportation of fertilizers, as well as in local production and blending facilities to enhance domestic supply.
3. **Aligning agricultural output trade policies:** Ensure coherence between agricultural output trade policies and fertilizer price and subsidy policies to support agricultural productivity and ensure farmers' access to affordable inputs.
4. **Reforming import tendering rules:** Reform import tendering rules and procedures to boost transparency and competition, reduce barriers to entry for new suppliers, and ensure fair pricing.
5. **Eliminating bureaucratic processes:** Streamline bureaucratic processes that delay payments to importers and distributors, ensuring timely transactions and reducing financial burdens on stakeholders.

Medium term actions (within 3-5 years) include:

1. **Harmonizing regional standards:** Harmonize regional standards and policies to enable bulk procurements and reduce transaction and transportation costs across borders.
2. **Enhancing capacity for quality control:** Invest in physical, technical, and organizational capacity for fertilizer quality control and monitoring beyond ports to ensure consistency and safety in fertilizer products.
3. **Consolidating testing and quality control:** Consolidate all testing and quality control of fertilizers under one authority to centralize oversight and ensure uniformity in standards.
4. **Improving financial incentives:** Enhance financial incentives for private importers, distributors, and agrodealers handling subsidized fertilizer by tackling payment delays, negotiating trade guarantee agreements, and developing flexible financial packages.
5. **Modernizing equipment and procedures:** Modernize equipment and procedures for bulk handling and distribution of fertilizer to improve efficiency and reduce operational costs.
6. **Easing trade regulations:** Relax trade regulations that require all fertilizer blends to be tested and approved before use, while maintaining safety standards, to streamline the importation process and expedite distribution.
7. **Commitment to regional integration:** Sustain commitment to regional integration by prioritizing regional infrastructure projects, trade corridors, and adoption of common fertilizer standards and regulations to facilitate cost-effective bulk imports and distribution.



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