FERTILIZER CONSUMPTION TRENDS IN SUB-SAHARAN AFRICA

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Fertilizer Use in SSA, 1980-2000

thousand tons consumed

--- Sub-Saharan Africa (SSA) ----- SSA minus Nigeria
Fertilizer Use Intensity, 1980-2000 (kgs per cultivated hectare)

Change in Fertilizer Use: 1980-89 to 1996-2000

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<th>Change in Fertilizer Consumption</th>
<th>Change in Fertilizer Use Intensity</th>
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<tbody>
<tr>
<td>Sub-Saharan Africa</td>
<td>+16%</td>
<td>+5%</td>
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<tr>
<td>Sub-Saharan Africa minus Nigeria</td>
<td>+32%</td>
<td>+15%</td>
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• Overall fertilizer use intensity *still* extremely low: ~ 9 kgs/ha
• But great variability:
  – Over 100 kgs/hectare in parts of Western Kenya (where > 60% use fert)
  – Virtually nil in semi-arid areas with no water control

Aggregate Fertilizer Trends Mask Great Variability Across Countries

17 Countries Using over 10,000 tons per year.
• These 17 countries account for 87.9% of SSA fertilizer consumption
• Of these:
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- 8 Countries > 45% increase in fertilizer use per cultivated hectare (1980-89 to 1996-2000)
  - Benin, Burkina Faso, Chad, Côte d'Ivoire, Ethiopia, Kenya, Senegal, Togo

- 8 Countries < 10% increase in fertilizer use per cultivated hectare
  - Cameroon, Ghana, Madagascar, Malawi, Nigeria, Tanzania, Zambia, Zimbabwe
  - Many of these countries heavily subsidized fertilizer (> 50% in Ghana, Tanzania, Nigeria)
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– Of these, Cameroon and Ghana, which reformed early, have recovered (past pre-reform levels in Ghana)
– Nigeria, Zambia, Malawi, Zimbabwe continue to be heavily involved in fertilizer distribution
  • Designed to reduce food insecurity and/or reward political supporters
  • Discourages private investment / adds risks and costs

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• 1 Country > 10% and < 45% increase in fertilizer use per cultivated hectare
  – Mali
Summary

• Should not over-generalize
  – Fertilizer use has increased dramatically in 8/17 countries
  – Use spurred by growth in cash crop production (cotton in West Africa; sugar in Kenya)
  – Fertilizer use fell in 6/17 countries
  – Consumption trends most adverse for countries formerly applying large subsidies on fertilizer through controlled systems

Summary

• More Informed Debate Needs A More Disaggregated Picture of:
  – What accounts for the differences in countries’ performance
  – Which strata of farmers have been able to respond
  – On which crops
  – In which regions