



AGRA

Sustainably Growing
Africa's Food Systems



Realigning to Transform
AFRICA'S FOOD SYSTEMS



Realigning to Transform Africa's Food Systems

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Preparation, Bridging, Future Planning

1. Abbreviation

2. Message from the *President & Chairman*

3. Introduction

4. AGRA's New Direction

Vision

Mission

Business Lines

Delivery Model

5. 2022 Review – The Bridge Year

Snapshot: Overview of the Year & Key Results Business Lines

1. Food Systems and Climate-Resilient Agriculture
2. Inclusive Markets and Trade
 - Gender Equality and Intersectionality
3. Investments- Catalytic Grants and Blended Finance
4. Grants And Resource Mobilisation
5. Policy and State Capabilities
 - Support to Ministries of Agriculture
 - Advocacy
 - Programs

6. AGRA Partnerships *Convening Giant*

**Key results and Impact: Infographic or visual analysis
Number of farmers reached, the increase in productivity and
income, and the adoption of sustainable agriculture practices**

7. AGRA focus *Countries*

**Kenya • Mali • Burkina Faso • Ghana • Nigeria • Ethiopia,
Tanzania • Mozambique • Uganda • Rwanda • Malawi**

8. Outlook and AGRA's *Way Forward*

- **New Strategy and changes**
- **AGRA's Leadership**
- **Financial Performance**
- **Key Partners**

**Supporting smallholder
farmers to end hunger
and poverty by building
resilient food systems**

ABBREVIATIONS

AASR - Africa Agriculture Status Report
AATI - African Agricultural Transformation Initiative
ABC Fund - Agri-Business Capital Fund
AECF - Africa Enterprise Challenge Fund
AFC - Agricultural Finance Corporation
AFIO - Agri-food Industry Organisations
AFS-TC - Africa Food Security Technical Committee
AFSP - Africa Food Security Platform
AGRF - Africa's Food Systems Forum
ASDP II - Agriculture Sector Development Programme II
ASWG - Agriculture Sector Working Group
ATA - Agricultural Transformation Agency
ATO - Africa Transformation Office
AUDA - Africa Union Development Agency
AfCFTA - African Continental Free Trade Area
Agri-SME's - Agricultural small and medium-sized enterprises
Associate POs - Associate Producer Organisations
BADF - Banque Agricole Du Faso
BAGS - Boosting Agricultural Gains and Services
BDF - Business Development Fund
BDS - Business Development Service
BFAP - Bureau for Food and Agricultural Policy
BR - Biennial Review
CAADP - Comprehensive Africa Agriculture Development Programme
CALA - Centre for African Leaders in Agriculture
CESSA - The Center of Excellence for Seed Systems in Africa
CGIAR - The Consultative Group on International Agricultural Research
COP27 - Conference of the Parties
CTC - Technical Consultation Framework
EBA - Enabling Business for Agriculture
EIU - Economist Intelligence Unit
ESA - Eastern and Southern Africa
ESMS - Environment and Social Management System
FAO - Food and Agriculture Organization of the United Nations
FISFAP - Financial Inclusion for Smallholder Farmers Program
FSPs - Financial Service Providers
FTCA - Food Trade Coalition for Africa
GAPI - Global Aquaculture Performance Index
GCA - Global Centre for Adaptation
GHG - Greenhouse Gas
GIRSAL - Ghana Incentive-Based Risk Sharing System for Agricultural Lending
GRAT - Government Readiness for Agricultural Transformation
IAT - Inclusive Agricultural Transformation
ICRAF - International Council for Research in Agroforestry
IFC - International Finance Corporation
IFPRI - International Food Policy Research Institute
IPCC - Intergovernmental Panel on Climate Change
ISCPs - Institutional Capacity Strengthening Plan
JICA - Japan International Cooperation Agency

L4D - High Lands Centre of Leadership for Development
M&E - Monitoring and Evaluation
MAFAP - Monitoring and Analysing Food and Agricultural Policies programme
MAIIC - Malawi Agriculture and Industrial Investment Corporation
MEIS - Monitoring and Evaluation Information System
MEL - Monitoring Evaluation and Learning
MOUs - Memorandums of Understanding
MRA - Mutual Recognition Arrangement
MRF - Mutual Recognition Framework
NGO - Non-Governmental Organisation
NPC - National Planning and Coordination
NRFP - National Rice Flagship Program
NRSD TC - The National Rice Sector Development Technical Committee
OSAP - Oil Seed and Animal Feed
PAI - Policy Appropriateness Index
PERD-TCDA - Planting for Export and Rural Development
PIATA - Partnership for Inclusive Agricultural Transformation in Africa
PLR - Policy, Legal and Regulatory
PO - Producer Organisations
PO-RALG - President's Office - Regional Administration and Local Government
PROFIT - Programme for Rural Outreach of Financial Innovations and Technologies
PWDs - Persons with Disabilities
R&D - Research and Development
RD&E - Research Development & Extension
RFT - Regional Food Trade
SCU - State Capability Unit
SDG - Sustainable Development Goal
SEZs - Special Economic Zones
SHF - Smallholder Farming
SMEs - Small and medium-sized enterprises
SOPs - Standard Operating Procedures
SPO - Small Producer Organisations
SSA - Sub-Saharan Africa
ST-DRiz - Rice technical secretariat
STR - Simplified Trade Regime
SUA - Sokoine University of Agriculture
SeedSAT - Seed Systems Assessment Tool
TA - Target Audience
TAIDF - Tanzania Agro-industrialization Development Flagship
TAPBDS - The Tanzania Association of Professional Business Development Service Providers
TASAI - The Africa Seed Access Index
TWG - Technical Working Group
UDB - Uganda Development Bank Limited
UN - United Nations
UNFCCC - UN Framework Convention on Climate Change
VBA - Visual Basic for Applications
WAYA - Women Agri-preneurs of the Year Awards
WOW - Women to Women Supply Chain Programme



AGRA Sustainably Growing
Africa's Food Systems



**Since
AGRA's
founding,**

the organization has sought to catalyze a farming revolution in Africa, underpinned by the belief that African farmers can change their lives, move out of poverty and contribute to sustainable development...



**Chairman's & President's
*Statement***

Chairman's & President's *statement*

Unity, resilience and resolve



H.E Hailemariam Dessalegn
Former Prime Minister of Ethiopia,
Chair of the Board of Directors of AGRA



Dr. Agnes Kalibata
President, AGRA

With a great sense of belief and commitment, we introduce 'AGRA', no longer an acronym but the name of an evolved organisation and the fully realised shift from the "Green Revolution" to a sustainable transformation of Africa's food systems. This change is reflective of our journey as an alliance and our sustained familiarity with sector needs. As an African-owned and -led brand, AGRA holds a unique position as a trusted, credible voice for inclusive agricultural transformation (IAT) on the continent. It must therefore build on the past to meet the priorities of the future.

To make this foundational change, with the support of our partners we used 2022 to think, learn and plan for the necessary structural and thematic changes for the next five years. We did this with our key partners and stakeholders in our focus countries and across the continent, including farmers, civil society, the private sector and governments. We are very grateful to our partners in the Partnership for the Inclusive Agriculture Transformation in Africa (PIATA) for their strategic and financial support.

We wanted to learn from them and step forward together, an awareness that every valuable advancement is a joint effort. Partnership is pivotal in creating sustainable change at scale. Now and well into the future, these collaborations will address multiple constraints, including low productivity, environmental degradation, poor access to markets, and social and economic inequalities. As we moved forward, we developed priorities prompted by the UN Food Systems Summit (FSS) that point to a reality of holistic food systems that are inclusive, equitable, and conscious.

We have become an even better version of ourselves. We stand together with strengthened technical functions and country capabilities, and four powerful business lines that cut across all our fields of interest while prioritising climate action, youth, and gender-positive initiatives.

We are committed to innovative agricultural solutions that are sustainable and regenerative. Traditional industrial agriculture systems did not rise to the challenges of our dynamic and fairly complex sector, let alone on a vast continent. When we speak of sustainability, we mean its main dimensions- environmental, social, and economic- and the aspects of availability, access, utilisation, and stability that guarantee food security. By basing our science-based expertise in today's realities we hope to fill the gaps that these outdated systems left behind.



2022 allowed us to truly interrogate Africa's agricultural sector in a way we could not do in our day-to-day operations. It permitted us to expand our partnerships and convening reach, bring forth a new and improved AGRF and a much-enriched investment pipeline.

These platforms are necessary for amplifying Africa's urgencies and activities from a global perspective, something that we do not take for granted knowing today's and tomorrow's challenges. Accelerating climate change, pandemic vulnerabilities, and economic downturns made worse by global inflation and supply chain disruptions have stagnated yields and shown widespread weaknesses in crisis resilience, readiness, and adaptability. Because of this frequency of significant incidences affecting African Agriculture, AGRA sees a need to invest in the interrogation and innovation of farming systems that will work today and beyond.

The climate conversation is especially central in adapting agricultural practices and solutions for the long-term and has become an overarching theme in our organisational activities. As an agile alliance that has taken time to interrogate ourselves and our ecosystem, we would be remiss not to base our technical assistance and implementation recommendations around a crisis with such extensive environmental effects. Without an enabling physical environment, the agricultural sector cannot endure, and global hunger will threaten our collective existence.

Even as we pivoted to our new strategic period, we kept working, as this report shows. With the help of our development partners, and multiple actors across the continent, we continued to bring technology and investment to farmers, streamline trade, test regenerative and agroecology solutions, support governments, build ag systems and advocate for the rights and potential of Africa's farmers.

2022 was a time to lay the foundation for transformative, lasting change. Under our new strategy, we look forward to empowered countries, thriving farmers, and the change we are all looking for in agriculture and food systems.

// With a great sense of achievement, **we introduce AGRA**, no longer an acronym but the name of an **evolved organisation** and the fully realised shift from the **"Green Revolution"** to a proactive **transformation of Africa's food systems.** //





Introduction



// **The period 2017 to 2021** was **focused on scaling** scale these approaches at the country level. **Working across the continent**, AGRA directly **reached 11 million farmers** through improved technologies for increased production, mobilization of investment through the design and implementation of **flagship investments, forging of private sector partnerships, policy reform, and strengthening of input markets and extension services.** //

After almost two decades of catalysing change in agriculture, AGRA is at an exciting and pivotal time in its evolution. The period 2006 to 2016 had us put the basics in place – building farming systems that provide improved inputs and process harvests, strengthening sector leadership, and enhancing farmer knowledge. Our experience showed that an integrated delivery approach grounded on country commitment and strategic partnerships would facilitate the agricultural transformation Africa needs.

The period 2017 to 2021 was focused on scaling scale these approaches at the country level. Working across the continent, AGRA directly reached 11 million farmers through improved technologies for increased production, mobilization of investment through the design and implementation of flagship investments, forging of private sector partnerships, policy reform, and strengthening of input markets and extension services.

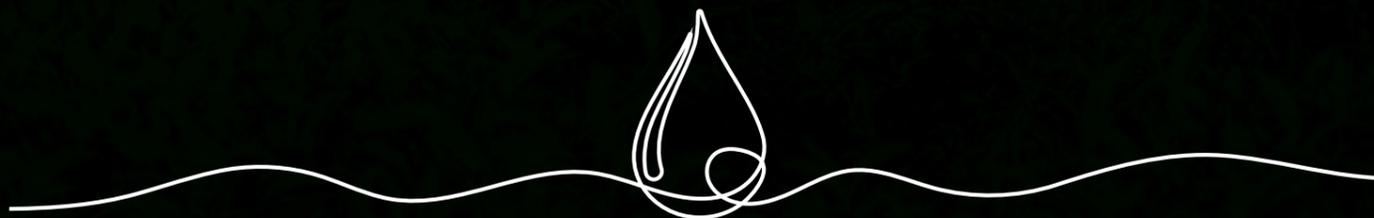
Critical lessons were picked during this period. While change was considerable across the countries we support, constraints in agricultural finance and output markets held back many farmers. Simply put, while farmers had better access to improved seed, fertilizer and knowledge because of our work – without finance and somewhere to sell at a profit, their businesses could not be transformed.

Today, deep-rooted, structural constraints continue to hold back farmers. These are significantly worsened by shocks like the Covid pandemic, and the Russia – Ukraine conflict. Above all, the deep and pervasive influence of climate change is being felt across the continent.

We learned that to address these issues, we and the continent must adopt a sustainable and holistic food systems approach that intentionally integrates nutrition, climate change resilience, and inclusivity. This must be combined with a more targeted approach to the binding constraints faced by farmers.

With the end of our second strategic period ended in 2021, with tremendous results achieved and independently evaluated, we used the year 2022 to continue delivering on our commitments. We also used 2022 as a ‘bridge year’ – to set a new direction guided by a new strategy, and the lessons of the previous 15 years.

At stake is the urgent need to deliver on our role as a uniquely African institution that is dedicated to transforming agriculture and food systems. And that is why we have over the last one year worked closely with our partners and governments to derive new country and continental plans that take into account our renewed and deepened our approach to partnerships. We will accelerate our impact through investments that lead to increased access to finance, equipment, and markets, and the enhancement of resilience of smallholder farmers.



AGRA's *New Direction*

Starting 2023, we are implementing our new five-year strategy to sustainably grow Africa's food systems by laying the foundations for inclusive agricultural transformation.

We have set ambitious targets, aligned with the 2030 Agenda for Sustainable Development. Our focus is spread across activities to fast-track the first and second Sustainable Development Goals (SDG), which target poverty reduction, zero hunger, good nutrition, and equitable livelihoods. Our work will be informed by sustainable agriculture and nature-positive approaches as we confront the reality of climate change. Crucially, our role remains catalytic – supporting governments, civil society and the private sector to lead, invest and transform the sector.

During this period, we will target up to 28 million farmers in 15 sub-Saharan African countries with ambitious and holistic agricultural targets that align with global and continental priorities; but more importantly, with the priorities of the people we aim to serve.





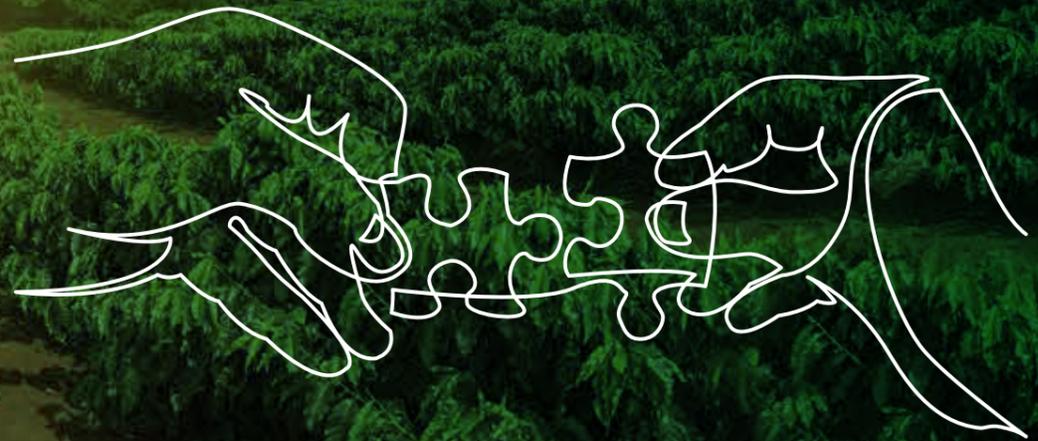
Vision

To contribute to a functional and sustainable food system across Africa whilst building resilience to climate change, reducing hunger, improving incomes and nutrition.

Mission

To catalyse the growth of sustainable food systems across Africa by influencing and leveraging partners to build a robust enabling environment, where the private sector thrives, and smallholder farmers have improved livelihoods and are empowered to produce sufficient, healthy food.

- ü Empower and build the resilience of smallholder farmers
- ü Support the development of inclusive markets and finance to strengthen agricultural systems
- ü Strengthen state capability to sustain agricultural transformation





To respond to the changing contexts of the countries in which we operate, and to properly target our investments, we will structure our work under four new business lines, namely: **Seed Systems, Sustainable Farming, Inclusive Markets & Trade, and Policy and State Capabilities.**

1. The Policy & State Capability business line reflects our understanding that agricultural transformation cannot be achieved without clear government leadership. We support governments in developing, clear policies and strong capabilities that create an enabling environment for private sector involvement in agricultural transformation.
2. The Seed Systems business line is a continuation of our work in driving crop productivity via seeds, understanding that seeds are a critical “trigger point” for improving incomes and food security.
3. The Sustainable Farming business line ensures that farmers are building resilient farming systems that enable them to sustain improved yields, and profit from them.
4. The Inclusive Markets & Trade business line focuses on strengthening viable and inclusive local and regional agri-food markets, acknowledging that this is a critical “pull” factor for farmers and businesses to enter a positive, sustained cycle of commercialization and reinvestment.

AGRA has also focused on three key cross cutting areas – climate change, improved nutrition, and inclusivity.

Towards promoting inclusivity, we will adopt strategies that eliminate the participation barriers for women and youth and enable them to contribute to and benefit from agricultural transformation. To mobilise action towards ideal climate change responses, we want to equip farmers and prioritise food systems that can absorb and recover from external shocks. We are also pursuing continent-wide nutrition, through a focus on the diversification of crops and ensuring the widespread availability of nutritious foods.

The anticipated program delivery will rely on stronger internal and external institutional capacity, inter-institutional collaboration, and state and sector cooperation. We commit to being held accountable to our partners and stakeholders, and contributing to the continental agenda, through the Malabo CAADP framework. We will also measure our progress against the latter and support its specific targets of zero hunger, improved nutrition, climate adaptation, and ending poverty. AGRA will work closely with Africa Enterprise Challenge Fund (AECF), our subsidiary, and other key strategic programme partners to achieve impact and to maximize value.



2022 as a
Bridge Year

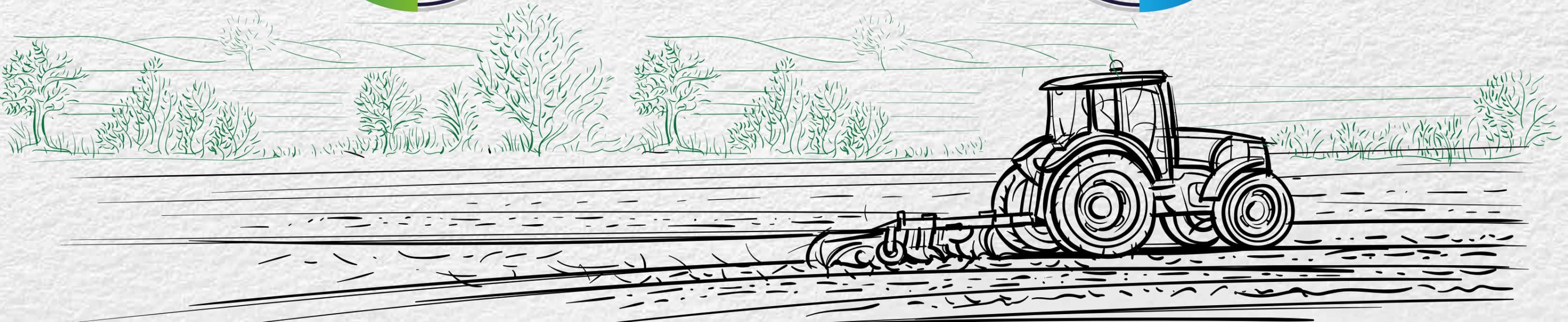
Objectives

Complete the 2023-2027 Strategy

- Programme coherence – ecosystem and stakeholder mapping, creation of new business lines, creation and refining of tools, models, and approaches for effective sector and country planning and implementation, interrogation and tracking of existing policies, digitisation
- Refining Catalytic Grants and Investments – identifying, validating and mobilising towards the most vulnerable aspects of food and seed systems, driving transformative cross-cutting interventions
- Positioning and Advocacy – convening and state intervention activities

2022 Key Achievements

AGRA's key focus and achievements in 2022 as pertains to food systems transformation included:



Food Systems

Climate-resilient Agriculture

The most prevalent challenges of our evolving times are Food Security and Climate Change. Hunger is a big problem for Africa, where more than one in five people faced hunger in 2020, and approximately 282 million people are undernourished. Many of these starving people are in the Horn of Africa, which is one of the most food-insecure regions worldwide. Spanning eight countries- Djibouti, Ethiopia, Eritrea, Kenya, Somalia, Sudan, South Sudan, and Uganda- with a combined population of 160 million people, nearly 44% of the region's population live in areas that are highly susceptible to severe food shortages.

This is due to a combination of, among other issues, drought, poverty, conflict, environmental degradation, and stagnant agricultural development. Given that much of the food supplies in these developing nations are locally-sourced, relying heavily on rain-fed agriculture, any shifts in rainfall patterns or temperature significantly impact food production and availability. It is in response to such complexities that the 2021 UN Food Systems summit called for a fundamentally different approach to food systems, in favour of one that takes into account the true values and full costs involved in growing, distribution, and consumption of food. This recommended approach is sustainable, nature positive and builds resilience.

Sustainable Food Systems: The Remedy

So far, efforts to increase food production as a means of improving food security without proper supportive measures have ended up in a catastrophic environmental effect. This is because food production in sub-Saharan Africa is largely dependent on land area, the expansion of which has led to encroachment into wetlands, forests, protected areas, and fragile ecosystems. Transformative change, on the other hand, demands a reduction of the continent's over-reliance on area expansion as the main source of food production growth and the termination of the precarious over-dependence on imports as a source of food at the expense of regional trade and national self-reliance.

In 2022, we deliberated on the changes would solve the multiple but cross-linked problems that plague Africa's food systems. We analysed how to ensure the sustainable use of the natural, often non-renewable resources that food systems rely on at every stage, as well as the use of technologies that do not weaken the natural environment (e.g., through excessive greenhouse gas emissions, water pollution, soil erosion, soil nutrient depletion, etc.). The objective is no less than providing safe, healthy, and affordable food for all - without compromising the health or welfare of future generations.

We also explored the alignment of policymaking and implementation as a critical cornerstone of food systems transformation. Because of the interconnectedness of food systems, policies have a ripple effect across the various segments and implications that are beyond their immediate objectives. We found that as policies are largely made in isolation, they often do not integrate efforts across national governments, regional bodies, agricultural research institutions, and the private sector.

Lastly, we studied climate-resilient agriculture in view of its position in achieving the aims of sustainable intensification, which include increased productivity, enhanced resilience (adaptation), and reduced/removed GHG emissions (mitigation), where possible.

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From a “Green Revolution” to sustainable food systems

AGRA is a learning organisation whose work depends on deep and robust partnerships. By following national priorities, we ensure that our work is sustainable in the long term. Our new strategy, therefore, aims to help governments tackle hunger and poverty by strengthening Africa’s food systems, which have been devastated by a decade of multiple crises including famine, droughts, and other effects of climate change; as well as the Covid pandemic, fall army worm infestation, soaring global food, fertilizer and energy prices; and far-reaching international conflicts, notably the war in Ukraine.

Because of this need to reorganise and recalibrate, the acronym AGRA and the ‘Green Revolution’ it stood for no longer describe fully the purpose and identity of the organisation. It is for this reason that AGRA is no longer an acronym but a name, an identity. AGRA now stands as a call to action for sustainable food systems, and as we extend our influence on food systems, we will be looking to ensure that our new brand continues to articulate the AGRA value proposition.

Building sustainable, inclusive, and resilient food systems Africa Agriculture Status Report (AASR)

To initiate a solid base for national governments recovering from the shocks of the last three years, AGRA, contributing institutions, and partners prioritized an evaluation exercise, whose outcome is a report that gives governments, donors, non-governmental organizations (NGOs), and the private sector insights into megatrends. The annual document, branded the Africa Agriculture Status Report (AASR) aims to catalyse leadership and coordination, mobilise financial resources, and develop capacity and capabilities.

With an emphasis on a holistic approach, the 2022 AASR, under the theme, Accelerating African Food Systems Transformation, analysed how countries can be supported to transform pathways into strategies and operational investment plans that support the food systems transformative agenda in a joint multi-stakeholder and multi-sectoral way.

Seed Systems

Through our legacy investments (those spanning 10 to 20 years) we have gained a wealth of knowledge on this critical component of agriculture transformation. With its partners, AGRA has developed a strategy that is based on two tangible assets – the Center of Excellence for Seed Systems in Africa (CESSA), and the Seed Systems Assessment Tool (SeedSAT). These important tools are meant to support the government and guide the private sector, addressing the seed system as a whole. This will lead to national investment plans that can transform national seed systems to be fit for purpose.



The Center of Excellence for Seed Systems in Africa (CESSA)

The Center of Excellence for Seed Systems in Africa, which was launched in 2021 to champion the development of quality seeds in improved varieties, commenced operations in 2022. It is now supporting governments, the private sector, and development partners to deliver modern, effective, and resilient seed systems that serve African farmers. The CESSA is adapting to its role of strengthening the seed value chain, particularly through variety development and release, production and distribution of both early generation and certified seed, farmer awareness creation and participation, quality assurance, national planning, policy and regulatory frameworks. All these tasks will help countries implement their long-term plans for seed development. This means that when countries are structuring their budgets, they can access information for base questions such as: What should our seed strategy be? What is our national agriculture investment plan? How much do we allocate to Research & Design? How much of that is towards seed Research & Design and its extension?

Where deeper information is required, governments can receive further advisory services for fully curated and country-specific insights. This harmonized approach can empower countries to funnel resources or guide donors to invest in the components that are most important.

Seed Systems Assessment Tool (SeedSAT), the diagnostic tool for seed systems

AGRA is promoting its first flagship program, SeedSAT, an assessment tool that can analyse the health of a country's seed system.

The tool has already been used in Ethiopia, Ghana, Kenya, Malawi, Nigeria and Uganda, with Tanzania set to join the list in 2023. External experts can access data from the initial scoring that has been collected, curated, and anchored on the digital SeedSAT platform, while governments can access country reports detailing gaps, especially in the challenging areas of National Planning and Coordination, Early Generation Seed and Quality Assurance, and the proposed recommendations for six countries.

Countries own the analytical process and they can reference its information and data when formulating own country strategies and designing country implementation plans. SeedSAT is also a preliminary government resource mobilization tool that supports effective planning.



“
The tool has already been used in Ethiopia, Ghana, Kenya, Malawi, Nigeria and Uganda, with Tanzania set to join the list in 2023.
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Digital agriculture: Disruptive innovation in agricultural communications, information, and supply chains

The rapid adoption of mobile phones and the increase in internet connectivity has accelerated the distribution of agricultural services, and access to knowledge, markets, and farm tools by farmers and other value chain actors. On top of this, the Covid-19 pandemic provided a unique opportunity to fast-track the use of contact-free digital solutions across all sectors- including agriculture. These digital agricultural innovations (classified into digital advisory and extension, financial access, digital farm tools, and online market linkage solutions) deliver real-time advice to farmers through intuitive multimedia formats and often in local languages, for a small fraction of the cost of traditional extension services.

Farmers now have unprecedented access to critical information such as weather forecasting, pest and disease surveillance, the latest animal and crop husbandry techniques, and market intelligence.

Going forward, AGRA aims to help hasten investment in communication infrastructure in rural areas, increase public investment in national agriculture Research Development & Extension (RD&E), strengthen state capacity to adapt digital innovations to local contexts, increase availability of locally and evidence-based guidance that is truly useful to farmers, and support greater oversight on content targeted at smallholder farmers. Governments and development partners will also play a key role in decreasing digital poverty, so as not to leave behind underprivileged members of society i.e., the poor, rural dwellers, the elderly, women, and persons with disabilities (PWDs), who may lack access to information and communication technologies.

Tracking Inclusive Agricultural Transformation (IAT)

The **Inclusive Agricultural Transformation (IAT) benchmarking tool** was designed for assessing the status of agricultural transformation in Africa. It came about because we noted that efforts to drive transformation, and the effectiveness of policy instruments in catalysing inclusive agricultural transformation are often inhibited by a lack of frameworks, effective identification of gaps, assessment of investment priorities, and setting clear targets .

Created in collaboration with the Economist Intelligence Unit (EIU) of the Economist Group, the IAT provides a comprehensive guiding framework for analysing the complex agricultural transformation landscape, identifying the key drivers, and building blocks, and identifying interventions and investment areas that can be prioritized by public, private, and donor investors and partners.

AGRA has gone on to pilot this evidently crucial tool in 15 countries namely Burkina Faso, Ethiopia, Ghana, Cote d'Ivoire, Kenya, Malawi, Mali, Morocco, Mozambique, Nigeria, Rwanda, Tanzania, Togo, Uganda, and Zambia.

AGRA's work in Regenerative Agriculture

Regenerative agriculture presents an opportunity to tackle and fix challenges plaguing our food systems, safeguarding both human and environmental health maintaining the current and future integrity of global ecosystems. In this pursuit, AGRA in partnership with the IKEA Foundation began collaborating with the Cereal Grower's Association and Farm Africa in implementing a project that seeks to promote regenerative practices as a way of building the resilience of farmers and their environment to the negative effects of climate change and land degradation in Embu and Makueni counties. The project specifically aims to contribute to food security and to building a sustainable market led agriculture systems that meet the needs of local communities whilst contributing to national development goals.

Regenerative and sustainable farming practices are thus forming the central tenants of AGRA's implementation strategy. It is part of an agriculture transformation that not only looks at yield enhancements but of certain crops but overall farm and landscape productivity that seeks to break the poverty cycle that most rural communities find themselves in.

Strengthening Resilience through Agroforestry

Over the last few years, there has been an increase in temperatures, changes in rainfall patterns, as well as more frequent and extreme climate events (floods and droughts). Aside from that, there are strong demographic pressures that has led to local communities resorting to unsustainable land and farm practices. These factors have led to depleted natural resources, biodiversity loss and land degradation, making the land unproductive and unable to sustain life.

AGRA's work in 8 regions of Burkina Faso has focused on increasing the capacity of small holder farming households and agricultural systems to better prepare for and adapt to shocks and stresses through agroforestry practices. Agroforestry plays a pivotal role in bolstering the resilience of agricultural systems, offering a powerful approach to enhance sustainability and adaptability in the face of environmental challenges. By integrating trees with traditional crops and livestock, we are supporting the resilience of 210,000 smallholder farmers in Burkina Faso through increased maize, sorghum, rice, and cowpeas productivity through such agroforestry practices, as well as focusing on improving and diversifying the income and nutrition of 5,000 rural women and youth. Thus, creating multifunctional landscapes that thrive in diverse conditions.

“

80%

of Burkina Faso's population

lives on agriculture and livestock, although they are particularly vulnerable to climate change due to their proximity to the Sahara Desert.

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Inclusive Markets *and trade*

AGRA's market-shaping interventions seek to unlock regional trade market opportunities for smallholder farmers across East and Southern Africa. Creating structured trade channels that link smallholder farmers to regional markets through commodity aggregators and processors entails the following: evaluating sourcing from smallholder farmers, determining the platforms that can effectively support the scaling of food processing within countries and regions, identifying the necessary subsidies for smallholder farmers to become attractive suppliers for food processors, and assessing the sustainable support that food processors can extend to farmers.

During 2022, the Market Shaping work stream prioritised:

- Mapping and consultation with the key stakeholders involved in inclusive markets and trade and refining value drivers and value chain criteria.
- Upgrading the rice value chain in East Africa using rice processors as an entry point to spur the creation of jobs along the supply chains and increasing the quantity of local rice traded in domestic and cross-border markets.
- Developing a proof of concept on the food processing industry being an effective entry point for building inclusive, competitive, and resilient market and trade systems, as well as providing technical assistance on the 'Food Balance Sheet' as a tool for informing decision-making by eastern and southern Africa (ESA) governments, private sector actors, and donors. AGRA also sought to understand to the extent to which food processors can present a lucrative market that is accessible to smallholder farmers.
- Developing a business case for our gender-forward VALUE4Her platform as a link for women to markets, finance, and trade, and developing business cases for high-impact market institutions (including a review of market platforms, assessment of various models, and development of a policy predictability tool).
- Supporting de-risking and cost-reducing models, as well as facilities that incentivize financial institutions to provide the necessary lending support, including input finance projects in Burkina Faso and Malawi, a trade credit guarantee in Mozambique, and a blended finance model in Ghana.
- An Environment and Social Management System (ESMS) capacity building and implementation in West Africa (Burkina Faso, Ghana, and Nigeria).

// Developing a business case for our gender-forward **VALUE4Her** platform as a link for women to markets, finance, and trade, and developing business cases for high-impact market institutions //



Proof of Concept on Food Processing

The purpose of this Bridge period study was to develop a feasibility product for the food processing industry, focusing on transforming low-margin crops into high-value products that improve the nutrition and income of farmers.

The study, carried out in Zambia, addressed several key questions, including effective support for agro-industrialization, sustainable support from food processors to farmers, the pros and cons of sourcing from smallholder farmers, the subsidies needed to make smallholder farmers attractive to suppliers, and platforms for scaling food processing. It analysed the performance, challenges, and opportunities of the Zambian agro-processing industry, as well as macro-economic factors and trends shaping agriculture and food systems in Zambia. It also identified three investment areas to enhance the performance of the agro-processing industry.

Financial and operational performance

- Continued support in expanding the revenue base through market landscaping, developing sales and distribution channels, and investing in R&D for new products and services
- Support to optimise operations through tailored operational support (e.g., supply chain management)
- The consideration of the target audience (TA) relating to investment readiness support to help clients develop investor-facing materials such as pitch decks, business plans, and financial models
- Promote broader industry-level initiatives to attract new investors and facilitate matchmaking, and work with commercial banks to design fit-for-purpose products

Employment generation

- Support to develop and implement gender inclusion strategies, understanding their importance and contribution to medium-to long-term business growth
- Consider sponsoring internship opportunities and/or strategic partnerships to include women in the agro-processing sector

Inclusive sourcing and nutrition

- Support to design and implement financially viable inclusive sourcing schemes with smallholder farmers, focused on demonstrating the business case for making such investments
- Improve raw materials sourcing to increase capacity utilisation
- Launch demand-driven nutritious food products for local markets, including those designed specifically for base-of-the-pyramid consumers (e.g. small package sizes, popularly consumed foods)



Theory of Change + Theory of Action for Inclusive Markets & Trade

By assessing different delivery models and market institutions, AGRA identified concrete opportunities for the next strategy implementation i.e., building inclusive and resilient domestic, regional, and intra-African agricultural markets.

We examined various value chains and market corridors in East, West, and Southern Africa, prioritising those with the potential for inclusiveness, competitiveness, and trading. We then identified several systemic barriers, including poor quality standards, post-harvest losses, limited value-addition, unorganized farmer groups, lack of support for informal markets, limited access to finance, and trade barriers. We also reviewed the business models and programs used by AGRA's partners and documented successes, challenges, and the projected support needed for future scale-up.

Based on the assessment, several priorities were identified. High-priority market linkage models and standards include working with large companies, SMEs, farmer organizations (FOs), and programs targeting women and youth. Improving the enabling environment for trade was also highlighted as a priority, specifically in policy harmonization, advisory services, advocacy, capacity building, and support for informal trade.

The refined theory of change, therefore, outlined three pillars of focus:

- **Pillar 1:** Support and facilitate the deployment and scale of inclusive business models efficiently linking farmers to output markets
- **Pillar 2:** Promote access to finance and other services, enhancing the competitiveness of agri-food market actors
- **Pillar 3:** Foster the development of a predictable, inclusive, and enabling policy and business environment for trade.



Economy-Based Market Linkages

Nascent Economies – weak private sector, strong government

e.g., Burkina Faso, Ethiopia, Mali and Mozambique

- Facilitate physical match-making platforms and institutionalize with a local owner (e.g., government or Agri-food Industry Organisations - AFIOs);
- Support(digital) public-sector platforms and village-based advisors (VBAs) as last-mile aggregators; and link with seed sector coordination and planning units (Seeds for markets);
- Partner with governments and regional trade associations to develop and maintain a regional/national food balance sheet and relevant market information systems.

Transitioning Economies – upcoming private sector e.g.,

Malawi, Rwanda, Tanzania, and Uganda

- Facilitate targeted physical match-making platforms and institutionalise with a local owner, preferably a government or AFIO (e.g., for soy in Rwanda with a focus on regional trade);
- Promote existing digital platforms;
- Link more smallholder farmers to existing promising digital platforms, AFIOs and inclusive businesses.

Industrializing Economies – strong private sector e.g.,

Kenya, Nigeria, Ghana, and Zambia

- Promote increased adoption of existing technologies by smallholder farmers through off-takers focused on seed, soil fertility, postharvest handling;
- Promote the use of digital solutions while continuing to facilitate targeted match-making platforms (e.g., cassava in Ghana) and institutionalize these with relevant market actors (e.g., AFIO).



Gender and *Inclusion*

// a **gender integration strategy and policy brief in Seed Systems** were developed and translated into objectives, with specific programmatic interventions that AGRA and actors in seed systems will implement during 2023. //



Building on the gender and youth inclusivity progress made in 2021, AGRA's goal for 2022 was to enhance our influence by refining the design of thematic programmes, and the tools and methodologies utilised for engagement.

Our work was organised into three primary bands:

i) **Anchoring inclusivity and equity in AGRA's workstreams:** Addressing the systemic barriers of both gender equality and the intersectional inclusion of women, youth, and disadvantaged smallholder farmers, while seeking equity in benefits and accountability- for shared prosperity and improved food security on the continent.

Interventions:

The Seed Systems work stream, through the CESSA, is including gender-related indicators in its SeedsAT to identify gender gaps in access to and usage of high-quality seed by female farmers.

The Policy and State Capability team has created an assessment framework on governments' readiness to create an enabling environment for gender equal agricultural policies, which will guide AGRA's work with governments and ensure a more gender-equal set of policies and regulations.

The Sustainable Farming work stream will support female village-based advisors (VBAs), and boost its positive impact on female farmers by developing a gender strategy for VBAs.

ii) **Women in entrepreneurship and markets pathway:** Continued support in addressing the gender barriers to women's agribusiness enterprise growth and market integration, while leveraging the power of digital technology to facilitate networks and the delivery of integrated business solutions and services to women-owned or led agribusinesses.

a) The **VALUE4HER** platform has witnessed a steady increase in membership to 3,009 members up from 2,072 at the end of 2021, including approximately 56 partners and service providers in 39 countries. To prepare it to scale even further, AGRA commissioned a study to establish a business case that provides a clear investment plan, a clear monitoring and evaluation plan, the institutional and resourcing requirements, and an exhaustive staffing model. Using the insights from the landscape analysis that informed the business case, the revamped VALUE4Her model will :

- Transform the digital platform into a match-making tool, with tailored business services and gender-progressive service providers offering services grounded on the platform's business model.
- Build a network that impacts 113,000 women agripreneurs on the VALUE4Her digital platform, allowing 24,000 businesses to grow into the next size segment, and linking 6,000 women's agribusinesses to market and trade opportunities, while impacting the 790,000+ smallholder farmers across Africa that those agribusinesses reach.
- Increase annual investment from \$3.5 million to \$14.4 million over the 2023-27 period, with the cost per agribusiness served going from \$244 to \$127 per agri-preneur.
- Systematically work towards a platform sustainability model, starting with partner-funding at the beginning of implementation, and ending in an established hybrid model that increases its sustainability.
- Build critical mass by reducing barriers to the VALUE4HerConnect platform, take a phased by country approach and scale to seven countries. Strengthen the capacity of women and youth agribusiness networks/platforms to increase their capacity and voice in policy development, create a business enabling environment, and adopt and scale models for women and youth-inclusive market linkages and/or business models.

b) **Women to Women Supply Chain Programme (WOW)** is AGRA's women-inclusive supply chain programme that was launched in December of 2021. The programme aims to catalyze, incubate, and consolidate the approach for women to women supply chains and leverage, connect, and integrate women across micro, meso and macro levels of agribusiness. The 2022 WOW innovation match grant of US\$ 9,000 was awarded to 19 women owned/led SMEs and through the supply chains of staple food crops, each connected with approximately 20 micro and nano agri-enterprises. The intervention showed that small matching grants can go a long way in enabling access to mechanised tools by women SMEs, allowing efficiency, increasing processing capacity, and reducing the labour associated with farm production and post-harvest management for smallholder farming women. It also showed the need for spousal engagement and male champions at the community level to address the issues and barriers for women.

c) **Phase 2 of the ARISE - Women Business Leadership Programme** was designed during the Bridge year as a way of refining the existing training model. The iterated programme will include

iii) **AGRA's institutional capacity for gender responsive programming includes:** Conducting a deep analysis of the issues, challenges, and opportunities relating to youth employment, and existing government policies and strategies on youth empowerment, whose findings will inform the development of a comprehensive strategy from a continental landscape.

training and support on the investment closing process and institute a business management capacity training "toolkit" for new VALUE4Her members attempting to access finance and investments.

d) The **VALUE4Her Women Agripreneurs of the Year Awards (WAYA)** recognises African female agripreneurs that have excelled in the agricultural value chains and demonstrated remarkable innovation in food security, climate resilience, women, and youth empowerment. In its second edition (WAYA 2022), a total of US\$ 85,000 in grant funding was bestowed to winners at the First Ladies' Special Event at the Africa's Food Systems Forum (then AGRF) Summit in Kigali, Rwanda. The winners stood out among 1,478 applications from 38 African countries; the included Fatou Manneh, Founder, Jelmah Herbella (The Gambia) in the Young Female Agripreneur category; Uwintwari Liliane, CEO, Mahwi Tech (Rwanda) as the Female Ag Tech Innovator of the year; and Céilia Chabi, CEO, Kiel Bien-Être (Benin) in the Outstanding Value Adding Enterprise category. **Oluyemisi Iranloye**, the Managing Director, of Nigeria's Psaltry International took home the Grand Prize.

Activities

- A gender analysis of the seed systems was done in collaboration with the High Lands Centre of Leadership for Development (L4D)[4] to identify disparities and gender gaps in the national seed systems of Ethiopia and Nigeria. The study substantiates that seed systems are not sufficiently gendered, as most female farmers face constraints in purchasing seeds and complementary inputs for achieving high yields. However, to address these gaps, which inevitably affect women's access, a **gender integration strategy and policy brief in Seed Systems** were developed and translated into objectives, with specific programmatic interventions that AGRA and actors in seed systems will implement during 2023. The identified priority investment areas were; supporting CESSA to design systemic interventions that bridge seed access gaps, effective mainstreaming of gender indicators and capacity of seed institutions to collect and report gender disaggregated data, and catalytic investments to complement the CESSA grants that fill gender gaps.
- AGRA and IGNITE, through its measurement partner 60 Decibels, conducted research in Burkina Faso and Nigeria to establish the effectiveness of VBAs from a gender perspective. The actionable insights from this have promoted better support and recruitment of female VBAs and better support of the female farmers the VBA model is reaching.
- AGRA engaged MicroSave Consulting to establish the extent to which governments in Ghana, Kenya and Malawi are creating an enabling environment for gender-intentional agricultural policies. They wanted to understand how these governments collect, analyse, and utilize sex-disaggregated data for agenda setting, investments, decision-making, and accountability mechanisms ensuring that women and youth agendas are planned for, integrated, and executed. The exercise helped familiarize AGRA on current government efforts in gender and inclusion, and include key priorities and interventions into the next strategic plan.
- A senior gender-integration staff was recruited to AGRA's gender unit, a staffing model developed and a total of 55 (29F:26M) AGRA staff taken through basic gender training. Attendees included country heads, Small Producer Organisations (SPOs), Producer Organisations (POs), Associate POs, grants officers and Monitoring and Evaluation (M&E) officers .



Investments- Catalytic Grants and *Blended Finance*



During the period in review, we took time away from our paused programs and activities to do a deep dive of our ecosystem. We felt that it was imperative to compile the learning documents that were reflective of the past but would also inform the organisations realignment. The exercise helped us know if in over 15 years of financing we had managed to improve the access to markets and finance solutions. The task also showed us which of our targeted stakeholders had benefited the most from our de-risking initiatives, and more importantly, it provided an opportunity to know if these systems would endure without AGRA's guiding presence.

Our review found that many of AGRA's investments were necessary in mitigating the barriers to finance that still exist today, such as the reluctance of financiers to increase their agriculture portfolios and policies that negatively influence how governments intervene in agricultural finance. Notable findings included:

- An Africa-wide system to measure the performance of SMEs and formal-based organisations that AGRA invested in helped provide more clarity on their progress over time and the impact of external financing on their processes.
- The championing of government subsidies towards inputs, fertilisers and equipment was also critical in helping increase farmers' ability to afford them.

Blended Finance:

Unlocking, Catalysing and De-risking Agricultural Finance

To effectively scale our financial facilities and strengthen our agricultural finance systems, moving forward, we chose to pursue a blended finance approach that includes catalytic investments i.e., risk tolerant and flexible funding, digital solutions and alternative lending models.

Towards this approach, our 2022 activities prioritised:

- Leveraging partners, governments and financial institutions to increase the supply of capital, grow the number and volume of agricultural finance deals, and provide grants that would kick start blended financial instruments
- Incentivising the private and public sector to build systems that would facilitate knowledge-sharing, support service and digital innovations, and foster youth and gender specific entrepreneurship
- Utilising public funds to reduce the risk in financing the sector by co-designing blended finance vehicles and deploying models that share the investment risk

On our end, by putting concerted efforts towards sustainability and scalability we managed to make 'opportunistic' investments across the ecosystem through:

- Financial Inclusion for Smallholder Farmers Program (FISFAP) – a dedicated program to enhance financial inclusion of smallholder farmers in Ghana, Kenya and Tanzania, using digital channels and solutions.
- Programme for Rural Outreach of Financial Innovations and Technologies (PROFIT) and Ghana Incentive-Based Risk Sharing System for Agricultural Lending (GIRSAL) programs to de-risk agricultural lending by banks in Kenya and Ghana respectively.
- Agri-Business Capital Fund (ABC Fund), an innovative blended finance fund for Agri SMEs and rural financial institutions across Africa.
- Ecosystem innovations to test new (lending) models and tools that aim to reduce cost and risk of Agri SME lending.
- Catalytic investments in blended finance institutions such as Agricultural Finance Corporation (AFC), Malawi Agriculture and Industrial Investment Corporation (MAIIC), Business Development Fund (BDF), Uganda Development Bank Limited (UDB), Banque Agricole Du Faso (BADF), GIRSAL, and Global Aquaculture Performance Index (GAPI).

// Financial Inclusion for **Smallholder Farmers** Program (FISFAP) – a **dedicated program** to enhance financial inclusion of smallholder farmers in Ghana, Kenya and Tanzania, **using digital channels** and solutions. //

Economy Based Curation

AGRA has the tools to filter, validate and collate the data that would guide government investments in agriculture. We have taken this a step further to include curated interventions based on each country's economic capacity.

- **For Nascent Economies with an uninvolved private sector but strong government e.g., Mali, Burkina Faso, Ethiopia, and Mozambique**, we aim to support governments in improving the overall investment environment and pass legislation that enables the creation or scaling of inclusive sourcing models.
- **For Transitioning Economies with the upcoming private sector e.g., Malawi, Rwanda, Tanzania, and Uganda**, AGRA will provide technical assistance for the growth of successful finance and Business Development Service (BDS) models, and affordable working capital solutions for SMEs and local Financial Service Providers (FSPs). AGRA will also explore and implement price stabilization mechanisms and create additional incentives for local sourcing.
- **For Industrializing Economies with a strong private sector e.g., Kenya, Nigeria, Ghana, and Zambia**, we can influence the replication of successful models, link high-potential SMEs with agriculture-sector friendly financial institutions and partner with governments to pass legislation that incentivizes local sourcing, inclusive finance and business models.

Financial Bridge interventions across business lines

Seed systems

Goal: Enhance access to finance for seed companies

Interventions:

- Invest in "Seeds for Markets" by creating a demand for preferred seed varieties in the market and increasing the finance-ability of seed companies
- Help build the capacity of implementing institutions to service seed companies
- Use a standard performance measurement tool for seed companies
- Use grant funds to unlock private funds: every USD 1 that AGRA spends should activate at least five times the amount in private sector investments
- Incorporate accounting mechanisms (e.g., True Cost Accounting) that help us better understand the true value of food and hence rally efforts towards addressing the environmental, social, and health costs as well as the unintended consequences associated with the production, distribution, and processing of food.
- Enable investors, asset managers, farmers, and other stakeholders opportunities for 'true value' investing in aligned food enterprises

Sustainable Farming

Goal: Enhance access to finance for inputs

Interventions:

- Partner with Financial Service Providers (FSPs) to scale agro dealer and village-based advisor (VBA) finance models in an inclusive manner
- Develop business cases for financial products eligible for 'Green and Climate Finance.' Climate finance seeks to support mitigation and adaptation actions that address climate change whereas Green finance mobilises towards sustainable development priorities
- Support agricultural insurance actors (Pula and ACRE) to de-risk input finance

Inclusive Markets & Trade

Goal: Enhance access to finance for SMEs

Interventions:

- Improve markets (through innovations) for financial and non-financial service delivery to SMEs
- Partner with FSPs to scale SME finance models and FSPs' access to de-risking facilities
- Partner with Business Development Service (BDS's) providers to improve their capacity to enhance bankability of SMEs

Policy and State Capacity

Goal: Enhance Agricultural finance

Interventions:

- Promote blended finance to enhance the effective use of public funds in advancing agricultural finance
- Support policy reforms to address regulatory barriers in agricultural finance
- Promote Kampala principles to improve coordination of public support for agricultural finance





Grants and Resource *Mobilization*

Throughout the review period, AGRA planned to award 61 investments worth USD 16.65 million, implement 51 consultancies worth USD 14.02 million, and 10 sub-awards worth USD 2.63 million, all of which we achieved. Programme Innovation and Delivery (PID) absorbed 86%, Strategic Partnerships 10%, and Policy and State Capability (PSC) 4% of new grant commitments for the year. These catalytic investments were geared towards activating systems and developing vibrant value chains.

In the course of the year AGRA disbursed USD 15 million; regional grants were allocated 30%, while country grants took 31% (Ghana - 18%; Nigeria - 13%). The 116 active grants we processed averaged USD 46K per disbursement.

The grant turnaround time also significantly improved from 60.2 days in Q2 of 2022 to an average of 41 days. We ensured that grantees were moving onto implementation and development as quickly as possible.

Bridge Initiatives and Investments

Towards the new business lines and the sustainability of existing grant investments, we focused on supporting aligned initiatives. The grants for these bridge initiatives totalled USD 2.5 million with 9 grant award letters issued to deserving implementing partners, and USD 2 million in disbursements (80% uptake). We are optimistic that the results from these grants will impact countries and inform the thematic implementation plans for our 2023-2027 strategy.

Bridge investments also prioritised projects that strengthen the capacity, reach and efficiency of the last-mile delivery systems, investments related to the development of approaches, models and guidelines and carbon financing.

Policy and State *Capability*

Our work in 2022 was heavily centered on developing AGRA's modes of technical assistance. An emerging prerequisite from the evaluation of the outgoing strategy was the development of tools, models, approaches, benchmarks, frameworks and baselines that give realistic indications and insights of policy and regulatory work in AGRA's focus countries.

As a result, we embarked on the development of an internal-and external-facing policy tracker to communicate important information to governments, partners, stakeholders, and other end users. We also worked on the development of an upgraded policy practice tool to support policy implementation under the CAADP's Biennial Review (BR) process and policy benchmarking support in partnership with the World Bank. Benchmarks, data, and baselines were developed to deepen our knowledge and understanding of definitions, domains, measurement indices, determinants of system health, and how to track the progress of policy interventions and their impact on different systems, (such as markets, seed, fertilizer, finance, and extension).

We also developed policy predictability mechanisms, including 11 investments and initiatives that contribute to the transparency and predictability of government policies that unlock and promote regional food trade.

Our Bridge activities under this Policy and State Capability work stream also focused on:

Development of Tools, Models, and Approaches

- AGRA has been working on a Policy Appropriateness Index (PAI) platform intended to help governments, policy analysts and other stakeholders to better navigate agricultural policies, assess the policy landscape, and benchmark performance. The tool will allow for the valuation of relevance, effectiveness, and comprehensiveness of existing policies and can integrate with an electronic policy tracker tool that allows for the real time monitoring of progress in specific policy and regulatory reform processes. Additionally, the platform is tailored to consolidate AGRA's policy and regulatory reform work by putting the regulatory gap analysis, the policy e-tracker, and partnership tracking platform on a single location with a dashboard that captures the country and continental policy frameworks, respectively. The evolution of the PAI platform is showing great promise, with positive implications for the partnership between AGRA and the Africa Union Development Agency (AUDA). The work has moved into a retrieval stage where teams will visit the five pilot countries i.e., Ethiopia, Ghana, Kenya, Malawi and Nigeria to gather policy landscaping data and populate the platform.

Regulatory gap analysis and policy prioritisation

- AGRA commissioned work to assess the status quo of agricultural policy and regulatory gaps for agribusiness investments in Nigeria, Tanzania and Zambia. The assessment sought to identify out-dated policies, missing legislation and gaps in regulation and over-regulation, among other issues. Where policies and regulations are in place, the assessment aimed to understand the factors curtailing the enforcement and implementation of policy reforms. This assessment birthed a replicable mechanism that can be used to identify and prioritize policy reforms for AGRA's new strategy. The wider application of the mechanism beyond the three pilot countries will be rolled out in a manner that ensures built-in capacity in managing the quality, consistency, verification, and validation of data. The expectation is to continue developing the approach, incorporate elements of governance, infrastructure, and other exogenous elements to respond to wider and critical food systems issues. The tool was assessed and validated by experts in respective countries and presented to stakeholders at the CAADP Partnership Platform event for further consultation and feedback.

Reworking models of policy implementation in countries

- To understand the factors that influence policy reform implementation, we conducted a scan of policies across several countries, such as Kenya, Malawi, Mozambique, Tanzania and Zambia. The key lessons we learned from this task is that beyond the reform of policies, donors, development partners, private sector and civil society need to continue their important role in supporting policy implementation. Good policy has to be underpinned by a clarity of purpose, clear and attainable targets, well-sequenced executable programmes; and should be implementable, within the bounds of resource limitations. We also saw that the common gap across all countries is a lack of clear M&E frameworks to assess policy implementation outcomes and results on a more consistent basis. Stakeholders have therefore been calling on AGRA to support structured engagement platforms and policy dialogues that convene government, state, non-state actors/civic groups, and private sector to facilitate the use of data and evidence for policy design and implementation.





Regional *Food Trade*

AGRA continued to implement the Regional Food Trade (RFT) Programme to stimulate an increase in regional food trade in sub-Saharan Africa (SSA) by: a) working with companies that source, process, and trade food in the region, to maximize investment, coordination, and benefits to poorer farmers, and b) contributing to the improvement of the transparency and predictability of government policies to unlock regional food trade. Some of the key highlights of our work in 2022 include:

- **Official launch of the Regional Food Balance Sheet covering six pilot countries and finalization of the national food balance sheet in Malawi**

The lack of transparency in agricultural markets is a pervasive problem that challenges farmers, traders, processors, investors, governments, and donors throughout Sub-Saharan Africa (SSA). The recent shocks from the COVID-19 pandemic and the Russia – Ukraine Crisis have further amplified the critical need for timely and reliable information on food availability, given the potential of these shocks to dramatically increase Africa's food insecurity through the imposition of adhoc trade restrictive policies such as export and import bans. To mitigate this challenge, AGRA, through COMESA, officially launched the digital Regional Food Balance Sheet at the AGRF summit in Rwanda in September 2022. Though in its early stages, the initiative is proving to be a reliable platform for governments and private sector to access timely and reliable data on production, commodity deficit/demand, prices and consumption in the region for evidence-based decisions on food security, and trade and private sector investments. COMESA Ministers in November 2022 undertook to promote the Regional Food Balance Sheet during the 8th Joint Meeting of the Ministers responsible for Agriculture, Natural Resources and Environment from COMESA Member States, held in Zambia. The RFT programme has also supported the Government of Malawi with the consolidation of the Malawi National Food Balance Sheet, which was finalized and published.

- **Development and publication of the Bi-weekly Policy and Price Monitor**

In response to the current Russia-Ukraine crisis, the RFT Programme in May 2022 rolled out the bi-weekly Policy and Price Monitor, which studies changes in food, energy and fertilizer prices amidst the Russia-Ukraine Crisis, and the different measures that governments, private sector and development partners are putting in place to minimize the impact of the crisis on their respective countries' food security. By the end of the year, a total of nine editions of the Price and Policy bi-weekly Monitor were published and widely circulated across the world as a way of strengthening food security and price monitoring mechanisms. The RFT Programme continued to publish the Food Security Monitor, which was introduced in 2021 to make data available to key stakeholders, including national governments, helping underpin evidence-based decision making. In 2022, 11 editions were published reaching over 168,500 people across the world between the months of August and December 2022.

// The Programme's market-shaping interventions seek to **unlock regional trade market** opportunities for **smallholder farmers across East and Southern Africa** by creating structured trade channels which **link smallholder farmers to regional markets** through commodity aggregators and processors. //

- **Support to the Malawi Government to operationalize policy instruments that underpin transparent and predictable food trade**

The RFT programme continued to support the Malawi Government in operationalizing the instruments that promote a more predictable and transparent RFT Policy environment. The Simplified Trade Regime (STR) framework, which enables increased small-scale cross border trade between Malawi and Mozambique was officially signed and is envisioned to boost regional trade and market opportunities especially for SMEs. The President of Malawi, H.E. Lazarus Chakwera, together with his counterpart from Mozambique, H.E. Filipe Nyusi, witnessed the signing ceremony of the Trade Agreement at Marracuene, in Mozambique in April 2022.

- **Support to improving compliance with maize quality standards for safe and efficient food trade in East Africa, focusing on private sector self-regulation for food safety**

The RFT Programme continued to support the development and implementation of private sector friendly standards frameworks to enable the smooth flow of safe foods along the east and southern Africa region. In 2022, the RFT Programme continued to address Aflatoxin contamination along the Tanzania-Kenya-Uganda trade corridors in order to increase the volume of quality compliant maize traded along the targeted corridors. By end of 2022, a total of 27,598 smallholder farmers were mobilized to participate in structured trade markets for maize, where over 12,000MT of quality compliant maize was traded along the selected trade

corridors. The programme also succeeded in reducing the percentage of grain rejections by off-takers by 50% within the targeted trade corridor.

- **Support to implementation of Mutual Recognition Arrangements as a key instrument for policy predictability for four high-trading commodities in at least four countries**

The RFT programme continues to provide support to COMESA to develop and implement the Mutual Recognition Framework (MRF) as a key instrument that NOT only supports a more predictable environment for regional food trade; but also, to provide some flexibility in reducing transaction costs. The project is piloted in six COMESA Member States (Kenya, Malawi, Rwanda, Uganda, Zambia, and Zimbabwe) for four commodities namely: maize, soybean, sorghum and groundnuts. In 2022, the MRF pillars, and Standard Operating Procedures (SOPs) for the four selected commodities were completed and validated; and these provided the necessary ammunition for the targeted countries to undertake bilateral/multilateral negotiations on the road to the signing of Mutual Recognition Agreements (MRAs). The National Technical Working Groups were also successfully established in three of the six countries, and will play a major role in ensuring that member states take ownership of the MRA agenda, including the provision of technical backing to Ministers and other political players to endorse and sign the MRAs in their respective countries.

Food Trade Coalition for Africa

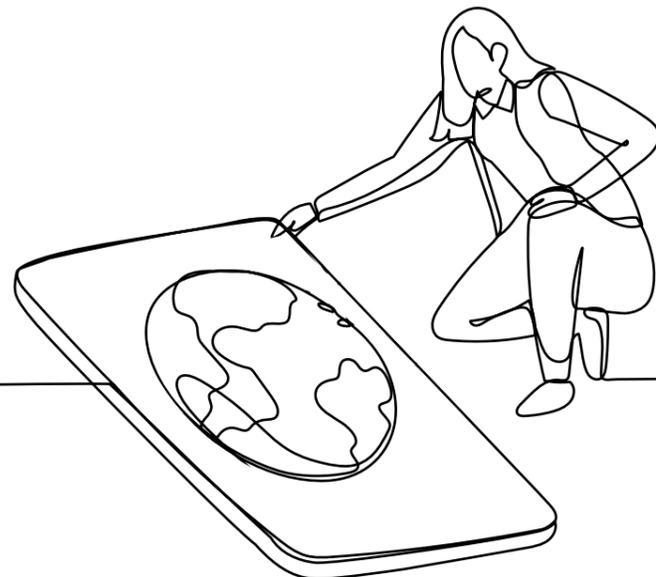
The RFT programme has been instrumental in shaping policy predictability through engagements under the Food Trade Coalition for Africa (FTCA), and its attendant thematic working groups around food safety, women in trade, food security, and trade logistics. In 2022, the Coalition strategically grew its membership bringing on board key players such as the African Continental Free Trade Area (AfCFTA) Secretariat, the United States Department for Agriculture, the World Trade Organization's Standards and Trade Development Facility among others. The strategic work of the Coalition also attracted the attention of the public sector which resulted in Rwanda's Minister of Trade and Industry, Hon. Jean-Chrysostome Ngabitsinze, requesting AGRA, through the Food Trade Coalition for Africa, for support in fulfilling his duties as the AfCFTA Secretariat Champion. This partnership will materialise in 2023, when AGRA will support the honorable minister in championing the development of the African Continental Food Trade Strategy.

The Africa Food Security Platform

In 2022, AGRA facilitated the establishment of the Africa Food Security Platform (AFSP) to provide more comprehensive, timely and accessible information for decision-making by public and private sector actors in the food system across the AU member states. Similarly, the Africa Food Security Technical Committee (AFS-TC) was established in 2022 largely drawing technical expertise from the institutional membership of the AFSP. The committee will generate data and undertake the analytics needed to support the work of AFSP in evidence-based based engagement on the continent's food and nutrition security matters with governments, donors and the private sector. The launch and convening of the first AFS-TC meeting is planned to take place in the first quarter of 2023 to define its agenda and modus operandi.

Market Shaping initiatives

The RFT programme's market-shaping interventions seek to unlock regional trade market opportunities for smallholder farmers across East and Southern Africa by creating structured trade channels that link smallholder farmers to regional markets through commodity aggregators and processors. In 2022, AGRA's work in market shaping contributed to the structured trading of over 68,000 MT of maize, rice, beans and cassava flour worth USD29 Million. The commodities were sourced from the Lake Tanganyika Region to other regional markets. Approximately USD9.5 Million worth of private sector investment was also leveraged in 2022 along the targeted value chains with the Rice Sector Business Association Limited in Tanzania investing in the construction of a new warehouse at the Mutukula border post, which serves Tanzania and Uganda.





Flagships, Initiatives/support *To Ministries of Agriculture*

Flagship programs are important tools for drawing investment in support of agriculture and food. It is, therefore, imperative that the tool is framed according to the needs of a specific development context, aligned with national needs, and priorities and synchronised with multi-level action and partnership.

The period in review prioritised customisation from the ground up, by analysing state capability indicators and expanding the flagship mobilisation vehicles that would facilitate developmental flagship programs. It also focused on accelerating sector expansion by providing bespoke support (diagnostic, advisory, developmental, enhancement and enforcement) across all agricultural systems, and the use of a remote delivery model to support governments.
Diagnostic - Improving Baselines

Diagnostic - Improving Baselines

To determine the status of AGRA's focus countries with respect to the state capability indicators, we gathered information from eight countries (Burkina Faso, Ghana, Kenya, Malawi, Mali, Mozambique, Nigeria, and Tanzania) using the Government Readiness for Agricultural Transformation (GRAT) tool that was developed in the previous year in partnership with the Tony Blair Institute. This yielded eight country reports and one country level synthesis report.
Advisory- Convening and Coordination

Advisory - Convening and Coordination

As a primary sector convener, AGRA prioritised the creation and expansion of flagship mobilisation vehicles such as steering committees, technical working groups and innovation platforms (for specific crops i.e., maize, soya and ginger). The Technical Working Group (TWG) on Agro industrialization in Tanzania, for example, is not only active but has been institutionalised as a thematic group under the Agriculture Sector Development Programme II (ASDP II) for its value addition and commercialization component.

AGRA also contributed towards sector-wide coordination, by leveraging the activities of the Agriculture Sector Working Group (ASWG) and the work of other Partnership for Inclusive Agricultural Transformation in Africa (PIATA) partners. Our State Capability and Partnership units additionally convened a multi-institutional team of actors in each country to prepare for the AGRF Deal Room. These activities fostered further collaboration and knowledge sharing among the pertinent partners.

Development–New Flagships

AGRA's State Capability Unit and Policy and Advocacy Unit embarked on a collaborative process to develop and position three new Food Systems Strategies and Investment Plans for Ghana, Rwanda, and Malawi. These strategies and plans have gone on to receive investment interest from the private sector and other actors, and due to their established coordination mechanisms, they are poised for optimal implementation. The joint units also supported the establishment of coordination and alignment frameworks (Technical Working Groups) in Burkina Faso, Malawi, Nigeria and Tanzania through continuous technical assistance (that included skills transfer for senior technical officers and institution leaders) and a co-created, joint implementation approach.

In addition, the joint units supported Ethiopia in developing a National Rice Flagship Program (NRFP), and finalising a flagship programme on Oil Seed and Animal Feed (OSAP). The programs were handed over to the Minister of Agriculture by AGRA's Board Chair in a ceremony attended by the government, development partners, civil society, and the private sector. As a follow up, other areas for flagship implementation support in Ethiopia were identified and included in AGRA's new strategy.

Nigeria – BAGS flagship off to a rapid start

In May 2022 the Kaduna State Council chaired by the governor, H.E. Nasir Ahmad El-Rufai, officially approved the Boosting Agricultural Gains and Services (BAGS) flagship program and provided a furnished office, accommodation and operational vehicles for the supervision, monitoring and sensitization of project activities.

The council also facilitated funding for the BAGS secretariat salaries and operations. The BAGS program is envisioned to improve the productivity and incomes of resource-poor smallholder farmers significantly and sustainably by enabling access to good seed varieties and healthy soils; access to markets, information, financing, storage, and transport; and policies that provide comprehensive support. The overall goal of the program is to enhance sustainable food and nutrition security, increase incomes, generate employment, and create wealth for the targeted beneficiaries across all the value chains.

The government through the Ministry of Finance has set aside 500 million Naira (about USD 1.2 Million) as supplementary budget for the implementation of BAGS. In total, over USD 20 Million has been mobilised from government, private sector and other development partners to support the success of the program.

The BAGS implementation framework is already providing a platform for knowledge sharing and ideation with various actors treating the challenge of limited physical interaction as an opportunity to embrace digital technologies. The commodity specific innovation platforms for maize, soya and ginger, established during the Bridge year, are already accelerating public – private sector dialogue thus enhancing value chain functions.

Malawi – Women and youth flagship creates new business linkages and enhances technology uptake

The Empowerment of Women and Youth in Agriculture Flagship Program aims to contribute to improved well-being and livelihoods of women and youth engaged in agriculture in Malawi by increasing their empowerment through enhanced engagement in priority agriculture value chains. This is projected to result in significant growth of the agricultural sector, increased incomes, and improved food and nutrition security for all.

The project will be implemented for a period of 10 years to ensure systematic phased rollout of sustainable inclusive empowerment interventions. It will reach almost 426,194 direct beneficiaries spread across all districts of the country.

Government commitment to the flagship is increasing and the private sector has demonstrated the willingness to participate in the implementation of the flagship; additionally, the Flanders government has shown interest in funding the flagship on a pilot basis and using it to leverage projects they support in the Kasungu and Mzimba districts.

Integral women-specific interventions under the program include establishing business linkages between input suppliers (seeds and fertilizers) and smallholder farmers through agro-dealers and facilitating the acquisition and consolidation of fragmented land holdings for effective production activities and finance access.

For the youth, a paramount intervention is establishing Digital Innovation Hubs based on existing technology infrastructure to boost youth agricultural enterprises. This will help the youth to become more competitive in their enterprise.

Tanzania – TAIDF expected to leverage USD2.7 billion in agro-industrial investments

The Tanzania Agro-industrialization Development Flagship (TAIDF) complements current and previous government efforts in promoting industrialization as a key driver of economic development and the path to Tanzania becoming a middle-income economy by 2025. This detailed implementation plan will enhance the structural economic transformation of agro-industrialization by improving agro-based economic growth that involves women and youth. It will also strategically support the development of the country's agricultural value chains in order to induce private sector investment towards agro inputs and value addition.

TAIDF interventions will be implemented in 16 regions based on the availability of raw materials, existence of necessary infrastructure, past investments in agro-industrialization on which to leverage, human population, market opportunities and connectivity to key consumption centres.

The Government and Development Partners will invest a total of USD 320 million during the first six years of TAIDF as seed money. In turn, the resources from the public sector are expected to leverage investments of approx. USD 2,669.1 million by the private sector, including farmers, primary processors and local and foreign agro-industrial investors.

An estimated 7 million households (about 32.2 million people) will benefit directly and indirectly from TAIDF by 2025. Additionally, 1 Million people (mainly women and youth) will access new employment opportunities in TAIDF related activities. Of these jobs, 100,000 will be in agro-industries (for input production and agro-processing) that will be built or rehabilitated under TAIDF.

Burkina Faso – Balanced meals for school children

AGRA is supporting a Burkina Faso Flagship titled "the Presidential Initiative to ensure each child of school age at least one balanced meal per day" as a technical assistant second to the Minister's office. The partnership has provided technical backstopping to facilitate implementation of this initiative and the development of a roadmap that integrates contract farming into the supply chain for school canteens.

The integration of local production into the supply system has facilitated market access and increase the income of local producers, while improving the availability of good quality agricultural products for school canteens.

The first 2022 ordinary sessions of the Technical Consultation Framework (CTC) showed growth in the collaboration capacity of institutional actors, enhanced understanding of the initiative by the new leadership (that AGRA had phased in after a transition), and emerging improvements in the governance of school canteens.

Ethiopia– Support to the National Rice Flagship Program

AGRA provided assistance in the delivery of the National Rice Flagship Program (NRFP) by supporting the rice technical secretariat (ST-DRiz), and refining the implementation road map by the Ministry of Agriculture and the Prime Minister's Office. The assistance included a feasibility study to support the registration of the rice flagship in the public private partnership pipeline within the Ministry of Finance, and a study on the possibility to substitute imported rice with local produced rice.

Ghana – Planting for Export and Rural Development (PERD–TCDA):

In Ghana, AGRA aided the Tree Crops Development Authority (TCDA) in the development of a framework to digitise TCDA value chain actors and stakeholders and in the development of a five-year strategic plan, in partnership with the International Finance Corporation (IFC).

The strategic plan, which was launched in July 2022, is a key resource mobilisation tool that has already enabled marked improvements in the delivery of TCDA's mandate. The tool will continue to help TCDA staff in the analysis of competitiveness and prioritization of processes.



Support-Flagship implementation:

To sustain momentum of flagship support work across all the highlighted countries, AGRA used evidence and convening meetings comprising the ministers of finance, agriculture, and trade and the private sector. These efforts were strengthened by evidence-based planning and prioritisation at country level and a learning by doing approach.

In addition, and to further reinforce capacity, for the high-quality evidence and analytical studies that help inform sector planning and priority setting, the PSC worked with organizations such as the Food and Agriculture Organization of the United Nations (FAO), Monitoring and Analysing Food and Agricultural Policies programme (MAFAP), Bureau for Food and Agricultural Policy (BFAP), Japan International Cooperation Agency (JICA), World Bank, local universities, as well as global think tanks.

MAFAP provided technical input into the design of the Ethiopia rice flagship design, while BFAP offered technical and analytical support to inform the design of the oil seed and animal feed flagship programme in Nigeria. The National Rice Sector Development Technical Committee (NRSD TC) was trained in evidence-based planning during its involvement in the design of the rice flagship for Ethiopia, and AGRA is working closely with FAO, MAFAP and the International Food Policy Research Institute (IFPRI) to support the BAGS flagship in Nigeria

Support - Business Development Services for Agri-SMEs

In response to a request from the President's Office - Regional Administration and Local Government (PO-RALG), AGRA engaged the Tanzania Association of Professional Business Development Service Providers (TAPBDS) to provide Business Development Services (BDS) to small and medium-sized agrifood enterprises in Tanzania.

Through the project, the government formulated a clear framework to guide and maximise the impact of the 10% local government loan fund for youth, women and People [living] With Disabilities (PWDs). The framework ensured that the fund could help boost investments in sectors where respective local government councils have comparative advantages, and catalyse the implementation of the Agricultural Sector Development Programme Phase II (ASDP II) and the Tanzania Agro-Industry Development Flagship (TAIDF).

Outside these country-specific interventions, AGRA endeavoured to design and develop financial products that are appropriate for agricultural SMEs, streamline a selection process for financial beneficiaries and build the business capacity of SMEs by appropriately skilling and coaching them to develop fundable business plans that could gain interest from financial facilities and navigate the procedures and requirements needed to access funds.

Tracking and Accountability

To support non-state actors in influencing government activities and holding governments accountable, AGRA:

- Developed a web tool to help governments track public and private sector investments in their agricultural flagship programmes. For maximum efficacy we organised capacity building activities for government and AGRA country staff. The tool, piloted in Tanzania and Nigeria, was tailored to address the lack of systematic approaches and institutional capacity to collect, document, manage, analyse and disseminate information on agricultural investment, sector processes and, more significantly, flagship programmes .
- Facilitated a database for sunflower oil processing companies/enterprises and their respective capacity in the country. A technical report was also produced and submitted to the Ministry of Agriculture.
- Provided technical assistance through an intervention named "institutional capacity strengthening for results-based monitoring and evaluation" at the Ministry of Agriculture in Tanzania. Additionally, with help from the Sokoine University of Agriculture (SUA), the Ministry developed a Monitoring & Evaluation framework and a digital Monitoring and Evaluation Information System (MEIS).
- Contributed to training events and various technical meetings in support of the African Union's Biennial Review Processes.

Meanwhile, AGRA conducted a stakeholder mapping exercise to assess key stakeholders in the advocacy space. The purpose was to unlock AGRA's internal capacity and expertise and foster collaboration with civil society and farmer organizations for policy reform work. The exercise aimed to identify and map AGRA's partners, influencers, and champions, develop a stakeholder register and influence matrix, and inform the execution of programmatic initiatives through an advocacy strategy.

The ensuing results highlighted the need for improved visibility of AGRA's policy reform work, increased knowledge sharing with local stakeholders, and the development of a comprehensive advocacy strategy. Lessons learned included the need for a knowledge management program, a three-pronged advocacy strategy, and capacity strengthening on advocacy and communication in different business lines and countries. These insights are critical for AGRA's new strategy implementation.

Enhancement - Government's delivery capabilities

Our State Capability Unit (SCU) assisted in the ongoing Institutional Capacity Strengthening Plan (ISCPs) taking place in Tanzania, and the design of new ones in Burkina Faso, Mali, Mozambique, and Zambia. The latter was achieved through government-led, consultative and participatory processes that would ensure co-creation and buy-in for the five-year plans.

To help motivate these countries to continuously customise and deploy tools based on their unique circumstances, we implemented a technical assistance intervention to guide the contextual development and review of procurement, planning, budgeting, monitoring, and evaluation tools.

AGRA took the insights from the ICSPs and development of country strategies and implementation tools to carry out a needs and status assessment of each country, to better anticipate their possible deficits and mitigation requirements.

Enforcement-Augmenting Delivery Capacity

AGRA's Centre for African Leaders in Agriculture (CALA), working with its two implementing partners, the African Management Institute and USAID's Policy LINK, progressed with the Advanced Leadership Program for the inaugural cohort of 80 leaders drawn from eight AGRA focus countries.

CALA executed 16 team and individual coaching sessions, seven virtual learning labs on various implementation topics including, performance management, change management, collaborative leadership etc., and seven case studies on agriculture transformation on Kenya's Food Security War Room, Ghana's Planting for Food and Jobs flagship, and the Value4HER platform, among others.

CALA delegates successfully designed and rolled out 16 Action Learning Projects around country flagship priorities, which included 10 ALPs that have received seed funding to aid implementation.

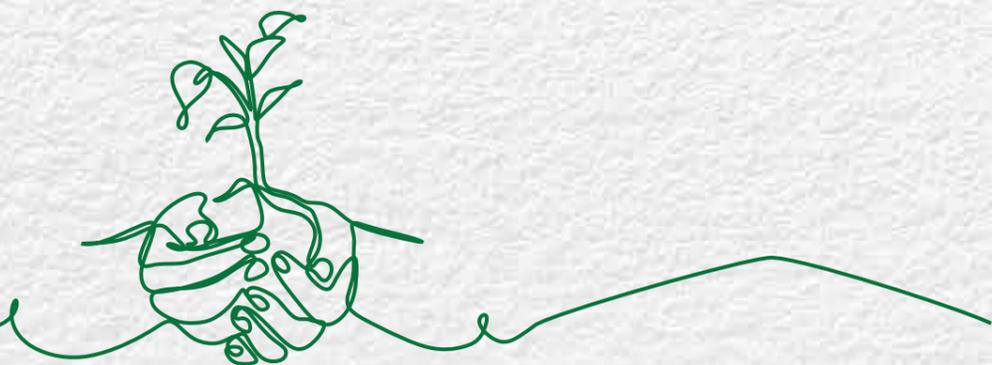
AGRA also successfully convened CALA's second virtual Leadership Forum in February under the theme, 'Collaborative Leadership for Environmental Sustainability in African Agriculture'. The CALA team subsequently carried out country consultations on the CALA experience in the eight focus countries among the CALA delegates, coaches, mentors, and advisory committee members.

A baseline study and two pulse check surveys completed during the Bridge year show that the program provides practical leadership tools and skills that sector leaders in the program are now applying in their everyday implementation including results management, influencing delivery, and improving team management. There is also a notable improvement in collaboration in strategic initiatives across the public, private and civil society sectors as they interact in the program.

The African Agricultural Transformation Initiative (AATI)

In 2022, AGRA collaborated with the founding partners of the African Agricultural Transformation Initiative (AATI), including IFAD, BMGF, and McKinsey and other partners, to establish the Agricultural Transformation Agency (ATA) and hire key personnel . AGRA's involvement included the development and design of ATA's initiatives in target countries like Ghana and Senegal and meeting with the AATI Central Team to refine proposals and engage with government stakeholders. The AATI developed indicators and tools based on the AATI Theory of Change, assessed available Agricultural Delivery Units, and mapped development actors in Ghana. A review of AATI's past engagements in various countries was conducted, and a draft report with lessons learned was submitted to the AATI's Executive Director and AGRA PSC Vice President.

For the development and design of the ATA initiatives in the target countries, the AATI's Executive Director visited Senegal and Ghana to spur progress on the terms of engagement and placement of agriculture delivery units. The project will be launched in Ghana and Senegal in 2023.



AGRA as a Convening Giant *for Partnership*

In its role as the go-to partner for agriculture transformation in Africa AGRA continued to attract the interest of major private sector players interested in engaging smallholder farmers. Companies extended their participation in AGRA's ongoing consortium activities, while others sought opportunities to scale existing partnerships.

Some notable examples were:

- Bayer continue to partner with AGRA Nigeria to train smallholder farmers through our community-based advisor (CBA) network in vegetable production.
- UPL launched at AGRF 2022 the Gigaton Carbon Goal Initiative - a new global ecosystem that will harness sustainable agricultural practices to reduce atmospheric carbon dioxide by 1 billion metric tonnes by 2040. With their partners the FIFA Foundation, UPL will go beyond the commitment to going Net Zero by 2040, and will work with likeminded farming communities to help them capture carbon emissions already in our atmosphere through an ambitious goal - and an industry first approach - to help farmers sequester 1 gigaton, or 1 billion metric tonnes, of carbon dioxide between now and 2040, and reward them for adopting sustainable agricultural practices.
- Wilmar in Tanzania launched and industry-first purchase of rice by weight hence ensuring that farmers receive the value of their production efforts

Given that we did not have catalytic funding and programs on the ground during the Bridge year, we sought strategies for building and maintaining partnerships that rely on programmatic and inter-institutional relationships. Across the year, we started to see some companies taking on AGRA-supported VBAs to promote their technologies and in the coming year, we want to be very intentional in finding ways in which companies can scale our innovations.

“UPL launched at AGRF 2022 the Gigaton Carbon Goal Initiative - a new global ecosystem that will **harness sustainable agricultural practices** to reduce atmospheric carbon dioxide by **1 billion metric tonnes by 2040.**”



The African Agribusiness Dealroom

The Agribusiness Dealroom, which is now five years old, has accumulated a tremendous amount of knowledge from hundreds of companies and investors. We used 2022 to set up a strategy to analyse this information towards the investment pipeline; A pipeline that did not exist a few years ago but now brings 100's of SMEs, 50 government and 150 investors to the table every year and facilitates USD 5 billion for programmes and projects.

In its fifth year, the Dealroom recorded some key achievements in closed deals, increased membership and buy-in from large private sector partners willing to expand their local sourcing. To cement these new business deals and commitments, the 2022 African Agribusiness Dealroom focused on driving the following objectives:

- 1) Increase the visibility of Africa's agriculture investment pipeline.
- 2) Improve the investment readiness of SMEs and governments.
- 3) Drive partnerships and investments across both public and private agriculture opportunities.
- 4) Foster successful matchmaking between capital providers and SME investment opportunities, resulting in increased partnerships, commitments, and resources.

As a result, seven investment opportunities sourced through the Agribusiness Dealroom received USD 7.5 - 10 million in debt and equity investments and three trade deals valued at USD 18.25 million were signed.

Furthermore, in 2022, the Dealroom platform expanded its reach, increasing its membership from 4,500 in 2021 to 4,859 across the year. Members included 1,069 SMEs, 246 investors, over 94 government representatives, and over 500 ecosystem enablers from over 90 countries.

As part of its advocacy program, the Dealroom held 11 knowledge and advocacy sessions at the AGRF summit in Kigali, building on previous experiences and global dynamics. The sessions featured 75 expert speakers representing the government, private sector, development partners, financial institutions and investors, youth, women, and SMEs and centred on:

- Driving competitive regional markets – leveraging the Africa Continental Free Trade Area
- State of finance flows to the sector, the risk-return trade off, and a review of the impact of policy and regulatory requirements on financiers' investment decisions
- Climate Finance
- Increasing sourcing of commodities from local farmers and SMEs
- Financing technology and the digitizing of agriculture

The Dealroom assisted 16 governments in promoting USD5.5 billion in investment opportunities for a variety of investors such as development finance institutions, institutional investors, financial institutions, and private sector investors.

To match these diverse opportunities, the Dealroom team invited a diverse group of investors, including capital providers and companies, primarily regional and international firms looking to expand or explore new Greenfield (where they build their own brand-new facilities from the ground up) and Brownfield (where they can purchase or lease existing facilities) opportunities.

Key learnings from 2022 Dealroom activities:

By working more intensely with a select number of countries to support year-round promotion, better understand the level of investment readiness and the issues constraining investment progress and government capacity, we identified key bottlenecks in project readiness:

- **Project Management Support and Coordination** - there is a high level of interest in investing in opportunities across the continent; however, coordination lapses result in investor fatigue or lack of confidence. At the national level, there is a need to allocate resources to follow up on investment leads, coordinate information gathering from respective government agencies for investors, and project management to oversee the end-to-end implementation of necessary project packaging and investment materials.
- **Technical Assistance to drive 'soft' infrastructure** - Ministries of Agriculture need more capacity and expertise to translate these investment commitments into investable packages for the private sector, based on private-sector interest and needs.
- **Transaction Advisory** - In countries with ready investment projects, there is a need for dedicated expertise on issues such as structuring operating procedures and legal documents for investors, as well as a dedicated resource to manage investor relations through the deal pipeline.

Partnerships in Response to COVID 19 and the Russia-Ukraine Conflict

The COVID 19 pandemic invariably changed how we approach partnerships. Initially we had to shift to crises response and management for example, when it became apparent that farmers were going to struggle with access to fertilizer and seeds and inputs. We partnered with several institutions and companies to facilitate distribution, subsidise supply and provide free or added discount inputs to breadbasket regions.

AGRA at COP27

"There is no place for Africa in a 1.5°C world." – AGRA President, Dr. Agnes Kalibata

An AGRA delegation led by the AGRA Board Chair, Chair of the AGRF partner's group and the former Prime Minister of Ethiopia, H.E. Hailemariam Dessalegn, and Dr. Agnes Kalibata, President of AGRA, attended the 27th meeting of the Conference of the Parties (COP27) to the UN Framework Convention on Climate Change (UNFCCC) at the Egyptian city of Sharm El-Sheikh[13].

AGRA participated in a series of high-level panels and bilateral meetings with the aim of elevating Africa's voice on adaptation to climate change and the need for increased investments in food systems. The team participated in several events that unpacked innovative components for a sustainable transformation agenda, including the recognition of private sector players as key champions in enabling the participation of smallholder farmers in climate programs, address their challenges and seizing emerging opportunities.

The AGRA delegation joined the Global Centre for Adaptation (GCA) in a session titled, "Scaling Climate-Resilient Agriculture and Livestock Systems in Africa", to reflect on the State and Trends in Adaptation Report 2022. The discussion highlighted the need for more granular data to support evidence-based decision-making at the farm, regional and national levels. The expert panel concluded that data collection has to be driven by country-level leadership.

In a different session, Microsoft, through its Africa Transformation Office (ATO), partnered with AGRA to promote data-driven agriculture in improving food security and promoting climate-smart practices in smallholder agriculture. In a session focused on Big Data and smallholder farmer interventions, experts discussed the parameters for successful digitization and scaling of climate smart initiatives. The key issues highlighted included the importance of prioritizing the needs of the beneficiaries in the design and implementation (i.e. smallholder farmer communities), and addressing the current data fragmentation in Africa's food systems.



COP 27
SHARM EL-SHEIKH
7-18 NOVEMBER 2022



AGRA also convened key partners and stakeholders in a dinner session to explore the tangible ways of mobilizing investments and interventions that target smallholder communities. The session was important in amplifying the need for mechanisms to raise US \$100bn of adaptation finance per year, and unleash the opportunity for the large scale financing of climate resilience as part of the global recovery package.

On the COP27 gender thematic leadership day, AGRA and partners championed an important dialogue titled, "Delivering for people and planet -The role of African Women in climate Change Mitigation, Adaptation and Response."

Additionally, in collaboration with the AU, AUDA and NEPAD, AGRA hosted a session focused on the Greening of Africa's Food systems, more specifically the need to build a cohesive voice and implementation strategy for embedding Africa's signature development initiatives including the AfCFTA, UNFSS declarations, AGRF declarations, the CAADP, and Energy for All commitments into climate change discussions, and for concerted efforts in responding to the impacts of climate change by Africa's food systems. A key outcome of the session was a call for continued support to African governments to institutionalize climate action through capacity-building, program design, public investments and the tracking of progress.

AGRA also participated in the Beans is How global launch, an ambitious campaign mobilized by the SDG2 Advocacy Hub to double the global consumption of beans (as well as peas, pulses and legumes) by 2028. Beans have been found to be an affordable, accessible solution to the world's growing health and climate challenges. The seed for the initiative was planted at the AGRF - Africa's Food Systems Summit in Rwanda, during a Presidential dinner hosted by President Kagame.

As a follow-up to the International Women's Day, AGRA and the African Union Commission hosted a high-level virtual COP 27 side event on November 14, 2022. The event aimed to amplify African women's voices in climate change, to create awareness for policies, strategies, and practices; while entrenching their leadership role in climate change mitigation, adaptation, and responses. The event received over 800 registrants (560 female, 240 male) and 249 attendees (175 female, 74 male) from across the globe.



COP 27
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AGRF 2022: Grow. Nourish. Reward. Bold Actions for *Resilient Food Systems*

Under the 2022 theme Grow. Nourish. Reward. Bold Actions for Resilient Food Systems, 6,467 global and African voices met in Kigali, Rwanda, to discuss how African agriculture systems can be transformed to address the vulnerabilities to economic and external shocks and make food production safe, nutritious and, most importantly, sustainable. The continent's agenda and priorities in terms of agriculture, were encapsulated in four strategic areas of actions: Transformation of Food Systems; Building Resilience in African Food Production; Markets and Trade, and Accelerating Climate Action through Food Systems.

The event provided the opportunity to cascade AGRA's strategic efforts, transformation commitments and calls to action to different stakeholder groups, driving the much-needed inclusive and long-term investments based on strong partnerships.



AGRF is now the Africa Food Systems Forum

It was also in Kigali that the AGRF unveiled a new brand identity, as the Africa Food Systems Forum - AFSF, to usher in the next phase of its journey. The rebrand demonstrates a desire to evolve from an annual event to a platform that elevates current and future partnerships in Africa's agri-food sector, all year round.

The AFSF will achieve this by building on the conversations and critical decisions about food systems and security that are emerging from the annual forum to sustain the year-round stakeholder engagement required to drive the action for continental food security goals.

“ The best time to plant a tree was twenty years ago, the next best time is today.’ We must ensure that we are planting the seeds and taking the decisive action required today to safeguard our future ... Partnerships are central to our ethos, and we look forward to working with existing and new partners to challenge our thinking and to keep iterating in our quest to support the continent to become more food secure. The AGRF will focus on engaging all voices across food systems to accelerate the solutions that are required to transform Africa’s agricultural sector. ”

Jennifer Baarn

Acting Managing Director, AGRF

Strategic Outlook and *Way Forward*

The changes we have made throughout this year have been paramount in making AGRA a 'fit to purpose' organization. AGRA's founding objective was to reduce hunger and poverty in Africa through agricultural development and even though our 'why' remains constant, the 'how' must change to cater to an evolving landscape and absorb the lessons of a learning-based execution model.

Our pivot into sustainable food systems with redefined business lines and cross-cutting areas will continue to utilise a holistic execution model that removes the siloes that have, so far, hampered progress and considers all elements, relationships, and related effects within the food system for people, livelihoods, and the environment.

Part of this is stepping beyond productivity and food security to nutrition-sensitive interventions. Because nutrition has strong synergy with our existing seed systems and sustainable farming work, we are confident that AGRA can strengthen partnerships to improve crop diversification and nutrition varieties for consumers.

With climate change already affecting the weather systems on which (nutritious) food systems rely, the "business as usual" approach is no longer viable. If the continent warms by 2 degrees Celsius by 2050 – within Intergovernmental Panel on Climate Change (IPCC) projections – crop yields across sub-Saharan Africa will reduce by 10%. We are steadfast that we must face this challenge head-on with defined development pathways backed by drought-resistant crop varieties, protective and regenerative farming practices, inclusive policy formulation and carbon financing.

Above nutrition and resilience, we want to affirm inclusion as a critical component in sustainability, in our next strategic period. We have purposed to incorporate work streams and interventions specifically for women, youth and people with disabilities because of the invaluable contributions they can make to the transformation agenda. We will also systematically identify and tackle gendered constraints and intentionally invest in these minority-led farms, businesses, and enterprises.

So far we have seen great strides by these demographics to adopt and champion innovative agricultural solutions and technologies – an indication that they will positively impact value chains. They are becoming powerful agents of change, with

strong "indigenous and local knowledge related to water harvesting and storage, land restoration; food production and rationing and natural resources management, which can be harnessed for lasting and scalable change."

We will continue to operate in countries that align with our strengths and capabilities while heavily prioritising country contexts. As detailed throughout this report, we undertook exhaustive research and country level consultations to foster the collaborative and complimentary approach we are taking to inclusive and collective agricultural transformation. As an alliance, our confidence in partnerships stems from this practice of collaborative change, and we will consistently work alongside governments, inter-regional bodies, development partners, research institutes and think tanks to catalyse and leverage cutting-edge scientific research and evidence based agricultural policies and programs to achieve shared goals and tackle systemic bottlenecks. We also hope to re-catalyse sector momentum by promoting agricultural markets and trade, to significantly increase agricultural contribution to national growth.

Finally, under our next strategy, we will use a results-based and impact-driven approach to track and report on our programmatic activities and our contributions to the continental agenda. This Monitoring Evaluation and Learning (MEL) system will capture the progress, success, and failures of different grants, inform management decision-making processes, and contribute to broader knowledge and learning in the field. We believe this approach will ensure that we track and measure the tangible changes that AGRA makes to food systems and the resulting impact on the farmer and processes at the national and continental level.

Across our business lines, our MEL system aims to: increase value of farm gate sales, enhance inclusive market systems, improve volumes of domestic and intra-African trade, increase adoption of diverse, nutritious and climate-smart seeds, increase functional seed systems, improve productive capacity in the face of climate shocks, strengthen national sustainable farming frameworks, improve soil health and provide an enabling policy environment to support agricultural transformation. By utilising better data and M&E tools, we will support governments in forming clear policies, programs, and capabilities for tackling systemic bottlenecks in the sector.



Consolidated Statement of Financial Position as 31st December 2021

The directors are responsible for ensuring that AGRA keeps proper accounting records that are sufficient to show and explain the transactions of AGRA; disclose with reasonable accuracy at any time the financial position of AGRA; and that enables them to prepare consolidated financial statements of AGRA that comply with prescribed financial reporting standards. They are also responsible for safeguarding the assets of AGRA and for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The directors accept responsibility for the preparation and presentation of these consolidated financial statements in accordance with Accounting Principles Generally Accepted in the United States of America (US GAAP). They also accept responsibility for:

- i. Designing, implementing and maintaining internal controls as they determine necessary to enable the preparation of consolidated financial statements that are free from material misstatements, whether due to fraud or error;
- ii. Selecting suitable accounting policies and then apply them consistently; and
- iii. Making judgements and accounting estimates that are reasonable in the circumstances.

Having made an assessment of AGRA's ability to continue as a going concern, the directors are not aware of any material uncertainties related to events or conditions that may cast doubt upon AGRA's ability to continue as a going concern.

The directors acknowledge that the independent audit of the consolidated financial statements does not relieve them of their responsibility.

Approved by the board of directors on 7 June 2022 and signed on its behalf by:



H.E. Hailemariam Dessalegn
Board Chairman, AGRA

7 June 2022



Dr. Agnes Kalibata
President

7 June 2022

Financial report

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The group auditor, Ernst & Young LLP, has expressed willingness to continue in office.

Board of Directors

- 1 **H.E Hailemariam Dessalegn**
Board Chair
- 2 **Agnes Kalibata**
President
- 3 **Hixonia Nyasulu**
- 4 **Frank N.J Braeken**
- 5 **Prof. Joachim von Braun**
- 6 **H.E Jakaya Mrisho Kikwete**
- 7 **Ndidi Okonkwo Nwuneli**
- 8 **Rodger Voorhies**
- 9 **H.E. Lionel Zinsou**
- 10 **Ada Osakwe**
- 11 **Binta Touré Ndoye**
- 12 **Ms. Delphine Traoré**
- 13 **Mallika Srinivasan**
- 14 **Roy Steiner**
- 15 **Ambassador David J. Lane (Ret.)**

Consolidated

STATEMENT OF FINANCIAL POSITION

AS AT DECEMBER 31, 2022

In Thousands	2022 US\$	2021 US\$
Assets		
Current Assets		
Cash and cash equivalents	57,467	64,821
Receivables and prepaid expenses	2,879	3,038
Investments in BlackRock	27,900	28,639
Total current assets	88,246	96,498
Non-Current Assets		
Investments in Injaro	1,169	1,259
Investments in Financial Assets	581	659
Investments in ABC Fund	3,726	4,260
Intangible assets, net	436	655
Property and equipment, net	621	695
Total non-current assets	6,533	7,528
Total Assets	94,779	104,026
Liabilities and Net Assets		
Liabilities		
Accounts payable and other liabilities	10,823	12,123
Contributions payable	2,640	6,032
Repayable Loans	14,749	12,311
Program grants payable	(309)	366
Total liabilities	27,903	30,832
Net assets		
Without donor restrictions		
Undesignated	4,000	7,737
Board-Designated Reserve Fund	7,288	2,482
With donor restrictions	55,588	62,975
Total net assets	66,876	73,194
Total liabilities and net assets	94,779	104,026

Consolidated

STATEMENT OF ACTIVITIES

AS AT DECEMBER 31, 2022

In Thousands	2022 US\$	2021 US\$
Revenue		
Contributions received	80,474	90,518
Net Investment (Loss)/Income	(336)	897
Other income	113	723
Total revenue	80,251	92,138
Operating Expenditure		
Grants	29,649	37,902
Program Costs	18,392	13,517
African Seed Investment Fund LLC Costs	119	107
AECF Program Costs	9,641	8,252
Monitoring and Evaluation Costs	2,566	3,657
Program Support Costs	19,705	16,989
Resource Mobilization Costs	909	760
Administration and Support Costs	9,010	8,871
Total expenditure	89,991	90,055
Change in net assets	(9,740)	2,083



Board of Director's

AGRA's Board of Directors is a governing body with legal duties and responsibilities. As the governing body for AGRA, the Board is legally accountable for the organization and is required to act in the interests of AGRA's stakeholders, employees and the public good. In support of these goals, the Board provides strategic guidance to the organization, maintains independent oversight of its financial and programmatic performance, and ensures effective management and governance. In carrying out its mandate, the Board is supported by several internal committees.

These include:

Audit and Risk Committee

Provides AGRA's Board of Directors, donors and stakeholders with assurance that AGRA's financial reporting, internal controls and risk management meet the highest standards, and that AGRA is in compliance with all relevant laws and regulations.

Finance and HR Committee

Responsible for safeguarding AGRA's financial assets and ensuring the effective and transparent use of AGRA's financial and human resources.

Nominations and Governance Committee

Responsible for maintaining the quality and effectiveness of AGRA's Board of Directors, and ensuring that the Board fulfills its legal responsibilities and adheres to guidelines and standards of practice in corporate governance.

Program Committee

Advises the AGRA Board and program leaders on AGRA's strategic direction, recommends program investments and monitors results.



H.E. Hailemariam Dessalegn
Board Chair



Dr. Agnes Kalibata
President



Hixonia Nyasulu
Board Member & Chair,
Nominations & Governance
Committee



Prof. Joachim von Braun
Board Member & Chair,
Programs Committee



Binta Touré Ndoye
Board Member



Roy Steiner
Board Member



Rodger Voorhies
Board Member & Chair,
Audit & Risk Committee



Delphine Traoré
Board Member



Frank N.J. Braeken
Board Member & Chair,
Finance & Human
Resources Committee



Ambassador David J. Lane (Ret.)
Board Member



H.E. Jakaya Mrisho Kikwete
Board Member



Ndidi Okonkwo Nwuneli
Board Member



Ada Osakwe
Board Member



H.E. Lionel Zinsou





Key Partners

Partnership for Inclusive Agricultural Transformation in Africa (PIATA) Partners



Other Key Resource Partners



Strategic Partnerships





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