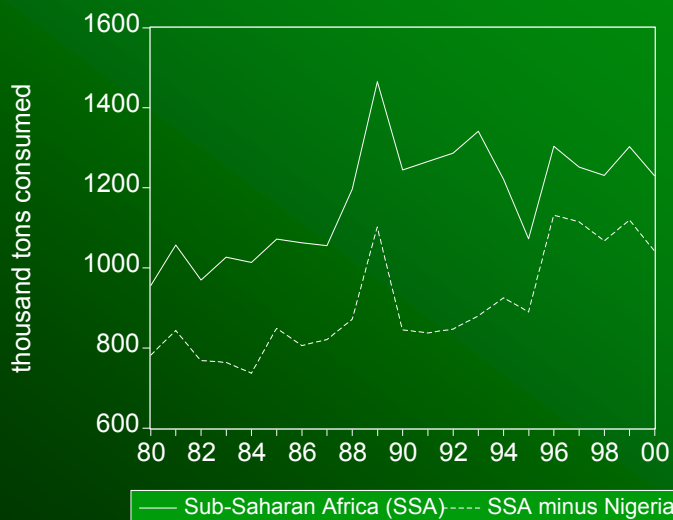


FERTILIZER CONSUMPTION TRENDS IN SUB-SAHARAN AFRICA

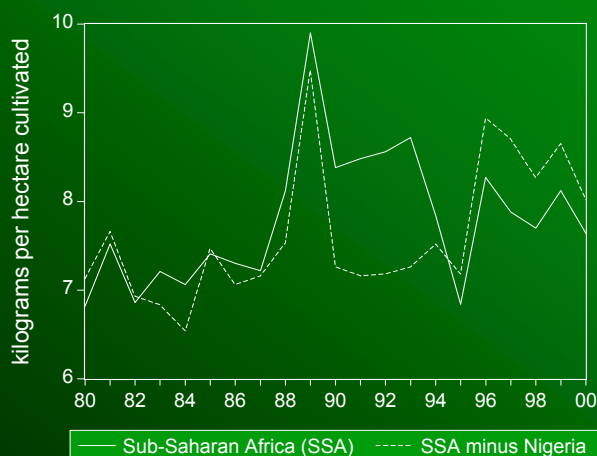
T.S. Jayne, Valerie Kelly, Eric Crawford

Workshop on
“What Works for African Smallholders: Input Use and Market
Development in the Context of Limited Credit Markets”
Ronald Reagan Center, June 5, 2003

Fertilizer Use in SSA, 1980-2000



Fertilizer Use Intensity, 1980-2000 (kgs per cultivated hectare)



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

	Change in Fertilizer Consumption	Change in Fertilizer Use Intensity
Sub-Saharan Africa	+16%	+5%
Sub-Saharan Africa minus Nigeria	+32%	+15%

- Overall fertilizer use intensity *still* extremely low: ~ 9 kgs/ha
- But great variability:
 - Over 100 kgs/hectare in parts of Western Kenya (where > 60% use fert)
 - Virtually nil in semi-arid areas with no water control

Aggregate Fertilizer Trends Mask Great Variability Across Countries

17 Countries Using over 10,000 tons per year.

- These 17 countries account for 87.9% of SSA fertilizer consumption
- Of these:

Aggregate Fertilizer Trends Mask Great Variability Across Countries

- 8 Countries > 45% increase in fertilizer use per cultivated hectare (1980-89 to 1996-2000)
 - Benin, Burkina Faso, Chad, Cote d'Ivoire, Ethiopia, Kenya, Senegal, Togo

Aggregate Fertilizer Trends Mask Great Variability Across Countries

- 8 Countries < 10% increase in fertilizer use per cultivated hectare
 - Cameroon, Ghana, Madagascar, Malawi, Nigeria, Tanzania, Zambia, Zimbabwe
 - Many of these countries heavily subsidized fertilizer (> 50% in Ghana, Tanzania, Nigeria)

Aggregate Fertilizer Trends Mask Great Variability Across Countries

- Of these, Cameroon and Ghana, which reformed early, have recovered (past pre-reform levels in Ghana)
- Nigeria, Zambia, Malawi, Zimbabwe continue to be heavily involved in fertilizer distribution
 - Designed to reduce food insecurity and/or reward political supporters
 - Discourages private investment / adds risks and costs

Aggregate Fertilizer Trends Mask Great Variability Across Countries

- 1 Country $> 10\%$ and $< 45\%$ increase in fertilizer use per cultivated hectare
 - Mali

Summary

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

Summary

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