

IMPROVING DIET QUALITY IN WEST AFRICA

THE ROLE OF INTRA-REGIONAL FOOD TRADE



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SUMMARY

Food trade plays a significant role in shaping food security and nutrition worldwide, with both positive and negative implications for diet quality. This is particularly relevant in West Africa, where persistent challenges — such as low dietary diversity and limited affordability of healthy diets — coexist with rapidly changing food consumption patterns. Intra-regional food trade is especially important in this context, yet its scale and nutritional significance remain poorly understood due to the large share of trade that goes unrecorded in official statistics.

This working paper draws on analytical work conducted by the Global Alliance for Improved Nutrition (GAIN) and the Sahel and West Africa Club (OECD/SWAC) to examine how intra-regional food trade influences diet quality in West Africa. It highlights key diet quality challenges in the region, including low dietary diversity, as well as opportunities, such as relatively low consumption of unhealthy foods. It then documents the scale, composition, and nutritional profile of intra-regional food trade, emphasizing that up to 85% of these flows are unrecorded and therefore largely invisible in policy debates on healthy diets and nutrition.

When unrecorded trade is taken into account, intra-regional trade emerges as an important contributor to calorie availability, food diversity and year-round supply, particularly in urban areas and during seasonal gaps. It increases the circulation of many nutrient-dense foods and can improve their affordability through expanded supply. But these gains do not automatically lead to healthier diets. Trade also circulates less healthy processed products, while affordability constraints, unequal purchasing power, and changing food environments continue to limit poorer households' access to more nutritious foods.

Regional trade facilitation policies can strengthen the contribution of intra-regional food trade to healthier diets but would benefit from being combined with complementary measures. Key priorities include implementing and enforcing regional trade agreements, enhancing regulatory convergence, improving food trade infrastructure and logistics, expanding access to market information and trade-related public services, strengthening coherence between trade and nutrition policies, and investing in better data systems to measure intra-regional food trade and nutrition outcomes.

KEY MESSAGES

- Diet quality in West Africa is constrained by insufficient diversity, limited affordability of healthy diets, and underconsumption of highly nutritious foods. Consumption of unhealthy, ultra-processed foods remains low but is on the rise.
- Up to 85% of intra-regional food trade in West Africa is unrecorded. Foods central to nutritious diets are especially poorly captured. Official statistics thus substantially understate the contribution of regional markets to nutrient supply.
- Intra-regional food trade plays an important but underestimated role in diet quality by supporting year-round food supply, especially in urban areas. But its benefits are limited by affordability constraints and weak food environments, while trade can also increase the availability of unhealthy foods.
- Trade policies can strengthen the contribution of intra-regional food trade to healthier diets by improving the availability and affordability of nutritious foods. However, complementary nutrition and food-environment policies are also needed to curb the spread of unhealthy foods and ensure poorer households can benefit from more diverse food supply.

INTRODUCTION

Global food trade is substantial. Worldwide, millions of tonnes of food are traded internationally each day; in many countries, imports represent more than 5% of average dietary energy requirements (Figure 1) (1). Food trade can have both positive and negative effects on diets, ranging from improved access to nutritious foods and stabilising supply across seasons, to upward pressure on domestic food prices and increased consumption of unhealthy foods (1,2). These effects vary by context, depending on countries' levels of economic development, demographic profiles and economic structure (1). They can be particularly large—either positively or negatively—for smaller economies that face significant constraints to producing diverse food year-round (1,2).

The role of trade in shaping diet quality is especially relevant in West Africa, which faces high levels of undernourishment and low levels of dietary diversity. Yet, this role remains poorly understood. A large share of food trade in the region is conducted internally and is absent from official customs statistics. The OECD Sahel and West Africa Club (OECD/SWAC, 2025) estimates that up to 85% of intra-regional food trade is unrecorded (1). This data gap contributes to misperceptions regarding the scale of regional food trade, its relative importance compared to extra-regional imports, and its contribution to the availability and diversity of nutrients across the region.

These misperceptions, in turn, contribute to limited policy attention to intra-regional food trade as a lever for improving diet quality. West Africa faces persistent constraints to regional food trade including infrastructure gaps, trade barriers and unsupportive policy environment, notably in access to finance, food trade logistics or market information.

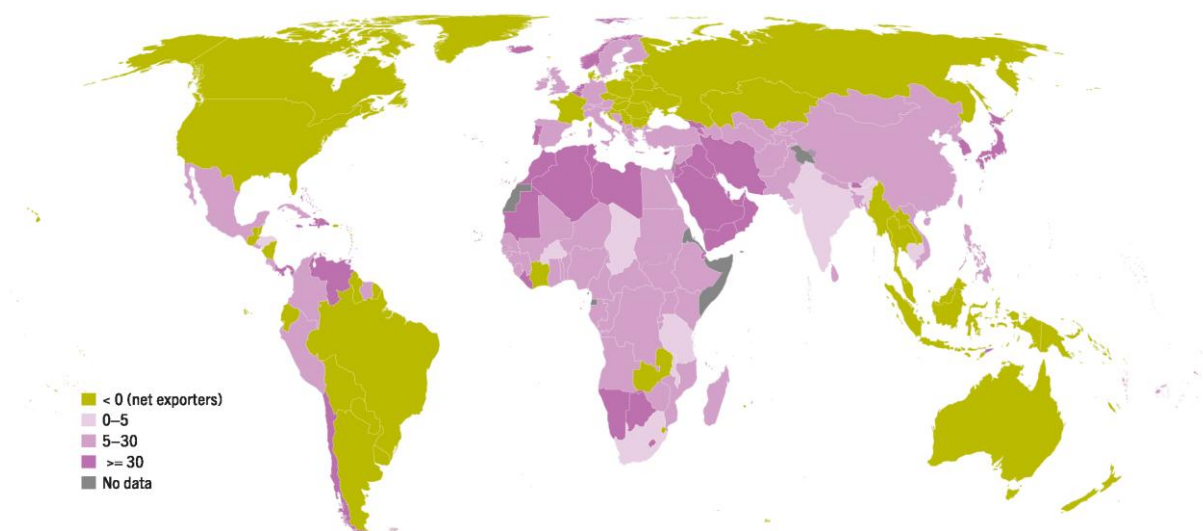


Figure 1. Share of net food imports in total domestic food supply, as a percentage of total kilocalories (kcal). Reproduced from (2), permission not required.

This working paper draws on analytical work conducted by the Global Alliance for Improved Nutrition (GAIN) and OECD/SWAC to examine how intra-regional food trade influences diet quality in West Africa. The first section sets the context by describing the region's diet quality profile and the dietary patterns and food systems factors that underpin it. The second section analyses the role of intra-regional food trade in shaping diet quality in West Africa, while the third section looks at how this is being shaped by policy and the fourth

section considers future prospects for supporting improved diet quality through trade in the region.

CONTEXT OF DIET QUALITY IN WEST AFRICA

Diet quality reflects the extent to which diets are healthy in terms of being diverse; adequate but not excessive in essential nutrients; balanced in energy intake and sources; and moderate in consumption of foods with detrimental health effects (3). Diet quality is affected by availability, accessibility, affordability, desirability, and quality of foods (which in turn are affected by numerous broader food system aspects, such as infrastructure and climate), as well as consumers' individual choices and preferences. Compared with other world regions, diets in West Africa remain relatively low in unhealthy foods but are marked by persistently low dietary diversity and insufficient intake of recommended nutrient-rich foods. While low consumption of unhealthy foods has historically been a relative strength, recent trends suggest this advantage is eroding, with sales and consumption of ultra-processed foods increasing in several countries.

LOW BUT RISING CONSUMPTION OF UNHEALTHY FOODS

Across the region, sales of ultra-processed foods and consumption of these as well as other unhealthy foods – including soft drinks, processed meat, sugary food, and salty ultra-processed foods – are lower than many other parts of the world. In Benin, Burkina Faso, Niger, Sierra Leone, and Togo, fewer than one-third of people aged 15 years and older reported consuming these foods in the previous day. However, consumption is significantly higher in Mali, Mauritania, and Senegal, where more than half of adults did (4) (Figure 2).

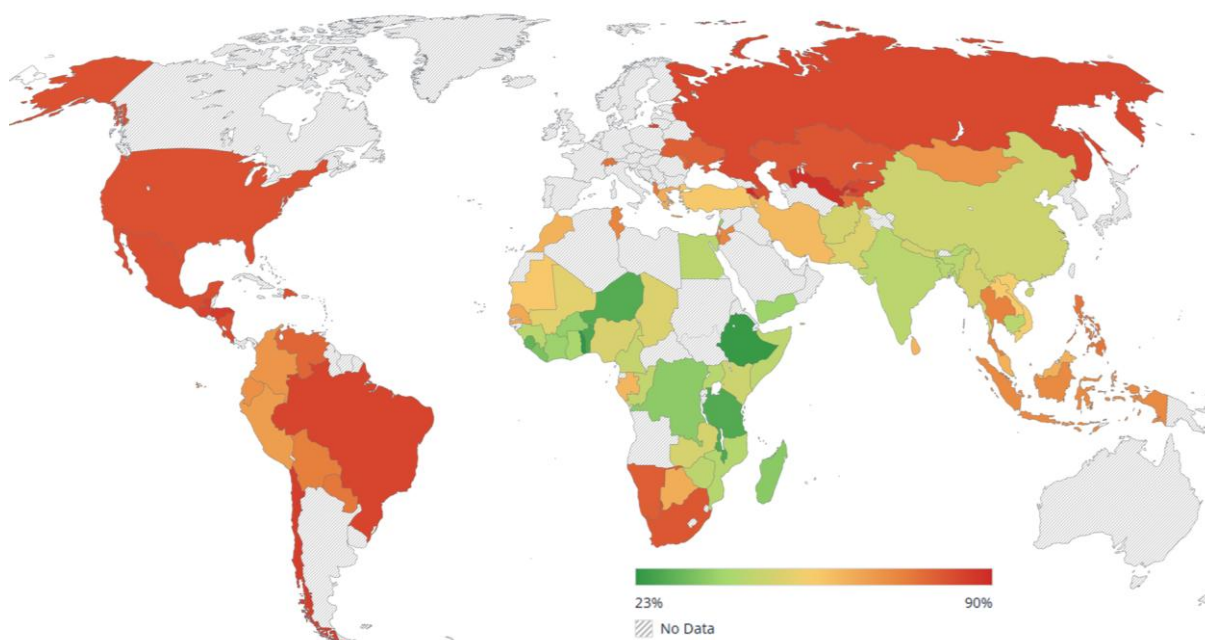


Figure 2. Unhealthy Food Consumption: *Percent of people 15 years and older consuming any of the following: (a) more than one sugary food or beverage or any soft drinks (including baked or grain-based sweets; other sweets; sweetened tea, coffee, or milk drinks; fruit juice or fruit drinks; soft drinks); (b) more than one ultra-processed salty food (including packaged ultra-processed salty snacks, instant noodles, fast food, processed meat, or deep-fried food); or (c) processed meat. Source: Global Diet Quality Project via Food Systems Dashboard*

For example, soft drinks are one type of sentinel unhealthy food/beverage, being associated with numerous negative health effects. Their consumption is low across the region, with fewer than 10% of people aged 15 and older reporting consumption on the previous day in Niger and Togo, compared to averages of 17.5% in Sub-Saharan Africa, 39% in Latin America, and 42% in the United States. Nigeria records the highest prevalence in the region, at 32% (4). Although overall levels remain relatively low, sales of ultra-processed foods are growing, especially in Côte d'Ivoire and Nigeria, where the five-year growth rates were 16% and 21%, respectively (5,6). This trend is reinforced by the limited adoption of health-related food environment policies across the region, with Ghana being a notable exception (7). This is raising the risk of making it more likely that consumption of unhealthy foods grows in the future.

PERSISTENT GAPS IN DIETARY DIVERSITY, ESPECIALLY FOR WOMEN AND CHILDREN

Despite comparatively low consumption of unhealthy foods, dietary diversity remains a major challenge across West Africa. Most countries report low dietary diversity among women aged 15–49 years. In Liberia and Niger, only around one-third of women consumed the recommended number of food groups on the previous day (4), compared to nearly 90% in top-performing countries, implying a high risk of micronutrient deficiencies for the majority.

Dietary diversity is even more constrained among young children. In Guinea, Guinea-Bissau, Liberia, Niger and Nigeria, fewer than 15% of children aged 6-23 months met minimum dietary diversity standards on the previous day (8), leaving most children vulnerable to micronutrient deficiencies during a critical stage of growth and development. This compares to rates over 80% in top-performing countries such as Peru, Serbia, and Iran.

At the same time, outcomes vary considerably across the region. In Mali and Senegal, 58% and 75% of women, respectively, meet dietary diversity recommendations, while this reaches 42% for children in Ghana (4,8). These experiences suggest that higher dietary diversity is achievable within the region and offer potential lessons for countries facing more acute challenges.

INSUFFICIENT CONSUMPTION OF PROTECTIVE FOODS

Low intake of protective foods, such as fruits, vegetables, and whole grains, pulses, nuts, and seeds, further constrains diet quality. In Burkina Faso, Côte d'Ivoire, Guinea, and Niger, fewer than one-quarter of adults consumed all three sentinel protective food groups on the previous day (compared to over 70% in top-performing countries globally) (4). Similarly, fewer than one-quarter of adults in Benin, Burkina Faso, Côte d'Ivoire, Ghana, Guinea, Liberia, Mauritania, Niger, Nigeria, and Togo consumed all five food groups typically recommended for daily intake (5) (Figure 3).

Fruit consumption is particularly low across the region, with fewer than one-third of adults reporting fruit intake on the previous day in Burkina Faso, Côte d'Ivoire, Guinea, and Niger (compared to over 90% in global top-performing countries) (4). Mali stands out, with 41% of adults consuming protective foods and 32% consuming all five food groups, illustrating that improved diet quality outcomes are possible within current regional contexts.

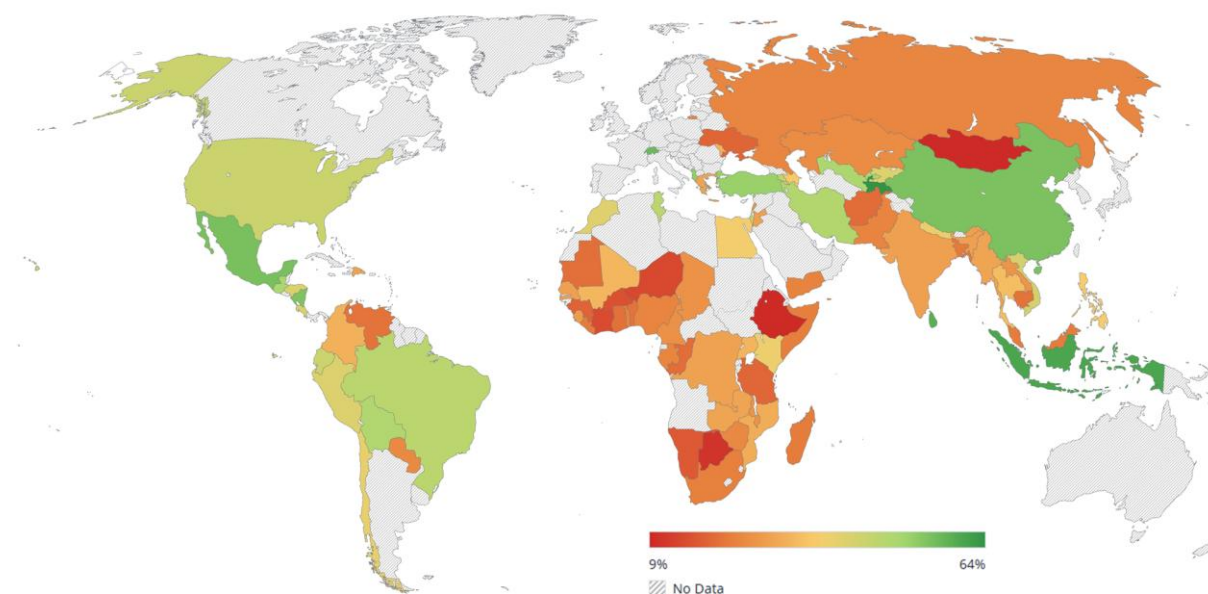


Figure 3. All-5: Consumption of All Five Food Groups: *Percent of people 15 years and older consuming all five food groups typically recommended for daily consumption: fruits; vegetables; pulses, nuts, or seeds; animal-source foods; and starchy staples. Source: Global Diet Quality Project via Food Systems Dashboard*

LOW AVAILABILITY OF FRUITS AND VEGETABLES

Low consumption of recommended foods is closely linked to limited availability. In ten countries (Burkina Faso, Benin, Côte d'Ivoire, The Gambia, Guinea-Bissau, Liberia, Mauritania, Nigeria, Sierra Leone, and Togo), combined fruit and vegetable availability remains below 400 g per person per day. This indicates that national food supplies are insufficient to meet World Health Organisation recommendations, even under conditions of equal access (9).¹

AFFORDABILITY AS A BINDING CONSTRAINT ON HEALTHY DIETS

Affordability further limits access to healthy diets across the region. In West Africa, healthy diets are 3.6 times more expensive than energy adequate diets (10). More than half the population cannot afford a healthy diet in ten countries – Benin, Burkina Faso, Ghana, Guinea, Guinea-Bissau, Liberia, Mali, Mauritania, Sierra Leone, and Togo – while in Niger and Nigeria more than 75% of the population faces this constraint (11). In most countries, the cost of a healthy diet is higher than current food expenditures, suggesting that complying with national food-based dietary guidelines would require households to spend considerably more on food than they currently do (12). Improving diet quality therefore requires addressing both the availability and affordability of healthy foods.

¹ This data is sourced from the FAO Food Balance Sheets. Food Balance Sheets may misestimate food availability in West Africa where intra-regional trade is imperfectly captured in official statistics. For example, Food Balance Sheets for West African countries report no millet imports between 2018 and 2020, while estimates of unrecorded intra-regional trade suggest that approximately 190 000 tonnes of millet were imported over the same period (1).

THE ROLE OF INTRA-REGIONAL FOOD TRADE IN SHAPING DIET QUALITY

THE UNDERESTIMATED SCALE OF INTRA-REGIONAL FOOD TRADE IN WEST AFRICA

Diet quality in West Africa depends not only on domestic food production or imports from the rest of the world, but also on food trade within the region. Intra-regional food trade plays a central role in shaping dietary adequacy, diversity, and affordability, by influencing which foods are available, at what cost and with what regularity. Yet, its scale and nutritional importance have long been underestimated in official statistics and policy debates.

Recent estimates by OECD/SWAC (2025) suggest that the value of food traded within West Africa amounts to approximately USD 10 billion per year—around six times higher than indicated by official trade statistics (USD 1.7 billion) (Figure 4). This level of trade is comparable to the region’s combined imports of rice, wheat, and palm oil, and exceeds the total volume of official development assistance directed to agriculture in West Africa. Despite its magnitude, an estimated 85% of intra-regional food trade remains unrecorded, moving through dense networks of traders, transporters and market intermediaries operating across both formal and informal channels (Box 1).

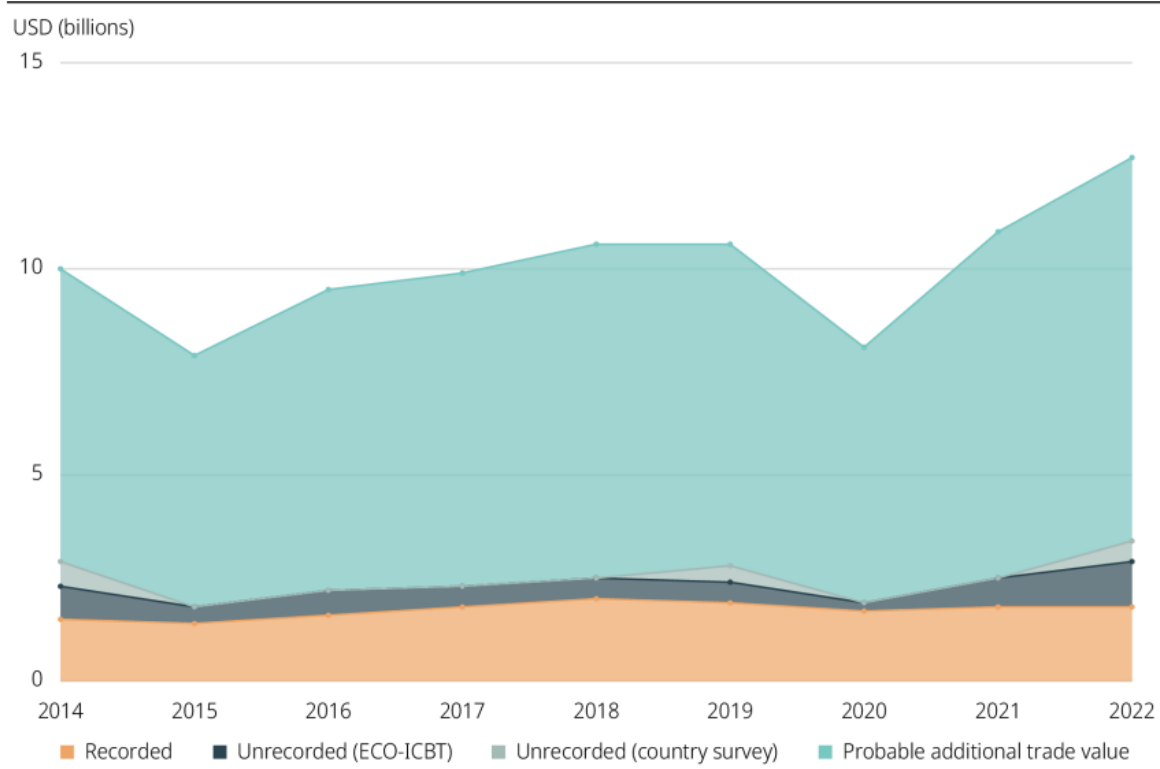


Figure 4. Intra-regional food trade in West Africa, 2014-2022. *Source: OECD/SWAC, 2025*

BOX 1. UNRECORDED AND RECORDED FOOD TRADING CHANNELS

Unrecorded intra-regional food trade in West Africa is often equated with informality. In practice, it involves a wide range of actors, including both informal traders—unregistered business operators—and formal firms that engage in unrecorded transactions for economic and institutional reasons.

A key driver of unrecorded trade is the high transaction cost associated with formal trade procedures. Traders may “follow the path of least resistance” (13), opting for unrecorded routes to avoid administrative delays and fees that can exceed the value of the goods traded (14). In some contexts, unrecorded channels offer greater predictability and more stable income streams than formal alternatives.

Safety concerns further influence trading choices, particularly for women traders. Evidence from the Cotonou–Niamey corridor shows that more than one-quarter of cross-border food traders witnessed verbal or physical harassment in the preceding six months, while nearly one-quarter reported experiencing sexual harassment (15). Such risks create strong incentives to bypass formal border posts.

Social and historical factors also play a role. Trading communities with long-standing cross-border kinship ties—such as Hausa networks spanning Nigeria, Niger and Benin—often circulate food outside formal routes. Where borders are porous and state presence is limited, unrecorded trade may represent the prevailing mode of exchange rather than an exception (16,17).

Importantly, unrecorded trade does not occur only at informal crossings. It can also take place at official border posts, where agricultural goods traded under the ECOWAS Trade Liberalisation Scheme (ETLS) are exempt from import duties. In such cases, border officials may have limited incentives to record food flows or may prioritise the clearance of taxable goods (18).

OFFICIAL DATA DISTORT THE TRUE FLOWS OF CALORIE AND NUTRIENTS

Beyond underestimating volumes, official trade statistics also misrepresent the composition of intra-regional food trade and the nutritional profile of traded products. As a result, recorded data provide a distorted picture of calorie and nutrient flows within the region, with important implications for assessments of food availability and diet quality.

The degree of under-recording varies significantly across product categories. While an estimated 20–27% of processed foods, oils and fats go unrecorded, this share rises to 62%–84% for staples and high-value foods such as starchy roots, cereals, fruits and vegetables (Figure 5) (1). At the product level, discrepancies are even more pronounced. For example, 97% of the value of intra-regional maize trade is unrecorded, alongside 96% of millet, 95% of cassava and 88% of cowpea trade. By contrast, official statistics capture most trade in several processed products, including instant coffee (100%), frozen fish (96%), palm oil (84%), wheat flour (81%), and flavour cubes (78%).

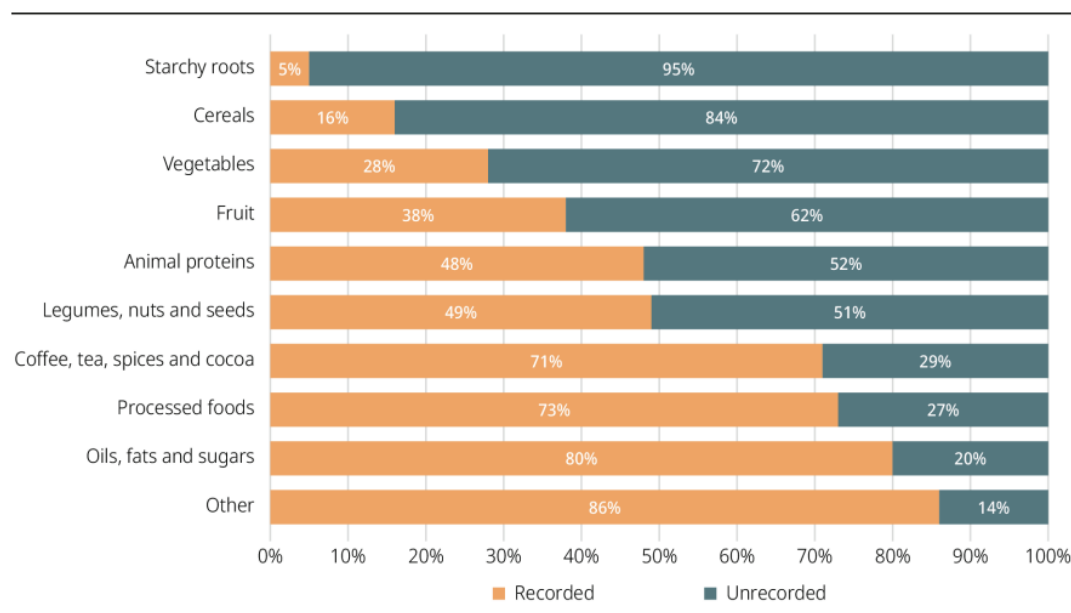


Figure 5. Intra-regional food trade, by food group and recorded status, 2014-2022.

Source: OECD/SWAC, 2025

These differences are reflected in the composition of recorded and unrecorded trade flows. Processed foods, such as flavour cubes, concentrated milk, and pasta, account for 32% of the total value of recorded food trade in West Africa. Sugars, oils, and other fats, predominantly palm oil, represent a further 25% (1). In contrast, unrecorded trade is dominated by raw and minimally processed products. Live animals account for 40% of unrecorded trade values, followed by cereals (26%) and legumes and pulses (6.8%), together representing nearly three-quarters of unrecorded trade by value.

These unrecorded flows contribute to higher quality, nutrient-dense diets. Approximately three-quarters of calories associated with unrecorded trade originate from food groups central to balanced diets, including animal-source foods, legumes, nuts, seeds, fruits, and vegetables. However, almost half of the calories captured in recorded trade come from palm oil, flavour cubes and other highly processed products that are energy-dense and high in fat, sugar and salt.² Protein-rich foods illustrate this divergence clearly: while they account for only 15% of recorded food trade, they represent 36% of unrecorded trade³, reflecting the importance of livestock and fish flows for dietary quality, including adequacy of protein and key micronutrients like iron and zinc, across the region.

THE OVERLOOKED DIVERSITY OF INTRA-REGIONAL FOOD TRADE

Differences in agro-ecological conditions, climate, private investment patterns and policy orientations across West Africa have led to distinct food production specialisations (13). These structural differences underpin complementary intra-regional trade patterns, through which a wide range of food products cross borders on a daily basis.

² Some of these food items may, however, include fortified foods such as fortified oil, iodized salt, fortified bouillon cube. The evidence is not granular enough to capture these distinctions.

³ Protein-rich is defined as being within the top quartile of protein density (protein content per gram) in the distribution of food products being traded regionally. Protein-rich foods include live animals, fish (dried or otherwise) as well as legumes, nuts, and seeds.

By distributing food across the region, intra-regional trade expands the range of foods available in domestic markets, improving access to diversified diets. Indeed, regional trade encompasses a broad array of food products, many of which are absent from national trade statistics (Figure 6). Based on a combination of recorded trade data and national surveys of unrecorded food trade (Nigeria 2013/14; Benin 2019 and 2022; Togo 2019), Benin imported 115 distinct food products at the broad product category level “Harmonised System 4”⁴, Togo 101 and Nigeria 99. Export patterns are similarly diversified, with these countries exporting 105, 115 and 109 distinct food product groups to regional markets, respectively (1).⁵

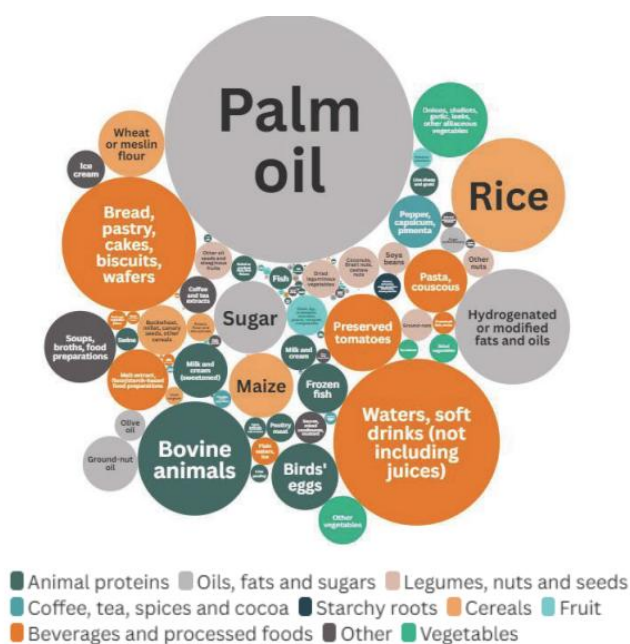


Figure 6. Diversity of regional food imports in Benin, 2019 (by food group, recorded and unrecorded). Source: OECD/SWAC, 2025

When expressed in nutritional terms, intra-regional food trade represents a substantial share of the regional food supply. An estimated 68 trillion kilocalories are traded within West Africa each year (1), sufficient to meet the annual energy requirements of around 80 million people—nearly one-quarter of the region’s population (Figure). In addition, approximately 2.6 billion kilograms of protein are exchanged annually, corresponding to the estimated annual protein requirements of nearly 200 million people. While exact figures are not available for flows of micronutrients, the flows of animal-source foods and vegetables suggest these are also significant. These flows therefore contribute not only to caloric adequacy but also to protein sufficiency and diet quality.

⁴ The Harmonized System (HS) is an internationally standardized product classification system administered by the World Customs Organization. At the 4-digit level, known as “HS 4”, products are grouped into broad but clearly defined categories that identify the general type of good (e.g., cheese, coffee, poultry meat). This level is harmonized globally and serves as a key reference point for tariff schedules, trade statistics, and regulatory frameworks.

⁵ Against 90 (Benin), 83 (Nigeria) and 87 (Togo) recorded imports; and 77 (Benin), 59 (Nigeria), and 58 (Togo) recorded exports.

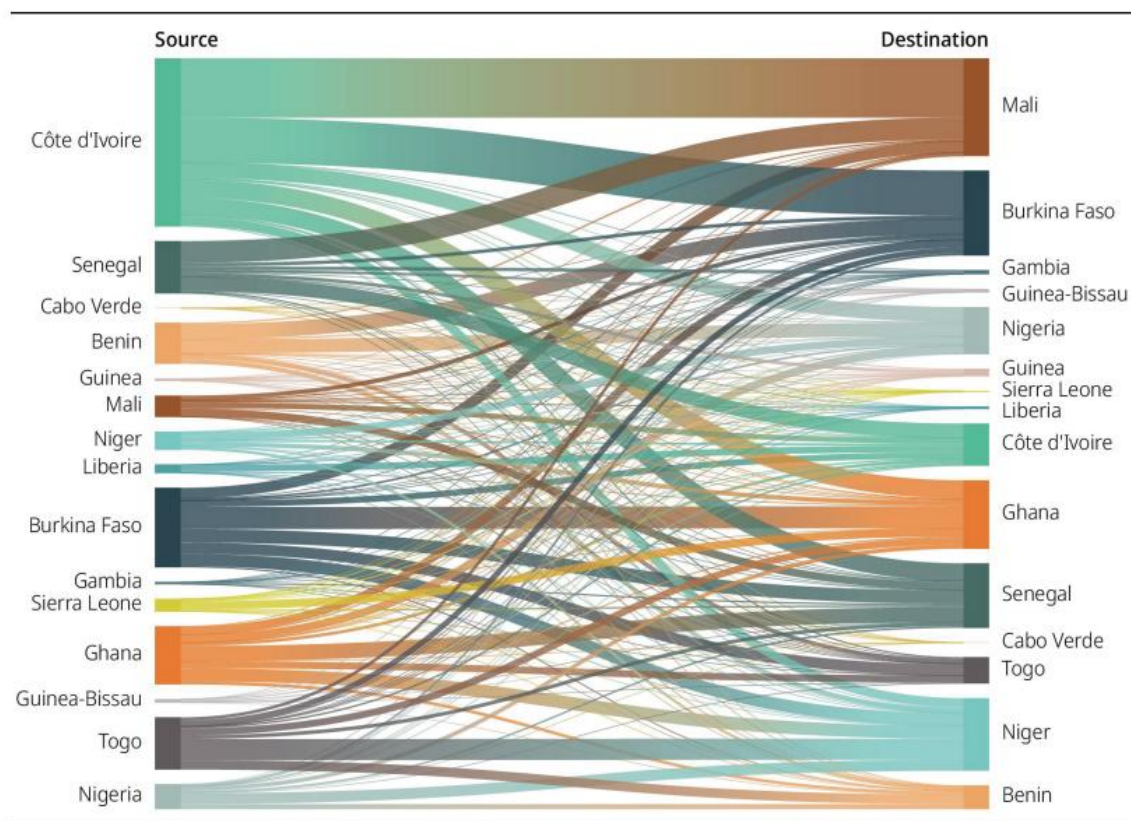


Figure 7. Regional flows of kilocalories, 2014-2022 average. Source: OECD/SWAC, 2025

INTRA-REGIONAL FOOD TRADE SUPPORTS YEAR-ROUND MARKET SUPPLY ACROSS TERRITORIES

Beyond its scale and contribution to food diversity, intra-regional food trade plays a key role in ensuring year-round food availability, particularly for West Africa's rapidly expanding urban centres.

Intra-regional trade supports market continuity during periods of seasonal variation. Agricultural production in West Africa is highly seasonal, reflecting the predominance of rain-fed systems and limited access to irrigation and storage infrastructure. Regional trade enables food supplies to be reallocated across countries and seasons in response to changing availability. Evidence from Ghana illustrates this mechanism: during the domestic tomato peak season, Tamale's tomato supply is sourced entirely from within the country⁶, while in the lean season up to 90% of tomatoes are imported from Burkina Faso, ensuring continued availability and limiting seasonal price pressures (1).

Intra-regional food trade also strengthens resilience to localised production shocks. When adverse weather events, pests, or other shocks affect specific production areas, cross-border trade allows supply to adjust through regional markets, helping to prevent acute shortages and stabilise prices (13).

⁶ Tamale is the capital of Ghana's Northern Region and one of the country's largest urban centers. It is commonly identified as Ghana's third-largest city, with a metropolitan population of approximately 375,000 based on the 2021 national census. The city serves as the principal administrative, economic, and commercial hub for northern Ghana.

This resilience reflects lower production variability at the regional level than at the national level. For example, cereal production variability in The Gambia has been estimated to be up to 70 times higher than that of aggregated African supply, underscoring the stabilising role of regional market integration (14).

Finally, intra-regional trade is increasingly central to supplying West Africa's major consumption hubs. Rapid urbanisation has pushed food demand beyond the capacity of nearby production zones, increasing cities' reliance on regional supply chains and cross-border flows. In 2020, 52% of the region's population lived in urban areas, and the number of urban agglomerations with more than one million inhabitants is projected to rise from 31 in 2020 to 43 by 2035 (1). City-level data highlight the scale of this reliance: in Bamako and Ouagadougou, intra-regional trade accounts for around 30% and 23% of total food supplies, respectively (1). For several key food items, intra-regional imports account for a substantial share of consumption, including plantain (97%), avocados (96%), yam and fish (67%), and cassava (50%), highlighting the central role of regional trade in sustaining diverse and affordable urban diets (Figure).

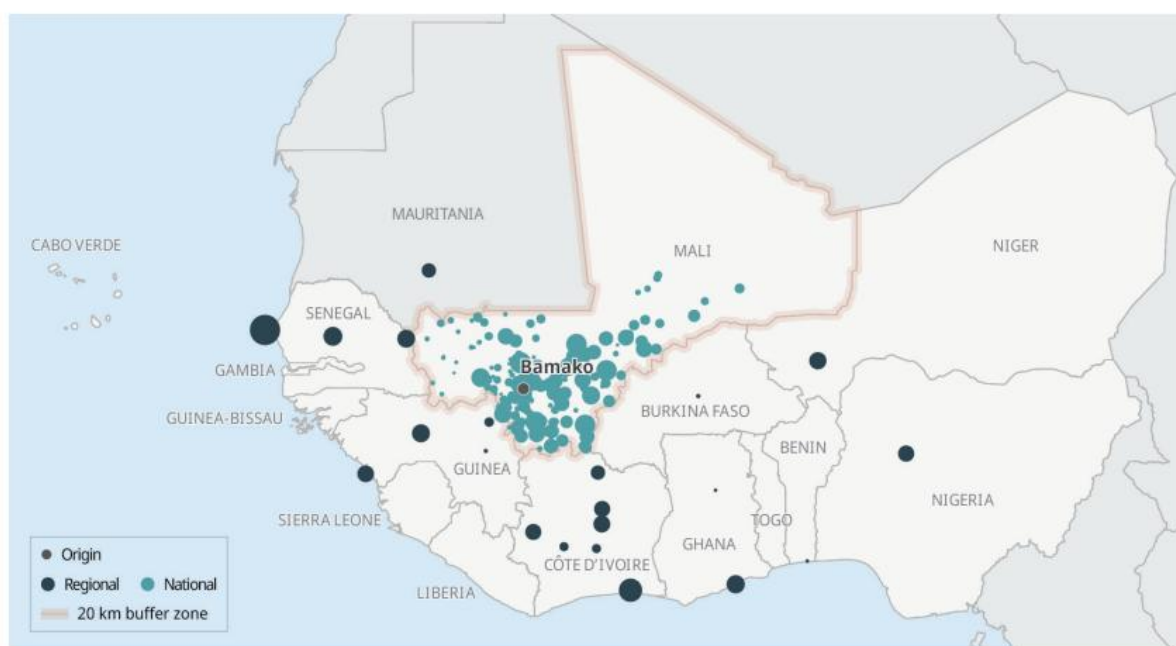


Figure 8. Origin of food entering Bamako during a single week. *Source: OECD/SWAC 2025.*

THE DIET-QUALITY EFFECTS OF TRADE ARE MEDIATED BY FOOD ENVIRONMENTS

While intra-regional food trade can expand the availability and seasonal regularity of diverse foods, this does not automatically translate into healthier diets. In West Africa, the diet effects of trade are mediated by household purchasing power, relative prices, and the wider food environment. Recent OECD/SWAC analysis (15) shows that diets in the region are diversifying, but unevenly across households: wealthier households tend to consume more animal-source and other nutrient-dense foods, while poorer households face tighter affordability constraints and remain less able to access these foods regularly. As a result, the more nutritious foods made available through regional trade may remain economically out of reach for a significant share of consumers.

These constraints are reinforced by changing food retail environments. Urban households increasingly source food from a plurality of outlets, including open-air markets, stores, kiosks, and street vendors, and the foods available vary across them. Evidence from Mali and Senegal shows that fresh and perishable foods remain concentrated in open-air markets, while other outlets play a larger role for some packaged and convenience products (15). Proximity also matters: where access to open-air markets is less convenient, households may shift towards nearer outlets, such as kiosks and street vendors, with a different product mix, often favouring more shelf-stable and processed foods over fresher alternatives (15).

In this context, intra-regional trade can facilitate access to nutritious foods by increasing their availability and, in some cases, moderating prices through expanded supply and seasonal smoothing. However, it can also increase access to cheaper processed and ultra-processed products with longer shelf life, and the relative affordability of more nutritious foods may still remain beyond the reach of the poorest households.

IMPROVING REGIONAL TRADE POLICIES TO INCREASE DIET QUALITY IN WEST AFRICA

It emerges from the prior section's analysis that trade, whether inter- or intra-regional, has considerable potential to support improved nutrition through increasing access to healthy diets for all – but it also has the potential to detract from achievement of this goal. Policies can play an important role in amplifying the positive effects and counteracting the negative ones – and thus in steering trade to play a stronger role in increasing diet quality. These relationships are summarised in Figure 9. The next subsections explore the effects of trade policies on diet quality in more detail, while the following section explores recommendations for strengthening regional trade to better support improved diet quality in the West Africa region.

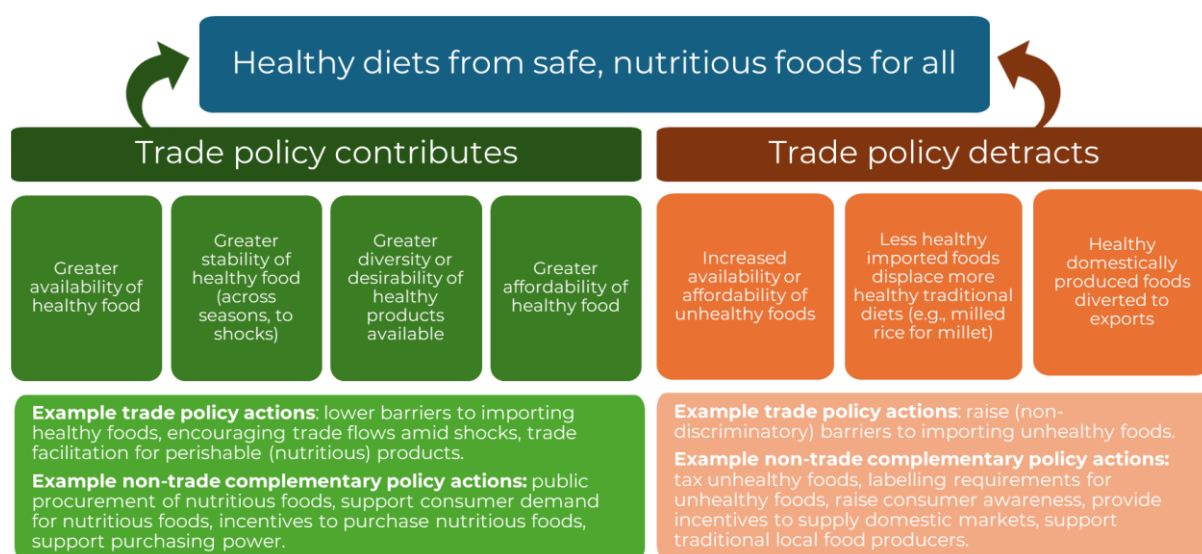


Figure 9. How Trade can Contribute to or Detract from Improving Diet Quality

THE EFFECTS OF REGIONAL TRADE POLICIES ON DIET QUALITY

Regional trade policies (Box 2) shape diet quality through multiple interrelated channels, affecting what foods are available, at what price, and with what degree of stability over time.

These effects can be both positive and negative. Policies that increase trade openness – for instance lower import tariffs – can benefit diet quality by increasing the supply of healthy foods, such as fruits and vegetables, that may be scarce, costly or of variable quality domestically. At the same time, greater openness may also facilitate inflows of unhealthy foods, potentially undermining nutrition objectives, particularly in countries with high import dependency (2,16–18).

Overall, trade openness has been associated with increased availability of micronutrients in national food supplies (2). Conversely, policies that restrict trade can reduce food diversity and availability, with negative implications for diet quality, although restrictions applied specifically to imports of unhealthy foods may also generate nutritional benefits.

BOX 2. DEFINING REGIONAL FOOD TRADE POLICIES

Food trade policy encompasses a broad set of instruments, including tariffs, quotas, export taxes; sanitary and phytosanitary measures, standards, labelling regulations, and other ‘technical barriers to trade’; rules governing public procurement; procedures for transport and clearance of goods at customs checkpoints; and policies shaping trade-related infrastructure, such as transport and storage routes (19). Many of these instruments tend to impose higher barriers on food and agricultural products than on other goods, creating distortions that can limit food flows across countries (20).

In addition, policies outside the trade domain, notably in agriculture, health, and environment, can also shape intra-regional food trade dynamics. For instance, producer subsidies designed to incentivize domestic production of staple foods may reduce incentives to import certain foods or encourage exports, with implications for domestic food availability and prices.

TRADE AND DIET QUALITY: POLICY COHERENCE ANALYSIS

The relationship between trade policies and diet quality in West Africa can be examined in greater details using the recently developed Food Systems Policy Coherence Diagnostic Tool (21). Based on a combination of policy document review and key informant interviews, the tool has been applied in ten countries across Africa and Asia to assess coherence between six food system policy domains (including trade policy) and ten food system objectives (including healthy diets) (22,23) – although they are not specific to *intra-regional* trade policy.

Results are available for two West African countries, Benin and Nigeria. In both cases, trade policies were assessed as *moderately coherent* with the healthy diets objective. While both

countries apply tariffs to imports of nutritious foods — such as fruits, vegetables, and legumes — these are relatively low. Neither country imposes barriers on the importation of equipment or inputs used for large-scale food fortification, and both apply tariffs to certain less healthy food products, such as those high in salt, fat, or sugar.

At the same time, the analysis highlights scope for strengthening alignment. In both countries, further reductions in tariffs on nutritious foods could enhance access and affordability. In Benin, additional gains could be achieved by lowering tariffs on inputs used in the production of nutritious foods, such as seed, and by strengthening nutrition labelling requirements within technical barriers to trade (TBT) measures. In Nigeria, improvements in fast-track import clearance procedures for perishable foods, including fruits and vegetables, could reduce losses and improve the availability of nutrient-rich foods.⁷

LOOKING FORWARD: KEY TRADE POLICY LEVERS FOR HIGHER QUALITY DIETS

Looking ahead, a range of trade-related policy levers can be mobilised to strengthen the contribution of intra-regional food trade to healthier diets in West Africa. These levers extend beyond tariff reduction to include the design and enforcement of regional trade rules, regulatory convergence, infrastructure and logistics, access to information and public services, institutional coordination, and improved data systems.

IMPLEMENTING AND ENFORCING REGIONAL TRADE AGREEMENTS

Regional trade agreements provide a critical policy framework for unlocking intra-regional food trade, particularly for countries that face constraints in accessing global markets (20). Two agreements are especially relevant to West Africa: the African Continental Free Trade Area (AfCFTA) and the ECOWAS Trade Liberalization Scheme (ETLS).

The AfCFTA covers 54 of 55 African countries and aims to create a single continental market through the gradual removal of tariffs, including on several food items. While its potential to boost intra-regional food trade is substantial, implementation has progressed slowly since the agreement process launch in 2021. As of January 2026, all countries in West Africa had ratified the agreement, bar Benin, but it has yet to be operationalized in regional and national policy frameworks of West Africa. Evidence from recent OECD/SWAC public–private dialogues with regional food companies suggests that, to date, food traders have seen limited impact of the AfCFTA on their day-to-day operations (24).

By contrast, the ETLS is a long-standing and more mature framework. Agreed in 1979, it provides for the removal of tariffs on agricultural and locally processed food products among the 12 ECOWAS member states. Despite this, implementation remains uneven. ECOWAS governments continue to adopt import restrictions and export bans on food and agricultural products traded within the ETLS area, often with the stated aim of protecting domestic industries or safeguarding food availability (1). These measures contravene ECOWAS regulations, and their benefits are unclear—particularly in the case of export bans,

⁷ Across all 10 low- and middle-income countries analysed using the Policy Coherence Diagnostic Tool, trade policy generally exhibits comparatively low coherence with food system objectives—the weakest overall performance among the six policy domains analysed. More information on the method and results can be found at: <https://www.gainhealth.org/policy-coherence-toolkit>

which are associated with trade disruptions, depressed farm-gate prices and increased uncertainty for producers, contributing to supply volatility and food inflation.

There is therefore scope for ECOWAS and its member states to strengthen compliance with regional trade rules. ECOWAS could make more systematic use of existing enforcement and coordination mechanisms, including mediation through the ETLs Task Force, peer pressure and reporting tools such as digital non-tariff barrier (NTB) monitoring systems. Benchmarking approaches—such as the ECOWAS Agriculture Trade and Market Scorecard—could further enhance accountability by clearly distinguishing between strong and weak performers (1). These tools could also be used more strategically to support diet quality objectives, for example by tracking barriers affecting the regional trade of nutritious foods, prioritising the removal of NTBs affecting such products, and integrating nutrition-sensitive indicators into regional monitoring frameworks.

ENHANCING REGULATORY CONVERGENCE

Beyond enforcement, greater regulatory convergence is essential to reduce trade costs and facilitate food flows. Harmonising trade regulations within ECOWAS could cut trade costs by up to 30% and unlock hundreds of millions of dollars in additional intra-regional trade (25). Aligning regional regulations with international standards would also improve the competitiveness of ECOWAS food firms in external markets, with positive spillovers for regional trade.⁸

At present, inconsistent and sometimes abusive use of non-tariff measures within the region remains a major obstacle. West Africa's food traders face significantly higher compliance costs than in other regions, driven by fragmented documentation requirements and non-harmonised standards, such as axle-load limits, vehicle inspections and phytosanitary certificates, which increase administrative burdens and delays at borders (1).

From a nutrition perspective, regulatory convergence should explicitly support the flow of healthy, minimally processed and safe foods, while limiting incentives for the proliferation of less healthy, highly processed products. Evidence suggests that excessively strong sanitary and phytosanitary (SPS) provisions can facilitate trade in ultra-processed foods – on the other hand, nutrition labelling and related technical barriers to trade (TBTs) can slow their growth relative to less processed foods (2).

IMPROVING TRADE INFRASTRUCTURE AND FOOD LOGISTICS

Physical infrastructure and logistics remain binding constraints on intra-regional food trade in West Africa. Notably, poor road quality, limited cold-chain capacity and inadequate storage facilities disproportionately affect nutrient-rich and perishable foods, such as animal-source products and fresh fruits and vegetables (27,28).

Improving road infrastructure is one of the most effective ways to strengthen regional food supply chains. Major corridor projects, such as the USD 15 billion planned upgrade of the

⁸ Experience from the East African Community suggests that institutional and procedural integration at borders can yield substantial gains: one-stop border posts have sharply reduced crossing times on some corridors, including by 72% in one direction at the Kobero/Kabanga border between Burundi and Tanzania. Similar approaches could help reduce delays and uncertainty for food traders in West Africa, particularly for perishable products (26).

Lagos–Abidjan corridor into a six-lane expressway by 2030, offer opportunities not only to improve mobility but also to support agro-processing and logistics hubs that reinforce regional food value chains. This could benefit Côte d'Ivoire, Ghana, and Nigeria in particular, which already account for an estimated USD 6 billion worth of intra-regional food trade.

However, transport inefficiencies are not limited to hard infrastructure. The proliferation of illegal control points along trade corridors imposes substantial financial and time costs on food traders, particularly for perishable goods. These costs are ultimately passed on to farmers through lower prices and to consumers through higher food prices, undermining affordability, and intensifying food inflation. Reducing such barriers is essential to improving the competitiveness and accessibility of regional food.

Beyond roads, policies should support the development of higher-quality logistics services, including transport, storage, processing, and packaging. Strengthening the private logistics ecosystem would benefit small and medium-sized food businesses, which often lack the resources to manage their own distribution networks. Improved logistics could also reduce post-harvest losses, currently estimated at around 40% of food produced in Africa, thereby increasing the availability of nutritious foods and helping to stabilise prices (14).

IMPROVING ACCESS TO MARKET INFORMATION AND PUBLIC SERVICES TO TRADE

Regulatory opacity and weak public services further constrain intra-regional food trade. Fragmented and inconsistent rules force traders to rely on informal networks and intermediaries, raising costs and discouraging market entry. Improving access to clear, reliable, and up-to-date trade information is therefore a critical complement to regulatory reform.

National governments and ECOWAS could consolidate trade regulations into centralised, user-friendly platforms that provide real-time information on requirements, procedures, and policy changes. Reviving and streamlining regional tools such as the ECOWAS Trade Information System could significantly reduce information asymmetries and entry barriers, particularly for smaller traders.

Restoring confidence in public institutions is equally important. One-stop trade facilitation centres and electronic single-window systems, such as Nigeria's National Single Window Initiative launched in 2024, can simplify procedures, reduce delays, and limit opportunities for rent-seeking. More transparent and service-oriented public administrations would encourage businesses to engage in regional markets, rather than diverting trade domestically, extra-regionally or through informal channels.

STRENGTHENING INSTITUTIONAL COHERENCE BETWEEN TRADE AND NUTRITION POLICIES

Trade and nutrition policies often operate in silos, with limited coordination between ministries of trade, agriculture, and health. This can lead to conflicting policy signals—for example, trade facilitation measures that increase the availability of processed foods alongside public health efforts aimed at reducing their consumption. Ensuring that trade policies support healthier diets requires stronger coordination across policy domains. Mechanisms such as cross-ministerial working groups, systematic review of trade policies by health and nutrition authorities, and structured stakeholder consultation could help align trade objectives with the objective of increased diet quality (21).

Several African countries, including Nigeria and Benin, have begun to develop such mechanisms as part of follow-up to the United Nations Food Systems Summit (22,23). Strengthening and institutionalising similar arrangements specifically for trade policymaking would help ensure that nutrition considerations are integrated more systematically into regional and national trade decisions.

STRENGTHENING DATA SYSTEMS FOR MEASURING INTRA-REGIONAL FOOD TRADE AND NUTRITION

Robust data systems are a foundational but often underestimated policy lever. In West Africa, as much as 85% of intra-regional food trade remains unrecorded (1), limiting policymakers' ability to assess the scale, composition and nutritional implications of regional food flows. This reflects not only technical capacity constraints, but also weak institutional incentives, fragmented data responsibilities and limited coordination between customs authorities, statistical offices, and food security institutions.

Strengthening data systems requires a combination of institutional, technical, and regional actions. Priorities include improving incentives for recording food trade at borders; integrating surveys of unrecorded trade into national statistical systems; harmonising data collection methodologies for measuring informal trade across countries; and strengthening collaboration between customs, statistical agencies and nutrition and food security institutions. At the regional level, ECOWAS can play a coordinating role by promoting shared standards, interoperability of data systems, and regular information exchange on both formal and informal trade.

Improved measurement of intra-regional food trade would support more effective trade policy design, more accurate assessments of food availability and diet quality, and better monitoring of food system resilience.

CONCLUSION

West Africa faces a distinct set of diet quality challenges. While consumption of unhealthy, ultra-processed foods remains relatively low compared with other regions of the world, dietary diversity is persistently limited, intake of nutrient-rich foods is insufficient for large segments of the population, and more than half of people in many countries cannot afford a healthy diet. These constraints are closely linked to limited availability and accessibility of fruits, vegetables and animal-source foods, high seasonal variability in supply, inadequate transport, storage and cold-chain infrastructure, fragmented regional markets, and high transaction costs along food supply chains.

This paper has shown that intra-regional food trade already plays a substantial, yet under-recognised, role in addressing some of these challenges. When unrecorded flows are taken into account, regional food trade contributes significantly to caloric adequacy, protein availability and access to a diverse range of nutrient-dense foods. By reallocating food across agro-ecological zones, seasons and markets, intra-regional trade helps stabilise supply and prices, supports urban food systems and mitigates local production shortfalls. At the same time, intra-regional trade flows also include food items associated with unhealthy diets, such as sweetened beverages and unfortified bouillon cubes, highlighting the importance of trade policy choices in shaping nutritional outcomes.

Despite this substantial contribution, intra-regional food trade remains largely invisible in official data and insufficiently integrated into food and nutrition policy frameworks. This disconnect limits the use of trade as a lever to improve diet quality and weakens policymakers' ability to address affordability, diversity, and resilience in food supply. Strengthening the contribution of regional trade to healthier diets therefore requires more effective enforcement of regional trade agreements, greater regulatory convergence, improved transport and food logistics, better access to market information and public services for traders, and stronger institutional coherence between trade, agriculture, and nutrition policies.

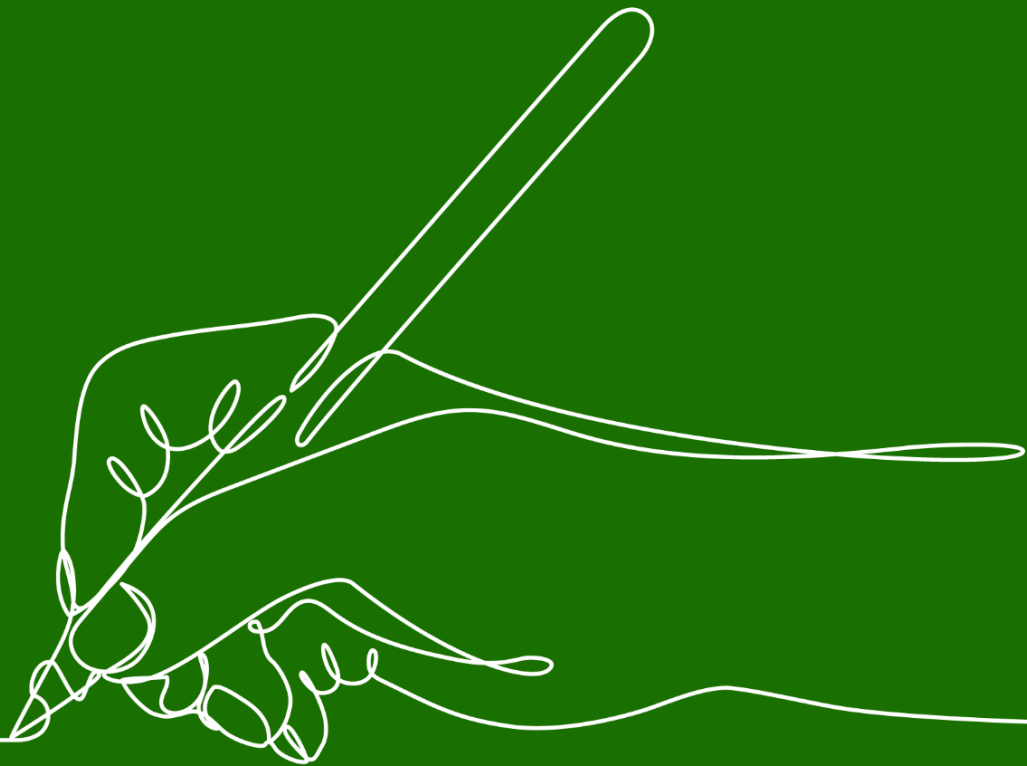
In a context of political instability and evolving regional cooperation, safeguarding open and predictable food trade flows remains essential. Trade policy alone, however, cannot resolve the region's diet quality challenges. Its positive impacts depend on complementary domestic policies that increase purchasing power, reduce the cost of healthy diets, promote consumption of nutritious foods, and limit the growth of unhealthy food environments, and ensure that regional trade contributes more effectively to affordable, diverse, and nutritious diets across West Africa. Without this, there is a risk of overestimating the potential of trade as a standalone lever for improving nutrition outcomes in West Africa.

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ABOUT GAIN

The Global Alliance for Improved Nutrition (GAIN) is a Swiss-based foundation launched at the UN in 2002 to tackle the human suffering caused by malnutrition. Working with governments, businesses and civil society, we aim to transform food systems so that they deliver more nutritious food for all people, especially the most vulnerable.

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