



# **AGRA Position Paper**

**on**

## **Middle East Conflict and Implications for African Food Systems Transformation**

**By**

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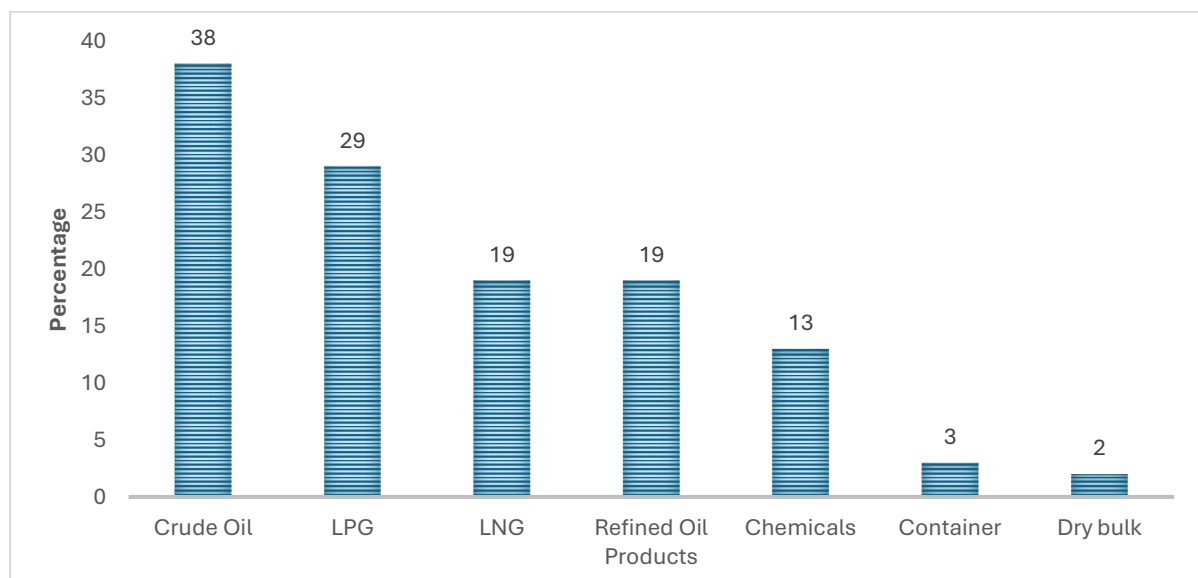
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#### 1. Context and Strategic Framing

The escalation of conflict involving Iran and its spillover across the Gulf represents a profound systemic shock to global food systems. While initial global attention has focused on energy markets, emerging evidence confirms that the disruption is already transmitting across fertilizer supply chains, maritime logistics, and food trade systems in ways that directly threaten agricultural production and food security, particularly in Sub-Saharan Africa. This matters because the current shock is not only an energy shock; it is also an input-access shock, a logistics shock, and potentially a production shock for import-dependent farming systems across Africa (FAO, 2026).

At the centre of this disruption is the Strait of Hormuz, one of the world's most strategic maritime chokepoints. UNCTAD (2026) notes that the strait carries around 38% of world crude oil, 29% of LPG, 19% of LNG, and 20–30% of global fertilizer exports (Figure 1). The near-total disruption of tanker traffic through this corridor has triggered cascading effects across commodity markets. Oil prices have risen sharply, while fertilizer markets deeply dependent on both Middle Eastern exports and natural gas as a feedstock are experiencing significant price volatility and supply constraints. Thus, the significance of this choke point is especially acute for agriculture because it links energy markets directly with fertilizer markets. The global macroeconomic backdrop makes the shock even more serious. According to the WTO (2026), merchandise trade growth is expected to slow from 4.6 percent in 2025 to 1.9 percent in 2026 under its baseline scenario, with the Middle East conflict identified as an additional downside risk through higher energy costs, transport disruption, and pressure on food supplies. This implies that the conflict is hitting at a moment when global trade is already becoming less resilient, making it more likely that local disruption in the Gulf will translate into broader cost increases and supply tightening elsewhere.



**Figure 1: Share of Global Trade Passing through the Strait before military Escalation on 28<sup>th</sup> February 2026**

**Source:** UNCTAD (2026)

The implications are immediate and severe. Analysts warn that the current trajectory mirrors, and may exceed, the global food price shocks observed during the 2022 crisis. For Africa, where structural vulnerabilities persist, including high import dependence for fertilizers, exposure to climate shocks, and constrained fiscal space, the conflict presents both an acute risk and a structural stress test of ongoing food systems transformation efforts.

This position paper therefore frames the Middle East conflict not as a remote geopolitical crisis but as a live stress test for African food systems transformation. It exposes the degree to which African agriculture remains structurally vulnerable to external shocks transmitted through maritime chokepoints, concentrated fertilizer markets, and energy-linked input systems. At the same time, it underscores why resilience can no longer be understood only in terms of seed systems or productivity growth. Resilience must also include fertilizer access, supply-chain diversification, regional trade preparedness, efficient input use, and stronger domestic capability to withstand recurrent global disruptions.

## **2. Transmission Channels: From Conflict to Food Systems**

The effects of the Iran-Gulf conflict on African agriculture are not transmitted directly through battlefield dynamics, but through a set of interconnected global market channels that convert geopolitical instability into rising farm-level costs, tightening input access, and food-system stress. The most important of these channels are energy, fertilizer, trade and logistics. Together, they create a reinforcing shock in which disruption in one system rapidly propagates into the others. This is precisely why the current crisis should be treated not as a temporary commodity disturbance, but as a multi-channel food systems shock with implications for production, trade, prices, and farmer resilience.

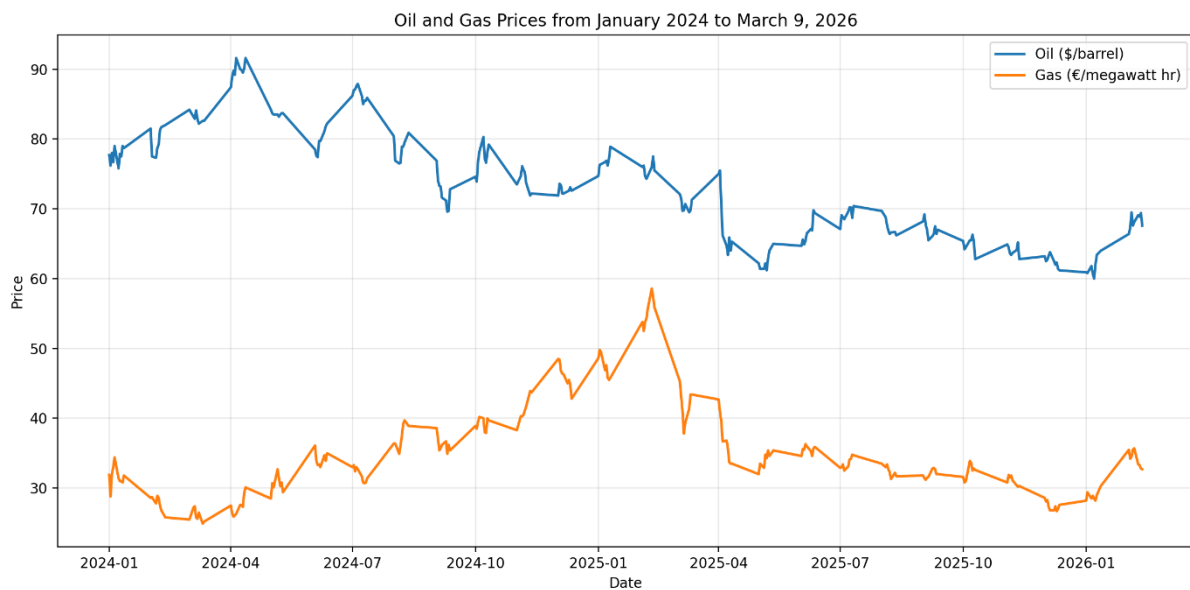
First, the **energy channel**. Oil prices have risen sharply (Figure 2), with some projections suggesting extreme scenarios of further escalation. Rising fuel costs are already feeding into agricultural systems across Africa. It manifests through these channels:

- Higher transportation costs for moving agricultural produce and consumer goods,
- Increased distribution and logistics expenses,
- Rising input costs for producers, including in agriculture and manufacturing.

In South Africa, for example, agricultural producers have warned that diesel shortages and price increases are threatening logistics and export operations, highlighting the sector's dependence on fuel-intensive transport systems. Similarly, in Nigeria, fuel prices have surged dramatically, contributing to broader inflationary pressures, including food prices.

Beyond South Africa and Nigeria, several East and Southern African countries are also experiencing significant fuel price hikes as a result of the Middle East crisis. In Kenya, fuel prices rose by over 15% between February and March 2026, with diesel now selling at more than 220 KES per liter. Tanzania has reported a 12% increase in pump prices, impacting transport and food distribution. In Zambia, fuel prices jumped by 10%, while Mozambique saw a 13% rise, particularly affecting rural supply chains. Ethiopia's government reported a 16% increase in average fuel costs, causing further strain on

agricultural production and household budgets. These dynamics are replicated across many African economies where energy costs directly affect land preparation, irrigation, processing, and transport.

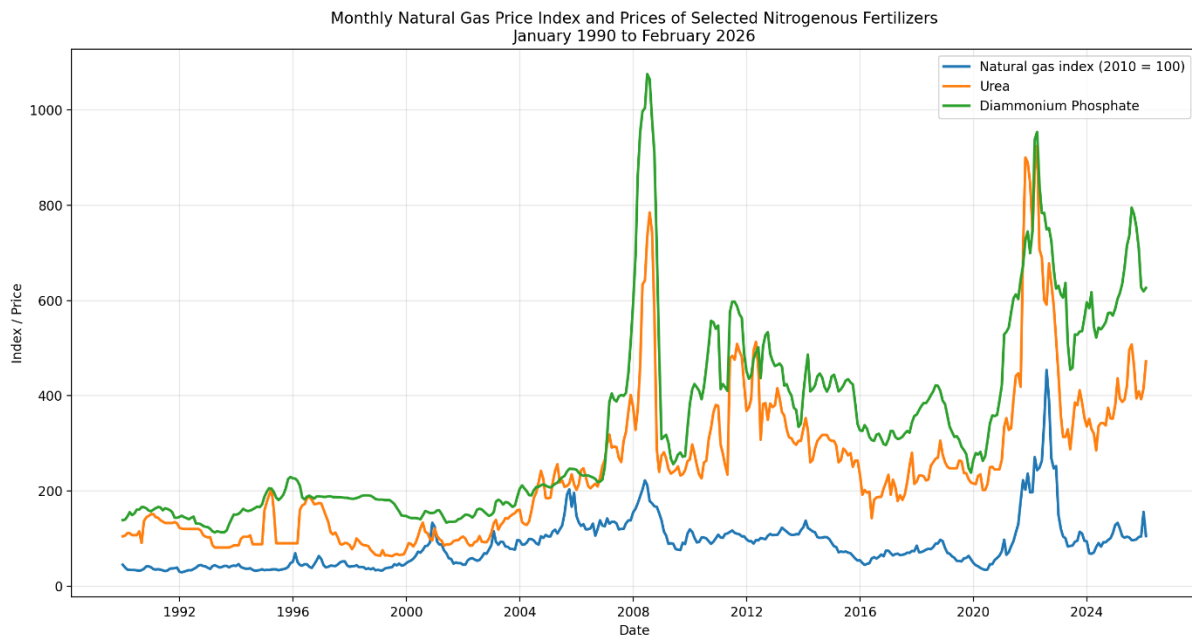


**Figure 2: Energy Markets Immediately React to Strait of Hormuz Reactions**

**Source:** UNCTAD (2026)

Second, **the fertilizer channel**. The Middle East supplies around 30% of the world’s nitrogen-based fertilizers and is also a major source of ammonia, urea, and sulfur. Disruptions to both production and shipping have led to a dual shock: tighter supply and sharply rising costs. Fertilizer prices have already climbed by 30–45% in several African markets since the onset of the conflict. In Nigeria, urea prices have risen by nearly 40% since February 2026, while Ghana has reported a 35% increase in average fertilizer prices. West African farmers are facing similar pressures, with some regions reporting shortages that threaten upcoming planting seasons. The impact is further compounded by higher natural gas prices, which make up a significant portion of fertilizer production costs. Figure 3 shows that fertilizer prices are highly correlated to gas prices as a shock in the gas prices is seen to have always raised fertilizer prices. For instance, the 2008 financial crisis which further caused some geopolitical tensions saw a rise in the gas price index which further raised fertilizer prices. This was again noticed in 2022 at the start of the Ukraine-Russia war which further triggered gas prices and then fertilizer prices.

The price response resulting from the Iran war has already been visible. IFPRI (2026) reports that by 5 March 2026, Middle East urea prices had increased by 19 percent in one week, while U.S. Gulf DAP prices rose by 5 percent over the same period. UNCTAD (2026) similarly observes that fertilizer markets are becoming increasingly stressed as gas prices, bunker fuel costs, insurance costs, and shipping constraints feed through to both fertilizer production and trade. The implication is straightforward: even where fertilizer remains physically available, affordability may deteriorate quickly for import-dependent countries and for financially constrained farmers, a huge concern for Africa.



**Figure 3: Fertilizer Prices Showing Similar Trend to Gas Prices**

**Source:** UNCTAD (2026)

The disruption goes beyond price hikes. Logistical delays during critical planting periods are causing missed opportunities for farmers. Reports from Senegal and Côte d'Ivoire indicate fertilizer shipments are delayed by several weeks, while in Nigeria, over 20% of planned deliveries for March were postponed. In Southern Africa, Malawi has seen fertilizer prices rise by 28% and delays have left smallholder farmers struggling to access inputs before the maize planting window closes. Zambia and Mozambique report similar challenges, with fertilizer shortages and shipment delays threatening to reduce yields for key crops. For smallholders dependent on timely access, these setbacks can mean reduced planting or even missing the season entirely.

There are also signs that the crisis environment is strengthening the business case for local and regional fertilizer manufacturing. For example, Dangote Group is developing a large-scale urea fertilizer project in Gode, Ethiopia, anchored by a reported US\$4.2 billion long-term gas supply agreement to power the plant. Once operational, the investment is expected to reduce Ethiopia's dependence on imported fertilizer and help conserve scarce foreign exchange, while potentially improving supply stability for neighbouring markets over time.

Third, the trade and logistics channel. The disruption of maritime routes has increased freight costs, insurance premiums, and transit times. This is affecting both food imports and agricultural exports. In addition, global supply chains are becoming more fragmented as countries and firms seek alternative routes, often at higher cost. At the same time, the disruption is also reshaping regional port dynamics: in East Africa, Kenya's Lamu Port has reported a notable increase in vessel calls and cargo handling as some operators divert cargo away from more exposed Middle East routes, underscoring how crisis-driven rerouting can both strain and create openings for African logistics hubs.

Compounding these logistical challenges is intensifying global competition for staple food commodities, particularly from major buyers in Asia. Asian economies, which collectively import significant volumes of rice, wheat, and soybeans, are leveraging their purchasing power to secure supplies amid disruptions. For example, Asia accounts for nearly 90% of global rice imports, and its procurement strategies often drive up prices and divert shipments away from less competitive African

markets. In the case of wheat, global demand has surged, with African countries such as Nigeria, Egypt, and Senegal facing higher import costs and occasional shortages. Egypt alone is the world's largest wheat importer, sourcing over 12 million tons annually, while West African nations rely heavily on international markets for maize and rice, making them vulnerable to price spikes and supply constraints.

Sub-Saharan Africa's import dependence is especially acute in East and West Africa, where countries like Ghana, Nigeria, Kenya, and Senegal routinely import substantial quantities of rice, wheat, and maize to meet domestic consumption. In 2025, West Africa imported over 8 million tons of rice and 4 million tons of wheat, while East and Southern Africa imported more than 6 million tons of maize. With global buyers competing for limited stocks, African importers are frequently priced out or subjected to delayed deliveries, threatening food security and exacerbating malnutrition risks. These pressures are further amplified by fragmented supply chains and rising freight costs, creating a precarious environment for food access across the continent.

### **3. System-Wide Impacts: Production, Trade, and Consumption**

These transmission channels converge to affect the three pillars of food systems: production, trade, and consumption.

Agricultural production is the most immediate point of impact. Rising fertilizer prices, higher inputs distribution costs, and delayed access are expected to reduce application rates, particularly among smallholder farmers who already operate at low input levels. In Sub-Saharan Africa, where over 80% of fertilizers are imported, this creates acute vulnerability. Evidence from multiple countries suggests that farmers are already considering reducing planting or switching to lower-input crops. This is likely to result in lower yields and reduced overall production in upcoming seasons. In Kenya, recent projections indicate that maize yields could fall by as much as 15% in 2026 due to input shortages and delayed planting. Similarly, Nigeria is expected to see a 12–18% drop in rice and maize production if fertilizer supply constraints persist through the main planting season. Ghana's Ministry of Food and Agriculture has warned that cereal output could decline by up to 20% in some northern regions, where access to inputs has been most severely disrupted. These anticipated declines in key staples not only threaten national food security but also have broader implications for rural livelihoods and regional grain markets.

For most African countries, which rely heavily on imported food staples, the trade shock is intensifying existing vulnerabilities in agricultural supply chains. The rerouting of shipping away from the Suez Canal to the longer Cape of Good Hope passage has added up to 10 extra days to delivery times and significantly increased freight costs, making imported food items more expensive by raising per-container transport charges. This disrupts the timely arrival of cereals, cooking oils, and other essential food commodities, straining both government procurement budgets and private-sector supply chains. At the same time, mounting currency pressures, driven by global investor flight to safer assets, are causing local currencies to weaken, further inflating the cost of imported food in markets such as Ghana, Kenya, and South Africa. Together, these dynamics risk accelerating food inflation, worsening trade deficits, and deepening food insecurity across the continent.

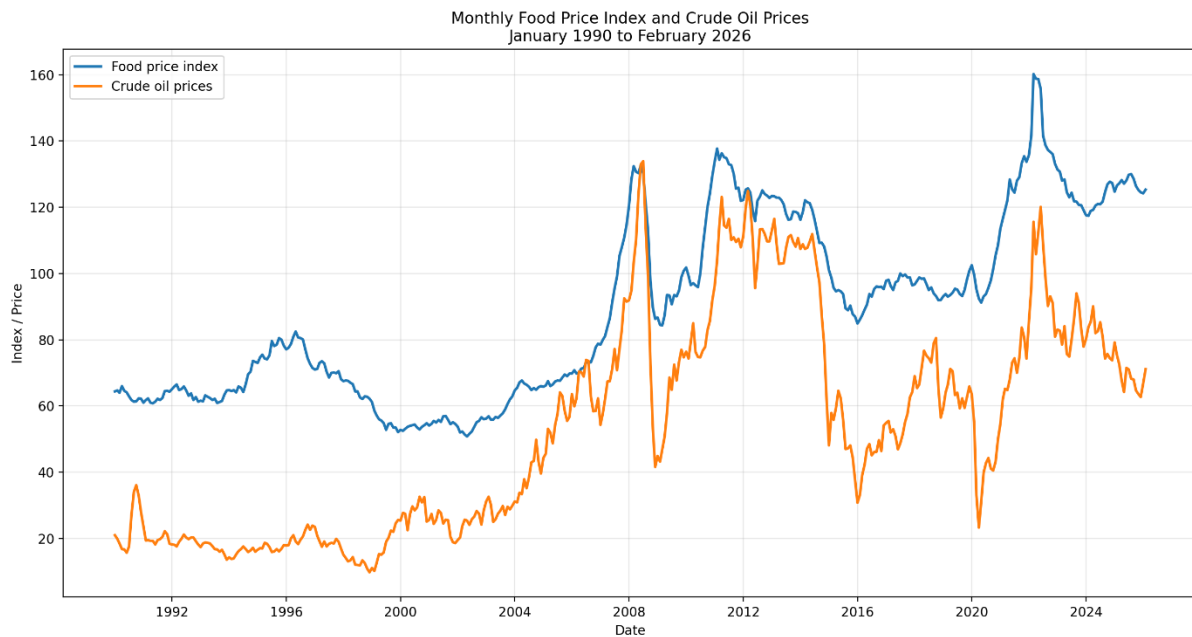
Importantly, the same disruption is also exposing opportunities that have long been neglected. As shipping lines reroute, African ports, corridors, and hinterland logistics services can capture new transshipment and distribution flows—but only if governments and the private sector move quickly to address bottlenecks in customs, storage, last-mile connectivity, and security. In this sense, the Middle

East crisis is not only a threat to food security; it is also a live test of whether African countries can convert external shocks into accelerated investment and reform that strengthens regional trade and resilience.

As the Iran–US war drives up fuel and transport costs across Africa largely due to crude oil prices surpassing \$100 per barrel and widespread supply disruptions, food prices have risen sharply, putting significant pressure on household budgets. In many African countries, where families already spend a high proportion of their income on food, even moderate price increases can quickly erode dietary quality and heighten the risk of malnutrition, especially as transport and input cost spikes reverberate through regional food markets. As such, of key emphasis the eroded welfare resulting from affected household consumption. As input and transport costs rise, domestic food prices come under pressure. This can happen through several routes at once including lower local production, higher import costs, more expensive transport from rural to urban markets, and broader inflation driven by fuel and energy. For poor households, especially in urban areas and food-deficit rural zones, these effects are felt quickly through reduced food affordability and lower dietary quality. FAO (2026) warns that the conflict is increasing the risk of rising food import bills and worsening food insecurity, particularly in countries that are highly exposed to import dependence and external price shocks.

The welfare consequences are especially severe where households already spend a large share of their income on food. In such settings, even relatively small increases in staple food prices can force substitutions away from more nutritious foods, reduce meal frequency, or increase reliance on cheaper and less diverse diets. UNCTAD (2026) notes that rising costs for energy, transport, and food will put additional strain on household budgets in developing economies, while also creating pressure on governments to expand subsidies or social protection at a time when fiscal space is already constrained. This interaction between household stress and public finance is critical. Food systems shocks do not stop at the farm gate or the market. They create downstream effects for nutrition, poverty, and political stability. Where governments cannot fully cushion price increases, households bear the burden directly. Where governments do intervene aggressively, they may face mounting subsidy costs, wider deficits, or more difficult trade-offs between emergency response and longer-term investment in agricultural transformation. The conflict therefore threatens not only current food access, but also the public investment environment needed to sustain future resilience.

Figure 4 further shows that food prices have always been highly correlated to oil prices where spikes in oil prices result in a rise in food prices. The same trend is evident in the onset of 2008 financial crisis and the beginning of Russia-Ukraine war in 2022. The Iran-US war hence poses' threats of driving food costs and intensifying the cost-of-living pressures especially for the most vulnerable.



**Figure 4: Food Prices Increase as Oil Prices Go Up**

**Source:** UNCTAD (2026)

Taken together, the production, trade, and consumption effects reinforce one another. Lower fertilizer access can reduce output. Weaker output and more expensive imports can tighten domestic food supply. Higher energy and transport costs then amplify retail prices, eroding purchasing power and increasing food insecurity. What makes this war particularly serious is that it compounds existing African vulnerabilities rather than replacing them. The conflict is arriving in a context already shaped by climate volatility, macroeconomic strain, debt stress, and persistent dependence on imported agricultural inputs.

For AGRA, the implication is that response strategies cannot be confined to a narrow input-supply lens. The challenge is broader. There exists a need for protecting production incentives, stabilizing trade access, and cushioning household welfare at the same time. This is what makes the current crisis a true food systems shock rather than merely a fertilizer market disturbance.

**4. Intensifying Global Competition and Structural Inequality will leave African Countries worse-off**

Global demand dynamics represent a critical yet often overlooked aspect of the current crisis. Major food-importing regions, particularly in Asia, remain highly vulnerable to disruptions in Middle Eastern energy and fertilizer supplies. As supply constraints escalate, economies with greater purchasing power and advanced procurement mechanisms, such as those in Asia, are increasingly positioned to secure scarce resources, often at the expense of less competitive importers.

This intensifying competition is creating demand displacement, whereby lower-income and import-dependent countries in Africa are priced out of global markets. Historical precedent from past food crises shows that such dynamics exacerbate structural inequalities: poorer nations often face acute shortages and reduced access to essential inputs, even when overall global supply remains sufficient.

These risks are further compounded in the present crisis. Asian economies account for a substantial share of global fertilizer and energy imports from the Middle East, and ongoing disruptions are already impacting their supply chains. As these countries pursue alternative sources to safeguard their needs, global competition is expected to intensify, driving up prices and constraining availability for liquidity-challenged African countries. The resulting effects threaten to deepen existing vulnerabilities and widen disparities in access to agricultural inputs and food.

It is evident that the problem for many African countries is that they enter this competition from a structurally weaker position. UNCTAD's report on African vulnerability to global shocks highlights high debt burdens, commodity dependence, inflation exposure, weak infrastructure, and heavy reliance on external markets as key reasons the continent remains more vulnerable than many other regions. The same report notes that over 50 percent of Africa's imports and exports are tied to just five economies outside the continent, and that only a limited number of African countries source meaningful shares of intermediate goods from within Africa. This means many countries remain exposed to external supply disruptions at precisely the moment when access to globally traded inputs becomes more contested. This asymmetry also extends to food trade. WTO (2026) outlook warns that merchandise trade growth is slowing sharply, from 4.6 percent in 2025 to 1.9 percent in 2026, with the Middle East conflict adding downside pressure through energy prices and transport disruption. In a slower and more uncertain global trading environment, larger importers with deeper reserves are generally better able to withstand temporary price surges and freight bottlenecks. Smaller, import-dependent economies face a harsher reality as they often pay more, receive supplies later, and have less policy room to cushion domestic consumers.

For African food systems, the key risk is that these forms of global competition compound pre-existing structural inequality. Countries with low fertilizer use, limited storage, high borrowing costs, and weak social protection systems are less able to smooth shocks over time. This means a temporary disruption in global supply can produce lasting effects on planting decisions, crop yields, food prices, and nutritional outcomes. Again, higher borrowing costs are adding to the economic burden of the Strait of Hormuz disruptions, which is particularly significant for developing countries already facing debt and financing constraints. There is also a strategic inequality dimension. In moments of global scarcity, the international system rarely allocates essential agricultural inputs according to food security need. Supplies tend instead to flow toward buyers with purchasing power, commercial leverage, and geopolitical weight. This creates a serious risk that African countries, especially low-income and fertilizer-import-dependent economies, will be crowded out of timely access to nutrients and other agricultural inputs just as seasonal demand peaks. FAO's assessment of the 2026 Middle East conflict warns that the agrifood consequences are especially severe for countries heavily dependent on imported food, fertilizer, and fuel, reinforcing the conclusion that vulnerability is shaped not only by exposure to the shock, but by structural position in global markets.

The implication is that the conflict may widen the gap between countries that can protect agricultural production and those that cannot. Wealthier or more strategically positioned economies may respond by diversifying procurement, subsidizing imports, or absorbing temporary losses. Many African governments, however, are far more constrained in their ability to do the same at scale. Unless deliberate action is taken to coordinate procurement, reduce trade friction, support regional supply channels, and protect vulnerable farmers and consumers, the current crisis is likely to reinforce rather than reduce structural inequality in the global food system.

## **5. Time Horizons of Impact**

The effects of the Iran-Gulf conflict on African food systems will not unfold all at once. They are likely to emerge in overlapping time horizons, with immediate disruptions in prices and logistics, followed by production and trade effects over the coming agricultural seasons, and then deeper structural consequences if the shock persists. Distinguishing between these time horizons matters for policy

because the interventions required in the next few weeks are not the same as those needed over the next six to twelve months, nor the same as the structural reforms needed over several years.

### Short-Term Impacts

In the short term, the dominant effects are market volatility, shipping disruption, and sudden increases in the cost of energy-linked inputs. It should be noted that since 28 February 2026, ship movements through the Strait of Hormuz dropped sharply, while oil and gas prices rose rapidly. By March 2026, ship transits fell from around 130 per day in February to just 6 (UNCTAD, 2026), a collapse of about 95 percent, confirming that the disruption was not momentary but severe enough to affect global trade flows within weeks.

For African food systems, the first-round consequences are straightforward. Higher fuel costs increase the price of moving fertilizer from ports to inland markets and the cost of moving food from farms to urban consumers. At the same time, shipping uncertainty raises insurance premiums, freight charges, and delivery delays. FAO (2026) noted that war-risk premiums for vessels using affected routes had risen sharply, in some cases reaching around 10 percent of vessel value, with immediate implications for import costs and route selection. This short-term phase is therefore characterized by a rapid rise in landed input costs, more expensive food trade, and growing uncertainty for importers attempting to secure timely deliveries ahead of planting windows.

Fertilizer markets are especially sensitive in this early phase. Only one week into the shock, Middle East urea prices had already risen 19 percent, while U.S. Gulf DAP prices were up 5 percent (IFPRI, 2026). That kind of immediate reaction matters because farmers and input distributors often make seasonal purchasing decisions under tight liquidity constraints. Even before absolute physical shortages appear, expectations of scarcity and higher replacement costs can prompt delayed purchases, rationing by distributors, or reduced application plans by farmers. In that sense, the short term is defined not only by what is unavailable, but also by uncertainty over what will soon become unaffordable.

### Medium-Term Impacts

. In the medium term, the crisis begins to move from markets into production systems and household welfare. If high fertilizer prices and shipping constraints persist through a planting cycle, farmers may reduce application rates, shift to lower-input crops, reduce cultivated area, or delay planting. These decisions are individually rational, but collectively they weaken aggregate output and increase the risk of tighter domestic food supplies in subsequent months. If shipping disruptions through Hormuz continue, the energy and fertilizer channels could become more consequential for crop production than the initial logistics shock itself, particularly where nitrogen-intensive cropping systems depend on timely fertilizer access.

This medium-term phase is also where trade stress becomes more visible. Import-dependent countries face higher food import bills at the same time that they confront costlier fertilizer, weaker currencies, and tighter fiscal conditions. WTO (2026) already projects global merchandise trade growth slowing from 4.6 percent in 2025 to 1.9 percent in 2026, reflecting weaker demand and rising uncertainty, including from the Middle East conflict. In practice, slower global trade growth means less resilient trade networks and fewer buffers against disruption. For African countries that depend heavily on imported food, fuel, and farm inputs, that environment raises the probability that external price shocks will spill over into domestic inflation and food insecurity over the course of the year.

The medium term is also when pressure on public policy intensifies. Governments may be forced to choose between expanding subsidies, financing emergency imports, cushioning consumer prices, or protecting already constrained public budgets. Higher import costs for energy, food, and fertilizers, combined with tighter financing conditions, are already increasing pressure on developing countries, especially those with limited fiscal space. This means the medium-term risk is not just lower

agricultural output; it is also weaker policy capacity to respond once the social effects of higher food prices become more visible.

### Long-Term Impacts

Over the long term, the crisis threatens to entrench structural weaknesses within African food systems. The most important of these is a stronger recognition that dependence on imported fertilizers, distant shipping corridors, and concentrated global suppliers is itself a strategic vulnerability. Economies heavily dependent on imported energy, fertilizers, and staple foods are more exposed to repeated shocks of this kind. Over time, recurrent disruption could alter investment decisions, procurement strategies, and the policy rationale for domestic blending, regional input production, strategic reserves, and improved intraregional trade connectivity.

The long-term risk is therefore not limited to temporary hardship. Repeated global shocks can slow productivity growth, discourage input adoption, and reinforce low-input equilibrium traps in smallholder agriculture. If farmers come to expect that fertilizers will remain volatile, unaffordable, or unreliable, the result may be chronic underinvestment in soil fertility and weaker production growth over time. At the macro level, repeated import shocks can also worsen debt stress, weaken exchange rates, and crowd out investment in the very infrastructure and market systems needed for food systems transformation.

For AGRA, this longer horizon is critical. The current crisis should be understood not only as an emergency to manage, but as evidence of why resilience must be built into the architecture of African food systems transformation itself. In practical terms, that means combining short-run crisis response with medium-run market stabilization and long-run structural reform aimed at reducing exposure to imported input shocks and fragile trade corridors. **6. Strategic Implications for AGRA**

For AGRA, the current crisis underscores the urgency of bridging short-term response with long-term transformation. The organization's mandate—to support inclusive, resilient, and sustainable food systems—requires a dual approach that addresses immediate shocks while accelerating structural change.

The evidence suggests that without intervention, the current crisis could reverse gains in productivity, increase food insecurity, and undermine farmer resilience across multiple countries. At the same time, it presents an opportunity to catalyze investments in domestic capacity, regional integration, and sustainable production systems.

## 7. Strategic Recommendations for Food Systems Resilience driven by AGRA

### 7.1 Immediate Term Interventions

#### *Production and Climate Risks/Interventions – CASAR, CESSA and Country Directors*

- Support governments to ensure timely access to fertilizers through targeted subsidies, emergency procurement, and improved distribution systems.
- Promote efficient fertilizer use by encouraging soil testing and precision application to maximize productivity under constrained supply conditions.
- Directly support smallholder farmers with input packages and advisory services.
- Encourage climate-smart input use to optimize yields amid environmental uncertainties.

### ***Aggregation, Logistics, and Trade - IMTF and Country Directors***

- Support evidence generation, fertilizer price tracking and creation of awareness on the evolving nature and impact of the conflict through knowledge management products such as the Food Security Monitor
- Build out additional fertilizer and food price data points and popularize the use of the AGRA supported digital Regional Food Balance Sheet run by COMESA
- Strengthen structured market systems to reduce transport and transaction costs, facilitating efficient movement of inputs and outputs.

### ***Policy and Influencing – PIATA, PSC and Country Directors***

- Coordinate emergency response policies focused on input access and price stabilization.
- Activate partner engagements through PIATA, Food Trade Coalition for Africa, the AFSF and other platforms to bring this matter into focus and co-create solutions.

## **7.2 Medium Term Interventions**

### ***Production and Climate Risks/Interventions – CASAR, CESSA and Country Directors***

- Invest in regional fertilizer production and blending capacity to reduce dependency on external inputs.
- Expand access to climate-resilient seeds and promote diversified farming systems to build adaptive capacity.
- Promote adoption of climate-adaptive practices and technologies through extension and capacity-building programs

### ***Aggregation, Logistics, and Trade – IMTF and Country Directors***

- Strengthen intra-African trade systems to improve the movement of food and agricultural inputs across borders.
- Promote adoption of trade facilitation measures such as STRs, MRAs and addressing NTBs along key food corridors

### ***Policy – PSC and Country Directors***

- Develop and harmonize regional policies to facilitate trade, streamline standards, and reduce non-tariff barriers.
- Reduce government interventions in markets to lower cost of food
- Strengthen government capacity to use data-driven decision-making for food trade and market stability (e.g., routine use of price, stocks, and corridor performance data to trigger timely, rules-based actions).
- Support implementation—not only policy design—by helping ministries operationalize reforms through clear regulations, inter-agency coordination, implementation roadmaps, and performance tracking (including public reporting where appropriate).

- AGRA must ramp up joint advocacy and influencing efforts to support policy and regulatory reforms, trade facilitation mechanisms and incentives that bolster resilience of food markets, support private sector to expeditiously and more cheaply import needed fertilizers and other soil fertility technologies while safeguarding small farmers exposure to increased fertilizer prices

### 7.3 Long Term Interventions

#### *Production and Climate Risks/Interventions – CASAR, CESSA and Country Directors*

- Integrate climate resilience into all aspects of food systems planning, infrastructure development, and supply chain management.
- Transition toward integrated soil fertility management systems to decrease reliance on imported fertilizers and enhance soil health.
- Invest in renewable energy solutions for agricultural production to support sustainable intensification.

#### *Aggregation, Logistics, and Trade – IMTF and Country Directors*

- Develop resilient regional supply chains, with a strategic focus on establishing and expanding Africa Food Corridors that link production hubs to markets, strengthen food sovereignty, and buffer against future shocks.
- *The Africa Food Corridors Initiative presents a transformative opportunity to enhance food systems resilience by integrating infrastructure, investment, and policy across borders. By connecting regions with high agricultural potential to major consumption centers and export markets, these corridors will facilitate efficient aggregation, storage, and trade. This approach will not only mitigate risks from supply disruptions but also drive economic growth, foster regional integration, and position Africa as a leader in sustainable food systems transformation.*

#### *Policy – PSC and Country Directors*

- Deepen public–private partnerships such as with Trade Mark Africa and align regional policies to mobilize large-scale investments and enable coordinated responses to systemic risks.

## 8. Conclusion

The Middle East conflict represents a systemic shock with far-reaching implications for global and African food systems. Its effects are already being felt across energy, fertilizer, and trade systems, with direct consequences for agricultural production and food security.

For Africa, the crisis is both a warning and an inflection point. Without decisive action, it risks exacerbating existing vulnerabilities and reversing progress. With coordinated and strategic intervention, however, it can serve as a catalyst for accelerating the transition toward more resilient, self-reliant, and sustainable food systems.

AGRA’s role in this moment is to provide leadership, align partners, and support governments in navigating immediate risks while advancing long-term transformation. Engagement with partners

should translate to resource/fund reallocations to focus on immediate needs of farmers and governments.

Yet repeated global shocks—from the COVID-19 pandemic and the 2022 food price surge to the current Middle East conflict—suggest that Africa is still not learning fast enough to close long-standing systemic gaps in input dependence, trade logistics, storage, and risk financing. The opportunity, however, remains clear: each crisis strengthens the case for investing in domestic and regional fertilizer and energy solutions, modernizing ports and corridors, expanding strategic reserves, and accelerating intra-African trade and policy reforms that can reduce exposure to external disruptions and strengthen food sovereignty.

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