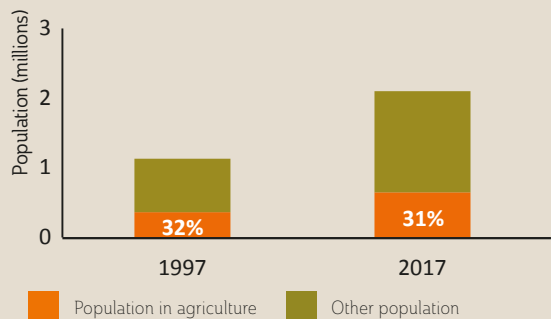
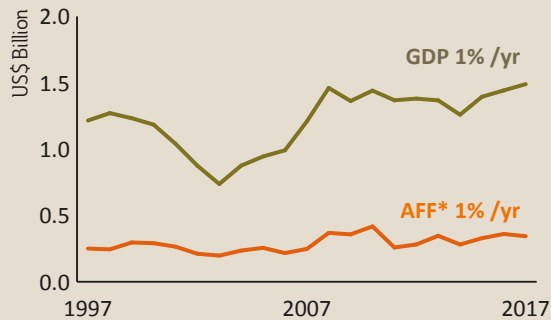




MACROECONOMIC CONTEXT

The Gambia is a small economy relying primarily on tourism, rain-dependent agriculture and remittances. Agriculture accounts for about a quarter of GDP and employs 70% of the labour force. Multiple shocks including droughts and the 2014/15 Ebola crisis in the subregion have caused both agriculture and tourism to shrink in recent years.⁵

The Gambia is classed by the World Bank as a low-income country and has a low Human Development Index (ranked 174 of 189 countries).



* AFF: Gross Output Agriculture, Forestry and Fishing

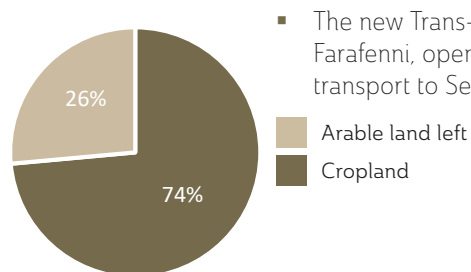
FOOD PRODUCTION

Top horticultural crops* (000 tons, 2017)

1	Groundnuts	110	5	Cashew	3
2	Other veg.	13	6	Other pulses	3
3	Cassava	11	7	Mangoes	1
4	Other fruit	9			

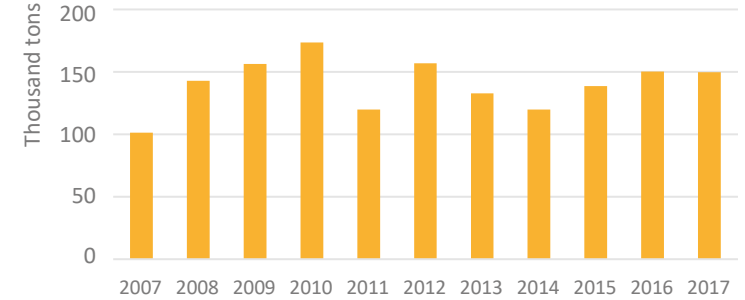
The Gambia's comparative advantages

- According to Gambia's Agriculture and Natural Resources Policy, horticulture is rapidly emerging as a key growth area of the economy, contributing about 4% to GDP.¹
- Agriculture is listed as a strategic priority in the country's National Development Plan (2018–2021), with a focus on increasing production and enhancing value chains for agro-processed products.²
- The gradual introduction of hybrid varieties is contributing to developing year-round production.
- The new democratic government from 2017, committed to the rule of law and human rights, has brought political stability, more investment and openness to new markets. The Gambia has now regained its AGOA trade agreement with the USA, which was withdrawn in 2015.³
- The expansion in cold storage and dry cargo facilities at Banjul Airport gives an extra advantage to exporters.⁴



*Some categories are grouped.

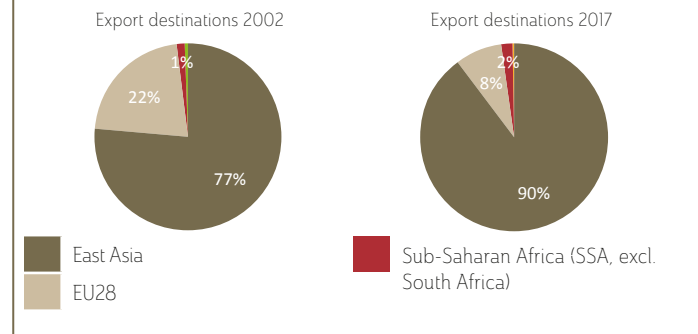
Trends in fruit and vegetable production



TRADE

The Gambia has an increasingly negative trade balance for fruit and vegetables – in 2017 it imported 17,910 tons more than it exported.

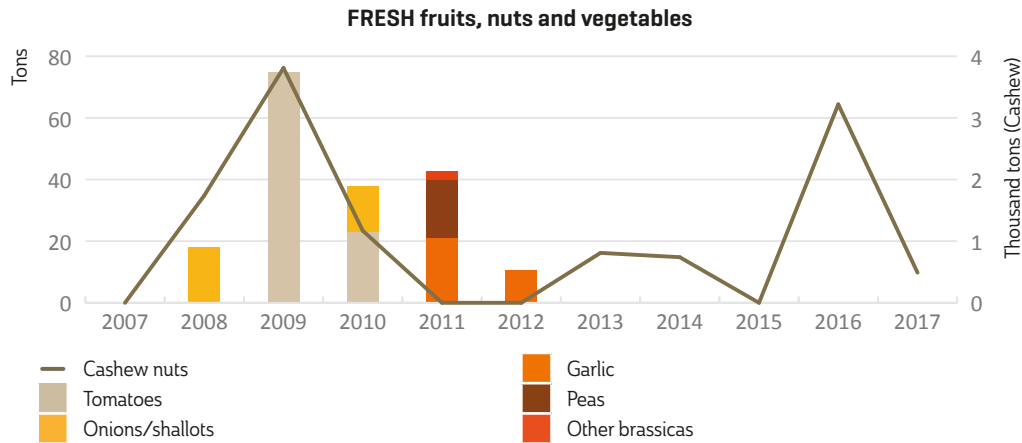
Exports are mainly to East Asia, representing 90% of the quantity and 92% of the value of all exports; exports to the EU are 8%. The bulk of exports are cashews, followed on a smaller scale by mangoes (the main crop exported to the EU), fresh beans and peppers.



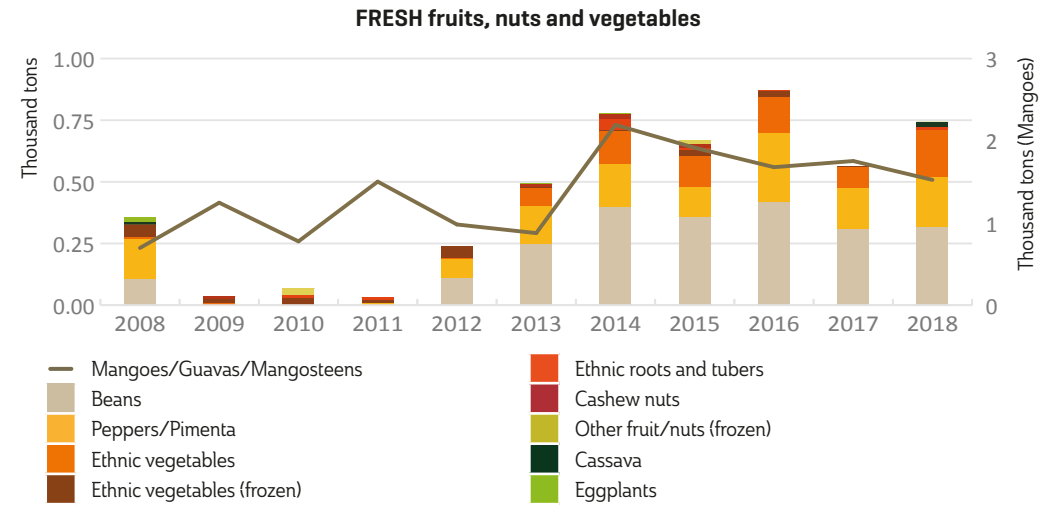


EXPORTS OF FRUITS, NUTS AND VEGETABLES: REGIONAL AND EUROPEAN MARKETS (BY VOLUME)

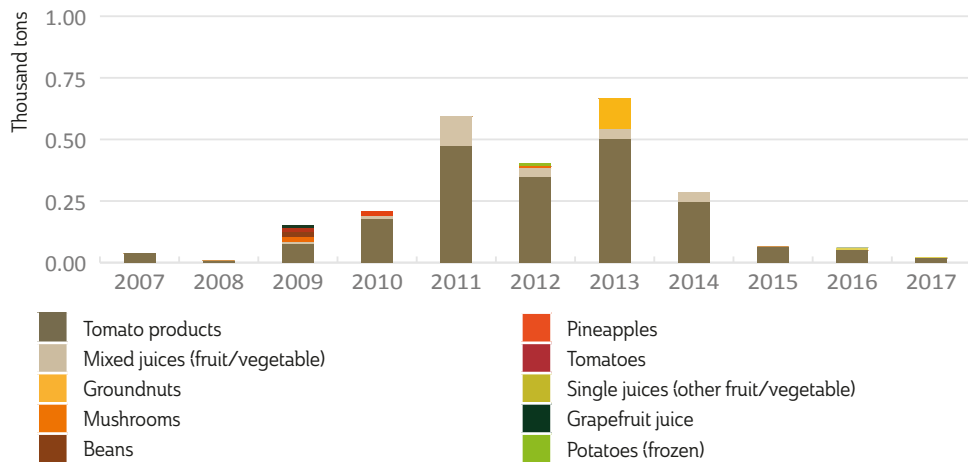
EXPORTS TO SSA



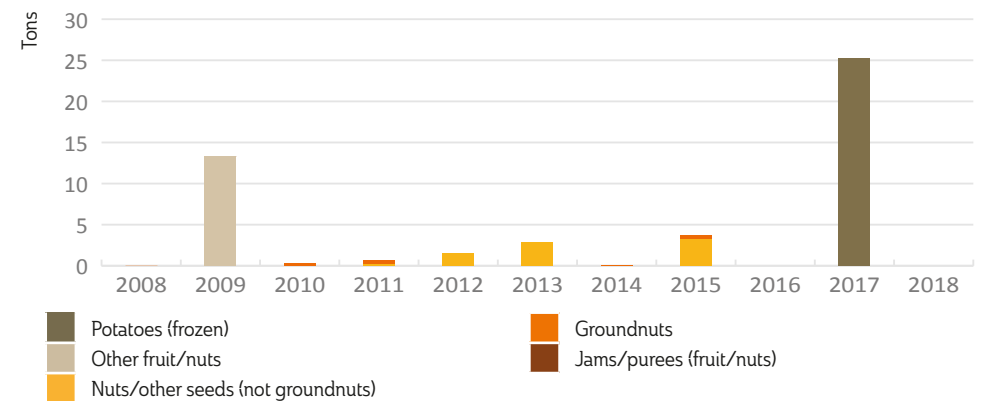
EXPORTS TO EU28



PROCESSED fruits, nuts and vegetables



PROCESSED fruits, nuts and vegetables





FOCUS ON THE MARKET

Supply

Output in the agricultural sectors is growing steadily, but current output levels only meet 50% of the country's food needs.²

Horticultural crops (e.g. tomatoes, onions, cabbage, eggplant, okra, salad vegetables, beans, citrus, mangoes, cashew, papaya, banana) are mostly grown in smallholder plots and communal gardens mainly managed by women. Crop yields are generally low.

The African Development Bank's Peri-urban Smallholder Improvement Project has been promoting cassava and sweet potato as favourable crops for enhanced food security.⁷

Demand

With 176 people per km², The Gambia is one of the most densely populated countries in Africa, with 57% in urban and peri-urban centres.¹ A 2010 study noted that consumption of fresh fruit and vegetables has increased, with vitamin A-rich vegetables and fruits consumed by three-quarters of households.⁸

Key facts

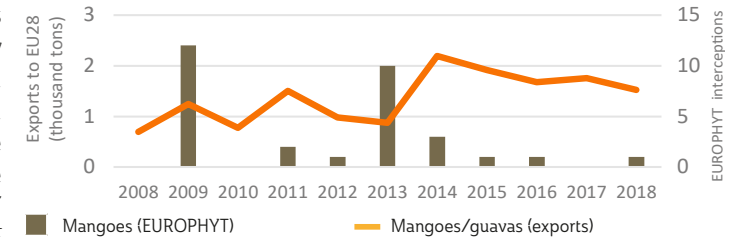
There are a few commercial horticultural enterprises, such as Radville Farms; Gambia Horticultural Enterprise; and Tropic Foods, Gambia's largest groundnut processing and exporting business, which has now moved into processing dried mango.⁹ Gambia Angola China Global Group (GACH) is building the first tomato paste factory in Gambia, and will also produce mango juice.¹⁰

Despite the presence of the Gambia River, which runs through the middle of the country, only one-sixth of the land is arable and poor soil quality has led to the predominance of one crop, groundnuts.¹¹

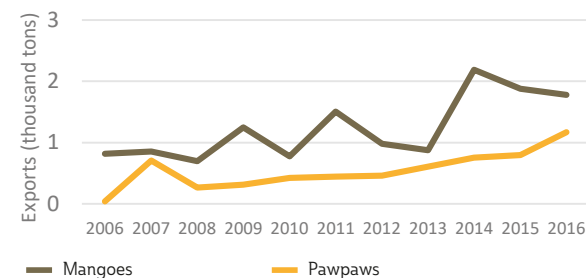
Agricultural processing industries offer significant investment opportunities. The production of tomato paste, hot pepper sauce and processing of flour from wheat could significantly reduce the Gambia's annual import requirements. These food commodities have great export potential to the West African subregion, as well as satisfying local demand caused by the growth of tourism.⁵

EU MARKET AND SPS ISSUES

Past problems with interceptions of fruitflies on mango (mainly Tephritidae and *Bactrocera* spp, and a few due to mango fruit fly, *Ceratitis cosyra*) appear to be largely under control over the past five years (see 'One to watch' below). There has been one RASFF notification, in 2015, for dichlorvos on peppers.



One to watch: mango and papaya



Gambian mango production and exports to Europe are rising, in part as a result of the World Bank's Gambia Growth and Competitiveness Project (2012–15). The project led to export of mangoes by sea for the first time, serving the EU market directly in the Netherlands, with the UK and France as other key destinations.⁶ The project also trained hundreds of farmers on best practices in production and marketing.

	National	Regional	EU	World
Potential	Tomato paste; Mango juice	Garlic; Peas; Mango fruit/juice; Tomato paste	Beans; Peppers	Brazil nuts; Beans
Developing	Tomatoes; Onions; Cabbage; Eggplant; Okra; Peppers; Lettuce; Cucurbits; Carrots; Beans; Citrus; Mangoes (fresh and dried); Cashews; Papayas; Bananas	Cashews; Other nuts	Cashews; Mangoes; Papayas	Cashews
Mature	Groundnuts; Cassava	Groundnut paste	Asian vegetables; Green beans; Mangetout peas	



Notes

- ¹ Fresh Plaza (2015) Gambia: Horticulture key area of growth. *Fresh Plaza*, 19 February. <https://www.freshplaza.com/article/2135520/gambia-horticulture-key-area-of-growth/>
- ³ Republic of The Gambia (2017) *The Gambia National Development Plan (2018–2021)*. <https://mofea.gm/ndp>
- ³ Reuters (2017) U.S. restores trade benefits to Gambia, Swaziland. Reuters Business News, 23 December. <https://www.reuters.com/article/us-usa-trade-africa-idUSKBN1EH01F>
- ⁴ AGOA.info (2019) Country Info: Gambia. African Growth and Opportunity Act. <https://agoa.info/profiles/gambia.html>
- ⁵ World Bank (2019) *The World Bank in The Gambia: Overview*. <https://www.worldbank.org/en/country/gambia/overview>
- ⁶ ITC (2015) Gambian mangoes on the European map. International Trade Centre, 21 October. <http://www.intracen.org/itc/blogs/market-insider/Gambian-mangoes-on-the-European-map/>
- ⁷ AfDB (2018) *Peri-Urban Smallholder Improvement Project*. Abidjan: African Development Bank. <https://projectsportal.afdb.org/dataportal/VProject/show/P-GM-A00-001>
- ⁸ FAO (2010) *Nutrition Country Profile: Republic of The Gambia 2010*. Rome: Food and Agriculture Organization. <http://www.fao.org/tempref/AG/agn/nutrition/ncp/gmb.pdf>
- ⁹ Kiprop, V. (2017) Riches: From Rags to Food. *The East African*, 18 November. <https://www.theeastafrican.co.ke/magazine/Mommar-Taal-profile-Gambia/434746-4193126-4rqlskz/index.html>
- ¹⁰ Commodafrica (2018) GACH lance son usine de tomate et d'eau minérale en Gambie. *Commodafrica*, 21 August. <http://www.commodafrica.com/21-08-2018-gach-lance-son-usine-de-tomate-et-deau-minerale-en-gambie>
- ¹¹ BBC (2018) The Gambia country profile. *BBC News*, 14 February. <https://www.bbc.co.uk/news/world-africa-13376517>

Local research: ClassM

Sources

World Bank income classification: <https://datahelpdesk.worldbank.org/knowledgebase/articles/906519>

GDP (gross domestic product): <https://data.worldbank.org/country/>

BBC News – Country Profiles: <https://www.bbc.co.uk/news/world-africa-16833769>

World Bank Country Overviews: www.worldbank.org/en/where-we-work

CIA World Factbook: <https://www.cia.gov/the-world-factbook/>

Human Development Index 2018 – a composite index of life expectancy, education and per capita income indicators: http://hdr.undp.org/sites/default/files/2018_human_development_statistical_update.pdf

AFF as percentage of GDP (AFF = Gross Output Agriculture, Forestry and Fishing): <https://data.worldbank.org/indicator/nv.agr.totl.zs>

Population: <https://data.worldbank.org/country/>

Population employed in agriculture: <https://data.worldbank.org/indicator/sp.rur.totl.zs>

Food production: www.fao.org/faostat/

Trends in fruit and vegetable production: www.fao.org/faostat/

Cropland and arable land left: World Bank

Total exports (quantity and value): IFPRI

Global imports and exports, top 10 fresh fruit and vegetables, and top 10 processed fruit and vegetables: IFPRI

Regional imports and exports, top 10 fresh fruit and vegetables, and top 10 processed fruit and vegetables: IFPRI

Exports to EU28, top 10 fresh fruit and vegetables, and top 10 processed fruit and vegetables: <https://ec.europa.eu/eurostat>

Focus on the EU market: https://ec.europa.eu/food/plant/plant_health_biosecurity/europhyt_en