

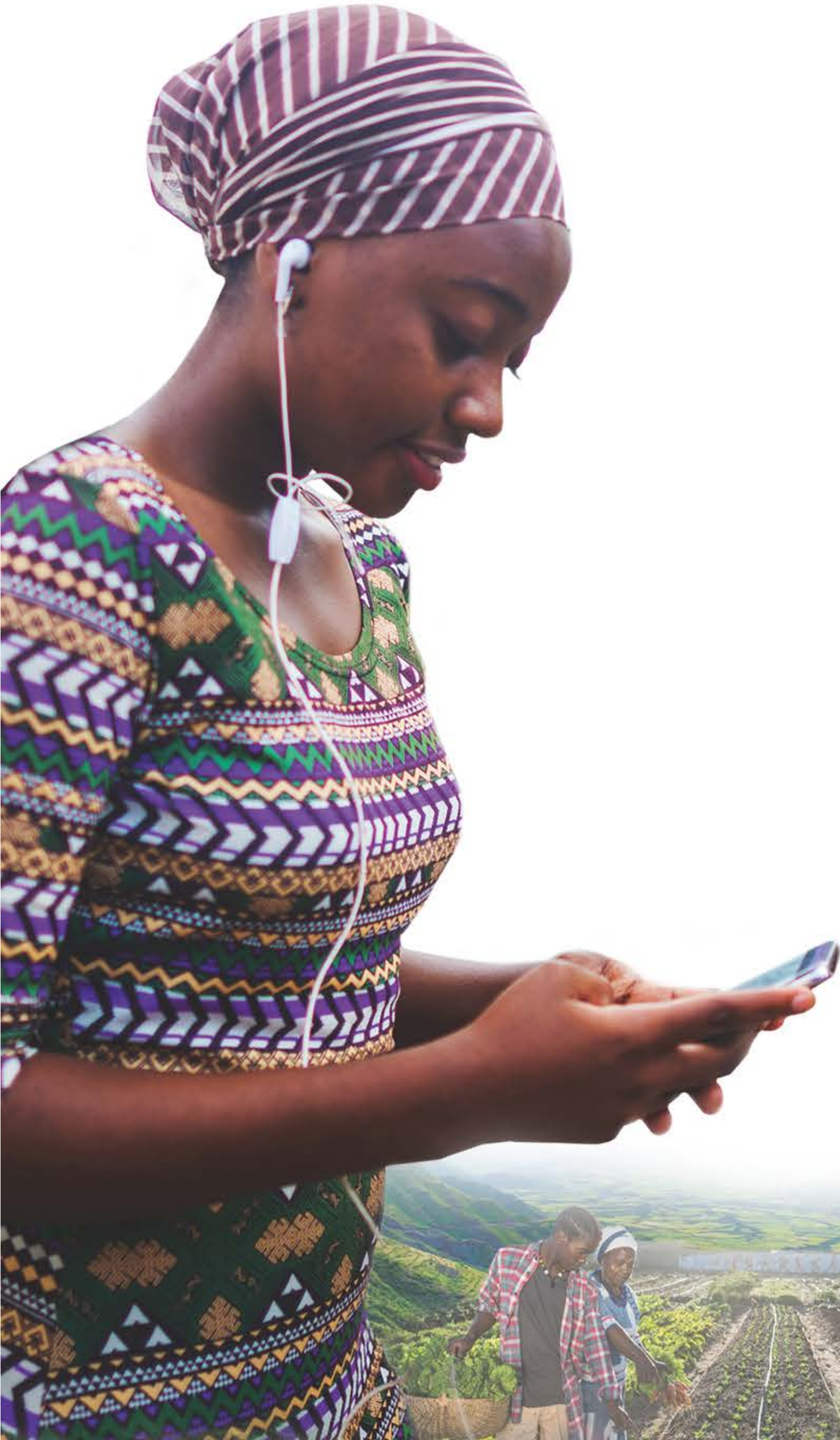


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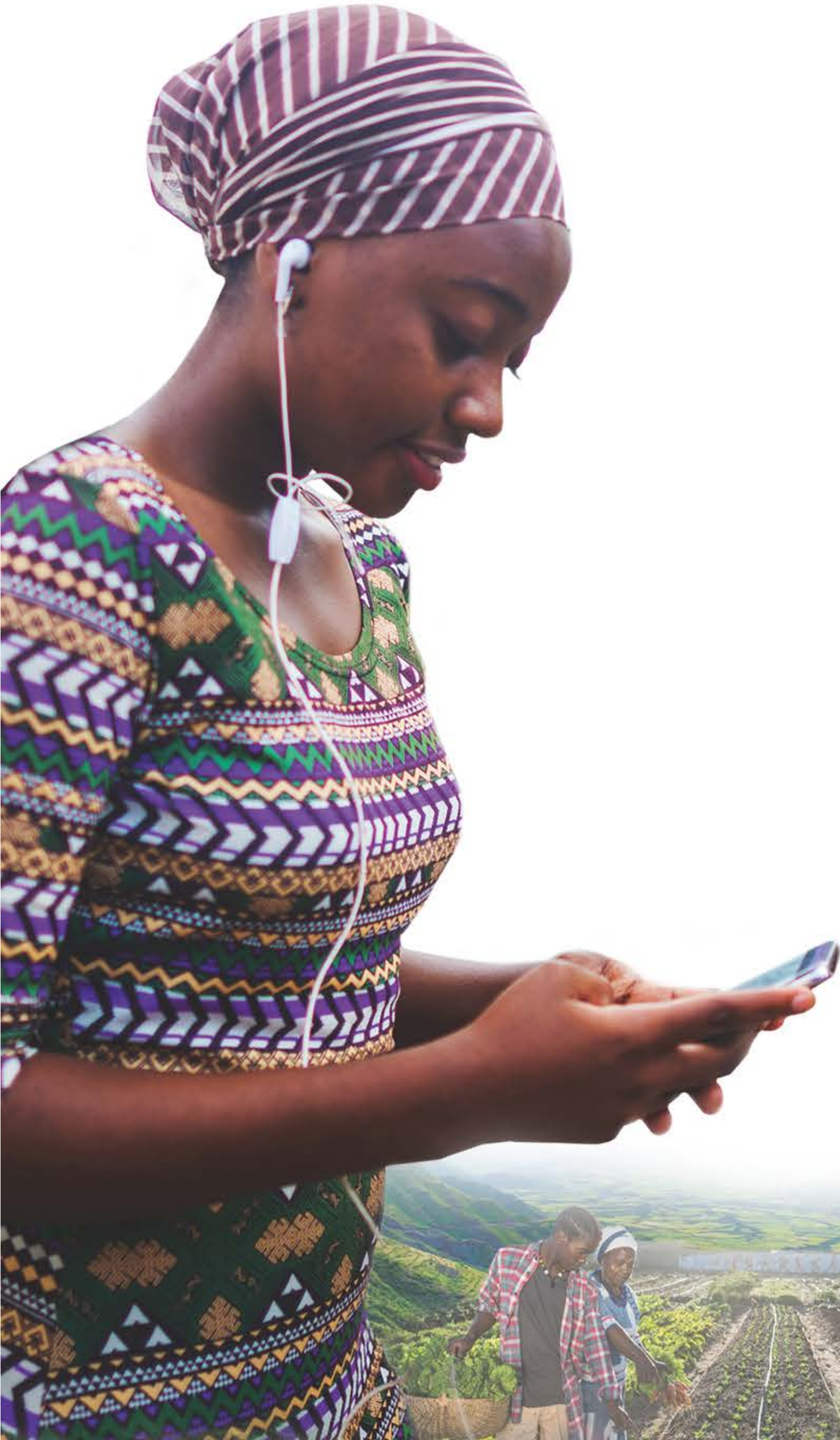


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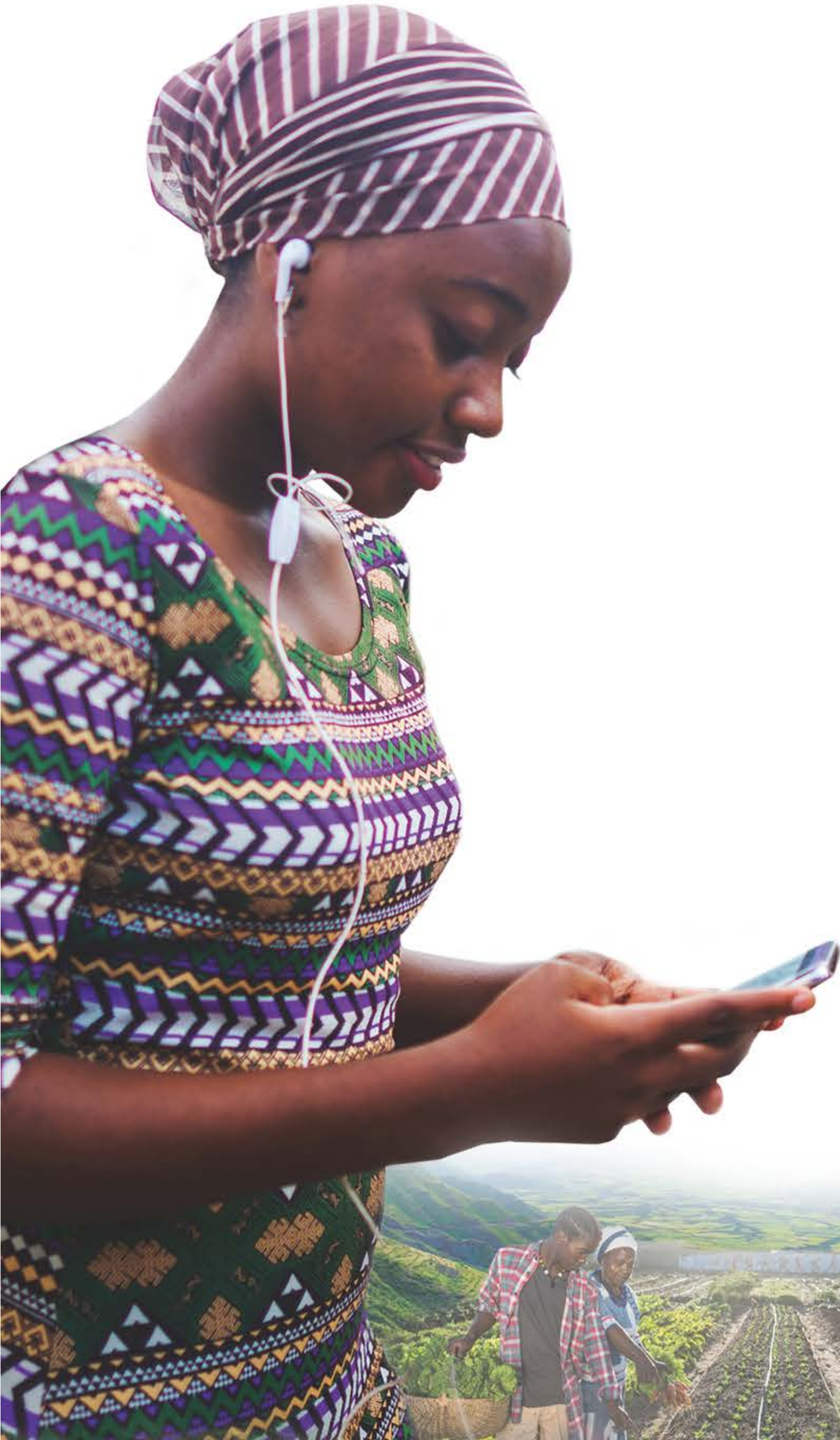


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#AUEU4farmers



USE OF DIGITAL SOLUTIONS IN AGRICULTURE



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Technical Centre for Agricultural and Rural Co-operation (CTA)

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Minister for Agriculture, Fisheries and food,
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ENGEL FRIEDERIKE HESSEL

Head of Digital Innovation Division, German
Federal Ministry of Food & Agriculture & Director
of the Thünen Institute of Agricultural Technology

BERNARD YVETOT

Vice-President international strategy,
Orange Group Strategy division

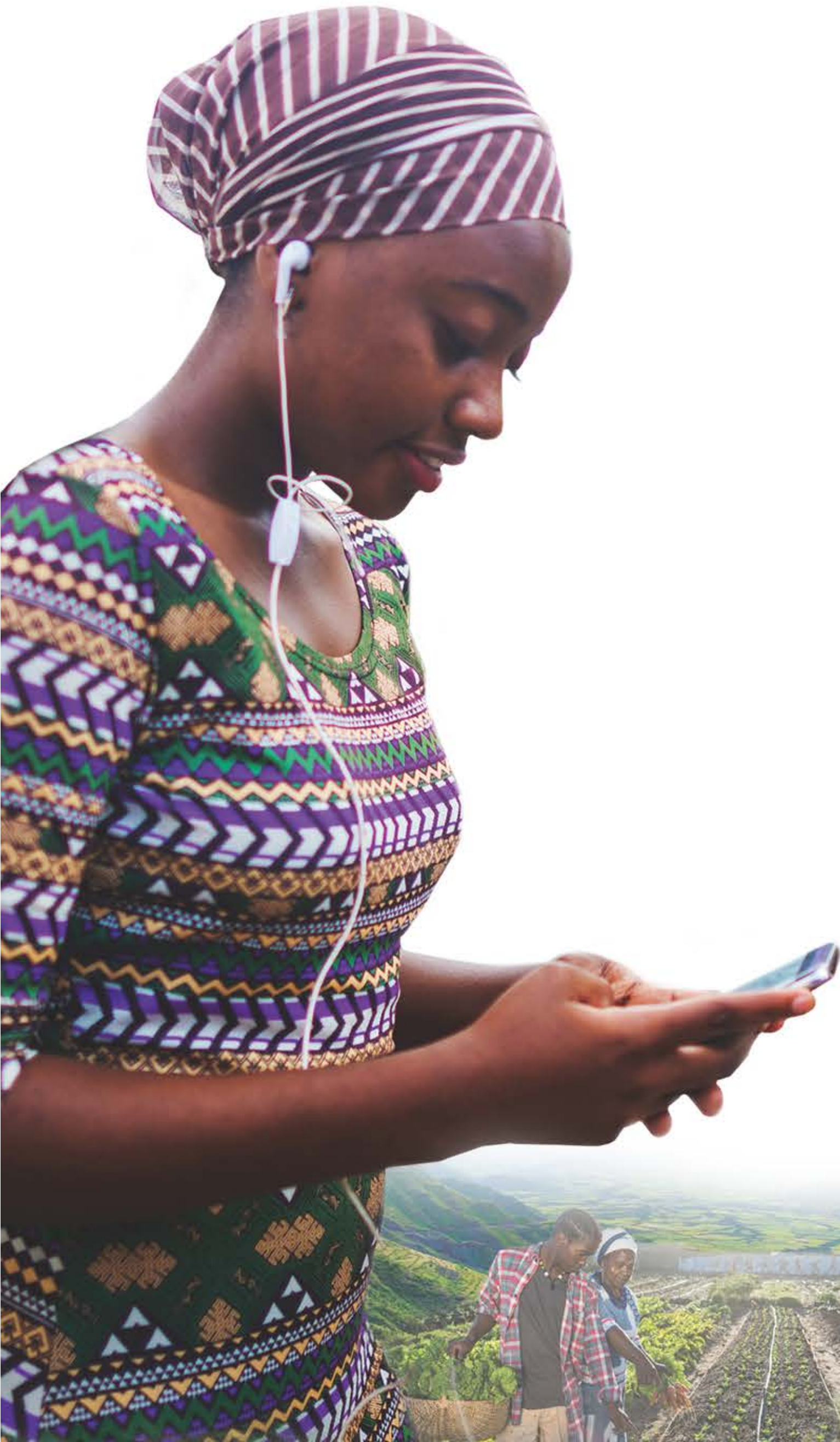
STEWART COLLINS

Senior Programme Officer for Digital Solutions,
Bill & Melina Gates Foundation

BERNARD FOFFE

CEO, Jangolo, Cameroon





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Use of **digital solutions** in **agriculture**





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Technical Centre for Agricultural and Rural Co-
operation (CTA)

Moderator



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Minister for Agriculture, Fisheries and food, Spain



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Director Technical Centre for Agricultural and Rural Co-operation CTA



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THE DIGITALISATION OF AFRICAN AGRICULTURE REPORT

2018-2019

AU/EU Agriculture Ministerial Conference
Rome, June 21, 2019



Dalberg Advisors





Methodology: How did we do it?

Methodology

Source	Update
Survey	Surveyed >430 players with 175 responses
Interviews	More than 120 interviews of agribusiness leaders, tech experts, D4Ag solution providers, academics and policymakers.
Country field visits	Deep dive field visits and country case studies in Rwanda, Ethiopia, Nigeria, Senegal and Ghana ; lighter touch reviews in Kenya and the Sahel region
Desk research	Detailed review of D4Ag literature on market assessments, business models, end-user needs and feedback, and impact evidence
Advisory council	25 leading experts and practitioners in the D4Ag Sector

Advisory council





Framing the opportunity: The big picture

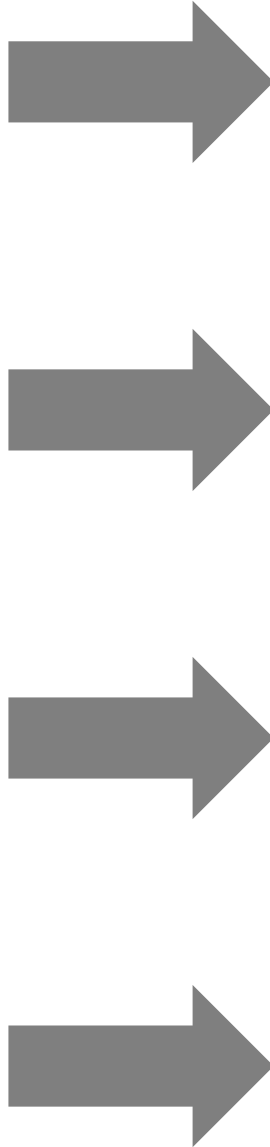
Links to inclusive growth, sustainable food security agendas

D4Ag Infrastructure

- Ag Data**
(e.g., farmer registries, farmer transactions, soil maps, weather, agronomy, pest & disease surveillance)
- D4Ag Hardware**
(e.g., drone, satellite/GIS, field sensors, machinery sensors, portable soil/crop/input diagnostics)
- D4Ag Software**
(e.g., CRM, ERP, data capture tools, field agent management tools, data analytics tools, blockchain platforms)

D4Ag use cases

-  **Advisory & information services**
-  **Market linkages**
-  **Financial access**
-  **Supply chain management**
-  **Macro agri-intelligence**



SHF-level impacts

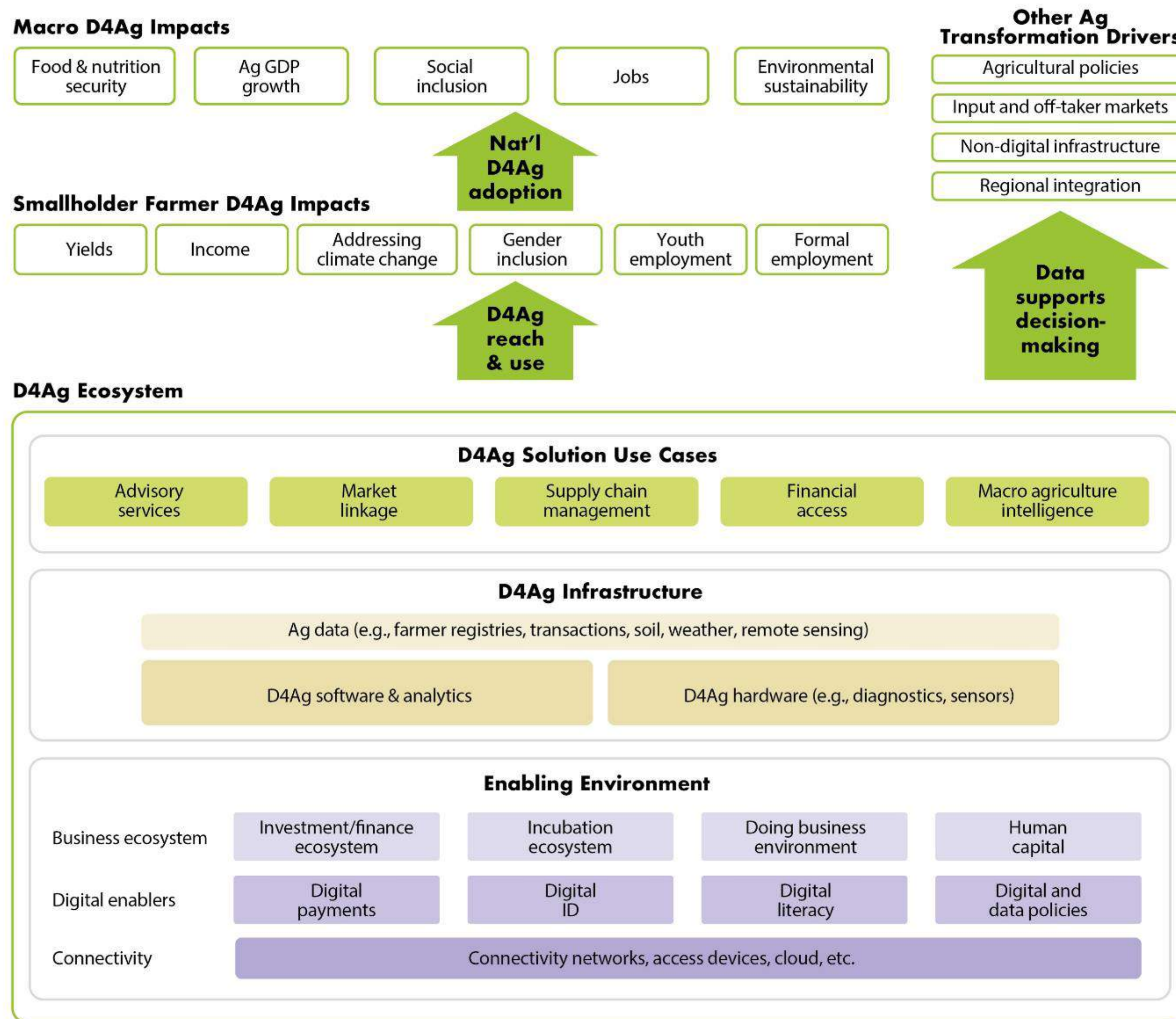
- Higher yields
- Climate change resilience
- Higher incomes
- Inclusion of women
- Youth employment

Macro-level impacts

- Agricultural transformation
- Sustainable food and nutrition security
- Inclusive growth



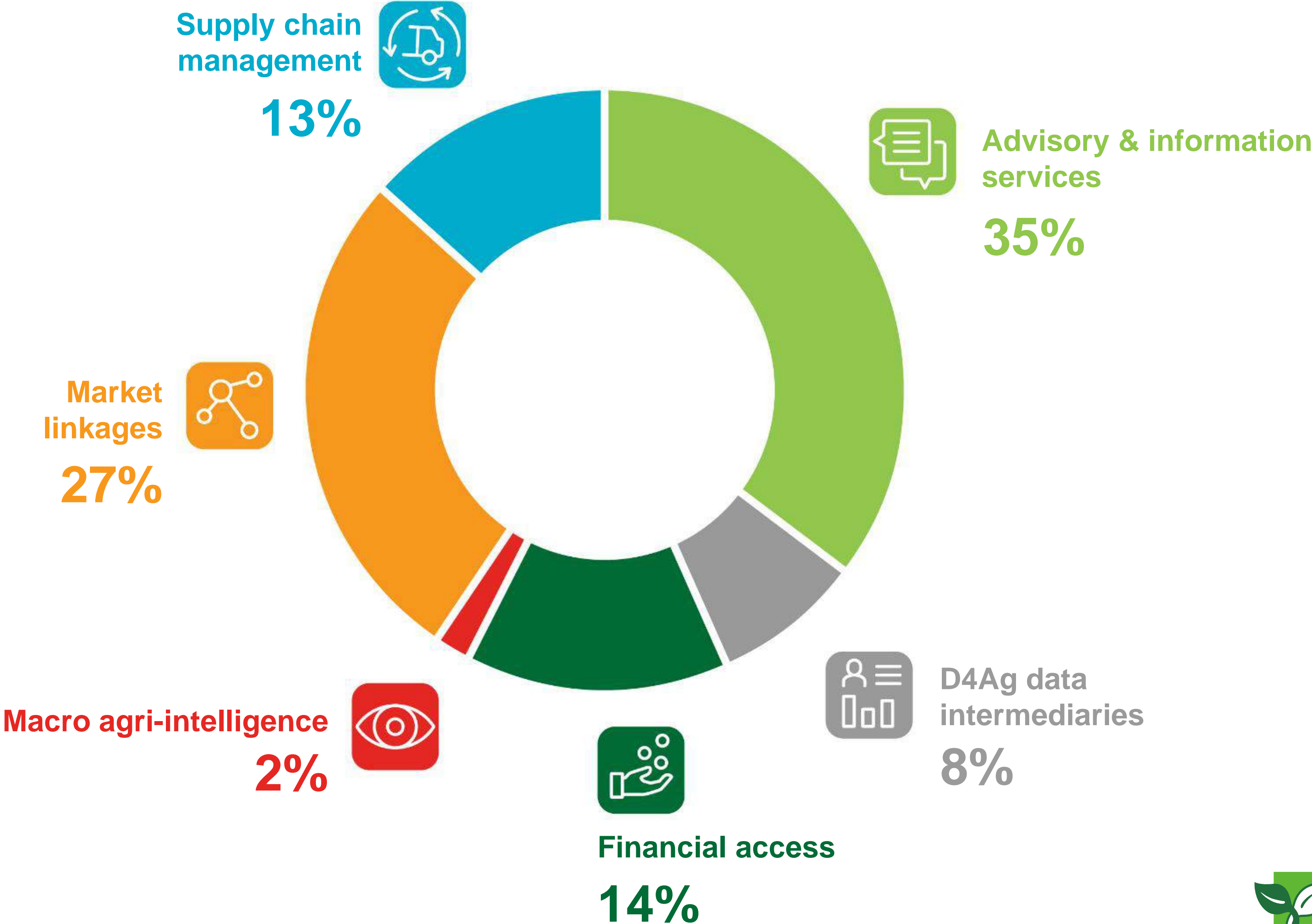
The D4Ag ecosystem



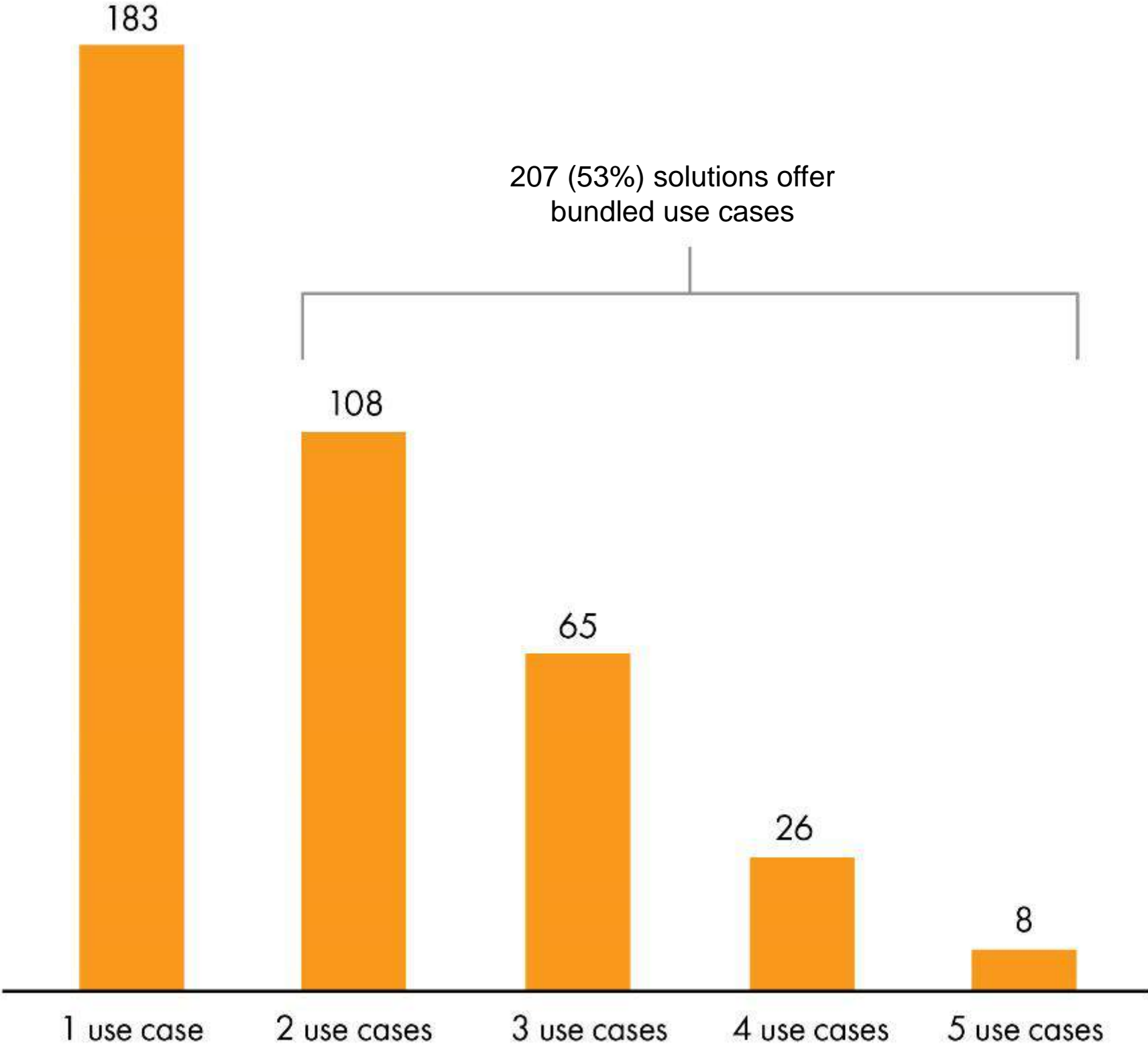


The report: Current status of D4Ag in Africa

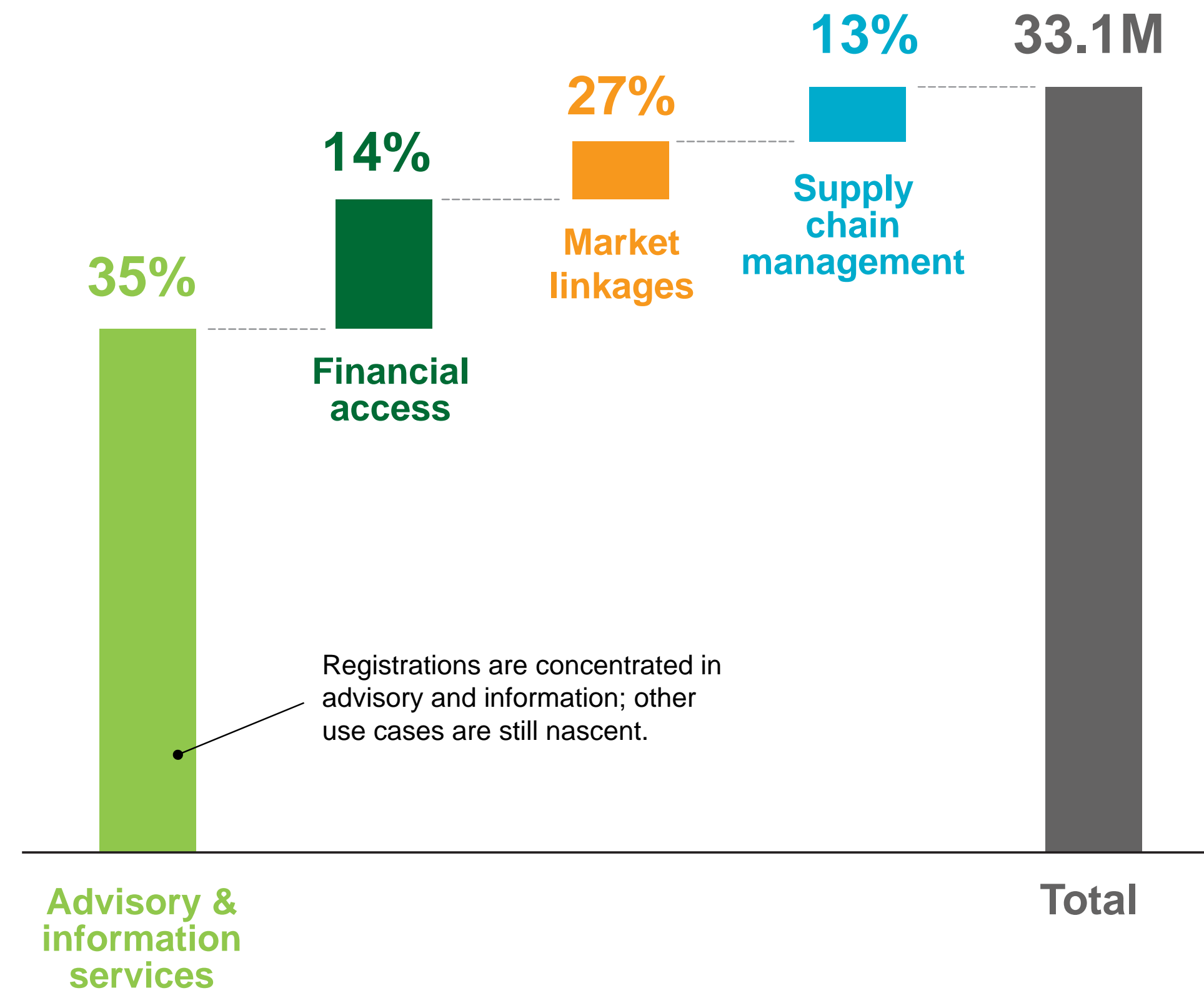
D4Ag solutions by use case



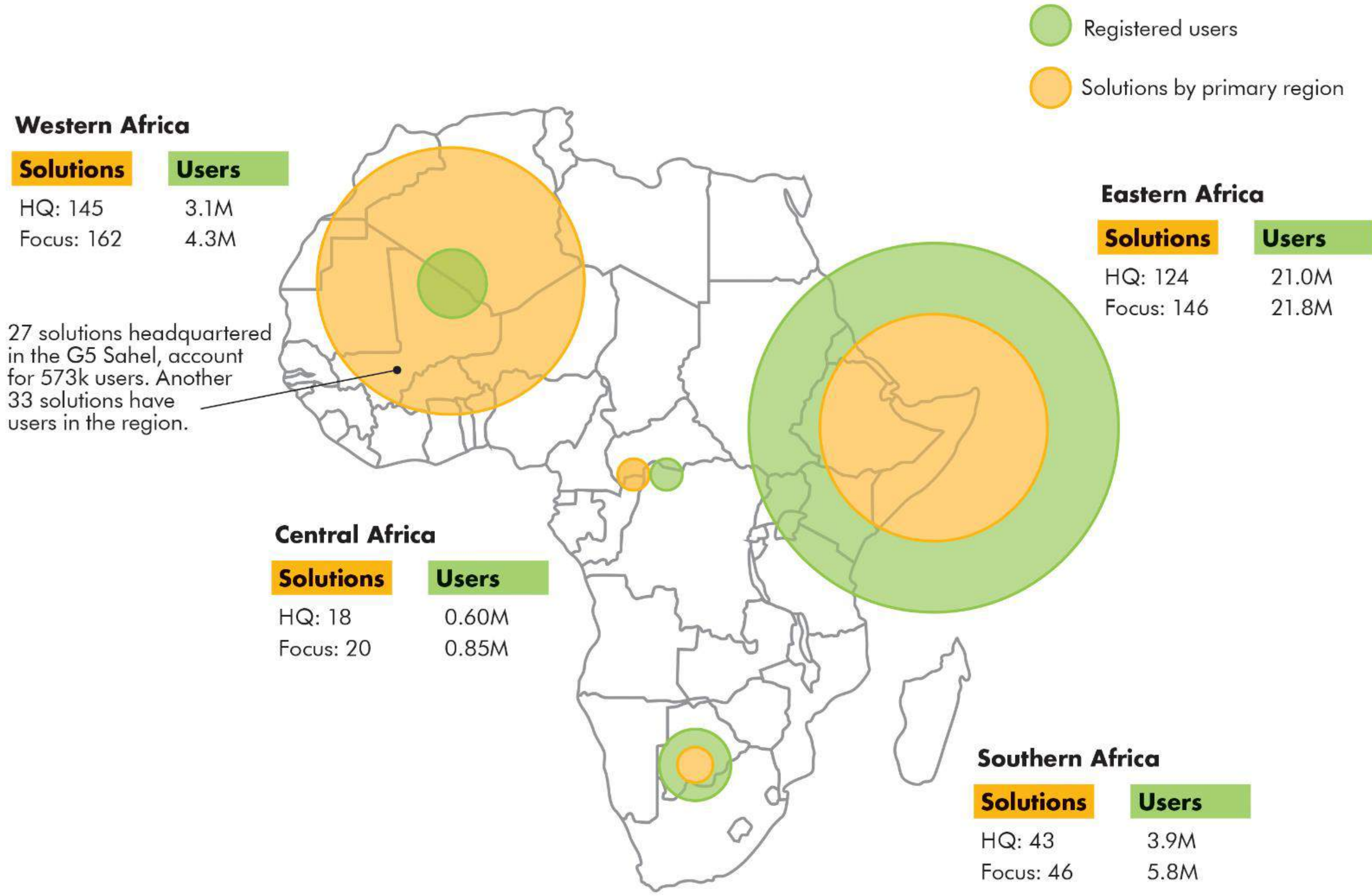
Solutions by number of use cases offered



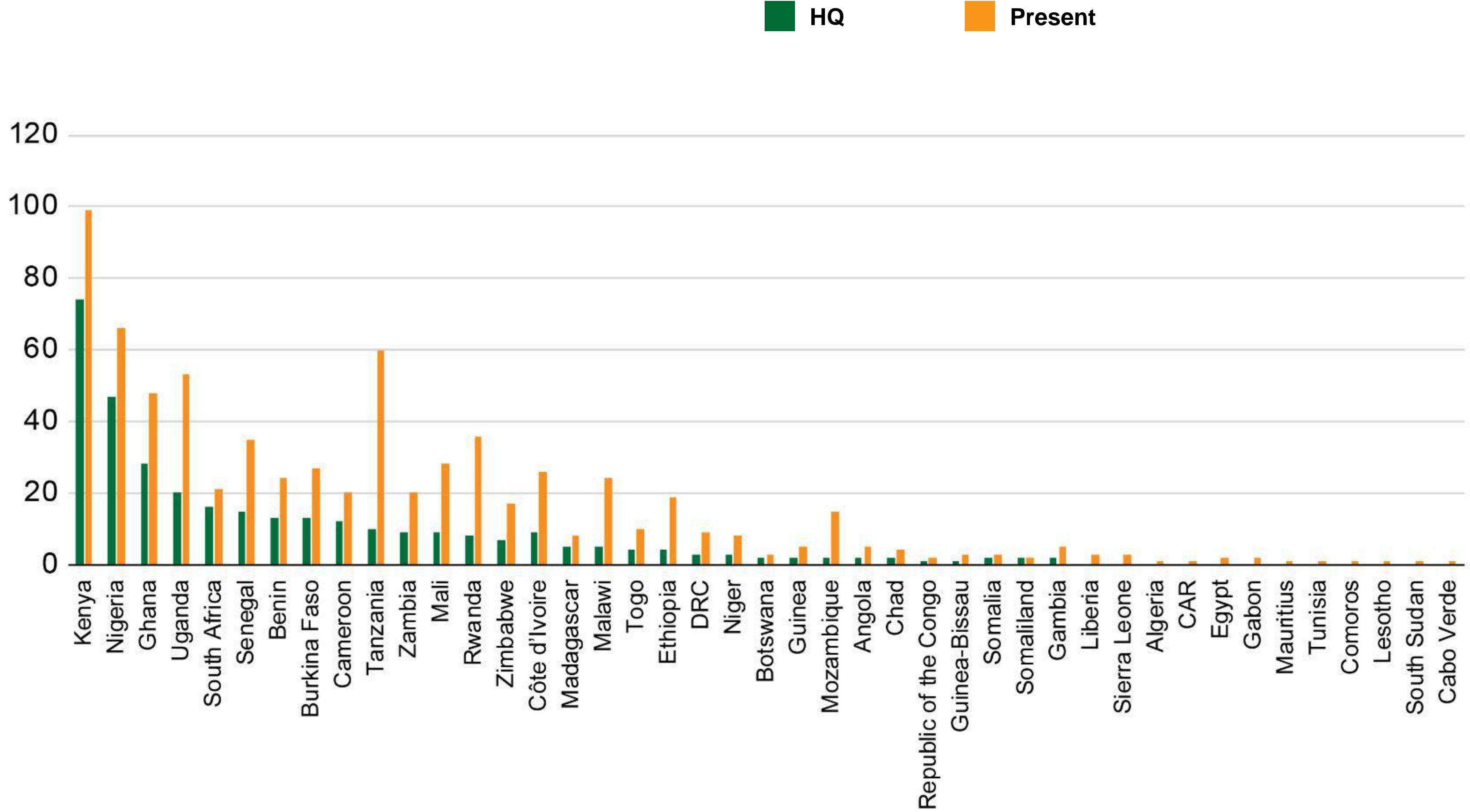
Smallholder registrations by use case



Regional distribution of users and solutions

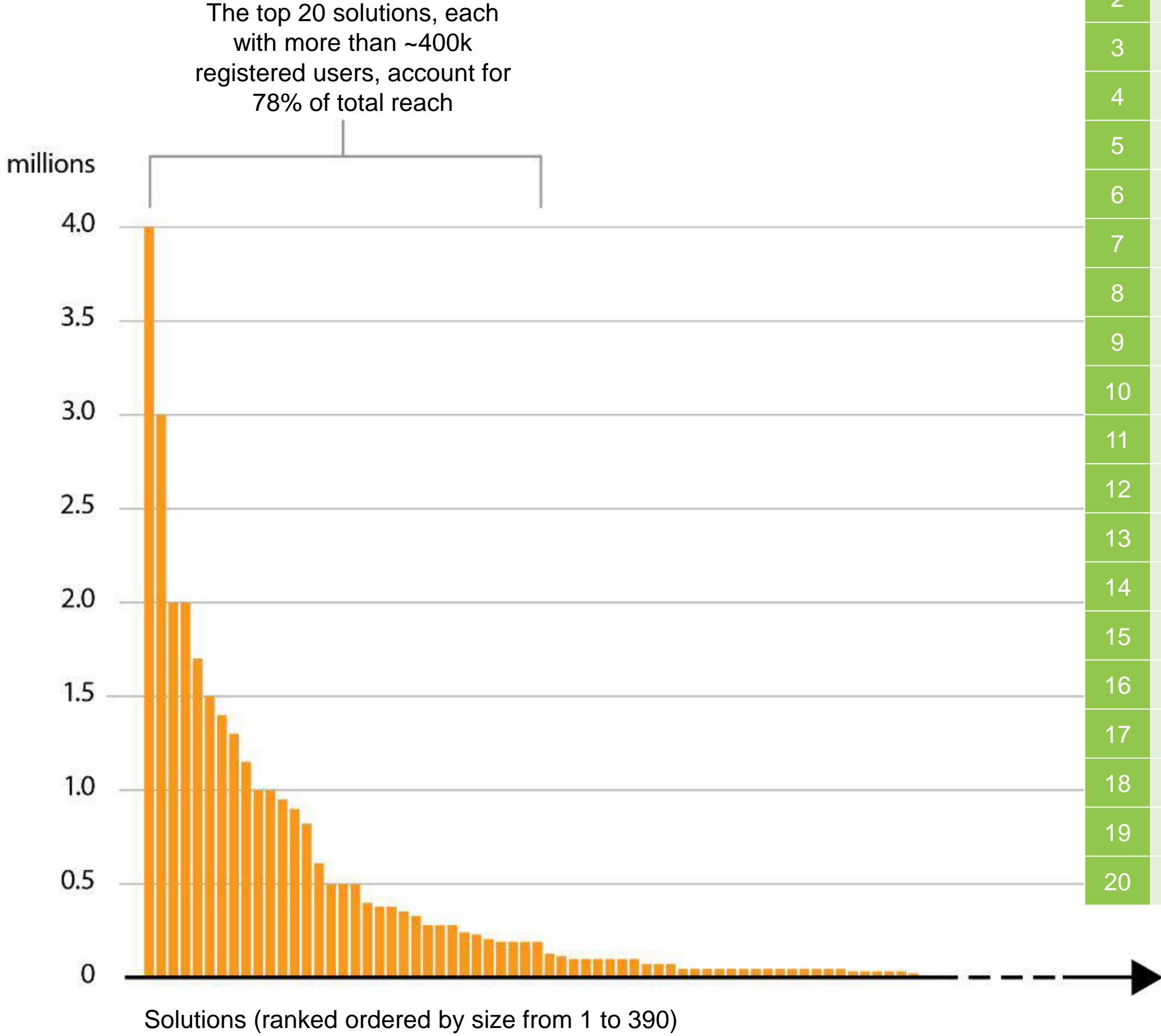


Distribution by country



D4Ag solutions by number of registered farmers

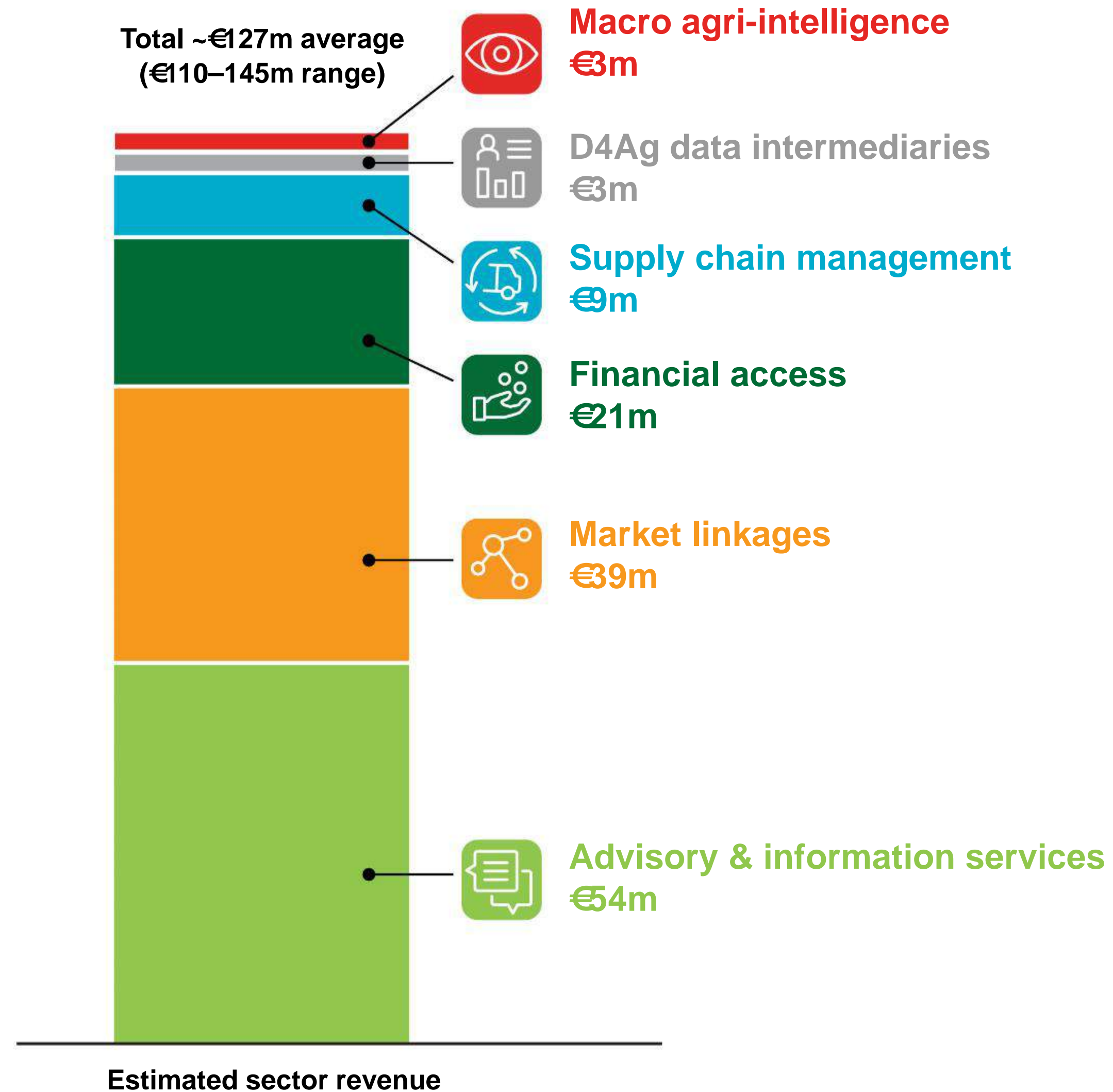
Top 20 solutions, by number of registered users



	Solutions	Registered	Use case
1	Ethiopia 80-28 hotline	4m	Advisory services
2	MNO intermediary (multi-country)	3m	Advisory services
3	Agribus. digital platform	2m	Advisory services
4	Farmer connectivity platform	2m	Advisory services
5	ACRE Africa	1.7m	Financial inclusion
6	Bank of Kigali / TechHouse	1.5m	Financial inclusion
7	WeFarm	1.4m	Advisory services
8	MNO (multi-country)	1.3m	Advisory services
9	ZIAMIS	1.1m	Advisory services
10	Esoko Digital Farmer Service	1m	Advisory services
11	Econet EcoFarmer	1m	Advisory services
12	Safaricom DigiFarm	950k	Market linkage
13	Arifu	900k*	Advisory services
14	iCow	822k	Advisory services
15	Pula	611k	Financial inclusion
16	Digital Green	500k	Advisory services
17	Agroforce / Virtual City	500k	Supply Chain Mgmt
18	Waterwatch Cooperative	500k	Advisory services
19	RATIN	400k	Advisory services
20	Mobigrow/KCB	380k	Market Linkage

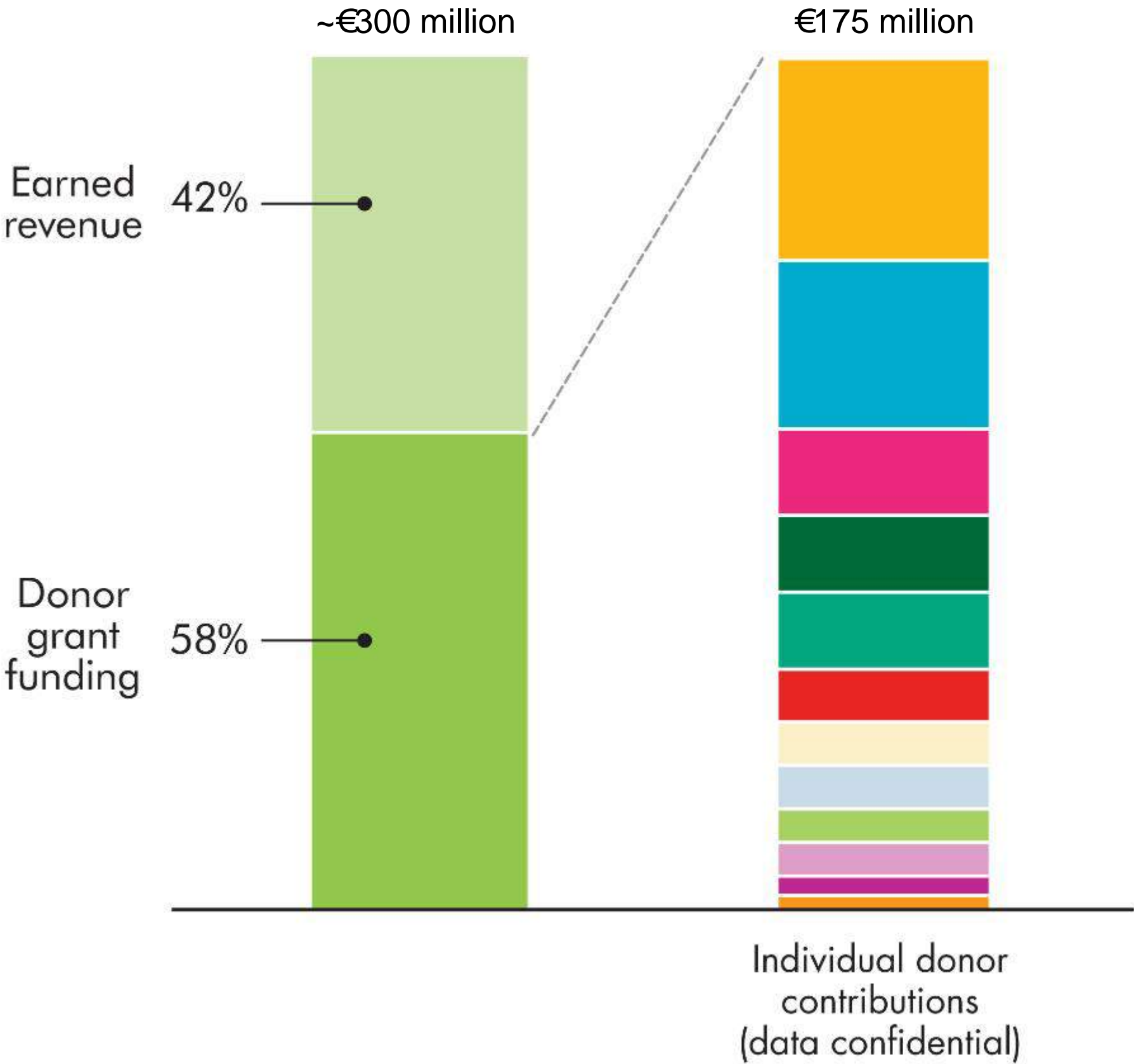


Annual D4Ag sector revenues



Grant funding

Estimated annual Sub-Saharan Africa D4Ag funding, 2018
 € millions, Sub-Saharan Africa, 2018

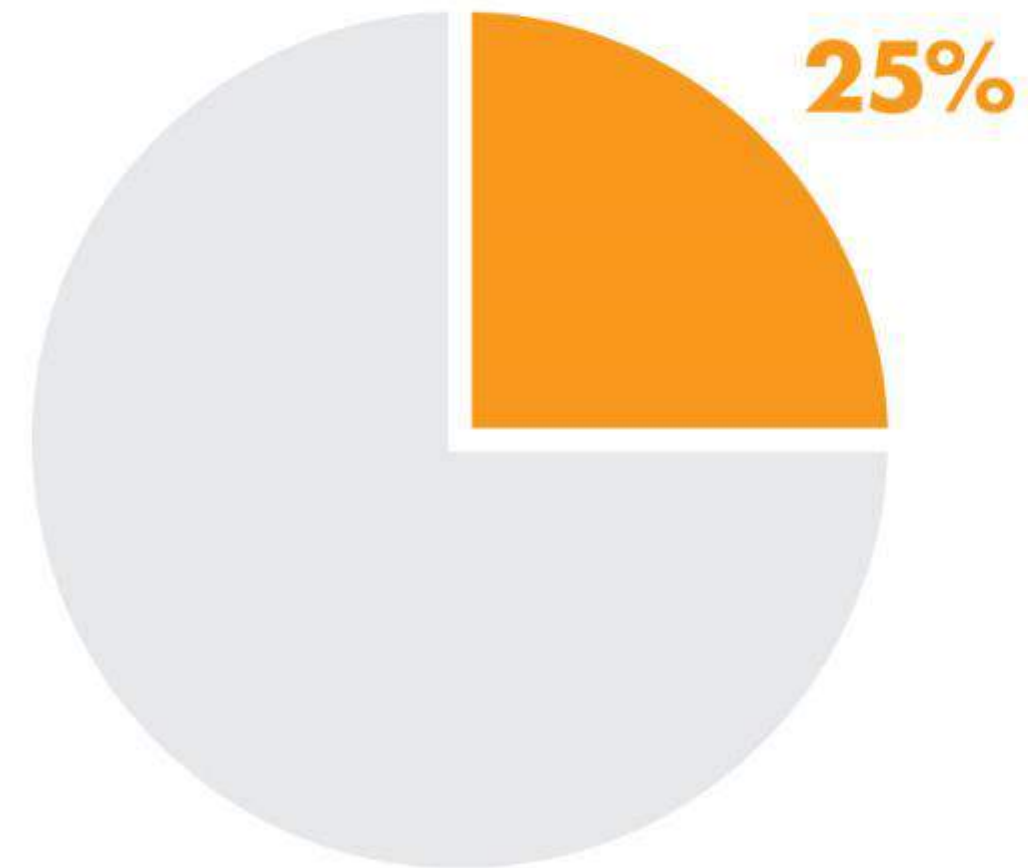


Top global D4Ag funders

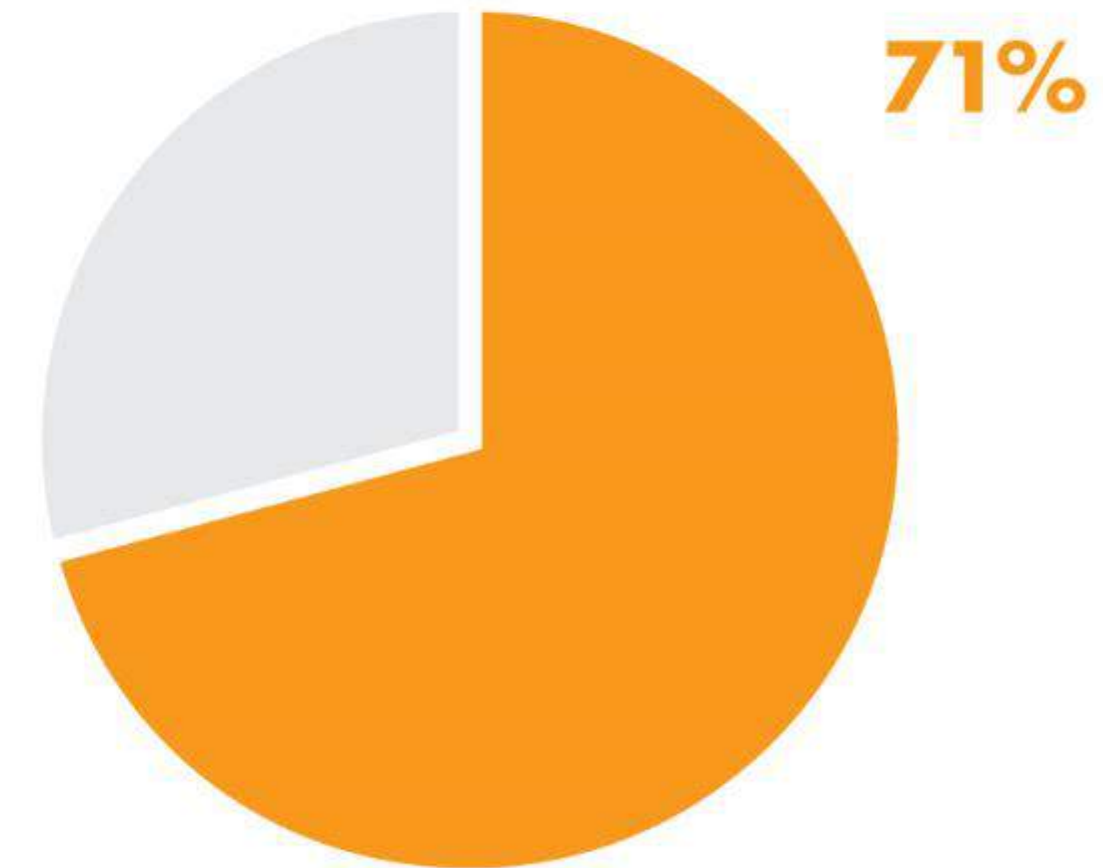


Share of users that are women and youth

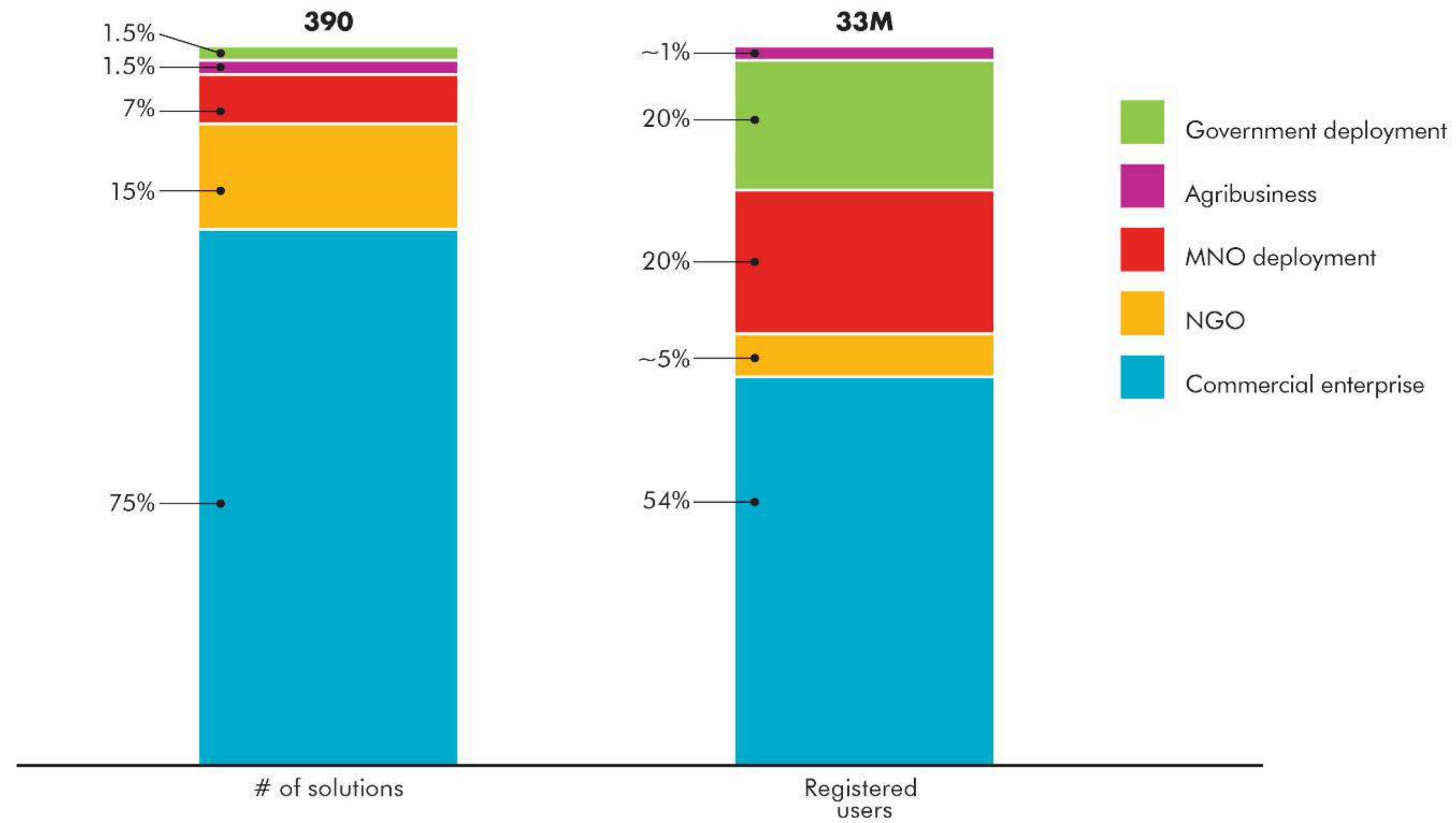
Women



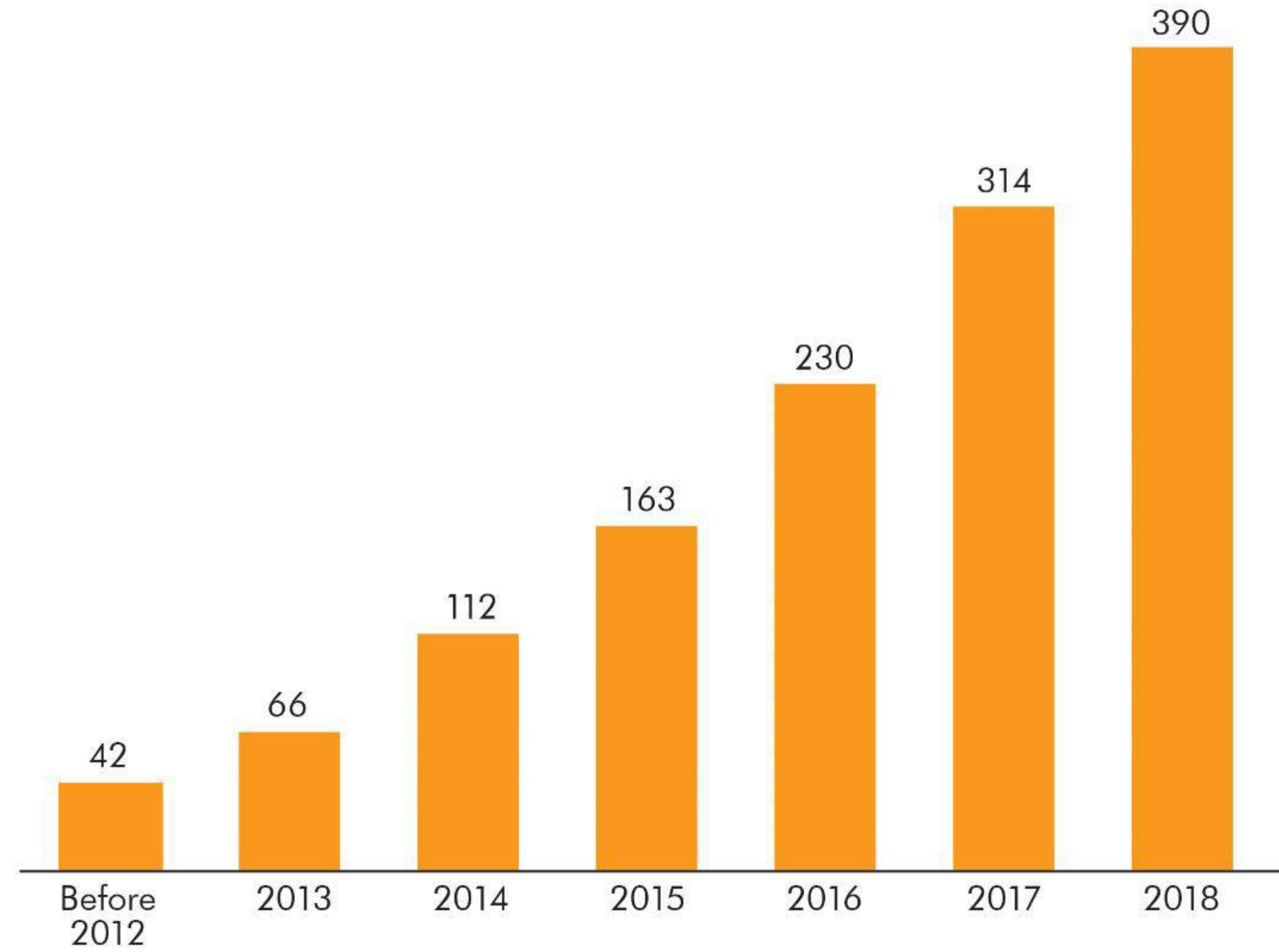
Youth
(under 35)*



Smallholders registered by solution type

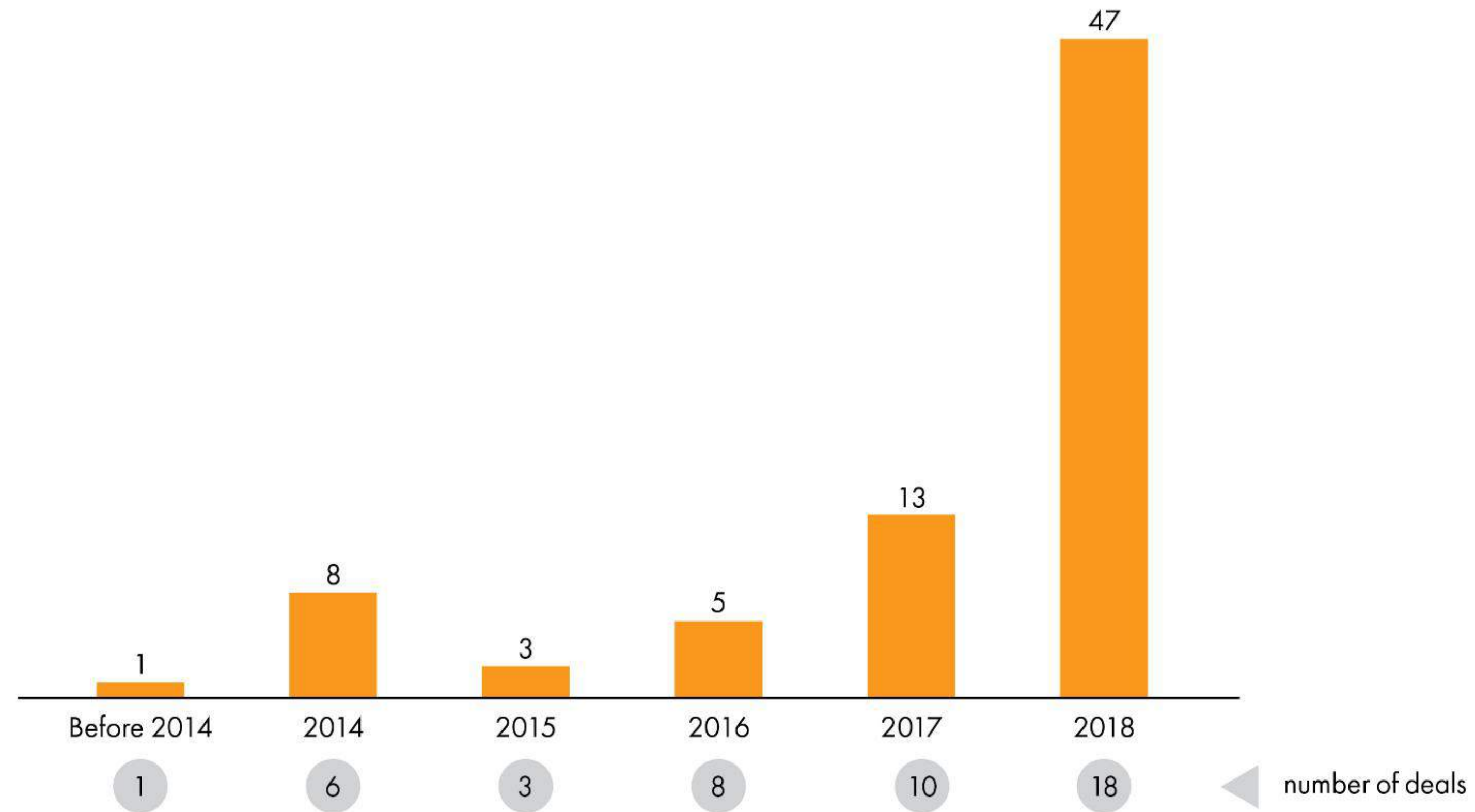


Number of solutions by year



Value and volume of investments

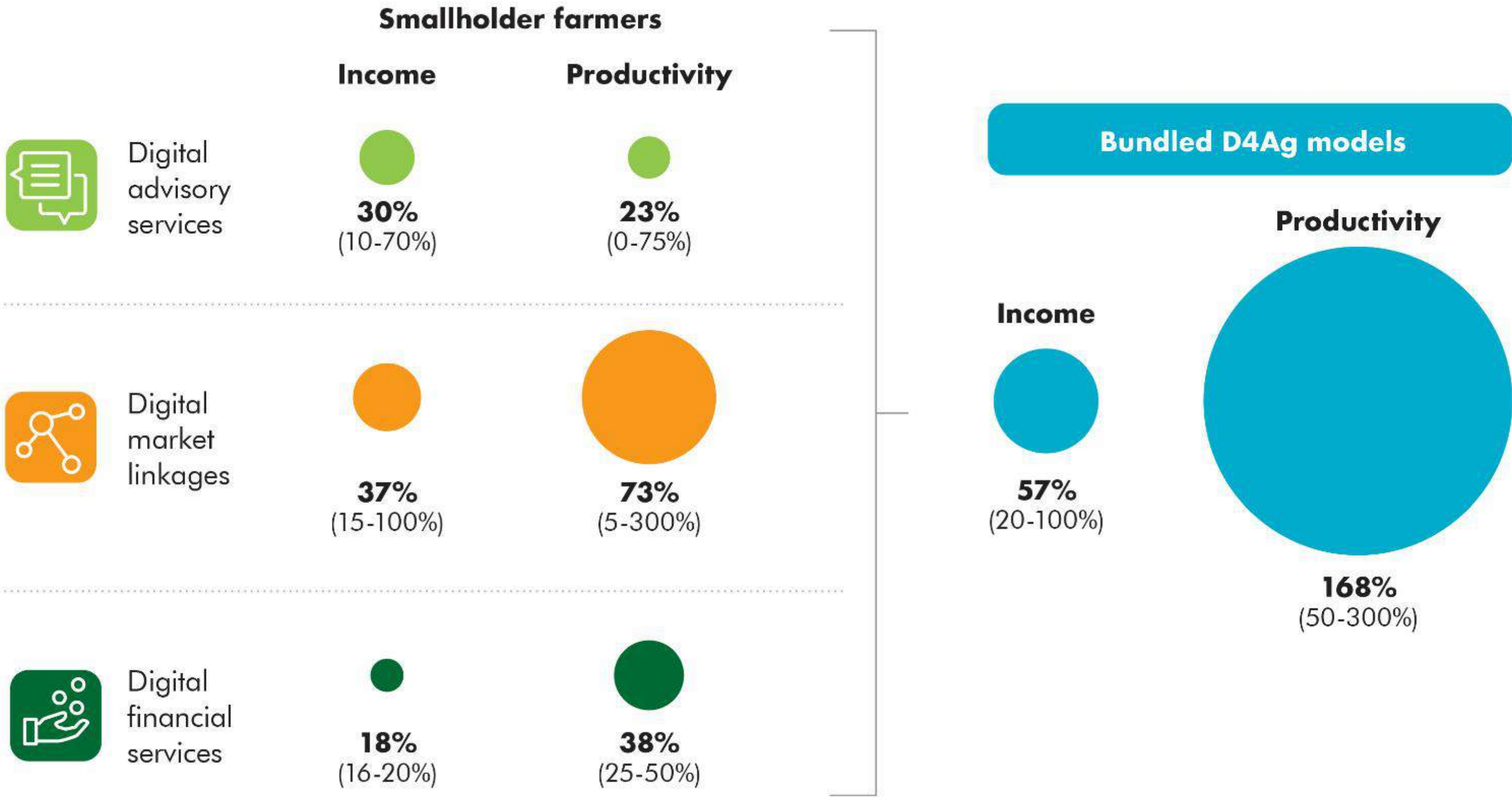
€ millions and number of transactions





D4Ag's ability to affect impact

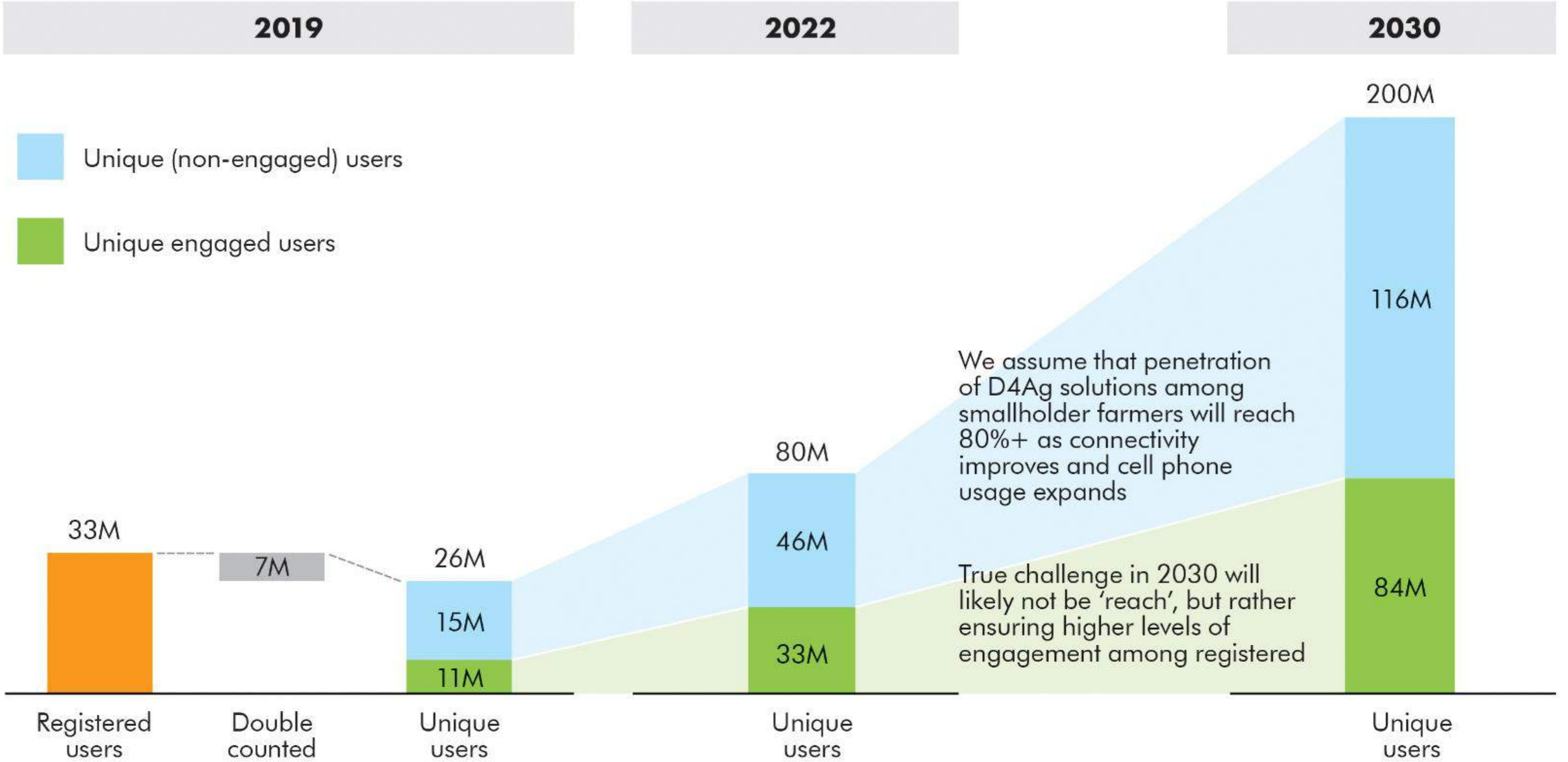
Impact data suggests power of bundling





Where are we headed?

Projected unique and active users



We assume that penetration of D4Ag solutions among smallholder farmers will reach 80%+ as connectivity improves and cell phone usage expands

True challenge in 2030 will likely not be 'reach', but rather ensuring higher levels of engagement among registered

- 1 20% haircut to de-duplicate the reach figure
- 2 42% engaged user rate from survey data
- 3 44% historical growth rate from survey data
- 4 Projected number of smallholder farmers based on UN and Dalberg analysis





Recommendations

D4Ag Recommendations



Develop human capital at all levels of D4Ag ecosystem

Drive greater business model sustainability

Create greater impact by bringing D4Ag to less-served populations

Invest in the missing middle infrastructure

Invest in good data stewardship and design for risks

Invest in the D4Ag research agenda

An alliance of key stakeholders



Attract investment



Facilitate deeper relationships and collaboration



Link agricultural technology innovation to big technology players



Build knowledge and produce periodic reports



Develop capacity



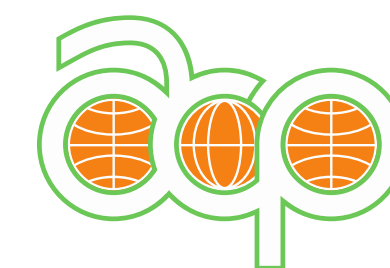
Develop indicators for monitoring/ tracking progress



Download the report from cta.int/d4ag-report

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Cabinet Secretary, Ministry of ICTs, Kenya



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Vice-President international strategy,
Orange Group Strategy division



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Senior Programme Officer for Digital Solutions, Bill & Melina Gates Foundation



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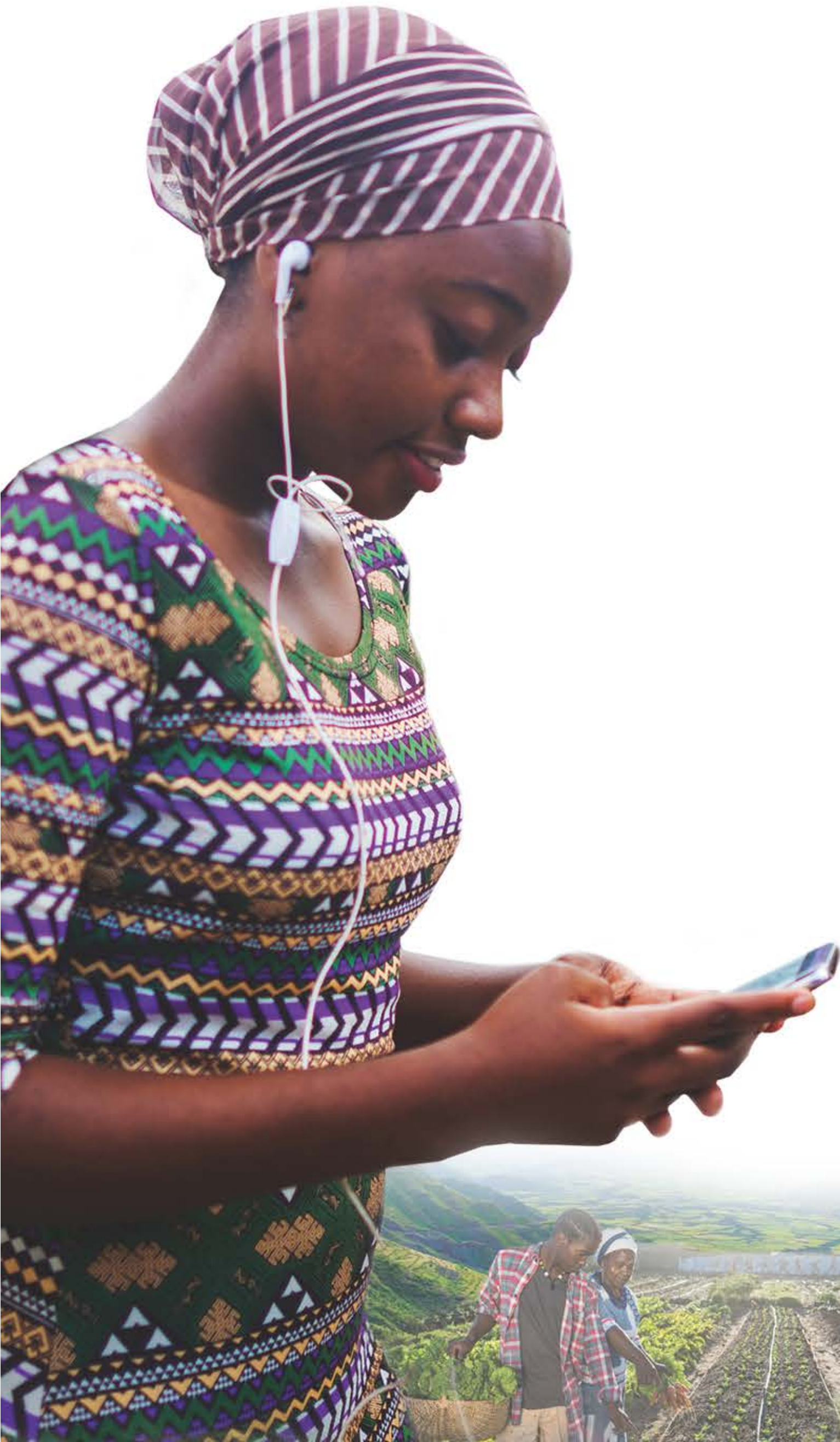


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L'utilisation de **solutions** **digitales** en **agriculture**





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