MINISTÈRE DE L'ÉCONOMIE, DES FINANCES ET DE LA SOUVERAINETÉ INDUSTRIELLE, ÉNERGÉTIQUE ET NUMÉRIQUE
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Export crops in East Africa: an evolving economic and social pillar

Export crops in East Africa occupy a central place in the region's economies, where they serve as a growth engine, a major source of foreign currency, and a cornerstone of rural employment. For decades they have shaped the productive and commercial structure of the region, bringing together millions of small-scale producers in value chains often inherited from the colonial era but profoundly transformed by liberalization, diversification and upgrading. From Ethiopian coffee to Kenyan tea, from Madagascan vanilla to Tanzanian cotton, these iconic products contribute to the economic and social identity of the region's countries. By contributing both to macro-economic stability and to social cohesion, they represent an essential lever of competitiveness and regional integration.

An essential driver of growth, employment and stability

Export crops can account for up to 80 % of total export receipts in some countries, while engaging the majority of the rural workforce. Kenya exemplifies regional success: tea, coffee and horticulture contribute nearly 40 % of national exports and support around fifteen million people. In Rwanda and Burundi, coffee and tea remain the main export products, providing income for nearly one-fifth of the Rwandan population and more than half of Burundian households. Tanzania has diversified production across coffee, cotton, tobacco, cashew nuts, sugar and horticulture. Uganda still depends heavily on export crops, which provide about 40 % of non-gold external earnings and employ nearly 70 % of the active population. In Ethiopia, coffee, cut flowers, oilseeds and pulses represent over 80 % of agricultural export earnings. In the Indian Ocean islands, the Comoros, Madagascar and Mauritius rely on emblematic productions such as vanilla, cloves, cocoa, sugarcane or essential oils, which form the backbone of rural economies and exports. Finally, in Somalia and Sudan, export crops – sesame, groundnuts, cotton, dried lemons – remain modest but play a vital role in rural incomes and resilience.

Structurally organised value chains facing common constraints

Governance of these value chains rests on a combination of public institutions, cooperatives and private actors responsible for regulation, certification and marketing. In Kenya, the Kenya Tea Development Agency and the Tea Board of Kenya regulate and support the tea sector, while in Rwanda and Burundi the NAEB, ODECA and

OTB oversee quality and production of coffee and tea. In Uganda, the Ministry of Agriculture, Livestock and Fisheries spearheads the diversification of external trade long centered on the "three C's" (coffee, cotton, copper) and the "three T's" (tea, tourism, tobacco). In Ethiopia, the Ethiopian Coffee and Tea Authority governs a sector crucial for external earnings, while in the Comoros the Office Comorien des Produits de Rente, created in 2022, aims to better structure vanilla, clove and ylang-ylang value chains. In Madagascar, coordination between the State and exporters is strengthening around issues of traceability and compliance with international standards. These arrangements have enabled significant quality gains, but the chains remain weakened by deficits in agri-logistics infrastructure, limited access to finance and low value-addition, with the majority of products exported in raw form.

Major socio-economic impact

Export crops constitute the main source of income for millions of rural households. In Rwanda, coffee and tea create livelihoods for more than 2.5 million people; in Uganda, export crops provide income to over five million households and generate nearly half of agricultural foreign currency; in Tanzania, they are the third largest source of foreign currency and employ hundreds of thousands of small producers. In Burundi, more than half of rural households depend on these value chains, while in Madagascar vanilla and cloves provide nearly 400 000 direct jobs, and in the Comoros the three traditional export products — vanilla, ylang-ylang and cloves — account for around 74 % of national exports. In Somalia and Sudan, these productions, though modest, play a key role in food security and community cohesion. These value chains also contribute to economic inclusion of women and youth, strengthening their role in local development dynamics.

Persistent challenges: competitiveness, sustainability and value-addition

Despite their vitality, these value chains face common structural constraints: volatility of world commodity prices, dependence on a limited number of export markets, weak agri-logistics and energy infrastructure, and low local processing. Increasing market demands from Europe and Asia for quality, traceability and sustainability place growing pressure on small producers, often poorly equipped to comply. Climate change – droughts, floods, soil degradation – heightens production risks and threatens income stability. Institutional and social constraints (low remunerations, limited access to credit and inputs, fragmented governance) also hamper upgrading and regional competitiveness. Somalia illustrates in this regard the difficulties of a country with strong agricultural potential, but still hindered by traditional production methods, poor access to finance and inadequate infrastructure.

Public and private strategies in transformation

In response to these challenges, states and private sector actors have launched deep reforms to strengthen resilience and competitiveness of export chains. National agricultural policies aim to diversify products and markets, encourage local processing and promote sustainable practices. Significant investments in rural infrastructure, logistics chains and processing capacities are underway. Climate-smart agriculture, digital traceability and international certifications are becoming levers of competitiveness, while public-private partnerships help professionalise cooperatives and improve sector governance. These initiatives reflect a shared aim to turn export crops not only into foreign-exchange earners, but into genuine levers of structural transformation and agricultural industrialisation.

A strategic regional issue

Export crops remain in the region a pillar of growth, stability and social cohesion. For their potential to translate into sustainable development, states will need to consolidate local processing, strengthen climate and environmental resilience, improve institutional coordination and ensure fair remuneration for producers. The future of export value chains in the region will hinge on their ability to combine international competitiveness, ecological sustainability and social inclusion. In that sense, they represent not only a major economic asset, but also a strategic vector for regional integration and stability.

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