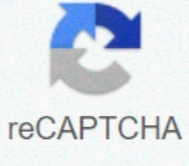




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Why agriculture is the backbone of ethiopian economy

This chapter sets the study in context, reviewing some of the key characteristics of the economies and agriculture sectors of the seven countries participating in the study and specific field-site characteristics. Further details about individual field sites are presented in the case studies in Annex 2. National economyThe study includes the two most populous countries in sub-Saharan Africa (Nigeria and Ethiopia) and some of those with much smaller populations (Malawi and Zambia) (Table 1). Together they are among the poorest countries in the region with only Ghana exceeding the regional average annual per capita income of US\$1 600. Although most economies grew at about 3 percent a year or more in the 1990s, none matched this growth in per capita incomes in the same period. Indeed, income per head declined in Nigeria and Zambia, and remained static in the United Republic of Tanzania. Poverty is widespread and more than two-thirds of the populations of Nigeria, Malawi and Zambia survive on less than US\$1 per day. In the last two decades, most of these countries have witnessed a fundamental restructuring of the role of government within their economies. Exchange rates, interest rates and markets have been liberalized; trade restrictions removed; many state-owned industries privatized; government services decentralized and downsized; and private sector investment encouraged. In some areas, economic activity has also been disrupted by civil war, and the collapse of markets and prices for major commodities (agriculture and minerals). All countries are in the lowest quartile of ranking of the Human Development Index (HDI), which is prepared annually by the United Nations Development Programme (UNDP). Ghana achieved the highest HDI ranking among the study group, reflecting its relatively high per-capita gross domestic product (GDP), high literacy rates and reasonable life expectancy, whereas Malawi and Ethiopia were ranked among the weakest. Agriculture sectorThe significance of the agriculture sector varies considerably. In Ethiopia, Malawi, Uganda and United Republic of Tanzania, agriculture is the backbone of the economy, generating more than 35 percent of GDP and employing more than 80 percent of the workforce; and at least 70 percent of the population live in rural areas (Table 2). In Ghana and Nigeria, agriculture is still significant but no longer the dominant sector, generating one-third of GDP and employing less than 60 percent of the workforce; about 40 percent of the total population live in urban areas. The contribution by agriculture to GDP is least significant in Zambia owing to the dominance of the mining sector; nevertheless, 70 percent of the workforce still work in agriculture. In all the study countries, agricultural GDP grew faster in the 1990s than the preceding decade and, in several places, the rate of growth in the agriculture sector exceeded overall growth in the economy (most notably in Malawi, Zambia and Nigeria). TABLE 1National economies Ethiopia Ghana Malawi Nigeria United Republic of Tanzania Uganda Zambia Total population (millions) 20001 63 19 11 114 35 23 10 Average annual growth rate in population(%) 1975 - 20001 2.6 2.7 3.1 2.9 3.1 3.1 2.9 GDP per capita US\$ (PPP US\$) 20001 668 1 964 615 896 523 1 208 780 Average annual growth rate in total GDP(%) 1990 - 20002 4.7 4.3 3.8 2.4 2.9 7.0 0.5 Average annual growth in per capita GDP(%) 1990 - 20001 2.4 1.8 1.8 -0.4 0.1 3.8 -2.1 Incidence of poverty (% population below US\$1 a day (1993 PPP US\$) 1983 - 20001, 3 31 45 65 70 20 no data 64 Adult literacy rate (aged 15 and above) 20001 39 72 60 64 75 67 78 Country ranking by HDI, 2002 (out of 173 countries)1 168 129 163 148 151 150 153 Notes: PPP = purchasing power paritySources: 1 UNDP (2002), 2 World Bank (2002), 3 National Statistical Office (1998).TABLE 2Changing role of agriculture in the economy Ethiopia Ghana Malawi Nigeria United Republic of Tanzania Uganda Zambia Contribution to GDP (total GDP) 19981 50 35 36 32 46 45 17 Average annual growth rate in agriculture GDP (%) 1980 - 19902 0.2 1.0 2.0 3.3 no data 2.1 3.6 Average annual growth rate in agriculture GDP (%) 1990 - 20002 2.1 3.4 7.6 3.5 3.2 3.7 3.9 Percentage of workforce engaged in agriculture3 83 57 84 35 81 81 70 Population residing in rural areas (% total population) 20002 82 82 85 56 72 86 56 Population residing in urban areas (% total population) 20002 18 38 15 44 28 14 44 Rural population density (people per km2 of arable land)2 520 325 458 250 640 368 105 Sources: 1 World Bank (2000), 2 World Bank (2002), 3 FAO (2001).Structural reform has had a dramatic impact on the viability of rural livelihoods. Without access to seasonal credit or subsidies, the majority of smallholders are unable to purchase fertilizer. The withdrawal of government from trading in agricultural inputs and produce marketing has made it more difficult for farmers in remote areas to access markets and services. Produce prices tend to be variable and low, particularly immediately after harvest when many smallholders are obliged to sell a proportion of their crop in order to generate urgently needed cash. HIV/AIDS is a major challenge facing the agriculture sector in many countries in sub-Saharan Africa. To date, the impact of the disease has been markedly lower in west Africa than other parts of the continent in terms of the proportion of adults living with HIV/AIDS and the relatively small loss borne by the agricultural workforce (Table 3). In eastern and southern Africa, the disease has already started to affect the agriculture sector. In these regions, it is estimated that at least 70 percent of the total losses experienced by the workforce by 2000 were borne by agriculture. The toll of the disease is reflected in the extremely low (and sometimes falling) life expectancy of about 40 years. TABLE 3Health dimensions Ethiopia Ghana Malawi Nigeria United Republic of Tanzania Uganda Zambia People living with HIV/AIDS (% aged 15 - 49) 19991 10.6 3.6 16 5.1 8.1 8.3 20 Losses in agricultural workforce due to HIV/AIDS by 2000 (%)2 4.9 no data 5.8 2 5.8 12.8 3.5 Losses in agriculture as % of losses in total labour force, 2000 (%)2 82 no data 83 33 80 80 69 Losses in agricultural workforce due to HIV/AIDS by 2020 (%)2 9.5 no data 13.8 7 12.7 13.7 16.6 Losses in agriculture as % of losses in total labour force, 2020 (%)2 72 no data 74 18 70 68 57 Life expectancy (years) 1970 - 753 42 50 41 44 47 46 47 Life expectancy (years) 1995 - 20003 45 56 41 51 51 42 41 Sources: 1 UNDP (2001), 2 FAO/ILO (2002) unpublished data, 3 UNDP (2002).Despite the general lack of profitability in agriculture, many countries rely on the sector to play strategic and multiple roles in securing economic growth and development. The sector is expected to grapple with the challenges of environmental degradation, population pressure, persistent poverty, the HIV/AIDS epidemic, and urban migration (particularly among the young), while simultaneously moving communities towards food security and commercial production, providing the base for development in the manufacturing sector through crop processing and value-added activities, and generating export revenues. There is a crucial role for the state to play in terms of ensuring an enabling environment for business and growth, for example, by providing infrastructure (such as roads and markets), regulating traders, and providing market information and extension and advisory services. It also has to be alert to the actual and impending impacts of HIV/AIDS on: the institutional capacity of the extension service and ministries of agriculture, livestock, forestry and fisheries; the relevance of the policy environment; and the productive capacity of the agricultural workforce. Field-site characteristicsThe 14 field sites capture both the diversity as well as some of the similarities found in the farming and livelihood systems of sub-Saharan Africa. In terms of diversity, the sites range from the highlands of Ethiopia (2 600 m above sea level), to Kapchesombe on the slopes of Mount Elgon in Uganda, to lakeshore communities adjacent to Lake Malawi and Lake Kariba (Zambia), to a coastal community in Ghana. Most field sites experience an annual rainfall of about 1 000 mm; more arid sites include Kacaboi in eastern Uganda and Msingisi in eastern United Republic of Tanzania (600 - 900 mm per year), and Simupande in southern Zambia (less than 500 mm per year). Population density varies considerably from fewer than 100 people per km2 in many of the study communities to 270 people per km2 (Ojo, Nigeria) and 350 people per km2 (Kokate Marachere, Ethiopia). TABLE 4Selected farming systems in sub-Saharan Africa Farming system Distribution in sub-Saharan Africa Land area (percentage of region) Agricultural population (percentage of region) Field sites Highland perennial Humid areas in Ethiopia, Uganda, Rwanda, Burundi 1 8 Kokate Marachere, Ethiopia Highland mixed cereals-roots Temperate highland areas in Ethiopia, Eritrea, Lesotho, also Kenya, Angola, Nigeria, Cameroon 2 7 Habru Seftu, Ethiopia Cereal - root crop mixed Dry subhumid areas from Guinea to Ghana, Nigeria and northern Cameroon, Zambia, Malawi and Mozambique 13 15 Babatokuma, Ghana Gyanyganadze, Ghana Sanchitagai, Nigeria Tree crop/ cereal - root crop mixed Humid areas from Côte d'Ivoire to Ghana, Nigeria and Cameroon to Gabon, Congo and Angola 3 6 Ojo, Nigeria Maize mixed Dry subhumid plateau and highland areas (800 - 1 500 m asl); western Cameroon, Nigeria, Kenya, Uganda, United Republic of Tanzania, Zambia, Malawi, Lesotho, Swaziland, Zimbabwe, South Africa 10 16 Lodjwa, Malawi Mwansambo, Malawi Mvomero, United Republic of Tanzania Msingisi, United Republic of Tanzania Kacaboi, Uganda Kapchesombe, Uganda Nteme, Zambia Agropastoral millet/sorghum Semi-arid areas in Senegal, Mali, northern Nigeria, Sudan, southern Zambia, Zimbabwe, Kenya, United Republic of Tanzania 8 9 Simupande, Zambia Source: FAO/World Bank (2001).The farming systems covered by the study vary from the cereal - root crop mixed systems and tree crop systems of west Africa, to the highland mixed and highland perennial systems of Ethiopia, to the maize mixed farming system typical of eastern and southern Africa, and the agropastoral millet/sorghum system found predominantly in southern Africa (Table 4). The principal cash crops vary accordingly. In west Africa, the main cash crops are: yams, maize, cassava, cashew, oil-palm, cocoa, citrus and rice. In eastern and southern Africa, the main cash crops are maize, wheat, groundnuts, beans, rice, coffee, sunflower, cotton, sweet potatoes and vegetables. Reflecting the very small proportion of irrigated land found in sub-Saharan Africa generally, only six field sites in three countries have land under informal irrigation and no formal irrigation schemes were encountered during the study. Farmers in Nigeria practise recession agriculture adjacent to rivers and streams on residual floodwaters (fadama). In Malawi and Zambia, valley bottoms or depressions that retain moisture and form natural drainage systems, called dambos, are utilized for dry-season farming. Poultry and goats are the most common livestock kept for both home consumption and sale. In addition to farming, communities engage in a wide range of non-farm livelihood activities, which are usually demarcated along gender lines. Remittances from relatives living and working elsewhere are commonplace. Further details about the field sites are presented in the case studies in Annex 2 of this report. • According to the Kenya National Bureau of Statistics (KNBS) agriculture accounts for 27% of the country's GDP. The Kenya Agricultural Research Institute (KARI) says that 45% of government revenue is derived from agriculture and the sector contributes more than 50% of export earnings. Over 60% of Kenya's workers are employed in agricultural establishments making the sector the largest employer in Kenya: 75% of Kenya's industrial raw materials is sourced from the agriculture sector. In 2012 agriculture grew by 3.8% as compared to 1.5% in 2011.Agriculture has dominated Kenya's economy going back to the East African Protectorate and Kenya Colony days. For the first 50 years of colonialism agriculture was the main economic activity. Today after 50 years of independence, agriculture is still king. Kenya's bulk agricultural exports include tea, coffee, cut flowers, rice, milk, horticulture, nuts and beef. The main market for Kenyan agricultural produce is the European Union bloc and the Middle East. Members of the Fresh Produce Exporters Association of Kenya (FPEAK) form an increasingly important plank in the country's economy. Fresh fruits, flowers and vegetables are airlifted daily to their international markets. The flowers include carnations, roses, statice, lilies, hypericum and alstromeria. Horticultural products include chillies, karella, aubergines, French beans and snow peas. Mangoes, pineapples, avocados and passion fruit lead the fresh fruits list.In 2013, tea export earnings totalled \$1.4bn, Kenya which is one of the largest tea exporters in the world, has over 50 varieties of tea. Kenya's tea is popular worldwide because it gets a maximum of 12 hours of sunlight each day, is grown along the equator and is free of pests and diseases. Production of tea in Kenya is undertaken by large-scale tea growers and smallholder farmers. There are over half a million smallholder tea farmers in Kenya according to the Tea Board of Kenya. Kenya's main tea markets include, Egypt, Pakistan, the UK, Afghanistan and the UAE. For more than a century, tea has traditionally been grown in Kenya's central plateaus and the Rift Valley highlands. These areas include Mount Kenya, the Aberdare Ranges, Kericho, Nandi and Kisii highlands whose acidic soils and favourable climate foster healthy tea bushes. According to the Export Promotion Council (EPC), 95% of Kenya's tea is exported and Kenya's tea auction based in Mombasa is the second largest in the world.At one time, coffee was the main cash crop export followed by tea. Kenya exported more than 150,000 tonnes of coffee in the late 1980s. Last year Kenya exported 40,000 tonnes of coffee beans. A series of management blunders, poor policies and lack of commitment by government saw this once-thriving sector shrink. Agriculture analysts say that the decline of coffee production has seriously undermined forex reserves and this has in turn had a huge impact on the economy as it was one of the key contributors to GDP. The same woes that have affected coffee growing spilled over and brought down the once-thriving pyrethrum sector, affecting over 200,000 farmers. Following tea in export earnings is the flower industry, which brings in some \$1bn annually. Kenya again leads the world as the largest exporter of cut flowers to the European market with a 38% market share. The main flower-growing areas are around Mt Kenya, Thika, Lake Naivasha, Nakuru, Athi River, Nyandarua, Kiambu, Kitale, Trans Nzoia, Kericho, Uasin Gishu and eastern parts of the country. The sector directly employs 90,000 people. Food imports to be curbedInterestingly, while Kenya has distinguished itself as an agricultural economy, only 9% of the country is arable. According to the Food and Agriculture Organisation (FAO), the 9% arable land accounts for 5.3m hectares. Ironically, while Kenya is a major exporter of cash crops, it is a net importer of food crops, notably grains. This is principally because much of the farming in the country has largely depended on rain-fed agriculture. President Uhuru Kenyatta's government plans to convert grain importing into an export activity. One million acres has been set aside in the Tana Delta region in Kenya's coastal counties of Tana River and Kilifi to set up an irrigated farmland. The Ministry of Agriculture, Livestock and Fisheries will pump some \$42m into the project. The million-acre ranch is eventually expected to rise to 1.75m acres, which will become Kenya's largest single farmland. 500,000 acres will be put under maize, beef and game will occupy 200,000 acres and 300,000 acres will be for sugar cane. Another 150,000 acres will be used for horticulture, 100,000 for dairy and 50,000 acres will be zoned for mangoes and guavas. In line with the million-acre irrigation ranch, the agriculture industry is currently undertaking a full audit to curb losses and gaps in the sector. Even though other sectors, notably building and construction, manufacturing, mining, real estate, finance and telecommunications, have improved tremendously in the last five years, agriculture remains the dominant force of the Kenyan economy. Wanjohi Kabukuru

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