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DYNAMICS OF SOCIO-ECONOMIC PERFORMANCE, FOOD SECURITY, AND THE CHALLENGES OF REGIONAL INTEGRATION IN ECOWAS

COUNTRY REPORT



The Gambia



CHERNO JALLOW & MAMADOU A BARRY

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TABLE OF CONTENTS

ABSTRACT	iv
KEY MESSAGES	v
1. ECONOMIC PERFORMANCE AND PROSPECTS	1
2. ANALYSIS OF SOCIO-ECONOMIC DEVELOPMENT IN 2024	2
2.1 Real Sector	3
2.2 Fiscal Sector	7
2.3 Monetary Sector	10
2.4 External Sector	12
2.5 Direction of Trade	13
2.6 Social Sector	15
3. MACROECONOMIC PERFORMANCE AND OUTLOOK IN THE LIGHT OF THE 2024 EDITION	21
3.1 Real Sector	21
3.2 Fiscal Developments	23
3.3 Monetary Developments	26
3.4 External Sector Developments	28
4. MACROECONOMIC PERFORMANCE AND OUTLOOK (2025–2027)	30
4.1 Key Risk Factors	31
4.2 Policy Recommendations	33



5. ANALYSES OF THE STATE OF FOOD INSECURITY IN THE GAMBIA FROM 2015 TO 2025	36
5.1 The State of Food Security in the Gambia	36
5.2 Review of Maputo, Malabo and Kampala Declaration and Commitments	38
5.3 The level of implementation in the Gambia	40
5.4 Why Economic Growth Has Not Translated into Improved Food Security in The Gambia.	42
5.5 Food Security Trends and Performance	43
5.6 Challenges of Food Security to Socio-Economic Development in The Gambia.	47
5.7 Challenges of Food Security to the ECOWAS Regional Integration Efforts	49
6. SWOT ANALYSIS OF NATIONAL FOOD SECURITY POLICY AND INSTITUTIONAL FRAMEWORK	51
7. CONCLUSION	54
REFERENCES	55



ABSTRACT

The economy of The Gambia experienced fluctuations between 2022 and 2024. However, signs of recovery began to emerge in 2022 following the disruptions caused by the COVID-19 pandemic. The recovery was largely driven by the gradual reopening of international markets, the rebound of key sectors such as tourism and trade, and the normalisation of global supply chains. Consequently, a positive growth was sustained, averaging 5.7 percent between 2022 and 2024. The growth was supported by an improved macroeconomic environment, recovery in tourism-related activities, agriculture, and robust construction activities by both government and the private sector. The medium-term economic outlook remains favourable, although faced with risks. Real GDP growth is projected at 5.9 percent in 2025 and averages 5.0 percent in the medium term. This will benefit from the acceleration of structural reforms outlined in the RF-NDP (2023-2027), growing digitalisation of the economy, and envisaged macroeconomic stability. Despite the positives, the outlook is subject to the risk of global uncertainties and emerging global trade tensions. On the domestic front, key risks may stem from the impact of climate change and election-related uncertainty, elevated SOE-related contingent liabilities, and the risk of rising domestic debt servicing costs. The government should strengthen fiscal consolidation efforts by broadening the tax base and rationalising expenditures, expediting reforms that raise competitiveness and productivity, and protecting critical social and infrastructure spending while trimming non-essential outlays.

KEY MESSAGES

- The economic recovery process gained momentum in 2024. Consequently, real GDP grew by 5.6 percent in 2024. Growth was mainly supported by macroeconomic stability, booming construction, robust inflow of remittances, increase in tourist receipts, and financial and distribute trade-related activities.
- Headline inflation averaged 11.7 percent in 2024, down from 16.9 percent in 2023. The slowdown in inflation was attributed to the tight monetary policy stance, declining global commodity prices, and exchange rate stability. However, this remains above the CBG's medium-term target of 5 percent.
- The continued implementation of domestic revenue mobilisation reforms has yielded fruits. However, it failed to offset spending pressures arising from hosting the OIC summit, and the transfers to support the National Water and Electricity Company (NAWEC). As a result, the deficit widened to 4.0 percent of GDP in 2024, from 3.6 percent of GDP in 2023. The financing was mainly through external borrowing.
- The external sector pressures have somewhat decreased in 2024. The current account deficit narrowed to US\$74.4 million (3.2 percent of GDP) in 2024 from US\$120.1 million (5.5 percent of GDP) in 2023. The improvement was as a result of an increase in tourist arrivals, increased remittance inflows, budget support, and a slowdown in construction-related imports.
- The medium-term economic outlook remained favourable, although faced with some risks. Real GDP growth is projected at 5.9 percent in 2025 and averages 5.0 percent in the medium term. This will benefit from the acceleration of structural reforms outlined in the RF-NDP (2023-2027), growing digitalisation of the economy, and envisaged macroeconomic stability on account of easing inflation and exchange rate pressures. Despite the positives, the outlook is subject to global uncertainties and emerging global trade tensions. On the domestic front, key risks may stem from the impact of climate change and election-related uncertainty, which could have a negative impact on investment choices and elevated SOE-related contingent liabilities. There is also the risk of rising domestic debt servicing



costs, which could crowd out priority spending in the absence of robust grant support.

- Food security remains a major structural challenge in The Gambia, as a significant share of households continue to experience difficulties accessing affordable and nutritious food.
- Agricultural production remains vulnerable to climate variability, low productivity, and limited irrigation, with most farming systems still dependent on rainfall.
- The country's high dependence on imported food commodities, particularly rice, exposes the economy to global price fluctuations and external supply disruptions.
- Strengthening domestic agricultural production, improving rural infrastructure, and promoting climate-resilient farming practices are essential for enhancing food security and supporting sustainable economic development

1. ECONOMIC PERFORMANCE AND PROSPECTS

The Economic Community of West African States (ECOWAS) Commission was tasked with developing and disseminating an Annual ECOWAS Regional Economic Outlook (EREO) at the Thirty-Second Ordinary Meeting of the ECOWAS Administration and Finance Committee (AFC). In view of the aforementioned, this country note is developed to support policy analysis and research on applied socio-economic dynamics to address the pillars of ECOWAS Vision 2050. Policymakers will learn more about the ECOWAS region's economic potential as a result. Additionally, the ECOWAS Commission will use this as a roadmap to improve effective economic surveillance in managing Member States' economies and making well-informed decisions regarding internal or external difficulties the region may encounter.

The objective of the 2025 ECOWAS Regional Economic Outlook Edition is to provide updates on macroeconomic performance from 2022 to 2024, recent economic developments, and the Outlook considering the 2024 edition. Moreover, it provides a thorough examination of the socio-economic challenges confronting The Gambia as well as the opportunities that present themselves in a changing global landscape.

This report is in two main sections. Section I covers the recent developments in the real, fiscal, monetary and external sectors, as well as the socio-economic indicators. Section II analyses the state of food (in)security in The Gambia from 2015 to 2025. It concludes by providing a SWOT analysis of The Gambia's food security policy and institutional architecture, as well as the external opportunities and threats affecting it. This encompasses broad policy frameworks, coordination capacity, investment strategies, and implementation mechanisms, in line with regional commitments (CAADP/NEPAD) and partner evaluations.



2. ANALYSIS OF SOCIO-ECONOMIC DEVELOPMENT IN 2024

Since the aftermath of the COVID-19 pandemic in 2020, The Gambia, like many small, open economies in the region, has faced a series of overlapping shocks. These include the ripple effects of the Russia-Ukraine war, conflicts in the Middle East, trade wars, and increasing geopolitical fragmentation. These shocks have significantly impacted the country's macroeconomic conditions, diverting focus from the ambitious goals outlined in the National Development Plan 2018–2021. This plan aimed to consolidate democratic gains, stimulate inclusive economic growth, address structural socio-economic challenges, and enhance citizen engagement while promoting a secure, cohesive, and sustainable society. However, the unexpected nature of these shocks proved challenging, highlighting the extent of global economic integration.

Between 2022 and 2023, the country was faced with elevated inflation, foreign exchange volatility, and widening fiscal deficits, all of which strained household welfare and constrained policy space for development spending. Headline inflation jumped to 16.9 percent in 2023, the highest in 2 decades, largely driven by global commodity price shocks, depreciation of the Dalasi, and the pass-through of imported inflation into food and energy prices. The Central Bank of The Gambia (CBG) responded with a cumulative 700 basis-point increase in the monetary policy rate, raising it from 10 percent in April 2022 to 17 percent by August 2023, where it remained until November 2025. Despite these tightening measures, inflationary pressures proved sticky, eroding real incomes and pushing an estimated additional 0.5 percentage points of the population into extreme poverty.

On the fiscal front, the overall budget deficit widened to 3.58 percent of GDP in 2023, up from 3.6 percent in 2022, as expenditure pressures, particularly from the logistical costs of hosting the OIC summit, transfers to the National Water and Electricity Company (NAWEC), and rising debt service obligations, outpaced revenue receipts. Total public debt climbed to 81.0 percent of GDP in 2024, reversing the modest decline recorded in 2023 and placing the country above the ECOWAS average of 59 percent. The external sector also came under pressure, with the current account deficit widening to US\$120.1 million (5.5 percent of GDP) in 2023, reflecting a surge in construction-related imports and a deterioration in the terms of trade due to higher global food and fuel prices. Foreign

exchange reserves, while still adequate at around 4.3 months of import cover, faced renewed pressure from drawdowns.

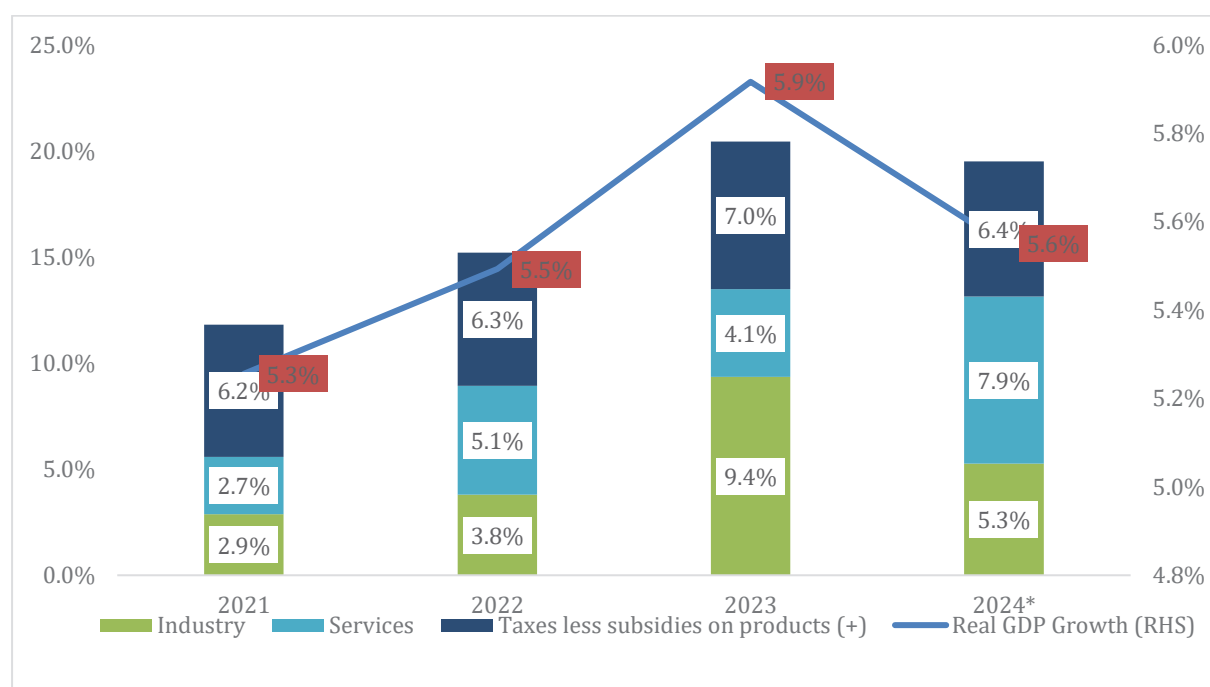
Social indicators show persistent structural vulnerabilities. The national unemployment rate rose to 8.3 percent in 2024, with youth unemployment (ages 15–35) reaching 11.5 percent. Food insecurity affected about 29 percent of households in 2023, with rural areas disproportionately impacted. Poverty remained widespread, with about 53.4 percent of the population living below the national poverty line, showing the fragility of the post-pandemic recovery and the limited reach of social protection systems.

2.1 Real Sector

2.1.1 GDP Growth

The economic recovery process gained momentum in the aftermath of the pandemic and easing pressure from the Russia–Ukraine war, building resilience from a semi-decade of shocks that saw real GDP rise from 0.6 percent in 2020 to 5.6 percent in 2024. Between 2022 and 2024, growth averaged 5.7 percent, with the services sector leading the rebound, growing from 5.1 percent in 2022 to 7.9 percent in 2024, driven by tourism, financial services, and wholesale trade. Industry also performed strongly, growing by 5.3 percent in 2024, supported by booming construction and the commissioning of the Jambur Solar PV Power Plant. Agriculture, however, remained the slowest-growing sector. After contracting by 13.7 percent in 2021, the sector recovered to 7.5 percent in 2022 but then slowed sharply to 0.3 percent in 2024, as uneven rainfall distribution and flash floods damaged rice and groundnut yields. The MTEFF 2024 had projected 6.2 percent growth for 2024, but the actual outturn of 5.6 percent reflected this agricultural underperformance. On the demand side, slower inflation, a stabilising exchange rate, robust remittance inflows, and increased tourist receipts provided critical support. While The Gambia's growth trajectory has historically trailed the Sub-Saharan Africa (SSA) and ECOWAS averages, it has outperformed most regional peers since 2022, showing the economy's underlying resilience despite persistent structural vulnerabilities.



Figure 1: Trend in GDP Growth

SOURCE: GBOS

2.1.2 Agriculture

Despite support from the government and development partners – including fertiliser subsidies, ploughing services, matching grants, and high-yield seeds – agricultural growth remained weak due to unfavourable weather conditions, which caused a decline in rice and groundnut production. The slight overall growth in agriculture was primarily supported by the livestock subsector, as well as fisheries and aquaculture, both of which benefitted from improved availability of pasture and water. Additionally, there has been a renewed focus on aquaculture development.

However, despite significant investments in the sector, agricultural growth has declined, reaching its lowest rate during the review period. Initially, the sector recorded a strong growth rate of 13.7 percent, largely driven by the fishing and aquaculture subsector, which grew by 20.8 percent and remained the largest contributor to agriculture. Meanwhile, the crop subsector's contribution has been declining since 2021.

Figure 2: Sub-Sectoral Contributions to Growth in Agriculture

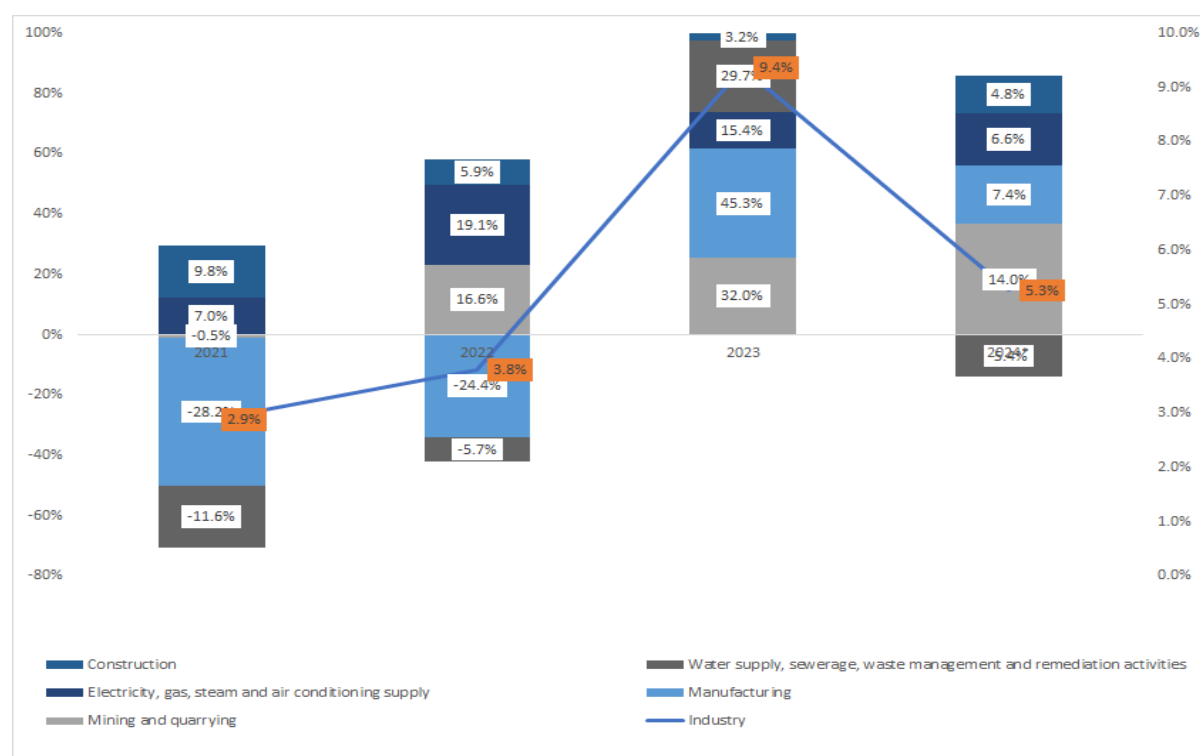
Source: GBoS

2.1.3 Industry

Over the years, the industrial sector has experienced steady growth, starting with a growth rate of 2.9 percent in 2021. This initial growth followed a significant 28.2 percent contraction in manufacturing activity, reflecting the recovery from the COVID-19 pandemic. Since then, the manufacturing subsector has regained momentum. Growth in the industrial sector peaked in 2023, largely driven by construction and the rapid expansion of manufacturing.

In 2024, the industrial sector grew by 5.3 percent. This growth was supported by all subsectors except for water supply. The government's commitment to addressing the infrastructure deficit, coupled with increased remittances, has bolstered both public- and private-sector construction. Additionally, mining and quarrying continued to grow due to heightened construction activities. The launch of the Jambur Solar PV Power Plant, which has an installed capacity of 23 MWp, in June 2024 has further enhanced NAWEC's internal power generation. This advancement has resulted in increased capabilities for power generation, transmission, and distribution.

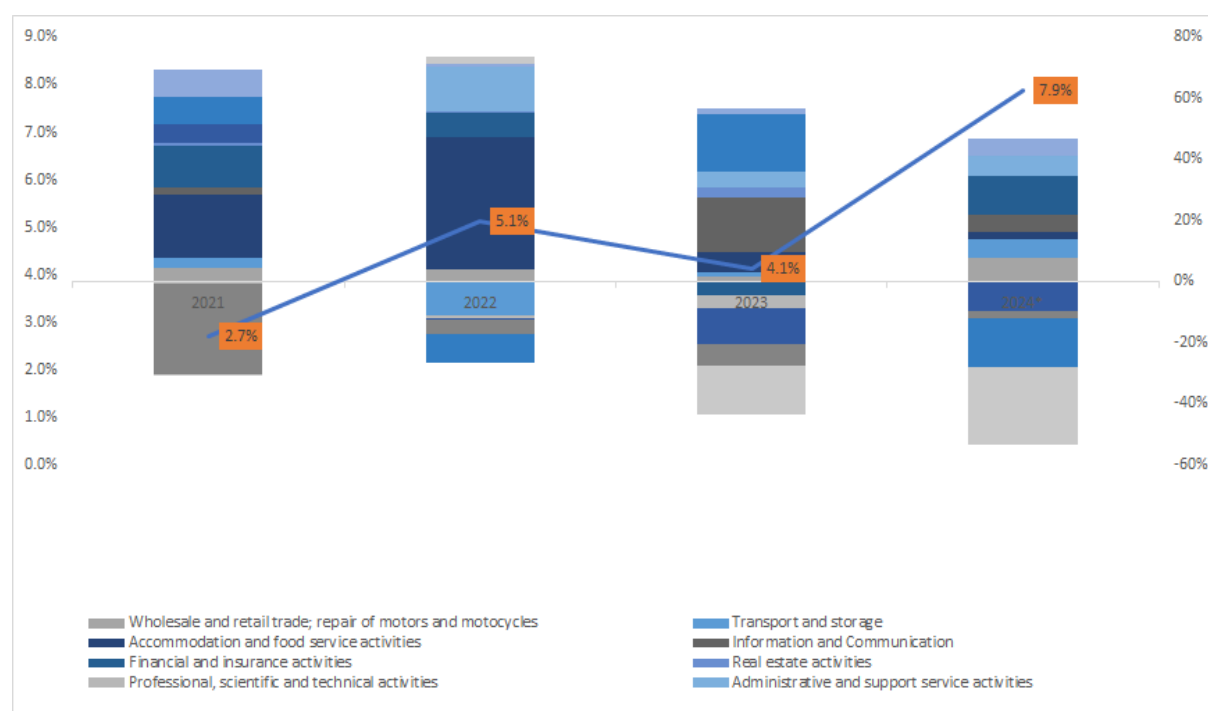


Figure 3: Sub-Sectoral Contributions to Growth in Industry

Source: GBoS

2.1.4 Services

In recent years, the service sector has experienced significant growth following the 2020 pandemic-induced downturn. The sector contracted by 5 percent in 2020 but rebounded to a growth of 2.7 percent in 2021. The primary driver of this recovery has been the wholesale and retail sub-sector. By 2024, the service sector's growth accelerated to 7.9 percent, up from 4.1 percent in 2023. This growth was supported by several factors, including price stability, increased consumer spending, a rise in tourist receipts, improvements in transportation due to the completion of infrastructure projects, and strong performance in financial and insurance activities.

Figure 4: Sub-Sectoral Contributions to Growth in Services

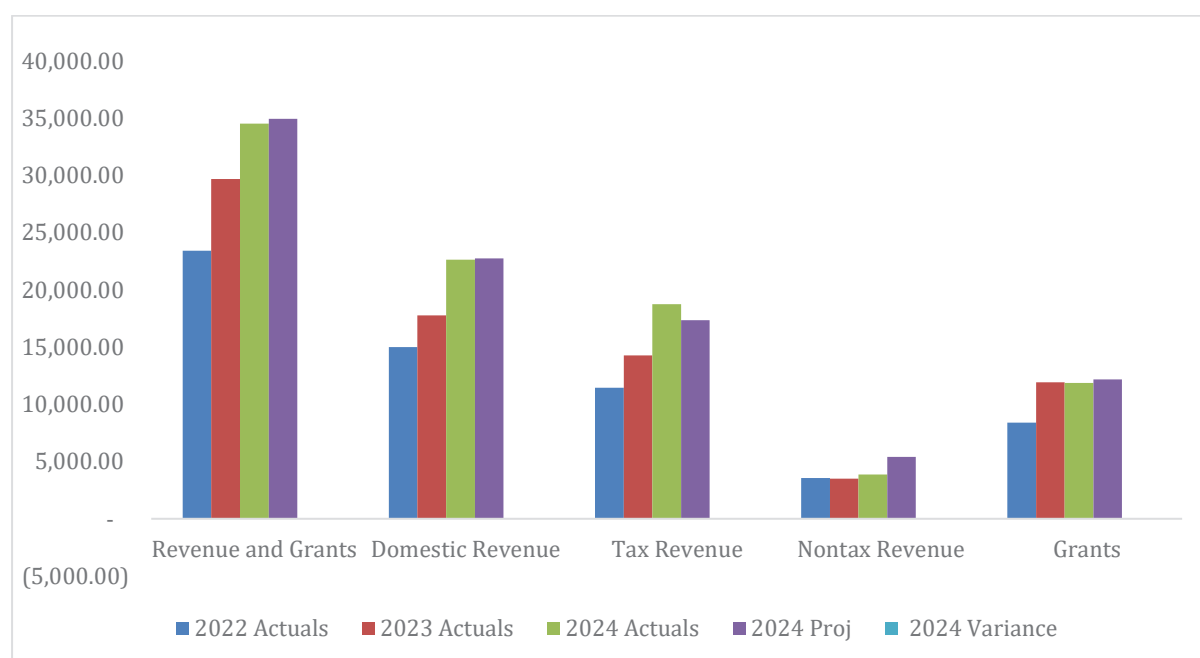
Source: GBoS

2.2 Fiscal Sector

2.2.1 Revenue and Grants

Total revenue and grants amounted to D 34.5 billion (US\$ 500.3 million) (20.4 percent of GDP) in 2024, up from D 29.7 billion (US\$ 430.7 million) (21.2 percent of GDP) recorded in 2023. However, it underperformed against the national budget target of D 34.9 billion (US\$ 506.05 million) in 2024. This was mainly due to lower-than-expected disbursement in project grants. Domestic revenue collection amounted to D22.6 billion, against the target of D22.8 billion. The shortfall was due to lower-than-expected nontax revenue collection. Tax revenue increased to 11.5 percent of GDP in 2024, up from 9.8 percent of GDP in 2023. The continued growth reflects effective implementation of reforms aimed at enhancing domestic resource mobilisation, reducing reliance on revenue generated from international trade, and mitigating the impact of revenue vulnerability to exogenous shocks.

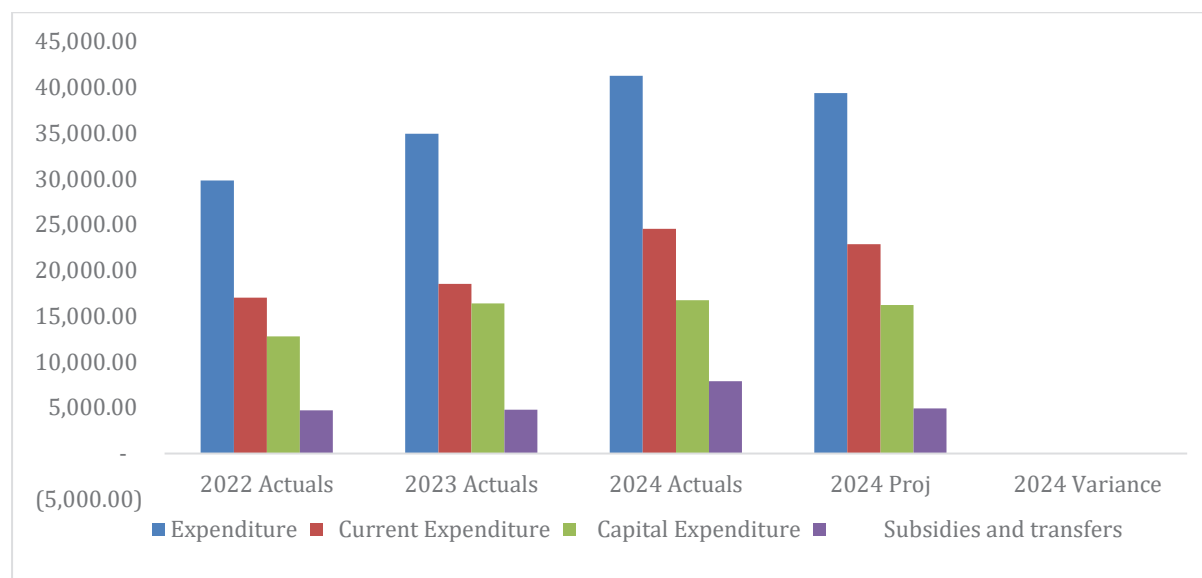


Figure 5: Revenue and Grants (GMD Million)

Source: MoFEA

2.2.2 Expenditure

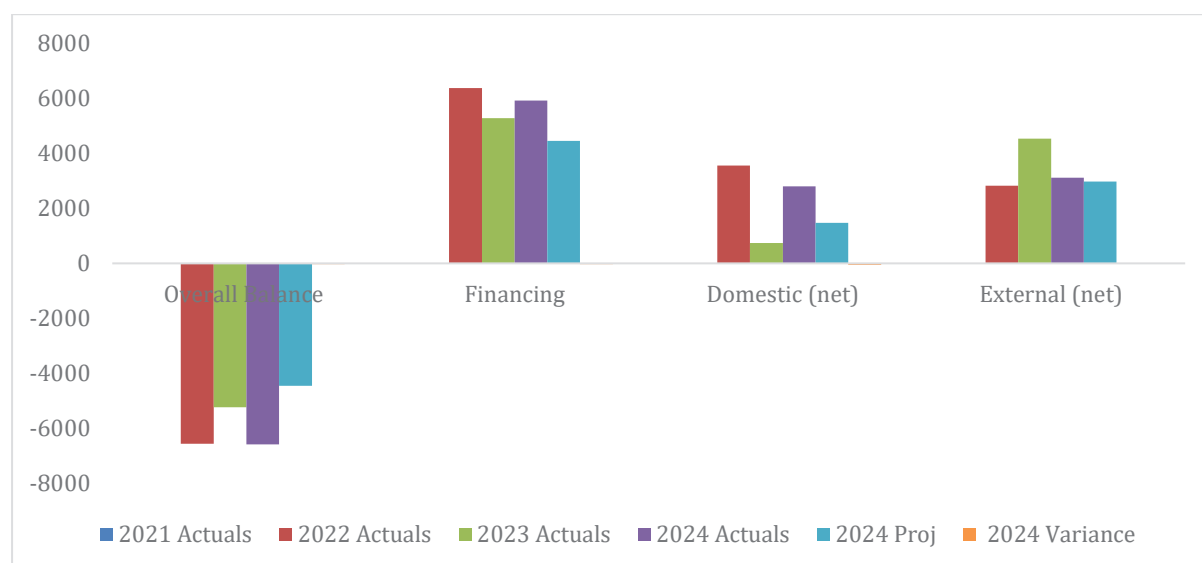
Total expenditure amounted to D41.3 billion (US\$ 598.85 million) in 2024, representing an increase of 18.2 percent relative to 2023. The increase was because of overruns in subsidies and transfers, resulting from spending pressures from the logistical costs of hosting OIC summit, support to the electricity sector and transfers to State-Owned Enterprises. Capital spending accelerated to D16.7 billion (US\$ 242.15 million) against the target of D16.2 billion (US\$ 234.9 million), representing an overrun of 3.2 percent. The overrun emanated mainly from externally financed capital owing to higher execution than expected in road construction, hospitals, clinics, health facilities, Governor's residences, schools, and laboratories.

Figure 6: Expenditure (GMD Million)

Source: MoFEA

2.2.3 Overall Budget Balance and Financing

Despite the overperformance in total revenue, the deficit widens to 4.0 percent of GDP in 2024, from 3.6 percent of GDP in 2023. This was driven by high spending pressures arising from hosting the OIC summit, and the transfers to support NAWEC. The deficit was financed mainly through external borrowing.

Figure 7: Overall Budget Balance and Financing (GMD million)

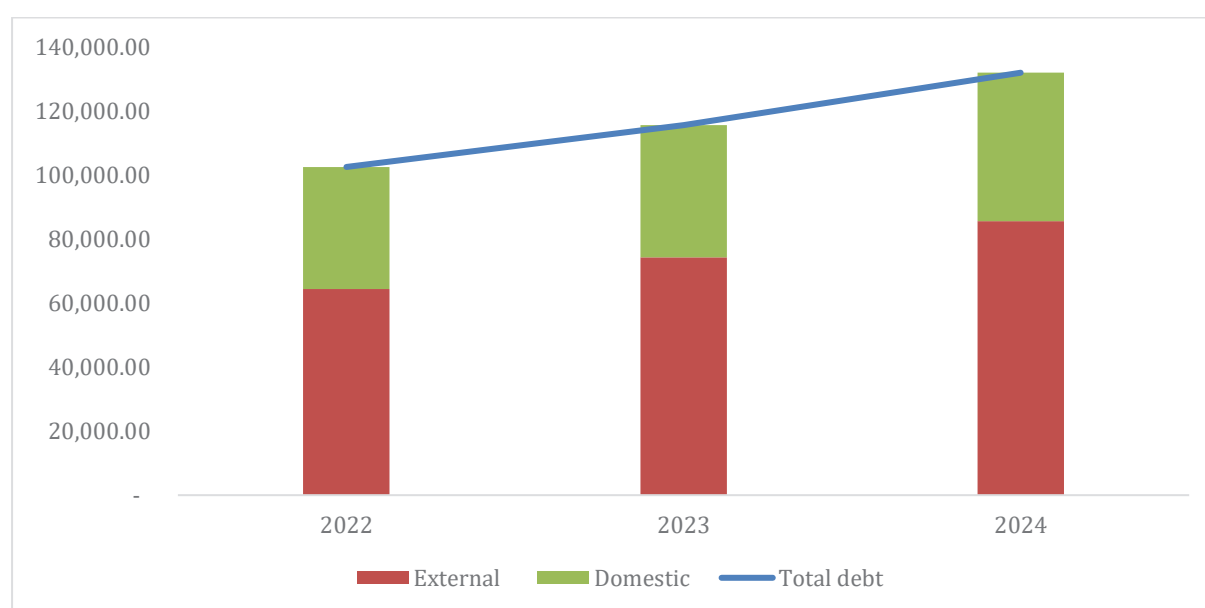
Source: MoFEA



2.2.4 Public Debt

The public debt stock increased to 81.0 percent of GDP in 2024 from 79.2 percent in 2023. This is despite the fiscal consolidation efforts by the government and commitment to adhere to the Medium-Term Debt Strategy, which seeks to meet financing needs at minimum cost as part of broader measures to ensure debt sustainability. The country's level of debt to GDP remains above the ECOWAS average of 59 percent of GDP in 2024.

Figure 8: Public and Publicly Guaranteed Debt

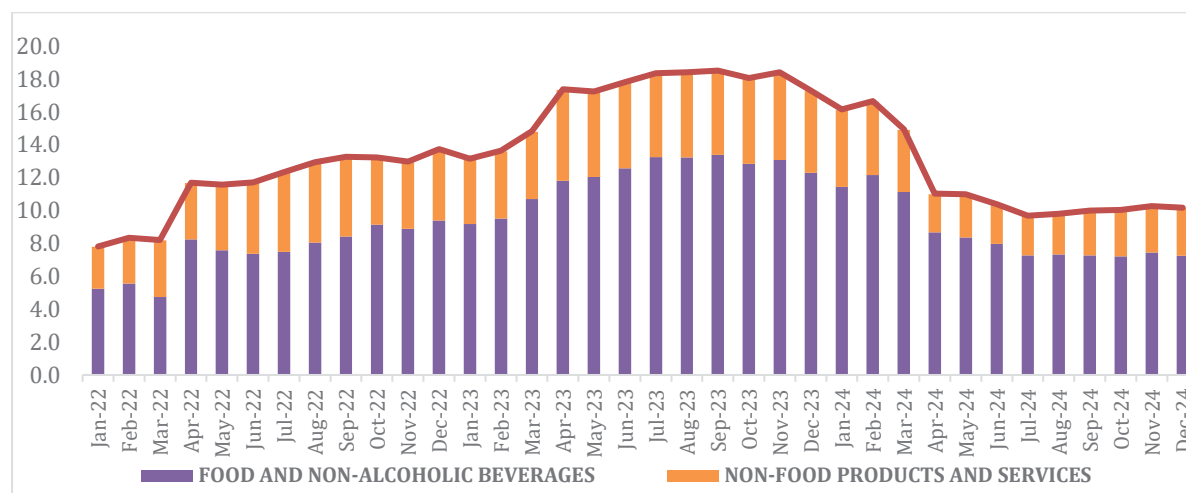


Source: MoFEA

2.3 Monetary Sector

2.3.1 Inflation

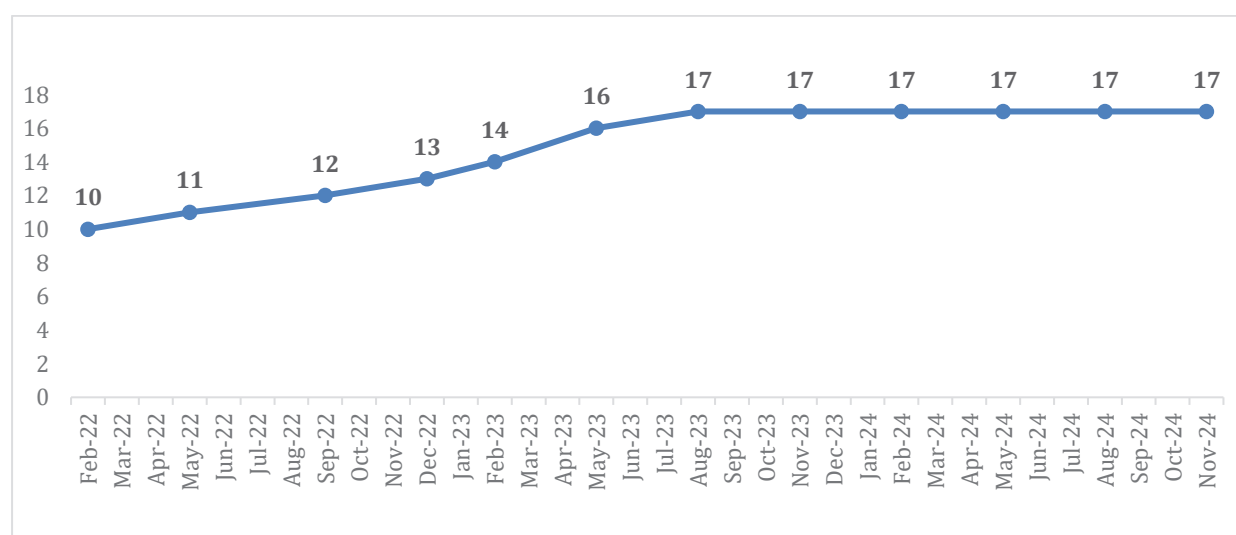
Headline inflation averaged 11.7 percent in 2024, down from 16.9 percent recorded in 2023. The slowdown in inflation was attributed to the tight monetary policy stance, declining global commodity prices, and exchange rate stability. However, this remains above the CBG medium-term target of 5 percent. The Gambia is sensitive to changes in external factors like global food and energy prices. As a net importer of essential foods and energy, food and energy account for 50 percent and 6 percent, respectively, of the consumer price index (CPI).

Figure 9: Monthly Inflation (%)

Source: GBoS

Monetary Policy Response

The CBG maintained a tight monetary policy stance to tame inflation, despite a slowdown in inflation. The monetary policy rate was held at 17 percent during the monetary policy committee meetings in 2024. The policy rate has remained unchanged since August 2023. This was meant to ensure sustained inflation deceleration.

Figure 10: Monetary Policy Rate (%)

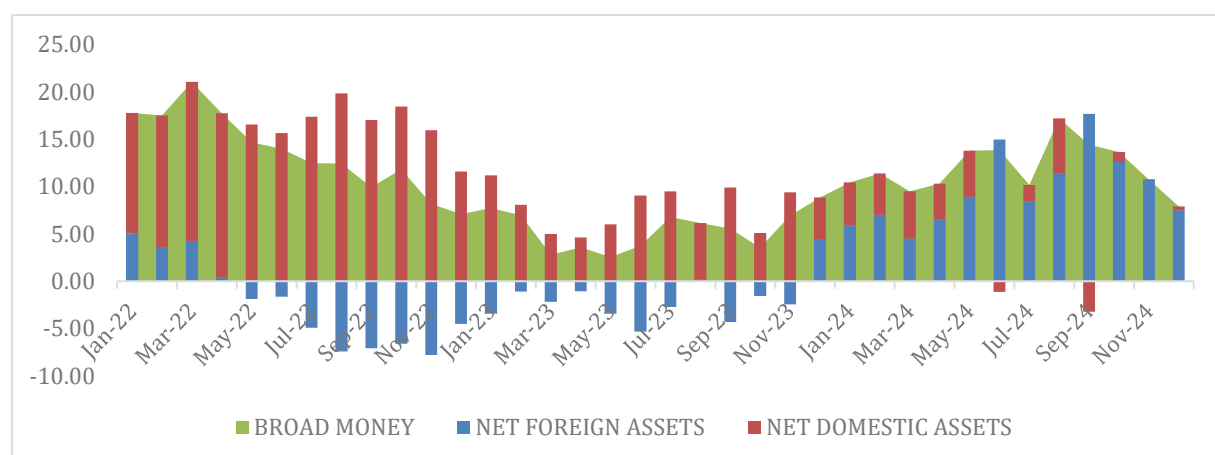
Source: CBG



2.3.3 Monetary Aggregates

Annual growth in broad money moderated to 7.9 percent as at the end of December 2024, down from 8.8 percent in the same period in 2023. This was due to the contraction of the Net Domestic Assets (NDA), following a decline in credit growth to public enterprises. The growth in public enterprises contracted by 21.0 percent in 2024 after growing by 40.3 percent in 2023. Conversely, credit to the public and private sectors grew by 33.0 and 24.3 percent in 2024, respectively. The Net Foreign Assets (NFA) of the banking sector was the primary driver of money supply growth in 2024, contributing 8.3 percentage points. This was attributed to the recovery of the tourism sector, grant disbursements, and increased private remittances.

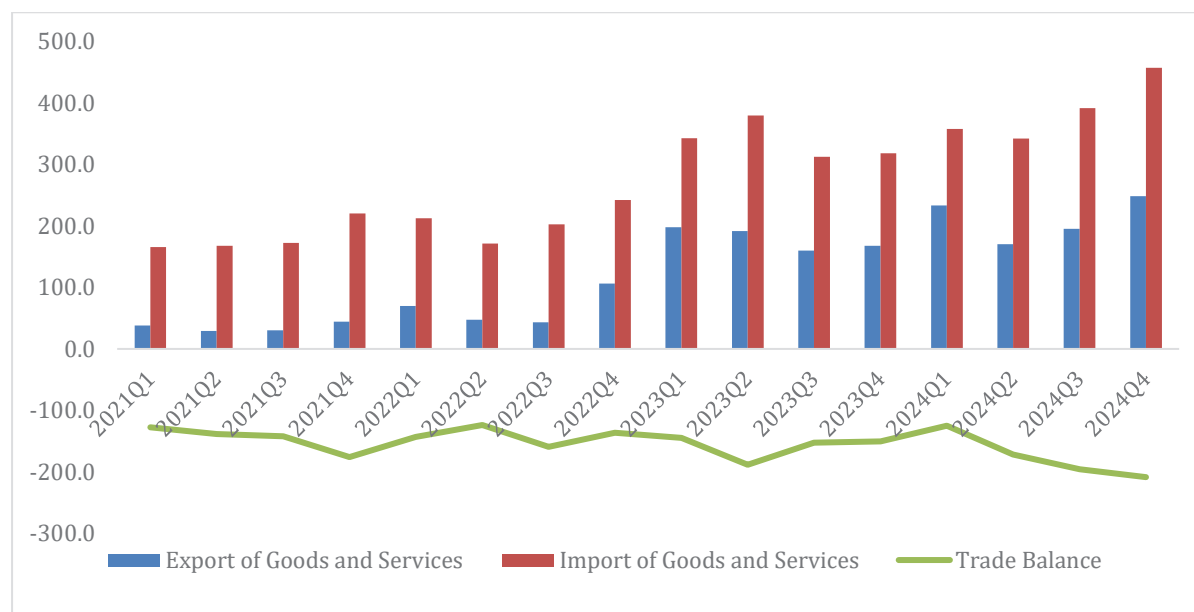
Figure 11: Annual Broad Money Growth (%)



Source: CBG

2.4 External Sector

Compared to 2023, external sector pressures have somewhat eased in 2024. The current account deficit narrowed to US\$103.9 million (4.4 percent of GDP) in 2024, down from US\$120.1 million (5.5 percent of GDP) in 2023. The improvement was due to an increase in tourist arrivals, increased remittance inflows, budget support, and a slowdown in construction-related imports. The Gambia is now among the group of ECOWAS countries with a CAD below 5.0 percent of GDP in 2024.

Figure 12: Trade Account Developments

Source: CBG

2.5 Direction of Trade

2.5.1 Imports

The ECOWAS region remained the principal source of The Gambia's imports in 2024, accounting for approximately 30.0 percent of total import value. Import flows from ECOWAS exhibited notable fluctuations over the period: the value of imports declined from GMD 17.7 million (US\$ 261,960) to GMD 14.6 million (US\$ 216,080) before rebounding sharply to GMD 20.3 million (US\$ 284,200) in 2024. This recovery likely reflects the normalisation of regional trade dynamics following the disruptions associated with the COVID-19 pandemic. Trade within the ECOWAS bloc is largely concentrated in petroleum products and agricultural commodities, which remain essential inputs for domestic consumption and production.

Asia constituted the second-largest source of imports, representing about 24.5% of total imports in 2024. Key partners within the region include China, India, and Brazil. Imports from these economies are dominated by staple food products and manufactured goods, including rice, sugar, and pharmaceutical products, reflecting The Gambia's reliance on external markets for food security and essential medical supplies.



Imports from European Union member states and economies in the Americas also remain significant. These flows are primarily composed of motor vehicles, second-hand consumer goods, and selected agricultural products. Collectively, these patterns underscore The Gambia's diversified import structure, with regional markets supplying energy and agricultural goods, while Asian and Western partners provide manufactured products and key consumer staples.

Table 1: Direction of Total Imports by Region (D'000)

Region	2022	2023	2024
ECOWAS	17,764,870	14,596,092	20,378,921
Americas	3,449,019	3,565,314	6,092,119
Asia	14,342,915	19,021,376	16,686,858
EU	6,853,107	12,041,060	16,248,059
Others	2,478,864	2,123,113	8,570,034
Total Imports	44,888,775	51,346,955	67,975,991

Source: MOTIE

2.5.2 Exports

The ECOWAS region remains the main market for the Gambia's exports. However, the withdrawal of some member states, especially Mali, led to underperformance of total exports to the ECOWAS region. The major exports to ECOWAS are fish and fishery products, fish meal flour, and re-exports of products.

Table 2: Direction of total exports by region (D'000)

Region	2022	2023	2024
ECOWAS	1,401,777	4,341,888	1,802,974
Asia	983,013	641,923	1,430,561
EU	552,724	184,629	165,484
Americas	12,230	11,583	14,380
Others	5,267	4,433	488
Total exports	2,955,012	5,184,456	3,413,887

Source: MOTIE

2.6 Social Sector

2.6.1 Demographic Structure:

The Gambia Population and Housing Census (GPHC) revealed that the population of the Gambia was 2.4 million as of 2024, with an average annual growth rate of 2.5 percent between 2013 and 2024. There were roughly 1.2 million males representing about 49.0 percent of the total population, while females represented roughly 1.24 million, about 51.0 percent of The Gambia's population in 2024. In terms of regional growth, Brikama is the most populous, accounting for 47.5 percent of the total population, followed by the Kanifing municipality, accounting for 15.7 percent. The country's population was characterised by a predominantly youthful population, with 40.8 percent under 15 years of age and only 3.0 percent, 65 years and above. This dependent population is likely to put pressure on the working-age population, 15 to 64 years, which accounts for 56.2 per cent of the population. The 15-64 years category represents the productive economic age group, which plays a crucial role in the country's economic growth.

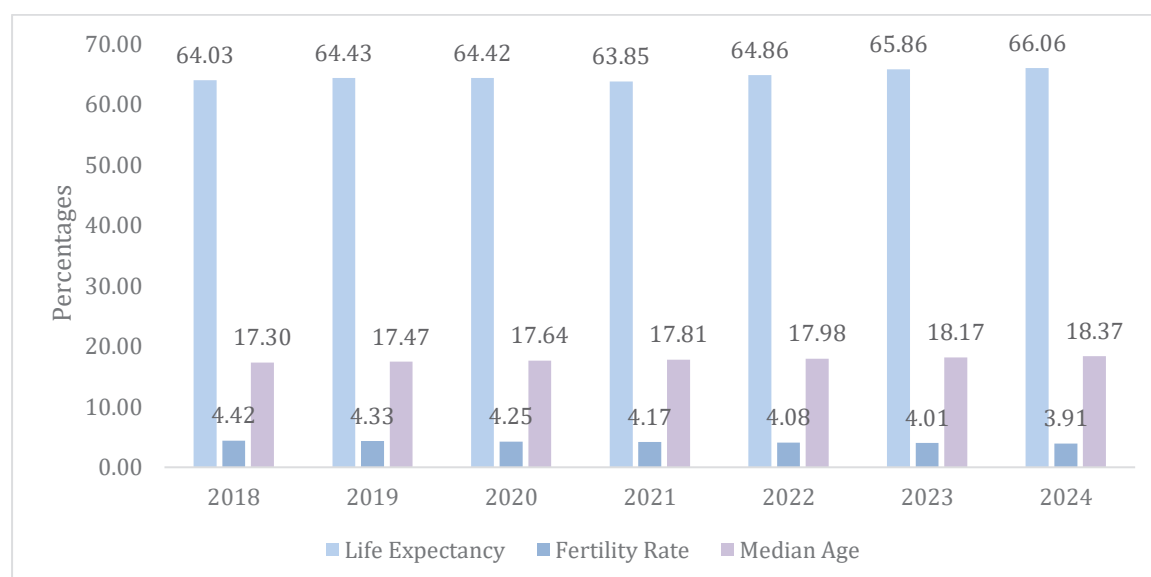


Table 3: Distribution of Population Count by Local Government Areas (1973-2024)

LGA	Population count						% share of population					
	1973	1983	1993	2003	2013	2024	1973	1983	1993	2003	2013	2024
National	493,499	687,817	1,038,145	1,360,681	1,857,181	2,422,712	100	100	100	100	100	100
Banjul	39,179	44,188	42,326	35,061	31,054	26,461	7.9	6.4	4.1	2.6	1.7	1.1
Kanifing	39,404	101,504	228,214	322,735	377,134	379,348	8	14.8	22	23.7	20.3	15.7
Brikama	91,013	137,245	234,917	389,594	688,744	1,151,128	18.4	20	22.6	28.6	37.1	47.5
Mansakonko	42,447	55,263	65,146	72,167	81,042	90,624	8.6	8	6.3	5.3	4.4	3.7
Kerewan	93,388	112,225	156,462	172,835	220,080	248,475	18.9	16.3	15.1	12.7	11.9	10.3
Kuntaur	47,669	57,594	67,774	78,491	96,703	118,104	9.7	8.4	6.5	5.8	5.2	4.9
Janjanbureh	54,232	68,410	88,247	107,212	125,204	147,412	11	9.9	8.5	7.9	6.7	6.1
Basse	86,167	111,388	155,059	182,586	237,220	261,160	17.5	16.2	14.9	13.4	12.8	10.8

Source: GBoS

The Gambia has experienced a declining fertility rate in recent years. The fertility rate declined from 4.1 births per woman in 2023 to 3.9 births per woman in 2024, which is below the regional average of 4.4 births per woman in the same period. This is driven by the increasing number of women using family planning – traditional or modern contraceptive methods – to curb pregnancy. Moreover, life expectancy has sharply increased over the years from 64.9 years in 2022 to 65.9 years in 2023 and 66.1 years in 2024, highlighting continued health and mortality improvement.

Figure 13: Trends in Life Expectancy, Fertility Rate, and Median Age in the Gambia (2018-2024)

Source: Authors' computation based on UN Population Division Database

As in other parts of the world, the rise in rural-urban migration in The Gambia has considerably increased over the years, with more people now living in urban areas (64.3 percent) compared to rural areas (35.7%) as of 2024. This is driven by high rates of poverty, persistent lack of employment opportunities in rural areas, and concentration of economic activities within the urban areas of Kanifing municipality and Brikama region.

2.6.1 Poverty and Inequality

The extreme poverty rate in The Gambia has declined from 16.1 percent in 2023 to 15.5 percent in 2024. This improvement is driven by decreasing inflationary pressure and rising incomes of households through remittance inflows and labour income. The Gambia was ranked 174 out of 184 countries with an HDI of 0.465 in 2022, however, it improved as the country was ranked 171 out of 189 countries on the Human Development Index (HDI) in 2023 with a score of 0.524 (UNDP, 2021).

Inequality remained a challenge in The Gambia, with the inequality gap higher in urban areas than rural areas. Inequality in The Gambia, as measured by the Gini index, stands at 0.4 as of 2022, indicating that the country's income is concentrated among a limited segment of the population (IHS, 2020). This figure is slightly below the median value for low-income countries in the Sub-Saharan region. Consequently, factors like low literacy level, limited employment opportunities, and a large unskilled labour force exacerbate these challenges, underscoring the need for the Gambian government to provide inclusive policies and development strategies to address the root cause of inequality in the country.

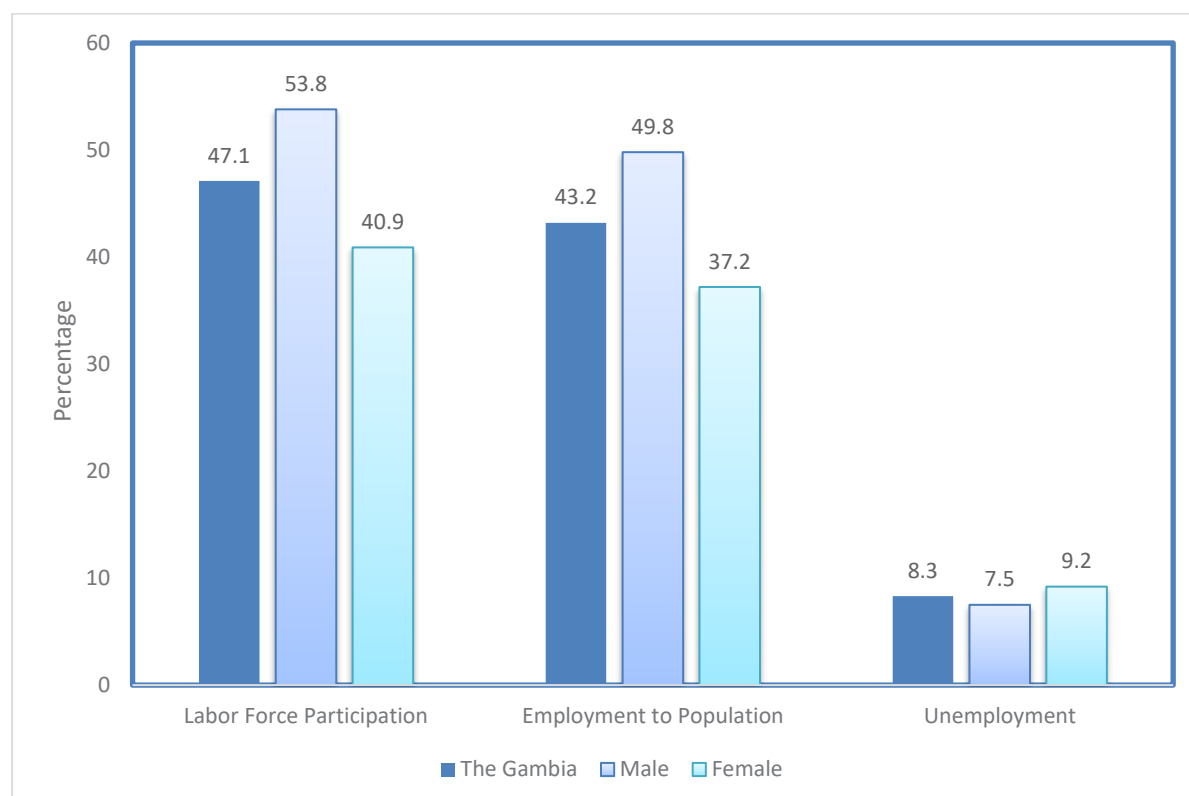
2.6.2 Unemployment

Unemployment remains a pertinent issue affecting most Gambians, particularly in rural areas. According to the Gambia Labour Force Survey (GLFS), the total labour force participation rate improved slightly from 43.6 percent in 2023 to 47.1 percent in 2024, suggesting a more active labour participation rate over the different periods. The national unemployment rate rose to 8.3 percent. Male unemployment rate decreased from 7.6 percent in 2023 to 7.5 percent in 2024, while female unemployment rate increased from 7.2 percent to 9.2 percent in the same period, indicating a gender disparity in the labour force. The GLFS survey further revealed that the overall employment-to-population ratio for the



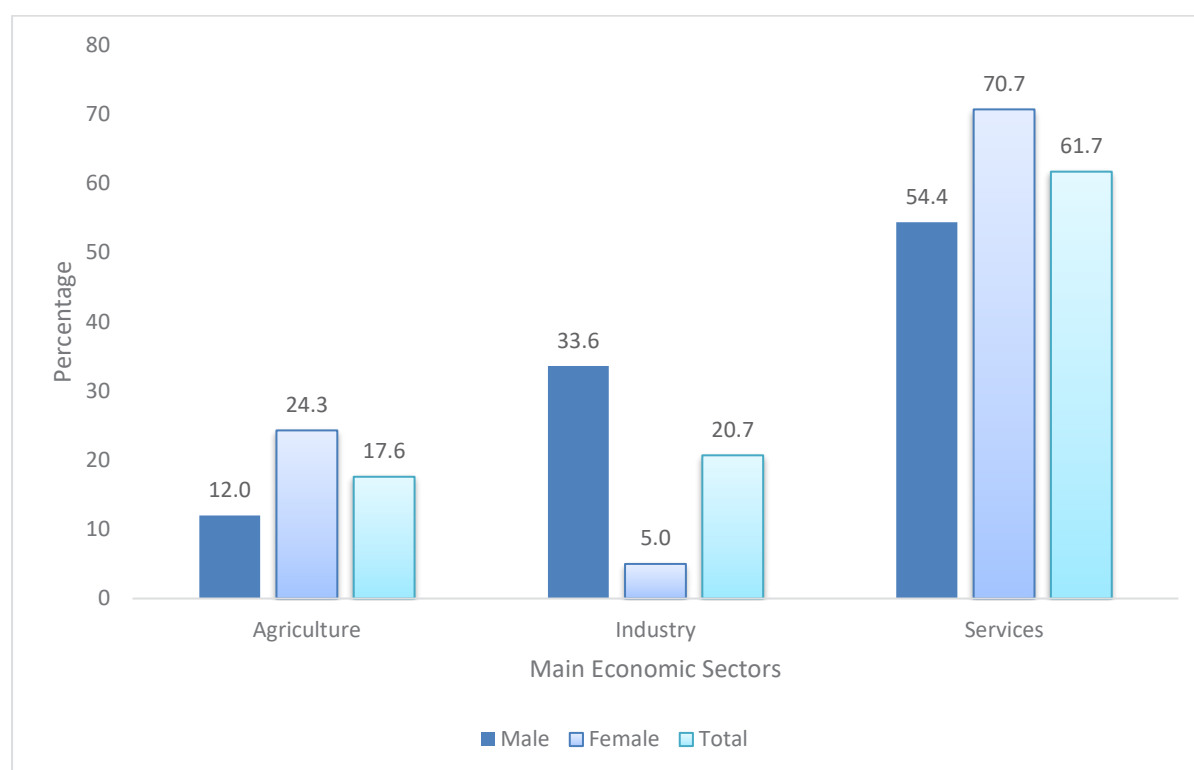
working population increased from 40.3 percent to 43.2 percent. Moreover, youth unemployment remains a major challenge in 2024, with an estimated 11.5 percent of youths aged 15-35 unemployed. These figures highlight persistent structural challenges, including limited employment opportunities, low skills development, gender disparity, and skills mismatches between education and job requirements.

Figure 14: Labour Force participation and unemployment in the Gambia



Source: Authors, based on GBos 2024-25 Labour Force Survey.

The sectoral employment pattern in The Gambia, as shown in Figure 5, indicates considerable disparities. The services sector is the largest employer, with a predominantly female proportion of 70.7 percent. The industrial and agricultural sectors also have notable disparities in terms of gender. Males dominate the industrial sector while females dominate the agricultural sector.

Figure 15: Share of employment by economic category

Source: Authors, based on GBoS 2024-25 Labour Force Survey

2.6.3 Education

The education sector registered notable improvements in 2024 compared to 2023. This was due to interventions by the Government and development partners, which led to an increase in the number of institutions. The completion rate improved for all levels, while gross enrolment showed mixed performance, with Lower Basic Education (LBE) slowing to 102.8 percent (Table 4). This is attributed to a reduction in new entrants for grade 1. However, the proportion of students with ECD increased from 70.1 percent in 2023 to 77.2 percent in 2024.



Table 4: Education Performance Statistics

Year	2022	2023	2024
Gross Enrolment (Percent)			
ECD	42.9	43.7	44.8
LBE	104.7	104.7	102.8
UBE	73.7	77.	77.6
SSE	52.7	55.3%	55.9
Completion Rate (Percent)			
LBE	88.1	87.8	89.8
UBE	62.6	65.3	67.0
SSE	44.1	46.6	48.1
Number of Institutions			
ECD	1,497	1,556	1,609
LBE	1,260	1,321	1,364
UBE	539	576	610
SSE	222	237	256
Trained Facilitators			
ECD	3,283	3,442	3,671
LBE	11,302	11,893	12,122
UBE	5,881	6,361	6,615
SSE	3,394	3,686	3,938

Source: MoBSE

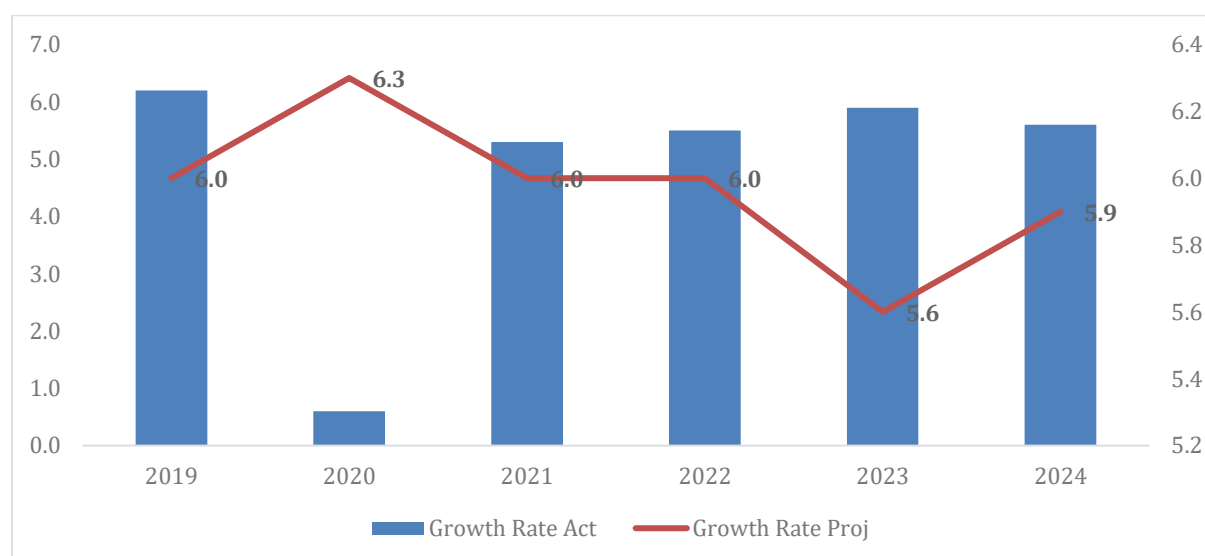
3. MACROECONOMIC PERFORMANCE AND OUTLOOK IN THE LIGHT OF THE 2024 EDITION

3.1 Real Sector

3.1.1 GDP Growth

Economic recovery was underway in 2022, albeit at a slower pace due to the impact of the Covid19 pandemic and the ripple effects of the Russia-Ukraine war. The emergence of the war in Gaza fuelled pre-existing vulnerabilities. Consequently, GDP remained below the Budget projections. Despite these, positive growth was sustained, averaging 5.7 percent between 2022 and 2024. The growth was supported by an improved macroeconomic environment, recovery in tourism-related activities, agriculture, and robust construction activities by both the government and the private sector.

Figure 16: Trend in GDP Growth



Source: GBoS

3.1.2 Agriculture

The agricultural sector continued to benefit from the favourable rainfall season. Improved investment efficiency in agricultural projects by the government and development partners, coupled with increased private sector involvement, led to remarkable growth in crops like rice, groundnuts, and maize. The livestock sub-sector has registered wider



coverage of small ruminants and poultry vaccinations against Newcastle Disease, PPR, and Pasteurellosis. The lack of proper jetty sites continued to undermine the fisheries sub-sector despite marginal improvements.

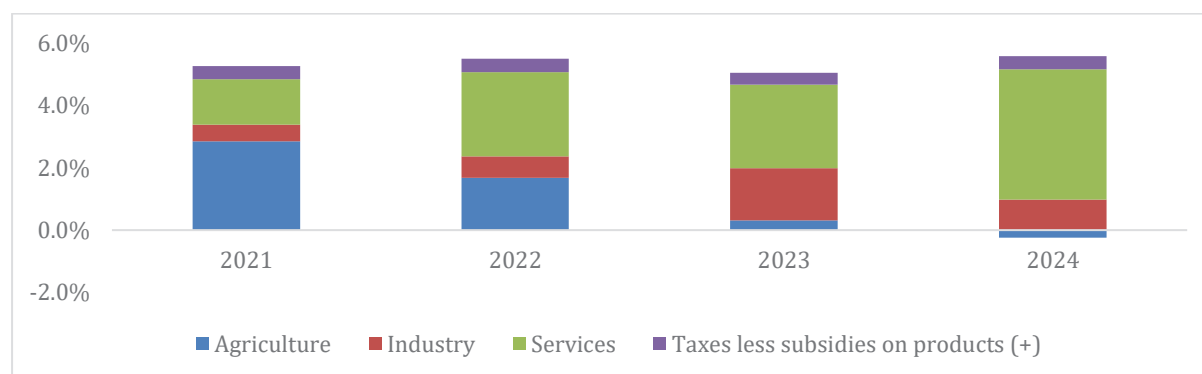
3.1.3 Industry

The industry sector has been driven mainly by construction over the years. The unwavering infrastructure development by the government and increase in remittances have supported both public and private sector construction. The manufacturing industry improved on account of recovery in importing inputs as shipping bottlenecks ease. The electricity subsector is benefitting from increased investment in generation and distribution despite falling short of demand. Growth in the industrial sector averaged 6.1 percent between 2022 and 2024.

3.1.4 Services

The services sector remained the highest contributor to GDP growth over the years, despite being severely affected by the Covid19 pandemic. Growth in the service sector averaged 5.7 percent between 2022 and 2024 due to strong performance in the tourism industry. The strong recovery has been sustained since 2022, supported by several initiatives implemented by the Gambia Tourism Board and the private sector. These include awareness-raising initiatives of various tourism products and services, e-marketing activities, trade exhibitions, and ad hoc marketing. Other subsectors, such as financial and insurance, transport, and wholesale-related activities, recorded notable growth.

Figure 17: Sectors' Contributions to Growth



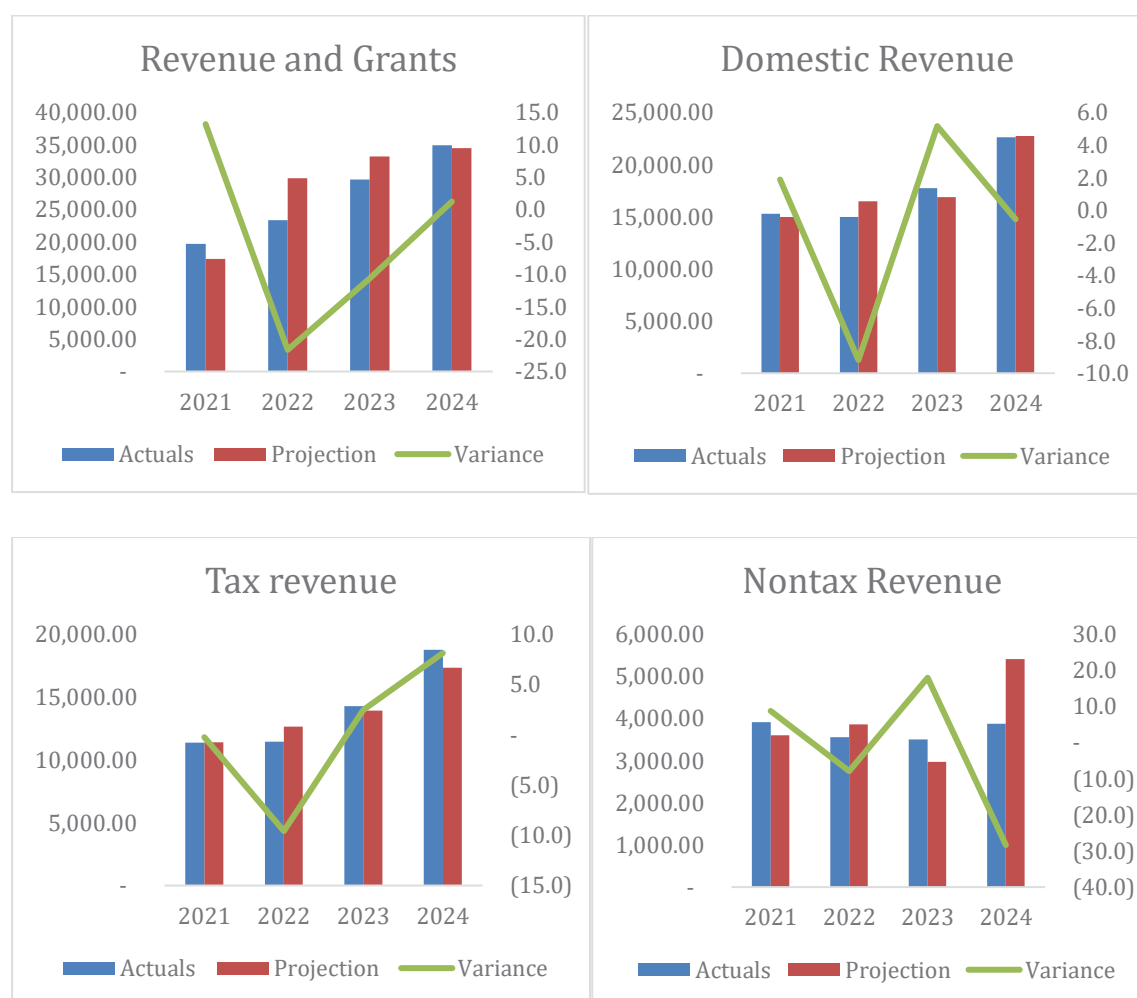
Source: GBoS

3.2 Fiscal Developments

3.2.1 Revenue and Grants

The government embarked on reforms to enhance domestic revenue performance. Consequently, the recovery in revenue collection in 2022 was strong, although overstated in the budget. This was attributed to a shortfall in tax collection and budget support. However, revenue and grants performance has been significant since 2023. This was due to the successful implementation of ASYCUDA World and an enhanced version of GAMDAXNET in all tax offices. The continued growth reflects effective implementation of reforms aimed at enhancing domestic resource mobilisation, reducing reliance on revenue generated from international trade and mitigating the impact of revenue vulnerability to exogenous shocks.

Figure 18: Revenue and Grants



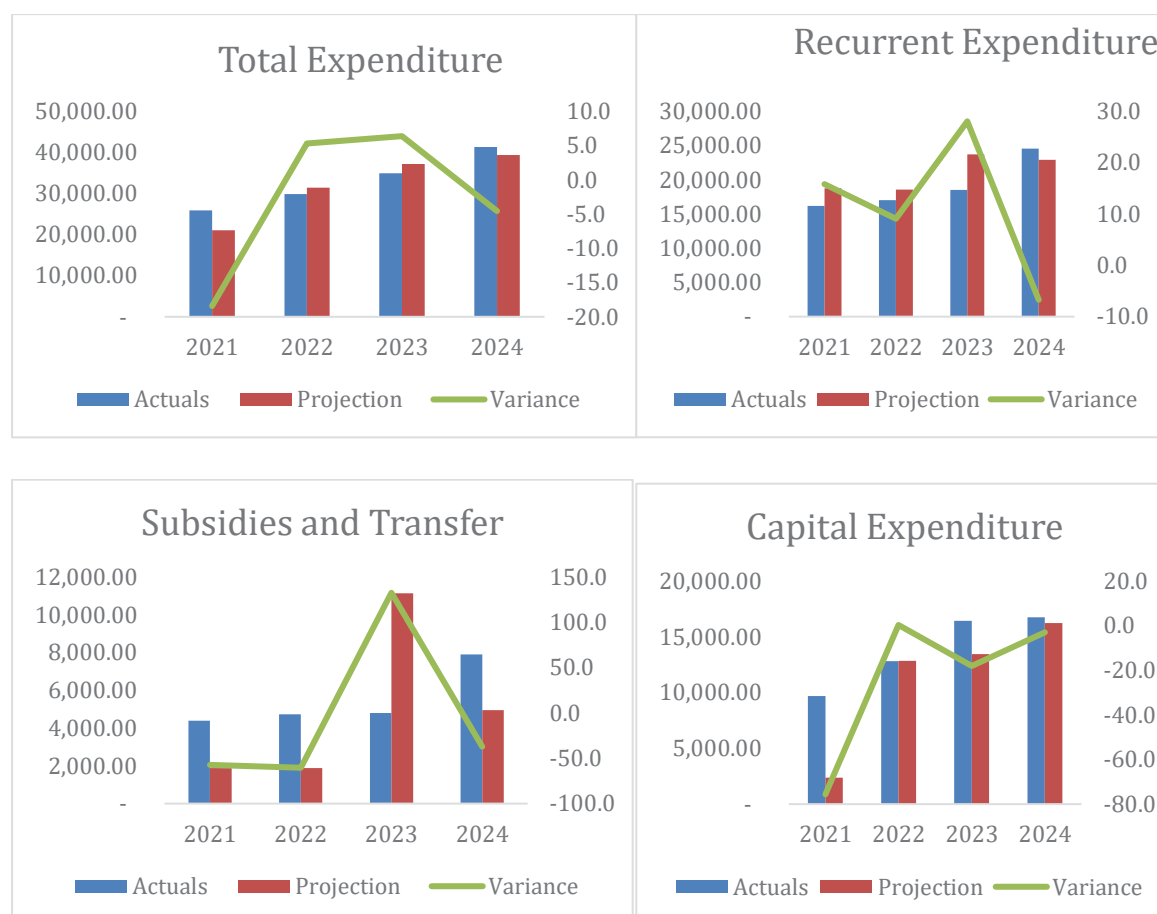
Source: MoFEA



3.2.2 Expenditure

Total expenditure (as a percentage of GDP) averages D35.3 billion compared to a decade-average of D27.7 billion. Expenditure showed an upward trajectory in the period under review. This was driven mainly by new infrastructure-related projects such as the widening of the Bertil Harding Highway and the 50 KM Urban Roads project in preparation for the Organisation of Islamic Cooperation (OIC) summit. Despite the overall budget being on target over the years, overruns were experienced in 2022 and 2023. This was due to unplanned spending pressures from the logistical costs of hosting the OIC summit, the full impact of wage increases effected in 2022, the support to the electricity sector, and accelerated spending on road construction. However, the overruns were contained through expenditure reprioritisation.

Figure 19: Expenditure

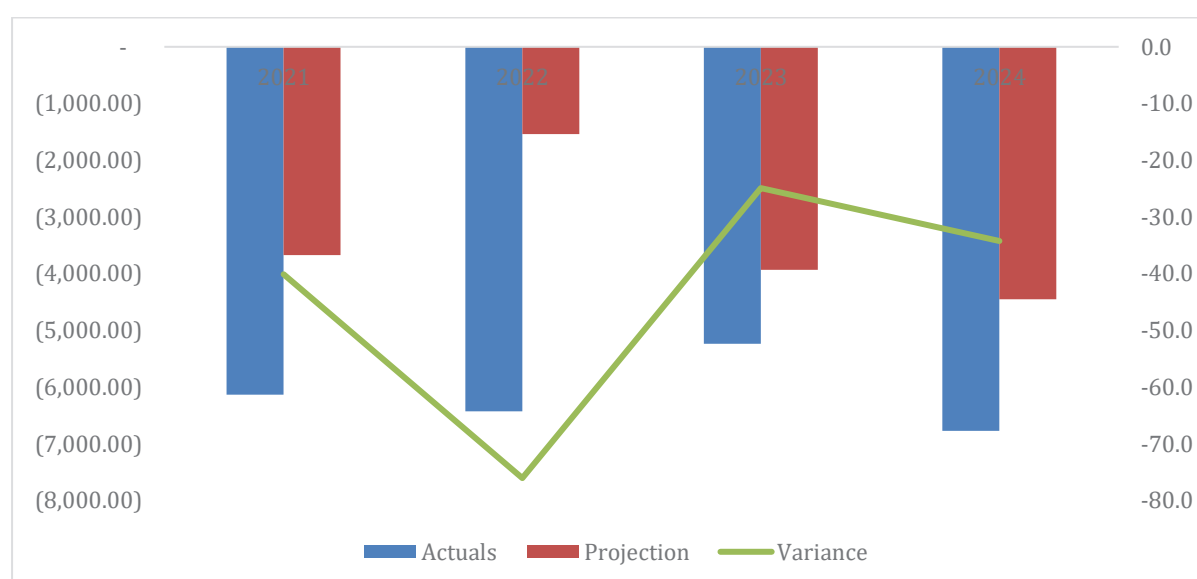


Source: MoFEA

3.2.3 Overall Budget Balance and Financing

The fiscal consolidation efforts by the government improved, albeit with some challenges. These include underperformance in revenue and grants; unbudgeted expenditures related to one-off events (such as the OIC Summit Road infrastructure and NAWEC transfers). The deficit was partially financed by the sale of Megabank and higher-than-expected foreign borrowing.

Figure 20: Overall Budget Balance

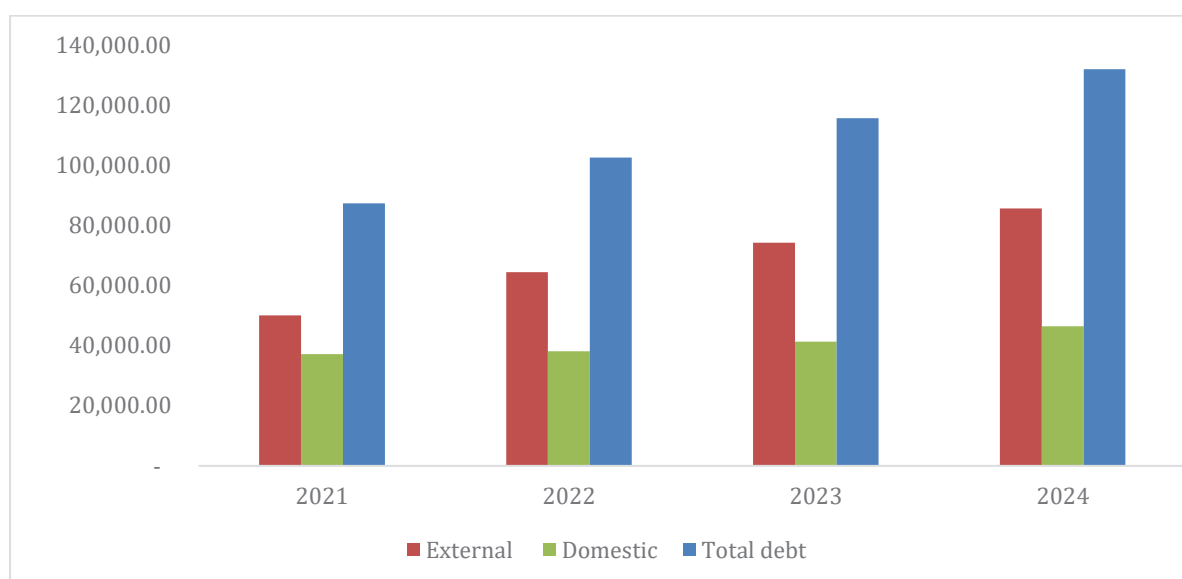


Source: MoFEA

3.2.4 Public Debt

The public debt stock remains high but sustainable, with a total debt of D129.5 billion (USD 1.85 billion) in 2024, up from D110.7 billion (USD 1.74 billion) in 2023. The public debt-to-GDP ratio began to decline in 2023, down from 84 percent in 2022 to 75.6 percent in 2023. However, due to exchange rate depreciation and additional stock accumulation in 2024, this trend has been reversed. The government has employed measures to achieve debt sustainability through borrowing at highly concessional terms, reducing the fiscal deficit and annual borrowing ceiling.



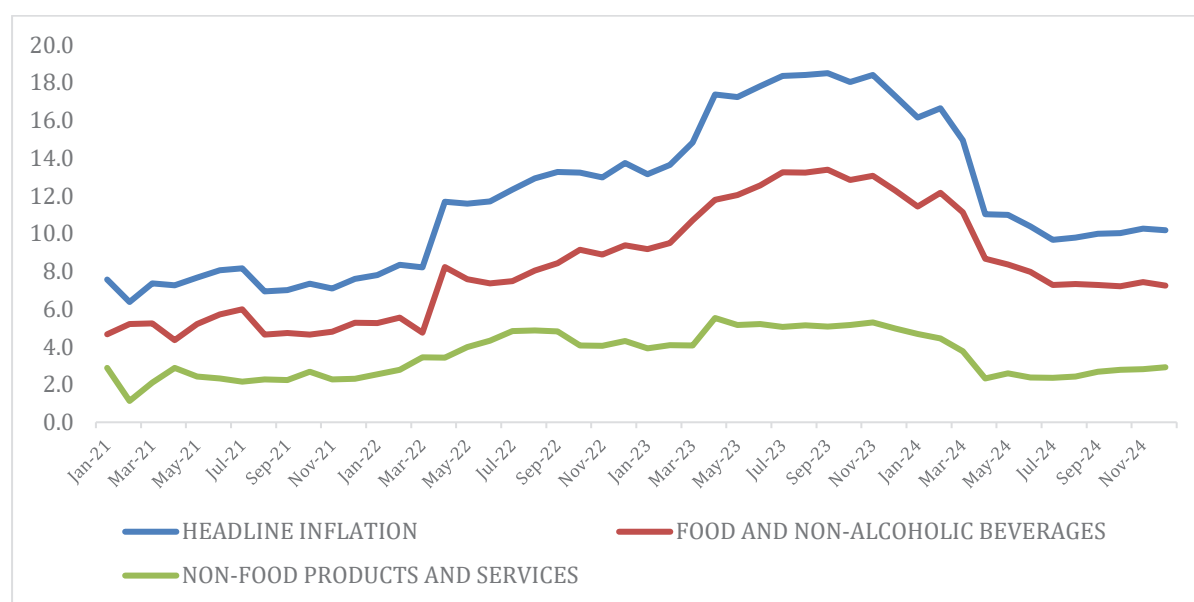
Figure 21: Profile of Public Debt

Source: MoFEA

3.3 Monetary Developments

3.3.1 Inflation

Headline inflation was relatively stable in 2022, averaging 11.2 percent. However, it remained persistently elevated in 2023, averaging 16.9 percent. This was attributed to exchange rate depreciation and rising global food prices. The inflationary pressures decelerated in 2024, averaging 11.7 percent. This was due to monetary tightening, declining global commodity prices, and stabilising exchange rate. Both food and non-food inflation decelerated from an average of 22.2 percent and 10.9 percent, respectively, in 2023 to 15.5 percent and 7.0 percent, respectively, in 2024.

Figure 22: Monthly Inflation (%)

Source: GBoS

The Monetary Policy Committee (MPC) maintained a tight monetary policy in 2024, despite a slowdown in inflation. The monetary policy rate was held at 17 percent during the MPC meetings in November 2024. This followed a cumulative increase of 700 basis points in March 2022 and August 2023, after which the policy rate was held steady.

Table 5: Monetary policy decisions 2022 - 2024

Meeting Date	Policy Decision	Rate (percent)
Feb-22	Left MPR unchanged	10
May-22	Increase MPR by 1ppts	11
Sep-22	Increase MPR by 1ppts	12
Dec-22	Increase MPR by 1ppts	13
Feb-23	Increase MPR by 1ppts	14
May-23	Increase MPR by 2ppts	16
Aug-23	Increase MPR by 1ppts	17
Nov-23	Left MPR unchanged	17
Feb-24	Left MPR unchanged	17
May-24	Left MPR unchanged	17
Aug-24	Left MPR unchanged	17
Nov-24	Left MPR unchanged	17

Source: CBG

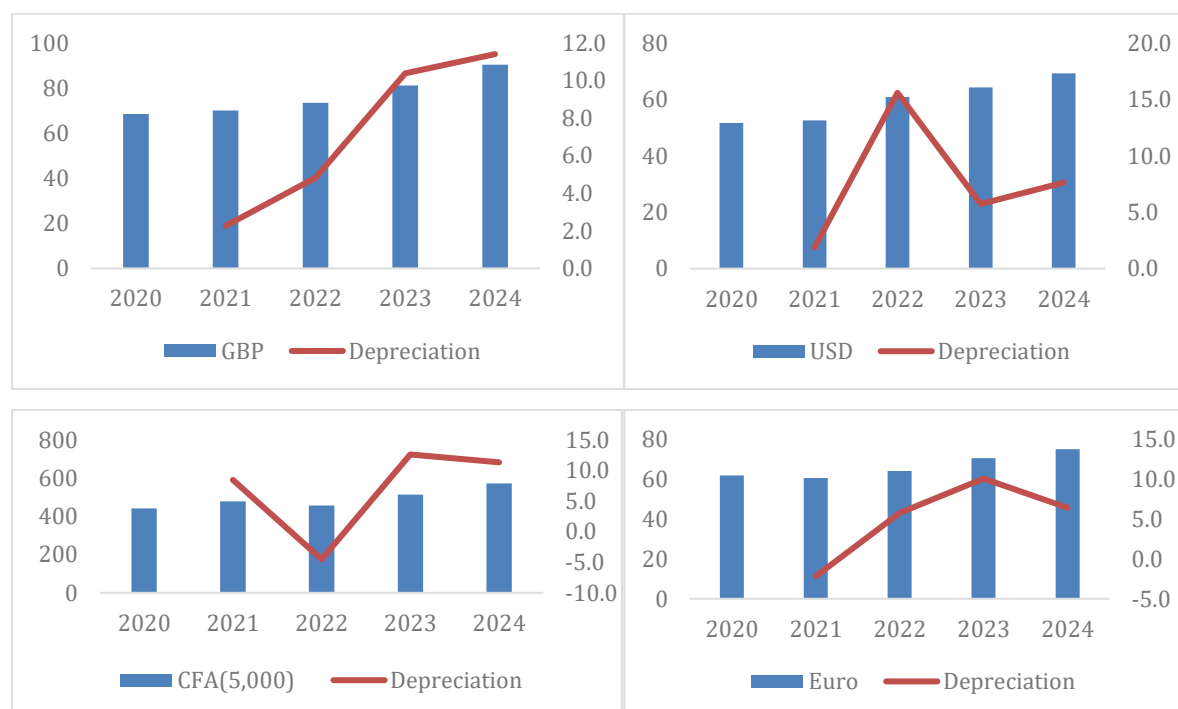
3.3.2 Exchange Rate Development

The foreign exchange rate worsened in 2022 and 2023. This was attributed to the Russia-Ukraine war and sluggish re-export trade. However, the introduction of a new foreign



exchange policy in December 2023 has somewhat eased forex market pressures. This allows the exchange rate to reflect market forces more closely. As a result, the depreciation against major currencies continued in 2024, though at a slower pace. The wedge with the parallel exchange rate narrowed to around 3 percent, compared to a pick-up of above 10.0 percent in mid-2023.

Figure 23: Exchange Rate Development (2020 - 2024)



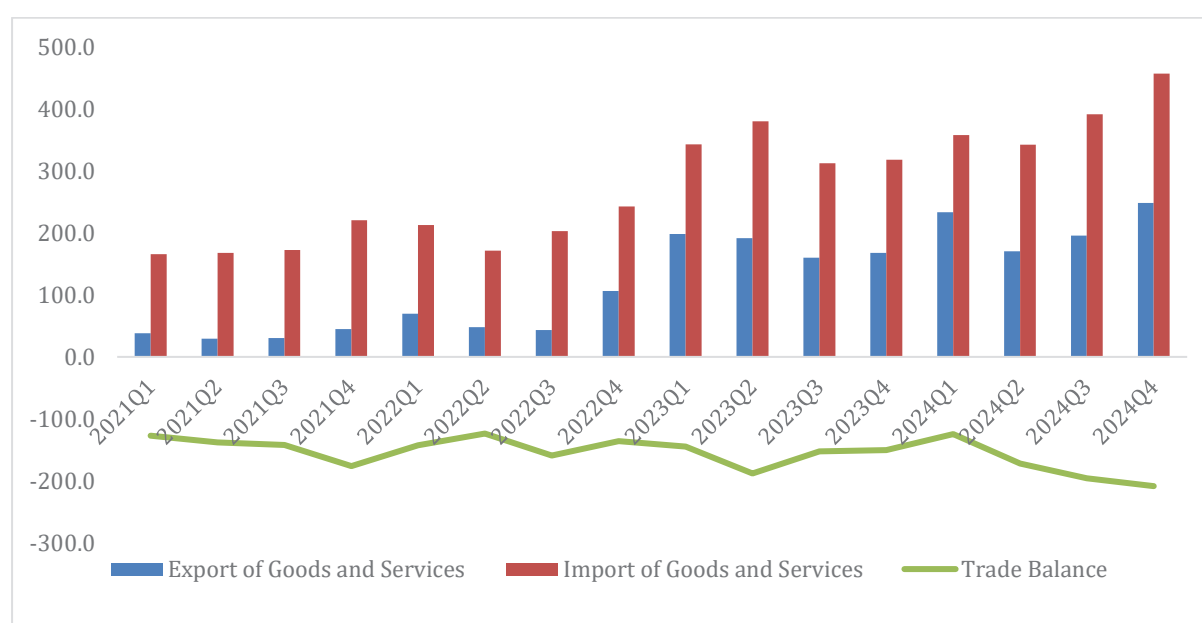
Source: CBG

3.4 External Sector Development

The recovery of the external sector was disrupted by the Russia-Ukraine war in 2022. This led to a growing current account deficit and fluctuating financial flows. Despite strong remittance inflows and a slight pick-up in tourism activity, the trade deficit continued to exert pressure on the current account. These shocks persisted in 2023, which caused the deficit to widen. The widening deficit was driven by fuel and food-related imports. However, the pressures have somewhat eased in 2024 compared to 2023. The current account deficit improved to US\$ 103.9 in 2024 (4.4 percent of GDP) from US\$ 120.1 (5.2 percent of GDP) in 2023. This was associated with recovery in the tourism sector. The goods account balance widened to an estimated deficit of US\$1025.0 million (44.6 percent of GDP) in 2024, from US\$591.6 million (29.0 percent of GDP) in 2022. The worsening of the

deficit in the goods account is mainly reflected in an increase in imports. The services account balance is estimated to have registered a surplus of US\$314.2 million in 2024, from US\$25.6 million in 2022. The growth was largely attributed to the rise in travel income, which recovered somewhat after a near collapse in tourism receipts in 2021. Overall, the deficit in the current account averaged 5 percent of GDP between 2022 and 2024. The Gambia remains among the group of ECOWAS countries with a CAD exceeding 5 percent of GDP, although it remained in single digits in 2024.

Figure 24: Current Account Balance



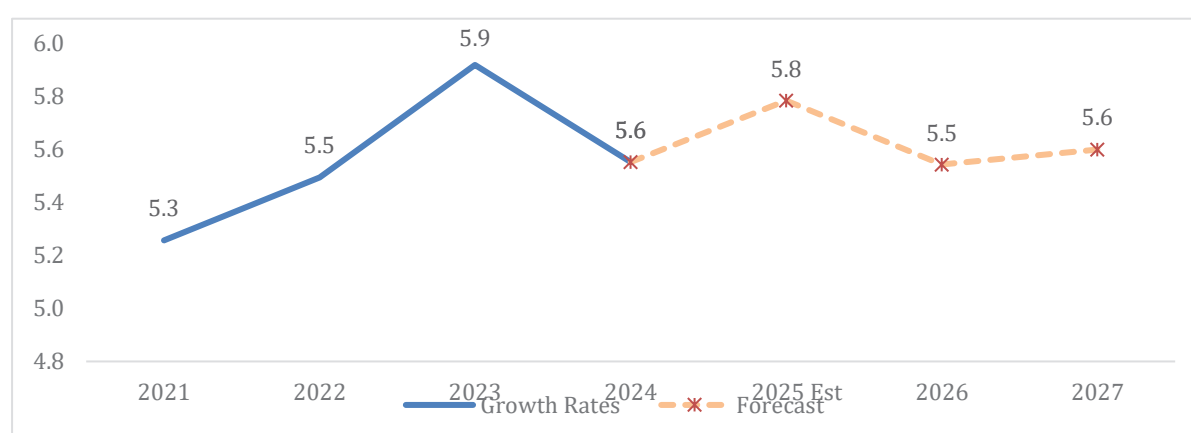
Source: CBG



4. MACROECONOMIC PERFORMANCE AND OUTLOOK (2025–2027)

The Gambian economy is projected to sustain moderate growth through 2027. The Ministry of Finance and Economic Affairs, through its Medium Term Economic Fiscal Framework, estimates real GDP growth of 5.9 percent, 5.5 percent and 5.0 percent in 2025, 2026, and 2027, respectively. The growth will be driven by ongoing projects in agriculture, tourism and communications, and continued stabilisation of inflation and the exchange rate.

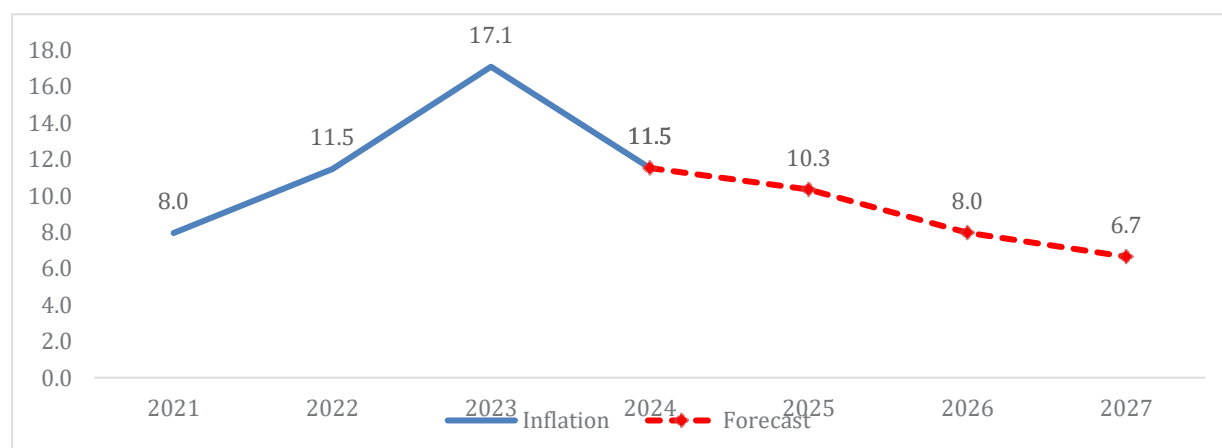
Figure 25: GDP Growth Outlook



Source: MoFEA, MTEFF 2025

Inflation is expected to fall from an average of 11.5 percent (2024) to a near single-digit average of 10.3 percent in 2025, then taper to 6.7 percent by 2027. This assumes the absence of any shock and the maintenance of a tight monetary policy stance.

Figure 26: Inflation Outlook



Source: MoFEA, MTEFF 2025

The government's fiscal consolidation strategy emphasises stronger domestic revenue collection and expenditure reprioritisation. The overall fiscal balance is projected to improve from -4.2 percent of GDP in 2024 to about -1.5 percent of GDP in 2025, and near zero by 2027. Public debt is expected to decline steadily from 81.0 percent of GDP in 2024 to about 63.0 percent by 2027 under current policies.

The external current account is expected to remain in deficit but manageable. In 2024, the current account improved to a deficit of about 2.9 percent of GDP (from 5.2 percent in 2023), thanks to stronger tourism receipts, higher remittances, and some slowing of imports. If global conditions stay stable, service exports (tourism) and remittances are expected to continue offsetting the large merchandise trade deficit. Reserves have climbed modestly, aided by donor inflows and diaspora remittances. Overall, the medium-term outlook assumes moderate global growth and falling commodity prices; any notable deviation (higher oil/food prices, renewed exchange volatility) can disrupt this expectation.

4.1 Key Risk Factors

USAID aid cuts

In early 2025, USAID suspended most of its programmes in The Gambia. This organisation has been a vital support system for many Gambian development projects, particularly in health, education, and justice sectors. A significant portion of USAID funding is directed toward health initiatives, including the treatment and prevention of HIV/AIDS, maternal and child health programs, and support for universal health initiatives under the Gambia National Health Policy (2021-2030). Additionally, some preventive programmes focusing on malaria control and improving water sanitation and hygiene (WASH) are also at risk due to this suspension.

The halt in activities threatens to disrupt transitional justice programmes and civic initiatives. USAID-funded civil society projects that assisted exiled Gambians in obtaining ID cards and participating in the Truth and Reconciliation process have been put on hold. Larger infrastructure grants have also been impacted; notably, the U.S. Millennium



Challenge Threshold Programme, a \$25 million project aimed at electricity reform, was paused as a direct result of this decision.

In November 2021, Gambia signed a commitment for about 1.3 percent of its GDP out of a threshold of approximately \$300 million (around 15.0 percent of GDP) for a four-year initiative. The overall suspension of aid could slow economic growth by removing planned financing for roads, energy, and social programs. The reduction of USAID support may lead to job losses in NGOs and related sectors, erosion of social services, and compel the government to either absorb costs or postpone projects. These consequences could weaken short-term growth and hinder human capital development.

In macroeconomic terms, significant donor-contracted spending would be delayed, affecting other sectors of the economy, particularly posing serious risks in the health sector, especially for the prevention of HIV/AIDS and malaria control.

US tariff hikes

The continued threat of the US new import tariffs (including on EU and Chinese goods) risks sparking a global trade war. According to the GBoS Q1 2025 Merchandise Trade Report for 2024, the United States is not among The Gambia's top ten export destinations, which together account for 97.1 percent of total exports in 2024. With exports representing about 15.0 percent of GDP, and less than 0.5 percent of GDP linked to US exports, the direct impact of the US tariff increase on The Gambia's external sector is negligible. This means that, at the macroeconomic level, the tariff does not significantly alter trade balances or growth projections.

The indirect effects, however, are more pronounced. The cement shortage and price surge in The Gambia during 2025 were partly linked to global market disruptions triggered by US tariffs. Jah Oil's CEO explained that when the US imposed tariffs on Vietnam, American buyers shifted to Egypt and Turkey, countries that also supply The Gambia. This diversion raised global cement prices, contributing to sharp increases domestically, with bags selling for D470–D500 compared to D370–D380 before the policy shift. Given that construction contributes about 12.0 percent to GDP, the cement price shock has ripple

effects across employment, infrastructure projects, and household construction, amplifying the indirect risks of the US tariff increase.

Withdrawal of Alliance of Sahel States (AES) from ECOWAS

In January 2024, the military governments of Burkina Faso, Mali, and Niger announced their withdrawal from the Economic Community of West African States (ECOWAS). These three countries represent a significant portion of both ECOWAS's landmass and population. Although The Gambia does not share a border with them, their exit puts a strain on regional integration. A breakup of the common market and free movement area may disrupt trade corridors in the region. Additionally, political fragmentation increases regional insecurity, as joint security efforts by ECOWAS diminish. This situation could result in governments allocating more resources to defence rather than development.

Overall, the crisis within ECOWAS introduces geopolitical and economic uncertainty, which could impede regional growth and hinder cross-border projects.

On the economic front, The Gambia's trade within ECOWAS in 2024 is heavily focused on Senegal, Nigeria, and Côte d'Ivoire, which together account for about 94 percent of its intra-ECOWAS trade. This indicates strong regional ties with these economies. In contrast, the AES countries contribute less than 1.0 percent to The Gambia's intra-ECOWAS trade, reflecting minimal import volumes and suggesting limited trade integration with The Gambia.

4.2 Policy Recommendations

To manage these risks and harness opportunities, the government should pursue a balanced mix of macroeconomic and structural policies:

- **Fiscal and financial measures**

Continue fiscal consolidation by broadening the tax base and rationalising expenditures. Protect critical social and infrastructure spending (e.g. on health, education, roads) while trimming non-essential outlays. Build foreign-exchange reserves during boom periods to buffer against import shocks. Introduce targeted subsidies or cash transfers to shield the poorest from fuel/food price spikes.



Maintain prudent debt management: favour concessional borrowing and avoid large short-term debt issuance to keep debt/GDP on a downward path. Explore innovative financing (e.g., diaspora bonds, green bonds) as envisaged in the RF-NDP to diversify funding and support climate adaptation.

- Monetary and exchange-rate policy

The Central Bank should keep policy rates in line with inflation risks, as it has in 2024, to anchor inflation expectations. A market-driven flexible exchange rate should be maintained to absorb external shocks, supported by sufficient reserves. Strengthen financial supervision to ensure credit flows to productive sectors, especially agriculture and SMEs, to remain sound. Consider tools like hedging facilities to mitigate volatility in fuel and commodity prices affecting the import bill.

- Structural reforms

Expedite reforms that raise competitiveness and productivity. Improve the business environment by streamlining regulations and reducing bureaucracy, as recommended by IMF and RF-NDP, to attract FDI and private investment. Continue reforming state-owned enterprises, like NAWEC, to improve efficiency and attract private capital. Develop value chains in agriculture to reduce import dependence and earn foreign exchange. Invest in climate-resilient agriculture like drought-resistant crops and disaster risk reduction, as outlined in the National Development Plan, to cushion the impact of weather shocks. Scale up renewable energy (solar, wind) to cut energy import bills and stabilise electricity supply, in line with NDP energy strategies.

- Development planning and partnerships

Align the Medium-Term Expenditure Framework and budget with RF-NDP priorities (health, education, infrastructure, climate) to ensure coherent investments. Seek to replace lost bilateral aid (e.g. USAID) by cultivating alternative development partners. Strengthen social safety nets like expanded social welfare programmes to protect vulnerable groups from economic shocks and inflation. Enhance data and risk monitoring (as RF-NDP urges) to improve early warning for climate and

economic shocks. Finally, work actively within ECOWAS and the African Union to preserve regional stability and trade ties.

By tightening policy frameworks while investing in resilience and diversification, The Gambia can mitigate downside risks and leverage its strong tourism, remittance inflows, and young workforce to sustain inclusive growth.



5. ANALYSES THE STATE OF FOOD INSECURITY IN THE GAMBIA FROM 2015 TO 2025

5.1 The State of Food Security in the Gambia

Food insecurity in The Gambia has remained a significant national concern between 2022 and 2024, characterised by structural production deficits, rising food prices, and recurring seasonal vulnerabilities. National assessments indicate that food insecurity increased sharply in recent years, rising from approximately 8.0 percent in 2016 to between 26.0 percent and 29.0 percent by 2022–2023, reflecting growing pressure on household livelihoods. According to the National Food Security Survey and Harmonised Framework analysis, a substantial proportion of households continued to experience moderate to severe food insecurity during this period. In 2024, although there was a slight improvement with food insecurity declining to about 24.0 percent of households, vulnerabilities remained widespread, particularly in rural areas. Agricultural production improved, with cereal output increasing by approximately 20.0 percent compared to 2023, yet this remained insufficient to meet national consumption needs, as the country continues to produce only about half of its food requirements. As a result, reliance on imports, especially rice, continues to expose the country to global market shocks and exchange rate pressures.

The lean season (June to August) remains the most critical period for food insecurity. Projections indicate that approximately 244,000 people (about 10% of the total population) are expected to face food crisis conditions during the lean season, with 236,000 classified under Phase 3 (Crisis) and about 8,000 under Phase 4 (Emergency) of the Harmonised Framework. Four out of the eight regions; Mansakonko, Kuntaur, Janjanbureh, and Basse are identified as the most affected, facing crisis-level food insecurity. Contributing factors between 2022 and 2024 include soaring food prices, which limited 39% of households' ability to access nutritious food, inadequate household food stocks, with 45% of households reporting no food reserves; and climate-related shocks such as floods, windstorms, and crop failures affecting about 15.0 percent of the population. Additionally, gaps in access to essential services including healthcare (4.0 percent), safe drinking water (10.0 percent), and adequate shelter (7.0 percent) have

compounded nutritional vulnerability. These trends indicate that despite some improvements in production and slight reductions in overall food insecurity in 2024, structural vulnerabilities, inflationary pressures, and seasonal shocks continue to drive recurrent food crises across the country.

Table 6: Gambia Budget Allocation to Agriculture From 2022 To 2024

Year	Amount' GMD Million	% Share
2022	634.84	2.4
2023	722.86	2.5
2024	844.81	2.9

Source: MoFEA

The analysis in Table 6 indicates that budget allocation to the agriculture sector has been steadily increasing from 2022 to 2024. In 2023, the allocation was D722.86 million, which increased to D844.81 million in 2024, which is approximately a 17.0 percent increase. Despite the increase, the allocation for the agriculture sector remains less than 3.0 percent of the national budget from 2022 to 2024, which consistently falls below the 10.0 percent target of the Malabo Declaration for agricultural investment by African Union member states. The gap between The Gambia's CAADP commitments and its actual performance still represents a challenge in attaining sustainable food security and agricultural transformation. Although commitments to attain agricultural and food security targets are enshrined in the Malabo Declaration, public investments in agriculture are still lower compared to the recommended 10.0 percent public sector investment plan. This shortfall not only affects attaining food security but also limits the ability of agriculture to attain broader development objectives. To address these challenges, agricultural finance, institutional capacities, and public-private partnerships must be enhanced in The Gambia. Without enhanced public sector investment, the transformative role of CAADP may not be realised.



5.2 Review of Maputo, Malabo and Kampala Declaration and Commitments

5.2.1 Maputo Declaration (2003)

African Union states adopted the Maputo Declaration (2003) under the New Partnership for Africa's Development (NEPAD). The declaration seeks member countries to dedicate a minimum of 10 percent of their budget to agriculture and 6 percent annual growth in rural development. In The Gambia, budget allocations to the agricultural sector persistently failed to meet the 10 percent target during the 2010s and continued into the 2020s. The International Budget Partnership (2022) noted that the agriculture sector obtained below-target allocations and experienced poor expenditure performance. As a result of frequent delays, limited planning capacity, and administrative inefficiencies, funds were mismanaged. This underinvestment hinders advancement in irrigation infrastructure, productivity and resilience to climate change. This makes the sector highly susceptible to climatic and market shocks, undermining the Maputo commitment to sustained agricultural growth.

5.2.2 Malabo Declaration (2014)

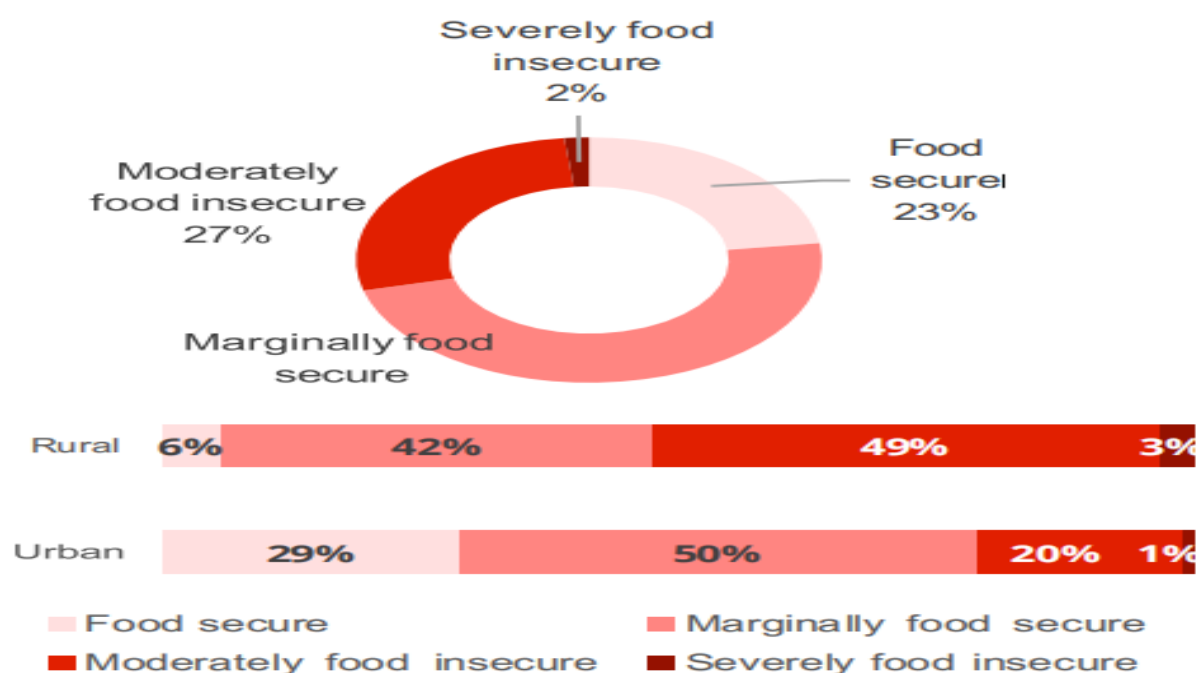
In 2014 the African Union renewed and expanded the Maputo commitments to a new declaration called the Malabo Declaration. The main aim of this declaration is to accelerate agricultural growth, hunger reduction, poverty alleviation, and intra-African agricultural trade by 2025. The Gambia sets its policies consistent with these goals through the second-generation Gambia National Agricultural Investment Plan (GNAIP II), implemented from 2019 to 2026 Regional Strategic Analysis and Knowledge Support System (ReSAKSS, 2023). The focus of this strategy is to enable self-sufficiency in rice production, climate adaptation and value chain development. Support from global partners like the Global Agriculture and Food Security Program (GAFSP, 2023) financed climate-smart agriculture, seed systems, and extension services. However, there have been mixed results. Smallholder productivity and the level of Nutrition have experienced marginal increase; this is due to repeated shocks like COVID-19, the 2022 floods, and rising global food prices that have afflicted the country. Other factors that have slowed implementation of the declaration in The Gambia are the limited institutional coordination and weak public financing (ReSAKSS, 2023; World Bank, 2024). Figure 27, sourced from The Gambia

National Food Security Survey (GNFSS) Report (2023) shows that 29.0 percent of households are food insecure, indicating a 3 percent increase from 2022 to 2023. The Local Government Areas (LGAs) that experience the highest food insecure household includes Basse, Janjanbureh and Kuntaur, representing 41.0, 44.0, and 61.0 percent, respectively. The LGAs with lower prevalence of food insecurity are Kanifing, Brikama, and Banjul, representing 18.0, 25.0, and 27.0 percent, respectively.

5.2.3 Kampala / CAADP 2026–2035 (Kampala Declaration)

In 2025, the African Union launched the Kampala Declaration, which marks the next phase of the comprehensive Africa Agriculture Development Programme (CAADP, 2026–2035). In this declaration, the union sets a new framework for agricultural transformation across African countries. It calls for stronger private sector participation, greater domestic resource mobilisation, and deeper value addition while prioritising youth employment, intra-African trade and resilience. Under the Kampala framework, The Gambia is obliged to enhance policy implementation and strengthen fiscal commitment. This requires the country to improve agricultural budget allocation, ensure higher execution rates, and expand private participation in agro-processing and storage (Government of The Gambia, 2019). The Kampala Declaration also aims to focus on the linkage between food security and climate adaptation. To align with these commitments, The Gambia needs to revise its investment priorities under GNAIP II, set measurable indicators for reducing post-harvest losses, and integrate smallholders into regional value chains. Achieving these targets will require sustained political commitment, improved fiscal discipline, and transparent performance monitoring (NEPAD, 2016; African Union, 2025).



Figure 27: Overview of food security in regions in The Gambia

Sourced: The GNFSS Report, (2023)

5.3 The level of implementation in The Gambia

5.3.1 Maputo Declaration (2003)

The Gambia fails to meet the 10.0 percent budget allocation target for agriculture as one of those who signed the Maputo Declaration. Over the past decade the budget allocated to agriculture ranges from 2.0 to 6.0 percent according to International Budget Partnership (2022). The execution and implementation rate of the declaration was further lowered due to poor planning and delayed disbursements. The GNFSS Report (2023) found that about 29.0 percent of Gambians are suffering from food insecurity (more than 729800 people). Food insecurity is predominantly moderate, with only 2.0 percent of the population classified as severely food insecure. As a result, many smallholder-oriented projects were stalled or relied heavily on external grants and loans. The limited investment in irrigation, mechanisation, and research restricted the growth of the agricultural sector below the 6.0 percent annual target set by NEPAD. In short, The Gambia's compliance and adaptation to Maputo remain low, with a lack of sufficient funds and weak institutional execution.

5.3.2 Malabo Declaration (2014)

Under the Malabo declaration, The Gambia enforced and strengthens its policy commitments through the Gambia National Agricultural Investment Plan II (GNAIP II) 2019–2026. This strategic plan outlines the productivity, nutrition, resilience, and trade goals of the Malabo declaration (ReSAKSS, 2023). The outcomes from the Declaration were mixed. On the good side, there were improvements in areas such as nutrition awareness and smallholder inclusion through donor-funded projects such as the GAFSP Climate-Smart Agriculture and Resilience Project (2023). However, Malabo's main goals, such as agricultural financing and intra-African trade, have not been attained in the country. Factors such as, floods, and climate shocks weakened progress. Coordinating and monitoring systems also remain significantly limited, and the country has yet to institutionalise the biennial review process required under Malabo. The percentage of children aged 0-59 months who are underweight decreased by just 0.9 percent from 2015 to 2022, suggesting that the country has a lot to do in terms of improving food security, especially among children. The implementation of the declaration in The Gambia can be rated moderate but insufficient to meet 2025 targets.

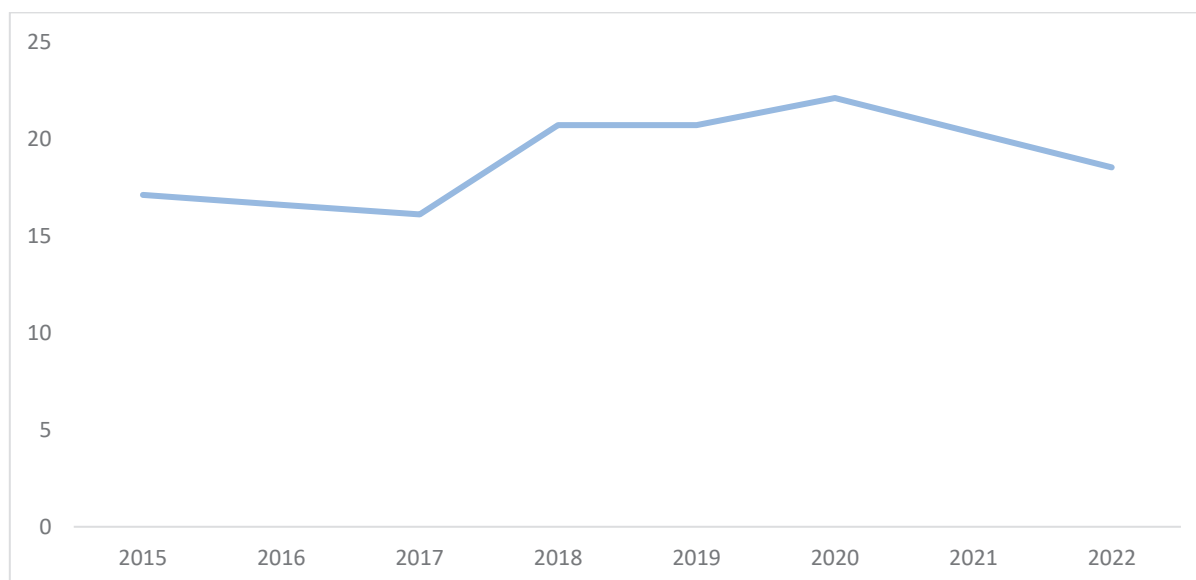
5.3.3 Kampala / CAADP 2026–2035 (Kampala Declaration)

The Kampala Declaration is the new phase of CAADP 2026–2035 and it focuses on private sector investment, mobilisation of finances, and value addition. The Gambia has begun aligning its national policies to this agenda since its launch in 2025 but remains in the early implementation stage. The government has expressed intent to attract private investment into processing, fisheries, and storage, but policy frameworks are still under development. The Ministry of Agriculture and the Ministry of Trade are working on integrating Kampala priorities into the upcoming *National Agricultural Transformation Programme (2026–2035)*. The main challenges include weak domestic resource mobilisation, limited fiscal space and the need for better coordination between government and private actors. In Figure 28 shows the proportion of the country's population that is undernourished between 2015 and 2022 accessed from the Ministry of Agriculture (2022). While the country experienced lower share from 2015 to 2017 indicating improvement in food security during this period, there has been a rise in the



share between 2018 and 2020, which shows a clear deterioration in food access. From 2021 to 2022, the figure shows a slow recovery. The share is still above the 2017 level. The country has not regained earlier progress.

Figure 28: Proportion of undernourished population (% of country's population)



Source: Ministry of Agriculture (2022)

5.4 Why Economic Growth Has Not Translated into Improved Food Security in The Gambia.

Despite economic growth in The Gambia in the past decade, especially between 2015 and 2025, food security conditions increased only slightly. The low productivity in the agricultural sector creates high levels of food import dependence and hinders domestic food production. While the economy recorded moderate growth in sectors such as services and trade, over 70 percent of the population is still dependent on the agriculture sector for their income source (FAO, 2023; World Bank, 2024). Low output levels in the agricultural sector impede rural income expansion and restrict local food production. Yields for staple crops such as rice and groundnuts remain below the regional averages as a result of limited mechanisation, insufficient fertiliser use, and weak farming advisory services (World Bank, 2022).

Insufficient public funding for the agriculture sector hinders advances in food security. African governments, through the Maputo and Malabo Declarations, agreed to allocate a minimum 10 percent of their budgets to agriculture. However, in The Gambia, agricultural

spending remains between 2.0 and 6.0 percent of the national budget. According to the International Budget Partnership (IBP, 2023), the agriculture sector is further facing poor budget execution, slow disbursement of funds, and administrative inefficiencies. These challenges restrict development in irrigation, agricultural innovation, mechanisation, and climate adaptation, needed to increase agricultural output.

In The Gambia, economic growth has not improved food security due to the fact that it largely occurs outside the agriculture sector, while the sector remains constrained by structural weaknesses. The economy's heavy reliance on food imports, notably rice, tends to increase exposure of households to international price shocks. The high dependence on rainfall and low irrigation exposes the agriculture sector to droughts and floods, reducing production and increasing product price instability. Rapid population growth and macroeconomic instability, including currency depreciation and rising inflation, further limit household access to food. In summary, low agricultural investment, poor infrastructure, climate risk, and import dependence limit the ability for the economy to grow through improved food security in The Gambia (FAO, 2023; International Food Policy Research Institute, 2023)

5.5 Food Security Trends and Performance

Food security exists when all people, at all times, have physical and economic access to sufficient, safe, and nutritious food. It is grounded by four core pillars: food availability (supply), food access (affordability/distribution), food utilisation (nutrient absorption), and food stability (consistency of the other three). This sub-section highlights The Gambia's assessment of the pillars of food security mentioned above.

Food Availability

Food availability focuses on the physical existence of food, including production, stock levels, and food aid. Food availability in The Gambia has continued to be structurally challenged, driven by low local supply and high dependence on imported foodstuffs. Currently, the country supplies about 50% of the national food requirements, while the remaining 50% is met through the importation of foodstuffs, such as rice, which is the main staple food consumed by the local population. Although the country experienced an



increase of about 19% in the production of cereals in 2023, this has not translated into bridging the local supply deficit. For instance, the local supply of foodstuffs has continued to be rain-fed, making the output very sensitive to rainfall patterns and climate change effects. During the lean period, the local population has continued to experience a seasonal phenomenon characterised by a reduction in the amount of food available for consumption, a situation that precedes the next harvest season. In spite of the increase in the local supply of foodstuffs, the country has continued to rely on the importation of foodstuffs, making the country susceptible to global supply chain disruptions and price fluctuations.

Table 7: Trends in Yield (Kg/ha) of Major Crops in The Gambia, (2022–2024)

Crop	2022 (Value) Kg/ha	2023 (Value) Kg/ha	2024 (Value) Kg/ha
Cashew	1714	1716.8	1719.6
Cassava	4489	4382.1	4419.6
Groundnuts, excluding shelled	1016.4	1161.2	1022.9
Maize	819.4	806.1	932.4
Millet	748.4	1064.5	1049.6
Rice	994.6	989.8	1054.9
Sorghum	870.5	1014.6	752.4

Source: FAOSTAT, <https://www.fao.org/faostat/en/#data/QCL>

As shown in Table 7, crop yields in The Gambia measured in kilograms per hectare (Kg/ha) exhibited moderate performance during the years 2022 to 2024. The performance of crops during this period can be attributed to rainfall patterns as well as government support through agricultural policies. In 2023, there were improvements in various cereals like groundnuts, millet, and sorghum. This can be attributed also to rainfall patterns and government support in agricultural policies. In 2024, rice and maize yields exhibited improvement. This can likewise be attributed to government support in agricultural

policies. On the other hand, there have been declining yields in groundnuts as well as sorghum. This can be attributed to climate change as well as rising costs. In all the years from 2022 to 2024, cashew nuts have exhibited improvement in production. This can be attributed to diversification in tree crops for export.

Food Access

Food accessibility ensures individuals have the income or resources to acquire food. This is broken down into physical access (infrastructure) and economic access (purchasing power). Food access remains a significant concern, particularly for vulnerable households. According to the 2023 National Food Security Survey, approximately 29% of households were classified as food insecure, though this declined slightly to 24.0 percent in 2024, suggesting modest improvement. However, disparities remain pronounced: food insecurity affects about 52.0 percent of rural households compared to 21.0 percent of urban households, reflecting structural inequalities in income opportunities and market access. Furthermore, projections from international food security assessments indicate a potential 20.6 percent increase in food insecurity in 2024, largely driven by rising rice prices and inflationary pressures. Food inflation has eroded household purchasing power, forcing many families to adopt negative coping mechanisms such as reducing meal frequency or switching to less nutritious foods. This indicates that while food may be physically available in the markets, access remains constrained by poverty, unemployment, and price instability.

Food Utilisation

Food utilisation refers to the body's ability to ingest and metabolise nutrients, which requires safe, nutritious food, clean water, sanitation, and health care. Food utilisation indicators highlight ongoing nutritional challenges, particularly among children and vulnerable populations. According to The Gambia Bureau of Statistics Demographic and Health Survey, about 5.1 percent of children aged 6–59 months suffer from acute malnutrition while 18.3% experience chronic malnutrition. In addition, only 16.5 percent to 31.8 percent of young children meet minimum dietary diversity and acceptable diet standards, indicating insufficient nutrient intake. These figures suggest that beyond food



quantity, diet quality remains inadequate for a significant portion of the population. Poor sanitation, limited access to safe drinking water in some communities, and insufficient healthcare services further affect nutrient absorption and overall health outcomes. Although initiatives such as the national nutrition policy have been introduced as a guideline towards curbing high rate of malnutrition in the country, its rates remain above acceptable thresholds. Thus, utilisation remains one of the most critical dimensions of food insecurity in The Gambia.

Table 8: Trends in Child Stunting and Women's Anaemia in The Gambia (2017–2023)

Year	% of Children < 5 Years who are stunted	% of women with prevalence of anaemia
2017	18.6	49.5
2018	17.6	48.9
2019	16.7	48.1
2020	15.9	47.4
2021	15.2	46.7
2022	14.7	46.3
2023	14.4	46.1

Source: FAOSTAT, <https://www.fao.org/faostat/en/#country/75>

As shown in Table 8, the prevalence of stunting in The Gambia has continued to reduce steadily from 18.6.0 percent in 2017 to 14.4.0 percent in 2023, and anaemia among women of reproductive age also reduced slightly from 49.5 percent to 46.1 percent as nutrition and health continue to improve in The Gambia. This is consistent with improved national nutrition policy and guidelines that have enhanced support for infant feeding, micronutrient deficiency prevention, and community-based nutrition service delivery. The implementation of mandatory food fortification regulations on wheat flour, salt, and vegetable oils also contributed to improved nutrition status and reduced anaemia in The Gambia, even though anaemia reduction is relatively slow compared to improvements in stunting because of its relatively slow implementation. The COVID-19 pandemic and increased food insecurity in 2020 and 2021 have also impacted progress in reducing anaemia and stunting in The Gambia.

Food Stability

Food stability emphasises the resilience of the food system, ensuring that availability, access, and utilisation are not disrupted by economic, environmental, or political shocks. Food stability in The Gambia is challenged by recurring environmental and economic shocks. Over the past decade, food insecurity prevalence has increased significantly from approximately 8.0 percent in 2016 to between 26.0 percent and 29.0 percent by 2022–2023, demonstrating growing vulnerability. The country's heavy reliance on imported staples makes it highly sensitive to global market price spikes and exchange rate fluctuations. Climatic shocks, including irregular rainfall and flooding, further destabilise agricultural output and rural incomes. Seasonal lean periods consistently expose farming households to temporary food shortages. Rising inflation and currency pressures have compounded these vulnerabilities, particularly during global crises affecting food and fuel markets. While emergency food assistance programmes have provided short-term relief, structural instability persists. These trends indicate that although there may be short-term improvements in certain years, long-term stability remains fragile and highly dependent on external conditions.

5.6 Challenges of Food Security to Socio Economic Development in The Gambia

Heavy Dependence on Rain-fed Agriculture

In The Gambia, over 70 percent of citizens rely on agriculture for their livelihoods. The system of farming is mainly seasonal and rain-fed. Unstable rainfall and regular droughts usually lower annual yields and increase the level of vulnerability (World Bank, 2024). This causes low production, a fall in household incomes, deepening of rural poverty, and a rise in food importation. This dependence limits productivity growth and weakens overall economic stability.

Low Agricultural Productivity

The agricultural sector in The Gambia is mainly dominated by subsistence farmers, who use limited inputs, outdated tools, and weak extension services. The use of mechanisation, fertiliser, and irrigation systems remains considerably low. These factors have a persistent negative impact on annual yield and reduce competitiveness. According



to GNAIP II (2019), the result is slow GDP growth, poor export performance, and high unemployment in rural areas.

Rising Food Import Dependence

Half of The Gambia's staple food is imported, especially rice, which makes the economy highly susceptible to global price shocks. Global inflation raises food prices, and the current currency depreciation is contributing to the increasing cost of living and eroding purchasing power (WFP, 2023). This increases urban poverty and leads the country towards an unfavourable balance of payments, thus undermining macroeconomic stability.

Climate Change and Environmental Degradation

Over the past decades, Floods, droughts, and soil degradation have intensified across the country. The most intense and recent flood is the 2022 floods, which destroyed homes, crops and rural infrastructure. Frequent environmental shocks always cause the government to divert its resources toward emergency response rather than invest in sustainable and long-term development. Loss of arable land usually hinders food production and rural employment (African Union, 2025).

Weak Infrastructure and Post-Harvest Losses

ReSAKSS (2023) reports that post-harvest losses exceed 25.0 percent for some crops. This results from poor road networks, lack of cold storage, and weak processing facilities. This reduces marketable yields and income for farmers. Weak infrastructure also causes low private investment and limits regional trade opportunities, hence reducing overall economic diversification.

Inadequate Financing and Institutional Weakness

According to the International Budget Partnership (2022), agriculture receives less than 10 percent of the national budget, far below the Maputo target. High interest rates and limited access to credit mostly prevent farmers from adopting improved technologies. Poor institutional quality and poor coordination between ministries further hinder project implementation. These weaknesses constrain job creation and rural development.

Youth Unemployment and Migration

Limited opportunities in agriculture and low returns push rural youth to migrate to urban areas or abroad. This causes a fall in the active farming population and increases dependency ratios in rural households. The loss of young labour also affects innovation and productivity in the sector (NEPAD, 2016).

5.7 Challenges of Food Security to the ECOWAS Regional Integration Efforts

The structural and cyclical impacts of food security in The Gambia deepen as years pass. These impacts limit the country's progress toward sustainable agricultural growth and stable food supply. For the structural challenge, agriculture is still highly dependent on rainfed farming and arable land. Food and Agriculture Organisation (FAO, 2023) shows that irrigated land is less than 5.0 percent of the cultivated land, making a large amount of agricultural production dependent on rainfall, which is characterised by variability and frequent dry spells. Low productivity further worsens this situation due to dependence on traditional tools, limited adoption of improved seed varieties and limited fertiliser use. Thus, the yields from key crops like rice and groundnuts remain well below regional averages (World Bank, 2022).

Weak infrastructure is one of the factors that affect food insecurity in the region. International Fund for Agricultural Development (IFAD, 2021) suggests that poor road networks, especially in rural areas and inadequate storage facilities cause high post-harvest losses, reducing the volume of food available in local markets. Farmers suffer from limited access to finance, as commercial banks often view agriculture as a high-risk sector, lowering investment in modern inputs and technology. Furthermore, public spending on agriculture consistently falls below the 10.0 percent Maputo and Malabo target, while the coordination and implementation of agricultural strategies like the Gambia National Agricultural Investment Plan II (2019-2026) remain inconsistent (AUDA-NEPAD, 2021).

Other factors that undermine food security are cyclical. Climate shocks like erratic rainfall patterns, floods, and droughts frequently hinder crop cycles and damage harvests. These weather-related shocks cause food scarcity and high price volatility, especially in rural areas where subsistence farming is prevalent. The country's dependence on imported



food, particularly rice, makes it vulnerable to global price fluctuations. Events like the COVID-19 pandemic and the Russia-Ukraine war triggered price spikes that directly affected domestic food affordability (IMF, 2023).

Economic instability and currency depreciation have also reduced household purchasing power. Rising inflation and higher import bills increase the cost of basic food items, worsening urban and rural poverty (World Bank, 2023). Demographic pressures compound these problems, with population growth exceeding 2.5 percent annually and food demand outpacing domestic production (GBoS, 2022). Health and nutrition challenges also contribute to food insecurity, as malnutrition and recurring disease outbreaks reduce labour productivity and household resilience (UNICEF, 2022).

6. SWOT ANALYSIS OF NATIONAL FOOD SECURITY POLICY AND INSTITUTIONAL FRAMEWORK

The following SWOT analysis evaluates the internal strengths and weaknesses of The Gambia's food security policy and institutional architecture, as well as the external opportunities and threats affecting it. This encompasses broad policy frameworks, coordination capacity, investment strategies, and implementation mechanisms, in line with regional commitments (CAADP/NEPAD) and partner evaluations.

Strengths	Weaknesses
1. Comprehensive Policy Framework: Clear national strategies are in place, one of which is the GNAIP II (2019-2026), which aligns with AU Malabo targets. The policy agenda is well-aligned with regional commitments to end hunger and boost resilience. 2. High political commitment: Food security and agriculture are top development priorities. The new recovery-focused National Development Plan (NDP) (2023-2027) explicitly emphasises the need to reinvigorate the agriculture and natural resources sector to achieve food and nutrition security. 3. Institutional structures in place: The Gambia has established specialised agencies and coordination mechanisms for food security, like the National Nutrition Agency (NaNA) and a Social Protection Secretariat, alongside multi-stakeholder committees. Government and partners coordinate through these bodies to align efforts.	1. Under-investment and funding gaps: Agriculture consistently receives far below the 10.0 percent budget target; only 2.0-5.0 percent of the national budget in recent years is for the agricultural sector, leading to chronic under-financing of extension services, irrigation, and research. This budget shortfall makes programmes heavily dependent on donor funding, and many projects stall without external support. 2. Weak institutional coordination: Overlapping mandates and limited capacity among institutions hinder effective implementation. There are shortcomings in inter-ministerial coordination and monitoring. Policy execution and data systems remain underdeveloped. 3. Low productivity and infrastructure deficits: The predominance of rain-fed, subsistence farming and limited uptake of modern inputs result in low productivity. Yields for major



4. Partner support and programmes: There is strong engagement from development partners and NGOs in bolstering the national effort on food security. This collaboration brings in technical expertise, funding, and innovations to supplement government capacity.	crops are below potential due to scarce mechanisation and irrigation. Additionally, weak rural infrastructure – poor roads, storage, and processing facilities – causes high post-harvest losses. These factors constrain market access and farmers' incomes. 4. High import dependence: Limited domestic food production capacity has led to heavy reliance on food imports, which is a cause of concern. Import dependence reflects structural weaknesses in self-sufficiency and exposes the country to external price shocks, contributing to trade imbalances.
Opportunities	Threats
1. Regional and global initiatives: The Gambia can leverage new international frameworks like the Kampala Declaration (CAADP 2026–2035) for support in agricultural transformation. These initiatives call for greater private-sector investment, intra-African trade, and climate resilience, which align with The Gambia's needs. The Gambia's participation in the African Continental Free Trade Area (AfCFTA) and ECOWAS regional trade scheme also offers opportunities to expand agricultural trade and attract funding for value-chain development. 2. Untapped agricultural potential: There is room to increase production and diversification.	1. Climate change and environmental shocks: Worsening climate hazards pose a serious threat. The country is highly vulnerable to droughts, erratic rainfall, and flooding, as seen in the destructive 2022 floods, which regularly damage crops and infrastructure. Climate change is expected to intensify these events, potentially undermining food production and livelihoods further. Environmental degradation, especially soil salinity around the River Gambia, also threatens arable land. 2. Global market volatility: The Gambia's food security is at risk from international economic fluctuations. Global price spikes for food, fuel, and fertiliser, such as



Opportunities include developing irrigation along the River Gambia, expanding horticulture and aquaculture, and implementing planned land reforms to consolidate viable farm sizes. GNAIP II priorities, like value addition (agro-processing, packaging) and improved market linkages, could boost food availability and rural incomes if realised. The country's youthful population could be mobilised in modern agribusiness with the right training and incentives.

3. **Climate finance and resilience funding:** Growing global focus on climate adaptation and food systems resilience is an opportunity to mobilise external resources. The Gambia can tap into climate funds and donor programmes for climate-smart agriculture, irrigation infrastructure, and disaster risk reduction.
4. **Strengthened regional cooperation:** ECOWAS and African Union peer review mechanisms, like the CAADP Biennial Review, can provide opportunities for knowledge sharing and accountability. The Gambia can learn from best practices in the region and attract South-South cooperation.

those in 2020–2022 due to the COVID-19 pandemic and the Russia-Ukraine War, directly translate into higher domestic prices and import costs

3. **Demographic trends and social change:** Rapid population growth of about 2.5% per year is increasing demand for food faster than domestic supply growth. Additionally, rural-urban migration reduces the agricultural labour force. Without an alternative to engage youth in agriculture, the sector's future productivity and innovation capacity are at risk.



7. CONCLUSION

In conclusion, socio-economic developments in 2024 reflect a period of measured recovery and stabilisation amid persistent domestic and global challenges. The performance of the real sector, coupled with easing inflationary trends and gradual improvements in fiscal and external balances, underscores the effectiveness of recent policy measures. However, structural constraints such as limited fiscal space, exposure to external shocks, and pressures from global economic conditions continue to weigh on long-term economic prospects.

Food security remains a major structural concern. Despite improvements in agricultural output, a significant proportion of households continue to experience food insecurity due to high food prices, low incomes, and dependence on imports. Addressing food security will require sustained investment in domestic agriculture, improved storage and distribution systems, and targeted support for vulnerable households.

To consolidate gains and enhance resilience, policymakers should prioritise strengthening domestic production, improving revenue mobilisation, maintaining price stability, and supporting key growth-enhancing sectors. Additionally, sustained investment in human capital, infrastructure, and institutional capacity will be critical for fostering inclusive growth and improving overall socio-economic outcomes. Continued policy coordination and evidence-based decision-making will remain essential to navigating future uncertainties and achieving sustainable development objectives.

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