HOW AFRICA CAN FEED THE WORLD

2020

FARRELLY & MITCHELL

Food & Agri-Business Specialists

AN INTRODUCTION

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Managing Director

Farrelly & Mitchell is pleased to present **"How Africa Can Feed the World",** a report which focuses on how the African continent can contribute to addressing global food security concerns.

Our extensive advisory experience in the MEASA region gives us a distinct insight into the challenges facing the region's agri-businesses. We have drawn on our hands-on involvement working within the continent, along with published forecasts for Africa and global food security, to generate our perspective on how Africa can positively contribute to solving the world's food security issues.

There are two pertinent facts about current African agriculture: significant progress has been made, and there is potential for so much more. While there is no easy way to solve the complicated problem of feeding the world, this report outlines some actions which, if implemented, would contribute to addressing food security issues by improving food production and distribution in Africa.

As international food and agribusiness specialists, we believe that understanding the regional and global ramifications of food security the world is fundamental in delivering applicable real-world results for our clients.

I would like to thank the contributors for their valuable input. I hope you find it provides useful insights and as always we welcome your feedback.

CONTENTS

1.0

EXECUTIVE SUMMARY

Critical food security issues have been predicted by experts, with the global population expected to rise to over 10 billion people in 2050.

Most notably, from an African perspective, the continent is forecast to become home to 25% of the world's population in 2050, compared with 15% today.

Africa's agricultural potential is huge. The continent has an abundance of unexploited agricultural resources. Sub-Saharan Africa (SSA) alone accounts for almost a half of the world's uncultivated arable land, has a large, growing and underutilised agri-labour force and vast pools of untapped water resources. It has the capacity to significantly alleviate any future production gap.

However, doing so will require:

1. Increasing yields
2. Developing sustainable agriculture via the adoption of new technologies;
3. Reducing food loss and waste upstream in the agri-food value chain;
4. Decreasing regional bureaucracy
5. Adapting to a changing global agricultural trade landscape

This report explores the opportunities that lie within these five objectives.

HOW TO HELP AFRICAN AGRICULTURE

> Increasing yields

> Decreasing regional bureaucracy

> Sustainable agriculture by new technology

> Reducing waste

GLOBAL CHALLENGES

+60%
Demand for food by 2050

+45%
Demand for energy by 2030

+30%
Demand for water for agriculture by 2030

2.0

FOOD SECURITY: WHAT LIES AHEAD

The population of the African continent is growing at more than twice the global average. From now to 2050, eight of the ten countries with the highest average annual population growth rate in the world are expected to be African. By 2055, 18 out of the 20 countries with the highest total fertility will be located in Sub-Saharan Africa (SSA).

All indicators point to colossal population growth in Africa over the next half century, with the continent's population expected to double from around one billion to almost two billion.

A larger population means greater demand for food on the continent, which in turn means more pressure on the world's resources. The main challenge ahead for the food and agribusiness sectors will be ensuring that it can meet this increased demand through sustainable food production.

Africa's food supply is currently made up of a mix of domestic production and imports. While the volume of imports varies by country and by commodity, imports can account for as much as 40% for particular regions and commodities.

Food security is already a significant problem in the region. At present there are over 220 million undernourished people in SSA, with many more living under the threat of food insecurity.

Undernourishment has increased by more than 25% over the last 25 years, with SSA one of the only regions in the world to have experienced a substantial increase over the period.

Figure 1

Undernourished People by Region, 1990–92 and 2014–16 (millions)

REGION	1990-92	2014-16
Developed Regions	20	15
Southern Asia	291	281
Sub-Saharan Africa	176	220
Eastern Asia	295	145
South-Eastern Asia	138	61
Latin America & the Caribbean	66	34
Western Asia	8	19
Northern Africa	6	4
Caucasus & Central Asia	10	6
Oceania	1	1
TOTAL	**1011**	**795**

Source: FAO

3.0

AGRICULTURE IN AFRICA

There are two facts about the current African agricultural landscape: much progress has been made, but there is potential for so much more.

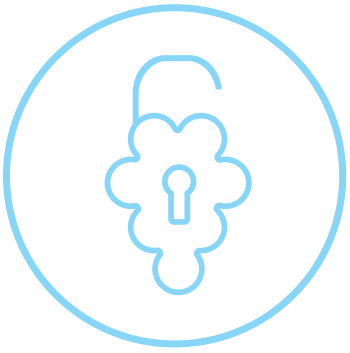
The improvement has been quite remarkable. Eighteen SSA countries have reached the Millennium Development Goal's target of halving the proportion of people who suffer from hunger. Agricultural production has increased 160% over the past 3 decades, significantly more than the global average of 100%. Country-level programmes, cross-border initiatives, and Pan-African groups have all played a significant role in this progress.

Smallholder farmers supply up to 80% of SSA's food production from an estimated 33 million smallholder farms. The crops they farm are often not major cash crops cultivated by large scale agri-enterprises. They tend to be local, underutilised species, mostly legumes and vegetables.

There is significant room for improvement. Africa remains a net importer of food, despite its available arable lands. **The continent's population has doubled over the last 30 years,** with its urban population having increased by 200%. However, its agricultural and food sectors are struggling to keep pace.

4.0

HOW TO HELP AFRICAN AGRICULTURE TO IMPROVE THE CONTINENT'S FOOD SECURITY



Despite its many issues, Africa has the potential to become food self-sufficient and contribute significantly to reducing any potential future gap in global food production.

While there is no simple panacea, we have identified some solutions, which if implemented, could help address future food security issues by improving food production and distribution in Africa.

4.1

CONTINUED EFFORTS IN INCREASING YIELDS

FAO has recently warned that agricultural production must be boosted by at least 50 per cent to keep up with food security concerns. However, many of the world's main agricultural regions are approaching full productivity.

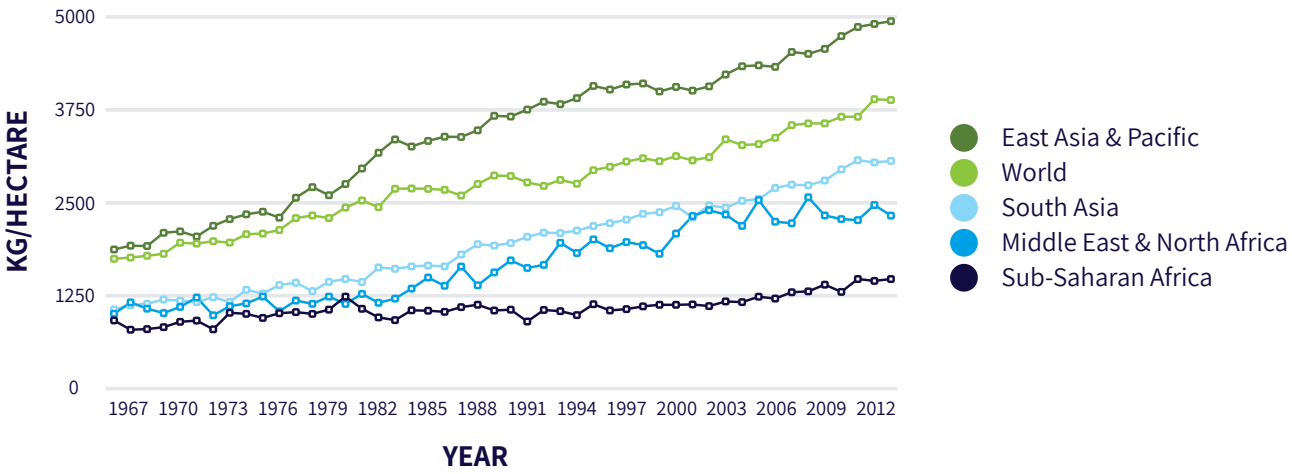
That said, Africa still has the potential to considerably optimise yields with current available technology. **Cereal yields per hectare in Africa only increased by 38% over the period 1967-2013, compared with a global average of 107%.** Cereal yields in certain regions of Africa are still as low as 1.5 tonnes per hectare, compared to yields of 3.65 tonnes per hectare in countries with mid-income economies and 5.8 tonnes per hectare in countries with high-income economies. There is plenty of room for improvement.

Mobilising the various actors in the value chain to work together in a coordinated fashion will be a key success factor. For example, Seed Co., a subsidiary of AICO Africa Limited, assembled the Last Mile Alliance Group at a meeting at Dar Es Salaam, Tanzania in 2012. The group consists of commercial partners (providers of high-quality farm inputs, financial services and insurance), existing agro-dealers, foundations and donors. The aim of the meeting was to explore opportunities for increasing smallholder farmers' access to high quality inputs, and offering business expansion opportunities across remote areas of Tanzania. As a result of this project, Seed Co. is targeting an increase in per hectare yields from 1.1 to 4 tonnes. The adoption of this type of cross sector development model represents a significant opportunity for farmers throughout the region to increase yields, crop quality and incomes.

Increasing yields is also highly related to fostering sustainable agriculture. This is further discussed in the following section.

Figure 2

Cereal Yields (kg/hectare)



Source: World Development Indicators

Table 1

The Ratio of Current Yields to Estimated Potential Yield of Selected Crops

REGION	MAIZE	OIL PALM	SOYBEAN	SUGARCANE
Asia (excluding West Asia)	0.62	0.74	0.47	0.68
Europe	0.81	N/A	0.84	N/A
North Africa and West Asia	0.62	N/A	0.19	0.95
North America	0.89	N/A	0.77	0.72
Oceania	1.02	0.6	1.05	0.91
South America	0.65	0.87	0.67	0.93
Sub-Saharan Africa	0.2	0.32	0.32	0.54

Source: World Bank

4.2

FOSTERING SUSTAINABLE AGRICULTURE VIA ADOPTING NEW TECHNOLOGY

Fostering sustainable agriculture in Africa will require considerable investment in infrastructure, technical training - especially for women who make up the bulk of agri-workers on smallholdings and adoption of new technologies. Challenges such as climate change, the need to diversify food sources and population growth call for the real innovation..

While the initial pace of biotechnology adoption has been quite sluggish, the rapid growth that occurred in the IT sector (e.g. the rapid global penetration of mobile phones) is thought to be on the verge of repeating itself in agricultural biotechnology. This forecast is based on the fact that the capacity to absorb technical knowledge and apply that knowledge to solve local problems among African countries is estimated to grow.

An example of an effort to use agricultural biotechnology to improve agricultural output includes efforts by scientists at Nigeria's Institute for Agricultural Research at Ahmadu Bello University to deal with the impact of pest, Maruca vitrata, on black-eyed pea production. Africa grows about 96 per cent of the approximately 5.4 million tonnes of black eyed peas consumed worldwide annually. In Nigeria, Maruca vitrata destroys circa US$300 million of the crop each year, forcing farmers to import US$500 million worth of pesticide. The scientists at Ahmadu Bello University are developing a transgenic black eyed pea variety using insecticide genes from the Bacillus thuringiensis bacterium.

Another example is the spread of Xanthomonas wilt, a bacterial disease that affects bananas by causing early ripening and discoulouration. The disease is estimated to cost countries in East Africa around US$500 million each year. The problem is especially acute in Uganda. Researchers there and in Kenya have carried out a number of extremely promising field trials aimed at controlling the disease by growing transgenic bananas using genes extracted from sweet pepper (Capsicum annuum). Given the importance of the crop in the region, solving this problem would directly increase food security and income.
Such new discoveries are not the be-all and end-all. To achieve meaningful impact, they must be incorporated into the broader socio-economic systems. All too often, their adoption is restricted by prohibitive regulations (as is the case with regulatory regimes that prohibit the commercialisation of transgenic bananas) and deficiencies in the continent's agricultural innovation systems. For example, little research is done at the universities, which often solely focus on teaching. Rather, most research is carried out at agricultural stations and research centres that lack the required mechanism to transfer knowledge to other parts of the agri-food value chain. Unfortunately, links between these centres and the continent's small farmers are particularly weak.

In order to improve the system, research, academia, education and farm outreach must be connected. Establishing a new generation of agricultural research universities is one way to accomplish this goal. However, such universities must be part of a broader innovation system that incorporates improving synergies between all stakeholders in the agri-food value chain (including governments bodies and NGOs). In order to achieve this goal, one can attach research functions to existing agricultural universities to develop and reinforce their connections to farming communities directly; or attach academic programs to the existing national agricultural research institutions (NARIs). Linking NARIs to farmers in the private sector through extension services and commercialisation projects can help develop agricultural entrepreneurship. The establishment of these types of organisations, with both research and education functions, can also help attract and maximise support from international development agencies and international finance to help scale up agricultural innovation.

Sustainable agriculture is highly dependent on the efficient use of land. Africa has a massive untapped potential in terms of the expansion of cultivated lands.

About 60 percent of Earth's uncultivated land is in Africa, approximately 600 million hectares. Not all of this can be converted into fertile farmland. However, the opportunity for sustainable expansion is there. Table 2 compares unused land suitable for rain-fed cultivation by region. It can be seen that SSA accounts for 45% of the world's available land area. However, over half of this land is more than six hours from the nearest market, suggesting that considerable infrastructural development is required to successfully integrate this land into the agri-food value chain.

60%

of Earth's uncultivated land is in Africa

Table 2

Potential Supply of Suitable Land for Rain Fed Cultivation in Different Regions (thousand ha)

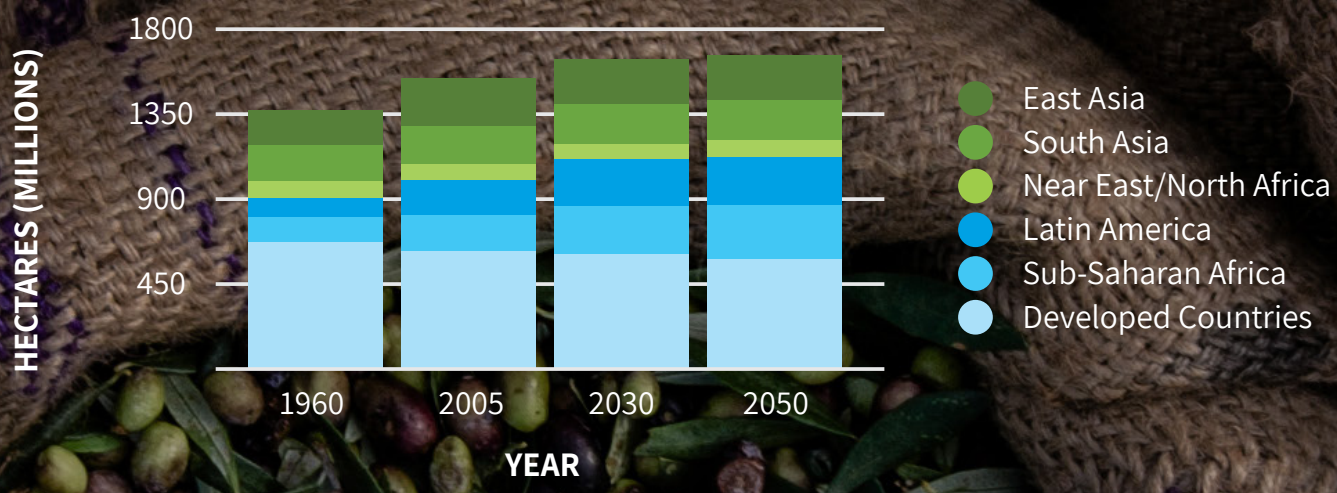
REGION	TOTAL AREA	< 6 HOURS FROM MARKET	> 6 HOURS TO MARKET
Sub-Saharan Africa	201,540	94,919	106,621
Latin America and the Caribbean	123,342	93,957	29,385
Eastern Europe and Central Asia	52,387	43,734	8,653
East and South Asia	14,341	3,320	11,021
Middle East and North Africa	3,043	2,647	396
Rest of world	50,971	24,554	26,417
TOTAL	**445,624**	**263,131**	**182,493**

Source: World Bank

African agricultural output grew by 160% over the past 30 years - far above the global average of 100% - however, the region's strong agri-resource base and low productivity suggest significant untapped potential.

FIGURE 3

Total Arable Land in Use (Historic & Projections)



Source: World agriculture towards 2030/2050: the 2012 revision, FAO

4.3

REDUCING WASTE

The majority of the food required to feed projected demand growth is already being produced. We need to reduce food loss and waste.

The exact figure changes from region to region but approximately 30-35% of all food produced for human consumption is lost or wasted every year. If we were able to save just half of that, we would be able to feed an additional 1.7 billion people.

In medium and high income countries, quality standards with regards to the appearance of the food along with consumers' predisposition to buy more than they need, contribute to massive amounts of waste. On the other hand, most food loss in Africa takes place in the primary production and distribution stages. Appropriate investment in infrastructure, transportation, packaging facilities and agro-processing can help in the fight against food loss in the developing world.

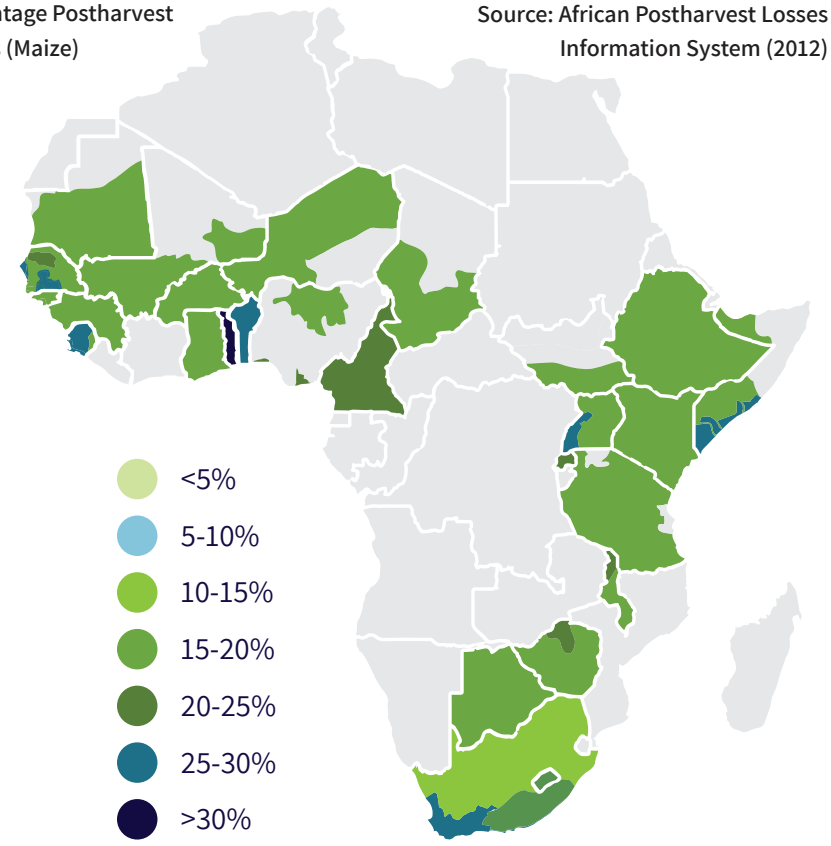
Among the key issues identified by the FAO is a scarcity of silos and unpredictable power supply, highlighting the need for targeted investments along with technological knowledge transfer. The lack of proper storage facilities contributes to the continent losing food worth US$4 billion each year as post-harvest loss. Improving both the quality and quantity of facilities would go a long way to helping Africa become food self-sufficient, and on its way to achieving its potential.

The Dutch Agricultural Development & Trading Co. (DADTCO), a social enterprise pursuing poverty alleviation with business methods, is one company tackling the issue of food loss and waste. Working with cassava farmers in Ghana, Mozambique and Nigeria, DADTCO's Autonomous Mobile Processing Unit (AMPU) processes fresh cassava on or as near farms as possible in order to eliminate losses that happen during transportation and traditional processing. This has considerably decreased food loss in cassava value chains.

Figure 4

Percentage Postharvest Losses (Maize)

Source: African Postharvest Losses Information System (2012)



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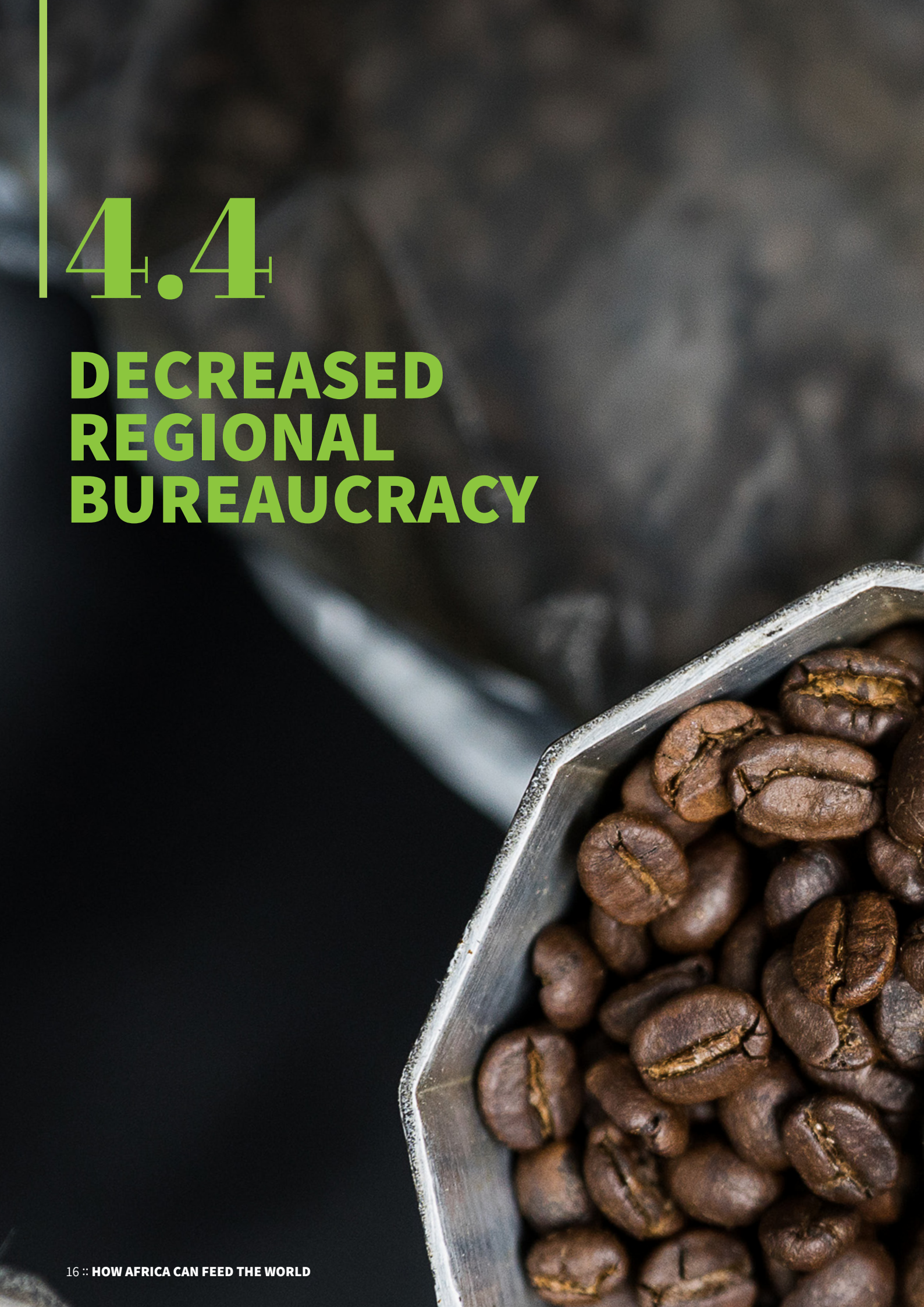
DECREASED REGIONAL BUREAUCRACY



Farmers in Africa could potentially grow enough food to feed the entire population of the continent and prevent future food crises, if African governments can work together to eliminate cross-border restrictions on the food trade both within the region and globally.

Africa's agricultural potential cannot be fully realised because the agri-sector faces more trade barriers in getting their food to market than anywhere else in the world.

There is significant variation in the conclusions reached from research undertaken on the issue of food security. However, a common theme is a call urging African leaders to work toward reducing trade barriers. Doing so will facilitate free movement of food between countries, from fertile areas to those where communities are suffering food shortages.

This issue is becoming more and more urgent as the food demand in Africa intensifies and urbanisation takes hold. As urbanisation increases, rural areas depopulate and the challenge for small farmers to transport their produce to an increasingly dependent consumer base grows. Moreover, improved food trade can also facilitate the better management of the destructive effect of increasing droughts, rising food prices and volatile weather patterns.

If African leaders are willing to support and develop dynamic inter-regional and global trade by enhancing market access, Africa's farmers have the potential to meet rising food demand associated with the continent's population growth and benefit from a major growth opportunity at a global level. Doing so would also create more jobs not only in production but also in distribution and agro-processing, while reducing poverty and cutting back on expensive food imports. However, trade negotiations must be balanced and create win-win outcomes.

4.5

ADAPTATION TO A CHANGING GLOBAL AGRICULTURAL TRADE LANDSCAPE

Agricultural trade has been continuously expanding mainly due to high demand, especially in emerging economies. According to the Food and Agriculture Organization of the United Nations (FAO), the value of global agricultural exports nearly tripled between 2000 and 2012. As the global food demand is forecasted to increase, this trend of increased agricultural exports is expected to grow even more in the upcoming decades.

Correspondingly, the reliance on trade is expected to increase for all, either as net exporters or net importers. If there are no incentives to change the current course, Africa's net imports are expected to intensify, particularly for higher-value products, primarily because of population growth, and thus growing food demand. Currently, all major commodities are in net import status for the continent.

The following table shows the forecasted trade balance in volume terms in 2023 by FAO.

Table 3

Trade Balance Forecast by FAO in volumes

REGION	AFRICA	ASIA & THE PACIFIC	EUROPE	LATIN AMERICA & THE CARIBBEAN	NORTH AMERICA	OCEANIA DEVELOPED COUNTRIES	OTHER DEVELOPED COUNTRIES
			VOLUME OF NET EXPORTS (THOUSAND TONNES)				
Wheat	-44987	-49963	45788	-7074	46206	18329	-8299
Rice	-18052	21083	-1368	-1192	2419	299	-2637
Coarse Grains	-22851	-63999	30402	21795	53574	4154	-19595
Oilseeds	-3494	-98499	-11469	57748	58323	2921	-5185
Protein Meals	-4461	-27206	-19586	49715	8963	-2669	-4912
Beef	-877	-2105	-1110	3341	42	2224	-1147
Pork	-714	-2625	1715	-376	3621	-362	-1280
Sheep	53	-790	-140	9	-71	1032	-40
Poultry	-2192	-5234	877	3677	4710	57	-1729
Fish	-3323	9625	-1822	2015	-3406	-220	-2769
Fish Meal	43	-1418	-7	1398	125	-28	-112
Fish Oil	56	-124	-189	296	4	-12	-30
Butter	-161	-413	80	-22	98	476	-39
Cheese	-219	-633	879	-284	318	518	-365
Skim Milk Powder	-387	-1241	640	-367	826	642	-95
Whole Milk Powder	-618	-1372	379	-46	4	1656	-21
Vegetable Oils	-8775	5447	-2366	8362	235	-386	-2279
Sugar	-11684	-17342	-591	38337	-4511	3636	-4475
Cotton	1620	-7164	48	927	2562	1035	741

Source: FAO and OECD

Table 3 shows that Africa is forecasted to continue to be an importer of the majority of the commodities by 2023 if there are no interventions to improve the current situation, with the exception of sheep, fish meal, fish oil and cotton. Asia and the Pacific shares a similar fate with Africa in terms of forecasted trade volumes, which is unsurprising considering the population growth rates and economic profiles of these countries in their respective continents. The stark difference catches the attention when studying the trade volumes of North America, Oceania Developed countries, and Latin America and the Caribbean region, where the economies are expected to be export-oriented in terms of basic food commodities. The forecast of Latin American countries for a food commodity exporter is especially interesting and shows that policies tailored accordingly for a region can impact the trade profile of a continent tremendously. Finally, Europe has a balanced profile in terms of its commodity imports and exports.

Below table displays a comparison of crop yields:

Table 4

Comparative crop yields: Africa vs. the World

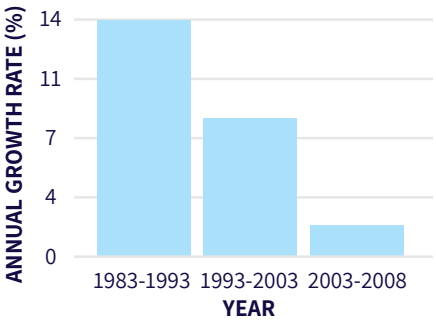
	CEREAL	FRUITS	OIL CROPS	TUBER/ ROOTS	COCOA	COFFEE	COTTON
Yield of largest African producer (hg/ha)	15280 Nigeria	190713 South Africa	25073 Nigeria	247623 South Africa	6108 Cote d'Ivorie	6721 Ethiopia	11910 Burkina Faso
Yield of world's largest producer (hg/ha)	54497 China	102246 China	334644 Indonesia	173351 China	6108 Cote d'Ivorie	12192 Brazil	38634 China

Source: FAO

With the exception of cocoa, which is a cash crop and tuber/roots, which accounts for 20% of the calories consumed in Sub-Saharan Africa, Africa has much ground to catch up in terms of crop yields. Crops such as cassava, yam and potatoes are extremely important for food security. Additionally they generate income for small businesses, especially for women. Hence they hold not only economic but also social importance for the continent. Market demand for roots and tubers is expected to continue to grow over the next 20 years, due to the fact that the main driver of growth is increasing urbanisation both at national and continent level. However, the success in increased yields when it comes to cash crops such as cocoa or strategically important tubers and roots, should not be limited to only to those if Africa is to feed the world. Crop yields must be elevated across all types of crops for sustainable farming which in turn will lessen trade deficits, boost food self-sufficiency, and finally feed the world.

Figure 5

Trade Gap Annual Growth Rate (%) in Sub-Saharan Africa



Source: FAO STAT

During what is now called the lost decade of the 1980's, Sub-Saharan African growth progress stalled and started to experience food trade deficits. This trade gap has been growing by an annual growth rate of 14% between 1983 and 1993, 8% between 1993 and 2003, and 2% between 2003 and 2008, which means that is slowly on the path towards food self-sufficiency.

Two of the essential elements of increased intraregional trade are investment in market development and sustained private-sector engagement. In many East and Southern African countries, investment and engagement have been depressed by ambiguous business environments. For example, worries about the food supply and demand situation may lead to a government ban or restriction of exports of a food product at short notice. These bans/restrictions then can result in major financial and reputational losses for private-sector exporters with existing contracts to supply a food product to buyers in an importing country. This in turn negatively impacts the eagerness of exporters to sign new contracts and decreases the chance of investments in the market-related infrastructure, such as storage, required to increase volumes of trade.

In other words, government interventions with regards to national and international agricultural trades have increased price-related risks for producers and post-production value chain actors, which then in production and market infrastructure.

It is usually not the policy mechanisms themselves that promote uncertainty, but the inconsistent and intransparent ways in which they are implemented. More transparent use of public-sector interventions and market-based approaches are required to overcome such issues. Encouraging confidence in the face of uncertainty also requires reinforced evidence on the benefits of employing less discretionary policy mechanisms.

Moreover, the African Union's Agenda 2063 has suggested how Africa can fund its own development, via a large selection of resources already available within the continent. The European Centre for Development Policy Management (ECDPM) has outlined a prospective overview of these resources and mechanisms:

- More than US$520 billion is generated annually from domestic taxes throughout the continent.
- The earnings from minerals and mineral fuels on Africa are estimated to be US$168 billion annually.
- More than US$400 billion is approximated to be held in international reserves in African central/reserve banks.
- Sovereign wealth funds has been established in 10 African countries, with a total estimated value of about US$160 billion.

It is suggested that African countries can potentially raise additional funds by setting up adequate frameworks and mechanisms to inhibit illicit financial flows, securitisation with regards to diaspora bonds and, debt brief measures.

5.0

CONCLUSION

Given continued population growth and urbanisation, the food security issues that are already affecting Africa are expected to worsen in the near future. However, the outlook is not all bleak. On the contrary, the continent can potentially feed not only itself but also the world if African farmers and agri-businesses can:

- **Increase yields**
- **Adopt new technologies for sustainable agriculture**
- **Reduce waste**
- **Decrease trade-related bottlenecks**
- **Adapt to the changing global agricultural trade landscape**

About us

Farrelly & Mitchell empower some of the world's most ambitious companies and agencies to make the right decisions. With expert insight, local market intelligence and airtight recommendations, we build and implement sustainable strategies that allow our clients to restructure, transform and grow.

We have the hands-on industry experience and expertise, which we combine with local market insight and contacts to help our agribusiness, food and beverage clients to increase profits and improve efficiencies.

What makes us different?

We go above and beyond traditional consultants. As an international management consultancy, we specialise in the global food and agribusiness industry, with a particular focus on the implementation or execution of our recommendations. So we are committed to working with our clients, not just in the development or planning phase of a project, but importantly in its full implementation.

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We understand food and agribusiness; we built our experience in this sector, and we employ the best global talent to provide in-depth solutions by addressing real problems sustainably and creating new opportunities for clients.

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Each member of our team of over 200 experienced consultants has worked in industry at an operational and executive level.

We work globally with significant experience in Europe, Middle East and African markets.

Why partner with Farrelly & Mitchell?

Our team has worked at operational and strategic levels all over the European, Middle Eastern, and broader international food, beverage and agribusiness sectors. We have seen projects through from paddock to plate.

We understand the opportunities presented by the growth of the food, beverage and agribusiness sectors, in the Gulf region and across the globe. We work with primary producers, manufacturers, distributors and retailers.

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