

AgriTech Africa Report: 2025

The Digital Plough

Preface: The Soil That Becomes Code

The story of 2025 is not one of growth. It is one of **fracture**. A clean break between the gleam of the server farm and the grit of the soil. We measured success in billions: an **\$8.5 billion market**, digital tools reaching **85 million farmers**, satellites mapping **28 million hectares**. Yet, the stomach of the continent still grows. This is an autopsy of that disconnect—a body convulsing between the algorithm and the empty bowl.

1. The Digital Plough & the Earthly Scar

They called it precision. **AI, drones, IoT sensors** descended like a new weather system. The promise was a gospel of efficiency: **32% yield increases, 28% lower costs**. Startups—over **1,000** of them—preached this future.

But the earth is not a database. The foundational code is bugged. **70% of the farming population lives in rural areas where connectivity is a ghost**. The digital plough requires a signal; the soil offers only silence.



The Age Gap

Average farmer: **60 years old**

Continental youth: **60% under 25**

The Language Barrier

Technology speaks Python

Inheritors speak a thousand tongues, none digital

The Foundation

A skyscraper of innovation on quicksand of historical neglect

2. The Architecture of Hype & the Real Field

Forty-eight nations signed the **Kampala Declaration**. A pledge to allocate **10% of public resources** to entire food systems. A systems-wide vision! On paper. In reality, policies are **ghost architecture**. They cite **blockchain traceability** but forget the **\$67-\$108 billion annual gap** for roads and storage that cause **30% of all food to rot** before market.

\$70B

Food Imports

Bleeding fragile economies annually

30%

Food Waste

Rotting before reaching market

48

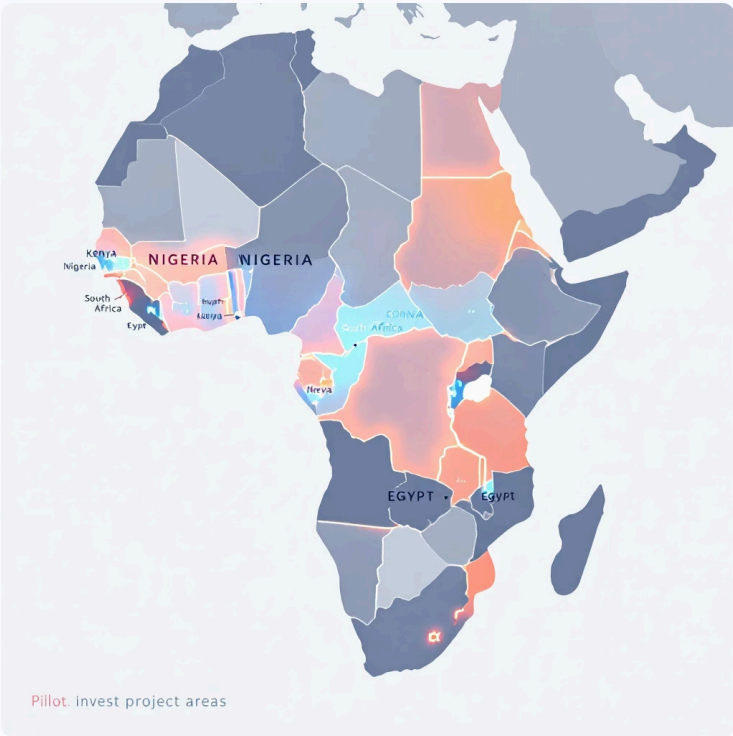
Signatory Nations

Kampala Declaration pledge

They promote **digital marketplaces** whilst **non-tariff barriers** strangle regional trade. The blueprint is flawless. It speaks of "harmonised standards" and "ecosystem security." The field is governed by older, crueller logics: poor roads, no cold chains, bleeding economies. The plan is a spaceship design pinned to the wall of a shed with no electricity.

3. Venture Tracks & The Zombie Unicorns

Capital is a nervous animal. After the 2024 drought—a **22% VC plunge**—it returned in 2025, cautious, smelling not of disruption but of **de-risking**. The big, reckless bets were dead. The survivors were **zombie unicorns**: not mythical, but undead, shuffling forward on the oxygen of restructuring and debt.



1

Twiga Foods

The once-giant, now a case study in **"optimisation."** Its founder gone, its model paused, surviving on leaner, meaner logic. The bridge between farm and fork? It charged a toll the farmers could not pay.

2

Apollo Agriculture

Shunned the sexy VC for the grey suit, securing a **\$4 million guarantee** from the African Development Bank. Not growth capital—**trade credit**. A bet on fertiliser and faith, not apps.

3

Hello Tractor

Pivoted to **"Pay-As-You-Go"**—a high-tech sharecropping. You don't own the machine; you rent your own sweat from it, tracked by its GPS.

The money, that **~\$150-200 million** for the sector, didn't water the field. It pooled in the hubs, funding **"safe" bets** that partnered with NGOs and development banks. The revolution was not funded; it was **granted**.

4. The Promise vs. The Human Failing

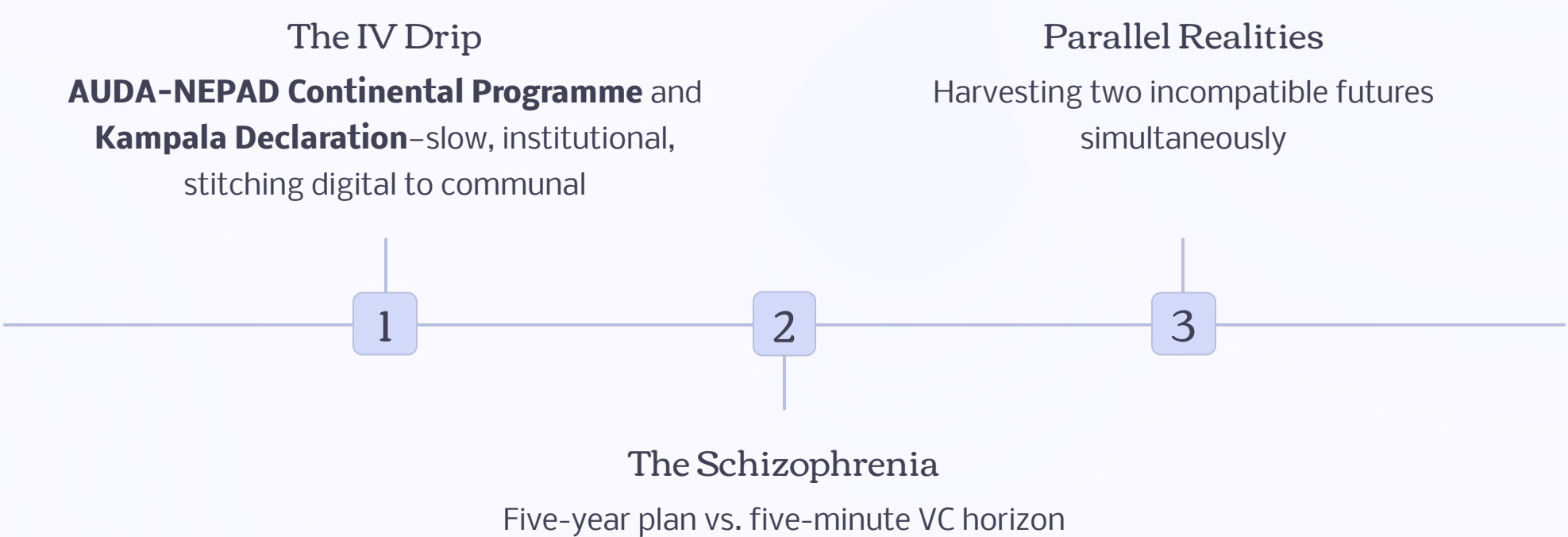
They talk of **fintech inclusion**. Of **digital credit scores** for the unbanked. In Kenya, **M-Pesa** *does* facilitate payments—a rare success. But for most, inclusion is a snake eating its tail: loans for the patented seeds the app recommends, at rates that ensure the harvest is never yours.



The core failing is biological, not digital. A shortfall of millions of young farmers. The sector that contributes **32% of Africa's GDP** and employs **over 60%** of its people is run by an ageing generation. The apps deliver weather alerts, but cannot summon the rain. They diagnose blight, but cannot build the road to bring the medicine. The human infrastructure—the hands, the hearts, the next generation—is crumbling. We are automating a corpse.

Conclusion: The Prognosis (The Hollow Harvest)

The patient is not dead. It is in a state of permanent spasm.



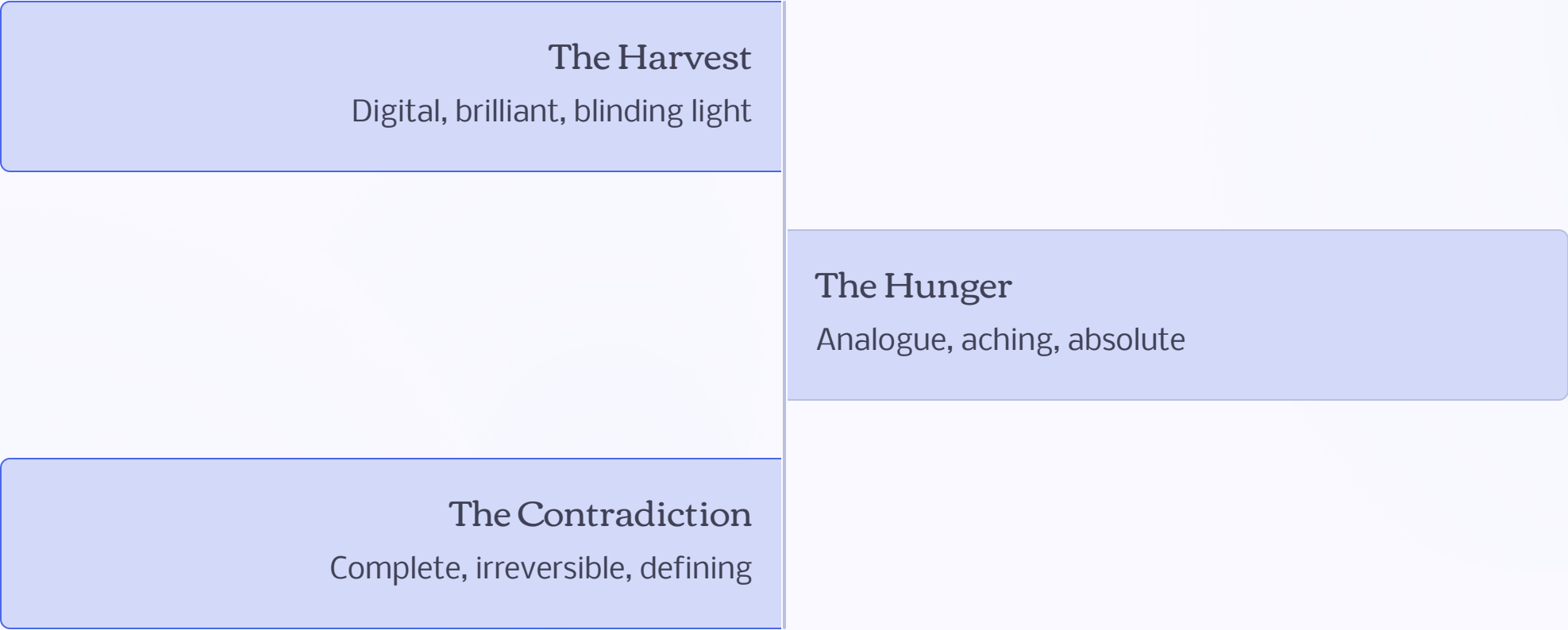
Reality One

- **AI** and automation
- **\$1 trillion market** projections by 2030
- **AfCFTA** trade growth
- Silicon valley dreams

Reality Two

- Dust and drought
- Rotting grain
- A 60-year-old back breaking
- Sun monitored by satellite

AgriTech in Africa, 2025, is the sound of one hand clapping. The hand is made of silicon. The other hand—the one that feels the soil, that plants the seed, that aches with hunger—is missing.



The state is not one of growth. It is a state of **brilliant, blinding light, shining on a wreckage.**