Establishing Predictable Agricultural Trade Policies in Malawi through Market-led Governance

From "Stop-Go" Trade Controls to Predictable Market-Led Trade Governance

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Malawi's trade problem is not only low exports; it is unpredictable policy, weak incentives and narrow diversification.

Malawi presents a case for agricultural trade policy reform. The central argument is that Malawi's agricultural sector has significant potential to support growth, foreign exchange generation, food security and regional trade integration, but this potential is repeatedly undermined by fragmented, discretionary and unpredictable agricultural trade restrictions. These restrictions have historically taken the form of ad hoc export bans, import restrictions, discretionary licensing, administered pricing, public stock interventions and crisis-driven controls, especially around maize, which remains politically sensitive and central to national food security concerns (Pangapanga-Phiri et al., 2026a; Pangapanga-Phiri et al., 2026b).

The Malawi case is therefore not simply about trade liberalization versus protection. It is about how to build a predictable, transparent and rules-based trade governance system that protects food security without suppressing farmer incentives, discouraging private investment, expanding informal trade or undermining regional credibility. Agriculture remains the backbone of Malawi's economy, employing about 64 percent of the workforce, contributing approximately 22.3 percent to GDP, and generating more than 80 percent of foreign exchange earnings. Yet, the sector's contribution to economic transformation remains constrained by a narrow export base, high dependence on tobacco, tea and pulses, limited diversification, high import dependence and recurring foreign exchange pressures (Pangapanga-Phiri et al., 2026a; Pangapanga-Phiri et al., 2026b).

Malawi's trade imbalance has worsened significantly, rising from roughly US$1 billion in 2018 to above US$2 billion by 2025. Imports remain dominated by essential goods such as fuel, fertilizer, machinery, processed foods and emergency food supplies, while exports remain concentrated in raw or semi-processed agricultural commodities. This imbalance has contributed to foreign exchange shortages, currency devaluations, inflationary pressure and a widening parallel market premium. In this context, agricultural trade policy is not a narrow sectoral issue; it is a macroeconomic stabilization issue, an export diversification issue and a regional integration issue (Pangapanga-Phiri et al., 2026b).

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Malawi's Agricultural Trade Opportunity: Strong Resource Base, Weak Export Conversion

Malawi is endowed with fertile soils, water resources, lakes, rivers and a largely agrarian population. These natural endowments should support a stronger transition toward commercial agriculture and regional food market participation. However, the country's structural transformation has been constrained by a narrow economic base and policy instability. Malawi's export structure remains highly concentrated in tobacco, tea and pulses, making the economy vulnerable to global price swings, climate shocks, exchange rate volatility and market access disruptions (Pangapanga-Phiri et al., 2026a; Pangapanga-Phiri et al., 2026b).

Malawi's traditional export partners remain important, particularly South Africa and India for legumes, while the United Arab Emirates has emerged as a re-export hub, and Russia, Turkey and parts of Asia are growing destinations for tobacco. Yet, within Africa, Malawi imports more than it exports to several nearby economies, including South Africa, Tanzania, Zambia and Mozambique, with positive balances only in selected markets such as Zimbabwe and Rwanda. This indicates that proximity alone has not translated into competitive market penetration. Malawi has not fully converted its geographical position into regional market leadership (Pangapanga-Phiri et al., 2026b).

This weakness is particularly significant under SADC, COMESA and AfCFTA. These frameworks offer market access opportunities, but Malawi's domestic trade restrictions often conflict with the spirit of regional integration. When Malawi imposes sudden export bans or import controls, it undermines trust with trading partners, reduces the reliability of formal trade channels and creates incentives for retaliatory measures. These policy actions have strained relationships with Tanzania and Zambia, including episodes of retaliation that damage regional market confidence (Pangapanga-Phiri et al., 2026a; Pangapanga-Phiri et al., 2026b).

The strategic opportunity for Malawi is therefore to move from a maize-centered, crisis-driven trade regime toward a broader export competitiveness framework. This requires predictable rules for staples, a no-ban guarantee for selected high-value export crops, stronger commodity exchanges, warehouse receipt systems, export diversification and better regional alignment.

Trade Barrier One: Policy Unpredictability and Discretionary Export Bans

Trade interventions should be triggered by data, not panic; by rules, not discretion.

The most important trade barrier identified is the country's "stop-go" agricultural trade policy regime. This regime is characterized by recurrent export bans, discretionary import restrictions, administered prices and reactive crisis management. The problem is most visible in maize, where policy interventions are often justified by food security concerns but implemented through broad controls that distort market incentives (Pangapanga-Phiri et al., 2026b).

Discretionary restrictions under the Control of Goods Act have institutionalized unpredictability. Between 2018 and 2024, this unpredictability increased transaction costs by 15–20 percent and pushed informal trade to around 40 percent. The 2024–2025 period is described as one of reactive crisis management, associated with macroeconomic stress, price volatility and retaliatory restrictions from regional partners (Pangapanga-Phiri et al., 2026a; Pangapanga-Phiri et al., 2026b).

This unpredictability matters because agricultural markets require forward planning. Farmers decide what to plant based on expected prices and market access. Traders require confidence to invest in aggregation, storage and transport. Processors require reliable raw material supply. Banks and investors require predictable rules before financing agricultural value chains. When the government can close or open trade abruptly, all market actors reduce risk exposure. Farmers produce less for commercial markets, traders avoid formal channels, processors face inconsistent supply, and regional buyers look elsewhere.

The practical solution is to establish a transparent rules-based agricultural trade policy framework. Rather than imposing export bans through discretionary decisions, Malawi should define objective triggers for intervention. These could include national maize stock levels falling below a specified number of months of consumption, verified production shortfalls, food price increases exceeding 20–30 percent above seasonal averages, or early warning indicators showing severe supply stress. Restrictions should be publicly announced, time-bound, evidence-based and subject to regular review.

Trade Barrier Two: Weak Use of Data, Forecasting and Early Warning Systems

A second major barrier is the limited use of data and analytical tools in trade policy decisions. Fewer than 30 percent of trade policies are backed by formal evidence and that robust analytical tools from the World Bank, CGIAR and academia are often sidelined by short-term political and crisis pressures (Pangapanga-Phiri et al., 2026b).

This creates a major technocratic gap. In a country exposed to climate shocks, seasonal price volatility, stock depletion and import dependence, trade policy should be anchored in real-time data on production, stocks, consumption, prices, imports, regional supply and household vulnerability. Without these data, policy becomes reactive. Restrictions are introduced late, lifted late, or applied too broadly. This worsens the very instability they are intended to manage.

Malawi's policy has often tried to keep maize prices low, including by more than six percent relative to the base in some modelling scenarios. However, the welfare problem for many households is not only the annual average price; it is seasonal volatility driven by domestic stock depletion, climate shocks and poorly timed public interventions. Poor households are affected both as producers and net buyers, which makes the welfare effects of trade restrictions ambiguous and often negative (Pangapanga-Phiri et al., 2026b).

The practical solution is to institutionalize a data-driven policy framework. Malawi should develop an integrated agricultural trade dashboard that combines crop forecasts, market prices, ADMARC and NFRA stock levels, private stock estimates, household food security indicators, regional price data, import parity and export parity prices. This system should be used to trigger policy decisions, publish food balance sheets and provide transparent signals to the market.

Trade Barrier Three: Informalization of Trade and High Transaction Costs

Unpredictable trade controls push a significant share of agricultural trade into informal channels. During restriction periods, informal flows can account for around 40 percent of maize trade. Informal traders face transaction costs that are 62 percent higher than formal actors, while domestic prices can rise to 50 percent above import parity and formal transaction costs increase by 15–20 percent (Pangapanga-Phiri et al., 2026b).

When formal trade is blocked, trade does not disappear; it becomes costlier, riskier and less visible.

This finding is especially important because trade restrictions are often intended to protect consumers by keeping food within the country. In practice, however, they can generate opposite effects. If formal trade is blocked, trade does not necessarily stop; it moves underground. Informal trade reduces government revenue, weakens regulatory oversight, increases transaction costs, creates opportunities for rent-seeking and makes market data less reliable. It also undermines official food balance assessments because significant volumes move outside formal monitoring systems.

The practical solution is to reduce the incentives for informal trade by making formal trade predictable, affordable and efficient. Export and import permits should be transparent, digital, time-bound and rules-based. Border procedures should be simplified for small traders. Commodity exchange and warehouse receipt systems should be strengthened so that formal channels become commercially attractive. Malawi should also improve cross-border market monitoring with Zambia, Tanzania and Mozambique to reduce smuggling incentives and support better regional supply planning.

Trade Barrier Four: Regional Misalignment and Retaliatory Trade Measures

Domestic trade restrictions are often poorly aligned with regional commitments under SADC, COMESA and AfCFTA. This weakens Malawi's credibility as a regional trading partner and constrains its ability to transition into a commercialized agricultural leader. For example, in 2025, Malawi's maize export ban reportedly prompted a counter-ban from Tanzania on Malawian soybeans, disrupting an important outlet for agricultural surpluses (Pangapanga-Phiri et al., 2026b).

This is a serious regional integration problem. AfCFTA and regional economic communities depend on predictability, mutual trust and policy coordination. If countries impose abrupt bans without consultation, the result is retaliation, market fragmentation and higher food price volatility. For Malawi, a land-linked economy dependent on regional markets and regional imports, this is particularly costly.

The solution is to enhance regional policy alignment. Malawi should commit to transparent notification procedures before imposing trade restrictions, consult regional partners in advance, and use SADC, COMESA and AfCFTA dispute resolution and non-tariff barrier mechanisms. Where restrictions are required for food security, they should be justified by published data and communicated through regional channels. Malawi should also negotiate commodity-specific regional protocols for maize, soybeans, pulses and oilseeds to avoid tit-for-tat restrictions.

Trade Barrier Five: Concentrated Market Power and Weak Price Transmission

Another important structural barrier is the concentration of market power among a small number of dominant off-takers. Malawi is largely characterised by an oligopolistic or oligopsonistic environment in which large processors and off-takers can dictate "take-it-or-leave-it" prices through uncontested price leadership. This weakens price transmission, bypasses competitive bidding and can force smallholder farmers to sell below official government farmgate price mandates (Pangapanga-Phiri et al., 2026b).

This challenge is often overlooked in trade policy debates. Even if export bans are removed, farmers may not benefit fully from market opportunities if domestic markets are dominated by a few buyers. Concentrated market power reduces incentives for farmers to invest in productivity and quality. It also weakens the link between regional prices and farmgate prices.

The solution is to strengthen competitive market institutions. Malawi should expand commodity exchange trading, warehouse receipt systems, transparent auction mechanisms and price information systems. Formal commodity exchanges can reduce monopsony power by giving farmers and aggregators access to broader buyer networks. Warehouse receipt systems can reduce distress sales by allowing farmers to store produce and access finance. Minimum farmgate prices should be supported by competitive procurement systems, not only by administrative declarations.

Trade Barrier Six: Overemphasis on Maize and Weak Export Diversification

Malawi cannot diversify exports while maize absorbs most policy attention and fiscal space.

Malawi's agricultural policy remains heavily biased toward maize, even though long-term export diversification is central to economic transformation. Maize absorbs much of the fiscal, political and policy attention, while high-value export opportunities in oilseeds, pulses, tea, tobacco alternatives, horticulture, livestock products and agro-processing remain underdeveloped (Pangapanga-Phiri et al., 2026a; Pangapanga-Phiri et al., 2026b).

This creates a structural trap. Because maize is politically sensitive, the government intervenes heavily. These interventions then distort markets and discourage private investment. Because private investment is weak, storage, processing and market systems remain underdeveloped. Because these systems remain weak, the government continues to intervene. The result is a cycle of subsistence orientation rather than commercial transformation.

The solution is to rebalance agricultural policy support beyond maize. This does not mean abandoning maize food security. It means separating maize stabilization from broader export development. Malawi should implement a no-ban guarantee for high-value oilseeds and other export-oriented value chains, protect agro-processing investments from sudden policy reversals, and develop targeted export strategies for legumes, oilseeds, tea, horticulture and livestock feed value chains.

Trade Barrier Seven: Negative Welfare and Macroeconomic Effects of Trade Restrictions

Economy-wide modelling, based on the 2022 Malawi Social Accounting Matrix, show that moderate export taxes may increase domestic absorption and private consumption in the short term, but they reduce exports and slightly reduce GDP. At export tax rates of 20–60 percent, exports decline by 5.24–13.37 percent, while GDP declines modestly. At an extreme restriction level of 80 percent or more, domestic absorption and consumption contract by 1.18 percent and GDP falls sharply by 2.40–2.65 percent (Pangapanga-Phiri et al., 2026b).

This finding is critical. It shows that while restrictions may create short-term domestic availability, excessive restrictions become counterproductive. They suppress exports, distort incentives, increase import dependence, reduce GDP and weaken household welfare. The household welfare simulations also show negative effects on household income and consumption, with poor and rural households particularly affected (Pangapanga-Phiri et al., 2026a; Pangapanga-Phiri et al., 2026b).

The practical policy implication is that Malawi should shift from broad market suppression to targeted safety nets. If the objective is to protect vulnerable households during food price shocks, direct and transparent social protection is more efficient than economy-wide trade bans. Targeted transfers, school feeding, public works, strategic grain releases and nutrition-sensitive support can protect vulnerable households without undermining production incentives and private trade.

Policy Package: Practical Steps to Resolve Malawi's Trade Barriers

The Malawi trade barriers point toward the need for a coherent reform package.

First, Malawi should establish a transparent rules-based trade policy framework. This framework should define when and how trade interventions may occur, using objective triggers such as stock levels, seasonal price bands, early warning indicators and food balance sheets.

Second, Malawi should adopt a market-led equalization framework. This should include a no-ban guarantee for high-value oilseeds and other export-oriented crops, while requiring formal trading through commodity exchanges or transparent platforms where appropriate.

Third, Malawi should institutionalize data-driven policy decision-making. Economy-wide analysis, early warning systems, real-time stock data, market intelligence and price monitoring should be formally integrated into trade policy decisions.

Fourth, Malawi should strengthen strategic grain reserves and warehouse receipt systems. Instead of broad bans, the country should use transparent reserves, structured storage and market-based stabilization instruments to manage seasonal volatility.

Fifth, Malawi should formalize inclusive public-private policy dialogue. Farmers, traders, processors, financial institutions and regional partners should be consulted before major trade changes. A minimum 30-day notice period should be introduced for non-emergency policy changes.

Sixth, Malawi should establish an inter-ministerial coordination platform. The Ministries of Trade, Agriculture and Finance, together with enforcement agencies, MITC, ADMARC and NFRA, should coordinate before trade interventions are announced.

Seventh, Malawi should shift from broad market suppression to targeted safety nets. Food security support should be directed at vulnerable households rather than imposed through blanket trade restrictions.

Finally, Malawi should rebalance agricultural policy beyond maize. Export diversification, agro-processing, oilseeds, legumes, pulses, horticulture and livestock feed value chains should receive stronger policy and investment attention.

Toward a Predictable, Rules-Based and Export-Oriented Agricultural Trade System

The Malawi's agricultural trade policy present a clear and compelling case for reform. The country's agricultural trade policy has been shaped for decades by a tension between food security management and market development. While the objective of protecting consumers and stabilizing maize markets is legitimate, the instruments used - especially ad hoc bans, discretionary import restrictions and reactive controls - have often produced unintended consequences. They have inflated transaction costs, weakened producer incentives, discouraged private investment, pushed trade into informal channels, strained regional relationships and reduced macroeconomic performance.

The most important reform message is that Malawi does not need to choose between food security and trade. It needs better instruments. Rules-based triggers, transparent food balance sheets, strategic grain reserves, warehouse receipt systems, targeted safety nets, early warning systems and structured public-private dialogue can protect food security while preserving market incentives. The country must move from a "stop-go" regime toward a predictable and market-led framework.

Malawi's agricultural future depends on building trust. Farmers need confidence that markets will remain open. Traders need confidence that contracts will be honoured. Processors need confidence that raw materials will be available. Regional partners need confidence that Malawi will uphold predictable trading commitments. If Malawi can establish a transparent, data-driven and regionally aligned trade policy system, it can reduce volatility, strengthen export diversification, attract private investment and position agriculture as a more reliable driver of macroeconomic recovery and regional competitiveness.

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efforts of the Africa Network of Agricultural Policy Research Institutes (ANAPRI) to promote evidence-informed policy dialogue to strengthen agricultural trade across Africa.

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Annex 1: Implementation Matrix: Policy Issues, Recommendations, Actions and Institutional Responsibilities

KEY POLICY ISSUE	PROPOSED RECOMMENDATION	ACTIONS AND IMPLEMENTATION ACTIVITIES	LEAD INSTITUTIONS	SUPPORT AND COORDINATION ACTORS
POLICY UNPREDICTABILITY AND DISCRETIONARY EXPORT BANS	Establish a transparent rules-based agricultural trade policy framework.	Define objective triggers for export/import interventions using stock levels, price bands, production forecasts and food balance sheets. Publish intervention rules before the marketing season. Make restrictions time-bound and subject to review.	Ministry of Trade and Industry; Ministry of Agriculture; Cabinet Committee on Economy	CARD/LUANAR; ANAPRI; MITC; farmer organisations; private traders; processors; development partners
WEAK USE OF DATA AND ANALYTICAL TOOLS	Institutionalize data-driven trade policy decision-making.	Create an agricultural trade dashboard combining production forecasts, market prices, stocks, imports, exports, early warning data and regional prices. Require evidence notes before major trade restrictions.	Ministry of Agriculture; National Statistical Office; Ministry of Trade and Industry	CARD/LUANAR; World Bank; CGIAR/IFPRI; universities; Famine Early Warning Systems; development partners
ABSENCE OF EARLY WARNING SYSTEMS IN TRADE DECISIONS	Strengthen real-time early warning and market monitoring systems.	Integrate weather forecasts, crop estimates, food security indicators, ADMARC/NFRA stock levels and private stock estimates. Publish regular food balance sheets.	Ministry of Agriculture; Department of Disaster Management Affairs; NFRA	NSO; CARD/LUANAR; FEWS NET-type systems; WFP; FAO; farmer organisations
INFORMALIZATION OF TRADE	Reduce incentives for informal trade by making formal trade predictable and affordable.	Simplify permits. Digitize licensing. Reduce arbitrary enforcement. Create small trader support desks at borders. Monitor cross-border flows with Zambia, Tanzania and Mozambique.	Ministry of Trade and Industry; Malawi Revenue Authority; border agencies	SADC; COMESA; AfCFTA NTB mechanism; trader associations; local authorities; customs agencies in neighbouring countries
HIGH FORMAL AND INFORMAL TRANSACTION COSTS	Lower the transaction cost burden on formal agricultural trade.	Audit trade costs across permits, checkpoints, levies, licensing and border procedures. Remove duplicative fees. Publish official fees and processing timelines.	Ministry of Finance; Ministry of Trade and Industry; Malawi Revenue Authority	MITC; private sector associations; CARD/LUANAR; chambers of commerce

KEY POLICY ISSUE	PROPOSED RECOMMENDATION	ACTIONS AND IMPLEMENTATION ACTIVITIES	LEAD INSTITUTIONS	SUPPORT AND COORDINATION ACTORS
REGIONAL RETALIATION AND WEAK ALIGNMENT WITH SADC, COMESA AND AFCFTA	Enhance regional policy alignment and notification procedures.	Notify regional partners before restrictions. Use SADC, COMESA and AfCFTA mechanisms for dispute resolution. Establish bilateral commodity coordination platforms with Tanzania, Zambia and Mozambique.	Ministry of Foreign Affairs; Ministry of Trade and Industry; Ministry of Agriculture	SADC Secretariat; COMESA Secretariat; AfCFTA Secretariat; regional trade partners; ANAPRI
CONCENTRATED MARKET POWER AMONG OFF-TAKERS	Strengthen competitive market institutions and price discovery.	Expand commodity exchange trading. Promote transparent auctions and warehouse receipt systems. Publish reference prices. Support farmer aggregation to increase bargaining power.	Ministry of Agriculture; Agricultural Commodity Exchange actors; Competition and Fair Trading Commission	Farmer organisations; cooperatives; processors; banks; CARD/LUANAR; development partners
WEAK PRICE TRANSMISSION TO FARMERS	Improve market transparency and enforce fair trading practices.	Strengthen market information systems. Monitor farmgate prices against official minimum prices. Investigate anti-competitive buying practices. Promote contract enforcement.	Ministry of Agriculture; Competition and Fair Trading Commission	Farmer organisations; trader associations; local governments; CARD/LUANAR
MAIZE-CENTERED POLICY BIAS	Rebalance agricultural policy support beyond maize.	Develop export strategies for oilseeds, pulses, legumes, tea, horticulture and livestock feed value chains. Ring-fence support for commercial export crops. Reduce over-reliance on maize subsidies and crisis interventions.	Ministry of Agriculture; Ministry of Trade and Industry	MITC; CARD/LUANAR; ANAPRI; producer associations; processors; development partners
HIGH-VALUE CROPS EXPOSED TO SUDDEN BANS	Adopt a no-ban guarantee for selected high-value export value chains.	Identify high-value crops eligible for no-ban treatment, especially oilseeds and export-oriented legumes. Protect agro-processing investors from sudden market closures.	Ministry of Trade and Industry; Ministry of Agriculture	MITC; processors; exporters; farmer organisations; investment promotion agencies

KEY POLICY ISSUE	PROPOSED RECOMMENDATION	ACTIONS AND IMPLEMENTATION ACTIVITIES	LEAD INSTITUTIONS	SUPPORT AND COORDINATION ACTORS
WEAK PRIVATE STORAGE AND LIMITED FORMAL ARBITRAGE	Strengthen private storage, warehouse receipts and trade finance.	Expand certified warehouses. Promote warehouse receipt finance. Support seasonal storage by private traders. Avoid crowding out private storage through sudden ADMARC interventions.	Ministry of Agriculture; Reserve Bank of Malawi; Ministry of Finance	Commercial banks; warehouse operators; commodity exchanges; development finance institutions
OVERLAPPING MANDATES AMONG TRADE, AGRICULTURE AND ENFORCEMENT AGENCIES	Establish an inter-ministerial agricultural trade coordination platform.	Create a high-level coordination body linking Trade, Agriculture, Finance, MRA, MITC, ADMARC and NFRA. Require joint approval of major trade interventions. Publish coordinated policy statements.	Office of the President and Cabinet; Ministry of Trade and Industry; Ministry of Agriculture	Ministry of Finance; MRA; MITC; ADMARC; NFRA; CARD/LUANAR; private sector
INADEQUATE STAKEHOLDER ENGAGEMENT	Formalize inclusive public-private trade policy dialogue.	Convene regular agricultural trade forums. Require stakeholder consultation before policy changes. Introduce a minimum 30-day notice period for non-emergency trade changes.	Ministry of Trade and Industry; Ministry of Agriculture	Farmer organisations; private sector associations; processors; traders; CARD/LUANAR; ANAPRI
BROAD MARKET SUPPRESSION USED FOR FOOD SECURITY	Shift toward targeted safety nets and strategic grain management.	Use targeted transfers, public works, school feeding and strategic grain releases to protect vulnerable households. Avoid blanket export bans as a primary social protection tool.	Ministry of Finance; Ministry of Agriculture; Ministry of Gender, Community Development and Social Welfare	NFRA; ADMARC; WFP; FAO; development partners; local governments
WEAK EXPORT DIVERSIFICATION AND NARROW EXPORT BASE	Develop an agricultural export diversification and competitiveness strategy.	Identify priority export products. Support processing, certification, branding, quality upgrading and market development. Link producers to regional and global buyers.	Ministry of Trade and Industry; MITC; Ministry of Agriculture	Exporters; processors; farmer groups; Malawi Bureau of Standards; development partners

KEY POLICY ISSUE	PROPOSED RECOMMENDATION	ACTIONS AND IMPLEMENTATION ACTIVITIES	LEAD INSTITUTIONS	SUPPORT AND COORDINATION ACTORS
MACROECONOMIC VULNERABILITY FROM TRADE IMBALANCE	Use agricultural trade reform to support foreign exchange generation.	Promote export-oriented agriculture, reduce policy risks, support value addition, and align trade policy with macroeconomic stabilization goals.	Ministry of Finance; Reserve Bank of Malawi; Ministry of Trade and Industry	MITC; Ministry of Agriculture; CARD/LUANAR; World Bank; IMF-type partners; private sector
WEAK IMPLEMENTATION ACCOUNTABILITY	Create an agricultural trade reform implementation tracker.	Assign reform owners, timelines and indicators. Track progress on rules-based policy, regional alignment, stakeholder dialogue, warehouse receipts, market intelligence and export diversification.	Office of the President and Cabinet; Ministry of Trade and Industry	Ministry of Agriculture; CARD/LUANAR; ANAPRI; private sector; development partners