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**Intra-Africa trade in agr products
(ambiguous instructions)**

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Background

- Based on chapter in the tralac/NAMC book

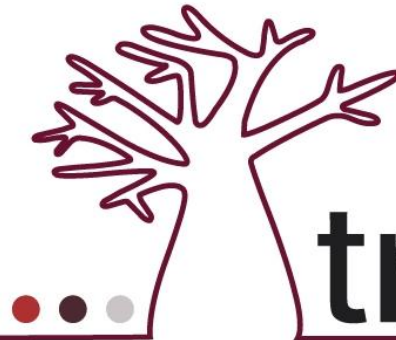
Old friends, new friends and good friends (EU & US; BRICs; and Africa)

Black holes in trade data

- **2014 South African exports to China \$8.7 bill - gold ? - China imports \$44.6 billion 'Special'.**
- **South Africa importation HS 61 and 62 from China are 50% Chinese exports**
- **Tobacco - Zimbabwe (China / South Africa)**
- **Intra- Afr ships trade**
- **Reliable Intra-SACU only from 2010**
- ***Informal***

Trade data

- **ITC best source**
- **But some African countries do not report**
- **Therefore use of mirror data**
- **What are we measuring ??(eg, CiF versus FoB)**
- **Moral is be very careful of African trade data**



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African Imports from Africa 2013

| | Product | \$ millions | | % share | |
|-----|---------------|-------------|------|---------|------|
| | | 2013 | 2013 | 2013 | 2013 |
| HS | Total | 85,836 | | 14.2% | |
| '27 | Fuels | 23,849 | | 24.0% | |
| '89 | Ships, etc. | 6,432 | | 28.9% | |
| '84 | Machinery | 4,726 | | 6.7% | |
| '17 | Sugars | 1,191 | | 17.7% | |
| '22 | Beverages | 1,085 | | 28.2% | |
| '15 | Fats and oils | 1,022 | | 11.7% | |
| '24 | Tobacco | 982 | | 36.7% | |
| '09 | Coffee, tea | 977 | | 45.1% | |

Agriculture

- **agriculture - WTO definition, a definition that basically covers the HS Chapters 01 through to and including HS 24, with the exception of Chapter 03 (fish products) and the fisheries products from HS 16.**
- **Plus some later HS Chapters - casein, hides and skins, wool and cotton.**
- **The data from the International Trade Centre (ITC) for 2001 to 2013 (where available) and in US dollars.**
- **Data for the RSA section sourced from the commercially obtainable Global Trade Atlas (GTA) data base, and uses the annual data for 1996 to 2013 inclusive**
- **expressed in Rand rather than US dollars.**

African agr exports

- **Overall, the African global share of world agricultural exports is edging upwards.**
- **The main African agricultural exporters by country in 2012 were Nigeria, South Africa, Côte d'Ivoire, Ghana, Egypt, Ethiopia, Morocco, Kenya, Tanzania and Zimbabwe**
- **Cocoa and fruit and nuts are the two main commodity exports from Africa, followed by coffee, cotton and tobacco.**
- .

Imports

- For African agricultural **imports** the market share of the EU is declining over time, as are the shares from both Africa and the US.
- BRICs increased, but aggregate share from 'friends' has declined over time (Mercosur, ASEAN).
- Egypt was the leading agricultural importer during 2013, followed by Algeria, Nigeria, South Africa, Morocco, Angola and Libya.
- The main African agricultural imports were cereals, fats and oils, sugars, dairy products and meat and meat products.

Balance

- Agriculture had a % share of total African exports of 7.9 % for 2011 and 8.6% for 2012, while for imports the respective years were 16.8% and 15.3%.
- Africa is therefore a net agricultural importer overall

African agricultural exports, US\$ million

| Exporters / Yr | 2003 | 2007 | 2012 | 2013 |
|-------------------|--------|--------|--------|--------|
| Africa \$ m | 15,890 | 22,453 | 40,783 | 34,343 |
| Africa % of world | 3.0% | 2.6% | 4.0% | |
| % to EU | 54.8% | 53.4% | 35.4% | |
| % to Africa | 25.7% | 25.9% | 22.6% | |
| % to BRICs | 6.7% | 6.8% | 11.2% | |
| % to US | 7.9% | 5.8% | 4.2% | |
| Sub total | 95.1% | 92.0% | 73.4% | |

Agr exporters, US\$ million (Data problems)

| Exporters | 2001 | 2007 | 2012 | 2013 |
|---------------|--------|--------|--------|--------|
| Africa | 11,410 | 24,416 | 55,542 | 18,844 |
| Nigeria | 5 | 957 | 7,902 | 0 |
| South Africa | 2,258 | 3,980 | 6,491 | 9,206 |
| Côte d'Ivoire | 2,094 | 3,289 | 5,990 | 0 |
| Ghana | 0 | 1,285 | 5,660 | 0 |
| Egypt | 0 | 0 | 4,958 | 0 |
| Ethiopia | 308 | 1,004 | 3,642 | 0 |
| Morocco | 0 | 2,130 | 2,966 | 3,387 |
| Kenya | 1,036 | 2,151 | 2,858 | 0 |
| Tanzania | 305 | 671 | 1,576 | 1,338 |
| Zimbabwe | 802 | 874 | 1,260 | 1,226 |

Exports, \$ million

| Exports | 2011 | 2012 |
|---------------------|-------|--------|
| agriculture % total | 7.9% | 8.6% |
| Cocoa | 8,609 | 10,941 |
| Fruit, nuts | 6,614 | 9,353 |
| Coffee, tea | 4,159 | 4,461 |
| Cotton | 3,037 | 3,407 |
| Tobacco | 2,767 | 3,119 |
| Vegetables | 3,318 | 3,002 |
| Oil seed | 1,980 | 2,357 |
| Sugars | 2,308 | 2,001 |
| Fats and oils | 2,396 | 1,927 |
| Dairy | 953 | 1,915 |

African agr imports by % source

| Sources | 2003 | 2007 | 2012 |
|-----------------------|-------------|-------------|-------------|
| African agr \$m | 21,132 | 40,482 | 86,414 |
| Africa % world | 3.6% | 4.3% | 6.1% |
| from EU | 42.0% | 35.6% | 23.4% |
| from Africa | 19.9% | 15.7% | 13.1% |
| from BRICs | 16.0% | 21.2% | 24.0% |
| from USA | 14.7% | 16.3% | 7.2% |
| sub total | 92.6% | 88.8% | 67.8% |

African agr importers

| Importers | 2011 | 2012 |
|---------------|---------------|---------------|
| Africa | 96,248 | 86,414 |
| Egypt | 15,299 | 15,914 |
| Algeria | 10,824 | 10,075 |
| Nigeria | 18,981 | 6,901 |
| South Africa | 6,354 | 6,765 |
| Morocco | 6,393 | 6,273 |
| Angola | 3,756 | 3,858 |
| Libya | 2,408 | 3,618 |
| Tunisia | 3,676 | 2,937 |
| Sudan | 2,193 | 1,987 |
| Kenya | 2,026 | 1,885 |

Agr imports by sector

| Imports | 2011 | 2012 |
|----------------------------|--------------|--------------|
| Agriculture | 96,248 | 86,414 |
| agriculture % total | 16.8% | 15.3% |
| Cereals | 27,400 | 25,390 |
| Fats and oils | 10,468 | 8,913 |
| Sugars | 7,892 | 7,083 |
| Dairy | 6,365 | 5,180 |
| Meat | 3,848 | 4,712 |
| Residues | 3,067 | 3,571 |
| Beverages | 2,878 | 3,463 |
| Cotton | 3,801 | 3,384 |
| Cereal products | 7,174 | 2,879 |
| Tobacco | 2,590 | 2,709 |





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- Look at South Africa

RSA Agr Exports - % shares

| Destination | 1996 | 2007 | 2013 |
|-------------------------|--------------|--------------|--------------|
| World \$ MILLION | 2,590 | 4,459 | 7,613 |
| EU | 35.8% | 43.2% | 31.3% |
| Africa | 22.0% | 20.0% | 29.5% |
| SADC | 18.5% | 13.2% | 22.9% |
| TFTA | 22.0% | 16.4% | 25.8% |
| Asean | 3.9% | 3.0% | 4.0% |
| BRIC | 4.8% | 5.5% | 7.8% |
| EAC | 1.6% | 2.2% | 1.8% |
| Mercosur | 3.7% | 0.4% | 0.3% |
| USA | 3.8% | 5.4% | 3.6% |
| Zimbabwe | 2.1% | 1.4% | 7.9% |
| Mozambique | 4.8% | 4.4% | 5.9% |
| Japan | 8.7% | 6.2% | 4.7% |
| China | 0.4% | 2.5% | 4.4% |
| Angola | 6.3% | 3.4% | 3.9% |
| UAE | 0.8% | 2.5% | 3.0% |
| Zambia | 1.7% | 1.4% | 2.9% |

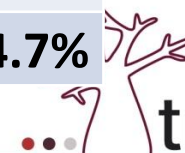
Agr exports at HS 6 - % shares

| | | 1996 | 2007 | 2013 |
|---------------|------------------|-------|-------|-------|
| HS | Description/ all | 2,590 | 4,459 | 7,613 |
| 080510 | Oranges | 4.3% | 8.9% | 7.5% |
| 100590 | Maize | 10.8% | 0.3% | 7.4% |
| 220421 | Wine | 4.3% | 11.7% | 6.3% |
| 080610 | Grapes | 4.5% | 6.9% | 6.0% |
| 080810 | Apples | 3.5% | 4.7% | 5.6% |
| 220429 | Wine | 0.8% | 3.1% | 4.1% |
| 510111 | Wool | 2.0% | 3.3% | 3.8% |
| 080830 | Pears | 0.0% | 0.0% | 2.6% |
| 170199 | Sugar | 2.8% | 1.7% | 2.1% |
| 210690 | Food Nesoi | 0.6% | 1.6% | 1.7% |
| 080550 | Lemons | 0.0% | 1.2% | 1.7% |
| 080520 | Mandarins | 0.2% | 1.4% | 1.6% |
| 170114 | Sugar | 0.0% | 0.0% | 1.6% |

Oranges

080510, Oranges \$ million

| Partner | 1996 | 2013 |
|---------|----------|-------|
| World | 112 | 569 |
| EU | 70 | 215 |
| BRIC | 5 | 78 |
| Africa | 2 | 22 |
| USA | 0 | 27 |
| | % shares | |
| EU | 62.5% | 37.8% |
| BRIC | 4.5% | 13.7% |
| Africa | 1.8% | 3.9% |
| USA | 0.0% | 4.7% |



Maize (Corn)

| 100590, Corn \$ million | | |
|-------------------------|----------|-------|
| Partner | 1996 | 2013 |
| World | 279 | 564 |
| Africa | 22 | 100 |
| EU | 8 | 21 |
| BRIC | 2 | 1 |
| USA | 0 | 0 |
| | % shares | |
| Africa | 7.9% | 17.7% |
| EU | 2.9% | 3.7% |
| total | 11% | 22% |

Wine (bottles)

| 220421, Wine Not Over 2 Litres -\$ million | | |
|---|--------------------------------|--------------|
| Partner | 1996 | 2013 |
| World | 110 | 479 |
| EU | 80 | 278 |
| Africa | 7 | 41 |
| BRIC | 0 | 28 |
| USA | 5 | 43 |
| | % shares to each market | |
| EU | 72.7% | 58.0% |
| Africa | 6.4% | 8.6% |
| BRIC | 0.0% | 5.8% |
| USA | 4.5% | 9.0% |

Apples

| 080810, Apples | | |
|----------------|--------------|--------------|
| Partner | 1996 | 2013 |
| World | 92 | 424 |
| EU | 65 | 155 |
| Africa | 10 | 139 |
| | % shares | |
| EU | 70.7% | 36.6% |
| Africa | 10.9% | 32.8% |
| BRIC | 3.3% | 1.9% |

RSA to Africa Agr products

| South Africa Agr Export To Africa | | | | | |
|-----------------------------------|----------------------|------------|------------|-------------|--|
| Product \$ mill /Year | | 2001 | 2007 | 2013 | |
| WTO Agriculture | | 590 | 891 | 2243 | |
| 170199 | Sugar | 47 | 71 | 150 | |
| 080810 | Apples | 12 | 42 | 139 | |
| 210690 | Food Preps | 21 | 57 | 109 | |
| 100590 | Maize | 22 | 9 | 100 | |
| 110313 | Groats | 2 | 4 | 64 | |
| 150790 | Soybean Oil | 1 | 0 | 58 | |
| 240220 | Cigarettes | 70 | 51 | 57 | |
| 110100 | Wheat | 10 | 1 | 54 | |
| 220710 | Ethyl Alcohol | 15 | 28 | 45 | |
| 220870 | Liqueurs | 1 | 9 | 44 | |
| 230990 | Animal Feed | 2 | 7 | 43 | |
| 210410 | Soups etc | 1 | 15 | 42 | |



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RSA AGR IMPORTS (BRIC / Mercosur double)

| Source/Yr | 1996 | 2007 | 2013 |
|-----------|-------|-------|-------|
| World \$m | 1830 | 4366 | 6001 |
| Africa | 10.3% | 6.4% | 5.7% |
| EU | 24.5% | 23.2% | 31.5% |
| BRIC | 6.4% | 17.4% | 22.5% |
| USA | 17.2% | 7.3% | 4.7% |
| Mercosur | 13.3% | 29.6% | 18.7% |
| Asean | 12.0% | 14.6% | 14.1% |
| SADC | 6.3% | 5.2% | 4.5% |
| Brazil | 2.2% | 9.2% | 8.1% |
| China | 1.4% | 4.3% | 7.9% |
| Argentina | 10.7% | 19.7% | 9.7% |
| India | 2.8% | 3.9% | 5.2% |



Imports by HS 6 lines

| | Description/Yr | 1996 | 2007 | 2013 |
|---------------|----------------------|-------------|-------------|--------------|
| HS 6 | Total \$m | 1830 | 4366 | 6001 |
| 100630 | Rice | 7.5% | 6.7% | 10.6% |
| 100199 | Wheat | 7.9% | 5.9% | 6.4% |
| 230400 | Soybean cake | 3.6% | 4.8% | 5.5% |
| 151190 | Palm Oil | 2.8% | 4.5% | 5.1% |
| 220830 | Whiskies | 4.0% | 4.9% | 4.7% |
| 020714 | Chicken Cuts | 1.3% | 4.0% | 4.5% |
| 210690 | Food Preps | 1.7% | 3.1% | 2.9% |
| 150790 | Soybean Oil | 0.1% | 2.2% | 2.8% |
| 170199 | Sugar | 0.0% | 0.1% | 2.4% |
| 151211 | Sunflower Oil | 4.0% | 2.6% | 2.3% |
| 020712 | Chicken offal | 0.0% | 0.4% | 1.4% |

