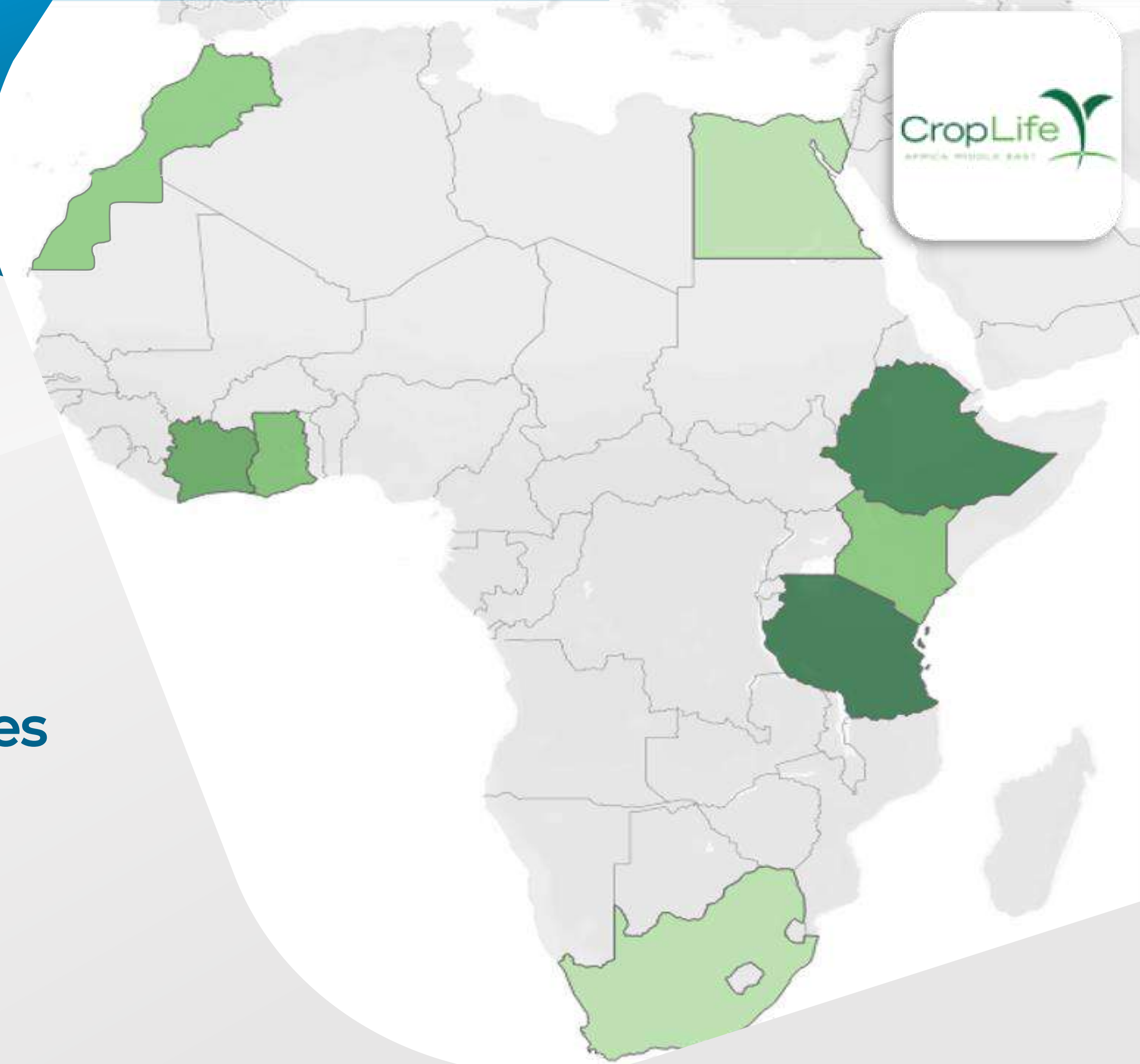
The State of Play of Africa Agricultural Trade
Insights from Eight AME Countries



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Outline of the presentation

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2. Macroeconomic and agricultural trade profile of the AME countries
3. Trade agreements
4. Selection of the top two export products
5. Trade and barriers to the exported products
6. Value addition in the importing market
7. Alternative market opportunities and competition
8. Conclusion and key points

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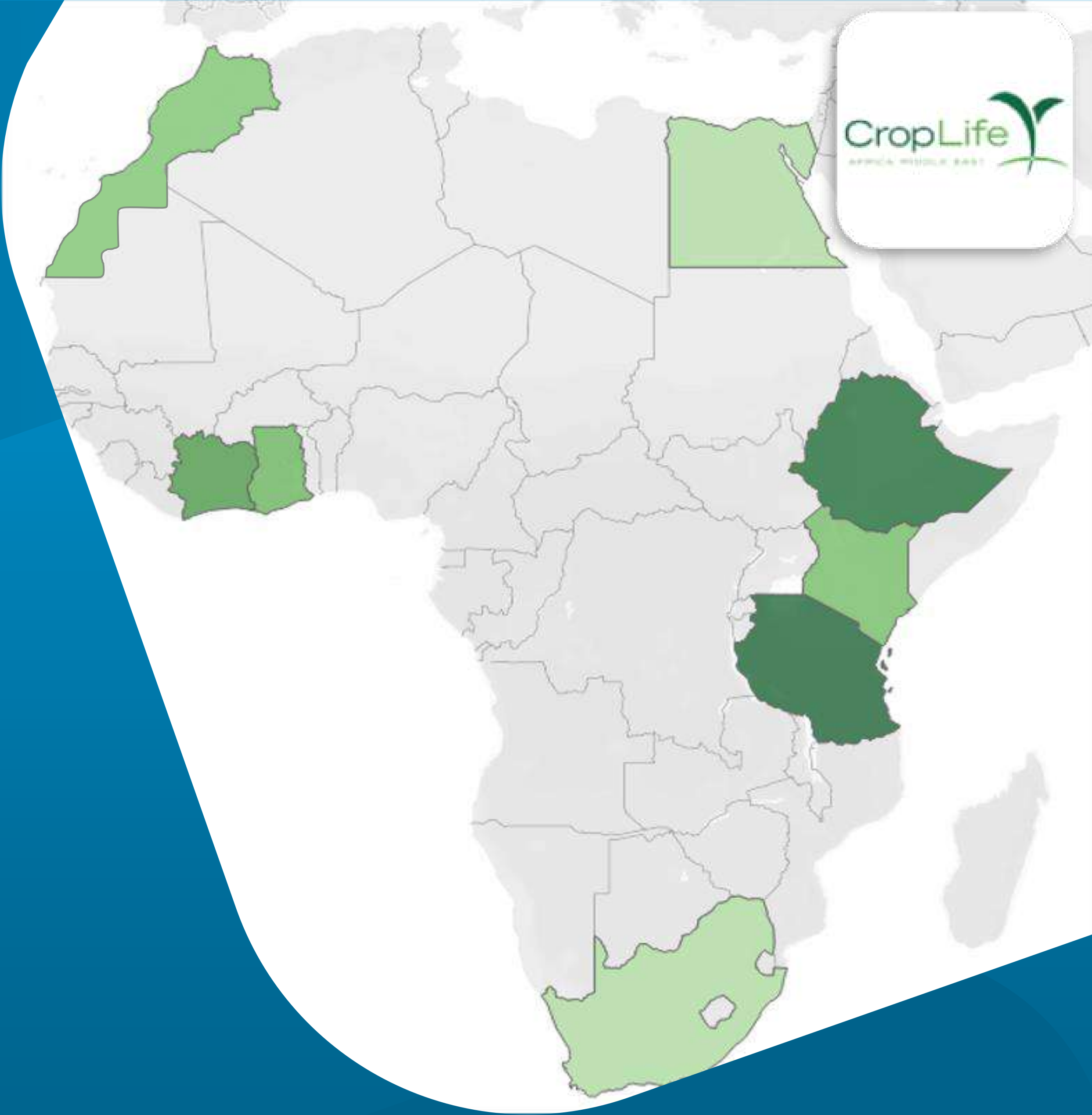
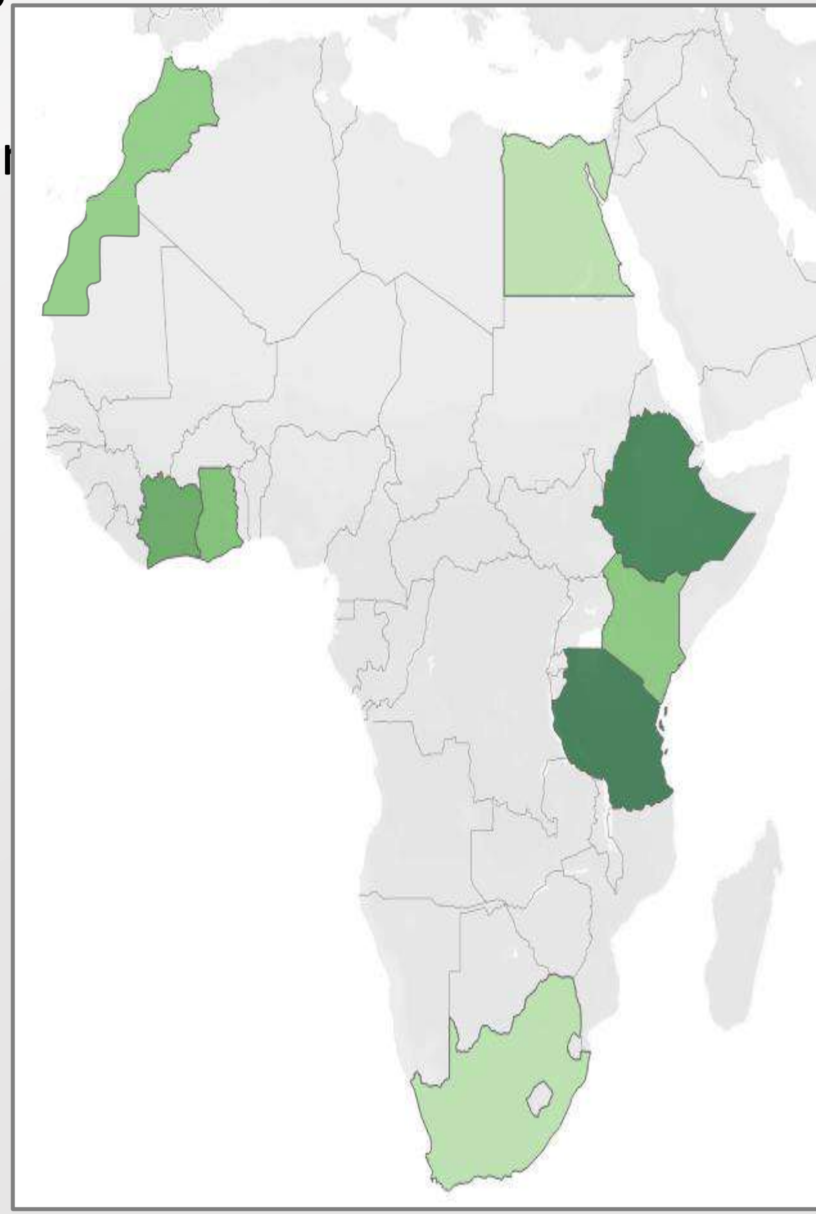
Introduction & background



Background

- The US introduced a variety of tariffs early in 2025, while the EU intensified regulatory requirements over time
- The study covers eight countries representing four African regio
    - **South Africa** in the Southern region,
    - **Ethiopia**, **Kenya** and **Tanzania** in the East,
    - **Côte'd Ivoire** and **Ghana** in the West and
    - **Egypt** and **Morocco** in the North.



The triggers are the latest policy changes and potential impact:

- the US trade and tariff policy reforms,
- the EU's regulations (Green Deal → Vision for Agriculture and
- AfCFTA – intra-Africa trade and its potential.

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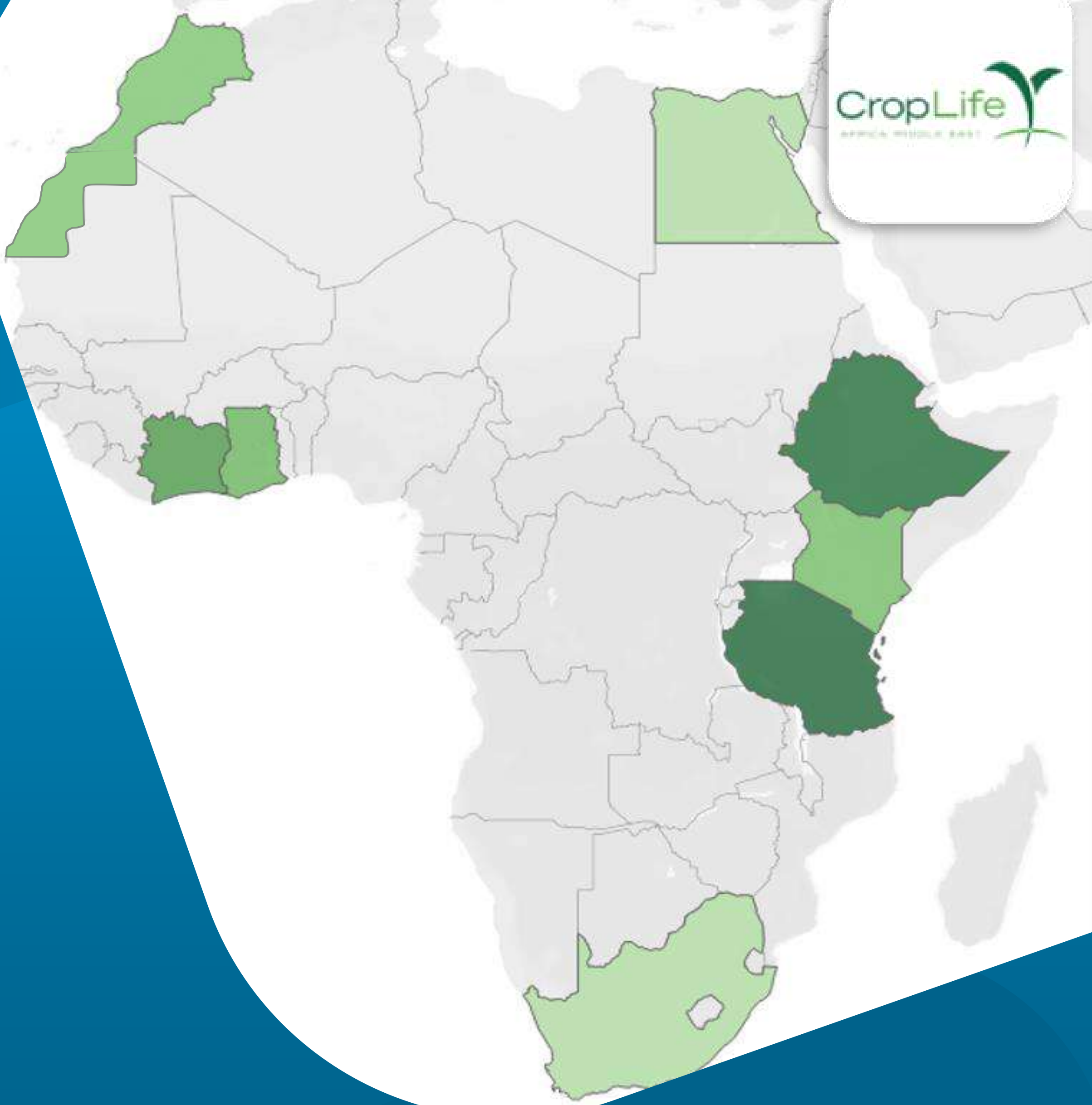
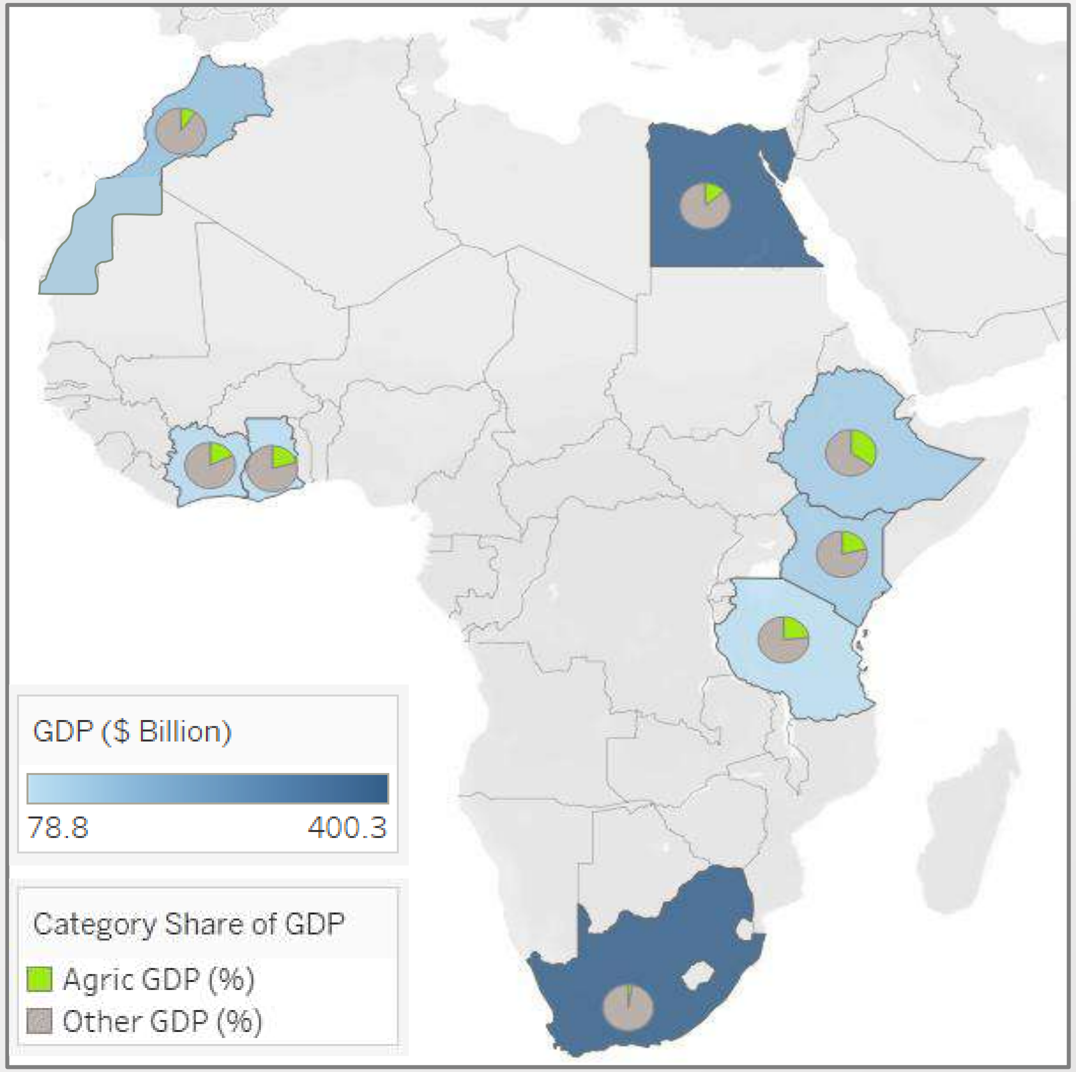
Macroeconomic and trade profile of AME countries

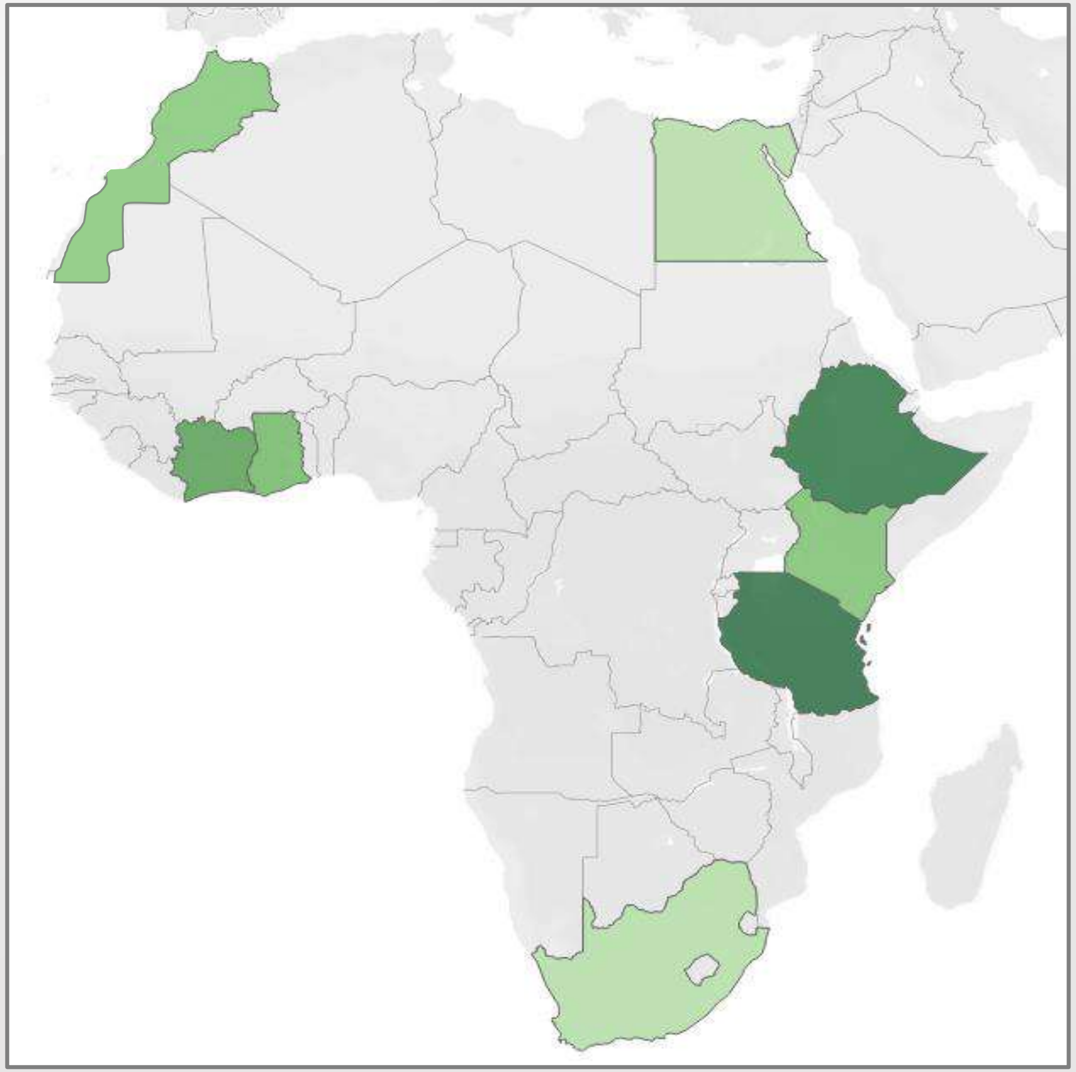


Country overview of GDP and agricultural employment

Biggest economies: South Africa & Egypt
Biggest agric share of economy: Ethiopia & Tanzania

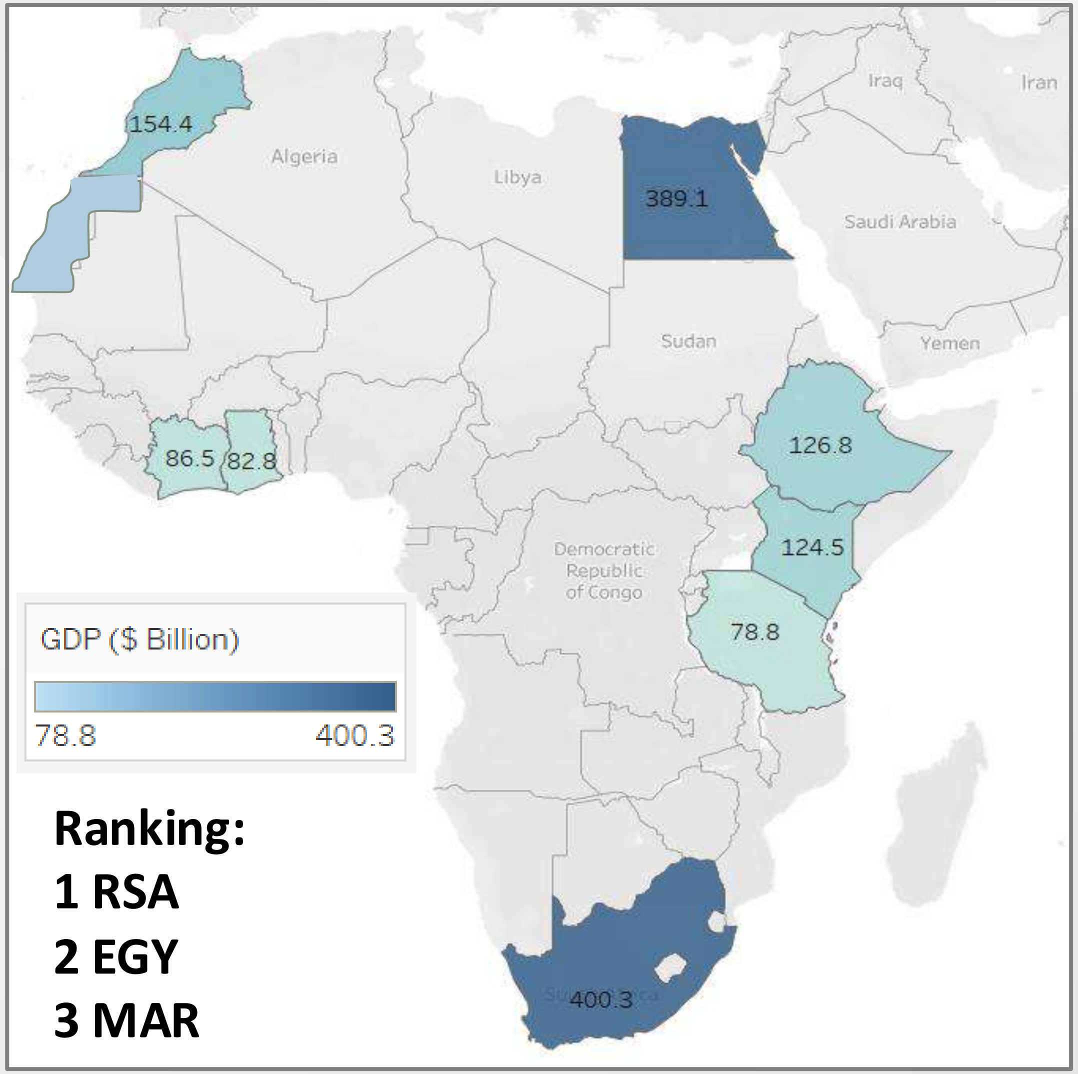
Linked to agric share of economy, agriculture is a **major contributor to employment** in ETH & TZA





Trade flow patterns – Exports from AME countries

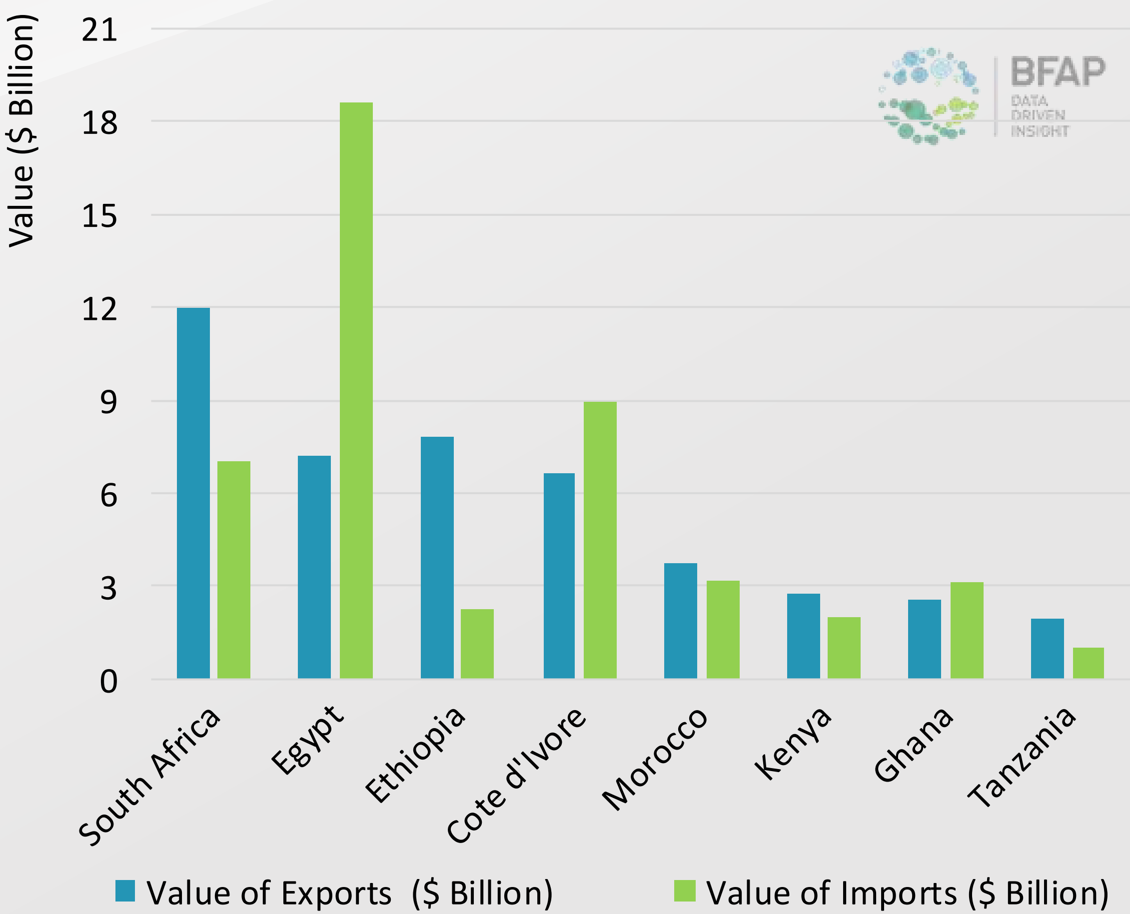
Average GDP: 2019 - 2023



Ranking:
1 RSA
2 EGY
3 MAR

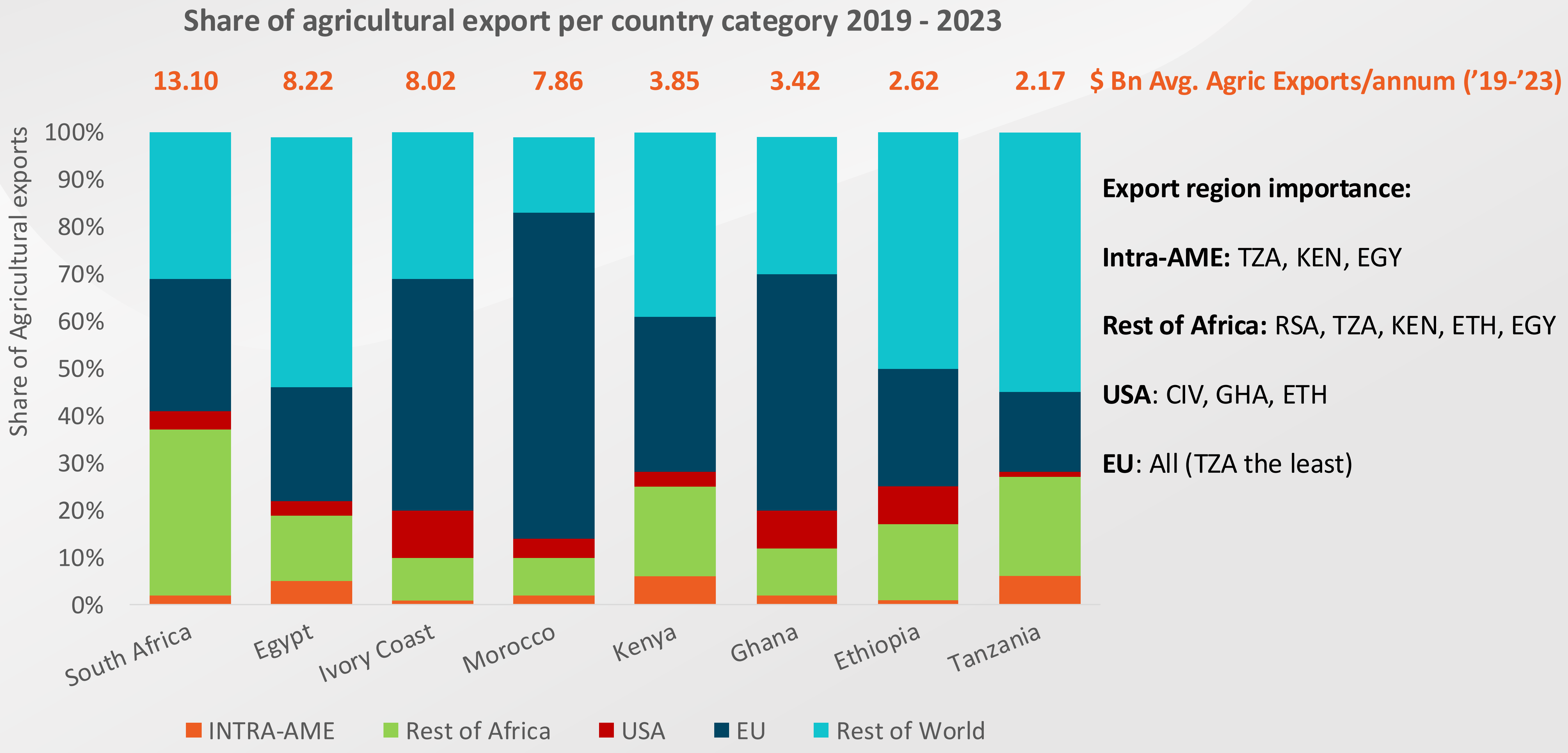
Net exporters: RSA, ETH, MAR, KEN, TZA
Net importers: EGY, CIV, GHA

Trade per country: 2019 - 2023



Trade flow patterns – Exports from AME countries

AME Country exports average 2019 – 2023



Export region importance:

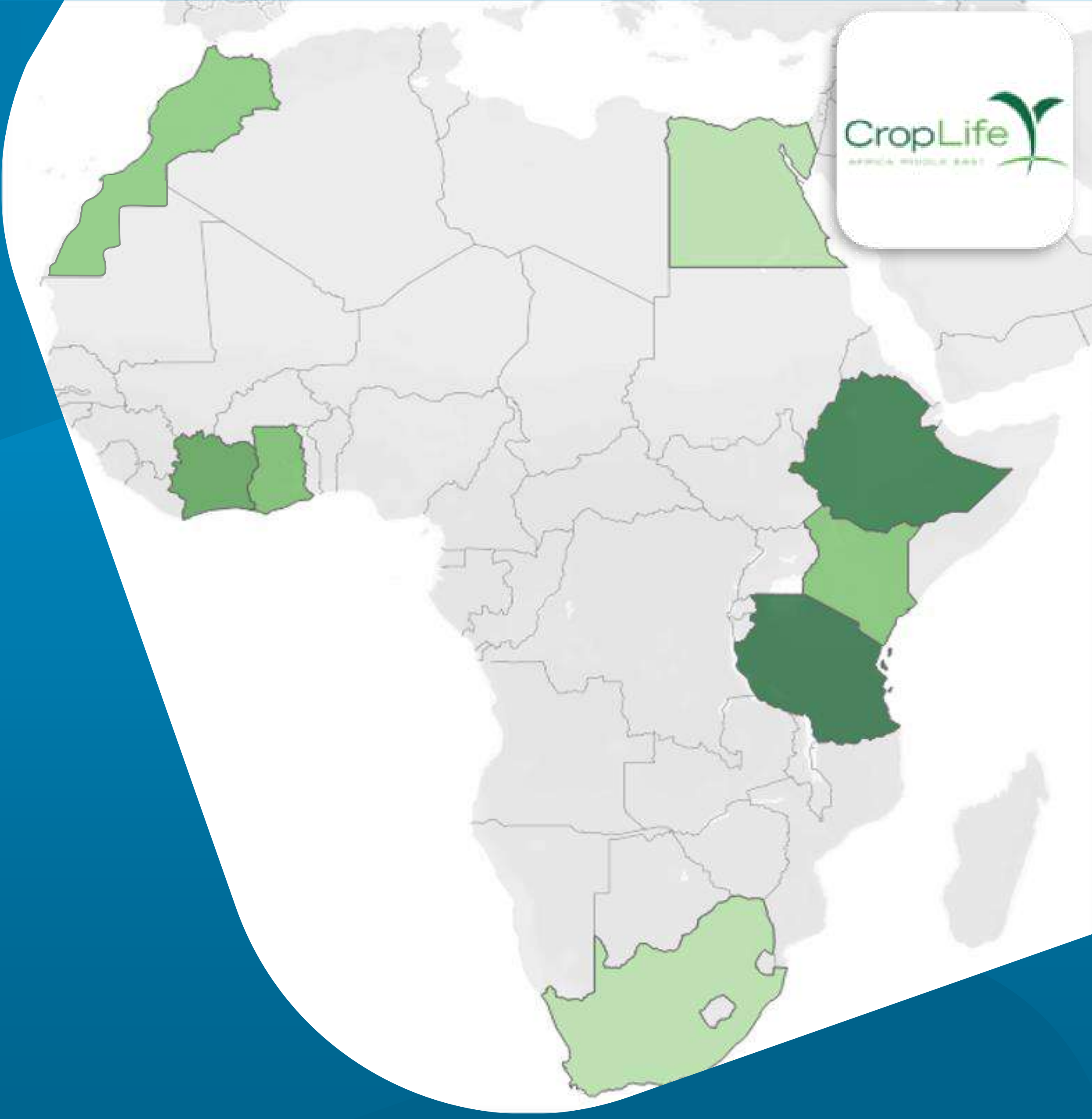
Intra-AME: TZA, KEN, EGY

Rest of Africa: RSA, TZA, KEN, ETH, EGY

USA: CIV, GHA, ETH

EU: All (TZA the least)

Trade agreements



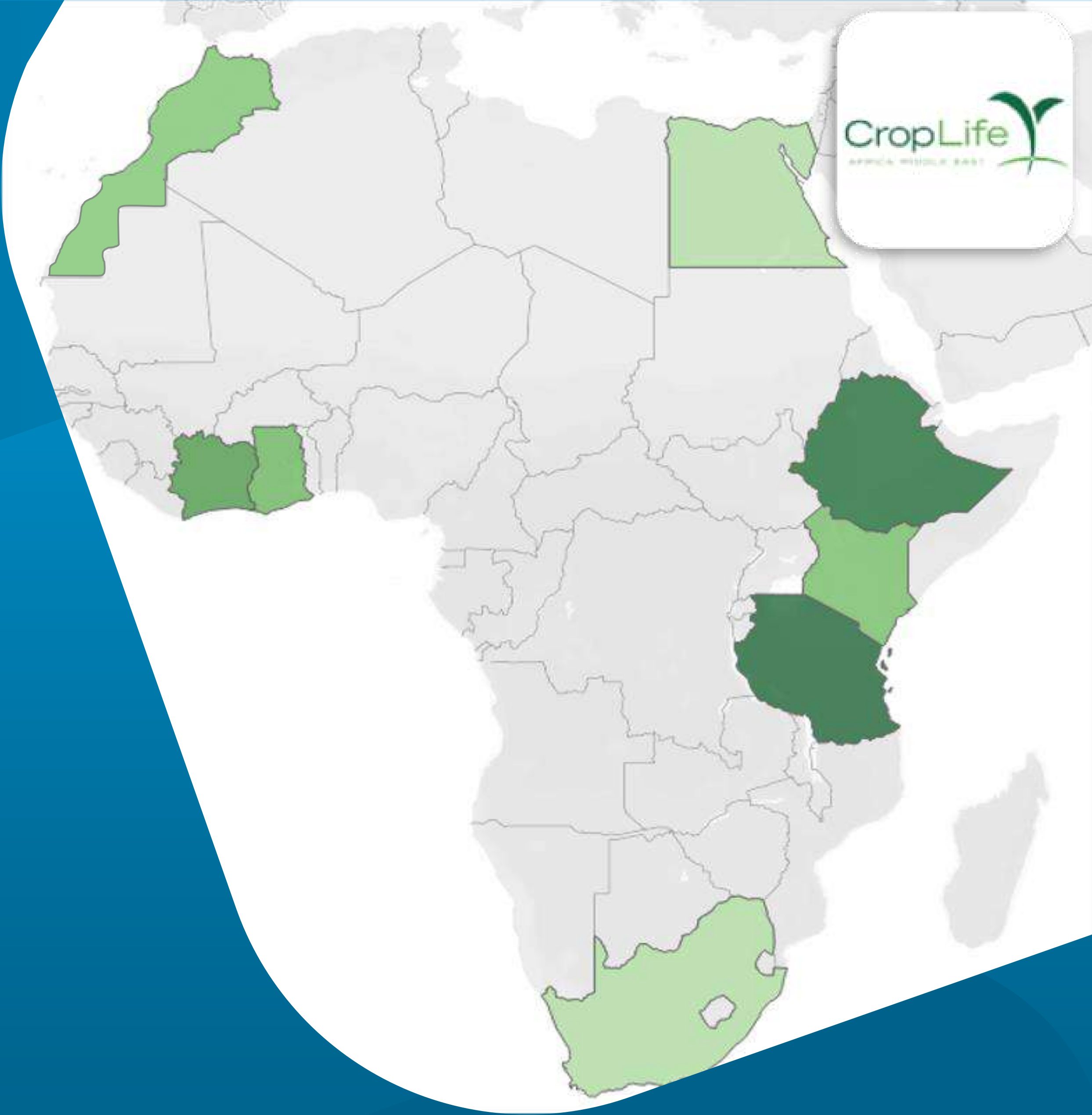
Trade agreements – AME countries with USA, EU, Africa and Rest of the World

- ALL countries have agreements with the EU except **Ethiopia and Tanzania**.
- **Ethiopia** lost its AGOA eligibility status, while **Egypt and Morocco** were excluded from the inception.
- Ethiopia is the only country that has not **acceded to the WTO**.
- Egypt, Morocco and South Africa have the **most trade agreements**.

AME member	USA	EU	Africa	Rest of the World
Côte d'Ivoire	AGOA (2000)	EU-Cote'd Ivore	**ECOWAS (1993)** AfCFTA (2019) WAEMU	UK – Cote d'Ivoire GSP (1971)
Egypt	GSP (1976)	EU-FTA (2004)	**COMESA (1994)** Agadir (2007) AfCFTA (2019)	EFTA – Egypt Egypt – Türkiye PAFTA MERCOSUR UK GSP (1976)
Ethiopia	GSP (1971)	EU-LDCs (1971)	AfCFTA (2019) **COMESA** (1994)	GSP (1971) DCTS -UK (2023)
Ghana	AGOA (2000)	EU-Ghana	**ECOWAS** (1993) AfCFTA (2019)	GSP (1971) UK – Ghana

AME member	USA	EU	Africa	Rest of the World
Kenya	AGOA (2000)	EU-EAC EPA (2024)	**COMESA** (1994) **EAC** (2009) AfCFTA (2019)	UK – Kenya GSP (1971)
Morocco	US-FTA (2006)	EU-Morocco (2000)	AfCFTA (2019) Agadir (2007)	EFTA – Morocco GSP (1971) Morocco – UAE PAFTA Türkiye – Morocco UK – Morocco
South Africa	AGOA (2000)	SADC-EPA (2016)	AfCFTA (2019) **SADC**(2000) SACU (2006)	EFTA – SACU (2008) MERCOSUR-SACU (2008) UK– SACUM (2021) GSP (1971)
Tanzania	AGOA (2000)	GSP (1971)	**EAC (2009)** AfCFTA (2019) **SADC** (2000)	GSP (1971) DCTS-UK (2023)

Top two export product



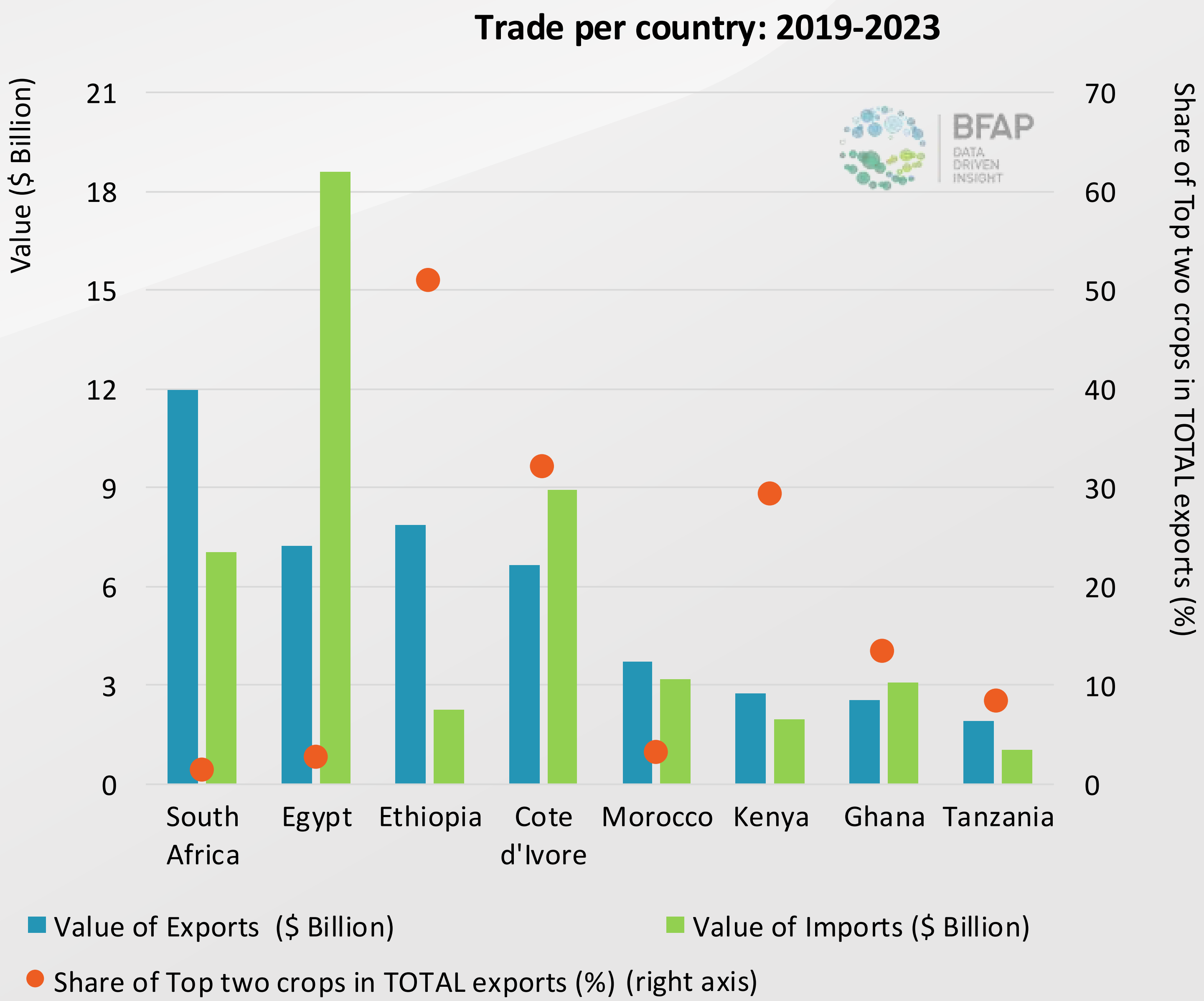
Top two export product

Average trade values,
from 2015 –2023
RCA for all products

Importance of the top two crops in national exports

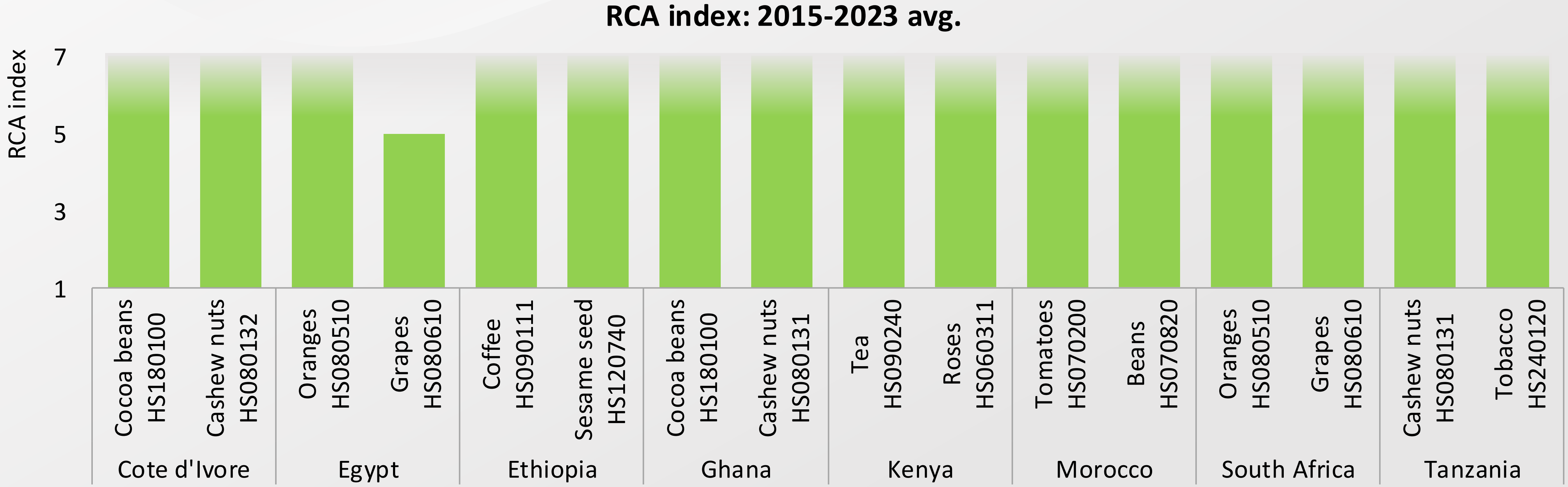
- **Net exporters**: RSA, ETH, MAR, KEN, TZA
- **Net importers**: EGY, CIV, GHA

- The top two exported crops account for at least 30% of total exports in Ethiopia, Côte d' Côte d'Ivoire and Kenya.
- These countries are therefore more likely to be affected by the changing trade environments due to lack of product diversification.
- South Africa, Egypt and Morocco rely relatively less on the exports of the two products.



Competitiveness of the top two crops in global terms

Definition of revealed comparative advantage (RCA):	The ability of a nation to produce a good at a **lower relative opportunity cost than its competitors**, allowing it to **specialise** and potentially **achieve greater efficiency** and profit margins.
What the RCA measures:	The country exports of the product relatively to the rest of the world for that same product within the context of the country's total trade and total global trade.
What the RCA indicates (RCA score: 1 < RCA < infinity):	The score for competitiveness ranges from one (1) to positive infinity. The absence of competitiveness, i.e., a comparative disadvantage, is any index value below one (1).



RCA > 1: In all instances, the top two agricultural exports had a comparative export advantage!

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Trade flows and barriers to trade for the top two products

Trade flows of top-exported products

- The **EU is the main market** for most of these top exports.
- The third market has **generally higher share of exports than the US.**
- The **UK and Asia countries** serve as an alternative market to the US, in most cases.

AME Country	Product	Export value, $ million	Partner export share (%)				
			EU	US	3rd Market	3rd Market Partner	Rest of World
Cote d'Ivoire	Cocoa beans	3 543	59.5%	8.1%	**10.5%**	Malaysia	21.9%
	Cashew nuts	889	9.2%	3.5%	4.5%	Vietnam	82.8%
Egypt	Oranges	645	22.3%	0.1%	**28.3%**	Russia	49.3%
	Grapes	251	43.7%	0.1%	**22.3%**	UK	34.0%
Ethiopia	Coffee	1 013	36.5%	15.0%	17.0%	Saudi Arabia	31.6%
	Sesame seeds	321	1.5%	0.4%	25.3%	Israel	72.9%
Ghana	Cocoa beans	1 788	12.6%	8.3%	9.5%	Malaysia	69.7%
	Cashew nuts	357	1.3%	0.7%	**33.1%**	India	64.9%
Kenya	Tea	1 268	3.0%	0.4%	**41.3%**	Pakistan	55.3%
	Roses	468	53.7%	0.2%	17.7%	UK	28.4%
Morocco	Tomatoes	1 551	49.0%	0.1%	11.5%	UK	39.6%
	Beans	255	91.5%	0.1%	4.8%	UK	3.8%
South Africa	Oranges	736	47.8%	4.0%	**21.4%**	UK	27.0%
	Grapes	596	43.1%	18.6%	**24.8%**	UAE	13.5%
Tanzania	Cashew nuts	282	1.7%	0.2%	**54.0%**	Vietnam	44.2%
	Tobacco	233	545.0%	0.8%	9.1%	UAE	35.2%

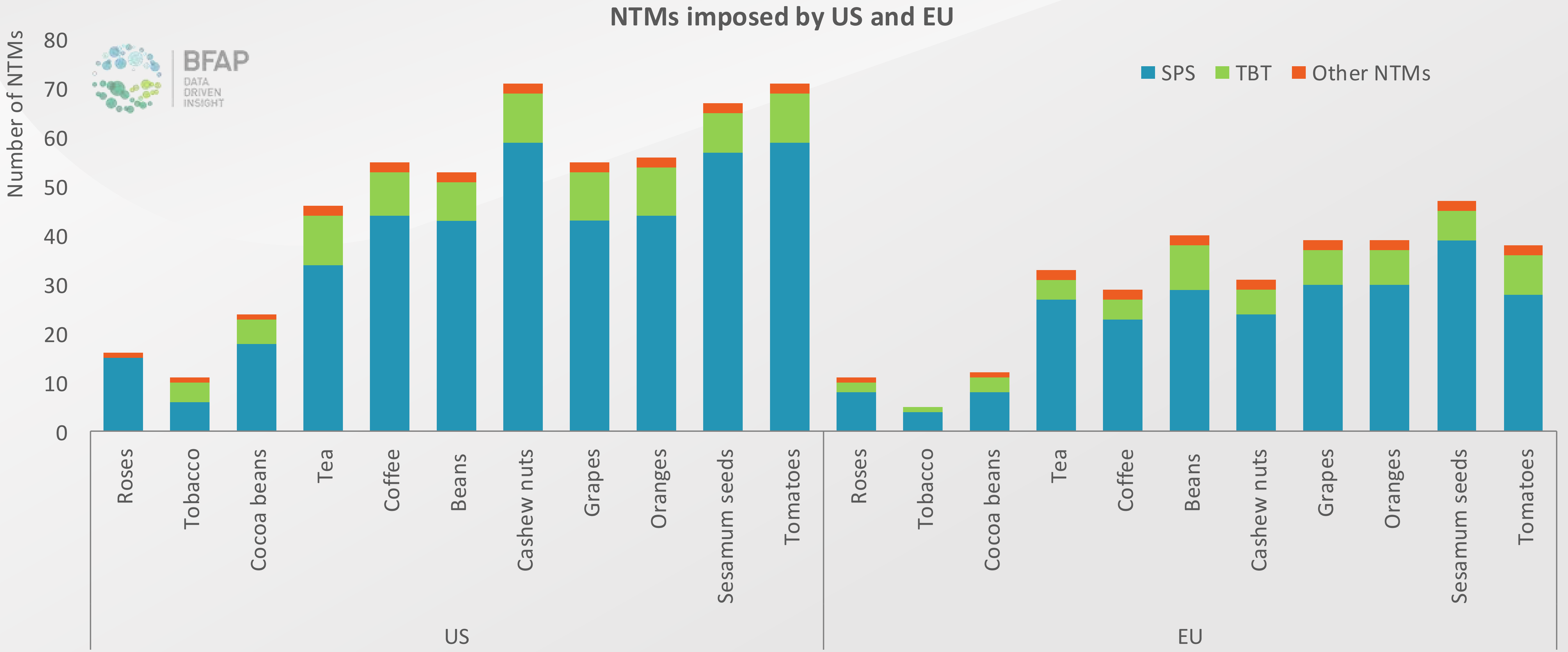
Tariffs for exported products in the US and the EU

Country	Product	US Average tariff (%)			EU Average tariff (%)		
		2015-24	2015-19	2020-24	2015-24	2015-19	2020-24
Cote d'Ivoire	Cocoa beans	3%	3%	3%	0%	0%	0%
	Cashew nuts	0%	0%	0%	**35%**	**35%**	**35%**
Egypt	Oranges	1.27%	1.27%	1.27%	**60%**	**60%**	**60%**
	Grapes	2.7%	2.7%	2.7%	11%	11%	11%
Ethiopia	Coffee	3%	3%	3%	6%	6%	**5%**
	Sesame seeds	**7%**	**7%**	**6%**	0%	0%	0%
Ghana	Cocoa beans	3%	3%	3%	0%	0%	0%
	Cashew nuts	0%	0%	0%	0%	0%	0%
Kenya	Tea	0%	0%	0%	0%	0%	0%
	Roses	0%	0%	0%	0%	0%	0%
Morocco	Tomatoes	0%	0%	0%	**60%**	**60%**	**60%**
	Beans	0%	0%	0%	**60%**	**60%**	**60%**
South Africa	Oranges	0%	0%	0%	0%	0%	0%
	Grapes	0%	0%	0%	0%	0%	0%
Tanzania	Cashew nuts	0%	0%	0%	0%	0%	0%
	Tobacco	0%	0%	0%	**18%**	**18%**	**18%**

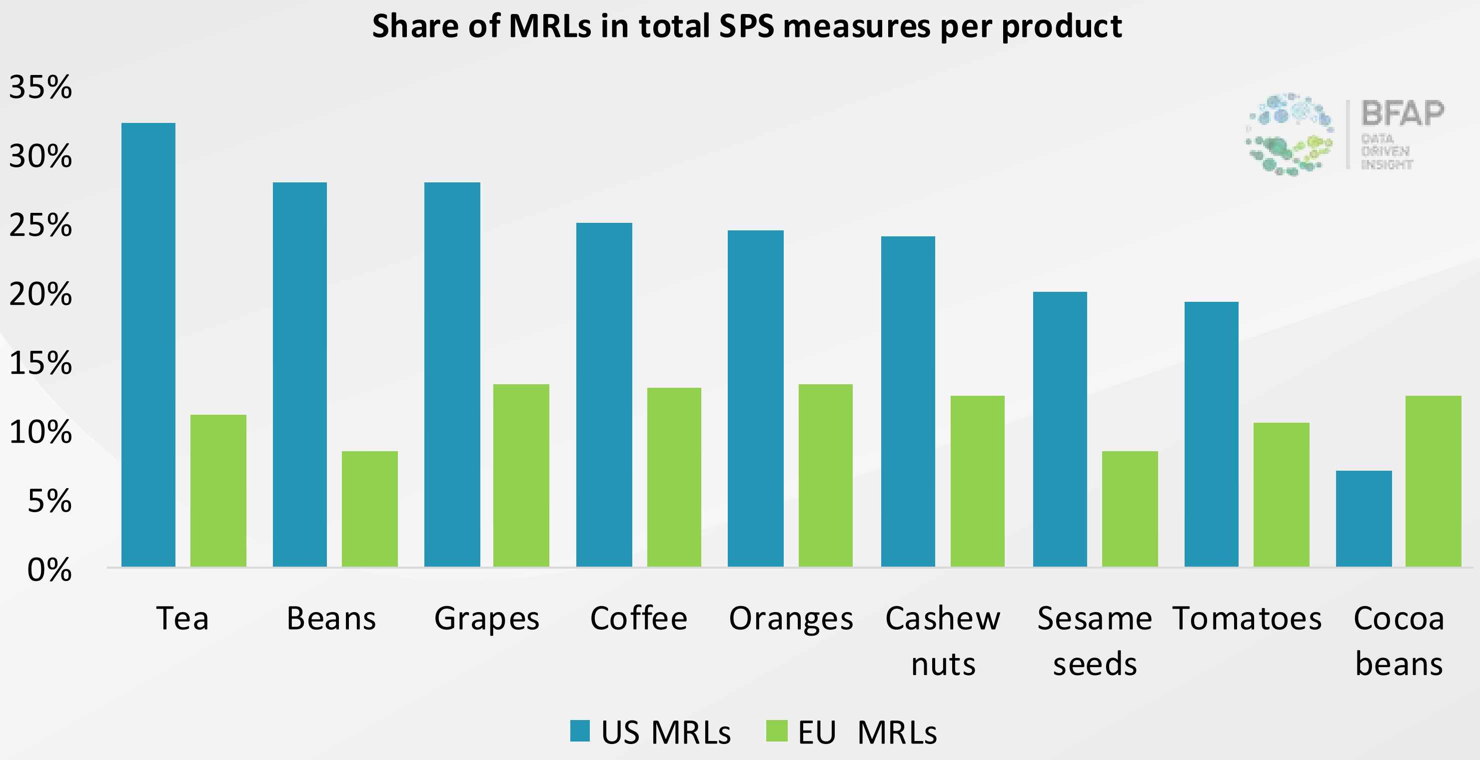
- Tariffs in the EU and the US have not changed much in the last decade for the top products.
- The EU applies **tariff escalation** on Cashew nuts from Cote 'Ivoire, with a tariff of 35% because they are shelled. Those from Ghana and Tanzania are eligible for duty-free entry.
- Products from Egypt and Morocco face **seasonal tariffs** in the EU of up to 60%.
- High tariffs on tobacco are due to **public health policies**.

AME products are more affected by NTMs in the US than in the EU

- Although NTMs to the US is more, because more products are destined for the EU, their **regulations are deemed to be restrictive**.
- The EFSA standards are generally set **above the international benchmarks**, such as those of Codex Alimentarius and others.



MRL comparisons between the EU and US

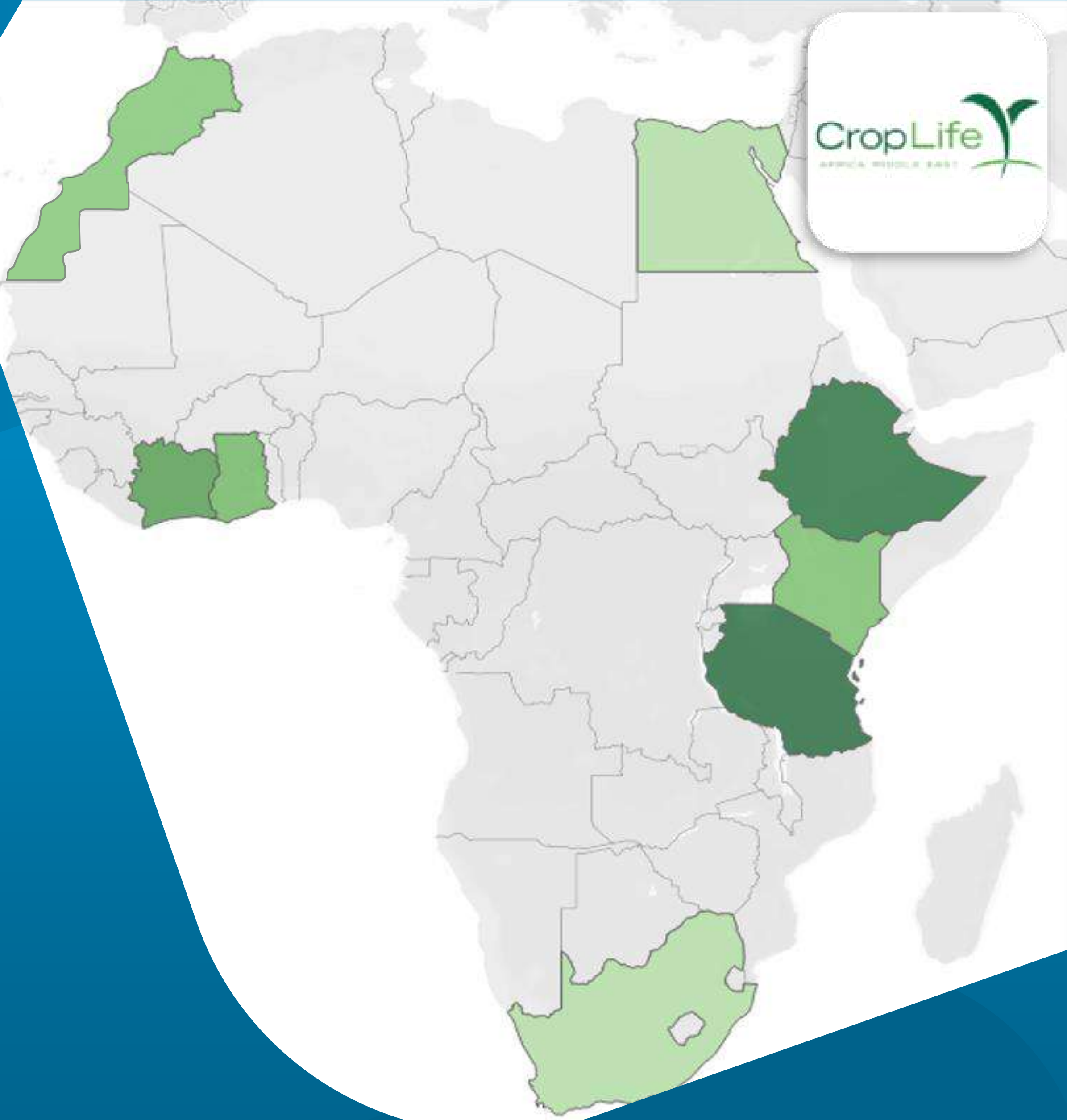


MRLs for Acetamiprid by the EU, US and recommended Codex Alimentarius levels, in mg/kg

Products	EU	US	Codex
Oranges	0.90	1.00	0.50
Cashew nuts	0.07	0.10	0.06
Table grapes	0.08	0.35	0.50
Tomatoes	0.06	0.20	0.20
Green Beans	0.60	0.60	0.40
Sesame seeds	0.01	2.00	N/A
Tea	0.05	50.0	N/A
Coffee beans	0.05	N/A	N/A
Cocoa beans	0.05	N/A	N/A

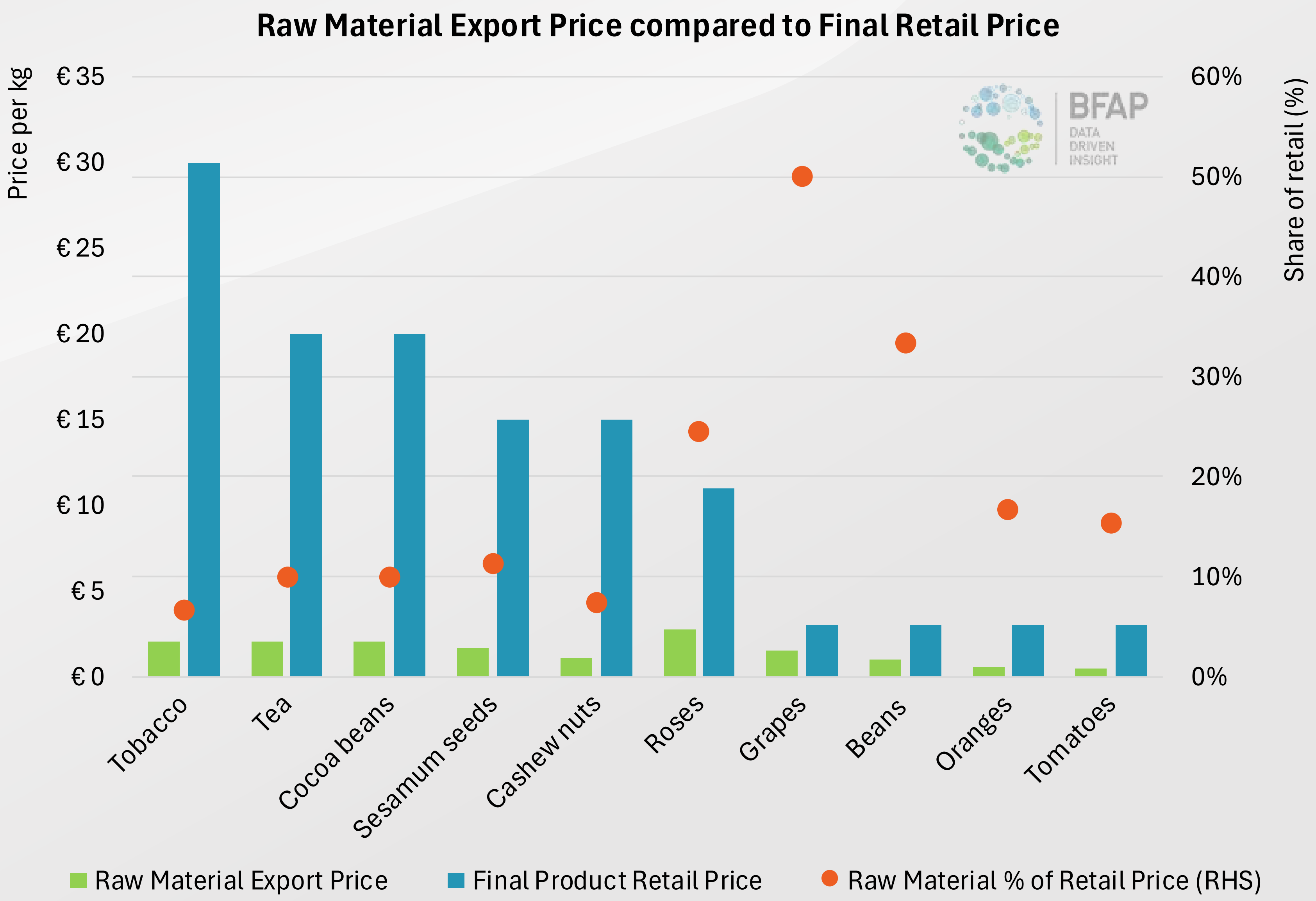
- The US MRLs constitute a relatively high percentage of plant protection and food safety measures, i.e., in food products, compared to the EU.
- On the other hand, the EU has stricter MRL standards for Acetamiprid compared to the US and Codex Alimentarius.
- MRLs for Acetamiprid by the EU, US and recommended Codex Alimentarius levels, in mg/kg.

Value adding in the importing market



Value adding in the market may lead to value disparities

- The importer of the raw materials adds value through processing, branding or packaging.
- For example, Cocoa beans enter the EU at a value of around €2–€4/kg, retails at €20–€60/kg.
- So, **less than 10%** of the final value retained by producers.
- Coffee, tea, and roses show similar patterns.
- Domestic processing can be restricted by **tariff escalation, processing capacity and proximity to consumers**.



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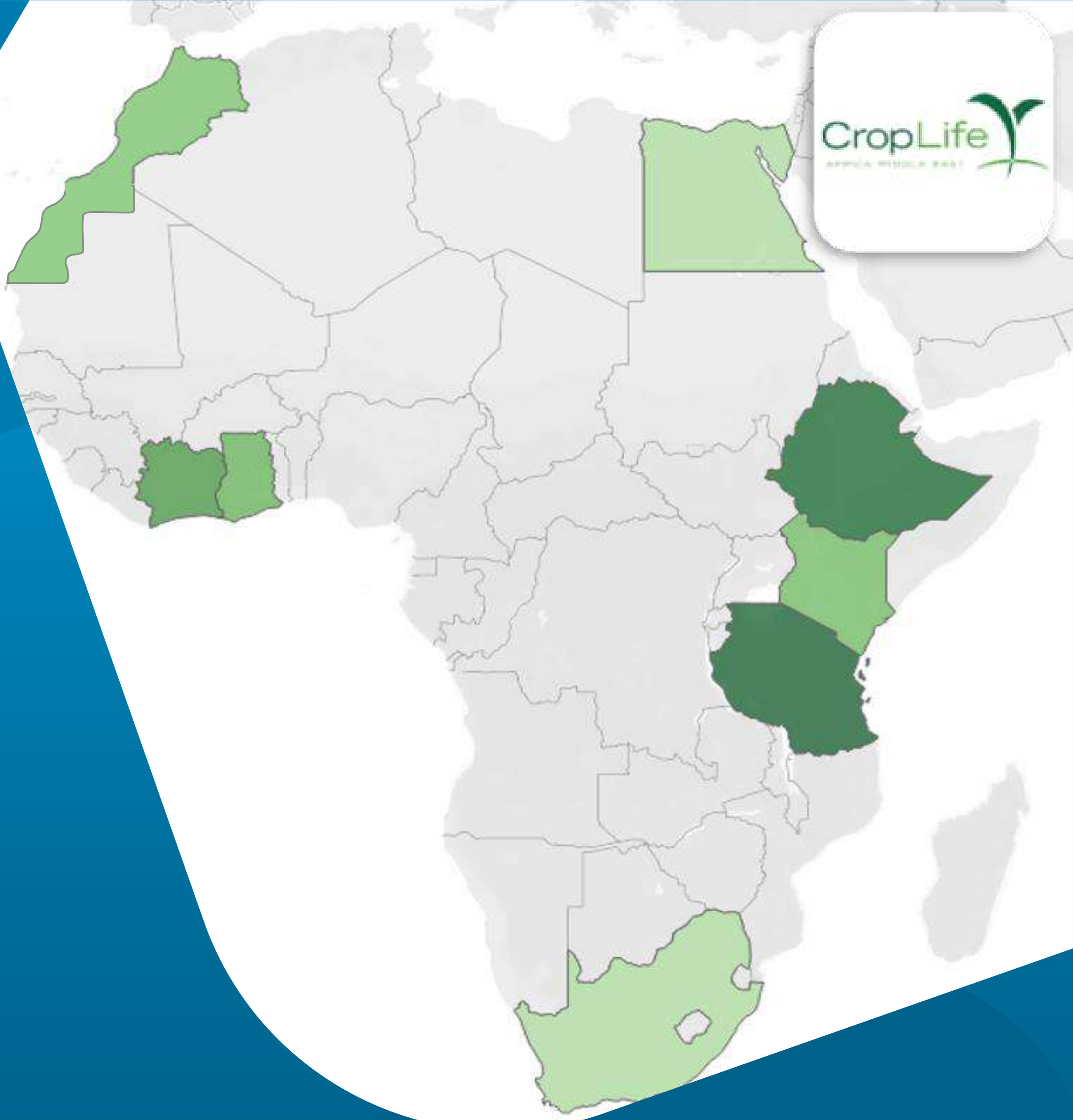
Alternative markets & Competition



South American & Asia countries are the main competitors

	Competitors			Market opportunities		
Product	**1st**	**2nd**	**3rd**	**1st**	**2nd**	**3rd**
Tobacco	Brazil	Dominican Republic	India	China	Indonesia	UAE
Tea	India	Argentina	Sri Lanka	Pakistan	UAE	UK
Cocoa beans	Ecuador	Dominican Republic	Peru	Indonesia	Singapore	Turkey
Coffee	Brazil	Columbia	Vietnam	Japan	Switzerland	Canada
Sesamum seeds	India	Guatemala	Pakistan	China	Turkey	Japan
Cashew nuts	Vietnam	Brazil	Thailand	China	Turkey	UK
Roses	Ecuador	Columbia	Guatemala	Saudi Arabia	Switzerland	Canada
Grapes	Chile	Peru	Brazil	UK	Canada	Indonesia
Beans	Mexico	Guatemala	Canada	UK	Singapore	Switzerland
Oranges	Chile	Mexico	Australia	Russia	Canada	Saudi Arabia
Tomatoes	Mexico	Canada	Guatemala	UK	Canada	Russia

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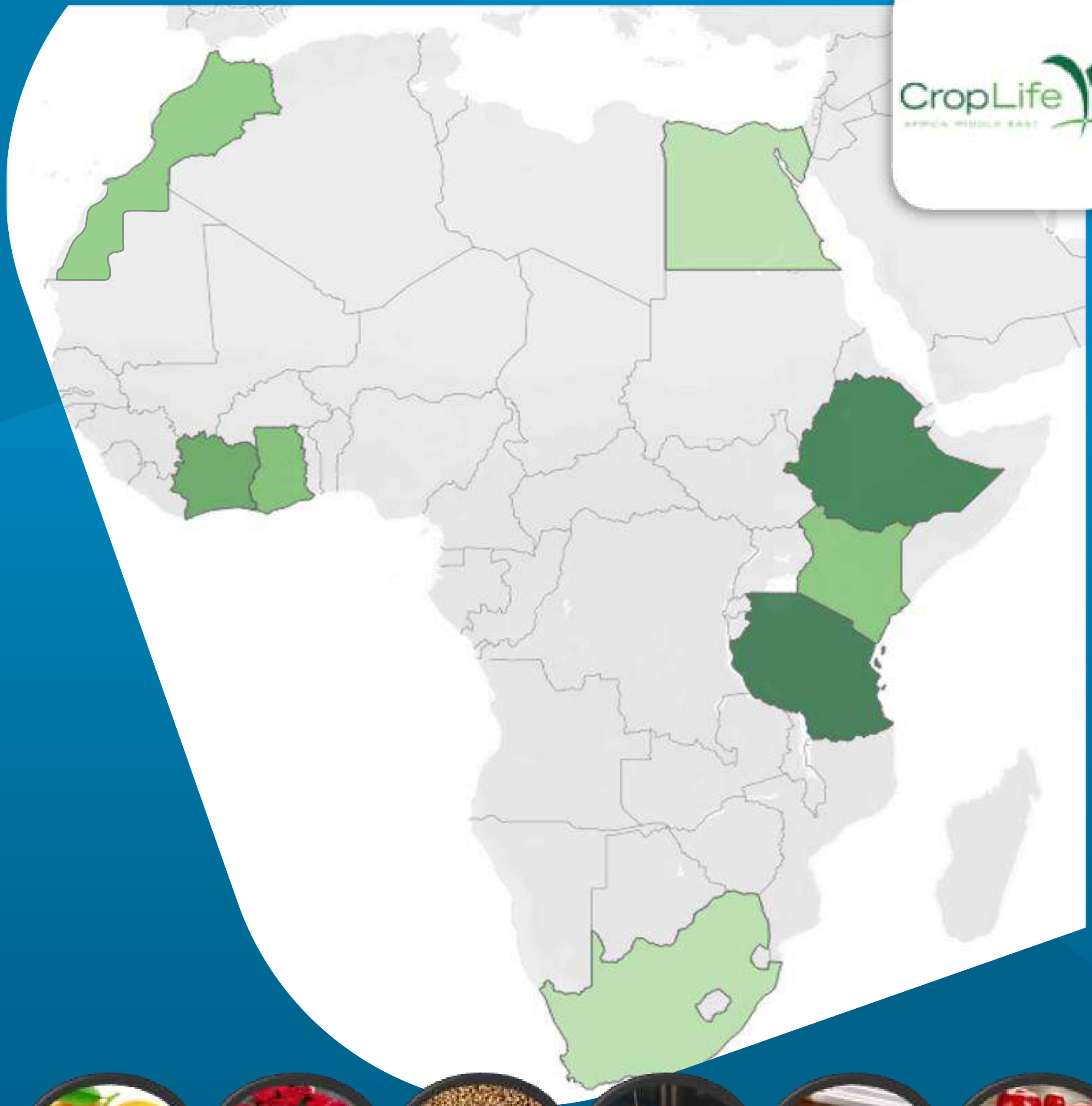
Conclusions & Key points



Strategic Risks & Opportunities

- Market and product concentration: Over-reliance on few crops and markets.
- Seasonality affects competitiveness.
- Alternative markets (Asia, Middle East) are growing but small.
- Intra-African trade remains low: Can collaboration increase agro-processing capacity?

Conclusions

AME countries trade more with the EU and other countries, but less so with Africa. As a result, they tend to face complex trade dynamics. Furthermore, most of them rely on a few products to gain export revenue.

The EU is the primary market for most countries and a high share of exports. On the contrary, that's also the markets with the perceived high degree of regulatory requirements.

The latest trade policy reforms from the key markets have left most AME countries at risk of losing market access or of reduced revenues. Diversification into other markets and efforts to comply with changing regulations are key strategic considerations for sustaining those exports.

Strategic positioning, collaboration with continental partners can mitigate risks and unlock value, especially the untapped potential in Africa.

Recommendations

AME countries need to invest further in digital traceability and certification.

Expand trade agreements beyond the EU and the US and diversify further into other regions.

Promoting regional value chains and processing to uplift Intra-Africa trade is low, underscoring untapped potential. AfCFTA and other continental programmes play a crucial role.

Support smallholder producers to integrate into formal and large value chains, through compliance and other trade facilitation means.

Advocate for fairer global trade practices, i.e., compliance with the international trading systems.

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