Trade Liberalization and the Sub-Saharan African Countries

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Abstract: The Sub-Saharan African countries could benefit more from participation in the next round of trade negotiations than they did in the last Uruguay Round if they improve their overall economic competitiveness. This could allow them to increase foreign market access for export goods in which they have a comparative advantage and for traditional export commodities. They also could make potentially significant gains if they are able to reduce foreign tariff escalation on value-added goods that they could process in their home countries. These countries also will need to continue monitoring food security issues related to the availability of food aid and the growth and volatility of prices of staple import commodities. Finally, Sub-Saharan African domestic reforms could have more impact than trade reform. The countries will benefit by using the international trading system to help re-enforce domestic policy reforms.

Introduction

A new round of multilateral trade negotiations will aim to cover a broad set of rules that will affect global production and trade of agricultural commodities. Both exports and imports of agricultural commodities are vital to the economic development and food security of the Sub-Saharan countries. Agriculture contributes about 35 percent to the region's gross domestic product (GDP), more than any other region in the world. The share of agriculture is about 40 percent of total export earnings, while imports of food products have been growing. The slow growth of food production and the sluggish performance of exports, which are necessary to finance imports, mean that the region is very food insecure. With more than half of the population dependent on the agricultural sector in Sub-Saharan Africa, it is imperative that these countries take measures to improve their agricultural and trade performance.

However, there are also reasons to be optimistic about several countries.[2] Since the mid-1980s, these countries adopted structural adjustment policies aimed at liberalizing their markets and adjusting their macroeconomic policies, in particular exchange rate policies to improve their trade performance. The implications include: positive recent per capita GDP growth rates, increased macroeconomic stability (inflation, fiscal deficits, trade deficits), privatization efforts, efforts to improve legal systems, and improvement in agricultural performance.

Trade could play an important role for the Sub-Saharan African countries. Economically, trade offers short- and long-run opportunities to improve economic efficiency, raise incomes, and increase the variety and quality of consumer goods at lower prices—all of which raise living standards over time. Politically, trade also can help "lock in" domestic reforms that lead to greater stability and peace.

Background Profile

The agricultural sector has a crucial role in the long-term development of most countries in the region. Agriculture remains the most important source of employment in the region. It has been argued that the poor performance of the African agricultural sector is what has prevented the typical economic structural transformation, that is, the decline in the relative contribution of agriculture to the economy that has been experienced in other developing regions. Internal political situations are often blamed for some of these problems. Currently, of the 508 million people in Sub-Saharan Africa, 12 percent live in countries that are at war, 46 percent live in countries with unstable macroeconomic environments (defined as countries with inflation of greater than 25 percent annually), 19 percent live in minimally economically stable countries, and 23 percent live in strong performing countries (Collier et al., 1997) (table B-1).

Quantitatively, trade flows in Sub-Saharan Africa are distinguished by three features. The first is that Sub-Saharan Africa's share of world trade has been shrinking, from 3.7 percent in 1960-62 to 1.5 percent in 1994-96 (World Bank, 1998). The second feature is that Sub-Saharan Africa continues to be highly dependent upon European trade partners (recently about 51 percent, down from around 80 percent in

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[2] The countries include Angola, Benin, Botswana, Côte d'Ivoire, Equatorial Guinea, Ethiopia, Guinea-Bissau, Lesotho, Mauritius, and Uganda (see Fischer, Hernández-Catá, and Khan, 1998).

Table B-1--Selected Macroeconomic, Trade, and Transportation Indicators

Country	Per capita GNP (1996)	Collier et al. stability category 1/ (1996)	WTO status 2/	Openness ratio [(X+M) /GDP]* 3/ (1994-96)	Avg. OECD tariff, industrial exports (1994)	Avg. post-UR bound tariff, agriculture (1995)	Freight costs/ exports (1991)
	U.S. dollars			Ratio		-----Percent-----	
Benin	350	A	3	0.60	0.7	80	15.1
Botswana	3,210	---	2	0.83	0.9	---	---
Burkina Faso	230	A	3	0.41	1.1	150	25.0
Burundi	170	D	3	0.28	6.9	---	---
Cameroon	610	B	2	0.40	3.4	310	38.1
Central Af. Rep.	310	---	3	0.46	3.7	---	47.6
Chad	160	B	3	0.74	---	---	60.5
Congo, Dem. Rep.	130	C	3	0.58	---	---	13.7
Congo, Rep.	670	B	2	1.49	2.1	30	9.4
C te d’Ivoire	660	A	2	0.79	7.6	215	7.4
Ethiopia	100	A	4	0.37	---	---	55.0
Gabon	3,950	---	2	0.96	0.5	260	6.8
Gambia	320	A	3	1.24	9.6	---	21.1
Ghana	360	C	2	0.63	4.3	98	10.6
Kenya	320	B	2	0.73	7.6	100	21.4
Lesotho	660	B	3	1.40	9.1	---	---
Madagascar	250	C	3	0.50	11.1	280	14.2
Malawi	180	C	3	0.66	---	---	56.2
Mali	240	A	3	0.60	1.2	110	52.6
Mauritania	470	A	3	1.06	3.9	54	7.0
Mauritius	3,710	---	2	1.24	55.8	135	11.0
Mozambique	80	C	3	0.88	---	---	18.3
Namibia	2,250	---	2	1.08	0.8	40	---
Niger	200	C	3	0.40	0.1	132	20.7
Nigeria	240	C	2	0.34	0.6	230	8.3
Rwanda	190	D	3	0.45	---	---	---
Senegal	570	A	2	0.69	7.4	180	18.8
Sierra Leone	200	---	3	0.41	2.1	---	15.6
South Africa	3,520	---	1	0.49	---	40	---
Swaziland	1,210	---	2	1.75	67.5	40	---
Tanzania	170	C	3	0.62	9.9	240	40.6
Togo	300	C	3	0.71	2.2	---	13.4
Uganda	300	A	3	0.31	---	80	71.1
Zambia	360	C	3	0.84	---	124	12.0
Zimbabwe	610	B	2	0.86	---	161	6.2

Key:
--- = Not available.
1/ WTO Status: 1-Developed; 2-Developing; 3-Least Developing; 4-Nonparticipant.
2/ Collier et al.: A - Stable and high growth; B - Stable macroeconomics;
C - Unstable macroeconomics; D - War torn or unrest.
3/ * X = Exports of merchandise and goods and services, M = imports of merchandise and goods and services.

Sources: W. Bank, STARS CD-ROM database; Yeats et al. (1997); Harrold (1995); Collier et al. (1997).

the 1960s) (IMF, 1999). Third, exports continue to be highly dependent on primary commodities despite efforts to diversify. In Sub-Saharan Africa, 29 out of 47 countries depend on three primary commodities to provide at least 50 percent of their export revenues (UNCTAD, 1998).

Qualitatively, imports in Sub-Saharan African have been inhibited by tariff and nontariff trade barriers. The Sub-Saharan African countries have higher import tariffs than the rest of the world. According to the World Bank, in 1992-94 average tariffs in Sub-Saharan Africa were about 27 percent, compared with 9 percent for the fast growing exporters and 6 percent in OECD countries (Yeats et al., 1997). Even after the Uruguay Round, Sub-Saharan Africa's tariffs, which were already high by world standards, have remained relatively unchanged. The nontariff barriers in Sub-Saharan Africa also are high compared with other countries: 34 percent on average compared with 4 percent in the fast growing exporters and OECD countries (Yeats et al., 1997).

Trade in Sub-Saharan Africa also has been strongly affected by trade preference arrangements. The major preference arrangement for Sub-Saharan Africa is the Lomé agreement for the African, Caribbean, and Pacific (ACP) countries (currently Lomé IV; Lomé V is being negotiated now), in which the EU offers preferential trade access for goods from Sub-Saharan African countries. The United States has also offered preferential treatment under the General System of Preferences (GSP), but historically this program has not been that significant in promoting trade between the United States and Sub-Saharan Africa. In both regions, tariffs on goods from Sub-Saharan African rise sharply if the goods involve value-added processing ("tariff escalation").

Two related aspects of trade preferences are emerging that could affect trade patterns in Sub-Saharan Africa. One phenomenon is that there has been a rise in regional free trade agreements around the world in recent years. Most of these regional agreements appear to have contributed to increased intra-regional trade. These agreements generally are believed to have led to trade creation (USDA, 1998; Robinson and Thierfelder, 1999). There are currently efforts to negotiate (or re-negotiate) trade agreements in Sub-Saharan Africa (such as the Common Market for East and Southern Africa or COMESA; and the Southern African Development Community or SADC), but historically these agreements have not increased trade much in the region. Another aspect of trade preferences is the WTO's trading system, which allows nations to self-select their country status in order to take advantage of the special and differential treatment (SDT) provisions (see table A-1 in overview article). Of the Sub-Saharan African countries, one country (South Africa) has chosen to be a "developed country," 13 countries have chosen to be considered "less developed countries," 24 countries are considered "least developed countries" because of their designation as such by the United Nations, and 9 countries are not members of the World Trade Organization.

Finally, given the importance of agriculture to Sub-Saharan Africa, it is important to understand that only three countries (South Africa, Uganda, and Zimbabwe) are self-sufficient in grain consumption (slight grain exporters) in recent years. On average during 1996-98, 19 countries required imports to meet about 3-20 percent of their consumption needs, while another 25 countries required imports to meet at least 20 percent of their consumption needs. Higher prices for food on world markets for these import-dependent countries can significantly affect their capacity for commercial imports of food and nonagricultural commodities. Currently, due to limited financial capacity, 18 of 46 countries rely on food aid to meet at least 20 percent of their grain imports (table B-2).

Economic Policies and Performance

There is general agreement in the economic literature that policy accounts for much of economic performance. There is also abundant available research confirming that countries that choose to trade openly perform better. As for Sub-Saharan African countries, most studies have reached the conclusion that sustained domestic reforms are the keys to economic recovery.

Since the mid-1980s, most Sub-Saharan African countries have liberalized their markets. In the area of trade policy, many countries have significantly liberalized and adjusted their exchanges rates. In general, the region can be divided into two groups of countries based on their exchange rate policies. One group, the Western and Central African countries, has adopted a monetary union and has pegged (fixed) its exchange rates to the French franc (the CFA franc zone). This group has been able to avoid foreign exchange rationing, with less import restriction policies, and have been required to maintain fiscal discipline. The second group (non-CFA countries) has adopted a variable exchange rate policy. The countries in this group have erected tariff and nontariff trade barriers. Among this group, only Mauritius and Ghana have come close to completely liberalizing their foreign exchange markets. Some countries in this group, such as Zimbabwe and Kenya, initially had less distorted exchange rates and financial problems, but have not completed the policy reforms necessary to achieve full liberalization.

In Sub-Saharan African countries, nontariff barriers are mainly in the form of government licenses or approval of imports. The problem with this type of trade distortion is the lack of transparency that could significantly change the price signals that are important incentives for trade. Since the mid-1980s, progress has been made by most countries to reduce the number of products requiring prior approval of imports.

Tariff reform in the region typically has been proceeding in three steps. The first step has been to rationalize tariffs, which reduces the number of tariff rates and systematically organizes any exceptions. This step has been implemented in most countries. The second step has been to reduce the

Table B-2--Selected Agricultural Indicators (most recent data available)

Country	Per capita calorie consumption per day 1/ (1994-1996)	Cereal prod. / cereal use (1995-1997)	Cereal food aid imports / total cereal imports (1995-1997)	Primary commodity export dependency ratio 2/ (1995)
	Ratio	Number	Ratio	Percent
Angola	1,927	0.46	0.39	94.5
Benin	2,362	0.89	0.17	93.8
Botswana	2,253	0.26	0.00	---
Burkina Faso	2,254	0.96	0.22	99.0
Burundi	1,711	0.91	0.08	87.9
Cameroon	2,200	0.90	0.01	---
Central African Rep.	1,928	0.87	0.07	55.7
Chad	1,902	0.96	0.46	60.9
Comoros	1,828	0.34	0.04	70.5
Congo, Dem. Rep.	1,880	0.83	0.06	81.5
Congo, Rep.	2,125	0.15	0.10	99.0
Côte d'Ivoire	2,378	0.76	0.06	55.0
Djibouti	1,886	0.00	0.25	---
Eritrea	1,638	0.41	0.34	---
Ethiopia	1,781	0.95	0.99	79.0
Gabon	2,497	0.23	0.00	99.0
Gambia	2,271	0.51	0.05	---
Ghana	2,561	0.87	0.20	67.4
Guinea	2,135	0.71	0.02	91.3
Guinea-Bissau	2,426	0.73	0.06	92.0
Kenya	1,991	0.82	0.11	56.0
Lesotho	2,169	0.45	0.07	---
Liberia	2,098	0.38	0.40	---
Madagascar	1,991	0.96	0.26	---
Malawi	2,048	0.85	0.21	88.8
Mali	2,099	0.97	0.31	73.8
Mauritania	2,632	0.42	0.00	87.8
Mauritius	2,975	0.00	0.10	---
Mozambique	1,719	0.75	0.38	58.1
Namibia	2,164	0.46	0.04	---
Niger	2,090	0.95	0.36	95.7
Nigeria	2,554	0.95	0.00	---
Rwanda	2,064	0.44	0.96	78.8
Senegal	2,391	0.58	0.01	---
Seychelles	2,411	0.00	0.00	---
Sierra Leone	2,017	0.61	0.15	---
Somalia	1,579	0.73	0.10	---
South Africa	2,881	1.00	0.00	---
Sudan	2,355	0.92	0.19	55.7
Swaziland	2,529	0.59	0.04	---
Tanzania	2,016	0.94	0.14	---
Togo	2,096	0.89	0.05	63.3
Uganda	2,196	1.02	0.99	81.5
Zambia	1,940	0.90	0.20	99.0
Zimbabwe	2,035	1.07	0.01	53.0

--- = Not available.

1/ UNFAO recommends a nutritional minimum 2,100 calories per person per day.

2/ Top 3 primary commodity exports / total merchandise exports.

Sources: UNFAO FAOSTAT internet database; UNCTAD.

dispersion of tariffs, which is done by increasing the lowest tariffs and reducing the highest tariffs. This step also has been implemented by most countries. The third step has been to reduce overall protection by lowering average tariffs. This has been implemented in selected countries (Kenya, for example).

In addition to tariff reform, several countries in the Southern African region have cooperated regionally to harmonize their trade policies, which could enhance trade for both the individual countries and the region. For example, the cross-border initiative in South/East Africa is in its final stage, which will eliminate tariffs on intra-regional trade and harmonize external tariffs for all imports.

Several countries also have taken steps to promote exports using various means. Export licences and controls have been significantly reduced, export taxes have been lowered, the role of marketing boards have been reduced, and economic processing zones (EPZs) promoting exports have been established (examples include Madagascar, Kenya, Nigeria and Zambia).

Foreign direct investment (FDI) could be an important stimulant to economic development. However, the share of FDI in the Sub-Saharan African countries has declined from 6 percent in 1984-89 to 3 percent in 1994-95 (two-thirds was accounted for by Nigeria). A World Bank study found that the reasons for the low inflow of FDI to the region were low GDP growth rates, low trade openness, and highly variable real effective exchange rates (World Bank, 1997). Another study found that "red tape" was extensive, expensive, and time-consuming in many countries, which discouraged trade and investment (Lancaster, 1991). FDI also has been discouraged by poor market infrastructure, which has meant that there are high costs to exporting and less flexibility to take advantage of international market opportunities.

Domestic policy reforms have tended to reduce the government role at the sectoral level. As for the agricultural sector, most countries eliminated the role of marketing boards, allowing markets to determine prices for both products and inputs. However, transportation policy remains an important source of inefficiencies. The region's anti-competitive cargo reservation policies that favor domestic carriers have led to high shipping costs, recently estimated to be 20 percent above the world average. One recent study projected that lowering shipping costs to average world levels would have a much greater impact than any trade policy changes (Hertel, Master, and Elbehri, 1998). Burdensome domestic regulatory policies or nationalized transportation carriers also have raised transportation costs over time (Carbajo, 1993). Finally, transportation freight costs escalate for value-added products, which contributes toward dependency on primary commodity exports.

How Did the Uruguay Round Affect Sub-Saharan Countries?

Most of the quantitative analysis reported here was done during and immediately following the Uruguay Round. These studies are at the regional level and have been computable general equilibrium (CGE) models. Most studies projected that there would be very slight negative impacts (-0.2 to -0.5) on African GDP growth compared to the status quo of no global trade liberalization (Golding and van der Mensbrugghe, 1995; Harrison, Rutherford and Tarr, 1995). Most African countries already received high preferential treatment, so uniformly lowering developed country tariffs has the greatest benefit for other exporting regions (especially Asia). This reduces the market shares of Sub-Saharan African countries. Other studies have made qualitative judgements about the impact of the Uruguay Round, reviewing each region's or country's trade structure, the nature of the trade barriers, and the trade commitments. These studies argue that the Uruguay Round was likely to have very little impact on African countries. The basis for this conclusion was the argument that African countries are not fully committed to trade reforms, at least in the short run (Sorsa, 1996).

One must be cautious about over-interpreting the results of these studies because most of the studies are based upon inadequate data, which limit the quality of the results. The overall evaluation of the previous studies indicates that results are highly dependent on the assumptions related to the flexibility and responsiveness of the economies of these countries.

Trade Issues Particularly Important To African Countries

One area particularly important to African countries is food security. Four aspects of food security concerns are: higher food prices, more volatile food prices, declining food aid, and export taxes/restraints. A preliminary assessment of the first two issues shows that so far international food prices have not risen or become more volatile because of the Uruguay Round Agreement on Agriculture, but these issues will continue to be monitored by the United Nations Food and Agriculture Organization (FAO) so that guidelines may be adopted for providing foodstuffs concessionally (Greenfield, de Nigris, and Konandreas, 1996; Sharma et al., 1996; FAO, 1996; Sarris, 1997).

There are at least three other areas of special concern to Sub-Saharan African countries. One area is the erosion of special preferences such as the General System of Preferences (GSP), but especially the EU's Lomé Treaty, which has created preferential access to the EU market. Currently, the African countries face almost no tariffs to Europe for their export products (but the reverse is not true), so there is not much room to negotiate. However, as developed countries have lowered their tariffs to other developing countries (especially Asian countries), this has eroded the

Table B-3--Decomposition of Agricultural Trade, Selected Sub-Saharan African Countries (SSA), 1995-97 averages

	Total merch.	Agri.	Cereals	Meats	Dairy	Fruits & veg.	Bev. crops	Oil-seeds	Sugar	Other
	--- $ billion ----		---------------------------------- Percent ----------------------------------							
Exports										
Benin	0.41	0.20	0	0	0	2	0	9	0	89
Cameroon	1.75	0.57	0	0	0	13	50	0	0	36
Chad	0.20	0.14	0	0	0	0	0	0	0	100
Côte d'Ivoire	4.09	2.24	1	0	0	8	75	0	1	16
Ethiopia	0.49	0.45	0	0	0	3	69	2	0	25
Ghana	1.49	0.55	1	0	0	4	91	1	0	4
Kenya	2.13	1.16	4	0	0	12	60	0	2	21
Madagascar	0.32	0.14	1	3	0	17	64	0	4	11
Malawi	0.51	0.38	1	0	0	1	10	0	7	81
Mali	0.48	0.28	0	0	0	0	0	1	0	98
Mauritius	1.76	0.44	2	3	0	0	1	0	89	6
Namibia	1.38	0.20	0	43	1	0	0	0	0	56
Nigeria	16.25	0.52	0	0	0	5	39	3	0	54
South Africa	29.61	2.41	16	3	2	36	2	1	6	34
Sudan	0.57	0.54	4	5	0	3	0	22	3	63
Swaziland	0.91	0.30	0	1	0	11	0	1	47	39
Tanzania	0.72	0.44	0	0	0	19	38	2	2	39
Togo	0.23	0.13	1	0	1	0	23	1	0	73
Uganda	0.60	0.46	4	0	0	4	83	2	0	6
Zimbabwe	2.36	1.09	7	2	1	3	5	1	8	73
SSA	83.49	13.74	4	2	1	12	35	2	7	38
Imports										
Benin	0.67	0.12	34	11	6	8	1	0	11	29
Cameroon	1.18	0.12	50	2	7	4	1	0	7	29
Chad	0.25	0.05	41	2	6	2	2	0	21	26
Côte d'Ivoire	3.07	0.44	47	2	11	4	1	0	4	30
Ethiopia	1.09	0.20	58	0	1	2	0	0	6	32
Ghana	1.73	0.24	45	7	5	4	1	0	24	15
Kenya	3.14	0.38	43	0	1	3	1	0	4	47
Madagascar	0.54	0.08	44	0	7	1	1	0	7	40
Malawi	0.57	0.08	58	1	7	3	1	0	0	30
Mali	0.78	0.10	26	0	16	10	16	0	17	14
Mauritius	2.21	0.34	24	10	15	11	2	0	4	35
Namibia	1.55	0.10	20	7	0	44	0	1	23	5
Nigeria	15.67	1.36	31	0	17	0	1	0	16	33
South Africa	27.79	1.99	23	9	3	5	6	2	1	52
Sudan	1.37	0.29	45	0	3	7	16	0	0	28
Swaziland	1.09	0.10	19	11	12	16	6	1	0	36
Tanzania	1.42	0.20	26	0	2	4	0	0	13	54
Togo	0.44	0.07	33	5	8	4	2	0	7	40
Uganda	0.86	0.06	40	0	4	1	0	0	22	32
Zimbabwe	2.87	0.23	33	0	2	8	2	4	2	49
SSA	84.49	10.36	34	5	8	6	3	1	8	35

relative competitive edge of Sub-Saharan African countries. This process of tariff reduction will probably continue in the next round, which will add further pressure on the Sub-Saharan African economies to perform better.

Another area of special concern is tariff escalation. Sub-Saharan African countries, similar to other developing countries, typically face high tariff rates from developed countries as they engage in value-added production. Less well known, however, is that developing countries have even greater escalating tariff rates than the developed countries, which discourages trade among developing countries.

Conclusions

Over time, the economic benefits of trade liberalization include rising incomes, a greater variety of consumer goods at lower prices, and greater production efficiency. The Sub-Saharan African countries are aware of the importance of the next WTO negotiations, and many intend to be more active participants than they were in the Uruguay Round. They hope to protect their trading interests, learn about new trading opportunities, discipline their economies, and attract foreign investment.

Analysis of the Uruguay Round suggests that Sub-Saharan African countries would not be affected by the global trade commitments, but this analysis requires some caution because of data limitations and the assumptions about countries' commitments to trade liberalization. In the next trade round, the Sub-Saharan African countries will need to continue monitoring food security issues, in particular regarding the effects of the agreements on food import bills. It would be to their benefit if they could increase foreign market access for export goods in which they have a comparative advantage (such as textiles, shoes, and leather goods) as well as for traditional export goods (such as sugar, cocoa and coffee) (table B-3). They also could make potentially significant gains if they are able to reduce foreign tariff escalation on value-added goods, which they could process in their home countries.

Eroding trade preference arrangements and the further erosion likely in the next trade round make policy reform critical to Sub-Saharan African countries. Domestic reforms may hold more promise for improving economic performance than trade policy reforms such as lowering tariffs. Any cost-cutting measure is very important to helping the countries be competitive in foreign trade. For example, elimination of cargo preferences that lead to competitive shipping rates and streamlining regulations of domestic transportation carriers and freight could promote exports of value-added goods. The Sub-Saharan countries should also use the international trading system to help re-enforce domestic policy reforms.

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