



# Products & Markets with Export Growth Potential in COMESA

AFRICAN CONTINENTAL FREE TRADE AREA | 2021

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## About the paper

In the context of the SheTrades in the African Continental Free Trade Area (AfCFTA) project, which supports women entrepreneurs and producers to benefit from trade opportunities under the agreement, this report presents the findings of a study, using ITC's Export Potential Map methodology, that identifies products and markets with export growth potential in countries in the COMESA region.

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## Acronyms

Unless otherwise specified, all references to dollars (\$) are to United States dollars, and all references to tons are to metric tons.

|        |   |
|--------|---|
| AfCFTA | African Continental Free Trade Area                     |
| COMESA | Common Market for Eastern and Southern Africa           |
| EPI    | Export Potential Indicator                              |
| DRC    | Democratic Republic of the Congo                        |
| GDP    | Gross Domestic Product                                  |
| GIZ    | Deutsche Gesellschaft für Internationale Zusammenarbeit |
| HS     | Harmonized System                                       |
| ITC    | International Trade Centre                              |
| RoA    | Rest of Africa  |
| VCI    | Value Chain Indicator                                   |

## CHAPTER 1 INTRODUCTION

### Background

On 1<sup>st</sup> January 2021, ratifying countries<sup>1</sup> started trading under the African Continental Free Trade Agreement (AfCFTA). African women's business associations in the Common Market for Eastern and Southern Africa (COMESA) region need to be aware of the export opportunities that arise from this continental trade agreement.

This report uses ITC's export potential methodology to assess COMESA countries' potential to export different products to regional markets. It identifies opportunities for export growth in African markets, with and without the implementation of the AfCFTA. The report also identifies opportunities for regional value chain development. The analysis highlights industries with high female labour participation to support inclusive development.

The report is part of a broader project which aims to support women-owned businesses to benefit from trade opportunities created by the African Continental Free Trade Area (AfCFTA), SheTrades in the AfCFTA (see Box 1). Opening markets to reach more than 1.2 billion people in Africa and accounting for a combined gross domestic product of more than \$3.4 trillion USD, the AfCFTA has phenomenal potential to spur intra-African trade. Given its potential to foster regional value chains and its ambition to encompass goods, services, intellectual property, competition and investment, it is critical that gender is mainstreamed from a very early stage, to ensure that women are well positioned to seize opportunities in regional trade. Moreover, gender should be mainstreamed coherently in regional development programmes supporting the AfCFTA, such as the Boosting Intra-African Trade Action Plan, which aims to catalyse much needed investment, capacity building, and Aid for Trade. To address this need, ITC is supporting the participation of women-owned businesses in the implementation and negotiations of the AfCFTA.

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<sup>1</sup> At the time of writing, 31 countries have deposited their instruments of AfCFTA ratification with the AUC Chairperson: Ghana, Kenya, Rwanda, Niger, Chad, Congo Republic, Djibouti, Guinea, Eswatini, Mali, Mauritania, Namibia, South Africa, Uganda, Ivory Coast (Côte d'Ivoire), Senegal, Togo, Egypt, Ethiopia, The Gambia, Sierra Leone, Saharawi Republic, Zimbabwe, Burkina Faso, São Tomé and Príncipe, Gabon, Equatorial Guinea, Mauritius, Angola, Lesotho and Tunisia. *Source:* Tralac (2021). *Status of AfCFTA Ratification*, available at [tralac.org/resources/infographic/13795-status-of-afcfta-ratification.html](https://tralac.org/resources/infographic/13795-status-of-afcfta-ratification.html).

Box 1      SheTrades in the AfCFTA

**About the SheTrades in the AfCFTA Project**

Funded by Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ), the SheTrades AfCFTA project aims to support women-owned businesses to benefit from trade opportunities created by the AfCFTA through capacity building, networking, and advocacy. The project is working with more than 50 women's business associations across the continent to identify priority issues for women under the AfCFTA and foster dialogues with trade negotiators.

Beyond developing concrete recommendations on Phase I and II issues, the project is supporting the creation of an Africa-wide network of women's business associations, providing technical assistance at the national level, creating training resources to support women's associations under the regional economic communities, and providing crisis-management toolkits to help women weather the shocks of the COVID-19 pandemic.

**Project Objectives**

The SheTrades AfCFTA project seeks to achieve the following objectives:

- Raise awareness and understanding of women on priority topics related to the AfCFTA through knowledge tools, online modules, and advocacy;
- Develop recommendations, on both Phase I and II issues integrate priorities for women's economic empowerment into the AfCFTA;
- Discuss policy advocacy strategies and how to apply them to discussions with policymakers;
- Provide a platform for dialogue between women's business associations and policymakers to agree on and operationalize the recommendations; and
- Strengthen women's business associations across the continent to work better together.

## Key findings

Important growth opportunities for exports to Africa exists in all COMESA countries. All African markets combined, there exists an unrealized export potential of about \$8 billion that COMESA exporters can tap into. Export potential will grow further under the AfCFTA: if intra-African tariffs are set to 0%, this will create an additional export growth potential of \$5 billion.

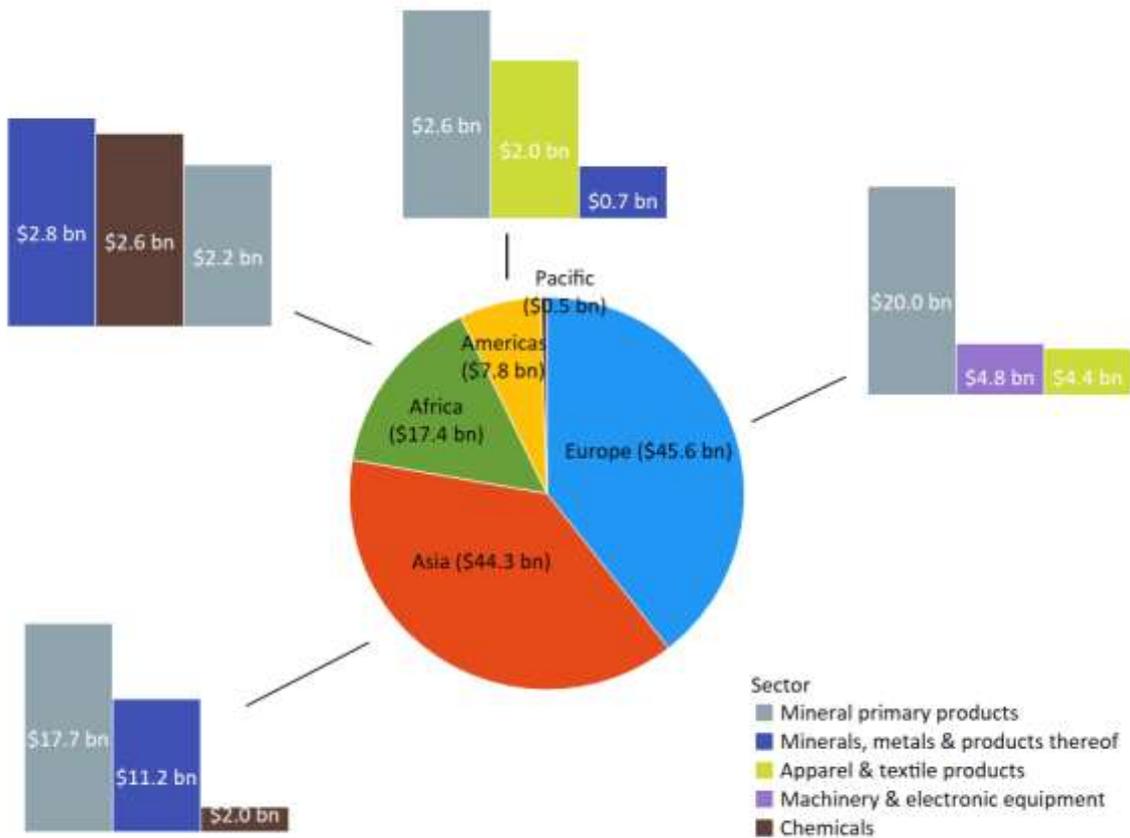
The size of untapped export potential in Africa as well as the potential benefits from a full implementation of the AfCFTA vary across exporters, markets, products/sectors, and combinations of those. However, each COMESA country has significant export growth opportunities in African markets under current tariffs conditions and can benefit from additional opportunities in the scenario of a full tariff liberalization under the AfCFTA. Details on the top products, sectors and markets with opportunities for each COMESA country are provided in the country profiles.

### Trade opportunities in the COMESA region

The top destination regions for COMESA exports are Europe (\$45.6 billion) and Asia (\$44.3 billion) – about 78% of total exports are destined to these two continents. Mineral primary products are the most important export sector to both. In Europe, they are followed by machinery and electronic equipment and apparel and textile products, and in Asia, by minerals, metals and products thereof and chemicals.

Africa is the third most important export region and represents, with \$17.4 billion, 15% of total exports. Intra-COMESA exports play an important role, as they account for \$10.2 billion, or 58% of COMESA exports to Africa. Exports to Africa are dominated by minerals, metals and products thereof, chemicals, and mineral primary products.

Figure 1 COMESA total exports per region, top three sectors per region



Note: Export figures are based on a 2015-2019 weighted average of direct and mirror reports. Only export figures of the top three sectors in each regional market are presented.

While COMESA exporters are thus already serving African destinations, there exist numerous opportunities to increase exports to those markets. As explained in further detail in box 1, ITC uses its exports potential methodology to identify such opportunities for export growth. The concept of “untapped (unrealized) export potential” refers to such opportunities. It measures by how much export potential exceeds actual trade. In other words, it captures how much exports can grow by 2025 if market frictions beyond tariffs (for example, lack of information on or difficulty to satisfy regulations or consumer preferences for a particular product in the target market) are fully removed and the necessary investments to increase production capacity are undertaken.

All African markets and all export products combined, there exists such an unrealized export potential of about \$8 billion that COMESA exporters can tap into. Under a full liberalization scenario, i.e. if, under the AfCFTA, intra-African tariffs are set to 0%, export potential can grow by an additional \$5 billion.

#### Box 2 Export Potential Methodology

ITC's export potential methodology quantifies a country's or region's export potential across sectors and markets through an assessment of projected export performance and import demand as well as the bilateral trade linkages between the exporting country and the target market. The analysis identifies those products and markets that remain promising despite the gloomy economic outlook. It considers situations with and without tariff cuts under the AfCFTA.

ITC's export potential methodology computes expected values of trade for each exporter-importer-product combination using information on the exporter's projected supply capacity for a given product, the importer's projected demand for that same product and the ease of trade between the two trading partners. It takes into consideration the most recent Gross Domestic Product (GDP) forecasts to capture the expected evolution of demand and supply capacity.

Through an analysis of input-output linkages and production capabilities, the method can also identify new export opportunities for value-added diversification of the export basket. Targeted to industries that feature a high female labour participation, the analysis can support inclusive development.

Further details on the export potential and value chain methodology are presented in Appendix 1.

Figure 2 illustrates COMESA's export potential to Africa in the six sectors with the highest untapped export potential.<sup>2</sup> It also displays the additional export potential to COMESA and the rest of Africa that would arise if the AfCFTA were fully implemented (using estimations in which all intra-African tariffs are reduced to zero).

The sector in which COMESA has the highest untapped export potential to Africa is chemicals, with possible additional exports worth \$588 million and \$809 million to COMESA and other African markets, respectively. Tariff reductions through the AfCFTA could further increase the export growth potential by about 59%. Put otherwise, chemicals exports to Africa have the potential to more than double over the next five years. This sector also comprises beauty products and perfumes as well as fertilizers.

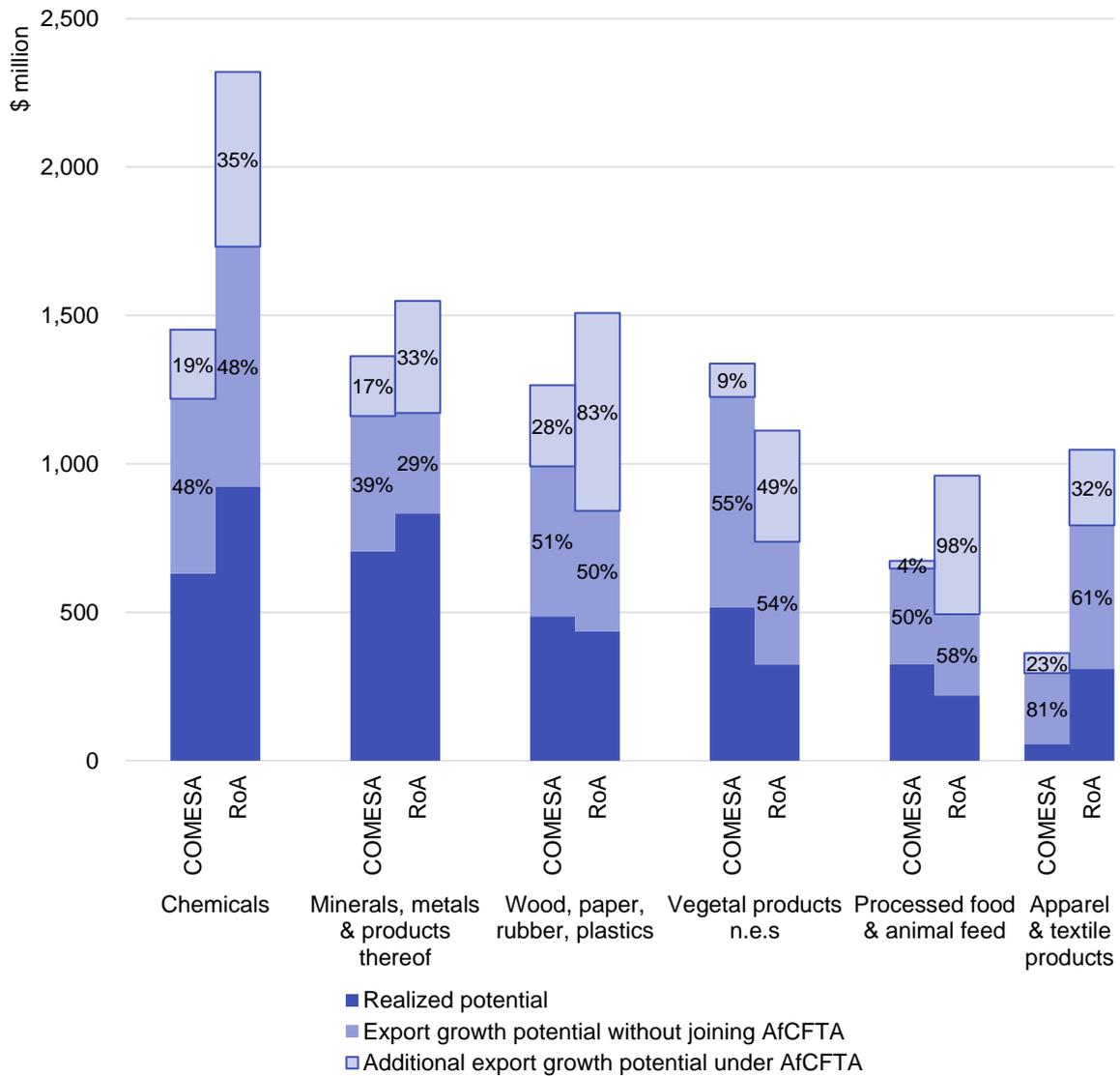
Other sectors with high untapped export potential to Africa include minerals, metals and products thereof, wood, paper, rubber and plastics, vegetal products, processed wood and animal feed, and apparel and textile products. While there is some variation between sectors, both COMESA and the rest of Africa are important markets for all of them. There exists significant export growth potential in all sectors (more than 30%). Relative growth potential without the implementation of the AfCFTA is particularly high in apparel and textile exports to COMESA, where actual exports remain low.

The potential gains from a full implementation of the AfCFTA vary across sectors. They represent a larger share of total export potential in the rest of Africa than in COMESA, as within-COMESA tariffs have already been liberalized between members of the COMESA free trade area.

The sectors in which COMESA would benefit from the largest export potential gains from a full tariff liberalization in Africa are wood, paper, rubber, plastics with an additional export potential of \$940 million and chemicals with \$822 million. They are followed by minerals, metals and products thereof (\$579 million), processed food and animal feed (\$493 million) and vegetal products (\$486 million).

<sup>2</sup> Export Potential Map excludes products that are hazardous or irrelevant for export promotion. For the full list of excluded products, see International Trade Centre (2019). Annex V: Excluded Products. Export Potential Map, available at <https://umbraco.exportpotential.intracen.org/media/1186/exclusion-list-epm.pdf>. Excluded products represent 45% of the region's total exports between 2015 and 2019, most importantly oil and gas.

Figure 2 Total realized potential and untapped potential per sector, COMESA vs Rest of Africa (RoA)



Note: Labels indicate the share in total export potential of a) unrealized export potential under current tariff conditions and b) additional export potential in a full tariff liberalization scenario under the AfCFTA.

## Value chain opportunities in the COMESA region

The outputs in the examples below were selected based on three criteria: the importance of the sector for COMESA exporters, strong demand in both COMESA and African markets and the availability of established suppliers for the required inputs in the region. Together, these conditions allow for successful basket diversification while promoting the development of regional value chains.

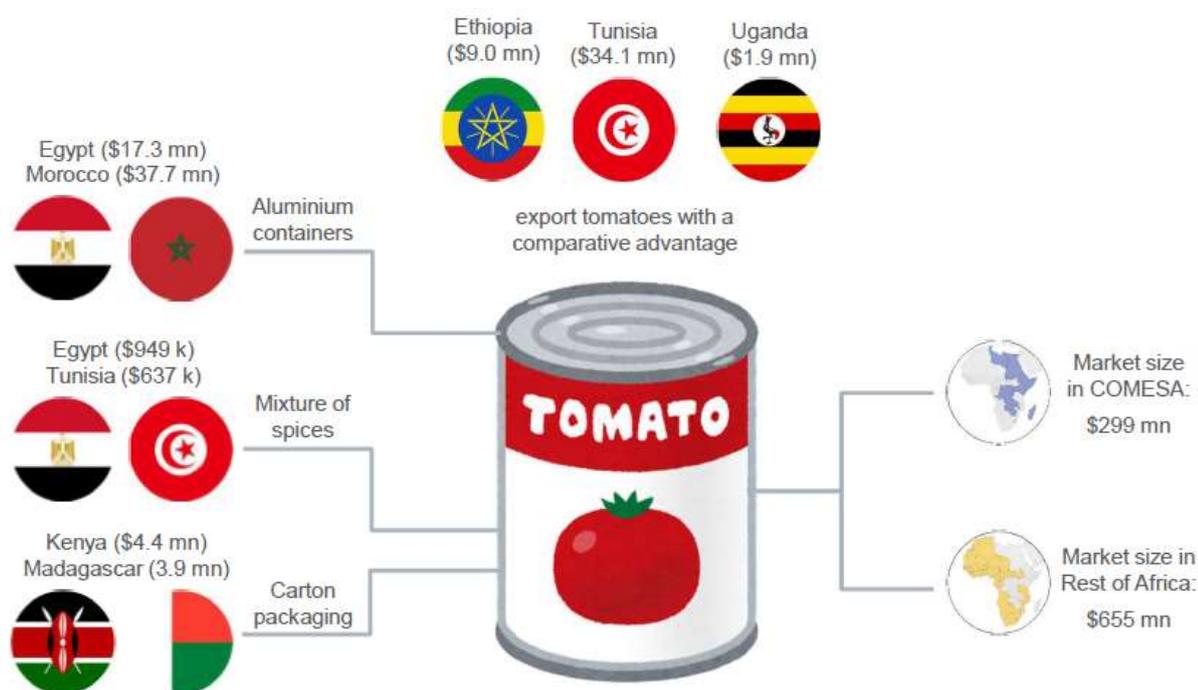
### Processed foods

Figure 3 illustrates the possibility to build a regional value chain in COMESA to export preserved tomatoes, identified by the Harmonized System (HS) code 200290. Ethiopia, Tunisia and Uganda export fresh tomatoes with a comparative advantage with average exports between 2015 and 2019 of \$9.0, \$34.1 and \$1.9 million respectively. Both Tunisia and Uganda have relatively high shares of women participation in the corresponding sector (for Ethiopia, this information is not available).

Additional inputs necessary for the production of preserved tomatoes, such as aluminium containers, spices mixtures and carton packaging, are available in other COMESA countries. For aluminium containers, Egypt and Morocco stand out with average export between 2015 and 2019 amounting to \$17.3 million and \$37.7 million, respectively. Mixtures of spices could be sourced from Egypt or Tunisia and carton packaging from Kenya or Madagascar.

Demand for preserved tomatoes is large both in COMESA and in the rest of Africa. Imports are expected to reach \$299 million in COMESA and \$655 million in the rest of Africa by 2025.

Figure 3 Prepared and preserved tomatoes (200290)



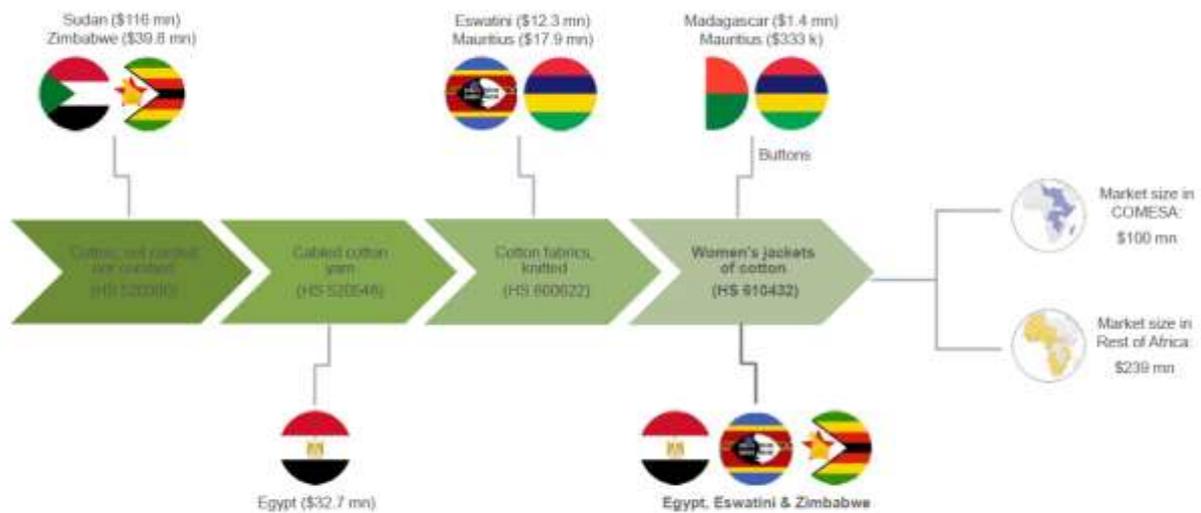
Note: Figures in brackets represent the country's actual exports to the world, based on a 2015-2019 weighted average of direct and mirror reports. Market size is defined as world projected imports to the target market up to the year 2025.

## Clothing

Another promising opportunity for the development of regional value chains in COMESA comes from the textile sector. Figure 4 presents the multiple stages necessary to transform cotton, not carded nor combed (HS 520300) into women’s jackets of cotton (HS 610432). Imports of women’s jackets of cotton (HS 610432) are expected to reach \$100 million in COMESA and \$239 million in the rest of Africa by 2025.

Starting from cotton, not carded nor combed (HS 520300) from Sudan and Zimbabwe, Egypt could produce cabled cotton yarn (HS 520548), which would then be an input for Eswatini’s and Mauritius’ production of knitted cotton fabrics. This knitted cotton fabrics along with additional inputs, for instance buttons from Madagascar and Mauritius, would be then used for the production of women’s jackets of cotton. Exporting this product would also favour women labour participation, as both Egypt and Eswatini have a relatively high share of women participation in this sector. (For Zimbabwe, this information is not available.)

Figure 4 Women’s cotton jackets & blazers (610432)



Notes: Figures in brackets represent the countries' actual exports to the world, based on a 2015-2019 weighted average of direct and mirror reports. Market size is defined as world projected imports to the target market up to the year 2025.

## CHAPTER 2 PRODUCTS AND MARKETS WITH EXPORT POTENTIAL FOR COMESA COUNTRIES

The following section presents top products and subsectors with export potential to Africa for each COMESA country. For countries with a small number of products with export potential, results are presented by product. For countries with a large numbers of products with export potential, results are aggregated at the subsector level. Sector aggregations are used whenever a country has export potential to Africa in at least 20 products.

Top markets in Africa are identified for three selected products/subsectors per country. The selection of products/subsectors accounts for the size of export growth potential in Africa and female labour force participation. The female labour force participation indicator compares the share of women working in an industry to the national average to identify industries that create a relatively large share of job opportunities for women. Details on the indicator are included in the methodological annex.

## Burundi

Burundi has an export potential to the world of \$96 million. COMESA is the destination for about 27% of Burundi's export potential, while the rest of Africa only plays a minor role with 3%.

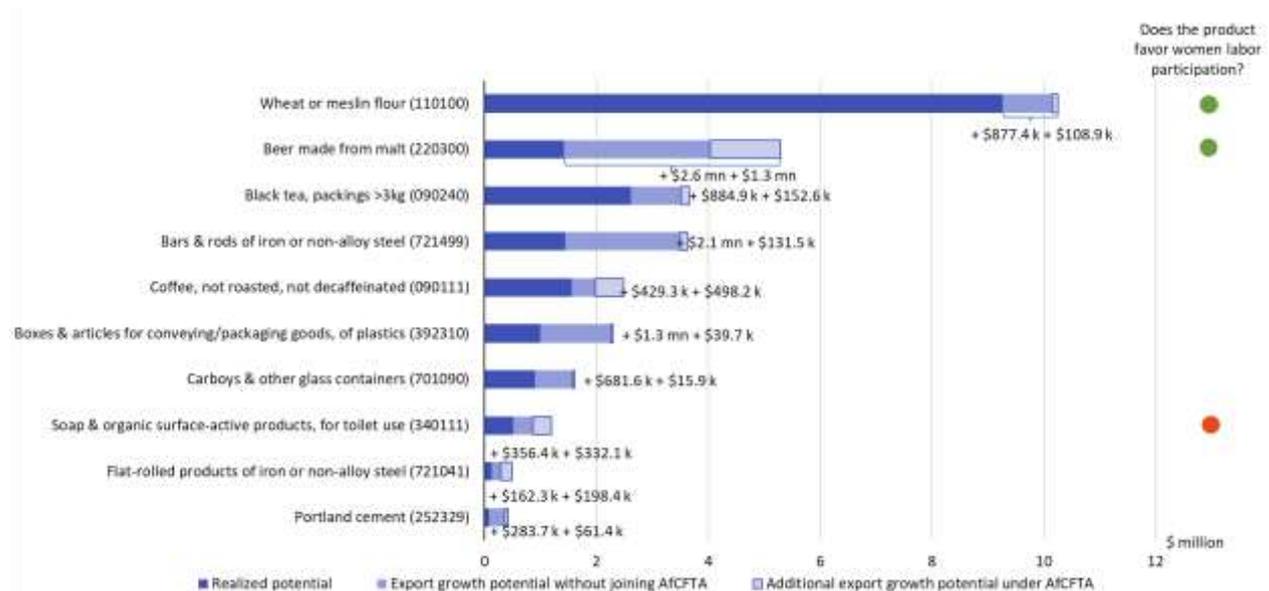
Joining the AfCFTA would increase Burundi's export potential to COMESA by 38% and export potential to the rest of Africa by 54% (under the assumption that all other African countries have joined as well).

Wheat flour is the most important product with export potential to Africa. It represents \$10.3 million, or 33% of the country's total export potential to the region, out of which \$0.9 million is still untapped. Joining the AfCFTA would increase export growth potential by \$109,000.<sup>3</sup>

The second most important product with export potential is beer (\$5.3 million). A relatively large share of this export potential is untapped, leaving room to increase exports by \$2.6 million, plus \$1.3 million if the country joins the AfCFTA. Both wheat flour and beer belong to the "manufacture of food products and beverages" industry, which features a high share of female labour in Burundi.

Black tea in packs > 3kg has an export potential of \$3.6 million. The potential for export growth stands at \$884,000 and could increase by \$153,000 if Burundi joined the AfCFTA. Information on female labour force participation is not available for the corresponding industry in Burundi.

Figure 5 Burundi: Total realized and unrealized export potential to Africa, by product



Note: Green dots show products belonging to sectors in which the share of women employees is above the national average or above 50% but smaller than the national average. Yellow dots symbolize sectors in which the share of women is close to average (less than 10% below average). Red dots stand for sectors in which the share of women is more than 10% below the national average. Labels indicate total export growth potential per product.

<sup>3</sup> Under the assumption that all other African countries have joined, too.

Figure 6 Burundi: Export growth potential for selected products, to African countries



**WHEAT FLOUR**

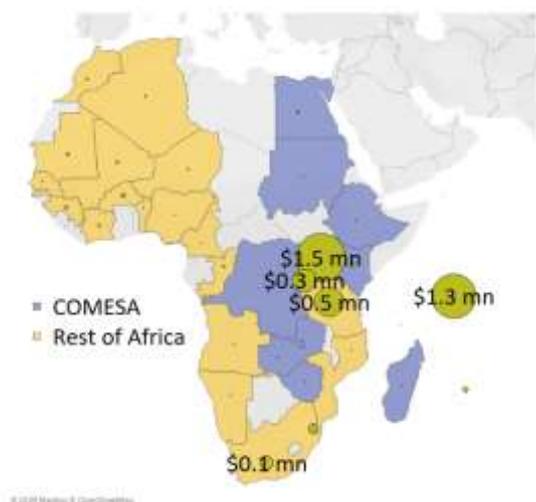
Burundi has the potential to increase its exports of wheat flour to Africa by \$986,000 – \$877,000 under current tariff conditions and another \$109,000 if intra-African tariffs are fully removed.

COMESA markets hold \$680,800 (69%) of this potential, mainly:

- Seychelles: \$327,200
- Rwanda: \$147,700

Other African markets hold \$305,600 (31%) of this potential, mainly:

- United Republic of Tanzania: \$192,800



**BEER**

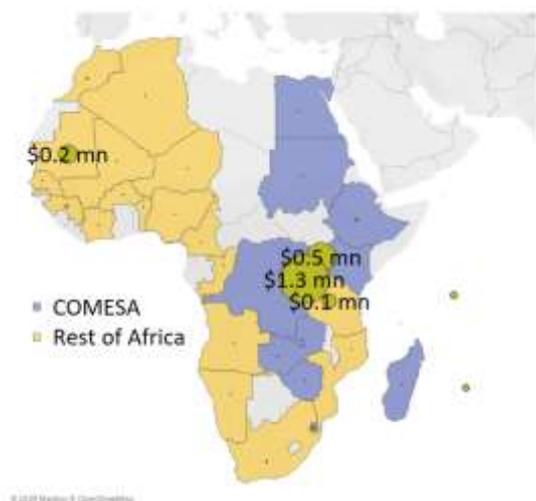
Burundi has the potential to increase its exports of beer to Africa by \$3.9 million – \$2.6 million under current tariff conditions and another \$1.3 if intra-African tariffs are fully removed.

COMESA markets hold \$3.2 million (83%) of this potential, mainly:

- Uganda: \$1.5 million
- Seychelles: \$1.3 million

Other African markets hold \$678,000 (17%) of this potential, mainly:

- United Republic of Tanzania: \$537,400



**BLACK TEA**

Burundi has the potential to increase its exports of black tea in packs > 3kg to Africa by \$1 million – \$885,000 under current tariff conditions and another \$153,000 if intra-African tariffs are fully removed.

COMESA markets hold \$805,100 (78%) of this potential, mainly:

- Kenya: \$690,500
- Eswatini: \$55,800

Other African markets hold \$232,400 (22%) of this potential, mainly:

- South Africa: \$179,900

Note: Coloured countries are African countries in which the exporter has unrealized potential in this product. Bubbles and labels show total export growth potential under AfCFTA, per market.

## Comoros

The Comoros have an export potential to the world of \$79 million. COMESA is the destination for about 2% of the Comoros's export potential, while the rest of Africa plays an even smaller role with less than 1%.

Joining the AfCFTA would increase the Comoros' export potential to COMESA by about 1.1%. Export potential to the rest of Africa would be multiplied by 264% (under the assumption that all other African countries have joined as well).

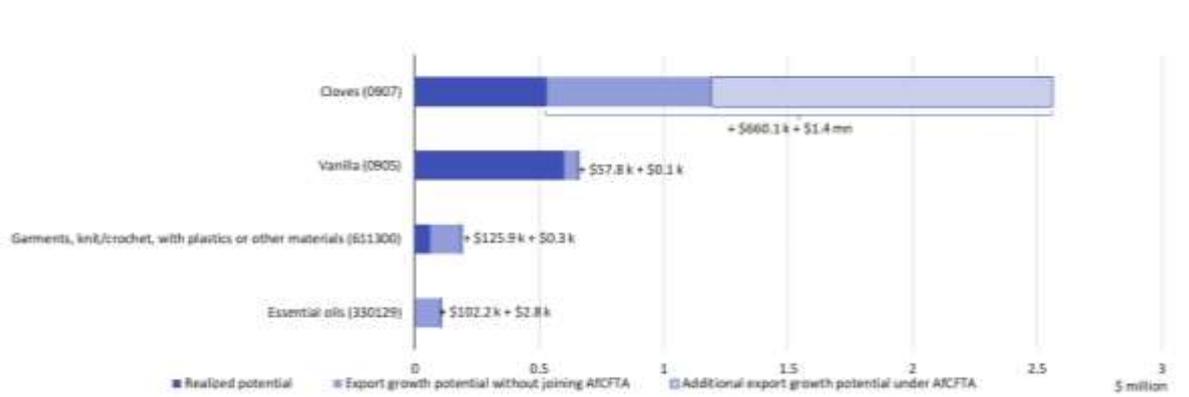
Cloves are the most important product with export potential to Africa. They represent \$2.6 million, or 73% of the country's total export potential to the region, out of which \$660,100 is still untapped. Joining the AfCFTA would increase export growth potential by \$1.4 million.<sup>4</sup>

The second most important product with export potential is vanilla (\$656,300). Only a small share of this export potential is untapped, leaving room to increase exports by \$57,800.

Garments, knit/crochet, with plastics or other materials have an export potential of \$187,400. The potential for export growth is \$125,900. It would not be affected if the Comoros joined the AfCFTA.

Information on female labour force participation is not available for the Comoros.

Figure 7 Comoros: Total realized and unrealized export potential to Africa, by product



Note: Green dots show products belonging to sectors in which the share of women employees is above the national average or above 50% but smaller than the national average. Yellow dots symbolize sectors in which the share of women is close to average (less than 10% below average). Red dots stand for sectors in which the share of women is more than 10% below the national average. Labels indicate total export growth potential per product.

<sup>4</sup> Under the assumption that all other African countries have joined, too.

Figure 8 Comoros: Export growth potential for selected products, to African countries



**CLOVES**

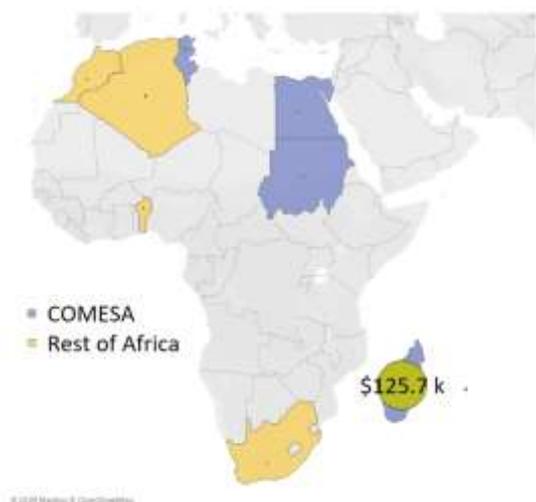
The Comoros have the potential to increase exports of cloves to Africa by \$2 million – \$444,400 under current tariff conditions and another \$1.6 million if intra-African tariffs are fully removed.

COMESA markets hold \$772,600 (22%) of this potential, mainly:

- Egypt: \$287,100

Other African markets hold \$1.8 million (78%) of this potential, mainly:

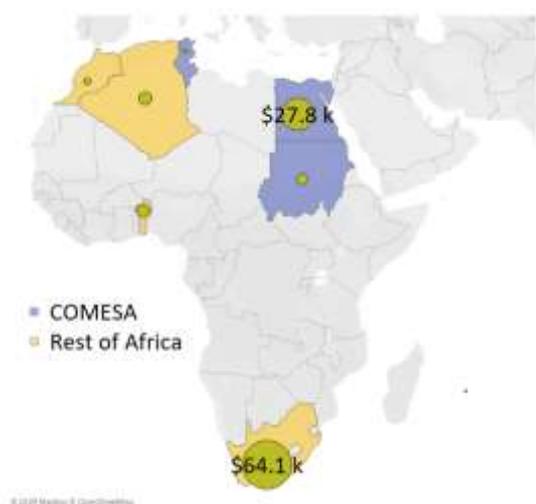
- Benin: \$1.2 million
- Rwanda: \$432,600



**GARMENTS**

The Comoros have the potential to increase their exports of garments, knit/crochet to Africa by \$125,900 under current tariff conditions

Virtually all of this potential lies in Madagascar, which is a COMESA market.



**ESSENTIAL OILS**

The Comoros have the potential to increase their exports of essential oils 3kg to Africa by \$105,000 – \$102,000 under current tariff conditions and another \$3,000 if intra-African tariffs are fully removed.

COMESA markets hold \$31,100 (30%) of this potential, mainly:

- Egypt: \$27,800

Other African markets hold \$74,000 (74%) of this potential, mainly:

- South Africa: \$64,100

Note: Coloured countries are African countries in which the exporter has unrealized potential in this product. Bubbles and labels show total export growth potential under AfCFTA, per market.

## Democratic Republic of the Congo

The Democratic Republic of the Congo (DRC) has an export potential to the world of \$10.6 billion. Both COMESA and the rest of Africa currently play a limited role in the country's exports, with 2.2% and 1.3%, respectively.

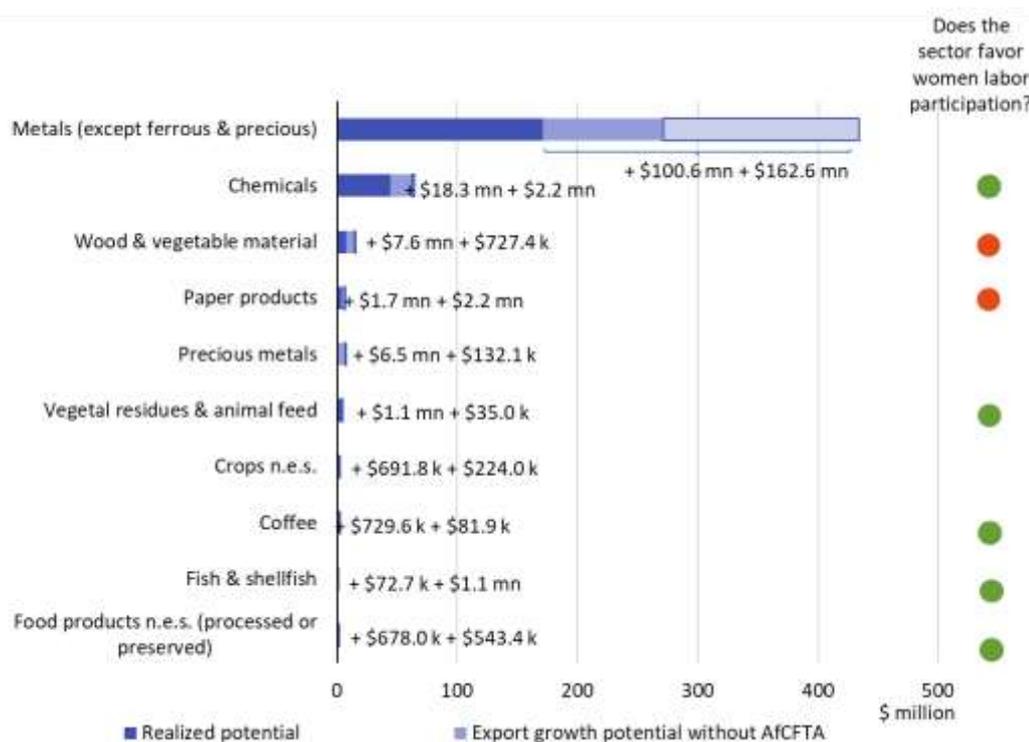
Joining the AfCFTA would increase the DRC's export potential to COMESA by 71% and export potential to the rest of Africa by 5.5% (under the assumption that all other African countries have joined as well).

Metals is by far the most important subsector with export potential to Africa. It represents \$434.1 million, or 81% of the country's total export potential to the region. Of this export potential, about \$100.6 million is still untapped. Joining the AfCFTA would increase export growth potential by \$162.6 million.<sup>5</sup> The product with the highest export growth potential in this subsector is copper cathodes (\$239.4 million), followed by unrefined copper (\$20.0 million). Information on female labour force participation is not available for the corresponding industry in the DRC.

The second most important subsector with export potential is chemicals (\$64.7 million). Part of this potential is still untapped, leaving room to increase exports by \$18.3 million— plus another \$2.2 million if the DRC joins the AfCFTA. The industry features a relatively high share of female labour in the DRC. The products with the highest export growth potential are carbonates and peroxocarbonates (\$14.3 million) and cobalt oxides and hydroxides (\$496.0 million).

Wood and vegetable material has an export potential of \$15.5 million, about half of which is still unexploited. The potential for export growth is \$7.6 million. It could increase by \$727,000 if the DRC joins the AfCFTA.

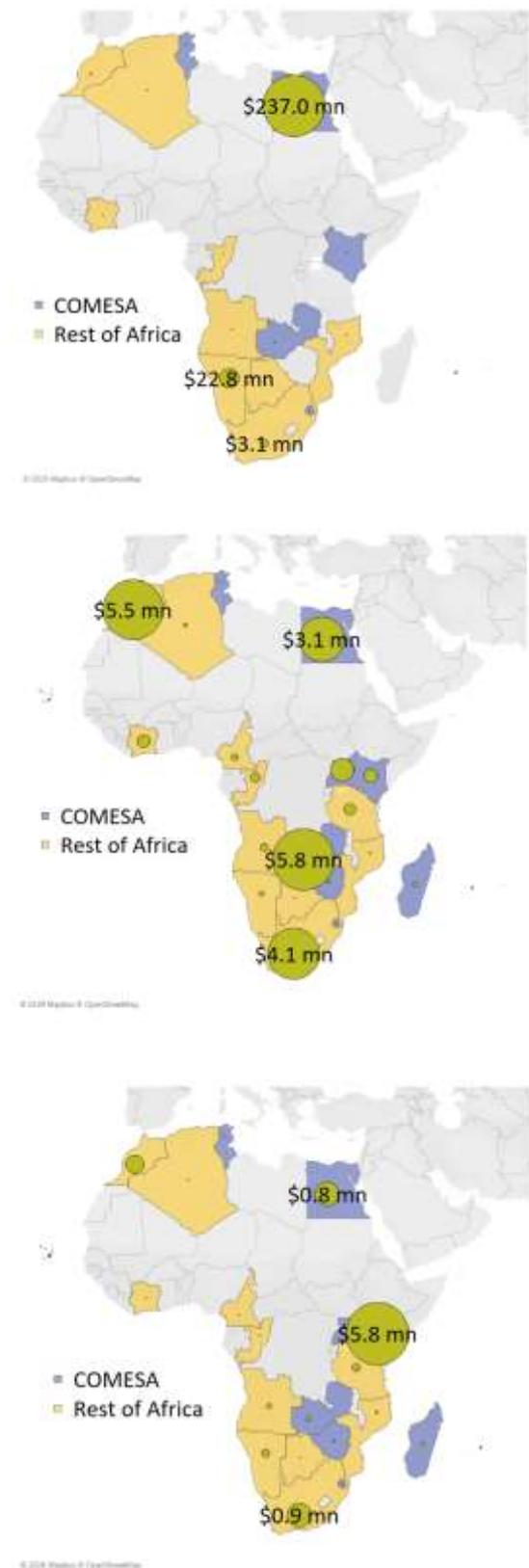
Figure 9 DRC: Total realized and unrealized export potential to Africa, by product



Note: Green dots show products belonging to sectors in which the share of women employees is above the national average or above 50% but smaller than the national average. Yellow dots symbolize sectors in which the share of women is close to average (less than 10% below average). Red dots stand for sectors in which the share of women is more than 10% below the national average. Labels indicate total export growth potential per product.

<sup>5</sup> Under the assumption that all other African countries have joined, too.

Figure 10 DRC: Export growth potential for selected products, to African countries



**METALS (EXCEPT FERROUS & PRECIOUS)**

The DRC has the potential to increase its exports of metals to Africa by \$263.1 million – \$100.6 million under current tariff conditions and another \$162.6 million if intra-African tariffs are fully removed.

COMESA markets hold \$237 million (90%) of this potential, virtually all in Egypt.

Other African markets hold \$26.1 million (10%) of this potential, mainly:

- Namibia: \$22.8 million
- South Africa: \$3.1 million

**CHEMICALS**

The DRC has the potential to increase its exports of chemicals to Africa by \$20.5 million – \$18.3 million under current tariff conditions and another \$2.2 million if intra-African tariffs are fully removed.

COMESA markets hold \$10.1 million (49%) of this potential, mainly:

- Zambia: \$5.8 million
- Egypt: \$3.1 million

Other African markets hold \$10.4 (51%) of this potential, mainly:

- Morocco: \$5.5 million
- South Africa: \$4.1 million

**WOOD & VEGETABLE MATERIAL**

The DRC has the potential to increase its exports of wood to Africa by \$8.3 million – \$7.6 million under current tariff conditions and another \$727,000 if intra-African tariffs are fully removed.

COMESA markets hold \$6.7 million (81%) of this potential, mainly:

- Kenya: \$5.8 million
- Egypt: \$0.8 million

Other African markets hold \$1.6 million (19%) of this potential, mainly:

- South Africa: \$0.9 million
- Morocco: \$0.5 million

Note: Coloured countries are African countries in which the exporter has unrealized potential in this product. Bubbles and labels show total export growth potential under AfCFTA, per market.

## Djibouti

Djibouti has an export potential to the world of \$115 million. COMESA is the destination for about 5% of Djibouti's export potential, while the rest of Africa only plays a very limited role with less than 1%.

Joining the AfCFTA would increase Djibouti's export potential to COMESA by 1.4% and export potential to the rest of Africa by 23% (under the assumption that all other African countries have joined as well).

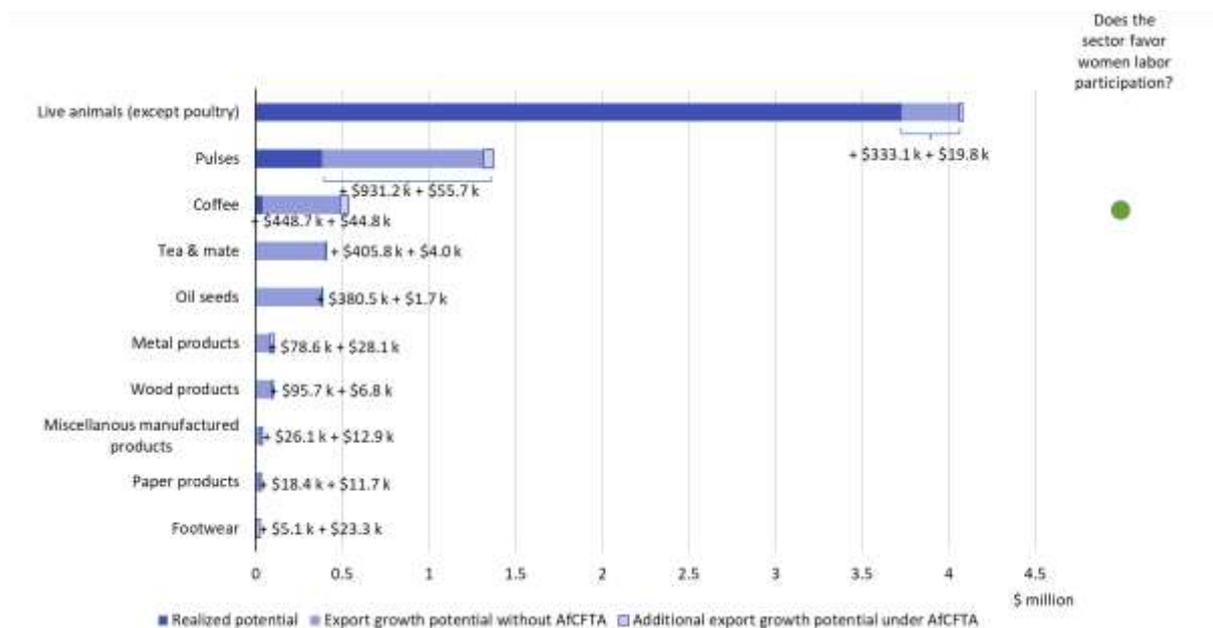
Live animals is the most important subsector with export potential to Africa. It represents \$4.1 million, or 57% of the country's total export potential to the region. Only a relatively small part of this export potential, about \$333,100 is still untapped. Joining the AfCFTA would increase export growth potential by \$20,000.<sup>6</sup> The products with the highest export growth potential in this subsector are live mammals (\$129,700), live sheep (\$113,000) and live goats (\$110,100).

The second most important subsector with export potential is pulses (\$1.4 million). For this subsector, a large share of export potential is still untapped, leaving room to increase exports by \$931,200 – plus another \$55,700 if Djibouti joins the AfCFTA. The products with the highest export growth potential are chickpeas (\$557,400) and kidney beans (\$493,500).

Coffee has an export potential of \$534,500, which also remains largely unexploited. The potential for export growth is \$448,700. It could increase by \$44,800 if Djibouti joins the AfCFTA. The “manufacture of food products and beverages industry” under which coffee features a high share of female labour participation in Djibouti.

For the other subsectors, information on female labour force participation is not available for the corresponding industry in Djibouti.

Figure 11 Djibouti: Total realized and unrealized export potential to Africa, by product



Note: Green dots show products belonging to sectors in which the share of women employees is above the national average or above 50% but smaller than the national average. Yellow dots symbolize sectors in which the share of women is close to average (less than 10% below average). Red dots stand for sectors in which the share of women is more than 10% below the national average. Labels indicate total export growth potential per product.

<sup>6</sup> Under the assumption that all other African countries have joined, too.

Figure 12 Djibouti: Export growth potential for selected products, to African countries



**PULSES**

Djibouti has the potential to increase its exports of pulses to Africa by \$986,900 – \$931,200 under current tariff conditions and another \$55,700 if intra-African tariffs are fully removed.

COMESA markets hold \$786,800 (80%) of this potential, mainly:

- Egypt: \$744,800

Other African markets hold \$200,100 (20%) of this potential, mainly:

- Angola: \$114,300
- Congo: \$67,800



**COFFEE**

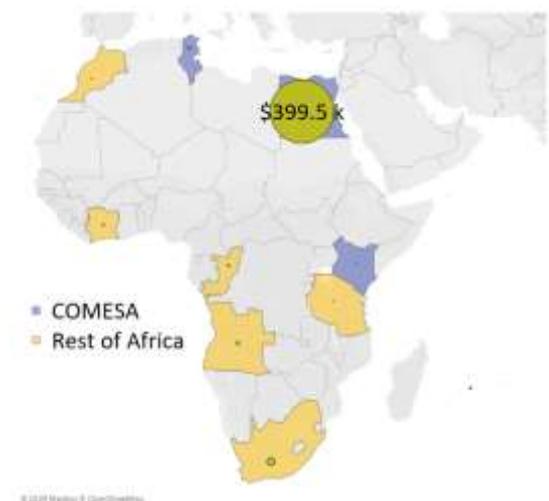
Djibouti has the potential to increase its exports of coffee to Africa by \$493,500 – \$448,700 under current tariff conditions and another \$44,800 if intra-African tariffs are fully removed.

COMESA markets hold \$481,500 (98%) of this potential, mainly:

- Egypt: \$414,800

- Tunisia: \$66,600

Other African markets hold \$12,000 (2%) of this potential.



**TEA**

Djibouti has the potential to increase its exports of tea to Africa by \$409,800 – \$405,800 under current tariff conditions and another \$4,000 if intra-African tariffs are fully removed.

Virtually all of this potential lies in Egypt, which is a COMESA market.

Note: Coloured countries are African countries in which the exporter has unrealized potential in this product. Bubbles and labels show total export growth potential under AfCFTA, per market.

## Egypt

Egypt has an export potential to the world of \$31.1 billion. COMESA is the destination for about 10% of Egypt’s export potential, and the rest of Africa for 8%.

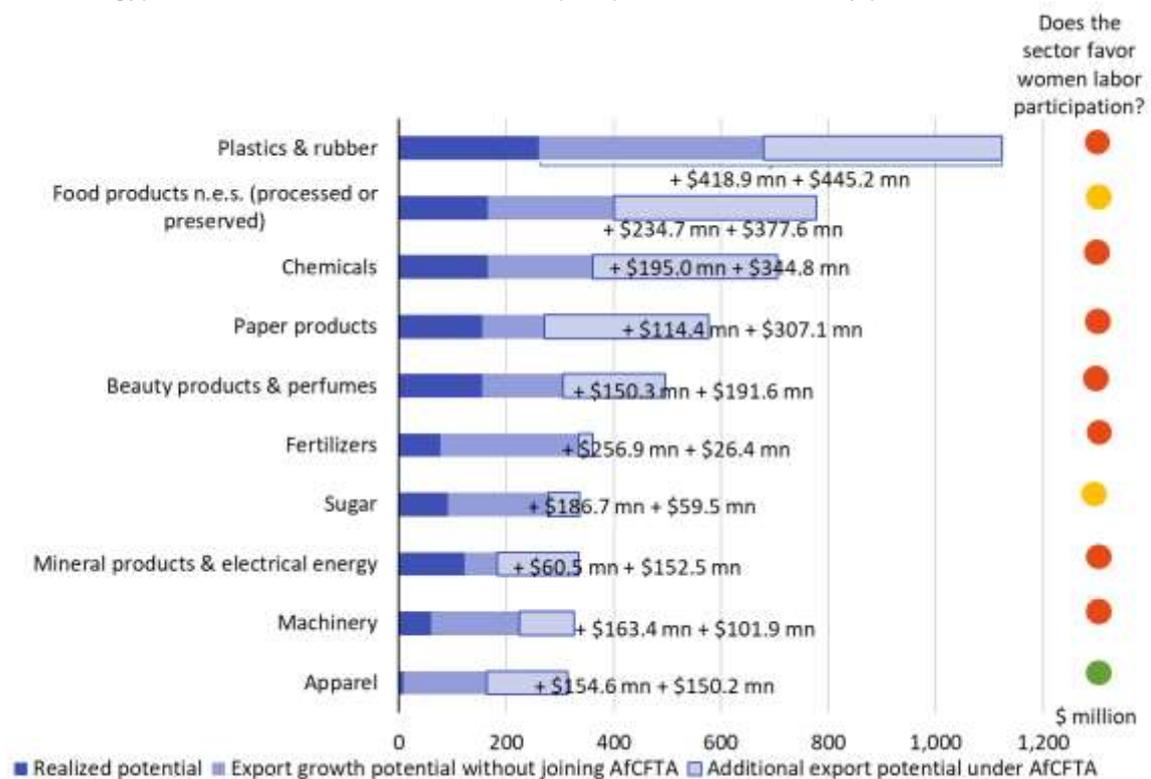
Joining the AfCFTA would increase Egypt’s export potential to COMESA by 23% and export potential to the rest of Africa by 118% (under the assumption that all other African countries have joined as well).

Plastics and rubber is the most important subsector with export potential to Africa. It represents \$1.1 billion, or 13% of the country’s total export potential to the region. Of this export potential, about \$418.9 million is still untapped. Joining the AfCFTA would increase export growth potential by \$445.2 million.<sup>7</sup> The product with the highest export growth potential in this subsector is polypropylene (\$204.1 million), followed by polyethylene with a specific gravity of  $\geq 0.94$  (\$139.6 million).

The second most important subsector with export potential is food products (\$778.4 million). Part of this potential is still untapped, leaving room to increase exports by \$234.7 million– plus another \$377.6 million if Egypt joins the AfCFTA. The products with the highest export growth potential are active yeasts (\$103.4 million), uncooked pasta (\$78.9 million), sweet biscuits (\$70.2 million) and processed tomatoes (\$62.1 million). Manufacture of food and beverages has a higher share of female labour in Egypt than most other industries with high export potential.

Chemicals has an export potential of \$705.2 million. The potential for export growth is \$195 million. It could increase by \$344.8 million if Egypt joins the AfCFTA.

Figure 13 Egypt: Total realized and unrealized export potential to Africa, by product



Note: Green dots show products belonging to sectors in which the share of women employees is above the national average or above 50% but smaller than the national average. Yellow dots symbolize sectors in which the share of women is close to average (less than 10% below average). Red dots stand for sectors in which the share of women is more than 10% below the national average. Labels indicate total export growth potential per product.

<sup>7</sup> Under the assumption that all other African countries have joined, too.

Figure 14 Egypt: Export growth potential for selected products, to African countries



**PLASTICS & RUBBER**

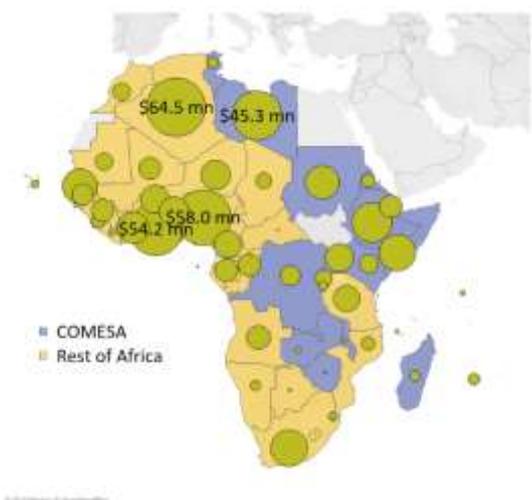
Egypt has the potential to increase its exports of plastics and rubber to Africa by \$864 million – \$418.9 million under current tariff conditions and another \$445.2 million if intra-African tariffs are fully removed.

COMESA markets hold \$463.5 million (54%) of this potential, mainly:

- Djibouti: \$158.9 million
- Ethiopia: \$86.3 million

Other African markets hold \$400.5 million (46%) of this potential, mainly:

- Nigeria: \$108.1 million
- Algeria: \$87.1 million



**FOOD PRODUCTS**

Egypt has the potential to increase its exports of food products to Africa by \$612.3 million – \$234.7 million under current tariff conditions and another \$377.6 million if intra-African tariffs are fully removed.

COMESA markets hold \$179.9 million (29%) of this potential, mainly:

- Libya: \$45.3 million

Other African markets hold \$432.4 million (71%) of this potential, mainly:

- Algeria: \$64.5 million
- Nigeria: \$58.0 million
- Ghana: \$54.3 million



**CHEMICALS**

Egypt has the potential to increase its exports of chemicals to Africa by \$539.7 million – \$195 million under current tariff conditions and another \$344.8 million if intra-African tariffs are fully removed.

COMESA markets hold \$100.4 million (19%) of this potential.

Other African markets hold \$439.3 million (81%) of this potential, mainly:

- Algeria: \$83.8 million
- Morocco: \$64.7 million
- South Africa: \$49.5 million

Note: Coloured countries are African countries in which the exporter has unrealized potential in this product. Bubbles and labels show total export growth potential under AfCFTA, per market.

## Eritrea

Eritrea has an export potential to the world of \$5.8 million. COMESA is the destination for about 46% of Eritrea’s export potential, while the rest of Africa plays a very limited role with less than 1%.

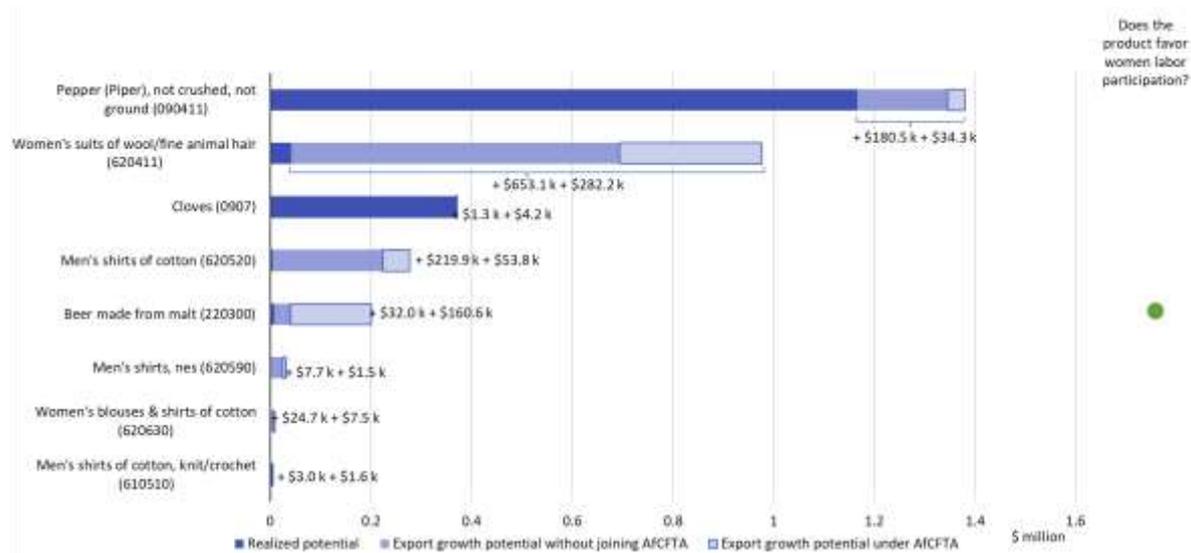
Joining the AfCFTA would increase Eritrea’s export potential to COMESA by about 20% and export potential to the rest of Africa by 160% (under the assumption that all other African countries have joined as well).

Pepper is the most important product with export potential to Africa. It represents \$1.4 million, or 42% of the country’s total export potential to the region, out of which \$180,500 is still untapped. Joining the AfCFTA would increase export growth potential by \$34,300.<sup>8</sup>

The second most important product with export potential are women’s suits of wool (\$976,500). Most of this export potential is still untapped, leaving room to increase exports by \$653,100 – plus another \$282,200 if Eritrea joins the AfCFTA.

Cloves have an export potential of \$372,000, which is almost fully realized already. Export growth opportunities are higher in the fourth and fifth sectors with export potential, men’s shirts of cotton and beer made from malt. The manufacturing of food products and beverages in which the latter falls features a high share of female labour in Eritrea. For the other sectors, this information is not available.

Figure 15 Eritrea: Total realized and unrealized export potential to Africa, by product



Note: Green dots show products belonging to sectors in which the share of women employees is above the national average or above 50% but smaller than the national average. Yellow dots symbolize sectors in which the share of women is close to average (less than 10% below average). Red dots stand for sectors in which the share of women is more than 10% below the national average. Labels indicate total export growth potential per product.

<sup>8</sup> Under the assumption that all other African countries have joined, too.

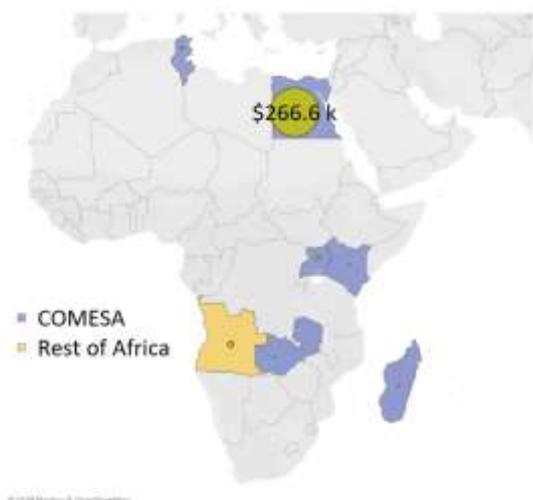
Figure 16 Eritrea: Export growth potential for selected products, to African countries



**WOMEN'S SUITS OF WOOL**

Eritrea has the potential to increase its exports of women's suits to Africa by \$935,300 – \$653,100 under current tariff conditions and another \$282.2 if intra-African tariffs are fully removed.

Virtually all of this potential lies in COMESA, and more precisely, in Egypt.



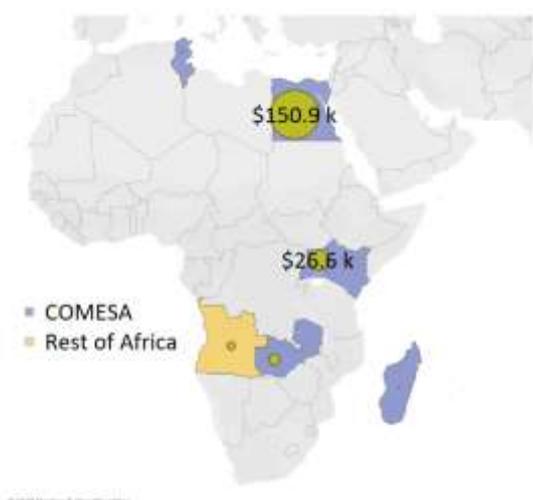
**MEN'S SHIRTS OF COTTON**

Eritrea has the potential to increase its exports of men's shirts of cotton to Africa by \$277,400 under current tariff conditions.

COMESA markets hold \$269,500 million (98%) of this potential, mainly:

- Egypt: \$266,600

Other African markets hold \$4,200 (2%) of this potential.



**BEER**

Eritrea has the potential to increase its exports of beer to Africa by \$200,600 – \$32,000 under current tariff conditions and another \$160,600 if intra-African tariffs are fully removed.

COMESA markets hold \$193,700 (96%) of this potential, mainly:

- Egypt: \$150,900
- Uganda: \$26,600

Other African markets hold \$6,800 (4%) of this potential.

Note: Coloured countries are African countries in which the exporter has unrealized potential in this product. Bubbles and labels show total export growth potential under AfCFTA, per market.

## Eswatini

Eswatini has an export potential to the world of \$2.1 billion. COMESA is the destination for about 16% of Eswatini's export potential, and the rest of Africa for 8%.

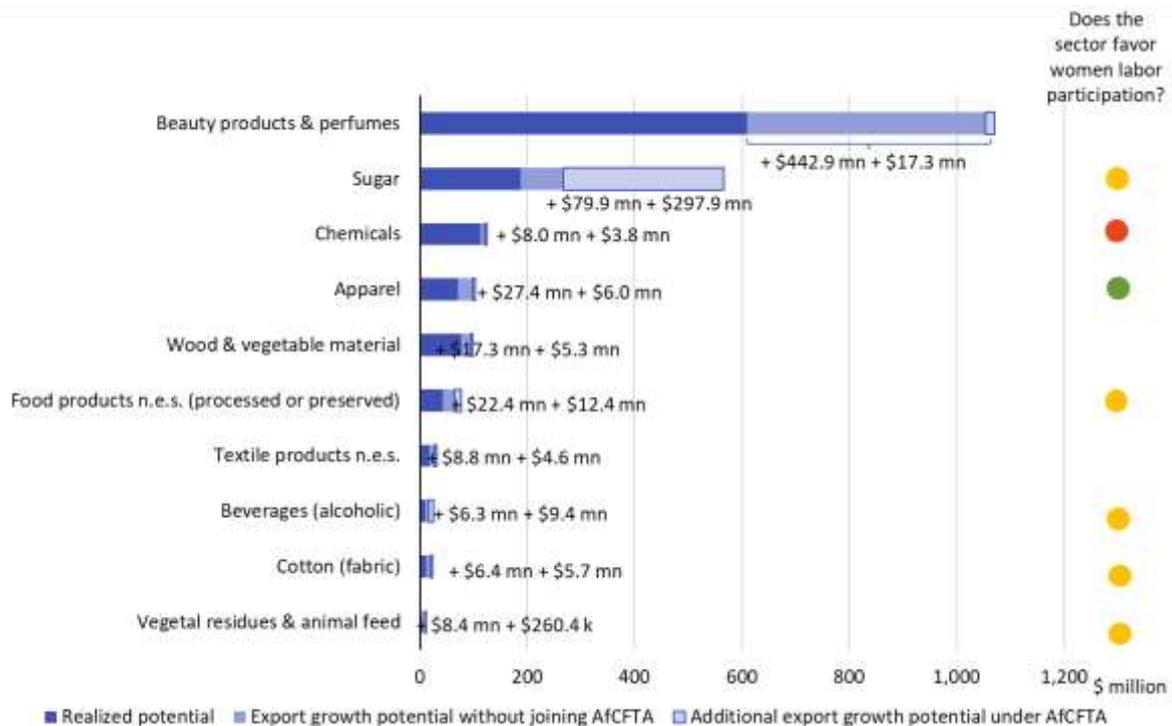
Joining the AfCFTA would increase Eswatini's export potential to COMESA by 107% and export potential to the rest of Africa by 4.6% (under the assumption that all other African countries have joined as well).

Beauty products and perfumes is the most important subsector with export potential to Africa. It represents \$1.1 billion, or 49% of the country's total export potential to the region. Of this export potential, about \$442.9 million is still untapped. Joining the AfCFTA would increase export growth potential by \$17.3 million.<sup>9</sup> The product with the highest export growth potential in this subsector is mixtures of odoriferous substances used in food & drink, which accounts for 99.9% of total export potential to Africa. Information on the share of female labour is not available for this sector.

The second most important subsector with export potential is sugar (\$565.5 million). Part of this potential is currently untapped, leaving room to increase exports by \$79.9 million. The removal of intra-African tariffs would add another \$297.9 million. The products with the highest export growth potential is raw cane sugar (\$492.2 million), followed by cane or beet sugar (\$41.4 million).

Chemicals has an export potential of \$125 million. Untapped export potential in this sector is very low. Despite their smaller overall export potential, opportunities for export growth are larger in apparel, wood and vegetable materials and food products. The apparel sector has a higher share of female labour in Eswatini than most other industries with high export potential.

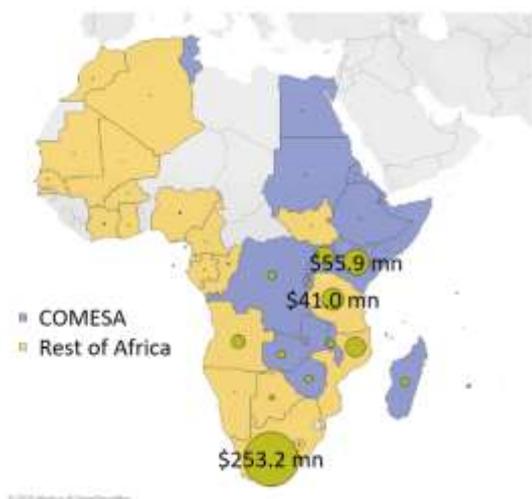
Figure 17 Eswatini: Total realized and unrealized export potential to Africa, by product



Note: Green dots show products belonging to sectors in which the share of women employees is above the national average or above 50% but smaller than the national average. Yellow dots symbolize sectors in which the share of women is close to average (less than 10% below average). Red dots stand for sectors in which the share of women is more than 10% below the national average. Labels indicate total export growth potential per product.

<sup>9</sup> Under the assumption that all other African countries have joined, too.

Figure 18 Eswatini: Export growth potential for selected products, to African countries



### BEAUTY PRODUCTS & PERFUMES

Eswatini has the potential to increase its exports of beauty products and perfumes to Africa by \$460.2 million – \$442.9 million under current tariff conditions and another \$17.3 million if intra-African tariffs are fully removed.

COMESA markets hold \$111.8 million (24%) of this potential, mainly:

- Kenya: \$55.9 million

Other African markets hold \$348.4 million (76%) of this potential, mainly:

- South Africa: \$253.2 million
- United Republic of Tanzania: \$41.0 million



### SUGAR

Eswatini has the potential to increase its exports of sugar to Africa by \$377.8 million – \$79.9 million under current tariff conditions and another \$297.9 million if intra-African tariffs are fully removed.

COMESA markets hold \$274.9 million (73%) of this potential, mainly:

- Kenya: \$253.7 million

Other African markets hold \$102.9 million (27%) of this potential, mainly:

- Nigeria: \$73.1 million
- United Republic of Tanzania: \$11.9 million



### APPAREL

Eswatini has the potential to increase its exports of apparel to Africa by \$33.4 million – \$27.4 million under current tariff conditions and another \$6 million if intra-African tariffs are fully removed.

COMESA markets hold \$5.5 million (9%) of this potential.

Other African markets hold \$27.9 million (91%) of this potential, mainly:

- Namibia: \$9.8 million
- South Africa: \$8.0 million
- Nigeria: \$4.3 million

Note: Coloured countries are African countries in which the exporter has unrealized potential in this product. Bubbles and labels show total export growth potential under AfCFTA, per market.

## Ethiopia

Ethiopia has an export potential to the world of \$4.6 billion. COMESA is the destination for about 6% of Ethiopia's export potential. The rest of Africa plays a very limited role as an export market, with less than 1%.

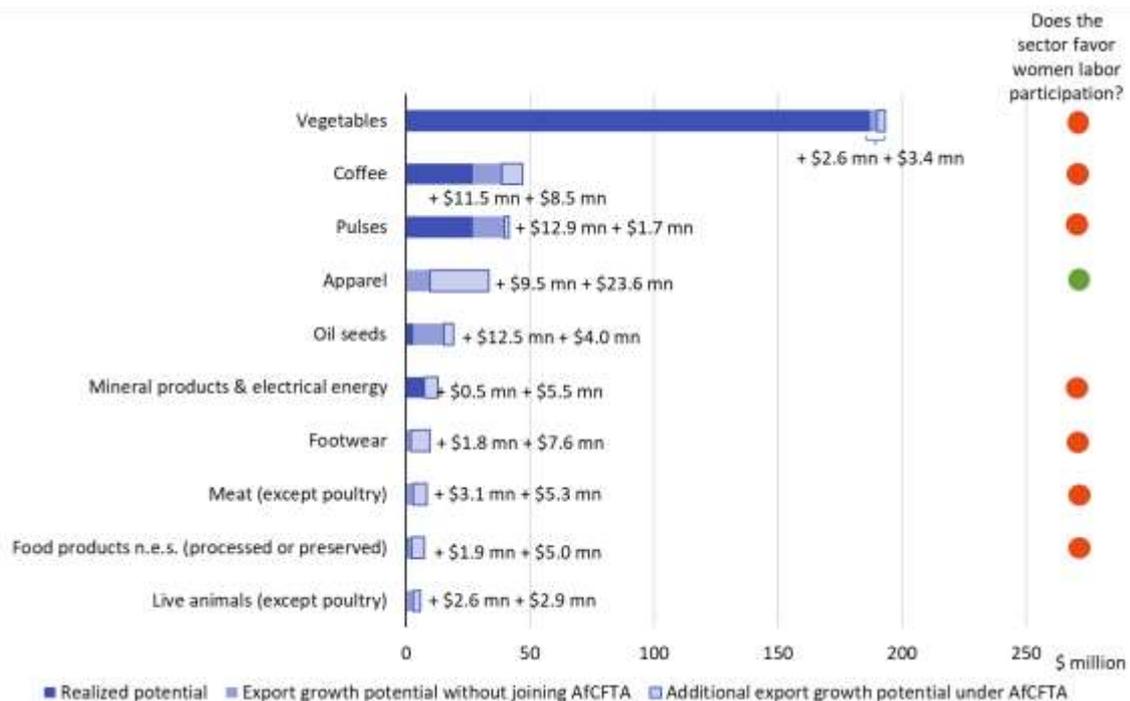
Joining the AfCFTA would increase Ethiopia's export potential to COMESA by 9.2% and export potential to the rest of Africa by 216% (under the assumption that all other African countries have joined as well).

Vegetables is by far the most important subsector with export potential to Africa. It represents \$193.1 million, or 48% of the country's total export potential to the region. Of this export potential, only about \$2.6 million is still untapped. Joining the AfCFTA would increase export growth potential by \$3.4 million.<sup>10</sup> The products with the highest export growth potential in this subsector include fresh or chilled vegetables (\$2.7 million) and potatoes (\$2.1 million).

The second most important subsector with export potential is coffee (\$47 million). Part of this potential is currently untapped, leaving room to increase exports by \$11.5 million. The removal of intra-African tariffs would add another \$8.5 million. Pulses have an export potential of \$41.5 million, out of which \$12.9 is still untapped. Another \$1.7 could be added if Ethiopia joins the AfCFTA. While its total export potential is lower, apparel has the highest export growth potential among all sectors. Untapped export potential stands at \$9.5 million, to which AfCFTA could add another \$23.6 million. The oil seeds subsector is in a similar situation, with an untapped export potential of \$12.5 million and another \$4 million that could be added if Ethiopia joins the AfCFTA.

The apparel sector has a higher share of female labour in Ethiopia than the other industries with high export potential.

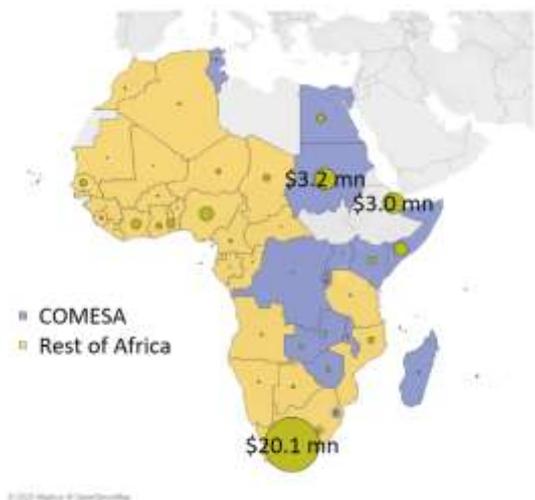
Figure 19 Ethiopia: Total realized and unrealized export potential to Africa, by product



Note: Green dots show products belonging to sectors in which the share of women employees is above the national average or above 50% but smaller than the national average. Yellow dots symbolize sectors in which the share of women is close to average (less than 10% below average). Red dots stand for sectors in which the share of women is more than 10% below the national average. Labels indicate total export growth potential per product.

<sup>10</sup> Under the assumption that all other African countries have joined, too.

Figure 20 Ethiopia: Export growth potential for selected products, to African countries



**APPAREL**

Ethiopia has the potential to increase its exports of apparel to Africa by \$33 million – \$9.5 million under current tariff conditions and another \$23.6 million if intra-African tariffs are fully removed.

COMESA markets hold \$8.7 million (26%) of this potential, mainly:

- Sudan: \$3.2 million
- Djibouti: \$3.0 million

Other African markets hold \$24.3 million (74%) of this potential, mainly:

- South Africa: \$20.1 million



**COFFEE**

Ethiopia has the potential to increase its exports of coffee to Africa by \$19.9 million – \$11.5 million under current tariff conditions and another \$8.5 million if intra-African tariffs are fully removed.

COMESA markets hold \$8.8 million (44%) of this potential, mainly:

- Egypt: \$2.0 million

Other African markets hold \$11.1 million (56%) of this potential, mainly:

- Algeria: \$5.3 million
- South Africa: \$3.3 million



**OIL SEEDS**

Ethiopia has the potential to increase its exports of oil seeds to Africa by \$16.5 million – \$12.5 million under current tariff conditions and another \$4 million if intra-African tariffs are fully removed.

COMESA markets hold \$13.3 million (81%) of this potential, mainly:

- Egypt: \$7.7 million
- Kenya: \$3.1 million

Other African markets hold \$3.2 million (9%) of this potential, mainly:

- South Africa: \$2.2 million

Note: Coloured countries are African countries in which the exporter has unrealized potential in this product. Bubbles and labels show total export growth potential under AfCFTA, per market.

## Kenya

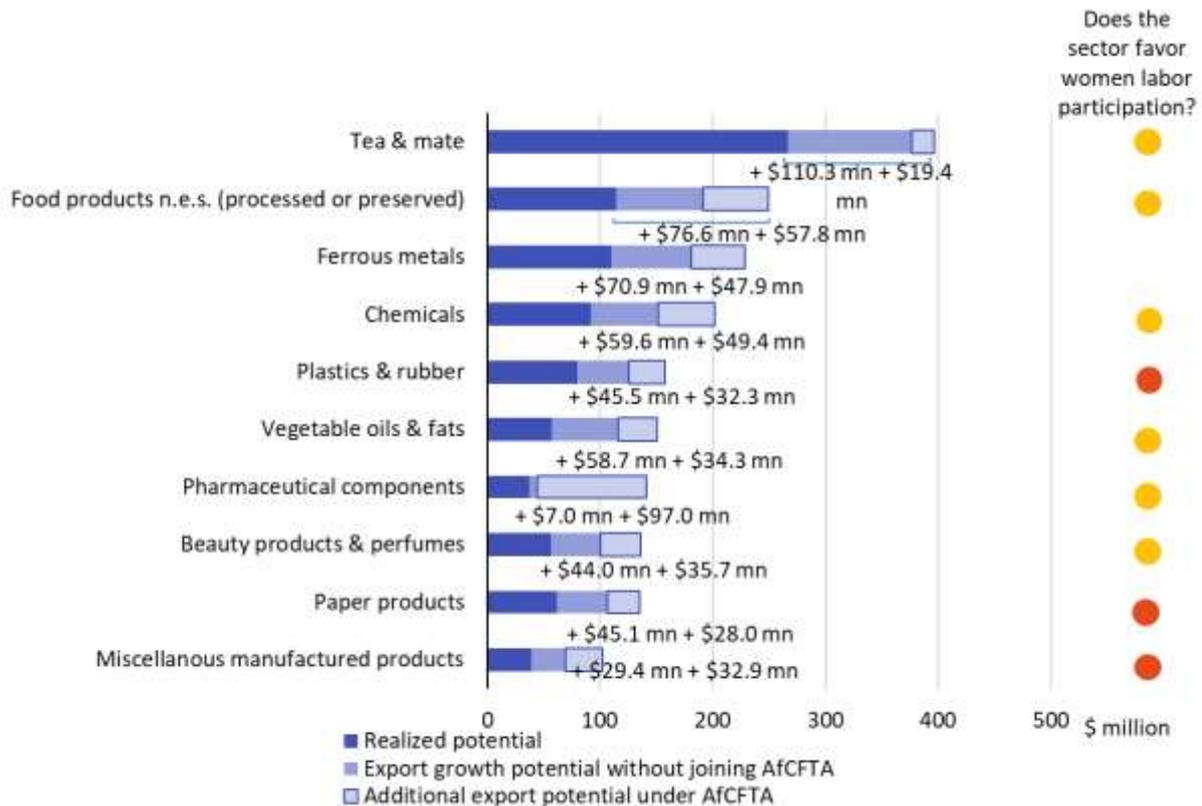
Kenya has an export potential to the world of \$7.5 billion. COMESA is the destination for about 23% of Kenya’s export potential, while the rest of Africa accounts for 7%.

Joining the AfCFTA would increase Kenya’s export potential to COMESA by 26% and export potential to the rest of Africa by 54% (under the assumption that all other African countries have joined as well).

Tea and mate is the most important subsector with export potential to Africa. It represents \$396.1 million, or 14% of Kenya’s total export potential to the region, out of which \$110.3 million are still untapped. Joining the AfCFTA would increase export growth potential by \$19.4 million. The products with the highest export growth potential in this subsector is black tea in packs > 3kg (\$123.2 million).

The second most important subsector in terms of total export potential is processed and preserved food (\$249.1 million), followed by ferrous metals (\$228.8 million). In both of these subsectors, a significant part of export potential to Africa remains untapped, and export potential could grow significantly if Kenya joins the AfCFTA. In the processed and preserved food subsector, the products with the highest export growth potential are chewing gum (\$35.5 million), sugar confectionary not containing cocoa (\$18.1 million) and food preparations not elsewhere specified (\$17 million). In the ferrous metals subsector, the top export potential products include different flat or flat-rolled products, and bars and rods of iron or non-alloy steel.

Figure 21 Kenya: Total realized and unrealized export potential to Africa, by product



Note: Green dots show products belonging to sectors in which the share of women employees is above the national average or above 50% but smaller than the national average. Yellow dots symbolize sectors in which the share of women is close to average (less than 10% below average). Red dots stand for sectors in which the share of women is more than 10% below the national average. Labels indicate total export growth potential per product.

Figure 22 Kenya: Export growth potential for selected products, to African countries



**TEA**

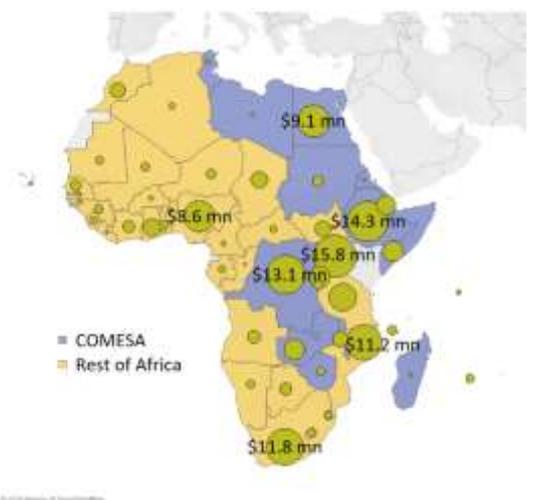
Kenya has the potential to increase its exports of tea in Africa by \$129.7 million - \$110.3 million under current tariff conditions and another \$19.5 million if intra-African tariffs are fully removed.

COMESA markets hold \$85.6 million (66%) of this potential, mainly:

- Egypt: \$73.6 million

Other African markets hold \$44.1 million (34%) of this potential, mainly:

- South Africa: \$16.9 million
- Nigeria: \$4.5 million



**FOOD PRODUCTS**

Kenya has the potential to increase its exports of food products in Africa by \$134.4 million - \$76.6 million under current tariff conditions and another \$57.8 million if intra-African tariffs are fully removed.

COMESA markets hold \$74.0 million (55%) of this potential, mainly:

- Uganda: \$15.8 million
- Ethiopia: \$14.3 million
- Democratic Republic of the Congo: \$13.1 million

Other African markets hold \$60.4 million (45%) of this potential.



**FERROUS METALS**

Kenya has the potential to increase its exports of ferrous metals in Africa by \$118.8 million - \$70.9 million under current tariff conditions and another \$47.9 million if intra-African tariffs are fully removed.

COMESA markets hold \$89.9 million (76%) of this potential, mainly:

- Ethiopia: \$24.5 million
- Uganda: \$22.5 million

Other African markets hold \$28.9 million (24%) of this potential, mainly:

- United Republic of Tanzania: \$12.9 million

Note: Coloured countries are African countries in which the exporter has unrealized potential in this product. Bubbles and labels show total export growth potential under AfCFTA, per market.

## Libya

Libya has an export potential to the world of \$309.8 million. COMESA is the destination for about 11% of Libya's export potential, while the rest of Africa accounts for 7%.

Joining the AfCFTA would increase Libya's export potential to COMESA by less than 0.1% and export potential to the rest of Africa by 25% (under the assumption that all other African countries have joined as well).

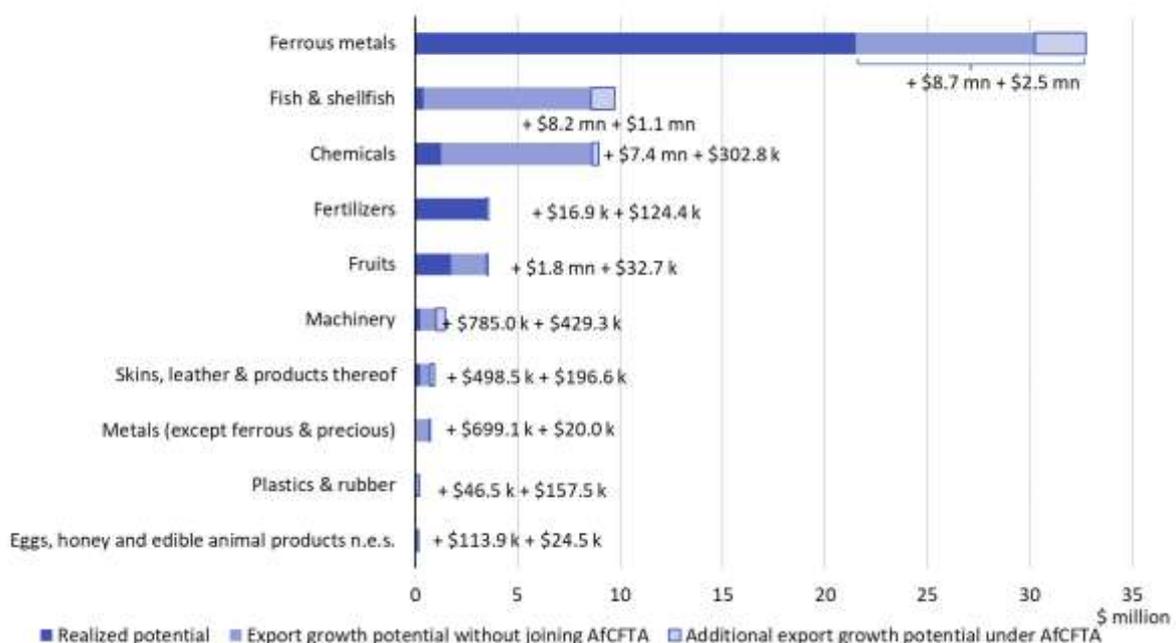
Ferrous metals is the most important subsector with export potential to Africa. It represents \$32.7 million, or 53% of Libya's total export potential to the region, out of which \$8.7 million are still untapped. Joining the AfCFTA would increase export growth potential by \$2.5 million. The products with the highest export growth potential in this subsector are semi-finished products of iron or steel (\$5.4 million) and u sections of iron or steel (\$2.4 million).

The second most important subsector in terms of total export potential is fish and shellfish (\$9.7 million), followed by chemicals (\$8.9 million). In both of these subsectors, a significant part of export potential to Africa remains untapped - \$8.2 million and \$7.4 million, respectively. Joining the AfCFTA could allow export potential grow even further.

In the fish and shellfish subsector, the products with the highest export growth potential are live fish (\$6.4 million) and frozen tuna (\$2.6 million). In the chemicals subsector, the top export potential products include anhydrous ammonia (\$7.2 million) and Methanol "methyl alcohol" (\$1.3 million).

Information on female labour force participation is not available for Libya.

Figure 23 Libya: Total realized and unrealized export potential to Africa, by product



Note: Green dots show products belonging to sectors in which the share of women employees is above the national average or above 50% but smaller than the national average. Yellow dots symbolize sectors in which the share of women is close to average (less than 10% below average). Red dots stand for sectors in which the share of women is more than 10% below the national average. Labels indicate total export growth potential per product.

Figure 24 Libya: Export growth potential for selected products, to African countries



**FERROUS METALS**

Libya has the potential to increase its exports of ferrous metals in Africa by \$11.2 million - \$8.7 million under current tariff conditions and another \$2.5 million if intra-African tariffs are fully removed.

COMESA markets hold \$6.5 million (57%) of this potential, mainly:

- Egypt: \$5.1 million
- Tunisia: \$1.3 million

Other African markets hold \$4.8 million (43%) of this potential, mainly:

- Ghana: \$3.1 million



**FISH**

Libya has the potential to increase its exports of fish in Africa by \$9.3 million - \$8.2 million under current tariff conditions \$1.1 million if intra-African tariffs are fully removed.

COMESA markets hold \$6.5 million (70%) of this potential, mainly:

- Tunisia: \$6.3 million

Other African markets hold \$2.8 million (30%) of this potential, mainly:

- Côte d'Ivoire: \$1.8 million
- Ghana: \$914,200



**CHEMICALS**

Libya has the potential to increase its exports of chemicals in Africa by \$7.7 million - \$7.4 million under current tariff conditions and another \$303,000 million if intra-African tariffs are fully removed.

COMESA markets hold \$1.4 million (18%) of this potential, mainly:

- Egypt: \$1.0 million

Other African markets hold \$6.3 million (82%) of this potential, mainly:

- Morocco: \$5.7 million
- Ghana: \$416,500

Note: Coloured countries are African countries in which the exporter has unrealized potential in this product. Bubbles and labels show total export growth potential under AfCFTA, per market.

## Madagascar

Madagascar has an export potential to the world of \$3.8 billion. COMESA is the destination for about 2.1% of Madagascar's export potential, while the rest of Africa accounts for 5.1%.

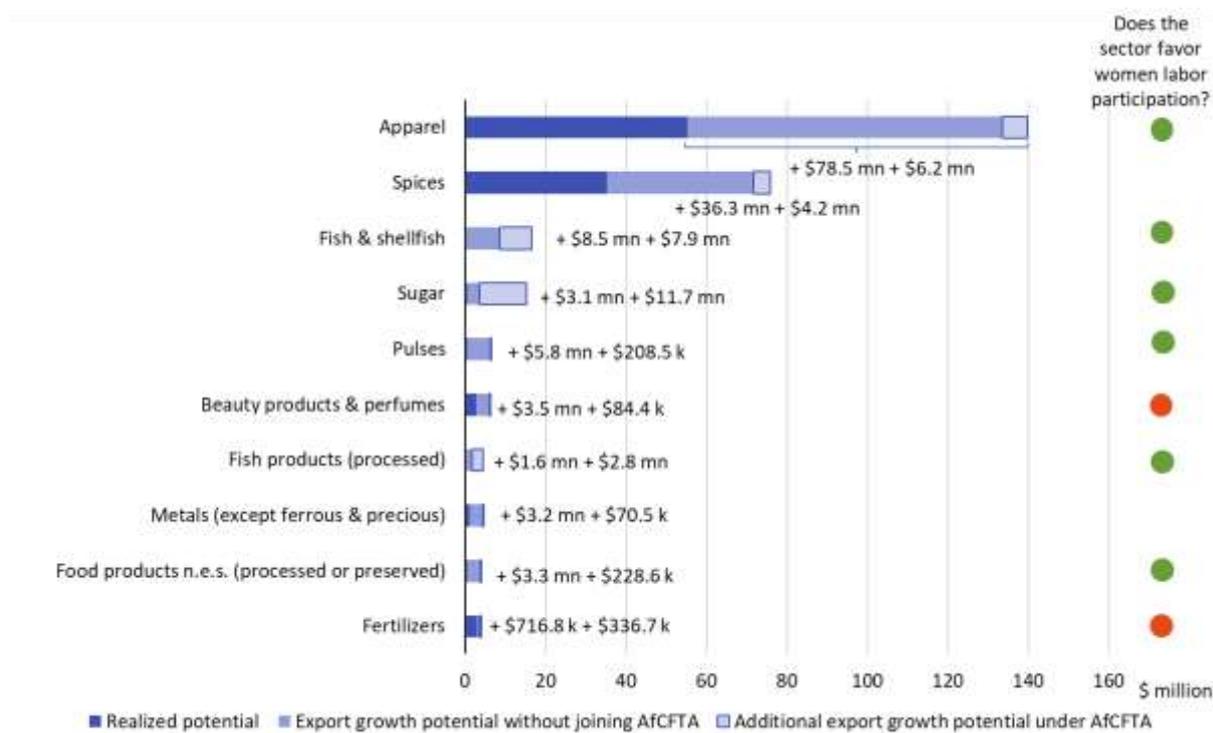
Joining the AfCFTA would increase Madagascar's export potential to COMESA by 3% and export potential to the rest of Africa by 19% (under the assumption that all other African countries have joined as well).

Apparel is the most important subsector with export potential to Africa. It represents \$140 million, or 47% of Madagascar's total export potential to the region, out of which \$78 million are still untapped. Joining the AfCFTA would increase export growth potential by \$6.2 million. The apparel sector employs a relatively large share of women in Madagascar.

The second most important subsector in terms of total export potential is spices (\$75.8 million). As in apparel, a relatively large share of this export potential is untapped, leaving room to increase exports by \$36 million – plus another \$4.2 million if Madagascar joins the AfCFTA. The spices with the highest export growth potential are vanilla (\$27.8 million), cloves (\$8.9 million) and pepper (\$1.8 million).

In both the fish and the sugar subsector, Madagascar's current exports to Africa are very low, which implies that most of the export potential in these sectors is still untapped. Respectively, \$8.5 million and \$3.1 million are untapped, and joining the AfCFTA could allow further export growth of \$7.9 million and \$11.7 million. Both sectors feature a high share of female labour force participation in Madagascar.

Figure 25 Madagascar: Total realized and unrealized export potential to Africa, by product



Note: Green dots show products belonging to sectors in which the share of women employees is above the national average or above 50% but smaller than the national average. Yellow dots symbolize sectors in which the share of women is close to average (less than 10% below average). Red dots stand for sectors in which the share of women is more than 10% below the national average. Labels indicate total export growth potential per product.

Figure 26 Madagascar: Export growth potential for selected products, to African countries



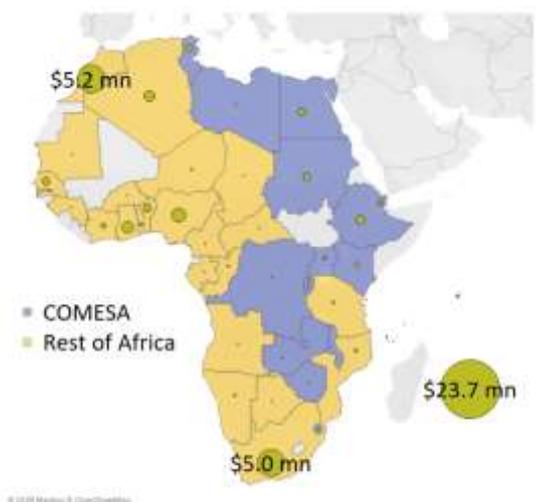
**APPAREL**

Madagascar has the potential to increase its exports of apparel in Africa by \$84.7 million - \$78.5 million under current tariff conditions and another \$6.2 million if intra-African tariffs are fully removed.

COMESA markets hold \$5.5 million (7%) of this potential.

Other African markets hold \$79.1 million (93%) of this potential, mainly:

- South Africa: \$64.1 million
- Morocco: \$6.8 million
- United Republic of Tanzania: \$3.4 million



**SPICES**

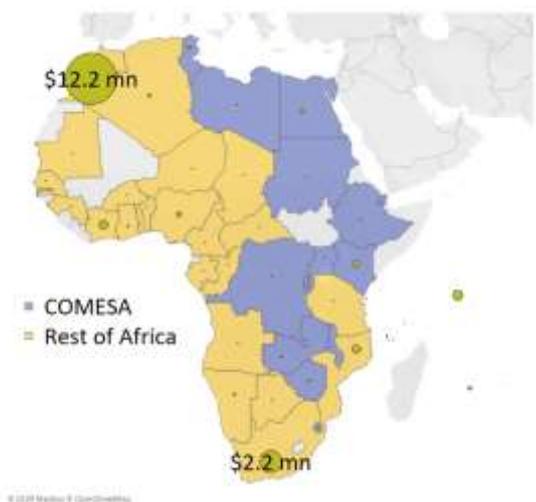
Madagascar has the potential to increase its exports of spices in Africa by \$40.5 million - \$36.3 million under current tariff conditions and another \$4.2 million if intra-African tariffs are fully removed.

COMESA markets hold \$25.8 million (64%) of this potential, mainly:

- Mauritius: \$23.7 million

Other African markets hold \$14.7 million (36%) of this potential, mainly:

- Morocco: \$5.2 million
- South Africa: \$5.0 million



**FISH**

Madagascar has the potential to increase its exports of fish in Africa by \$16.4 million - \$8.5 million under current tariff conditions and another \$7.9 million if intra-African tariffs are fully removed.

COMESA markets hold \$964,000 (6%) of this potential, mainly:

- Seychelles: \$474,000

Other African markets hold \$15.4 million (94%) of this potential, mainly:

- Morocco: \$12.2 million
- South Africa: \$2.2 million

Note: Coloured countries are African countries in which the exporter has unrealized potential in this product. Bubbles and labels show total export growth potential under AfCFTA, per market.

## Malawi

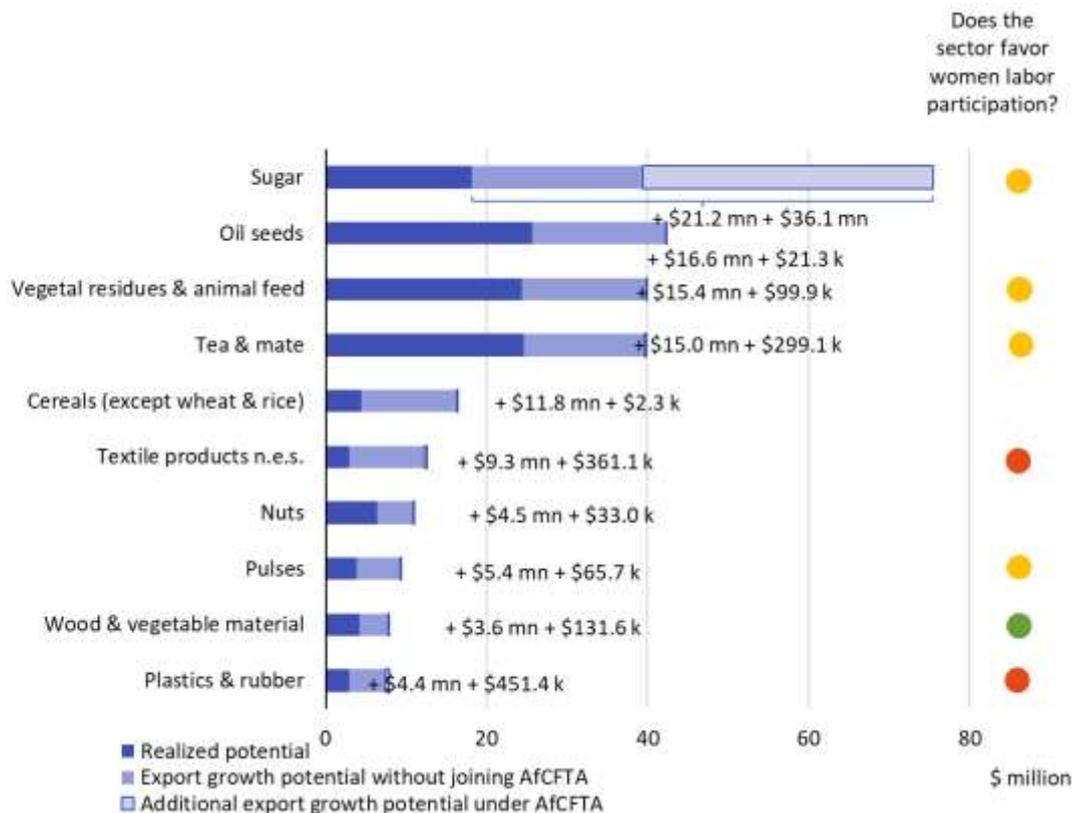
Malawi has an export potential to the world of \$555 million. COMESA is the destination for about 26% of Malawi's export potential, while the rest of Africa accounts for 28%.

Joining the AfCFTA would increase Malawi's export potential to COMESA by 2.6% and export potential to the rest of Africa by 25% (under the assumption that all other African countries have joined as well).

Sugar is the most important subsector with export potential to Africa. It represents \$75.5 million, or 27% of Malawi's total export potential to the region, out of which \$21.2 million are still untapped. Malawi's sugar sector could reap large benefits if the country joined the AfCFTA, with an increase in export growth potential of \$36.1 million.

The second, third, and fourth most important subsectors have similar total export potential: oils seeds (\$42.3 million), vegetal residues and animal feed (\$39.9 million), and tea and mate (\$39.9 million). Their untapped export potential is relatively similar, too – with \$16.6 million, \$15.4 million and \$15 million, respectively. Finally, in all three sectors, export potential gains from joining the AfCFTA are limited. In the oil seeds subsector, the products with highest export growth potential are groundnuts (\$11.8 million) and soya beans (\$4.4 million). In Malawi's vegetal residues sector, the main product with export growth potential is oil cakes (\$14.1 million).

Figure 27 Malawi: Total realized and unrealized export potential to Africa, by product



Note: Green dots show products belonging to sectors in which the share of women employees is above the national average or above 50% but smaller than the national average. Yellow dots symbolize sectors in which the share of women is close to average (less than 10% below average). Red dots stand for sectors in which the share of women is more than 10% below the national average. Labels indicate total export growth potential per product.

Figure 28 Malawi: Export growth potential for selected products, to African countries



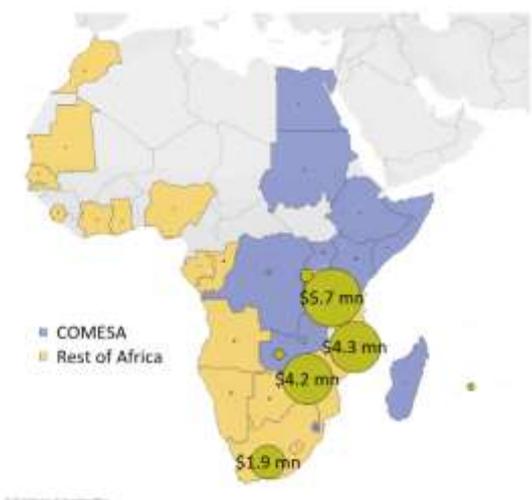
**SUGAR**

Malawi has the potential to increase its exports of sugar in Africa by \$57.4 million - \$21.2 million under current tariff conditions and another \$36.2 million if intra-African tariffs are fully removed.

COMESA markets hold \$6.3 million (11%) of this potential.

Other African markets hold \$51.1 million (89%) of this potential, mainly:

- South Africa: \$25.5 million
- United Republic of Tanzania: \$11.7 million
- Mozambique: \$11.2 million



**OIL SEEDS**

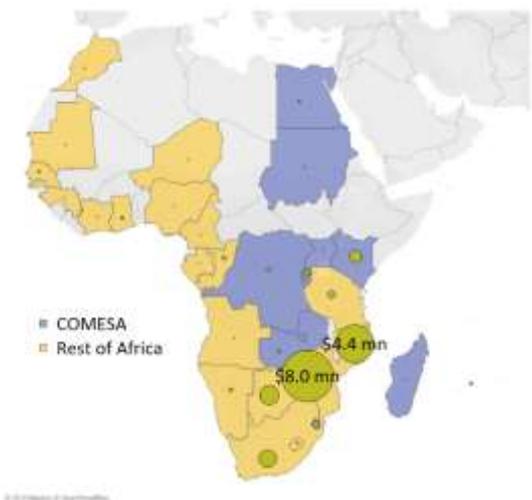
Malawi has the potential to increase its exports of oil seeds in Africa by \$16.7 million - \$16.6 million under current tariff conditions and another \$21,000 if intra-African tariffs are fully removed.

COMESA markets hold \$4.8 million (29%) of this potential, mainly:

- Zimbabwe: \$4.2 million

Other African markets hold \$11.9 million (71%) of this potential, mainly:

- United Republic of Tanzania: \$5.7 million
- Mozambique: \$4.3 million



**VEGETAL RESIDUES**

Malawi has the potential to increase its exports of vegetal residues in Africa by \$15.5 million - \$15.4 million under current tariff conditions and another \$100,000 if intra-African tariffs are fully removed.

COMESA markets hold \$8.8 million (56%) of this potential, mainly:

- Zimbabwe: \$8.0 million

Other African markets hold \$6.8 million (44%) of this potential, mainly:

- Mozambique: \$4.4 million
- Botswana: \$1.1 million

Note: Coloured countries are African countries in which the exporter has unrealized potential in this product. Bubbles and labels show total export growth potential under AfCFTA, per market.

## Mauritius

Mauritius has an export potential to the world of \$2.7 billion. COMESA is the destination for about 12% of Mauritius' export potential, while the rest of Africa accounts for 15%.

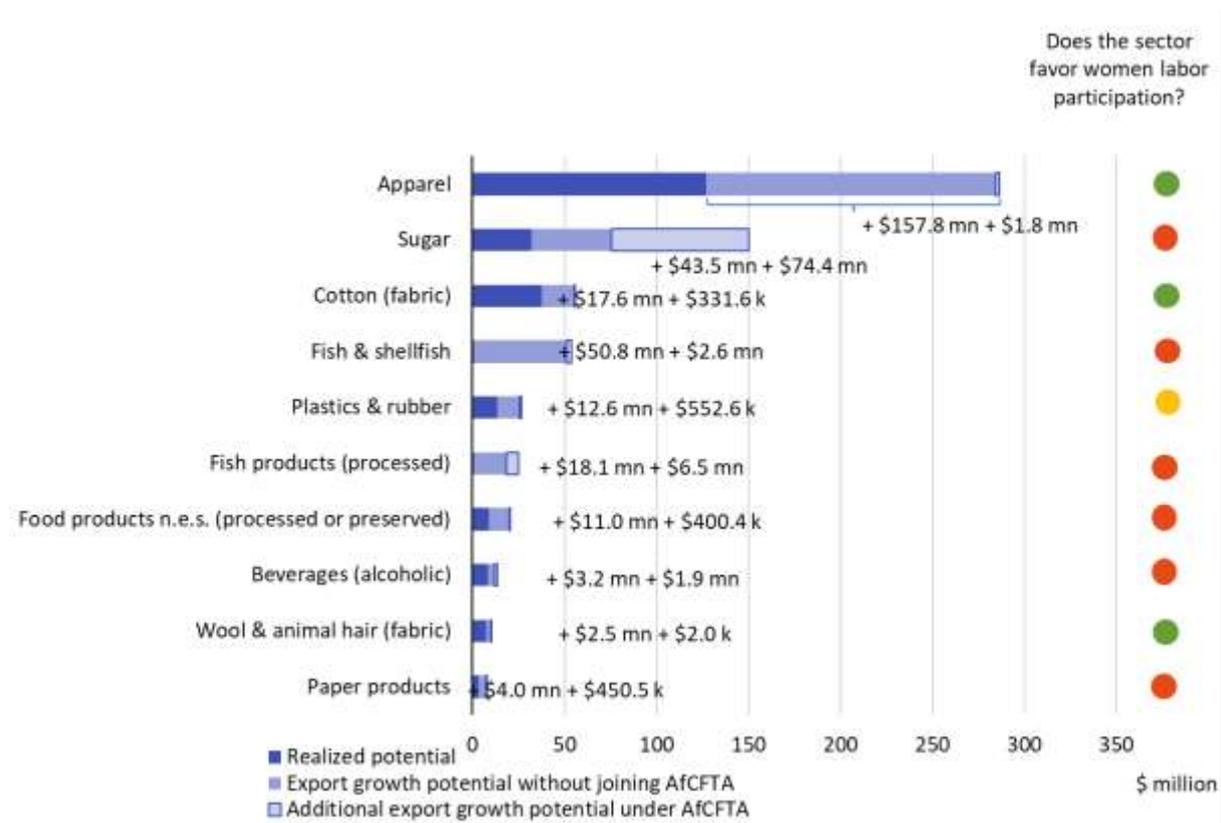
Joining the AfCFTA would increase Mauritius' export potential to COMESA by 1.5% and export potential to the rest of Africa by 24% (under the assumption that all other African countries have joined as well).

Apparel is the most important subsector with export potential to Africa. It represents \$286.3 million, or 40% of Mauritius' total export potential to the region, out of which \$157.8 million are still untapped. Export growth potential in apparel could increase by another \$1.8 million through joining the AfCFTA. The apparel subsector features a high share of female labour in Mauritius.

The second most important subsector with export potential is sugar, with \$150 million. 43.5 million of this export potential is currently untapped. With an export growth potential increase of \$74.4 million, Mauritius' sugar sector could reap large benefits if the country joins the AfCFTA.

The cotton (fabric) subsector has an export potential of \$55.5 million, out of which \$17.6 million are currently untapped. With \$331,600, additional benefits from the AfCFTA are limited in this subsector. As apparel, the cotton subsector exhibits a high share of female labour participation.

Figure 29 Mauritius: Total realized and unrealized export potential to Africa, by product



Note: Green dots show products belonging to sectors in which the share of women employees is above the national average or above 50% but smaller than the national average. Yellow dots symbolize sectors in which the share of women is close to average (less than 10% below average). Red dots stand for sectors in which the share of women is more than 10% below the national average. Labels indicate total export growth potential per product.

Figure 30 Mauritius: Export growth potential for selected products, to African countries



**APPAREL**

Mauritius has the potential to increase its exports of apparel in Africa by \$159.6 million - \$157.8 million under current tariff conditions and another \$1.8 million if intra-African tariffs are fully removed.

COMESA markets hold \$15.8 million (10%) of this potential, mainly:

- Zambia: \$6.4 million

Other African markets hold \$143.8 million (90%) of this potential, mainly:

- South Africa: \$129.5 million
- Botswana: \$6.0 million



**SUGAR**

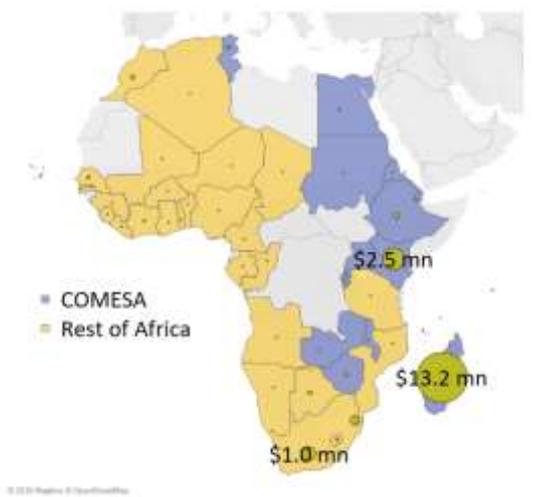
Mauritius has the potential to increase its exports of sugar in Africa by \$117.9 million - \$43.5 million under current tariff conditions and another \$74.4 million if intra-African tariffs are fully removed.

COMESA markets hold \$17.1 million (14%) of this potential, mainly:

- Madagascar: \$12.0 million

Other African markets hold \$100.8 million (86%) of this potential, mainly:

- South Africa: \$85.5 million
- Morocco: \$2.9 million



**COTTON (FABRIC)**

Mauritius has the potential to increase its exports of cotton in Africa by \$17.9 million - \$17.6 million under current tariff conditions and another \$332,000 if intra-African tariffs are fully removed.

COMESA markets hold \$16.6 million (92%) of this potential, mainly:

- Madagascar: \$13.2 million
- Kenya: \$2.5 million

Other African markets hold \$1.4 million (8%) of this potential, mainly:

- South Africa: \$1.0 million

Note: Coloured countries are African countries in which the exporter has unrealized potential in this product. Bubbles and labels show total export growth potential under AfCFTA, per market.

## Rwanda

Rwanda has an export potential to the world of \$367.5 million. COMESA is the destination for about 30% of Rwanda’s export potential, while the rest of Africa accounts for 2.5%.

Joining the AfCFTA would increase Rwanda’s export potential to COMESA by 55% and export potential to the rest of Africa by 44% (under the assumption that all other African countries have joined as well).

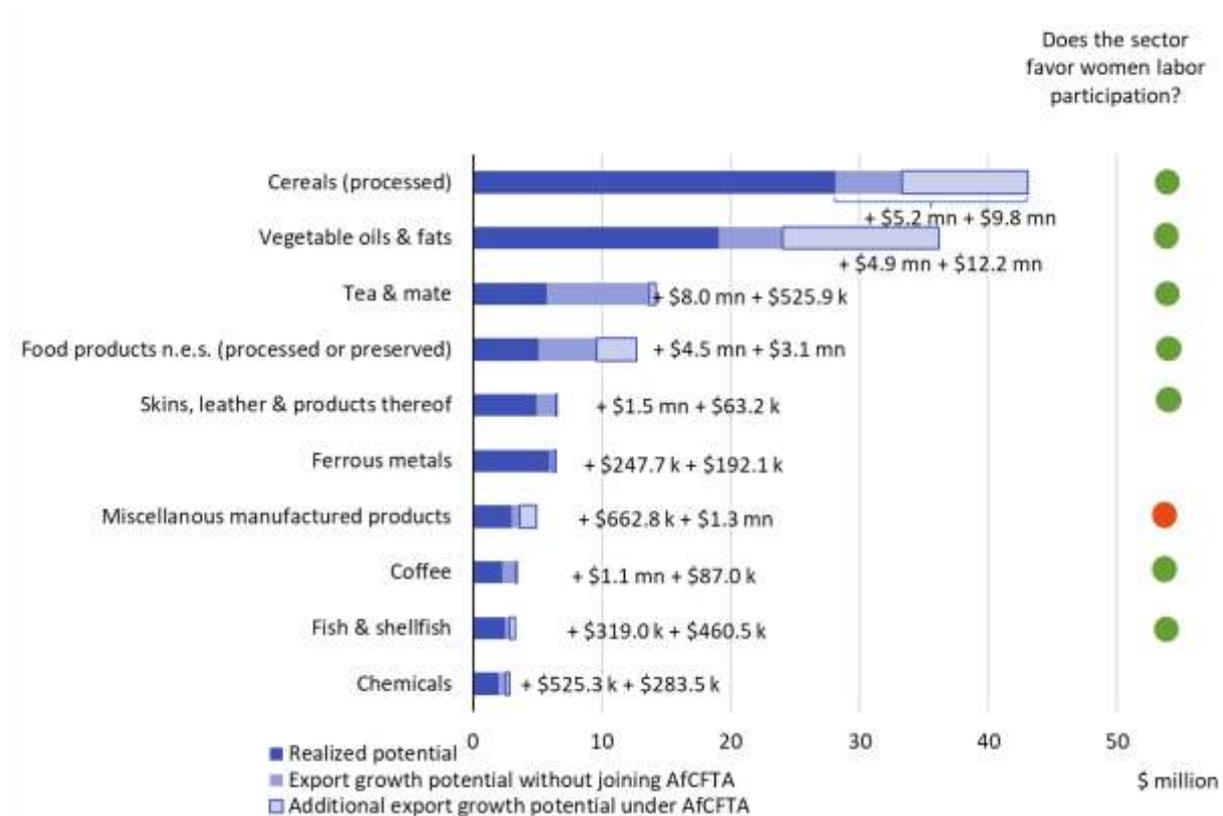
Processed cereals is the most important subsector with export potential to Africa. It represents \$43.1 million, or 30% of Rwanda’s total export potential to the region, out of which \$5.2 million are still untapped. Export growth potential could increase by another \$9.8 million through joining the AfCFTA. The main product with export growth potential in this subsector is wheat flour (\$14.6 million).

The second most important subsector with export potential is vegetable oils and fats, with \$36.2 million. 4.9 million of this export potential is currently untapped. With an export growth potential increase of \$12.2 million, Rwanda’s vegetable oils sector could reap large benefits if Rwanda joins the AfCFTA. Untapped export potential in the subsector exists almost exclusively in one product: palm oil (\$17 million).

The tea subsector has an export potential of \$14.2 million, out of which \$8.0 million are currently untapped. With \$525,900, additional benefits from the AfCFTA are limited in this subsector.

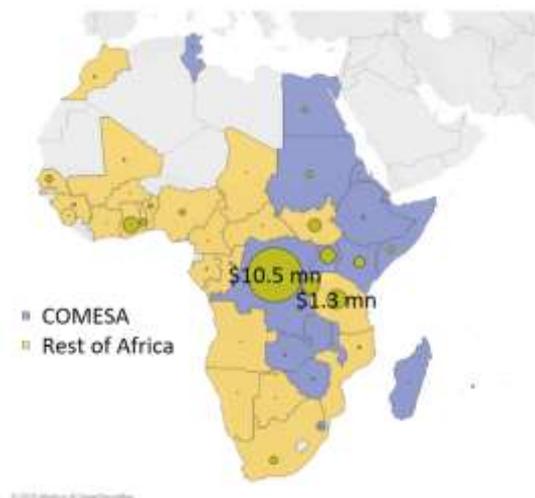
The manufacture of food products and beverages industry, which includes processed cereals, vegetable oils and fats and tea, features a high share of female labour in Rwanda.

Figure 31 Rwanda: Total realized and unrealized export potential to Africa, by product



Note: Green dots show products belonging to sectors in which the share of women employees is above the national average or above 50% but smaller than the national average. Yellow dots symbolize sectors in which the share of women is close to average (less than 10% below average). Red dots stand for sectors in which the share of women is more than 10% below the national average. Labels indicate total export growth potential per product.

Figure 32 Rwanda: Export growth potential for selected products, to African countries



**VEGETABLE OILS**

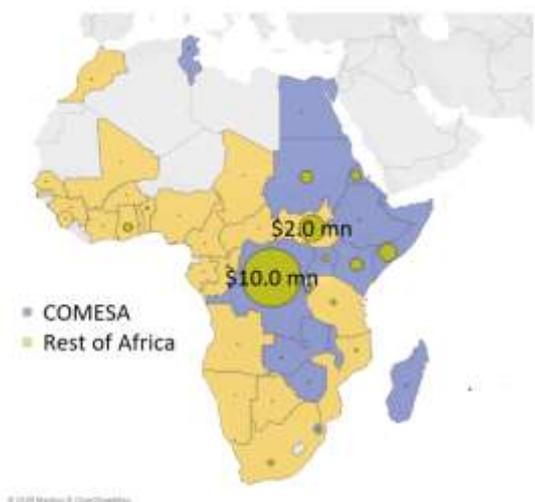
Rwanda has the potential to increase its exports of vegetable oils in Africa by \$17.1 million - \$4.9 million under current tariff conditions and another \$12.2 million if intra-African tariffs are fully removed.

COMESA markets hold \$13.3 million (78%) of this potential, mainly:

- Democratic Republic of the Congo: \$10.5 million
- Burundi: \$1.0 million

Other African markets hold \$3.8 million (22%) of this potential, mainly:

- United Republic of Tanzania: \$1.3 million



**PROCESSED CEREALS**

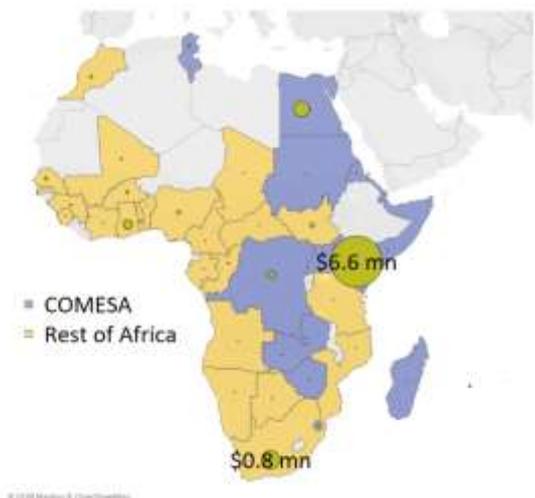
Rwanda has the potential to increase its exports of processed cereals in Africa by \$14.9 million - \$5.2 million under current tariff conditions are addressed and another \$9.8 million if intra-African tariffs are fully removed.

COMESA markets hold \$12.3 million (83%) of this potential, mainly:

- Democratic Republic of the Congo: \$10.0 million
- Somalia: \$892,000 million

Other African markets hold \$2.6 million (17%) of this potential, mainly:

- South Sudan: \$2.0 million



**TEA**

Rwanda has the potential to increase its exports of tea in Africa by \$8.5 million - \$8.0 million under current tariff conditions and another \$526,000 if intra-African tariffs are fully removed.

COMESA markets hold \$7.3 million (86%) of this potential , mainly:

- Kenya: \$6.6 million
- Egypt: \$573,000

Other African markets hold \$1.2 million (14%) of this potential, mainly:

- South Africa: 834,000 million

Note: Coloured countries are African countries in which the exporter has unrealized potential in this product. Bubbles and labels show total export growth potential under AfCFTA, per market.

## Seychelles

Seychelles has an export potential to the world of \$503 million. COMESA is the destination for about 8% of Seychelles' export potential, while the rest of Africa plays a limited role with about 1.2%.

Joining the AfCFTA would increase Seychelles' export potential to COMESA by about 25% and export potential to the rest of Africa by 844% (under the assumption that all other African countries have joined as well).

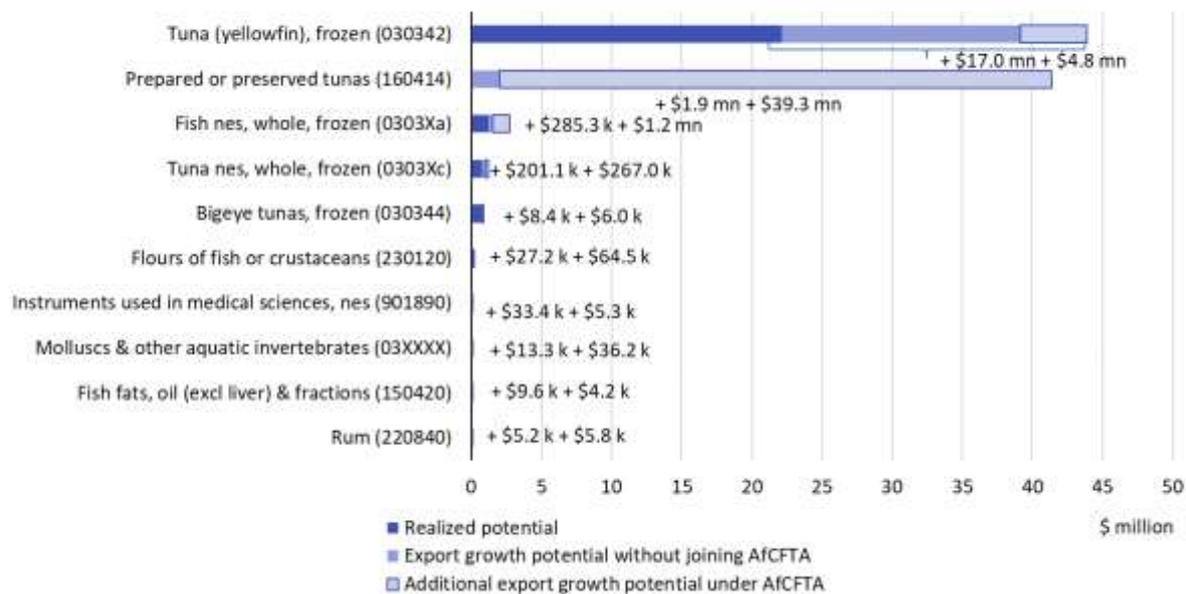
Frozen yellowfin tuna is the most important product with export potential to Africa. It represents \$43.9 million, or 49% of the country's total export potential to the region, out of which \$17 million is still untapped. Joining the AfCFTA would increase export growth potential by \$4.8 million.<sup>11</sup>

The second most important product, prepared tuna, is on par with frozen tuna in terms of total export potential. With \$41.3 million, it accounts for 46% of Seychelles' export potential to Africa. Current exports in this product are very small, and \$1.9 million of export potential remains untapped. The product would reap large benefits from joining the AfCFTA, with an increase in export growth potential of \$39.3 million.

Whole frozen fish, the third product, has a significantly smaller export potential to Africa than the first two, with \$2.7 million. \$285,300 are currently unrealized, and joining the AfCFTA could add \$1.2 million in export growth potential.

Information on female labour force participation is not available for Seychelles.

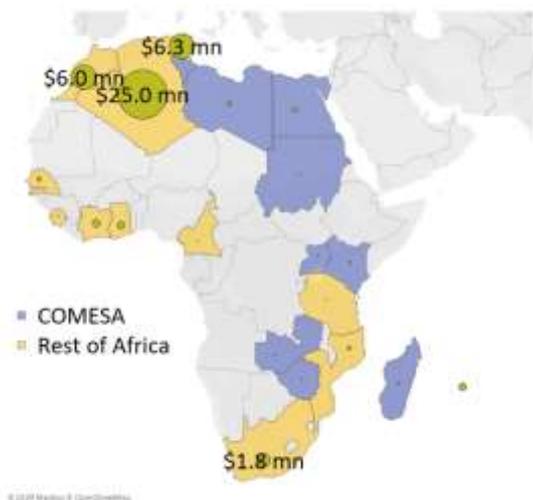
Figure 33 Seychelles: Total realized and unrealized export potential to Africa, by product



Note: Green dots show products belonging to sectors in which the share of women employees is above the national average or above 50% but smaller than the national average. Yellow dots symbolize sectors in which the share of women is close to average (less than 10% below average). Red dots stand for sectors in which the share of women is more than 10% below the national average. Labels indicate total export growth potential per product.

<sup>11</sup> Under the assumption that all other African countries have joined, too.

Figure 34 Seychelles: Export growth potential for selected products, to African countries



**PREPARED TUNA**

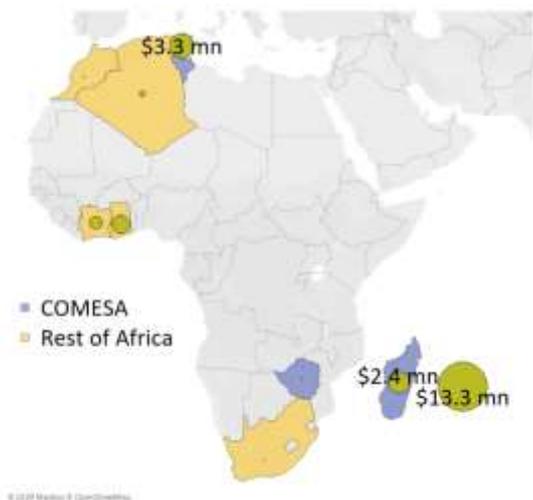
Seychelles has the potential to increase its exports of prepared tuna to Africa by \$41.2 million – \$1.9 million under current tariff conditions and another \$39.3 if intra-African tariffs are fully removed.

COMESA markets hold \$7.2 million (17%) of this potential, mainly:

- Tunisia: \$6.3 million

Other African markets hold \$34.1 million (83%) of this potential, mainly:

- Algeria: \$25.0 million
- Morocco: \$6.0 million



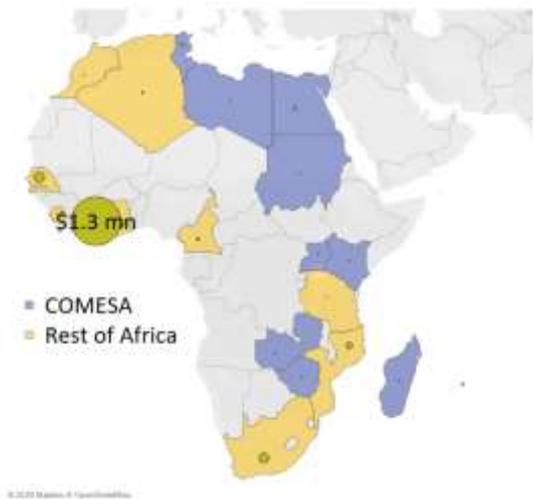
**FROZEN TUNA**

Seychelles has the potential to increase its exports of frozen tuna to Africa by \$21.7 million – \$17.0 million under current tariff conditions and another \$4.8 if intra-African tariffs are fully removed.

COMESA markets hold \$19.0 million (88%) of this potential, mainly:

- Mauritius: \$13.3 million
- Tunisia: \$3.3 million
- Madagascar: \$2.4 million

Other African markets hold \$2.7 million (12%) of this potential.



**WHOLE FROZEN FISH**

Seychelles has the potential to increase its exports of whole frozen fish to Africa by \$1.5 million – \$285,000 under current tariff conditions and another \$1.2 million if intra-African tariffs are fully removed.

Virtually all of this export growth potential lies in African markets outside of COMESA, mainly:

- Côte d'Ivoire: \$1.3 million
- Senegal: \$56,000
- South Africa: \$51,000

Note: Coloured countries are African countries in which the exporter has unrealized potential in this product. Bubbles and labels show total export growth potential under AfCFTA, per market.

## Somalia

Somalia has an export potential to the world of \$323 million. COMESA is the destination for only 0.4% of Somalia's export potential, while the rest of Africa represents 3.1%.

Joining the AfCFTA would increase Somalia's export potential to COMESA by about 74% and export potential to the rest of Africa by 632% (under the assumption that all other African countries have joined as well).

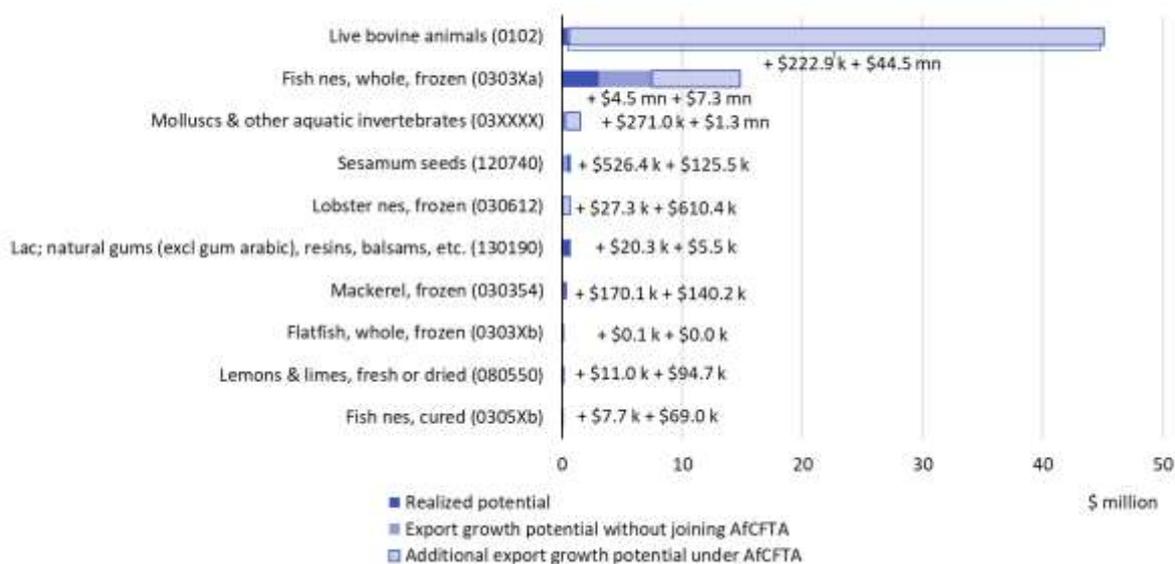
Live bovine animals is the most important product with export potential to Africa, despite the fact that current exports are still very low. The product represents \$45.1 million, or 70% of the country's total export potential to the region. \$223,000 of this export potential is currently untapped. Most of the potential is expected as a result of joining the AfCFTA, which would give rise to additional export growth opportunities of about \$44.5 million.<sup>12</sup>

The second most important product, whole frozen fish, has an export potential of \$14.8 million. \$4.5 million is currently untapped, and joining the AfCFTA could create export growth opportunities of an additional \$7.3 million.

Molluscs and other aquatic invertebrates, the third product, has a significantly smaller export potential to Africa than the first two, with \$1.5 million. \$271,000 are currently unrealized, and joining the AfCFTA could add \$1.3 million in export growth potential.

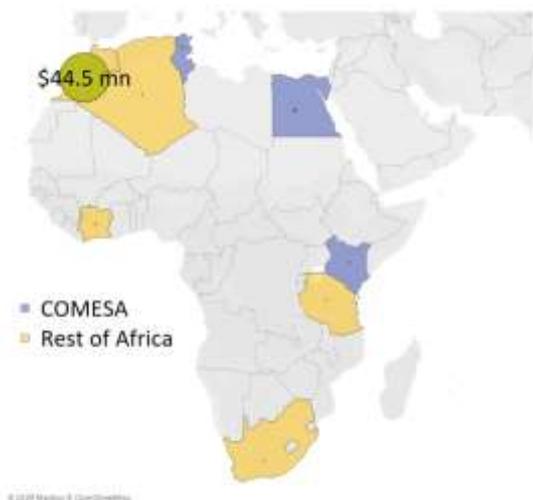
Information on female labour force participation is not available for Somalia.

Figure 35 Somalia: Total realized and unrealized export potential to Africa, by product



<sup>12</sup> Under the assumption that all other African countries have joined, too.

Figure 36 Somalia: Export growth potential for selected products, to African countries

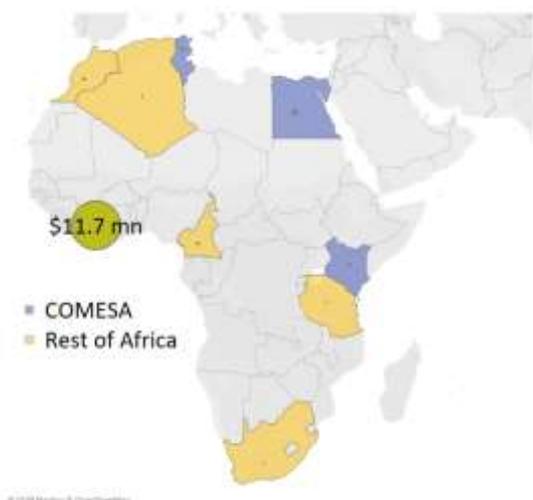


**LIVE BOVINE ANIMALS**

Somalia has the potential to increase its exports of live bovine animals to Africa by \$44.7 million – \$223,000 million under current tariff conditions and another 44.5 if intra-African tariffs are fully removed.

Virtually all of this export growth potential lies in African markets outside of COMESA, mainly:

- Morocco: \$44.5 million

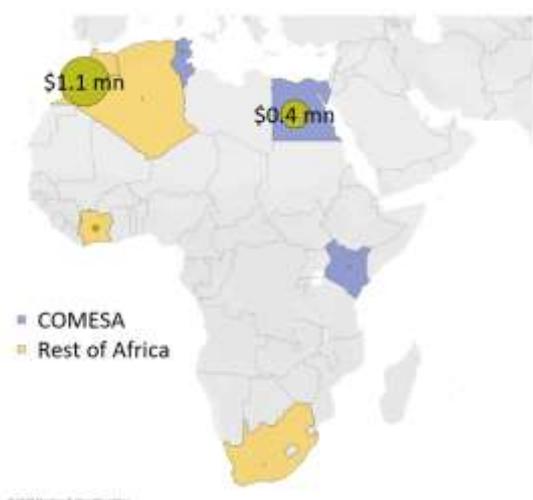


**WHOLE FROZEN FISH**

Somalia has the potential to increase its exports of whole frozen fish to Africa by \$11.8 million – \$4.5 million under current tariff conditions and another \$7.3 if intra-African tariffs are fully removed.

Virtually all of this export growth potential lies in African markets outside of COMESA, mainly:

- Côte d'Ivoire: \$11.7 million



**MOLLUSCS**

Somalia has the potential to increase its exports of molluscs to Africa by \$1.5 million – \$271,000 under current tariff conditions and another \$1.3 million if intra-African tariffs are fully removed.

COMESA markets hold \$376,000 (24%) of this potential, mainly:

- Egypt: \$0.4 million

Other African markets hold \$1.2 million (76%) of this potential, mainly:

- Morocco: \$1.1 million

Note: Coloured countries are African countries in which the exporter has unrealized potential in this product. Bubbles and labels show total export growth potential under AfCFTA, per market.

## Sudan

Sudan has an export potential to the world of \$2 billion. COMESA is the destination for about 14% of Sudan's export potential, while the rest of Africa plays a minor role, accounting for less than 1%.

Joining the AfCFTA would increase Sudan's export potential to COMESA by 0.8% and export potential to the rest of Africa by 58% (under the assumption that all other African countries have joined as well).

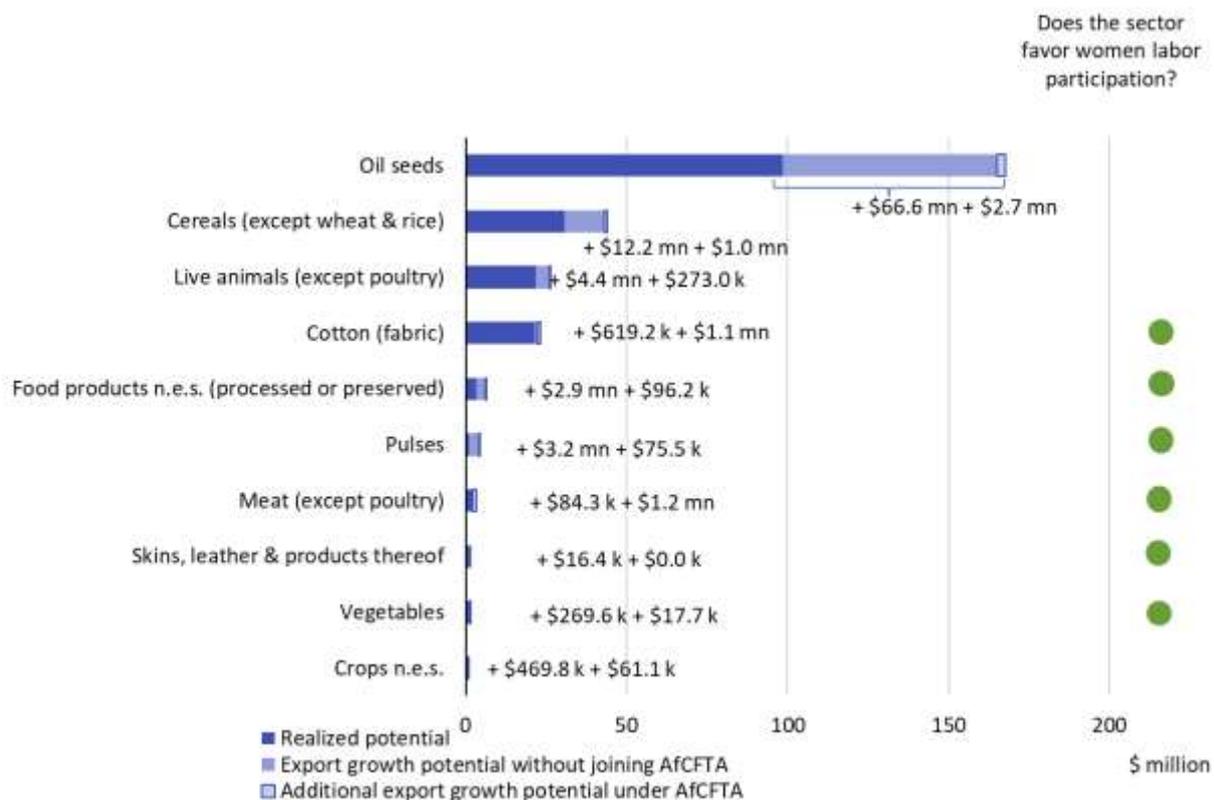
Oil seeds is the most important subsector with export potential to Africa. It represents \$167.7 million, or 60% of Sudan's total export potential to the region, out of which \$66.6 million are still untapped. Export growth potential in the oil seeds sector could increase by another \$2.7 million through joining the AfCFTA. The most important products with export growth potential in this subsector are sesamum (\$58.1 million) and groundnuts (\$6.8 million).

The second most important subsector with export potential is cereals other than wheat and rice, with \$44.0 million. 12.2 million of this export potential is currently untapped. Joining the AfCFTA could add another \$1.0 million in export growth potential. Untapped export potential in the subsector exists almost exclusively in one product: sorghum (\$13.0 million).

The subsector live animals other than poultry has an export potential of \$26.3 million, out of which \$4.4 million are currently untapped. With \$273,000, additional benefits from the AfCFTA are limited in this subsector. The most important live animals with untapped export potential are bovine animals (\$2.1 million), followed by sheep (\$926,000) and goats (\$865,000).

Information on female labour force participation in these sectors is not available for Sudan.

Figure 37 Sudan: Total realized and unrealized export potential to Africa, by product



Note: Green dots show products belonging to sectors in which the share of women employees is above the national average or above 50% but smaller than the national average. Yellow dots symbolize sectors in which the share of women is close to average (less than 10% below average). Red dots stand for sectors in which the share of women is more than 10% below the national average. Labels indicate total export growth potential per product.

Figure 38 Sudan: Export growth potential for selected products, to African countries



**OIL SEEDS**

Sudan has the potential to increase its exports of oil seeds in Africa by \$69.3 million - \$66.6 million under current tariff conditions and another \$2.7 million if intra-African tariffs are fully removed.

COMESA markets hold \$66.1 million (95%) of this potential, mainly:

- Egypt: \$60.2 million
- Kenya: \$5.0 million

Other African markets hold \$3.2 million (5%) of this potential, mainly:

- Algeria: \$3.0 million



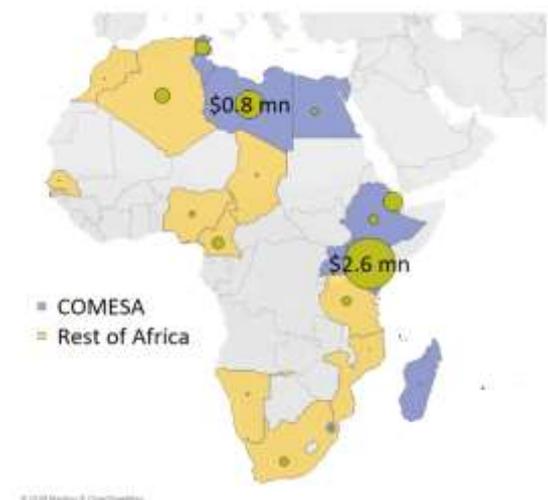
**CEREALS**

Sudan has the potential to increase its exports of cereals in Africa by \$13.2 million - \$12.2 million under current tariff conditions and another \$1.0 million if intra-African tariffs are fully removed.

COMESA markets hold \$12.2 million (93%) of this potential, mainly:

- Kenya: \$4.8 million
- Djibouti: \$4.4 million
- Ethiopia: \$1.9 million

Other African markets hold \$987,000 (7%) of this potential.



**LIVE ANIMALS**

Sudan has the potential to increase its exports of live animals in Africa by \$4.6 million - \$4.4 million under current tariff conditions and another \$273,000 if intra-African tariffs are fully removed.

COMESA markets hold \$4.1 million (89%) of this potential , mainly:

- Kenya: \$2.6 million
- Libya: \$790,000 million
- Djibouti: \$369,000 million

Other African markets hold \$533,000 (11%) of this potential.

Note: Coloured countries are African countries in which the exporter has unrealized potential in this product. Bubbles and labels show total export growth potential under AfCFTA, per market.

## Tunisia

Tunisia has an export potential to the world of \$16.2 billion. African countries do not account for a large share of this export potential: COMESA countries represent about 4% while the rest of Africa accounts for 7%.

Joining the AfCFTA would increase Tunisia’s export potential to COMESA by 32% while export potential to the rest of Africa would rise by a staggering 82% (under the assumption that all other African countries have joined as well).

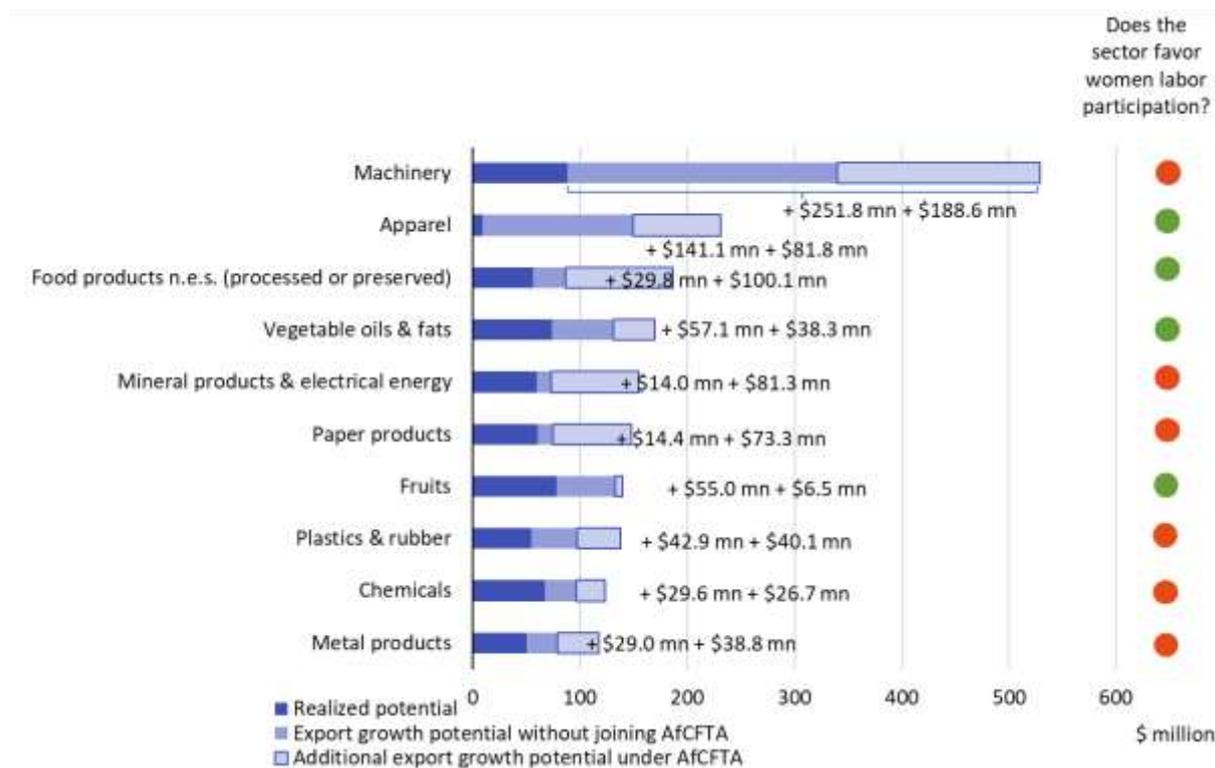
Machinery is the most important subsector with export potential to Africa. It represents \$528.7 million, or 19% of the country’s total export potential to the region. A very large share of this export potential is untapped, leaving room to increase exports by \$251.8 million under current tariff conditions. Joining the agreement would increase Tunisia’s export growth potential by \$188.6 million.<sup>13</sup> The share of women working in this subsector is relatively low.

The second most important subsector with export potential is apparel (\$231.7 million). Nearly all of this potential is unrealized: \$141.1 million under current tariff conditions, plus another \$81.8 million if the country joins the AfCFTA.

Processed or preserved food products follow with an export potential of \$186.5 million. The potential for export growth is \$29.8 million. It could increase by \$100.1 million if Tunisia joined the AfCFTA.

Both apparel and food products have relatively high shares of women labour participation.

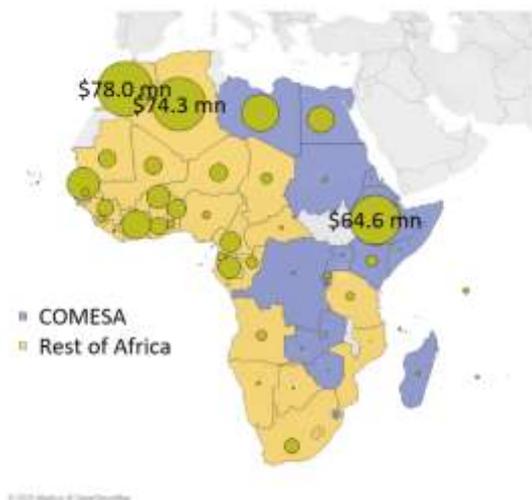
Figure 39 Tunisia: Total realized and unrealized export potential to Africa, by subsector



Note: Green dots show products belonging to subsectors in which the share of women employees is above the national average or above 50% but smaller than the national average. Yellow dots symbolize subsectors in which the share of women is close to average (less than 10% below average). Red dots stand for subsectors in which the share of women is more than 10% below the national average. Labels indicate export growth potential per subsector, without AfCFTA and under AfCFTA.

<sup>13</sup> Under the assumption that all other African countries have joined, too.

Figure 40 Tunisia: Export growth potential for selected products, to African countries



### MACHINERY

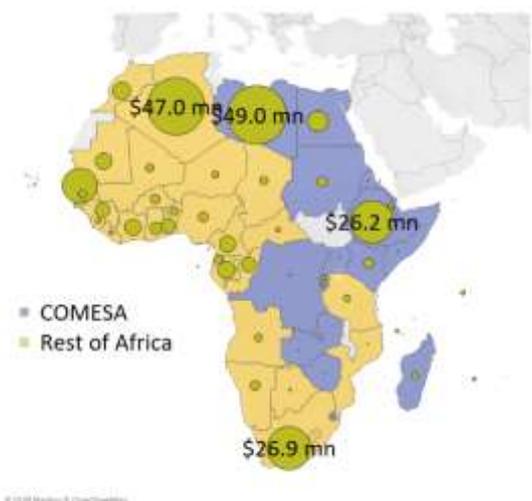
Tunisia has the potential to increase its exports of machinery products to Africa by \$440.4 million – \$251.8 million under current tariff conditions and another \$188.6 million if intra-African tariffs are fully removed.

COMESA markets hold \$126.8 million (29%) of this potential, mainly:

- Ethiopia: \$64.6 million

Other African markets hold \$313.6 million (71%) of this potential, mainly:

- Morocco: \$78 million
- Algeria: \$74.3 million



### APPAREL

Tunisia has the potential to increase its exports of apparel products to Africa by \$222.8 million – \$141.1 million under current tariff conditions and another \$81.8 million if intra-African tariffs are fully removed.

COMESA markets hold \$86.9 million (39%) of this potential, mainly:

- Libya: \$49 million

Other African markets hold \$135.9 million (61%) of this potential, mainly:

- Algeria: \$47 million
- South Africa: \$26.9 million



### FOOD PRODUCTS

Tunisia has the potential to increase its exports of processed or preserved food products to Africa by \$129.8 million – \$29.8 million under current tariff conditions and another \$100.1 million if intra-African tariffs are fully removed.

COMESA markets hold \$11.3 million (9%) of this potential, mainly:

- Libya: \$3.6 million

Other African markets hold \$118.5 million (91%) of this potential, mainly:

- Senegal: \$17 million
- Algeria: \$13.5 million

Note: Coloured countries are African countries in which the exporter has unrealized potential in this product. Bubbles and labels show total export growth potential under AfCFTA, per market.

## Uganda

Uganda has an export potential to the world of \$2.4 billion. COMESA is the destination for about 26% of Uganda’s export potential, while the rest of Africa accounts for 6%.

Joining the AfCFTA would increase Uganda’s export potential to COMESA by 23% while export potential to the rest of Africa would rise by a staggering 84% (under the assumption that all other African countries have joined as well).

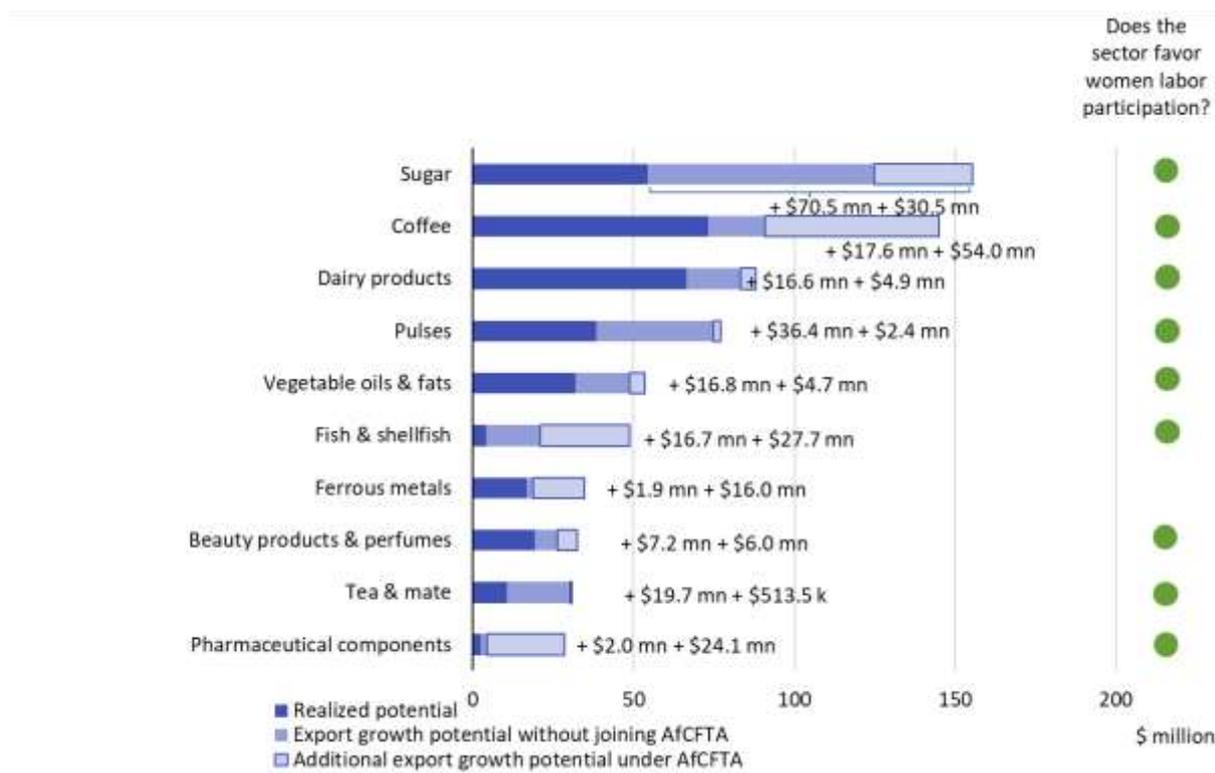
Sugar is the most important subsector with export potential to Africa. It represents \$155.4 million, or 17% of the country’s total export potential to the region. A large share of this export potential is untapped, leaving room to increase exports by \$70.5 million under current tariff conditions. Joining the agreement would increase export growth potential by \$30.5 million.<sup>14</sup>

The second most important subsector with export potential is coffee (\$144.8 million). There is plenty of room for export growth, especially if the country joins the AfCFTA: \$17.6 million under current tariff conditions, plus another \$54 million if the country joins the agreement.

Dairy products follow with an export potential of \$88.1 million. The potential for export growth is \$16.6 million under current tariff conditions. It could increase by \$4.9 million if Uganda joins the AfCFTA.

All top subsectors have a relatively high women participation share.

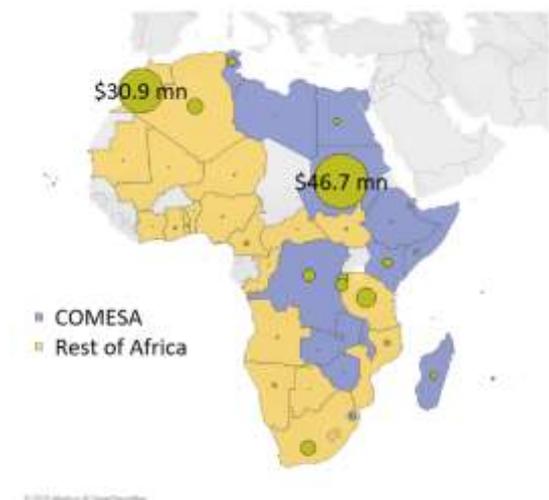
Figure 41 Uganda: Total realized and unrealized export potential to Africa, by subsector



Note: Green dots show products belonging to subsectors in which the share of women employees is above the national average or above 50% but smaller than the national average. Yellow dots symbolize subsectors in which the share of women is close to average (less than 10% below average). Red dots stand for subsectors in which the share of women is more than 10% below the national average. Labels indicate export growth potential per subsector, without AfCFTA and under AfCFTA.

<sup>14</sup> Under the assumption that all other African countries have joined, too.

Figure 42 Uganda: Export growth potential for selected products, to African countries



**SUGAR**

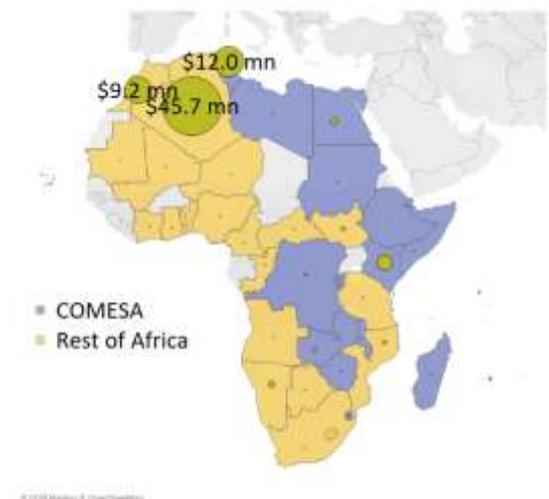
Uganda has the potential to increase its exports of sugar to Africa by \$101.1 million – \$70.5 under current tariff conditions and another \$30.5 million if intra-African tariffs are fully removed.

COMESA markets hold \$56.3 million (56%) of this potential, mainly:

- Sudan: \$46.7 million

Other African markets hold \$44.8 million (44%) of this potential, mainly:

- Morocco: \$30.9 million
- United Republic of Tanzania: \$5.7 million



**COFFEE**

Uganda has the potential to increase its exports of coffee to Africa by \$71.6 million – \$17.6 million under current tariff conditions and another \$54 million if intra-African tariffs are fully removed.

COMESA markets hold \$15.9 million (22%) of this potential, mainly:

- Tunisia: \$12 million

Other African markets hold \$55.7 million (78%) of this potential, mainly:

- Algeria: \$45.7 million
- Morocco: \$9.2 million



**FISH & SHELLFISH**

Uganda has the potential to increase its exports of fish and shellfish to Africa by \$44.5 million – \$16.7 million under current tariff conditions and another \$27.7 million if intra-African tariffs are fully removed.

COMESA markets hold \$34.9 million (79%) of this potential, mainly:

- Democratic Republic of the Congo: \$22.5 million
- Tunisia: \$7.1 million

Other African markets hold \$9.5 million (21%) of this potential, mainly:

- South Africa: \$3 million

Note: Coloured countries are African countries in which the exporter has unrealized potential in this product. Bubbles and labels show total export growth potential under AfCFTA, per market.

## Zambia

Zambia has an export potential to the world of \$9.7 billion. COMESA is the destination for about 6% of Zambia's export potential, while the rest of Africa accounts for 8% of it.

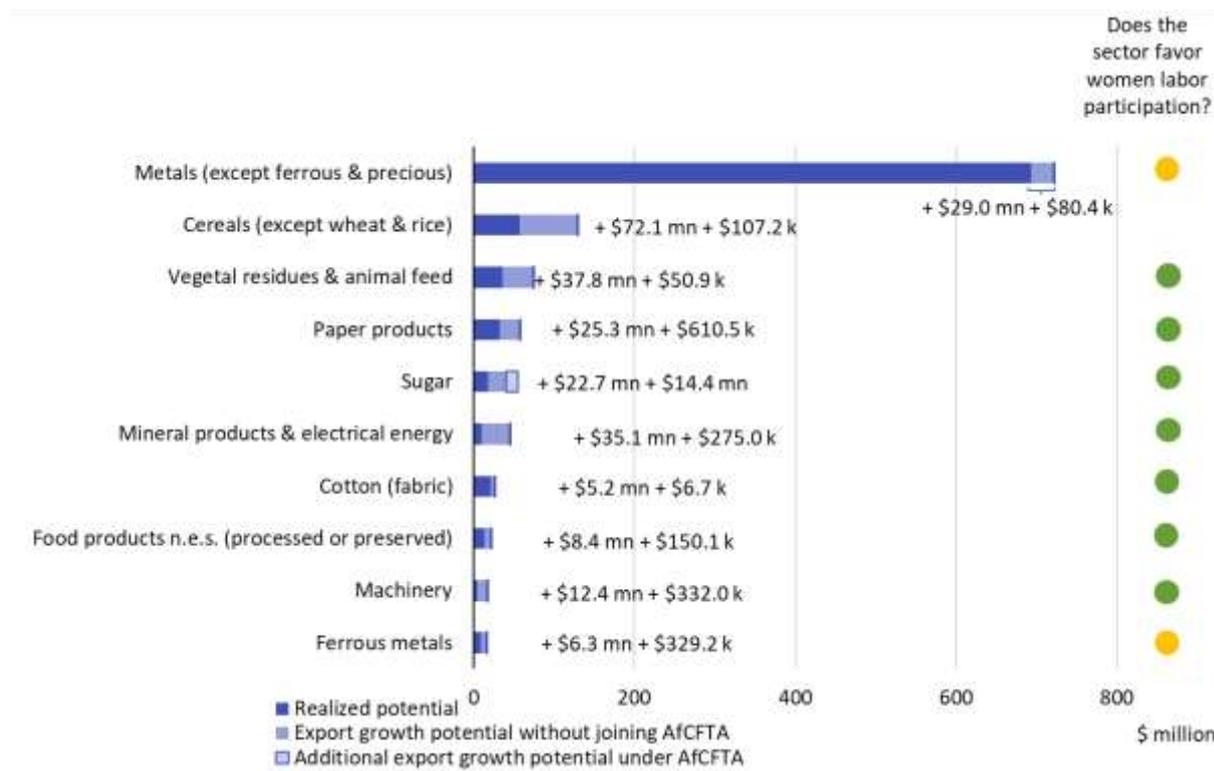
Joining the AfCFTA would increase Zambia's export potential to COMESA by only 0.1% while export potential to the rest of Africa would rise by 3% (under the assumption that all other African countries have joined as well).

Metals (except ferrous and precious) is the most important subsector with export potential to Africa. It represents \$721.7 million, or 58% of the country's total export potential to the region. Only a small share of this export potential is untapped, leaving room to increase exports by \$29 million under current tariffs conditions. Joining the AfCFTA could increase export growth potential by \$80,000.<sup>15</sup> The share of women working in this subsector is close to the average of the country.

The second most important subsector with export potential is cereals (except wheat & rice) (\$129 million). There is plenty of room for export growth: \$72.1 million, plus another \$107,000 if the country joins the AfCFTA.

Vegetal residues & animal feed follow with an export potential of \$73.7 million. The potential for export growth is \$37.8 million. It could increase by \$50,900 if Zambia joins the AfCFTA. The subsector features a relatively high share of female labour in Zambia.

Figure 43 Zambia: Total realized and unrealized export potential to Africa, by subsector



Note: Green dots show products belonging to subsectors in which the share of women employees is above the national average or above 50% but smaller than the national average. Yellow dots symbolize subsectors in which the share of women is close to average (less than 10% below average). Red dots stand for subsectors in which the share of women is more than 10% below the national average. Labels indicate export growth potential per subsector, without AfCFTA and under AfCFTA.

<sup>15</sup> Under the assumption that all other African countries have joined, too.

Figure 44 Zambia: Export growth potential for selected products, to African countries



**CEREALS**

Zambia has the potential to increase its exports of cereals to Africa by \$72.2 million – \$72.1 under current tariff conditions and another \$107,000 if intra-African tariffs are fully removed.

COMESA markets hold \$61.2 million (85%) of this potential, mainly:

- Kenya: \$27.5 million
- Egypt: \$26.1 million

Other African markets hold \$11 million (15%) of this potential, mainly:

- Mozambique: \$3.6 million
- Botswana: \$4.7 million



**VEGETAL RESIDUES & ANIMAL FEED**

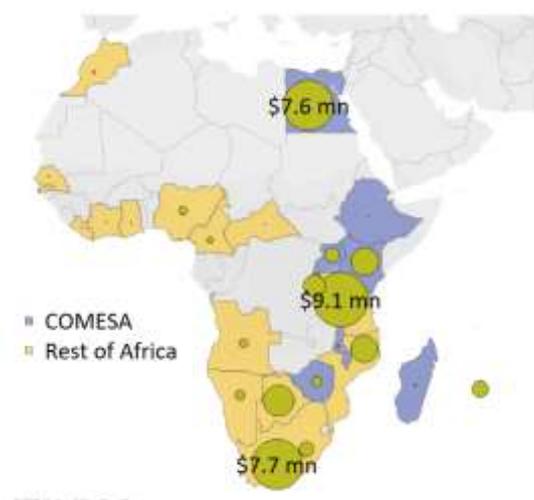
Zambia has the potential to increase its exports of vegetal residues and animal feed to Africa by \$37.9 million – \$37.8 million under current tariff conditions and another \$51,000 if intra-African tariffs are fully removed.

COMESA markets hold \$18.9 million (50%) of this potential, mainly:

- Kenya: \$9.9 million
- Zimbabwe: \$4.2 million

Other African markets hold \$19 million (50%) of this potential, mainly:

- Botswana: \$9.4 million



**SUGAR**

Zambia has the potential to increase its exports of sugar to Africa by \$37.1 million – \$22.7 million under current tariff conditions and another \$14.4 million if intra-African tariffs are fully removed.

COMESA markets hold \$13.5 million (36%) of this potential, mainly:

- Egypt: \$7.6 million

Other African markets hold \$23.6 million (64%) of this potential, mainly:

- United Republic of Tanzania: \$9.1 million
- South Africa: \$7.7 million

Note: Coloured countries are African countries in which the exporter has unrealized potential in this product. Bubbles and labels show total export growth potential under AfCFTA, per market.

## Zimbabwe

Zimbabwe has an export potential to the world of \$710 million. COMESA is the destination for about 11% of Zimbabwe’s export potential, while the rest of Africa accounts for 13% of it.

Joining the AfCFTA would increase Zimbabwe’s export potential to COMESA by only 0.3% while export potential to the rest of Africa would rise by 49% (under the assumption that all other African countries have joined as well).

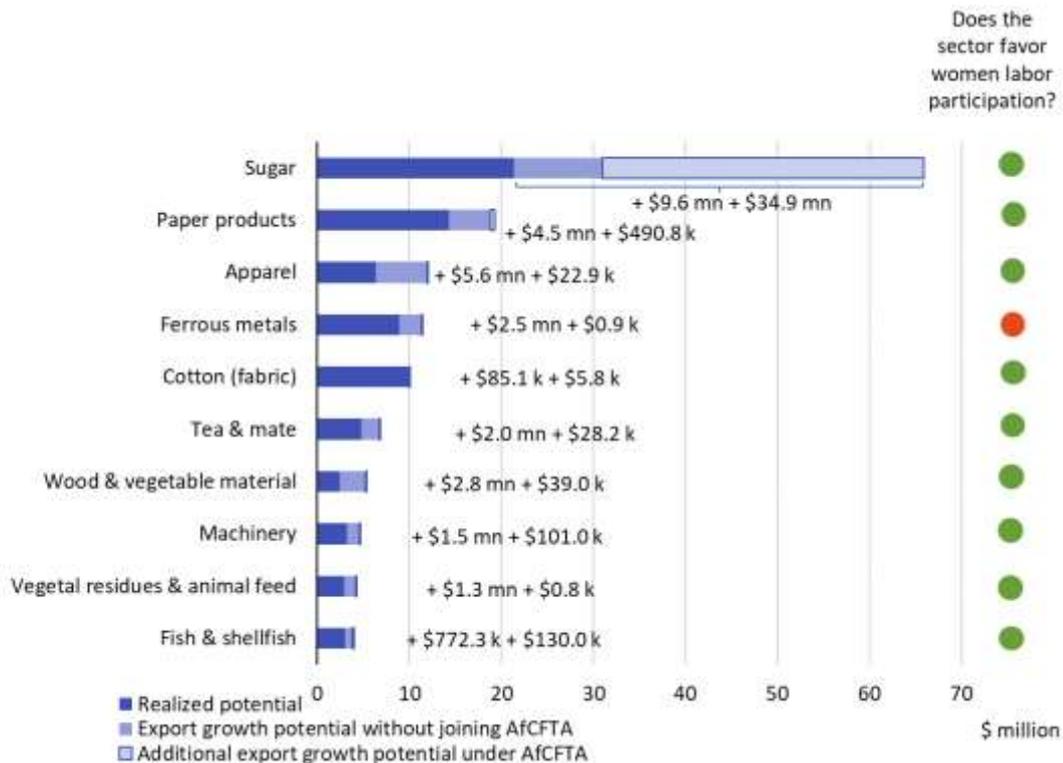
Sugar is the most important subsector with export potential to Africa. It represents \$65.9 million, or 38% of the country’s total export potential to the region. A relatively large share of this export potential is untapped, leaving room to increase exports by \$9.6 million under current tariff conditions. Joining the AfCFTA would increase export growth potential by \$34.9 million.<sup>16</sup>

The second most important subsector with export potential is paper products (\$19.3 million). There is room for export growth: \$4.5 million, plus another \$490,800 if the country joins the AfCFTA.

Apparel products follow with an export potential of \$11.9 million. The potential for export growth is \$5.6 million. It could increase by \$22,900 if Zimbabwe joins the AfCFTA.

All three top sectors feature a relatively high share of female labour in Zimbabwe.

Figure 45 Zimbabwe: Total realized and unrealized export potential to Africa, by subsector



Note: Green dots show products belonging to subsectors in which the share of women employees is above the national average or above 50% but smaller than the national average. Yellow dots symbolize subsectors in which the share of women is close to average (less than 10% below average). Red dots stand for subsectors in which the share of women is more than 10% below the national average. Labels indicate export growth potential per subsector, without AfCFTA and under AfCFTA.

<sup>16</sup> Under the assumption that all other African countries have joined, too.

Figure 46 Zimbabwe: Export growth potential for selected subsectors, to African countries



**SUGAR**

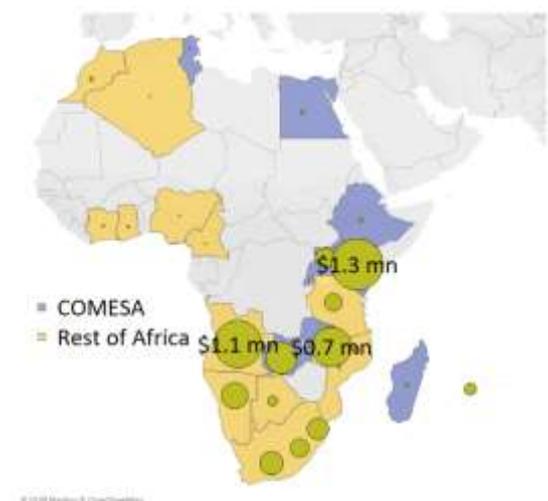
Zimbabwe has the potential to increase its exports of sugar to Africa by \$65.9 million – \$9.6 million under current tariff conditions and another \$34.9 million if intra-African tariffs are fully removed.

COMESA markets hold \$2.4 million (5%) of this potential, mainly:

- Mauritius: \$1 million

Other African markets hold \$42.2 million (95%) of this potential, mainly:

- South Africa: \$33.6 million
- Botswana: \$4.7 million



**PAPER PRODUCTS**

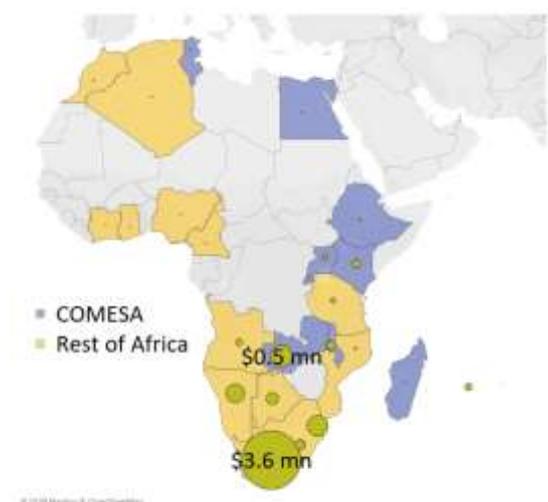
Zimbabwe has the potential to increase its exports of paper products to Africa by \$5 million – \$4 million under current tariff conditions and another \$490,800 if intra-African tariffs are fully removed.

COMESA markets hold \$3 million (59%) of this potential, mainly:

- Kenya: \$1.3 million
- Malawi: \$745,000

Other African markets hold \$2.1 million (41%) of this potential, mainly:

- Angola: \$1.1 million



**APPAREL**

Zimbabwe has the potential to increase its exports of apparel products to Africa by \$5.6 million – \$5.6 million under current tariff conditions and another \$23,000 if intra-African tariffs are fully removed.

COMESA markets hold \$1.2 million (22%) of this potential, mainly:

- Zambia: \$504,000
- Eswatini: \$457,000

Other African markets hold \$4.4 million (78%) of this potential, mainly:

- South Africa: \$3.6 million

Note: Coloured countries are African countries in which the exporter has unrealized potential in this product. Bubbles and labels show total export growth potential under AfCFTA, per market.

## APPENDICES

### Appendix I: Methodology

#### *Export Potential Indicator*

The export potential indicator (EPI) serves countries that aim to support established export sectors in increasing their exports to existing and new markets. It identifies potential export values based on supply capacities in the exporting country, demand conditions in the target market and bilateral linkages between the two. The EPI is computed for each product-destination combination, but only for products, which the country already exports.

The EPI goes beyond commonly used measures of comparative advantage by including additional variables, such as GDP and population growth prospects (until 2025), tariffs, and geographical distance. This allows accounting for expected increases in domestic supply and market demand, for a country's tariff advantage, and its distance to the target market.

The difference between a country's total export potential and its actual exports (realized export potential) reveals its unrealized export potential. It captures by how much exports could increase within the next five years. Export growth potential can result from two sources: first, future economic growth in the country itself or demand growth in the target market (dynamic, or growth-based export potential), and second, factors that trade advisors may address together with local companies, such as lacking information about the rules and regulations of the target market or difficulties to comply with them or to meet the (quality) preferences of its consumers (static, or friction-based export potential).<sup>17</sup>

#### *Value Chain Development Indicator*

The Value Chain Indicator (VCI) serves countries that aim to diversify their export basket while promoting the local transformation of nationally produced inputs and the development of (regional) value chains. It ranks diversification opportunities based on supply capacities in the exporting country, the product's input-output relationship with inputs in the exporting country's export basket, demand conditions in the target market and bilateral linkages between the exporting and importing countries.

To capture the linkages between different sectors in a production process, we rely on Input-Output (I-O) tables. Particularly, the ones from the United States, Mexico and the Philippines, which are some of the most detailed matrices available. While the analysis could be conducted using one matrix, the introduction of data from multiple countries helps account for differences in production structures. Assuming that the I-O tables of these three countries can represent future input-output relationships in countries that target export diversification, their matrices can be used to estimate each output's relationship with inputs in another country's export basket.

Supply capacities are estimated using the previously mentioned links between inputs and outputs, along with the Product Space methodology, which establishes links between products based on how frequently they coincide in countries' in export baskets. It assumes that products that are often exported together rely on similar capabilities for their production. Supply is combined with the target market's demand and market access conditions to ensure that feasible products for the exporter also have favourable chances of export success.

#### *Impact of the AfCFTA*

To estimate the potential impact of the AfCFTA on export potential, we compare export potential under current tariff conditions to export potential under the AfCFTA. For the latter, we assume a full tariff liberalization scenario in which all intra-African tariffs are set to 0%. The analysis therefore captures the

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<sup>17</sup> For more details on the Export Potential methodology, please refer to Decreux and Spies (2016). *Export Potential Assessments – a methodology to identify export opportunities for developing countries*, available at [https://umbraco.exportpotential.intracen.org/media/1089/epa-methodology\\_141216.pdf](https://umbraco.exportpotential.intracen.org/media/1089/epa-methodology_141216.pdf)

maximum gains that are possible under the AfCFTA. It should be noted that tariffs may not be set to 0% in all products, especially sensitive ones, in which case gains would be smaller.

In part 1 of the study, in which all COMESA countries and all African markets are analysed together, we compare export potential under current conditions to export potential once all African countries have joined the AfCFTA.

In part 2 of the study, in which each COMESA exporter is presented in a separate country profile, we assess the gains from the country's individual decision whether to join the AfCFTA or not. We compare a situation in which all other African countries join the AfCFTA and the specific exporter does not join to a situation in which the exporter joins along with all other African countries.

### *Female labour force participation*

Female labour force participation is estimated using country-level data of the World Bank Enterprise Surveys. An indicator is computed to capture whether female labour force participation in an industry is above or below the national average compared to other industries.<sup>18</sup> In the computation of the national average, industries are weighted according to their share in the country's exports between 2015 and 2019.

The representation of the indicator in the country profiles uses the following colour scheme: Green dots show products belonging to sectors in which the share of women employees is above the national average or above 50% but smaller than the national average. Yellow dots symbolize sectors in which the share of women is close to average (less than 10% below average). Red dots stand for sectors in which the share of women is more than 10% below the national average.

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<sup>18</sup> Note that this information is not available for all products, sectors and countries. It is not available for the following COMESA countries: the Comoros, Libya, Seychelles and Somalia.

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# #SheTrades

Women's economic empowerment is not a matter for government policy, the private sector, or social change alone. All have critical roles to play. This is why the International Trade Centre (ITC) has launched the SheTrades initiative, which seeks to connect three million women entrepreneurs to market by 2021.

