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Did External Barriers Cause the Marginalization of Sub-Saharan Africa in World Trade?

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Sub-Saharan African countries' policies contributed more to that region's 30-year decline in world trade than did OECD trade barriers, but policy options available to the OECD countries could improve the environment for African exports. Highest priority should be given to policies favoring African agricultural exports whose growth could greatly alleviate the extreme rural poverty in Africa.

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Summary findings

OECD trade barriers were not a significant factor in Sub-Saharan Africa's declining position in world trade between the mid-1950s and 1990. Far more detrimental were the African countries' own policies, including those affecting transport costs. It is essential that African countries adopt reforms aimed at achieving cost competitiveness.

Anti-competitive cargo reservation policies in many African countries help inflate international transport costs, which eat up a disproportionate share of African countries' foreign exchange earnings. Deregulation of international shipping and the promotion of competitive shipping services, together with improvements in transport infrastructure, could significantly reduce freight costs.

But policy options available to the OECD countries could also improve the external environment for, and competitive position of, African exports. Policies involving preferences should be viewed as a step toward general trade liberalization. Highest priority should be given to policies favoring agricultural exports. Among policy options the OECD countries should consider:

- Regional arrangements such as the European Union and the North American Free Trade Agreement discriminate against African and other developing countries. Policy initiatives are needed to at least place them on an equal basis with OECD members in these arrangements — especially for labor-intensive products.
- African exports are concentrated in primary commodities. When further processing is suitable, OECD preferences should be extended to all stages of the processing chain.
- Given the extreme rural poverty in Africa, measures are needed to reduce protection against African food exports. One option would be to extend (ceiling-free) generalized system of preferences for "tariffied" agricultural nontariff barriers.
- Ceilings and quotas should be eliminated from industrial-country preference schemes to be made consistent with unrestricted intra-OECD preferences extended under free trade agreements.
- OECD countries could also provide technical, finance, development, and policy analysis assistance aimed at alleviating Africa's international transport problems, especially for landlocked African countries.

This paper — a product of the International Trade Division, Policy Research Department — is part of a larger effort in the department to identify barriers to developing countries' exports and assist in their removal. Copies of the paper are available free from the World Bank, 1818 H Street NW, Washington, DC 20433. Please contact Sarah Lipscomb, room N5-056, telephone 202-473-3718, fax 202-522-1159, Internet address slipscomb@worldbank.org. March 1996. (145 pages)

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Did External Barriers Cause the Marginalization of Sub-Saharan Africa in World Trade?

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(i)

Abstract

OECD trade barriers did not play a significant role in sub-Saharan Africa's declining position in world trade over the last three decades. The detrimental effects of the African countries' own policies, such as those that influence international transport costs, were considerably more important. However, OECD countries have policy options available that could further improve the external environment for, and competitive position of, African exports. Given the dimensions of rural poverty throughout Africa, and the potential contribution increased agricultural exports could make toward its alleviation, initiatives relating to this sector should have the highest priority.

Summary

From the mid-1950s to 1990 Sub-Saharan Africa's share of global exports fell from 3.1 to 1.2 percent -- a decline implying annual export earning losses of equivalent to \$65 billion in 1990. OECD protectionism was not a significant contributing factor. Pre-Uruguay Round tariffs facing African exports to the EU, Japan and US averaged three-quarters of a percent (about 18 points lower than those the Asian NICs faced when they began their sustained export oriented industrialization drive), and preferences give Africa an edge over some competitors.

Similarly, OECD nontariff barriers do not account for Africa's poor general export performance since the share of Africa's exports subject to NTBs (11 percent) is less than half that for other developing countries. In addition, a major reduction in the importance of NTB protection facing Africa and other developing countries will occur due to the Uruguay Round. All NTBs imposed under the Multifiber Arrangement (MFA) will be phased out over ten years, most "voluntary" export restraints were eliminated, and most nontariff barriers on agricultural goods were converted to tariffs (often at very high levels) and then reduced. As a result, the NTB coverage ratio for sub-Saharan Africa's non-fuel exports will fall from 11 to about 3 percent.

While these developments are clearly positive for all developing countries as a group, some may incur losses as a result of them. The phase-out of the Multifiber Arrangement *will subject African exporters to aggressive international competition*. Their ability to maintain a viable textile and clothing export sector depends on a capacity to implement necessary reforms aimed at achieving *cost competitiveness*. Africa should also face more vigorous competition on products like footwear and ferrous metals, where exports from some other countries were formerly restrained by VERs. In other words, discriminatory OECD trade barriers against other developing countries (particularly those in East Asia) probably enhanced the pre-Uruguay external environment for African exports.

In contrast to tariffs and NTBs, international transport costs have had an important negative impact on exports and the location of manufacturing activity in Africa. African freight rates often are considerably higher than those on similar goods originating elsewhere and often conceal high rates of effective protection. African net payments for transport services are very high relative other developing countries and have increased over the last two decades. As such, a large share of foreign exchange earnings, that might have otherwise been employed in productive capacity building investments, is being utilized for payments to foreign transport services.

The anti-competitive cargo reservation policies adopted by most African governments contributes to the adverse freight rates. Recognition of the effects of these policies carries with it the prescription for corrective action -- deregulation, and more attention to improving transport infra-structure. Other regions' experience shows that deregulation, and the promotion of competition for shipping services, may reduce freight rates in the liner trades by as much as 50 percent. These points are important since they indicate more attention should focus on the negative impact of *Africa's own domestic policies* on its exports.

OECD members have several options relating to tariffs and NTBs for further improving Africa's market access conditions. Those involving preferences should be viewed as a further step toward a general trade liberalization.

- Regional arrangements, like the EU or NAFTA, provide industrial countries trade preferences to each other's markets and *discriminate against* African and other developing countries. Policy initiatives are needed to, at least, place the latter on an equal basis with OECD members in these arrangements. Some labor intensive products like textiles, clothing and footwear played a key role in the early stages of the newly industrialized countries' transformation, and have a similar potential for Africa. Where they are now excluded (as in United States) these goods should be incorporated into existing GSP schemes -- particularly so since intra-OECD preferences in regional FTAs may severely disadvantage these exports.

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- Since African exports are highly concentrated in primary commodities there is a strong interest in utilizing natural resource based industrialization strategies for their industrialization. Where further processing is suitable for developing countries OECD preferences should be extended to all stages of a processing chain. Also, an accelerated phase-in of OECD Uruguay Round tariff cuts should be adopted on products of export interest to Africa. This could assist Africa in gaining additional experience in potentially important markets (such as those for textiles and clothing) which will come under increased competitive pressure due to the MFA phase-out.

- Given the problem of extreme rural poverty in Africa, and the potential contribution increased agricultural exports could make toward its alleviation, measures are needed to reduce protection against African food exports. One option would be to extend (ceiling free) GSP preferences for "tariffied" agricultural NTBs.

- Ceilings and quotas should be eliminated from developed country preference schemes to be made consistent with unrestricted intra-OECD preferences extended under FTAs. Ceilings considerably reduce the potential worth of the GSP to African countries since, aside from their direct trade effects, they also introduce further uncertainty regarding the operation of the system (i.e., African exporters may not know whether a shipment will qualify for GSP treatment until its arrival in the import market). It is also been alleged that ceilings are sometimes set below minimum efficient plant size. This negates the intended trade and investment increasing incentives of the preferences.

- Until the above recommendations are fully accomplished, improved statistical information is required on constraints that Africa and other developing countries encounter in attempting to utilize preferences schemes. Details are needed on the extent to which quotas or ceilings are exceeded (with the result that additional African exports are taxed at the prevailing MFN rate) and the extent to which exports are disqualified due to existing rules of origin. Such information is central to any proper assessment of the economic impact of preferences on the receiving countries and to initiatives for improving these programs.

Several OECD policy initiatives could help alleviate Africa's international transport problems:

- Technical assistance. International shipping has undergone a major transformation in which procedures for cargo unitization, port operations, and related logistical functions have evolved into highly complex operations requiring a considerable degree of technical expertise. Since most African countries have limited access to such expertise, technical assistance programs (such as those provided by UNCTAD and the World Bank) should be expanded and also extended to related activities (such as customs clearance procedures) that impinge on the efficiency of international transport operations.

- Finance and development. Due to insufficient attention and funds, many African countries' fleets, ports, and connecting inland transport infrastructure have deteriorated, or have become technologically outmoded. OECD countries should sponsor a comprehensive survey and report on sub-Saharan Africa's transport problems along with policy proposals for their alleviation. Given the small size of many African countries, and its influence on cargo volumes and the utilization of efficient transport technologies, further attention should be given to the development of regional ports and required inland infra-structure.

- The situation of land-locked African countries needs special attention given the major problems these countries face in transiting their neighbor's territories. A major effort should attempt to identify the special trade problems of the land-locked African countries and formulate policy suggestions for their reduction.

- More information is needed on the incidence of Africa's international transport costs, particularly for exports to the EU and Japan, for policy analyses and research. Customs officials in these markets should make existing information available and improve procedures for the future collection, processing, and tabulation of transport cost data.

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I. Introduction: Trade and African Development Prospects

Economists have long recognized that expanded export opportunities can provide an important stimulus to developing countries' industrialization and growth. For example, Helleiner (1972), Keesing (1967) and Meier (1968) drew on economic theory to show how increased exports can accelerate growth through: (i) learning effects from the development of new products, technologies and information sources; (ii) opportunities to achieve scale economies that could not be realized in many developing countries' relatively small domestic markets; (iii) benefits from increased linkages between export industries and other sectors of the economy; (iv) weakening of monopoly elements that may affect foreign trade which, in turn, would result in more favorable import and export prices; or (v) less reliance on exports of primary commodities whose unstable prices may make development planning difficult. Numerous empirical studies (see among others Balassa 1977, 1984, Kravis 1970) document the superior growth and industrialization performance of developing countries that adopted outward oriented (export) growth strategies.¹

In spite of the potentially important positive effects attributed to increased exports, it is sometimes argued that OECD trade restrictions may impair developing countries ability to pursue trade related growth strategies.² Given the importance that has sometimes been attached to the potential negative impact of developed countries' trade barriers, this study examines their influence on sub-Saharan African exports. The focus is on Sub-Saharan Africa due to the below average growth and export performance of this region.³ From the mid-1950s to 1990 Africa's

¹Meier (1968, Chapter 7) provides a useful review of arguments advanced in support of outward oriented as opposed to import substitution policies. Key elements of the latter often center on the promotion of infant industries, or efforts to reduce expenditures of limited foreign exchange. See Yeats (1979, Chapter 2) or Little, Scitovsky and Scott (1970) for further assessments of import substitution policies.

²For example, the Commonwealth Secretariat (1982, p. 61) stated "Protectionist measures (in industrial countries) discriminate against developing countries. For not only has it been on the products in which these countries are primarily interested that most of the new quantitative restrictions have been imposed, but it is also the developing countries (especially the poorer ones) which have suffered most. The most important restrictions, as far as developing countries are concerned, have been on textiles and clothing; exports of this group of products are so significant for these countries, and increasingly so for the poorer and smaller ones, that they regard developments under the umbrella of the MFA as a barometer of developed country attitudes towards protectionism in general. Their experience in this respect has been discouraging."

³UNCTAD (1993) reports world trade grew at an annual rate of 6 percent over 1980-1990, yet the exports of sub-Saharan African countries *declined* by 2.1 percent over this interval. The UNCTAD report also shows African exports are more highly concentrated in primary commodities than are those of other developing countries.

share of global exports fell from 3.1 to under 1.2 percent -- a decline that implies associated export earning losses of about \$65 billion annually (1990 exports of sub-Saharan Africa totaled about \$38 billion). The objective of this study is to determine the extent to which "external" barriers and policies in OECD countries contributed to this decline. In addition, the study examines the role played by international transportation costs since recent investigations show the nominal equivalents of these charges on developing countries exports are often considerably greater than tariffs, and policy measures often are available for their reduction.

The study proceeds as follows. First, detailed information on the composition and direction of African exports is examined to identify markets and products on which this analyses should focus. An attempt is then made to determine which African countries and products were most heavily affected by pre-Uruguay Round tariffs and how this situation changed as a result of the negotiations. To help assess the restrictive effects of OECD tariffs, comparisons are made between those facing Africa and the successful developing country exporters in East Asia. East Asia is used as a standard for comparison since the tariffs applied to its exports did not stop these countries' sustained export-led industrialization drive after the mid-1960s. Profiles of pre-Uruguay Round nontariff barrier protection against African exports are also analyzed, and empirical analyses are undertaken to show and evaluate the changes resulting from the multilateral trade negotiations. The possibility that some elements of the Uruguay Round agreement on NTBs may have negative effects on African countries export prospects is considered, and policies Africa could adopt to avoid these adverse effects are discussed. In addition, this report also examines a number of policy options relating to tariffs and NTBs the OECD countries might adopt to improve the competitive position of African exports.

Using balance of payments information and national customs statistics the study examines the influence of air and vessel transport costs by estimating their ad valorem incidence on African exports relative to those on similar products from other countries. Given their transit problems, freight cost information for the "land-locked" countries is compared with that for other African exporters in order to determine the magnitude of the adverse differential transport barriers they face. The concept of "effective" protection is employed to assess the influence of transport costs on the location of export oriented industries in Africa, and to determine how freight costs affect African countries' ability to pursue natural resource based industrialization strategies. The study concludes with an overall

assessment of the findings and a discussion of policy options available to combat the adverse influence of trade and transport barriers. The basic conclusion is that OECD trade barriers have not played a major role in sub-Saharan Africa's relative decline in world trade over the last two or three decades. Rather, more attention must be given to the detrimental effects of the African countries' own domestic policies -- particularly those that influence transport costs. However, OECD members have policy options available that could improve the external environment for, and competitive position of, African exports. Given the dimensions of rural poverty in Africa, and the potential contribution increased agricultural exports could make toward its alleviation, OECD initiatives relating to this sector should have the highest priority.

II. The Destination and Composition of African Exports

Empirical analyses show major short, or even medium-term changes, in the origin or destinations of a country's trade do not frequently occur (see UNCTAD, 1992 and other years). Finance, commercial ties, transport and other logistical problems such as North-South liner conference routes are preventive factors, as are distance to alternative markets, or cultural elements like language differences (Safadi, Primo-Braga and Yeats, 1994). Established shipping routes tie some developing countries to a relatively few OECD markets, and efforts to trade with others may involve costly transshipment through way-ports. Therefore, one should focus on the effects of trade barriers in markets that are presently the major destinations of African exports since they will, in all likelihood, be of major importance within the near future.

Table 1 shows the value and share of individual African countries' exports to all developed and developing countries, as well as to selected regional destinations, while Figure 1 shows trade weighted totals for all sub-Saharan Africa. The latter also provides similar statistics for all developing countries as a group in order to show the extent that Africa's direction of trade differs from that of other developing countries. This is an important consideration since empirical research shows that countries which are overly dependent on a relatively few markets for imports and exports may experience adverse trade effects.⁴ Some caution is warranted regarding these comparisons, however, since it is generally accepted that some intra-African trade is unrecorded.

Table 1 and Figure 1 show sub-Saharan Africa's reliance on developed countries is considerably greater than average for developing countries with their dependence on OECD Europe being especially important. About

⁴Numerous "structure-performance" studies of industrial countries' domestic markets show a common pattern. When aggressive inter-firm competition is absent consumers pay higher (monopoly) prices, while other firm performance measures are poorer than in more competitive markets (See Bain 1951, Bell and Murphy 1969, or Mann 1966 for illustrative examples). Economists frequently employ measures like the share of the three largest firms in a market as an (inverse) proxy for the level of aggressive competition. Subsequent empirical studies show these conclusions also hold for international markets. That is, a country is likely to receive a lower price for exports, and pay a higher price for imports, if aggressive competition is absent from its foreign trade sector (See Avramovitch 1978, Edward 1972, Helleiner 1978, or Yeats 1981).

Table 1. The Geographic Destinations of Sub-Saharan African Countries' Exports; 1991 or Latest Year Available.

Exporting Country	World (\$ million)	Developed Countries	Major Geographic Destinations (%)							
			of which:				Eastern Europe	Socialist Asia	Developing Countries	of which: Developing Africa
			Europe	North America	Japan	Others				
Angola	3,105.4	78.1	25.1	52.6	0.1	0.3	0.8	0.1	20.8	1.5
Benin	49.1	74.7	55.8	5.7	13.3	—	0.9	3.4	18.0	18.0
Burundi	78.0	89.1	76.8	11.8	0.5	—	—	—	10.5	8.8
Burkina Faso	160.0	42.2	40.3	0.4	1.6	—	—	—	58.4	40.3
Cameroon	1,246.0	69.4	66.3	2.5	0.6	0.1	1.8	6.5	22.4	14.5
Cape Vert	6.5	92.3	61.5	29.2	1.5	—	—	—	7.7	7.7
Central African Rep.	139.5	94.8	94.1	0.6	—	0.1	—	0.4	4.8	3.6
Chad	132.8	37.2	31.4	0.1	5.7	—	—	—	52.8	54.7
Comoros	18.9	94.7	69.8	24.3	0.1	—	—	—	5.3	1.6
Congo	855.0	97.2	60.9	36.3	—	—	0.1	—	2.5	2.3
Cote d' Ivoire	2,953.0	61.7	53.5	7.1	0.7	0.4	2.6	0.2	29.3	26.8
Djibouti	17.4	65.7	63.0	0.1	0.1	—	—	—	34.2	9.1
Ethiopia	294.2	66.4	40.3	11.2	14.9	0.2	4.8	0.2	26.3	12.7
Equatorial Guinea	25.4	94.1	93.7	—	—	—	—	—	5.5	2.4
Gabon	2,460.5	82.8	47.7	29.7	4.1	1.2	0.4	0.7	15.2	3.6
Gambia	40.0	65.2	37.7	4.5	23.0	—	—	—	33.2	20.0
Ghana	1,198.9	81.6	63.4	12.8	5.4	0.1	4.6	0.2	10.0	3.1
Guinea	420.5	89.0	52.2	36.7	—	—	—	—	11.0	4.7
Guinea Bissau	11.7	76.1	66.7	9.4	—	—	—	—	23.9	0.1
Kenya	1,121.1	56.2	48.6	4.3	1.3	2.0	1.4	—	35.0	21.4
Liberia	379.9	80.0	77.1	1.5	0.9	0.4	1.0	—	19.0	0.2
Madagascar	314.0	88.9	64.4	14.6	9.8	—	1.7	1.1	6.9	3.1
Malawi	454.0	85.1	46.9	16.5	10.0	11.8	—	—	13.6	9.5
Mali	307.9	33.0	28.6	2.6	1.7	—	12.7	11.6	40.6	19.9
Mauritania	451.0	80.1	58.3	2.3	19.5	—	10.7	—	7.5	7.1
Mauritius	1,208.0	84.5	71.9	11.1	0.2	1.3	2.0	—	6.1	3.9
Mozambique	239.8	51.2	31.3	13.0	6.7	—	—	—	48.8	12.0
Niger	240.8	87.4	83.4	3.9	0.1	—	—	0.1	11.1	10.6
Nigeria	12,004.0	95.7	48.6	45.9	0.2	—	0.1	—	4.2	3.1
Reunion	210.2	12.9	7.2	—	4.8	9.1	—	—	87.1	9.8
Rwanda	99.3	82.8	75.7	6.3	0.7	—	—	4.4	6.9	2.3
Sao Tome & Principe	7.5	96.0	96.0	—	—	—	—	—	4.0	—
Senegal	737.7	63.6	60.7	0.4	2.5	—	—	—	28.8	16.5
Seychelles	18.2	72.5	70.4	—	—	—	—	—	27.1	20.3

Table 1. Continued.

Exporting Country	World (\$ million)	Major Geographic Destinations (%)								
		Developed Countries	of which:				Eastern Europe	Socialist Asia	Developing Countries	of which:
			Europe	North America	Japan	Others				Developing Africa
Sierra Leone	145.4	96.5	59.1	36.2	1.3	—	—	—	1.5	1.3
Somalia	81.0	61.1	60.2	0.4	0.5	—	—	0.5	38.4	1.0
South Africa, Rep.	17,052.0	80.4	55.2	12.4	10.8	2.0	0.1	—	15.3	6.1
Sudan	554.0	35.4	26.1	3.2	6.0	—	9.0	1.6	53.8	1.1
Togo	306.4	52.0	38.2	13.0	0.2	0.6	6.5	0.1	41.4	19.2
Uganda	152.1	90.5	76.5	10.6	3.3	0.1	0.4	—	9.1	7.1
Tanzania, United Rep.	404.0	68.7	59.4	4.5	4.5	0.3	1.8	0.8	30.7	7.1
Zaire	853.0	84.5	54.8	22.2	7.4	0.1	1.2	1.2	11.2	5.4
Zambia	1,347.5	65.7	34.5	1.6	29.1	0.4	—	12.3	21.8	11.9
Zimbabwe	1,467.6	73.4	44.1	7.3	5.5	16.6	0.6	1.8	23.9	17.2
MEMO ITEM										
All Sub-Saharan Africa	54,657.2	80.6	51.2	22.1	5.6	1.4	0.9	0.7	15.4	7.5
All Developing Countries	708,947.0	63.1	25.5	24.0	12.0	1.3	3.1	3.6	27.2	2.6

Note: The shares shown in Table 1 may not sum to 100 since some sub-Saharan countries trade has not been fully allocated to proper country destinations. That is, some exports are classified as going to "not elsewhere specified" (n.e.s.) destinations, "not elsewhere classified" (n.e.c.) destinations, or to bunkers and ships stores.

Source: Compiled from United Nations COMTRADE records or United Nations Conference on Trade and Development, Handbook of International Trade and Development Statistics 1992, (New York: United Nations, 1992).

Figure 1: The Destination of Sub-Saharan Africa's and All Developing Countries Exports

80 percent of the SSA countries' exports go to developed countries, and the proportion for Cape Verde, Central African Republic, the Comoros, Congo, Equatorial Guinea, Nigeria, Sao Tome and Principe, Sierra Leone and Uganda exceeds 90 percent. Overall, the share of African exports going to developed country markets is 18 percentage points higher than that for all developing countries, while OECD Europe's share is twice as high (51.2 versus 25.5 percent). Collectively, the share of sub-Saharan African exports to other developing countries is 12 points lower than average, while Japan's share (under 6 percent) is about one-half the developing country average. Developments in Europe, therefore, are of primary importance for any assessment of the near term prospects for African exports.

Having established that OECD markets constitute the major destinations for African exports, a related question concerns the composition of Africa's exports? Table 2 provides statistics on the product composition of each African country's exports while Figure 2 provides similar information for the region as a whole. To facilitate comparisons similar statistics are also given for all developing countries combined. As shown, sub-Saharan African exports consist of a far higher share of agricultural materials, and minerals and nonferrous metals than exports from all developing countries combined (61 versus 33 percent), and a much lower share of manufactures (19 versus 54 percent). Mauritius, the Republic of South Africa and the Central African Republic are outliers with one-third, or more, of their total exports consisting of manufactured goods.⁵ This point is important since materials which normally serve as production inputs (i.e., the types of export goods Africa specializes in) typically face low or zero tariffs and relatively few NTBs. For example, the four largest products, namely, crude petroleum (SITC 331), pearls and precious stones (SITC 667), cocoa (SITC 072) and coffee (071) account for 66 percent of African exports to the OECD. None of these items encounter nontariff measures in the European Union, Japan and United States. Japan, however, does apply quantitative restrictions to some refined petroleum products. Also, import duties are zero on these products, although EU tariffs range from 8 to 16 percent on coffee extracts and several coffee

⁵Manufactures include items in SITC 5 through 8 less SITC 68 (nonferrous metals). Included within this range is the three-digit group "pearls and precious stones" (SITC 667). The SITC system does not distinguish between cut and polished gems (which should be considered a manufacture) and uncut gems (which should not). The Central African Republic's exports are composed mostly of uncut stones which, due to the deficiency in the SITC system, are classified as manufactures. In other words, if uncut stones could be identified separately the share of manufactures in the Central African Republic's exports probably would be far lower than shown in Table 2.

products above the roasted bean stage. OECD trade barriers are, however, applied with an above average frequency to temperate zone agricultural products and labor intensive manufactures -- goods which constitute a relatively low share of African exports (see UNCTAD 1993 or Laird and Yeats 1990).

Table 2. The Structure of Sub-Saharan African Countries' Exports; 1990 or Latest Year Available.

		By Main Categories of Export Products (percentage)								
		AGGREGATE SITC GROUPS					Manufactures, of which:			
		All Foods	Agricultural Materials	Fuels	Ores & Metals	Manu- factures	Chemicals	Other Manufactures	Machinery & Transport	
Exporting Country	Value (\$ million)									Unallocated Trade
Angola	1,296.4	16.4	0.3	82.1	—	1.0	—	0.5	0.4	0.2
Benin	49.1	61.8	25.0	4.2	1.1	3.4	0.4	1.9	1.1	4.5
Burundi	75.0	65.7	3.6	—	2.5	2.0	0.1	1.6	0.3	26.1
Burkina Faso	160.3	27.5	42.0	—	0.1	11.0	0.1	8.1	2.8	19.4
Cameroon	1,281.6	35.5	19.0	18.0	11.4	15.2	1.6	8.3	5.2	0.9
Cape Verde	6.5	50.8	3.1	—	26.2	12.3	—	6.2	6.2	7.7
Central African Republic	139.5	17.3	27.6	—	5.2	48.2	0.1	47.6	0.6	1.7
Chad	132.8	44.6	45.9	—	0.3	9.0	0.5	3.5	5.1	0.2
Comoros	12.4	71.0	1.6	—	0.8	26.6	25.0	1.6	—	—
Congo	776.9	1.3	9.0	81.4	1.4	6.6	—	5.7	0.9	0.4
Cote d' Ivoire	2,940.4	49.9	18.3	14.5	0.3	16.8	3.5	11.3	2.1	0.2
Djibouti	24.9	39.1	4.7	—	0.2	7.8	0.2	1.0	6.0	—
Ethiopia	294.2	63.3	25.1	6.2	—	5.3	2.0	3.2	—	0.1
Equatorial Guinea	25.4	57.9	30.0	—	7.5	4.0	—	2.6	0.6	—
Gabon	1,692.8	1.1	10.6	74.2	10.6	3.4	1.7	1.5	0.2	0.2
Gambia	40.6	72.9	0.5	—	0.2	25.9	—	25.1	0.7	0.5
Ghana	1,072.3	41.0	11.1	3.4	21.2	13.4	0.1	13.0	0.3	9.9
Guinea	420.5	3.4	0.3	—	95.0	0.5	—	—	0.2	—
Guinea Bissau	11.7	73.0	2.0	—	7.8	4.9	1.6	1.4	1.6	—
Kenya	1,054.3	58.5	7.7	14.2	1.4	17.3	3.1	12.6	1.7	0.9
Liberia	404.4	8.8	29.1	0.1	59.7	1.0	0.1	0.4	0.5	1.4
Madagascar	321.9	69.7	4.5	1.0	9.4	15.2	1.5	12.7	1.0	0.2
Malawi	417.6	90.5	3.2	—	0.1	4.8	—	4.6	0.2	1.4
Mali	270.7	22.6	65.8	0.1	0.1	6.8	0.1	4.4	2.3	4.6
Mauritania	447.1	47.3	0.4	1.9	48.6	0.5	—	0.2	0.3	1.1
Mauritius	1,180.5	31.1	0.5	—	0.1	68.1	0.3	65.1	2.7	0.2
Mozambique	101.1	65.7	4.0	0.1	12.1	17.5	0.4	15.5	1.6	0.7
Niger	579.7	11.4	0.6	1.1	84.7	2.0	—	1.5	0.5	0.1
Nigeria	13,649.3	1.8	1.5	93.6	0.7	2.1	0.3	1.6	0.2	0.3
Reunion	185.6	82.4	0.5	0.2	0.4	16.6	2.5	5.8	8.3	—
Rwanda	97.6	69.2	9.1	—	2.4	4.7	2.8	1.7	0.2	14.7
Sao Tome & Principe	7.4	91.2	2.2	—	0.2	6.3	1.7	1.6	1.6	—
Senegal	782.6	53.2	2.7	12.4	9.3	22.5	14.9	5.2	2.4	—
Seychelles	34.2	37.1	0.3	55.6	—	7.0	—	2.0	5.0	—

Table 2. Continued.

		By Main Categories of Export Products (percentage)								
		AGGREGATE SITC GROUPS					Manufactures, of which:			
		All Foods	Agricultural Materials	Fuels	Ores & Metals	Manu- factures	Chemicals	Other Manufactures	Machinery & Transport	
Exporting Country	Value (\$ million)									Unallocated Trade
Sierra Leone	142.8	24.6	3.9	3.5	40.9	26.1	--	26.0	0.1	1.0
Somalia	81.0	90.4	6.8	0.2	1.1	1.1	--	0.5	0.6	0.4
South Africa, Republic of	18,968.8	13.6	9.2	13.9	26.4	34.4	6.5	24.3	3.6	2.5
Sudan	573.0	38.6	59.5	--	0.3	1.0	--	0.3	0.7	0.5
Togo	267.9	23.0	21.5	--	44.7	9.1	0.4	8.0	0.7	1.8
Uganda	152.1	88.9	10.0	--	0.1	1.1	0.1	0.3	0.6	--
Tanzania, United Republic	284.9	49.2	22.4	1.5	14.5	11.8	0.9	8.4	2.5	0.5
Zaire	999.3	8.7	4.5	12.7	55.2	16.6	0.1	15.7	0.8	2.3
Zambia	1,347.5	3.9	1.4	0.1	83.4	11.2	0.1	10.8	0.3	0.1
Zimbabwe	1,467.6	44.1	7.3	0.7	15.9	30.9	1.7	25.6	3.6	1.1
<u>MEMO ITEM</u>										
All Sub-Saharan Africa	53,688.4	18.5	8.3	36.3	16.6	18.8	3.0	13.8	2.0	1.5
All Developing Countries	708,947.0	11.4	3.3	26.0	4.2	53.9	3.8	29.9	17.4	1.2

Source: Data Compiled from United Nations COMTRADE records and UNCTAD, Handbook of International Trade and Development Statistics, 1992. In some cases the total trade values reported in this table may differ from those shown in Table 1. Where this occurs data on the direction of trade had to be taken from a different year than the above statistics on the composition of trade.

Note: In terms of the SITC (Revision 1) classification the products groups shown in this table are defined as follows: All foods and Feeds (SITC 0+1+22+4); Agricultural Raw Materials (SITC 2-22-27-28); Fuels (SITC 3); Ores, Minerals and Metals (SITC 27+28+68); Manufactures (SITC 5+6+7+8-68); Chemicals (SITC 5); Other Manufactures (SITC 6-68); Machinery and Transport (SITC 7).

Figure 2: The Commodity Composition of Sub-Saharan Africa's and Developing Countries' Exports

III. OECD Tariff Barriers Facing Africa

A problem which complicates assessments of the importance of tariff barriers in OECD countries is the widespread departure from the most-favored-nation (MFN) principle in their trade regimes. Recently these departures have taken the form of regional trade preferences, such as the Canada-United States Free Trade Arrangement, NAFTA, the Australia-New Zealand Free Trade Arrangement, or European Community and EFTA preferences for Eastern Europe.⁶ Developing countries receive important trade preferences under the OECD countries' Generalized System of Preference (GSP) schemes, and through preferences extended under the European Union's Lomé Convention to former colonial associates, while the US Caribbean Basin Initiative (CBI) extends tariff preferences to Caribbean countries.⁷ Developing countries in Africa receive one of two types of general preferences: those the EU provides under the Lomé Convention, and those extended under the GSP. Many GSP schemes differentiate between developing countries and United Nations designated "least developed countries" (LDC) and extend even lower preferential tariffs to the latter. Least developed countries in Africa are: Benin, Botswana, Burkina Faso, Burundi, Cape Verde, Central African Republic, Chad, Comoros, Djibouti, Equatorial Guinea,

⁶Braga and Yeats (1992, Table 1) estimate that almost 50 percent of world trade in manufactures occurs under preferences. European trade accounts for almost two thirds of this total with the EU and EFTA arrangements being of particular importance. Aside from the intra-trade of countries within these two groups, which is all duty free, a protocol allows for duty free trade in manufactures between EU and EFTA. According to Braga-Yeats tabulations the European arrangements cover a trade value more than *seven times greater* than that of NAFTA intra-trade. See Harmsen and Leidy (1994) for a listing of free trade arrangements that have been notified to the GATT.

⁷Several points should be noted concerning GSP preferences. First, some agricultural and manufactured products are exempted from their coverage and developing countries' exports of these goods encounter MFN tariffs. The exemptions are important as UNCTAD (1994, p. 8) estimates that approximately 51.6 percent of developing countries' exports of products subject to OECD MFN duties are afforded preferences. However, for various reasons like preference ceilings or rules of origin only about 50 percent of GSP eligible products actually receive this treatment. This implies that preferential terms of market access only occurs for about one-quarter of developing countries' exports of goods subject to MFN duties. Second, GSP treatment may be withdrawn from specific products once predetermined ceilings are reached. Third, several countries like Singapore, Hong Kong and Taiwan (China) have been "graduated" from GSP schemes (it is unlikely this would happen to a SSA country in the foreseeable future) and no longer receive their tariff preferences. Other developing country suppliers may also have GSP preferences withdrawn if they fail "competitive need" tests, i.e., they are judged able to compete successfully with other suppliers without preferences.

Ethiopia, Gambia, Guinea, Guinea-Bissau, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mozambique, Niger, Rwanda, Sao Tome and Principe, Sierra Leone, Somalia, Sudan, Togo, Uganda, Tanzania, Zaire and Zambia.

A. Tariff Protection Against African Exports

The previous analysis showed Sub-Saharan exporters are primarily dependant on developed countries for export markets and, within this group, the European Union is of special significance. Analysis of the terms of access that African countries have in the EU is, therefore, of key importance in any assessment of the influence of tariffs on African exports. Table 3 summarizes the pre-Uruguay Round profile of tariffs facing African countries in this market by showing the number of products exported from Africa that faced: (i) zero MFN duties; (ii) preferences that reduced the duty paid to zero; (iii) non-zero preference rate lines; and (iv) products where the African country faced a non-zero MFN tariff. These data attest to the overall extent of European preferences for Africa, although it should be noted that the ability of African countries to effectively utilize these preferences may be diminished by ceilings (after these ceilings are exceeded further imports are taxed at the MFN rate), or by nontariff barriers applied independently from the preference programs. Import quotas applied under the MFA, for example, diminish the ability of some developing countries to utilize textile and clothing preferences. Finally, for comparison, the table contrasts the African countries' situation with that of two more industrialized exporters, namely, Republic of Korea and Taiwan (China).

Table 3 shows that most African countries' exports are concentrated in a relatively few tariff lines and EU trade preferences cover a high share of these items. As an illustration, Angola exported 134 tariff line products to the European Union (see the right most column -- the EU customs schedule contains 9,506 lines) and 25 of these items faced a zero MFN tariff. However, on 106 line items Angola received a zero preference rate (second column from the left) with the result that 131 or 98 percent of its exports enter the EU duty free -- provided that they satisfied established EU "rules of origin" and did not exceed any existing ceilings. In two tariff lines (involving exports of fresh grapes and strawberries) Angola did not receive preferences and, as a result, paid the full MFN tariff.

Table 3. Sub-Saharan Export Products Facing MFN or Preferential Duties in the European Union (No. of tariff line items)

Exporting Country	Tariff Lines Facing a Zero MFN Duty	Zero Preference Rate Lines	Total Lines with Zero Duties*	Non-Zero Preference Rate Lines	Zero Duty or Preference Rate Lines*	Non-Zero MFN Duty Lines	Total Tariff Lines Exported
Angola	25	106	131 (98)	1	132 (98)	2	134
Botswana	33	94	127 (99)	0	127 (99)	1	128
Cameroon	95	411	506 (98)	4	510 (99)	4	514
Central African Rep.	41	83	124 (98)	0	124 (98)	3	127
Chad	21	51	72 (97)	1	73 (99)	1	74
Congo	57	173	230 (100)	0	230 (100)	0	230
Cote d'Ivoire	121	595	716 (97)	6	722 (98)	14	736
Ethiopia	67	111	178 (98)	1	179 (99)	2	181
Gabon	55	261	316 (100)	0	316 (99)	1	317
Ghana	63	250	313 (99)	2	315 (99)	2	317
Guinea	50	109	159 (100)	0	159 (100)	0	159
Kenya	108	438	546 (98)	4	550 (98)	10	560
Liberia	57	84	141 (96)	1	142 (97)	5	147
Madagascar	63	278	341 (97)	2	343 (98)	8	351
Malawi	28	140	168 (98)	2	170 (99)	1	171
Mali	34	146	180 (99)	1	181 (99)	1	182
Mauritania	18	125	143 (99)	0	143 (99)	4	144
Mauritius	46	588	634 (99)	2	636 (99)	6	642
Niger	29	151	180 (99)	1	181 (99)	1	182
Nigeria	127	392	519 (99)	3	521 (99)	4	525
Senegal	90	375	465 (98)	4	469 (99)	6	475
Sierra Leone	30	78	108 (98)	0	108 (98)	2	110
Sudan	55	84	139 (99)	1	140 (99)	1	141
Swaziland	20	118	138 (98)	5	143 (96)	6	149
Togo	48	170	218 (96)	2	220 (97)	6	226
Uganda	25	60	85 (97)	0	85 (97)	3	88
United Rep. Tanzania	79	219	298 (99)	1	299 (99)	2	301
Zaire	97	217	314 (98)	0	314 (98)	7	321
Zambia	48	125	173 (93)	8	181 (97)	5	186
Zimbabwe	91	451	542 (97)	8	550 (99)	6	556
MEMO ITEM							
Taiwan, China	192	0	192 (4)	0	192 (4)	4,080	4,272
Republic of Korea	153	0	153 (4)	0	153 (4)	3,350	3,503

Source: World Bank-UNCTAD SMART Database. These statistics relate to 1988 trade patterns.

* Figures in parentheses show the share of the country's tariff line exports that receive the indicated tariff treatment.

The data for other African exporters reveal a situation similar. Preferences result in at least 97 percent of each African country's exports entering the EU free of duty, and in two cases (Congo and Guinea) no duties were paid on any line item. Table 3 also shows how markedly the profile of protection against Africa differs from that of countries like the Republic of Korea and Taiwan (China). Only four percent of the latter's exports (less than 200 tariff line items out of a total of over 4,000) have duty free access -- not due to preferences, but because of a zero MFN rate. These comparisons underscore existing differences in the scope of what the European Union might do to improve conditions of market access for different countries. The EU could make major improvements in market access for Korea and Taiwan (PC) by extending preferences to their exports, but many of the African goods already receive such treatment. Another key point to note is that current OECD tariffs facing Africa are far less of an obstacle than were those the Asian NICs faced (and overcame) when they began their successful export oriented industrialization drive (see Box 1). This is due both to the effect of preferences, and the success of the Kennedy, Tokyo and Uruguay Round in reducing tariff barriers.

Table 4 extends the foregoing analysis by examining the average preference margins African countries have over other exporters to the European Union, United States and Japan. The table shows the average nominal tariff on African exports to these three markets along with their average preference margin -- a negative figure indicates the number of percentage points the African duty was below that on other countries. For example, Angola faced EU tariffs that averaged three-tenths of one percent, a rate 3.2 percentage points below the average for all other exporters of the same products.⁸ Similar statistics for Taiwan (China) and the Republic of Korea have again been included for comparison of the relative importance of OECD tariff barriers facing African and Asian countries.

⁸The duties in Table 4 are unweighted averages of pre-Uruguay tariffs on an African country's exports and those facing its competitors. The tariff facing "other" exporters is the average of the MFN, GSP, Least Developed, ACP, or regional preference tariff actually applied to imports from all other individual suppliers of the same items. Some industrial and advanced developing countries may face duties that are considerably higher than suggested by these African preference margins if there are significant imports from other Sub-Saharan countries, or if other preferences (GSP, EFTA-EEC, Least Developed, regional arrangements, etc.) cover a high share of trade.

Box 1

**Tariffs Facing East Asian Exporters at the Start of their Industrialization Drive
Compared with those Facing Sub-Saharan Africa Today**

One way to assess the current importance of OECD trade barriers facing sub-Saharan Africa is to compare them with those that faced the "newly industrialized countries" (NICs) when the latter began their successful export oriented industrialization drive that began in the mid-1960s. Since the NICs' experience shows that the external barriers they faced could be overcome, such an inter-temporal comparison could help indicate whether Africa's export problems are largely attributable to OECD countries' protectionism, or to African internal policies and conditions relating to the export sector. Stated differently, are external conditions now facing Africa more or less favorable than those which faced the NICs in the mid-1960s.

The statistics shown below report the average level of tariffs countries like Republic of Korea, Hong Kong, Singapore and Taiwan (China) faced in major OECD markets in the late 1960s. Industrial countries import duties facing their exports averaged about 17 percent and reached a high of 19.5 percent in the United Kingdom. The statistics also indicate that developed countries' tariffs then incorporated a high degree of discrimination against developing countries. This is reflected in the considerably higher than average tariffs on developing countries' exports than on all shipments. Two other points should be noted. First, in the 1960s GSP schemes had not yet been adopted so the Asian NICs had to compete with other suppliers on an equal MFN basis. Second, the degree of escalation in OECD tariffs was far greater than it is today (UNCTAD (1968), Yeats (1987)).

Import Market	Mid-1960 Tariff Averages on Total Imports of Manufactures	Mid-1960 Tariff Averages on Imports of Manufactures from Developing Countries
United States	11.5	17.9
United Kingdom	15.2	19.5
European Community	11.0	14.3
Sweden	6.6	9.8
Japan	16.1	18.0
All Developed Countries	10.9	17.1

Source: UNCTAD, The Kennedy Round Estimated Effects on Tariff Barriers, (TD/6/Rev. 1), (New York: United Nations, 1968).

In contrast to the situation the Asian NICs faced (and overcame), OECD countries tariffs on African exports now average under one percent and typically incorporate an important preferential component which enhances their ability to compete with many other countries. OECD tariffs facing Africa are, therefore, now far lower than those which the NICs successfully overcame and incorporate preferences that improve Africa's position *vis-a-vis* other suppliers. Africa's relatively poor general export performance cannot be attributed to OECD tariffs.

Could it be that nontariff measures are now more restrictive against African exports than they were against the Asian NICs? Available evidence suggests the opposite. For example, the Short-Term Textile Arrangement was initiated in 1961 and followed by the Long-Term Textile Arrangement in 1962. Both placed important textile and clothing restrictions on the NICs exports of textile and clothing products. Sub-Saharan African countries are currently (with the exception of Mauritius) largely unrestricted by MFA controls on textile and clothing exports. "Voluntary" export restraints (VERs) were extensively applied to NIC exports in the 1970s and 1980s, yet no such restraint was ever applied to Africa's exports. Furthermore, while there is evidence that agricultural protectionism has increased (Laird and Yeats, 1989) this has largely been confined to temperate zone products and not the types of goods Africa exports.

In short, the external environment for exports facing Africa today appears to be considerably more favorable than that which faced, and was overcome by, the Asian NICs. This suggests that internal problems are a more important cause of Africa's trade problems than are trade barriers in foreign markets.

Table 4. The Incidence of OECD Tariffs on Sub-Saharan African Countries Non-Oil Exports (all figures in percent).

Exporting Country	OECD Average		European Union		Japan		United States	
	African Tariff	Preference Margin*	African Tariff	Preference Margin*	African Tariff	Preference Margin	African Tariff	Preference Margin
Angola	0.2	-1.5	0.3	-3.2	1.8	0.0	0.1	-0.4
Botswana	0.3	-2.8	0.1	-2.9	0.0	-2.1	3.5	-1.1
Cameroon	0.4	-2.5	0.1	-2.8	0.0	0.0	2.1	-1.1
Central African Rep.	0.2	-2.2	0.2	-2.3	0.0	0.0	9.0	-1.1
Chad	0.4	-2.7	0.2	-2.9	2.5	0.0	1.6	0.0
Congo	0.1	-1.4	0.0	-2.2	0.0	0.0	0.3	-0.6
Cote d'Ivoire	0.7	-3.1	0.3	-3.3	1.2	-0.5	3.3	-2.0
Ethiopia	0.7	-1.3	0.1	-1.9	1.5	-1.3	2.0	0.4
Gabon	0.6	-2.0	0.0	-2.7	0.0	0.0	2.9	0.7
Ghana	1.0	-2.2	0.1	-3.1	2.3	0.0	2.6	-0.9
Guinea	0.6	-3.3	0.0	-2.9	1.8	-1.9	1.9	-1.0
Kenya	0.5	-3.3	0.2	-3.5	2.4	-1.1	3.1	-2.3
Liberia	0.6	-1.7	0.3	-1.9	0.0	-0.3	2.5	-1.1
Madagascar	0.5	-2.0	0.4	-2.7	0.8	-0.2	0.8	-1.0
Malawi	1.1	-2.4	0.1	-3.5	0.0	-0.1	5.4	-0.6
Mali	0.4	-3.4	0.2	-3.5	0.0	-1.6	3.1	-2.2
Mauritania	1.7	-2.3	0.2	-3.9	3.6	-0.4	1.2	-1.6
Mauritius	1.3	-3.1	0.2	-3.4	4.8	-1.1	6.4	-1.8
Niger	0.1	-3.0	0.0	-3.0	0.0	0.0	3.3	-1.6
Nigeria	2.7	-0.9	0.1	-2.6	3.7	-0.8	5.2	0.7
Senegal	0.5	-3.3	0.3	-3.5	3.6	0.1	4.9	-1.2
Sierra Leone	0.5	-3.1	0.0	-4.0	2.6	-0.7	2.3	-0.2
Sudan	0.1	-1.5	0.1	-1.9	0.0	0.0	0.7	-1.0
Swaziland	0.8	-4.4	0.5	-4.9	6.7	-3.0	3.5	-1.9
Togo	0.3	-2.8	0.2	-2.8	9.8	-0.8	0.2	-2.8
Uganda	0.9	-2.4	0.6	-3.0	0.0	0.0	2.1	-0.3
United Rep. Tanzania	0.1	-2.3	0.0	-2.5	1.4	-1.0	0.0	-2.4
Zaire	0.3	-2.1	0.1	-2.4	0.0	-0.5	1.3	-1.1
Zambia	0.3	-1.7	0.5	-2.9	0.0	-0.6	1.4	-1.4
Zimbabwe	0.9	-2.5	0.2	-3.3	1.2	-1.0	4.0	-1.0
MEMO ITEM								
Taiwan, China	6.1	0.9	7.5	4.0	2.2	-2.2	6.8	0.7
Republic of Korea	6.0	0.6	7.8	4.2	2.5	-2.2	7.1	0.7

*These values show the preferential tariff margin (in points) that the African country has over all other suppliers of the same goods. A negative value indicates the country pays a lower average tariff than other exporters. The United States does not extend GSP tariffs to Taiwan (China), the Republic of Korea, or to OPEC members.

Source: World Bank-UNCTAD SMART Database

In Europe, the average tariff facing Africa typically ranges from zero to three-tenths of a percent with Uganda recording a high of 0.6 percent -- due mostly to a tariff of 18 percent on its exports of fresh grapes.

The average preference margins African countries received are in the two to four percentage point range, and reach a high of 4.9 points for Swaziland.⁹ Although the margins vary, all African countries faced average tariffs that were below those paid by other exporters. For some products these preferential tariff margins were 20 percentage points or more below prevailing MFN tariffs. This situation is markedly different from that of the Asian NICs. Taiwan (China) paid an average tariff of 7.5 percent on its exports -- a rate that was 4.0 percentage points higher than that facing other exporters of the same items. EU tariffs facing Korea average 7.8 percent -- 4.2 points higher than that facing other exporters (many of which receive preferences).

Due to the important role that textiles and clothing played in the early stages of some countries industrialization, note should be made of the US failure to provide African countries (even those classified as least developed) any preferences for these goods. As a result, African exports face post Uruguay Round tariffs on textile and clothing products that may exceed 25 percent. Table 4 summarizes the profile of preferences that African countries receive (under the GSP) in the United States and Japan, and contrasts this treatment with that in Europe.

Several important points are evident from the table. First, the average pre-Uruguay Round United States and Japanese tariff is often higher than in Europe (i.e., an average 9.8 percent duty is paid on Togo's exports to Japan; the tariffs on Mauritius' exports to the United States average 6.4 percent) and the margins of preference are often lower. The high Japanese average was largely due to a MFN tariff of 25 percent on Togo's exports of prepared and preserved tomatoes, while the results for Mauritius were due to US MFN tariffs of up to 35 percent on a number of textile and clothing products including men and boys shirts, babies blouses, and sweaters. In several cases where Canada and Israel had a high volume of exports to the US, FTAs resulted in zero tariff being

⁹Swaziland exports mandarin and other oranges to the European Union and pays a full MFN duty of 4 percent on these shipments -- as it does on exports of a several fresh agricultural products including asparagus, lemons and other citrus. Outside the agricultural sector, Swaziland faces a MFN tariff of 8.5 percent on coal exports to the EU of about \$1.6 million.

applied to competitors' products with the result that African exporters paid a higher-than-average duty.¹⁰

B. The Influence of Tariffs on African Commodity Processing

In multilateral negotiations like the Uruguay Round, developing countries' have attempted to remove constraints, like escalating tariffs in foreign markets, to the further processing of domestically produced commodities. The rationale for such efforts is that local commodity processing might have important employment creation effects, it may increase the number of trade contacts and provide benefits associated with "outward-oriented" policies, there may be important linkages between the processing industry and other sectors of the economy, and it may produce an increase in export revenues due to the higher value added content of processed goods (see Roemer 1979 or Yeats 1981 for a survey of relevant issues). Since African countries' exports include a large share of unprocessed agricultural and mineral commodities (see Table 2), they naturally have a strong interest in the further processing of these goods before export. Has this objective been frustrated by OECD trade barrier escalation?¹¹

Given the special relations between Africa and many industrial countries (particularly those in Europe), very little empirical evidence has, thusfar, been compiled that is relevant to this question -- at least as far as sub-Saharan Africa is concerned. Previous analyses of tariff escalation focused almost entirely on the structure of most-favored-nation tariffs, and the possibility exists that import duties may behave differently once account is taken of the GSP, Lome Convention, or Least Developed preferences Africa receives.

Table 5 utilizes a processing chain scheme developed by the World Bank (see Yeats 1991 for details) to

¹⁰Adverse African tariff differentials are largest for Gabon and Nigeria because US customs regulations preclude the extension of GSP treatment to OPEC members. In addition, the United States does not extend GSP treatment for textile and clothing products. As a result, textile and clothing exports from these countries face a U.S. MFN duty of over 20 percent. Ethiopia also had GSP treatment withdrawn due to US opposition to the government's policies.

¹¹OECD tariffs generally increase or "escalate" as one moves from primary to semi-fabricated to processed stages of a given commodity. Developing countries maintain this tariff structure is an important constraint to the further processing of their natural resources before export. Section D of the Punta del Este (Uruguay Round) Ministerial Declaration states that the "negotiations shall aim to achieve the fullest liberalization of trade in natural-resource based products, including in their processed and semi-processed forms. The negotiations shall aim to reduce or eliminate tariffs and nontariff measures, including tariff escalation."

analyze the structure of European Union tariffs on 19 primary commodities exported from Africa. The classification scheme normally identifies a primary, semi-processed, and processed stage for the commodities defined in terms of the SITC Revision 1 system, although in 7 of the chains differentiates between a primary and processed stage. The table shows the import duty actually applied to African exports of the processed stage(s) (the primary stage item always faced a zero MFN duty) and also indicates the margin of preference afforded Africa countries. The latter figures relate to three different situations: (i) where African GSP, Lome and least developed beneficiaries all receive preferences; (ii) where preferences are extended to African Lome and least developed countries; and (iii) where only Lome convention countries receive preferences (see the notes to Table 5).

Viewed in this context, tariffs do not appear to have been a major general constraint to the further processing and export of African commodities (provided that eligible exports actually get "due" preferences), although escalation -- which would work against further processing -- is evident in several "MFN covered" chains. In addition, the fact that different groups of countries are afforded preferences at various stages of the chains could also pose a constraint to further commodity processing in some cases. For example, all African countries receive full EU duty free preferences over all stages of the wood, rubber and leather chains, while only the least developed and Lome Convention countries receive full preferences for wool and cotton products (i.e., GSP receiving countries are excluded). The latter would, therefore, encounter an obstacle to further processing activity at the cotton and wool yarn stages.

For the 19 commodities listed, all three groups of African countries receive full preferences on all stages of 58 percent (11) of the chains. In these cases the margins of preference range from 2.6 percent (tin) to 15.1 percent for wool. That is, for these important commodities not only do tariffs not escalate against Africa (a zero duty is applied to all stages of the chain), but Africa receives preferences that should improve its ability to compete internationally and enhance its attraction as a location for commodity processing.

Outside these 11 chains there is some variation in the countries designated as preference beneficiaries that reduce their utility to sub-Saharan Africa as a whole (although they do improve some African countries ability to compete against others). For three chains (groundnuts, cotton and wool) preferences are extended only to least developed and Lome Convention countries with the result that GSP eligible countries face a tariff on the processed

Table 5. Margins of EU Tariff Preferences Provided Sub-Saharan African Countries Over Commodity Processing Chains

Processing Chain	Stage of Processing	African Preferential Tariff				
		Stage 1 Tariff	Stage 2		Stage 3	
			African Tariff	Pref. Margin	African Tariff	Pref. Margin
<u>Agricultural Materials</u>						
Wood	Rough Logs-Sawn Lumber-Plywood and Veneers	0.0	0.0	3.3	0.0	6.5
Rubber	Natural Rubber-Vulcanized or Unvulcanized Rubber-Rubber Manufactures	0.0	0.0	3.4	0.0	4.7
Leather	Hides and skins-Leather-Leather Manufactures	0.0	0.0	3.5	0.0	8.3
Jute	Raw Jute-Jute Yarn-Jute Fabrics	0.0	0.0	3.0	0.0	8.6*
Cotton	Raw Cotton-Cotton Yarns-Cotton Fabrics	0.0	0.0	6.0*	0.0	10.0*
Flax	Raw Flax and Ramie- Flax and Hemp Yarn	0.0	0.0	4.6	--	--
Wool	Raw Wool-Wool Yarn-Wool Fabrics	0.0	0.0	5.1*	0.0	15.1
<u>Ores and Minerals</u>						
Iron	Iron Ore-Pig Iron-Iron Plate, Bars and Strip	0.0	0.0	2.9**	0.0	5.4
Manganese	Manganese Ore-Ferromanganese	0.0	0.0	3.8**	--	--
Copper	Copper Ore-Unrefined Copper-Copper Bar and Sheet	0.0	0.0	0.0	0.0	6.2
Nickel	Nickel Ores-Unwrought Nickel-Nickel Bar and Sheet	0.0	0.0	0.0	0.0	4.6
Lead	Lead Ores-Unwrought Lead-Lead Bars and Sheet	0.0	0.0	3.5**	0.0	8.5
Zinc	Zinc Ores-Unwrought Zinc-Zinc Bars and Sheet	0.0	0.0	3.5**	0.0	8.0
Tin	Tin Ores-Unwrought Tin-Tin Bars and Plate	0.0	0.0	0.0	0.0	2.6
<u>Oilseeds</u>						
Groundnuts	Groundnuts-Groundnut Oil	0.0	0.0	7.5*	--	--
Copra	Copra excl. Flour-Coconut Oil	0.0	0.0	12.5***	--	--
Palm nuts	Palm Nuts and Kernel-Palm Kernel Oil	0.0	0.0	12.5***	--	--
Soya bean	Soya Bean excl. Flour-Soya Bean Oil	0.0	0.0	12.5***	--	--
Cotton seed	Cotton Seed-Cotton Seed Oil	0.0	0.0	12.5***	--	--

* The preference margin is for least developed and ACP African countries. No GSP preference is extended on this stage of the processing chain.

** The preference margin is only provided ACP African countries.

***African ACP and least developed have a zero preference rate. GSP receiving countries have a non-zero preferential tariff.

stages of some goods as high as 10 percent. Also, for some of the intermediate stage metal products the country coverage is even more limited as preferences are only extended to Lome Convention countries.¹² In short, there are opportunities for OECD countries to improve market access conditions for some processed commodities and one way to do this would be to extend existing preferences. However, Table 5 indicates that a more extensive analysis of the behavior of post-Uruguay Round MFN and preferential tariffs over commodity processing chains would be needed to indicate where the major problems are occurring.

C. The Influence of the Uruguay Round on Tariffs

The previous discussion analyzed the importance of OECD tariff barriers prior to the Uruguay Round. How will the situation change as a result of the trade negotiations? Overall, the Round reduced industrial countries tariffs by about 40 percent on average. What magnitude of cuts occurred on products of export interest to Africa? Table 6 provides relevant information by showing (columns 3 and 4) the average pre-Uruguay Round MFN and "applied" tariffs on all non-oil products exported by each African country to the European Union, Japan and United States. The latter duties are the average of the preferential or MFN tariff actually applied to African exports. Similarly, columns 5 and 6 indicate the corresponding duties that will be in place after the final Uruguay Round tariff cuts are fully implemented. Finally, the right-most column in the table shows the reduction in each African countries preference margin (in percentage points) that will occur as a result of the Uruguay Round MFN tariff cuts. It should be noted that both the MFN and applied rates shown in the table incorporate estimates of the "tariffed" levels of protection associated with the Uruguay Round elimination of agricultural nontariff barriers (see Chapter 4, Section D for information on this point).

An example can help illustrate the proper interpretation of the information in Table 6. As indicated, the

¹²There is a further potentially important issue involving preferences that goes beyond the scope of the present study. The objective of preference schemes such as the GSP was to stimulate the industrialization and growth of the beneficiary countries. However, ceilings or quotas may be placed on some products exported from individual countries and, once these are surpassed, further imports are taxed at the prevailing MFN rate. It has been alleged that some countries ceilings have been set below the level of minimum efficient plant size (particularly in the area of minerals and metals) with the result that the incentives for new investment are greatly diminished. Analyses to determine the extent to which preference quotas are set below minimum efficient plant size would be useful for improving the impact of preference programs.

average pre-Uruguay Round MFN tariff on products exported by Kenya was 4.88 percent. However, once preferences are accounted for the average applied tariff actually facing Kenyan exports was slightly more than 0.11 percent -- which implies an average preference margin of 4.76 percentage points. However, as a result of the Uruguay Round, MFN tariffs on the products exported by Kenya will be reduced to 2.88 percent -- which means a 1.99 percentage point reduction in Kenya's margin of preference. In the case of Cape Verde and Somalia even larger reductions occur as preference margins fall by 10.3 and 12.8 percentage points respectively. A 12 percentage point reduction in MFN tariffs for two line items (Rock Lobster and Cigars) accounts for Cape Verde's results while Somalia's preference reduction is almost entirely due to a reduced tariff on bananas. Appendix Tables A2-1 through A2-49 present similar, but more detailed information for broad groups of products (separate tabulations are shown for the EU, Japan and United States) exported by each African country along with full information as to the basis for these computations.

For the 44 African countries combined pre-Uruguay Round MFN tariffs averaged 4.56 percent while the "applied" duties (which account for preferences) were some 4.25 percentage points lower. As a result of the Uruguay Round the average MFN tariff on products exported by Africa was reduced to 2.68 percent -- which resulted in an average 1.78 percentage point reduction in preference margins. Aside from Somalia, Cape Verde, Rwanda and Uganda the preference margin reductions were modest (all under three percentage points).

A key question concerns the magnitude of the export earning losses Sub-Saharan Africa will experience as a result of the Uruguay Round erosion of their trade preferences. A recent World Bank study (Yeats 1994) provides relevant information. Specifically, this investigation determined that African export losses would total about one-quarter billion dollars *if Africa's trade preferences were fully eroded* (i.e., MFN tariffs were reduced to the level of tariff preferences). The Cote d'Ivoire accounted for about one-fourth of the African losses (\$57 million of this country's annual exports would be displaced) with Mauritius and Kenya each recording declines of about \$25 million. However, these figures overstate the actual Uruguay Round effects since preferences were reduced, but not fully eliminated. Based on what occurred it appears that actual African trade losses would be in the range of \$100 million annually in the EU, Japan and United States which represents approximately one-half of one percent of total annual exports.

Table 6. European Union, Japanese and United States Uruguay Round Tariff Concessions on Non-Oil Products of Export Interest to Africa.

Exporter	Value (\$ million)	Tariff Rate (%) ^a				
		Applied 1992	MFN 1992	Applied 1999	MFN 1999	Preference Margin Reduction
Angola	246.9	0.01	2.48	0.01	1.41	1.06
Benin	36.5	0.10	1.80	0.10	1.27	0.53
Burundi	137.0	0.00	2.41	0.00	0.14	2.37
Burkina Faso	97.4	0.01	1.08	0.01	0.80	0.29
Cameroon	890.9	0.00	3.81	0.00	1.62	2.19
Cape Verde	5.7	0.00	19.60	0.00	9.30	10.30
Central African Rep.	98.5	0.00	1.63	0.00	0.39	1.24
Chad	55.8	0.01	0.39	0.00	0.25	0.14
Comoros	20.9	0.00	3.45	0.00	2.07	1.38
Congo	231.7	0.00	0.92	0.00	0.49	0.43
Cote d' Ivoire	2,062.4	0.01	5.51	0.00	2.94	2.56
Djibouti	13.2	0.18	1.13	0.14	0.89	0.20
Ethiopia	293.3	0.02	2.49	0.02	0.73	1.77
Equatorial Guinea	48.4	0.00	2.90	0.00	1.26	1.64
Gabon	624.7	0.00	1.11	0.00	0.71	0.40
Gambia	90.3	0.59	7.05	0.37	4.21	2.62
Ghana	764.4	0.08	2.99	0.06	2.15	0.82
Guinea	419.4	0.01	0.77	0.01	0.04	0.32
Guinea Bissau	7.6	0.07	6.52	0.05	4.59	1.91
Kenya	667.1	0.11	4.88	0.10	2.88	1.99
Liberia	935.6	0.00	0.09	0.00	0.02	0.07
Madagascar	268.8	0.31	4.98	0.01	2.45	2.34
Malawi	197.5	0.39	9.05	0.34	7.14	1.87
Mali	74.9	0.01	0.92	0.01	0.42	0.50
Mauritania	402.6	0.24	6.47	0.16	3.90	2.49
Mauritius	857.9	3.94	13.29	3.59	11.70	1.25
Mozambique	113.1	0.60	8.02	0.23	5.13	2.52
Niger	70.5	0.07	2.79	0.06	1.94	0.84
Nigeria	676.2	0.07	2.36	0.06	0.83	1.52
Reunion	157.9	4.09	4.29	2.09	2.34	0.05

Table 6. Continued

Exporter	Value (\$ million)	Tariff Rate (%) ^a				
		Applied 1992	MFN 1992	Applied 1999	MFN 1999	Preference Margin Reduction
Rwanda	127.0	0.01	3.60	0.00	0.22	3.57
Sao Tome & Principe	12.0	0.00	6.45	0.00	3.85	2.60
Senegal	466.9	0.13	10.40	0.10	8.58	1.79
Seychelles	121.8	0.00	21.24	0.00	20.78	0.45
Sierra Leone	190.2	0.33	1.87	0.32	1.12	0.75
Somalia	52.4	0.00	14.29	0.00	1.61	12.68
South Africa, Republic of	17,358.8	0.93	1.01	0.53	0.58	0.02
Sudan	311.6	0.00	0.85	0.00	0.55	0.30
Togo	145.7	0.00	1.68	0.00	0.58	1.10
Uganda	284.4	0.00	3.03	0.00	0.02	3.02
Tanzania, United Republic	258.9	0.11	3.23	0.09	1.33	1.88
Zaire	1,331.6	0.00	0.74	0.00	0.14	0.60
Zambia	751.1	0.00	0.29	0.00	0.22	0.07
Zimbabwe	930.7	0.88	6.58	0.61	4.50	1.81
ALL ABOVE COUNTRIES		0.31	4.56	0.21	2.68	1.78

^aThe averages shown below include Uruguay Round "tariffed" rates of protection for agricultural nontariff barriers. The 1992 applied tariffs are the average of the GSP, Lome, Least Developed or MFN rates actually applied to the African country's exports. The 1999 applied rates reflect the Uruguay Round reductions in any MFN tariffs that may have faced African exporters. The 1992 and 1999 MFN rates show the average Most-Favored-Nation tariff applied to the products exported by each African country. The preference margin reduction shows the decline in the average preference margin each country received due to the Uruguay Round MFN tariff cuts.

D. Regionalism and African Exports

A point that is often not given adequate recognition is the extent to which regional trade arrangements have spread among OECD countries, what an important position they have achieved in global trade, and how they influence developing countries' export prospects. As an example, under the preferences members give each other the intra-trade of EFTA or EU countries is duty free behind the European Union's common external tariff or EFTA members national MFN tariffs. Similarly, trade between EFTA and the EU member states is mostly duty free under a special protocol. The Canadian-American Free Trade Arrangement (CAFTA) provides the United States and Canada with duty free access to each others markets for most goods, while the intra-trade of Australia and New Zealand is also duty free under a free trade arrangement. The combined size of these agreements is enormous. In a recent tabulation, Braga and Yeats (1994) concluded that European FTAs covered more than one-third of world trade in manufactures, while all such OECD arrangements covered almost 50 percent of world trade in these items.

Although the point has largely gone unrecognized, the spread of these OECD regional trade arrangements has markedly altered the relative conditions of market access that OECD members extend to developing countries. Specifically, the GATT Decision of the Contracting Parties of 28 November 1979 on Differential and More Favorable Treatment, Reciprocity and Fuller Participation of Developing Countries (GATT 1979) makes developing countries eligible under the Generalized System of Preferences for lower rates of duty on their exports to developed countries than apply to similar exports from other developed countries. This treatment was extended in recognition of the fact that many developing countries often could not compete, on equal terms, with OECD members and needed an edge to accelerate their industrialization and growth.¹³

The preferences that OECD countries extend to each other under the regional arrangements have markedly affected the competitive position of African and other developing countries and are implemented in a manner that runs counter to the GATT 1979 Agreement. Formerly, OECD preferences under the GSP or Lome Convention provided developing countries with a competitive advantage in the products covered by these schemes. This advantage has been neutralized by the intra-OECD arrangements. Worse yet, in products not covered by schemes

¹³See Hindley (1987) for a discussion of the rationale for, and procedures through which, special and differential treatment could be extended to developing countries.

like the GSP or Lome, African and other developing countries are being placed at a steadily increasing competitive disadvantage as the intra-OECD arrangements widen (i.e., incorporate more countries). That is, on many items where either present or potential future competition with OECD FTA members occurs, exports from Africa and other developing countries will face MFN tariffs (and whatever nontariff restrictions are in place) while the intra-trade of industrial countries' is (will be) unrestrained. The importance of this point is reflected in the fact that about one-half (by value) of developing countries exports of products in MFN dutiable product lines did not receive preferences. Among these items, developing countries exports of agricultural products, foodstuffs, footwear, textiles and clothing will be placed at an important competitive disadvantage due to the high levels of MFN protection for these goods in some OECD markets.

Aside from direct trade losses, the "minilateral" OECD arrangements have other adverse implications for Africa. African countries exports are often highly concentrated in a relatively few product lines (see Table 3) and an important objective is to expand their export base. However, the number of potentially new product lines that Africa might be able to compete successfully has almost certainly been reduced by the "special and differential" treatment OECD countries provide each other under regional agreements. Although relatively few attempts have been made, thus far, to quantify the magnitude of these losses, the evidence that exists suggests they may be large and growing (World Bank, 1994, Chapter 5).

E. Tariffs: The Potential for Positive OECD Policy Action

Although Africa's disappointing overall trade performance cannot be attributed to OECD countries' tariff protection (tariffs facing Africa are far lower than those that faced the Asian NICs at the start of their sustained export oriented industrialization drive) there are several initiatives industrial countries could adopt that should have positive effects. These include a number of proposals based on the Cartagena Commitment which was adopted at the conclusion of UNCTAD VIII (see Box 2). Basically, the agreement re-affirmed developed countries' commitment to provide "special and differential" treatment for developing countries and to incorporate further improvements in their established preferences schemes (see Hindley 1987 for a discussion of the rationale for, and

Box 2
An Extract from the Cartagena Commitment

During the eighth general session of the United Nations Conference on Trade and Development held in Cartagena in 1992 considerable discussion was devoted to ways of improving the trade prospects of developing countries -- particularly the Least Developed and African countries. At the close of the conference delegates adopted the "Cartagena Commitment" which included a number of planks indicating how existing GSP schemes might be improved to better serve the needs of developing countries.

...

134. The Conference notes that many developing country exports have benefited from GSP treatment, and encourages preference-giving countries to continue to improve and renew the schemes and to extend their operation periods in order to avoid the uncertainty of preferences, bearing in mind the autonomous nature of the schemes.

135. The Conference recommends that preference-giving countries comply with the multilaterally agreed principles of the GSP. Preference-giving countries should consider appropriate adjustment in country coverage. The Conference recognizes that a substantial of product coverage to include hitherto excluded products of current and potential export interest to developing countries would constitute a major improvement in the effectiveness of the GSP and calls upon preference-giving countries to consider, if possible, comprehensive product coverage, especially in the context of the review of the schemes under way in many preference-giving countries. Limitations and restrictions on preferential imports, as well as withdrawals of preferential benefits, should be minimized, and the rules of origin should be simplified and harmonized, where possible, so as to impart stability, transparency and greater predictability to the schemes and to reduce their complexity.

136. The Conference expresses concern over the incidence of non-tariff measures on the benefits deriving from GSP schemes, and preference-giving countries are urged to make efforts to reduce or eliminate such barriers linked to the schemes.

137. The Conference calls upon preference-giving countries to implement fully the relevant provisions of the Paras Declaration and Program of Action for the Least Developed Countries for the 1990s in respect of GSP measures in favor of LDCs and urges that special consideration be given to products of export interest to them, in particular to the provision of duty-free access.

138. The Conference urges UNDP and potential donor countries in a position to do so, to increase their contributions to the UNCTAD technical assistance program on GSP in order to allow developing countries to benefit fully from the system. Those preference receiving countries and their exporters which have not yet fully taken advantage of the GSP should participate actively in these technical assistance activities.

139. The Conference requests the Special Committee on Preferences to examine the scope and possible modalities for extending preferential treatment to developing countries with respect to goods, in accordance with the principles and objectives underlying the GSP.

140. With MFN rates expected to be brought down pending a successful conclusion on the Uruguay Round, preference-giving countries should consider, where possible, increasing preferential margins and duty-free treatment offered under existing preferential schemes.

...

ways of providing such treatment). The following proposals for OECD policy actions are in the spirit of the commitment.

- Labor intensive products like textiles, clothing and footwear played a key role in the early stages of the newly industrialized countries transformation, and have a similar potential for Africa. In cases where they are now excluded (as in the case of the United States) they should be incorporated into established schemes -- particularly so since, in these cases, OECD regional arrangements actually discriminate against African countries.

- In the early 1970s, industrial countries adopted Generalized System of Preference programs in recognition of the fact that "special and differential" (favorable) treatment was needed to assist developing countries to industrialize. However, under the spreading OECD regional arrangements industrial countries extend such treatment to each other and actually *discriminate against* African and other developing countries. Policy initiatives are needed to, at least, place African and other developing countries on an equal basis with OECD members in these arrangements.

- Since African exports are normally highly concentrated in primary commodities, there is a strong interest in the contribution that natural resource based industrialization strategies could make toward their industrialization and growth. Where further commodity processing appears suitable for developing countries (i.e., where labor intensive production processes are involved) OECD preferences should be extended to processed product stages which now face MFN tariffs. European preferences for these items should be extended evenly to all countries and not differentiate between Lome Convention and GSP receiving countries¹⁴.

- An accelerated phase-in of Uruguay Round tariff cuts could be adopted by OECD countries.

- The WTO and UNCTAD have argued that the importance of preferences as a vehicle for stimulating industrialization and new investment is greatly reduced by the uncertainty associated with these schemes (see Box 2). Countries may be graduated out entirely, or excluded from specific products on the basis of "competitive need" criteria. Also, the product coverage of these schemes may be altered on short notice. Incorporation of a longer time horizon in the plans, with countries and products "locked in" could have important positive effects.

- Ceilings and quotas should be eliminated from developing country preference schemes, at least to be made consistent with intra-OECD preferences. Ceilings considerably reduce the potential worth of the GSP to developing countries since, aside from their direct trade effects, they also introduce considerable uncertainty in the system (i.e., exporters may not know whether a shipment will qualify for GSP treatment until its arrival in the import market). It is also been alleged that ceilings for some products are sometimes set below minimum efficient plant size. This negates the intended trade and investment increasing incentives of the preferences.

- Until the above objectives are fully accomplished, improved statistical information is required on constraints that Africa and other developing countries encounter in attempting to utilize preferences schemes. Details are needed on the extent to which quotas or ceilings are exceeded (with the result that additional African exports are taxed at the prevailing MFN rate) and the extent to which exports are disqualified due to existing rules

¹⁴According to Biggs et. al. (1996) the "originating requirements" under the 4th Lome Convention are so restrictive that some African exports covered by this agreement are unable to take advantage of the preferences available. When an African exporter is unable to meet the originating requirements under Lome, the full tariff must be paid on the item entering the EU (for example, a man's shirt), while an exporter of the same item from (say) India or China only has to pay 85 percent of the tariff under the Generalized System of Preferences. The GSP does not cover African exporters of these products because they are included within Lome. Modifications to remove inconsistencies between the two EU preference systems should benefit African countries.

of origin. Such information is central to any proper assessment of the economic impact of preferences on the receiving countries and to initiatives for improving these programs.

IV. OECD Nontariff Barriers Facing Africa

Although the previous analysis showed Africa's generally poor export performance could not be attributed to OECD tariffs, the possibility still exists that protectionism had an influence. Aside from import duties, OECD countries employ nontariff restrictions like quotas, variable levies, "voluntary" export restraints, and restrictive licensing arrangements to control imports. Any assessment of the influence of protectionism facing Africa must also examine the potential influence of these measures. Furthermore, since the Uruguay Round made major changes in the ability of GATT members to utilize many of these restrictions one should analyze the incidence of NTBs facing Africa both before, and after, the conclusion of the negotiations.

A. Pre-Uruguay Round NTBs Facing Africa

What does available information indicate concerning the nature and extent of OECD countries' nontariff barriers on Africa and other groups of countries? Utilizing World Bank-UNCTAD records, Table 7 shows the share of OECD imports from: (i) other OECD countries, (ii) developing countries, and (iii) all sub-Saharan African countries that encounter NTBs.¹⁵ The latter is reported both with the Republic of South Africa included and excluded due to the relatively high share of manufactures in South African exports, and the fact that this country faced sanctions as a result of its apartheid policies.

As Table 7 shows developed countries' nontariff measures affect a notably higher share of imports from non-OECD countries than they do for OECD intra-trade. Approximately 17 percent of developing countries' exports (excluding petroleum) encounter NTBs, while the corresponding share for OECD intra-trade is under 10 percent.

An even greater difference in NTB coverage ratios exists for several product groups. Approximately 53 percent

¹⁵Laird and Yeats (1990, Chapter 4) describe how this inventory of nontariff measures was constructed and discuss its utility for research and policy studies. In particular, they note that trade coverage ratios are a rough approximation of the importance of NTBs in that they provide no indication of the restrictiveness of the measures. Low coverage ratios, for example, could be associated with highly restrictive NTBs. Laird and Yeats also provide extensive empirical information on the results of NTB inventory studies for industrial countries. UNCTAD (1993, p. 37) tabulates the annual share of developing countries' exports that encountered nontariff measures over the last decade -- it rose from 16.2 percent in 1981 to 18.3 percent in 1991.

Table 7. Nontariff Measure Coverage Ratios for OECD Imports from Developed, Developing and Sub-Saharan African Countries

Product Group (SITC)	1992 Imports (\$million)				Nontariff Barrier Coverage Ratios			
	Developed Countries	Developing Countries	Sub-Saharan Africa	SSA excluding South Africa	Developed Countries	Developing Countries	Sub-Saharan Africa	SSA excluding South Africa
ALL NON-FUEL ITEMS (0 TO 9-3)	1,900,481	540,783	25,137	15,647	9.7	16.6	10.8	10.4
All Foods (0+1+22+4)	190,602	79,053	8,022	6,223	24.6	17.1	23.4	18.6
Food and Live Animals (0)	152,772	69,241	7,044	5,327	28.1	18.2	24.5	19.5
Oil Seeds and Nuts (22)	5,849	2,509	72	59	1.3	3.6	6.3	2.2
Animal & Vegetable Oils (4)	5,046	2,841	171	169	5.7	5.7	0.1	0.1
Agricultural Materials (2-22-27-28)	53,386	20,303	2,719	2,109	1.3	1.3	0.3	0.2
Ores and Metals (27+28+67+68)	116,438	42,227	7,521	2,810	13.6	10.1	5.7	2.6
Ferrous Metals (67)	55,326	11,294	1,097	171	38.2	35.9	38.6	44.4
Non-Ferrous Metals (68)	37,753	15,192	3,677	1,465	0.0	0.0	0.0	0.0
Mineral Fuels (3)	86,298	164,851	19,654	18,012	21.5	16.4	17.4	16.8
All Manufactures (5 to 8 - 68)	1,499,800	383,871	6,524	6,369	8.5	18.8	5.6	6.5
Chemicals (5)	216,755	22,039	769	320	6.0	3.9	0.2	0.0
Other Manufactures (6 to 8-67-68)	1,283,045	361,832	5,755	3,953	8.8	19.9	6.4	9.7
Leather (61)	5,004	3,749	237	134	3.0	1.2	0.0	0.0
Textile Yarn & Fabric (65)	49,545	19,485	275	173	4.4	52.5	18.7	34.1
Clothing (84)	43,250	79,659	1,019	845	3.4	62.5	44.8	47.5
Footwear (85)	12,142	15,864	17	7	12.2	32.0	1.3	2.6
ALL ITEMS (0 to 9)	1,986,779	705,634	44,791	33,659	10.2	16.6	13.1	13.1

Note: The following measures were included in the computation of the nontariff barrier coverage ratio: tariff quotas; increased duties, safeguard duties, retaliatory duties and customs surcharges; variable levies and flexible import fees; non-automatic licensing and discretionary licensing; quotas and prohibitions; voluntary export restraints, MFA quotas and other restraints including textile restraint agreements, orderly marketing arrangements; other quantitative restrictions; other restrictions imposed under the Multifiber Arrangement; minimum, reference or other import price controls; voluntary export price restraints; state monopoly of imports; and local content regulations.

Source: World Bank-UNCTAD SMART Data Base. The statistics in this and the tables that follow reflect nontariff barriers which are applied in all OECD markets with the exception of Iceland and Turkey. Developed countries are defined as all OECD members less Turkey while developing countries are all countries less the OECD plus Turkey. The countries included in the sub-Saharan group are listed in Table 1.

of developing countries' textile exports face restrictions while the coverage ratio for clothing is about 63 percent.

In contrast, under 5 percent of OECD intra-trade in these goods encounter restrictions (mainly goods shipped from Japan). The Multifiber Arrangement, special textile quotas, bilateral quotas, and voluntary export restraints account for these major differences. Nontariff barrier coverage ratios for developing countries' footwear exports are about 20 points higher than on OECD intra-trade of these goods. "Voluntary" export restraints imposed by the EU and EFTA largely account for these differentials.¹⁶

Table 7 shows OECD coverage ratios are not always higher for developing countries' exports. Twenty five percent of OECD intra-trade in foods encounter NTBs compared to the 17 percent coverage ratio for shipments of these goods from developing countries. The difference is due to the fact that tropical food products like tea, coffee, and cocoa -- which account for approximately 15 percent of all developing countries' food exports - face relatively few OECD nontariff barriers. Most agricultural NTBs are applied to temperate zone products (particularly grains and dairy products) which are mainly exported by other OECD and some developing countries, like Argentina, outside the tropics. Sugar, which is produced in temperate zone countries (from beets) as well as in the tropics (from cane) is an exception. Some African and other developing country oilseeds and vegetable oils, which can be substitutes for temperate zone products, encounter NTBs in the form of European variable import levies.

Table 7 indicates the profile of nontariff protection against sub-Saharan African exports differs somewhat from other developing countries. First, only about 11 percent of African non-fuel exports face NTBs as opposed to the 17 percent average for all developing countries. The lower NTB coverage ratio is largely accounted for by the fact that most African countries' textile and clothing products are not affected by MFA restrictions. Mauritius is a noteworthy exception with \$116 million, or 88 percent of its textile and clothing exports to the United States, covered by quotas. Only 19 percent of African textile exports face NTBs, as opposed to 53 percent for all

¹⁶Evidence shows that textile and footwear restrictions have major distorting effects on the exports of developing countries who face the measures. For example, the US International Trade Commission estimates of tariff plus NTB protection for 54 broad classes of textile and clothing products. The estimates range to over 100 percent with the nontariff barrier component of total protection generally being far higher than that of tariffs. It is generally held that levels of nontariff protection against textiles and clothing in Europe are of a similar magnitude to that of the United States,

developing countries combined, while the African coverage ratio for clothing is about 18 points below the 63 percent developing country average. This pattern is reversed, however, for several food and feed product groups where African countries encounter a higher incidence of NTBs than all developing countries. If coffee were excluded from the tabulations the African food trade coverage ratios would be considerably lower than those for developed and developing countries as a group. Coffee exports are subject to quantitative controls (voluntary export restraints) imposed under the International Coffee Agreement. Special taxes are also applied to coffee imports in several European markets.

Analysis of NTB protection in individual OECD markets indicates that EU trade barriers are directed against African and other developing countries' exports with an above average frequency. While Table 8 shows that only 2 to 3 percent of sub-Saharan African exports to EFTA, Japan and the United States encounter nontariff measures the coverage ratio for the European Union is about *ten times higher* (21.2 percent). In contrast, less than 9 percent of EU imports from the OECD face nontariff measures. Six African countries have more than one-quarter of their total exports to the European Union covered by NTBs, with the coverage ratios for Reunion and the Seychelles ranging from 88 to 96 percent. Sugar's importance in Reunion's and several other African countries' exports (sugar faces variable levies in Europe) accounts for the high pre-Uruguay Round ratios while the results for the Seychelles are largely due to EU reference prices for imports of tuna and skipjack.

In the United States the pattern of nontariff protection is the reverse of that for the European Union. Here, less than 2 percent of all African exports face nontariff restrictions, while the NTB coverage ratio for US imports from developed countries is 15 percent. Almost 21 percent of Burkina Faso's exports to the US encounter NTBs - mostly due to global quotas on imports of feathers totalling \$77,000 -- while Mozambique's ratio is 32 percent due to US tariff quotas and variable levies on sugar.

Aside from the Republic of South Africa, nontariff barriers in Japan do not appear to pose much of a problem for Africa. Malawi is an exception as almost all of its exports (which consist solely of tobacco) are required to pass through a regulatory state import agency. Between 16 to 20 percent of Equatorial Guinea and the Comoros exports face Japanese NTBs -- the former's exports (parts of tropical plants) are also required to pass through a state agency while the Comoros exports of whalebone is subject to a global quota. For most other African

Table 8. The Share of African Exports Covered by Nontariff Measures: All OECD Countries and Major Industrial Markets.

Exporter	1992 Value of Exports (\$million)					Share of Exports Covered by NTBs				
	All OECD	EFTA	EU	Japan	USA	All OECD	EFTA	EU	Japan	USA
Angola	3,684	1	1,132	5	2,436	4.7	2.2	14.7	0.0	0.0
Benin	76	1	60	2	10	1.3	7.6	1.5	0.0	0.0
Burkina Faso	53	—	41	5	—	12.3	32.8	13.1	0.0	20.8
Burundi	74	6	22	2	9	0.1	0.4	0.0	0.0	0.0
Cameroon	1,577	8	1,360	13	90	20.8	0.1	26.8	0.0	0.0
Cape Verde	7	—	6	1	—	39.5	0.0	60.8	0.0	0.0
Central African Rep.	102	—	99	—	1	0.1	0.0	0.1	0.0	0.0
Chad	66	1	42	5	—	0.1	0.1	0.1	0.0	0.0
Comoros	28	—	13	—	11	0.6	1.1	0.3	16.2	0.0
Congo	1,440	13	851	2	547	38.5	19.7	4	0.0	0.0
Cote D'Ivoire	2,258	49	1,623	16	206	14.1	2.4	16.1	0.0	3.6
Djibouti	4	1	3	—	—	5.2	46.2	3.2	0.0	0.0
Equatorial Guinea	39	—	37	—	—	0.1	0.0	0.1	20.0	0.0
Ethiopia	160	6	67	44	9	1.8	1.3	3.3	0.0	0.0
Gabon	2,119	31	956	89	984	15.8	0.1	22.6	0.0	0.0
Gambia	183	1	145	36	1	0.5	1.6	0.9	0.0	0.0
Ghana	886	42	442	65	102	0.4	3.7	0.4	0.0	0.0
Guinea	526	29	329	1	125	0.3	4.2	0.4	0.0	0.0
Guinea Bissau	8	—	7	—	—	1.6	0.0	1.7	0.0	0.0
Kenya	837	58	510	22	78	3.5	4.3	3.8	7.6	0.0
Liberia	804	90	642	43	13	0.0	0.0	0.0	0.0	0.0
Madagascar	340	20	188	32	56	7.6	1.1	9.6	0.0	7.9
Malawi	393	20	130	68	64	29.6	13.5	18.2	99.5	13.4
Mali	117	1	95	5	2	0.4	2.4	0.5	0.0	0.0
Mauritania	413	—	241	151	10	1.3	1.6	2.3	0.1	0.0
Mauritius	1,279	23	950	4	147	61.6	43.0	59.9	2.0	79.9
Mozambique	147	4	94	16	21	10.3	5.7	9.1	0.0	31.7
Niger	184	1	172	—	3	0.2	7.2	0.2	0.0	0.2
Nigeria	11,379	510	3,720	2	5,299	14.4	0.1	38.2	0.0	0.1
Reunion	154	—	151	1	—	83.0	8.5	88.8	1.4	0.0
Rwanda	64	—	32	—	5	1.1	0.4	1.2	0.0	0.0
Sao Tome & Principe	5	—	3	—	—	17.2	0.0	18.4	0.0	0.0
Senegal	362	6	317	11	11	19.1	29.4	20.0	0.1	0.4
Seychelles	37	—	34	—	1	91.4	7.1	95.5	0.0	0.0

Table 8. Continued.

Exporter	1992 Value of Exports (\$million)					Share of Exports Covered by NTBs				
	All OECD	EFTA	EU	Japan	USA	All OECD	EFTA	EU	Japan	USA
Sierra Leone	354	3	256	3	65	0.1	7.6	0.1	0.0	0.0
Somalia	19	1	14	--	2	9.0	0.0	9.6	0.0	0.0
South Africa	11,132	525	4,892	1,781	1,878	13.0	5.2	14.9	21.1	0.0
Sudan	149	5	74	29	11	12.4	0.1	17.4	0.0	0.0
Tanzania	266	8	158	33	12	3.8	1.2	5.4	0.1	0.0
Togo	121	8	65	1	7	0.5	0.7	0.5	2.2	0.0
Uganda	162	4	120	4	14	0.0	0.7	0.0	0.0	0.0
Zaire	1,277	17	801	83	259	0.0	0.4	0.0	0.0	0.0
Zambia	630	8	279	249	71	0.7	12.1	0.7	0.0	0.0
Zimbabwe	875	54	418	120	114	20.3	6.5	28.5	4.4	8.5
TOTAL SUB-SAHARAN AFRICA	44,791	1,556	21,592	2,945	12,675	13.1	3.4	19.7	13.2	1.6
<u>Memo Item</u>										
SSA excluding S. Africa	33,659	1,031	16,700	1,164	10,798	13.1	2.5	21.2	3.2	1.9
Developed Countries	1,986,779	186,789	908,622	110,548	317,996	10.2	6.6	8.8	16.5	15.4
Developing Countries	705,634	29,551	204,374	120,426	233,595	16.6	15.1	24.9	4.2	15.4

Note: See the notes to Table 7 for country definitions and a listing of measures that have been included in the computation of the NTB coverage ratios.

Source: Trade statistics from UN COMTRADE records. NTB information from the World Bank-UNCTAD SMART Database.

countries, however, the Japanese NTB coverage ratios are zero, or very low.

Table 9 provides a further perspective on OECD protection facing African exports by showing NTB trade coverage ratios for major product groups, both in total and for individual countries. These tabulations indicate NTBs on most African countries' food exports are considerably more important than those on manufactures (i.e., the coverage ratio for food is 23 percent versus 5.7 percent for manufactures). For some countries the food coverage ratios exceed 80 percent (Djibouti, Mauritius and Reunion) and reach 94 percent for the Seychelles. The importance of this point is highlighted by the fact that numerous studies have estimated that European Union and Japanese NTBs on many food products have ad valorem equivalents of 50 to 200 percent or more (see Laird and Yeats 1991 for a survey of these studies' findings or Table 12 in this report for pre- and post-Uruguay Round estimates).

In contrast to foods and feeds, only about three-tenths of one percent of African agricultural raw material exports encounter NTBs, while the ratio for the ores, minerals and metals group is under 6 percent -- about the same for manufactures. Mauritius and Malawi's coverage ratios for manufactures are exceptions, being 8 or more times the sub-Saharan African average. As previously noted, US textile quotas are a factor responsible for the Mauritius' results -- see Figure 3 for estimated ad valorem equivalents of these MFA restrictions. Import certification regulations are applied to ivory and reptile skin products exported from Malawi. Between 17 to 24 percent of Cameroon, Cote d'Ivoire and Madagascar's manufactures exports encounter NTBs, but aside from these countries the coverage ratios are low. In fact, manufactures exports from 11 of the 44 countries encounter no NTBs, and 56 percent (25 out of 44) of the African countries have less than one percent of their manufactured exports facing nontariff measures.

Table 10 addresses the question of what types of nontariff measures do African exports most frequently encounter. Shown here are total 1992 OECD imports (both including and excluding fuels) from individual African countries and summary statistics showing African group totals. The table also indicates the share of this exchange that face six categories of nontariff measures: (i) all NTBs; (ii) directly price raising measures; (iii) quotas and prohibitions; (iv) "voluntary" export restraints; (v) non-automatic licensing requirements; and (vi) other restrictions. The notes to Table 10 indicate the specific types of measures included in each nontariff barrier group.

Table 9. The NTB Coverage of Major Product Categories of African Exports to OECD Markets.

Exporter	1992 Value of OECD Imports(US\$ millions)					Share of OECD Imports Covered by Nontariff Measures				
	All Goods	Foods and Feeds	Agricultural Materials	Ores and Non-Ferrous Metals	Manufactures	All Goods	Foods and Feeds	Agricultural Materials	Ores, and Non-Ferrous Metals	Manufactures
Angola	3,684	17	1	2	192	4.7	4.9	0.0	0.0	0.0
Benin	76	22	32	--	12	1.3	3.5	0.0	0.0	1.5
Burkina Faso	53	13	35	n.a.	4	12.3	51.1	0.2	6.5	0.5
Burundi	74	65	3	4	2	0.1	0.1	0.0	7.6	0.1
Cameroon	1,577	335	346	84	44	20.8	5.0	0.0	0.3	17.2
Cape Verde	7	6	0.1	--	1	39.5	67.9	0.0	0.0	7.9
Central African Rep.	102	5	19	--	78	0.1	0.0	0.0	4.4	0.1
Chad	66	1	64	--	1	0.1	1.5	0.0	0.0	0.0
Comoros	28	20	--	--	8	0.6	0.0	28.8	0.0	0.6
Congo	1,440	11	122	6	365	38.5	58.5	1.2	0.0	0.1
Cote D'Ivoire	2,258	1,587	364	3	266	14.1	17.9	0.2	0.0	16.7
Djibouti	4	--	1	--	2	5.2	87.0	0.0	5.7	3.1
Equatorial Guinea	39	6	29	2	2	0.1	0.2	0.0	0.0	0.1
Ethiopia	160	92	27	--	40	1.8	1.1	0.0	0.0	7.4
Gabon	2,119	16	189	180	70	15.8	0.6	0.0	0.0	2.8
Gambia	183	49	1	--	133	0.5	0.8	0.0	0.0	0.0
Ghana	886	386	130	266	88	0.4	0.5	0.0	0.0	0.1
Guinea	526	18	5	370	132	0.3	6.2	0.0	0.0	0.0
Guinea Bissau	8	4	2	--	1	1.6	2.3	0.0	2.7	1.8
Kenya	837	591	107	11	111	3.5	4.2	1.7	0.0	0.2
Liberia	804	2	90	41	546	0.0	0.2	0.0	0.0	0.0
Madagascar	340	251	13	25	50	7.6	6.3	0.0	0.0	24.2
Malawi	393	363	10	--	18	29.6	28.0	0.0	28.3	59.3
Mali	117	4	52	--	61	0.4	3.4	0.1	3.8	0.1
Mauritania	413	206	1	201	3	1.3	0.6	0.0	0.0	2.4
Mauritius	1,279	408	6	1	860	61.6	86.5	5.4	0.0	47.2
Mozambique	147	108	21	4	13	10.3	13.2	0.0	0.0	4.4
Niger	184	1	2	1	179	0.2	10.4	1.4	10.3	0.0
Nigeria	11,379	200	111	17	155	14.4	0.3	0.0	13.7	2.1
Reunion	154	147	1	1	6	83.0	89.5	0.0	0.0	2.0
Rwanda	64	50	8	3	2	1.1	1.1	0.0	0.0	2.1
Sao Tome & Principe	5	4	--	--	1	17.2	18.1	0.0	0.0	0.0
Senegal	362	291	17	25	21	19.1	24.6	0.0	0.0	2.8
Seychelles	37	34	--	--	2	91.4	94.3	0.0	8.0	0.6

Table 9. Continued.

Exporter	1992 Value of OECD Imports(US\$ millions)					Share of OECD Imports Covered by Nontariff Measures				
	All Goods	Foods and Feeds	Agricultural Materials	Ores and Non-Ferrous Metals	Manufactures	All Goods	Foods and Feeds	Agricultural Materials	Ores, and Non-Ferrous Metals	Manufactures
Sierra Leone	354	47	1	86	220	0.1	0.3	5.5	0.0	0.0
Somalia	19	16	2	—	1	9.0	11.6	0.0	43.1	0.0
South Africa	11,132	1,799	609	4,711	2,251	13.0	57.1	0.6	8.4	0.4
Sudan	149	39	102	1	6	12.4	31.9	0.0	0.0	0.0
Tanzania	266	153	36	34	40	3.8	5.8	0.0	0.0	5.3
Togo	121	31	14	64	7	0.5	1.6	0.1	0.0	0.2
Uganda	162	143	16	0.3	3	0.0	0.0	0.0	0.0	0.0
Zaire	1,277	80	64	472	395	0.0	0.0	0.0	0.0	0.1
Zambia	630	16	6	579	28	0.7	29.8	0.0	0.0	0.6
Zimbabwe	875	386	61	324	102	20.3	30.3	0.1	19.4	8.0
SSA	44,791	8,022	2,719	7,521	6,524	13.1	23.4	0.3	5.7	5.6
SSA excl S.Africa	33,412	7,822	2,608	7,503	6,369	13.1	18.6	0.2	2.6	6.5
Developing Countries	705,634	79,053	20,303	42,227	383,871	16.6	17.1	1.3	10.1	18.8
Developed Countries	1,986,779	190,602	53,386	116,438	1,499,800	10.2	24.6	1.3	13.6	8.5

Source: Trade data from United Nations COMTRADE files. Nontariff barrier information from World Bank-UNCTAD SMART Data Base. See the notes to Table 2 for the components of the product groups shown in this table defined in terms of the SITC (revision 1) classification system. The notes to Table 3 indicate which nontariff measures have been employed for the computation of the trade coverage ratios.

Figure 3: The Estimated Total Effect of Tariff and Nontariff Protection for Textiles and Clothing in the United States

Note: MMF means manmade fiber; WGI means women's, girls', and infants'; MB means men's and boys'.

Source: USITC 1989.

Overall, quantitative restrictions are the most important type of barrier facing African exports, although the relative importance of these measures changes when fuels are excluded from the tabulations (Box 3 summarizes the nontariff barriers which are applied to fuel imports in major OECD markets). QRs affect approximately 8 percent of African exports, followed by price raising restrictions that cover 4 percent of total trade.¹⁷ When energy products are excluded, however, the importance of price raising measures, which are applied to many agricultural products, is more than double that of quantitative restrictions. Voluntary export restraints (including MFA restrictions on Africa) are marginal -- they affect only about four-tenths of a percent of SSA exports and are only applied to shipments from Mauritius and, to a lesser extent, countries like Kenya and Nigeria. The application of MFA restrictions to Kenya's exports in the early 1990s had especially negative implications for Africa since they demonstrated that OECD countries would not hesitate to "freeze" the further expansion of an export oriented textile and clothing industry that was in a very early stage of development.

B. The Achievements of the Uruguay Round

The foregoing discussion established two main points. First, before the Uruguay Round some African countries faced important OECD nontariff barriers, although others exports were largely unaffected. Second, these measures are applied more often against developing countries than against other countries' exports. This situation will change markedly as a result of the Uruguay Round's achievements in the areas of agriculture, textiles and clothing, and safeguards. While the Round also achieved an agreement on the elimination of "voluntary" export restraints these measures are only of marginal importance to a few African countries' exports.

¹⁷In some cases, the sum of the coverage ratios for the six different types of measures may exceed the total shown for all NTBs. This is due to the multiple application or "stacking" of more than one type of nontariff barrier on a single product. For example, the United States applies flexible import charges (variable levies) to sugar imports and also subjects this trade to a tariff quota.

Table 10. The Relative Importance of Different Types of OECD Nontariff Measures Facing African Exports.

					Share of OECD Imports Facing Nontariff Measures									
	1992 OECD Imports (\$million)		All Nontariff Measures		Price Raising Measures		Quotas and Prohibitions		VERs		Non-Automatic Licensing		Other Measures	
Exporter	Total	Non-Fuel	Total	Non-Fuel	Total	Non-Fuel	Total	Non-Fuel	Total	Non-Fuel	Total	Non-Fuel	Total	Non-Fuel
Angola	3,684	219	4.7	1.2	0.0	0.3	4.7	1.2	0.0	0.0	0.0	0.0	0.0	0.0
Benin	76	66	1.3	1.5	0.9	1.1	0.3	0.4	0.0	0.0	0.0	0.0	0.0	0.0
Burkina Faso	53	53	12.3	12.3	0.4	0.4	12.2	12.2	0.0	0.0	0.0	0.0	0.1	0.1
Burundi	74	74	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Cameroon	1,577	814	20.8	3.7	0.0	0.1	20.8	3.7	0.0	0.0	0.0	0.0	0.0	0.0
Cape Verde	7	7	39.5	39.5	15.1	15.2	24.4	24.5	0.0	0.0	0.0	0.0	0.0	0.0
Central African Rep.	102	102	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Chad	66	66	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Comoros	28	28	0.6	0.6	0.0	0.0	0.6	0.6	0.0	0.0	0.0	0.0	0.0	0.0
Congo	1,440	508	38.5	3.8	1.4	3.1	37.1	0.6	0.0	0.0	0.0	0.0	0.0	0.0
Cote D'Ivoire	2,258	2,223	14.1	14.4	2.6	2.7	11.4	11.7	0.0	0.0	0.0	0.0	0.0	0.0
Djibouti	4	3	5.2	5.2	2.8	2.8	2.4	2.4	0.0	0.0	0.0	0.0	0.0	0.0
Equatorial Guinea	39	39	0.1	0.1	0.0	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0
Ethiopia	160	160	1.8	1.8	0.3	0.3	1.5	1.5	0.0	0.0	0.0	0.0	0.0	0.0
Gabon	2,119	458	15.8	1.5	0.0	0.0	15.8	1.5	0.0	0.0	0.0	0.0	0.0	0.0
Gambia	183	183	0.5	0.5	0.5	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Ghana	886	872	0.4	0.2	0.2	0.2	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Guinea	526	526	0.3	0.3	0.1	0.1	0.2	0.2	0.0	0.0	0.0	0.0	0.0	0.0
Guinea Bissau	8	8	1.6	1.6	0.2	0.2	1.5	1.5	0.0	0.0	0.0	0.0	0.0	0.0
Kenya	837	833	3.5	3.5	1.3	1.3	2.2	2.2	0.0	0.0	0.0	0.0	0.1	0.1
Liberia	804	720	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Madagascar	340	340	7.6	7.6	4.7	4.7	2.9	2.9	0.0	0.0	0.0	0.0	0.0	0.0
Malawi	393	393	29.6	29.6	9.0	9.0	20.6	20.6	0.0	0.0	0.0	0.0	0.0	0.0
Mali	117	117	0.4	0.4	0.1	0.1	0.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0
Mauritania	413	413	1.3	0.3	0.2	0.3	1.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0
Mauritius	1,279	1,279	61.6	61.7	32.5	32.5	16.6	16.6	13.1	13.1	0.0	0.0	0.1	0.1
Mozambique	147	147	10.3	10.3	9.1	9.1	1.2	1.2	0.0	0.0	0.0	0.0	0.0	0.0
Niger	184	184	0.2	0.2	0.2	0.2	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0
Nigeria	11,379	497	14.4	1.0	0.0	0.4	14.3	0.0	0.0	0.5	0.0	0.0	0.0	0.0
Reunion	154	154	83.0	83.0	81.2	81.2	1.8	1.8	0.0	0.0	0.0	0.0	0.0	0.0
Rwanda	64	64	1.1	1.1	0.0	0.0	1.1	1.1	0.0	0.0	0.0	0.0	0.0	0.0
Sao Tome & Principe	5	5	17.2	17.5	17.2	17.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Senegal	362	357	19.1	19.1	5.8	5.8	13.3	13.3	0.0	0.0	0.0	0.0	0.0	0.0
Seychelles	37	37	91.4	91.4	83.0	83.0	8.3	8.3	0.0	0.0	0.0	0.0	0.0	0.0

Table 10. Continued

					Share of OECD Imports Facing Nontariff Measures									
Exporter	1992 OECD Imports (\$million)		All Nontariff Measures		Price Raising Measures		Quotas and Prohibitions		VERs		Non-Automatic Licensing		Other Measures	
	Total	Non-Fuel	Total	Non-Fuel	Total	Non-Fuel	Total	Non-Fuel	Total	Non-Fuel	Total	Non-Fuel	Total	Non-Fuel
Sierra Leone	354	354	0.1	0.1	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Somalia	19	19	9.0	9.0	4.1	4.1	5.0	5.0	0.0	0.0	0.0	0.0	0.0	0.0
South Africa	11,132	9,490	13.0	11.5	9.4	10.6	3.9	1.3	0.0	0.0	0.0	0.0	0.2	0.2
Sudan	149	149	12.4	12.4	12.3	12.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Tanzania	266	266	3.8	4.1	3.1	3.4	0.7	0.8	0.0	0.0	0.0	0.0	0.0	0.0
Togo	121	118	0.5	0.5	0.2	0.2	0.2	0.2	0.0	0.0	0.0	0.0	0.0	0.0
Uganda	162	162	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zaire	1,277	1,126	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zambia	630	630	0.7	0.7	0.3	0.3	0.4	0.4	0.0	0.0	0.0	0.0	0.0	0.0
Zimbabwe	875	875	20.3	20.5	18.7	18.9	2.3	2.3	0.0	0.0	0.0	0.0	0.0	0.0
SSA	44,791	25,137	13.1	10.8	4.9	7.5	8.0	3.0	0.3	0.5	0.0	0.0	0.1	0.1
<u>Memo Item</u>														
SSA excl S.Africa	33,659	15,647	13.1	10.4	3.5	6.0	9.3	3.8	0.4	0.7	0.0	0.0	0.0	0.0
Developing Countries	705,634	540,783	16.6	16.6	3.3	3.6	4.8	2.0	9.6	12.5	0.0	0.0	0.1	0.1
Developed Countries	1,986,779	1,900,481	10.2	9.7	2.6	2.4	2.9	2.3	5.0	5.2	0.0	0.0	0.3	0.3

Note: For a listing of all measures that were classified as nontariff barriers see the notes to Table 3. The classification used for the different types of nontariff barriers is as follows:

- (i). Price raising measures include tariff quotas, increased duties, safeguard duties, retaliatory duties, customs surcharges, variable levies and flexible import fees, import price controls including reference and minimum import prices, and "voluntary" export price restraints.
- (ii). Quotas and prohibitions include non-automatic and discretionary licensing requirements, bilateral and global quotas, seasonal quotas, and state monopoly of imports.
- (iii). "Voluntary" export restraints include orderly marketing arrangements, all restrictions relating to the Multifiber Arrangement, other textile export restraint agreements and quotas.
- (iv). Nonautomatic licensing includes import permit requirements, imports restricted to select purchasers, permit dependant on the purchase of local goods, and other discretionary licensing schemes.
- (v). Other entry formalities include prohibitions for noncommercial purposes, miscellaneous regulations including import certification requirements, and local content import requirements.

Source: Trade statistics from United Nations COMTRADE records. Nontariff barrier information from the UNCTAD-World Bank SMART Data Base.

Box 3
Nontariff Barriers Applied to OECD Energy Imports.

The previous analysis documented two points relating to OECD nontariff barriers on energy imports. First, the NTB coverage ratios for these products (17.4 percent) is approximately 7 percentage points higher than that for all non-fuel goods imported from Africa. Second the OECD restrictions often take the form of price raising measures, although energy products are also subject to quotas and special import authorization requirements (quotas in Japan are particularly important). A third point is that NTBs on energy imports were virtually unaffected by the Uruguay Round. As a result, in the post-Uruguay environment this sector will be one of the more heavily NTB ridden of all product groups.

Country	Measures Applied	Products Affected
Australia	None Reported	No restrictions reported on any coal, petroleum or gas imports.
Austria	Licensing, Excise Taxes	License required to import lignite. Excise taxes applied to crude and refined petroleum products.
Canada	None Reported	No restrictions reported on any coal, petroleum or gas imports
European Union	None Reported	No restrictions reported on any coal, petroleum or gas imports.
Finland	Licensing, Quotas	Discretionary licensing for coal, coke and crude and refined petroleum. Global quotas on refined petroleum products, gasoline and petroleum based coke.
Japan	Quotas, Tariff Quotas	Global quotas on coal imports. Tariff quotas on refined petroleum products and gasoline.
New Zealand	None Reported	No restrictions reported on any coal, petroleum or gas imports.
Norway	Import Authorization	Import authorization needed for peat, refined petroleum and gasoline.
Sweden	Additional Charges	Special additional fiscal charges on coal and natural gas
Switzerland	Surcharges, Excise Tax	Surcharges applied to fuel oil imports. Excise taxes on petroleum based lubricants
United States	Product Specific Tax	Special taxes and charges on crude and refined petroleum products

The above tabulations list the types of restrictions that are applied to energy imports in 11 major OECD markets. The fact that price raising measures (tariff quotas, product specific taxes, surcharges, etc.) are applied in over one-half of these countries could have implications for exporters of refined products, i.e., any attempts to increase trade through subsidies or other price lowering measures could be offset by increased taxes on imports. Importing countries might have an incentive to raise these charges to protect domestic refining industries (or domestic coal producers as in the case of Japan) and could easily do so given that none of these special charges are legally bound under existing GATT regulations.

From the viewpoint of energy exporting countries, how much importance should be attributed to the measures listed above. While there appear to have been no formal studies that attempted to estimate their ad valorem incidence there is reason to believe that they do not have a major cost raising impact on imports. Energy is an important production input for many key OECD industries (agriculture, ferrous and nonferrous metals, transport and machinery, etc.) and binding import restrictions on coal, oil and natural gas could severely disadvantage domestic industry relative to foreign suppliers. However, given that, in the post-Uruguay Round environment, this will be one of the most heavily NTB ridden sectors, further analysis is warranted on the impact of these measures on the level and structure of energy trade.

1. Agriculture

After more than four decades during which agriculture was de facto excluded from mainstream GATT rules the Uruguay Round achieved a major breakthrough. The agreement requires that participating governments do not "maintain, resort to, or revert to any measures of the kind which have been ... converted into ordinary customs duties."¹⁸ The barriers to be converted include virtually all NTBs. Nontariff measures are to be converted into ad valorem or specific tariffs as soon as the agreement enters into force. The resultant tariffs are to be "bound" and reduced over a period of six years.¹⁹ The agreement includes a special safeguard measure which allows an additional duty to be imposed on a product if its price falls, or the volume of imports increases, by a specified amount.

The conversion of NTBs under the "tariffication" exercise was intended to be based on the difference between internal and external prices during 1986-88. The relevant calculations have been undertaken at the four- or six-digit level of the Harmonized System. Tariff equivalents for most processed products were not calculated from direct price comparisons, but were computed as an average of those for the component products weighted by their share in the final good. Both the base year for the tariffication exercise, and the manner in which the calculations were undertaken, could lead to increases in the level of short-term protection, but any such increases should be lowered by the tariff reduction commitments (i.e., industrial countries will lower tariffs by an unweighted 36 percent over six years while developing countries will stage reductions of 24 percent over ten years). In addition, "tariffied" products are subject to minimum access requirements which are guaranteed, where necessary,

¹⁸Article 4.2 of the Agreement on Agriculture. Essentially, the Agreement covers all items in Harmonized System chapters 1 through 24 (excluding fish and fish products) plus a number of additional products like: raw cotton, silk, flax and hemp; wool and animal hair; raw fur skins and other hides and skins; sorbitol and mannitol; essential oils; and several finishing agents. As a result of the exclusion of fish, this product group (along with chemicals and energy products) will be among the most heavily ridden NTB sectors after the Round.

¹⁹A tariff binding is the legally set maximum rate at which an import duty may be set. Actual tariffs can be below the bound rate, but cannot rise above it unless the rate is renegotiated with a country's trading partners. It should be noted the period of tariff reduction is extended to ten years for developing countries, and the least developed countries are not required to make any reductions. They are, however, prohibited from maintaining nontariff measures.

through tariff quotas.²⁰ The Round also achieved commitments to reduce domestic agricultural support measures and export subsidies. These changes should both increase export opportunities for African countries and also substantially reduce the level of price instability in international markets for agricultural goods (see Box 4 on this point). The latter could make an important contribution toward the reduction of African food security problems.

A narrowly defined exception has been made to the general elimination of nontariff measures. Countries may designate certain agricultural products for "special treatment" if they meet specified criteria, thereby exempting them from the tariffication requirement. Despite the right to maintain NTBs on designated products, minimum access requirements will apply on these products which will bring their level of import penetration (i.e., the ratio of imports to consumption) from a minimum of 4 percent up to 8 percent by the end of the six-year implementation period. In order to qualify for special treatment, imports of designated products must comprise less than 3 percent of corresponding domestic consumption in the 1986-88 base period. Second, designated products should not have benefitted from any export subsidies since the beginning of the base period. Third, measures restricting domestic production should be applied to the relevant primary agricultural product. Perhaps the most important example of a product receiving this special treatment is rice in Japan.

2. Textiles and Clothing

The Agreement on Textiles and Clothing in the Uruguay Round provides for the elimination of MFA-type arrangements or, in other words, of all current NTBs in the sector over a ten year period. The phase-out will gradually involve the progressive elimination of quantitative restraints by product category combined with more rapid quota expansion (i.e., quotas must be expanded by more than the quota growth during the 12 month period prior to entry into force of the agreement). Restrictions must be removed from products accounting for not less than 16 percent in terms of 1990 volumes of items covered by the MFA (including those without bilateral QRs at present and non-binding QRs) as soon as the agreement enters into force. There are then three additional phases

²⁰Minimum access opportunities are provided when imports of a product subject to tariffication are less than 5 percent of domestic consumption in the 1986-88 base period. The minimum access opportunity is equal to 3 percent of the base period consumption in the first year, rising to 5 percent in six years. In the case where imports of tariffied products exceeded 5 percent of consumption in the base period countries must maintain the access opportunity that existed in the base period.

Box 4 Nontariff Measures and International Price Stability

Initial analyses of the Uruguay Round's accomplishments relating to NTBs tend to focus on the resulting trade gains. This orientation understates the importance of what was achieved since there is reason to believe other benefits should also result. African countries, for example, have long been concerned with the effects of price and earnings instability for their major exports and imports and have been strong supporters of measures like STABEX and UNCTAD's Common Fund which would assist them counter the adverse effects. Related studies have shown, however, that industrial countries' nontariff measures are an important source of this instability. For example, quotas and other quantitative restrictions (like VERS) make the import demand curve completely inelastic at the point where they become operative. As such, any shift in export supply will result in a greater price change than that which would occur under normal demand conditions. Similarly, European countries' variable import levies -- which are widely applied to agricultural imports -- are designed to shield domestic producers from instability in agricultural prices and earnings, but in doing so have a destabilizing influence on international markets.¹ Actions taken during the Round on NTBs should reduce the importance of the effects of international price instability on African economies.

Variable levies may have both an upward and downward destabilizing influence on the products to which they are applied. When world prices rise variable levies fall and may become negative (i.e., they become subsidies on imports) if the world price rises above the EC's threshold price. In this case EC import demand is higher than under a nominal tariff. The excess demand in an inflationary period contributes to a further increase in world prices. In periods when world prices are falling, however, the variable levies rise thereby restricting any increase in demand. Thus, through their perverse effects on import demand variable levies destabilize world prices. Although EU and EFTA countries rely heavily on variable levies, they are also used by the US and Japan.

Aside from levies, other types of nontariff measures are also recognized to have a destabilizing impact on international trade and prices. For example, in an analysis of international commodity markets the OECD (1982) compiled the following matrix which showed how international price instability would be affected by different NTBs

Importing Country Measures	Variance of Price Instability Compared to that Under Free Trade	
	Exporting Country	Importing Country
Specific Tariff	same	Same
Ad Valorem Tariff	smaller	Larger
Fixed Quota	Generally Larger	Generally Larger
Proportional Quota	Generally Larger	Generally Larger
Import Prohibition	Generally Larger	Generally Larger
Price Fixing	Larger	Smaller or the Same
Variable Levy	Larger	Smaller

relative to what would occur in a free trade situation. The importance of this classification is highlighted by the fact that Laird and Yeats (1990, p. 105) show that more than 70 percent of EC(10) imports of meat, cereals, dairy products, sugar and honey, live animals, and beverages are subject to variable import levies or minimum import prices. Levies are also applied to over 80 percent of Japan's sugar and honey imports while fixed quotas are applied extensively to Japan's meat, dairy, fish and cereal imports. While attempts to quantify exact magnitudes would be useful, there is every indication that the Uruguay Round's "tariffication" of NTBs will make an important contributions to the reduction of global price and trade instability for agricultural products.

¹Food security issues have been a major concern on many African countries and one factor increasing these concerns is the wide variability in international prices for basic import staples like grains. Sampson and Snape (1980) develop quantitative evidence showing that OECD nontariff barriers have played an important role in increasing price instability for these goods. This, in turn, raises the cost of food security programs.

that take effect at the beginning of the fourth, eighth, and end of the tenth years in which an additional 17 percent, 18 percent and 49 percent of the 1990 import volumes must be fully liberalized.

The agreement also establishes a "transitional safeguard" mechanism that allows NTBs to be used in certain circumstances. These safeguards can be applied if increased import volumes cause, or threaten, serious damage to the domestic industry, and they can be maintained for a maximum of three years. The safeguard is invoked on a country-by-country basis, but can only be applied on products which have not yet been integrated into GATT/WTO rules (i.e., products on which MFA type quotas may still be applied). A second restriction on the use of the special safeguard is that it cannot be invoked on an eligible (non-integrated) product if that item is already subject to a MFA quota in the market concerned.

Unlike agriculture, where the removal of most NTBs will occur immediately when the agreement enters into force, the process in the textile and clothing sector will be more gradual. Indeed, a very high share of all quota restrictions by volume existing in 1990 could still be in place until the last day of the ten year phase-out period. Use of the transitional safeguard could also raise the coverage of NTBs above the levels initially suggested by the phase-out schedule. Moreover, since the MFA and its phase-out program are built on a series of bilateral arrangements, and countries face quite different levels of restrictions, it is difficult to make any straightforward judgements about how individual developing countries will be affected. Indeed, the possibility exists that some aspects of the agreement may have adverse implications for Africa unless appropriate policies are pursued. Specifically, African exports will be subject to increased competitive pressures when barriers facing other exporters of their products are liberalized and technical assistance, along with reforms domestic policies, will be urgently needed in order to respond to these increased pressures (see Box 5).

3. Safeguards and the Implications for "Voluntary" Restraints

Over the years voluntary export restraints, and similar bilateral arrangements involving exporters in the administration of restrictions became an increasingly common approach to the protection of domestic industries. Exporters wished to avoid having direct (possibly more restrictive) import barriers on their goods which could also reduce any rents associated with VERs. Importers preferred a less transparent protective arrangement, and one

Box 5
Implications of the Removal of the MFA for African Countries

For over 30 years international trade in textiles and clothing was restricted by the Multifiber Arrangement and its predecessor the Short-Term Textile Arrangement. These "agreements" established quotas on developing countries' exports to the OECD based on pre-existing market shares. This had positive implications for some developing countries and negative effects on others. For example, developing countries that lost their cost competitiveness were still able to export textiles and clothing because of the MFA quotas' "market reservation" effects. Countries which were new producers, or were becoming increasingly cost competitive, found their market shares frozen. With few exceptions (Mauritius and Nigeria) Africa does not face MFA restrictions. However, the MFA probably had positive implications for African exporters in that they were shielded from direct competition with countries that may be more competitive producers (i.e., China, Thailand, Sri Lanka, etc.) due to MFA constraints on the latter.

This situation will be altered dramatically due to the Uruguay Round. MFA quotas will be phased out over 10 years. At this point textile trade will become subject to *aggressive international competition*. Whether Africa can maintain viable textile and clothing exports will depend on its ability to compete with other producers.

Very limited information is available on relative costs in Africa vis-a-vis other textile producing countries, yet the data that exists indicates Africa may have problems. For example, the following shows estimates of the direct costs (in US dollars) for the production of a man's casual long sleeved shirt in India, the United Arab Emirates, and four African countries. In each case, Africa's production costs are above those for India. Costs in Senegal are actually about 50 percent higher. Ghana comes closest to matching the Indian cost structure, but still are 3 percent higher. It should be noted that the above do not incorporate any adverse marketing and distribution costs that may also affect Africa.

Item	Zimbabwe	Kenya	Senegal	Ghana	India	UAE
Fabric	3.28	3.00	4.31	3.18	2.90	2.95
Misc. Materials	0.31	0.40	0.55	0.42	0.39	0.37
Washing	0.10	0.12	—	0.11	0.12	0.12
Labels/Packaging	0.16	0.31	0.36	0.36	0.40	0.42
Direct & Indirect Labor	1.72	1.34	2.36	1.22	1.22	1.60
Transport to Port	0.18	0.20	0.15	0.05	0.15	0.17
TOTAL OF ABOVE ITEMS	5.75	5.37	7.73	5.34	5.18	5.63

Source: Biggs *et. al.* (1994). The authors report (p. 37) that no data could be collected for Cote d'Ivoire because the only remaining garment exporter was unable to compete for standard shirt export orders. Also, the authors include a MFA quota cost in India's total production costs. These charges are excluded from the above totals due to the Round's agreed phase-out of MFA restrictions. It should be noted that the above cost comparisons were made for a period prior to the CFA devaluation. As a result of this exchange rate adjustment Senegal's cost structure is now probably closer to that of the other countries.

To compete effectively in the post-Uruguay environment Africa will need to adopt reforms that will allow domestic producers to be cost competitive. These reforms must address a broad range of measures, from the impact of government imposed trade barriers that raise the costs of imported production inputs, to measures that limit access to the most efficient international sources of finance, technology, transport and communications. Indeed, the Uruguay Round appears to have shifted the focus for further reforms to the African countries themselves to ensure that they can react to the new export opportunities and competitive challenges resulting from the multilateral trade negotiations.

where neither explicit compensation, nor the constraint of nondiscrimination rule, would apply. Another reason why safeguard measures were used less frequently may have been the growing reliance on antidumping and countervailing duty actions. While safeguard actions are a tacit admission of the inability of a domestic industry to compete, antidumping and countervailing duties are instruments whose justification is the counteraction of unfair behavior on the part of foreign producers or governments.

The Uruguay Round Agreement on Safeguards seeks to provide more flexible arrangements, but under tighter rules. There is a relaxation of the nondiscrimination rule in exceptional circumstances, and no compensation is required during the first three years that a measure is applied. On the other hand, safeguards can only be applied for a limited period (four years, renewable for a further four), and cannot be renewed for the same time period for which they were originally applied. In addition, safeguards must be progressively liberalized, and are subject to surveillance and review.

The most significant feature of the safeguards agreement, however, is the *commitment to eliminate all voluntary restraints (VERs)*. All VERs, with the exception of one per country, are to be removed within a period of four years. The exception of a single measure from the general phase-out commitment was designed to accommodate the wish of the EU to continue to restrict Japanese auto imports. According to the agreement, however, the single exception permitted to each party runs only until December 31, 1999. This commitment implies a significant reduction in nontariff measures facing all developing countries, although the immediate direct impact on African exporters, which with one or two exceptions do not face these measures, will be limited. Africa could, however, face substantial new competition from countries whose exports were formerly blocked by VERs once these measures are lifted. Industry sectors where such heightened competition should occur include ferrous metals and footwear.

C. Implications for African Exports: The Round's Effects on NTBs

The overall importance of pre-Uruguay Round NTBs is evident from the fact that approximately \$5.9 billion of OECD imports from Africa face these measures -- \$4.4 billion excluding South Africa, see the data in Table 7. This raises the question of how the Round will influence the overall level of nontariff protection facing

sub-Saharan Africa, and how will the relative importance of NTBs on different types of export products change. Using published details on the agreement (GATT 1994), Table 11 provides an indication by showing the pre-Uruguay Round NTB coverage ratios for individual African countries along with an estimate of what the ratio will be after the agreement is implemented. These estimates were derived by tabulating the value of pre-Uruguay Round trade that will still be subject to (post-Uruguay Round) NTBs, and then expressing this value as a share of total (pre-Uruguay Round) exports.²¹ In order to more clearly show the impact of the Round, Table 11 classifies countries into three groups (highly NTB affected, moderately affected, and largely unaffected) based on their pre-Uruguay Round coverage ratios.

For several countries the estimated change in the nontariff barrier coverage ratios are dramatic. Prior to the Uruguay Round, 83 percent of Reunion's exports (which consist largely of sugar) faced OECD restrictions while this ratio should fall to zero as a result of the agreement. The coverage ratio for Mauritius should decline by almost 60 percentage points (to just over 2 percent) after textile and clothing restrictions are lifted from this countries' exports, while the tariffication of agricultural NTBs causes Cape Verde's ratio to decline from about 40 percent to zero. Overall, the share of Africa's non-oil exports that face nontariff barriers should decline from approximately 11 to about 3 percent.

Figure 4 presents another perspective on the impact of the Round by showing how it altered the overall profile of nontariff protection facing Africa. The top most line N_0 ranks African countries in terms of increasing pre-Uruguay Round NTB coverage ratios (the ratios increase as one moves rightward along the horizontal scale), while the lower line (N_1) indicates what the estimated coverage ratio for each country will be after the Round. Actual values of NTB coverage ratios are recorded on the vertical axis.

²¹The results -- the post Uruguay Round coverage ratio (C_{pr}) -- was derived from,

$$(1) \quad C_{pr} = V_m \div V_b$$

where V_m is the value of pre-Uruguay exports that will still be subject to post-Uruguay Round NTBs and V_b is the total value of pre-Uruguay Round exports. This measure probably overstates the importance of remaining nontariff barriers since the removal of the OECD nontariff barriers should produce a trade response. That is, African exports should increase as a result of the liberalization of OECD NTBs which would make the denominator in the above expression larger, and coverage ratio smaller. Whether African trade in textiles and clothing expands, however, largely depends on these countries adoption of necessary measures to achieve cost competitiveness.

Table 11. Pre and Post Uruguay Round NTB Coverage Ratios for Individual Sub-Saharan African Countries.

	1992 OECD Imports (\$ million)		OECD Nontariff Measure Coverage Ratio					
			All Goods			All Non-Oil Goods		
Exporter	All Goods	All Non-Oil Goods	Pre-Uruguay	Post-Uruguay	Change	Pre-Uruguay	Post-Uruguay	Change
<u>HIGHLY NTB AFFECTED</u>								
Seychelles	37	37	91.4	84.7	-6.7	91.4	84.7	-6.7
Reunion	154	154	83.0	0.0	-83.0	83.0	0.0	-83.0
Mauritania	1279	1279	61.6	2.2	-59.4	61.7	2.3	-59.4
Cape Verde	7	7	39.5	0.0	-39.5	39.5	0.0	-39.5
Congo	1440	508	38.5	38.0	-0.5	3.8	2.2	-1.6
Malawi	393	393	29.6	3.7	-2	29.6	3.7	-25.9
Cameroon	1577	814	20.8	19.7	-1.1	3.7	1.6	-2.1
Zimbabwe	875	875	20.3	6.9	-13.4	20.5	7.1	-13.4
<u>MODERATELY NTB AFFECTED</u>								
Senegal	362	357	19.1	0.0	-19.1	19.1	0.0	-19.1
Sao Tome & Principe	5	5	17.2	2.7	-14.5	17.5	3.0	-14.5
Gabon	2119	458	15.8	15.8	0.0	1.5	1.5	0.0
Nigeria	11379	497	14.4	14.4	0.0	1.0	0.9	-0.1
Cote d' Ivoire	2258	2223	14.1	1.5	-12.6	14.4	1.6	-12.8
South Africa	11132	9490	13.0	3.7	-9.3	11.5	0.6	-10.9
Sudan	149	149	12.4	4.1	-8.3	12.4	4.1	-8.3
Burkina Faso	53	53	12.3	0.0	-12.3	12.3	0.0	-12.3
Mozambique	147	147	10.3	0.6	-9.7	10.3	0.6	-9.7
Somalia	19	19	9.0	0.0	-9.0	9.0	0.0	-9.0
Madagascar	340	340	7.6	2.9	-4.7	7.6	2.9	-4.7
Djibouti	4	3	5.2	5.2	0.0	5.2	5.2	0.0
Angola	3684	219	4.7	4.7	0.0	1.2	0.8	-0.4
Tanzania	266	266	3.8	0.5	-3.3	4.1	0.8	-3.3
Kenya	837	833	3.5	0.3	-3.2	3.5	0.3	-3.2

Table 11. Continued

	1992 OECD Imports (\$ million)		OECD Nontariff Measure Coverage Ratio					
			All Goods			All Non-Oil Goods		
Exporter	All Goods	All Non-Oil Goods	Pre-Uruguay	Post-Uruguay	Change	Pre-Uruguay	Post-Uruguay	Change
<u>NTB UNAFFECTED COUNTRIES</u>								
Ethiopia	160	160	1.8	1.2	-0.6	1.8	1.2	-0.6
Mauritania	413	413	1.3	1.0	-0.3	0.3	0.0	-0.3
Guinea Bissau	8	8	1.3	0.2	-1.2	1.6	0.5	-1.2
Benin	76	66	1.3	0.3	-1.0	1.5	0.3	-1.2
Rwanda	64	64	1.1	0.2	-0.9	1.1	0.2	-0.9
Zambia	630	630	0.7	0.0	-0.7	0.7	0.0	-0.7
Comoros	28	28	0.6	0.6	0.0	0.6	0.6	0.0
Gambia	183	183	0.5	0.3	-0.2	0.5	0.3	-0.2
Togo	121	118	0.5	0.1	-0.4	0.5	0.1	-0.4
Ghana	886	872	0.4	0.2	-0.2	0.2	0.0	-0.2
Mali	117	117	0.4	0.2	-0.2	0.4	0.2	-0.2
Guinea	526	526	0.3	0.1	-0.2	0.3	0.1	-0.2
Niger	184	184	0.2	0.1	-0.1	0.2	0.1	-0.1
Burundi	74	74	0.1	0.0	-0.1	0.1	0.0	-0.1
Chad	66	66	0.1	0.1	0.0	0.1	0.1	0.0
Central African Rep.	102	102	0.1	0.1	0.0	0.1	0.1	0.0
Equatorial Guinea	39	39	0.1	0.1	0.0	0.1	0.1	0.0
Sierra Leone	354	354	0.1	0.0	-0.1	0.1	0.0	-0.1
Uganda	162	162	0.0	0.0	0.0	0.0	0.0	0.0
Zaire	1277	1126	0.0	0.0	0.0	0.0	0.0	0.0
Liberia	804	720	0.0	0.0	0.0	0.0	0.0	0.0
Sub-Saharan Africa	44791	25137	13.1	8.0	-5.1	10.8	3.3	-7.5

Source: NTB information from World Bank-UNCTAD SMART Database. Trade data from UN COMTRADE Records.

Figure 4: Illustration of the Impact of the Uruguay Round on the Profile of Nontariff Protection Facing African Countries

This presentation suggests that African countries could be classified in three groups as far as the Uruguay Round results are concerned. Those in the left side of the figure (like Burundi, Ethiopia, Gambia or Mali) had very low coverage ratios before the Round so these countries' direct export prospects could not be much improved. They do have the potential, however, of being adversely affected by more aggressive competition with exporters who were formerly restricted by the MFA Agreement, or by "voluntary" export restraints (see Box 4). Second, the right side of the Figure identifies countries like Reunion and Mauritius which previously had high NTB ratios that will fall dramatically due to the Round. (note, however, that tariffs on sugar will afford higher levels of protection). These countries may have significant new export opportunities, although they too should prepare for more aggressive international competition. Between these two groups are a number of countries like Nigeria, Congo, Gabon or the Seychelles with relatively high pre-Uruguay NTB ratios that were largely unaffected by the UR agreement. In most cases, the failure of the Round to liberalize restrictions on energy products account for these results (as noted, the exclusion of fish explains the high post-Uruguay ratios for the Seychelles and a few other countries). However, even with these exceptions Figure 4, shows the Round had a major impact in lowering nontariff protection facing Africa.

D. Protection Levels from Tariffed NTBs

Given the dimensions of rural poverty in Africa, and the potential contribution increased agricultural exports could make toward its alleviation, special attention should focus on the external "environment" for these exports in the post-Uruguay Round world. A recent World Bank study (Ingco 1995) attempted to estimate the levels of protection associated with the "tariffed" agricultural NTBs, and to assess their implications for developing country exporters. The initial conclusions concerning this exercise are not comforting since there is evidence that the "dirty tariffication" of the Round may have permitted higher levels of protection than previously in place.

As an illustration, Table 12 shows World Bank estimates of the levels of OECD protection for 8 agricultural product groups as a result of the tariffication exercise. In the European Union, post-Uruguay Round protection for sugar, beef and rice (all products of actual export interest to Africa) range from 125 to 360 percent. In Japan, sugar, coarse grains and rice face levels of protection that range from over 100 to 500 percent. Even a country like the United States, which is generally held to have low levels of agricultural protection, still registers

Table 12. Nominal Protection Afforded by "Tariffied" Nontariff Barriers Facing OECD Agricultural Imports.

	Nominal equivalent of tariffied nontariff barriers (%)							
Importing Country	Rice	Wheat	Coarse Grains	Sugar	Beef and Veal	Pork	Poultry	Dairy
Australia	0.0	0.0	0.4	52.4	0.0	0.0	0.0	6.7
Canada	0.9	57.7	34.7	34.7	38.0	0.0	226.0	288.4
United States	5.0	6.0	8.0	197.0	31.0	0.0	7.0	144.0
European Union	360.5	155.6	134.4	297.0	125.4	51.7	44.5	288.5
Japan	500.0*	239.6	233.1	126.1	38.5	87.3	14.0	489.4
New Zealand	0.0	0.0	7.2	2.9	0.0	20.0	28.5	19.6
Austria	0.0	400.0	241.0	178.0	239.0	178.0	38.0	463.0
Finland	10.0	352.0	204.0	493.0	394.0	320.0	264.0	389.0
Norway	454.0	495.0	394.0	na	405.0	428.0	379.0	435.0
Switzerland	67.0	179.0	242.0	273.0	479.0	227.0	767.0	795.0
Turkey	50.0	200.0	200.0	150.0	250.0	250.0	30.0	200.0

*Delayed tariffication on this product. The figure shown is the estimated pre-Uruguay Round level of support.

Source: Merlinda Ingco, Agricultural Trade Liberalization in the Uruguay Round: One Step Forward, One Step Back?, (Washington: Supplementary Paper for the Conference on the Uruguay Round and Developing Economies, Washington, January 26-27, 1995).

"tariffed" rates of over 30 percent for beef, and close to 200 percent for sugar. How are African countries expected to compete with domestic (OECD) producers when the latter receive such high levels of border protection?²² It should also be noted that regionalism is a factor here. Under OECD arrangements industrial countries' exports of many of these products receive significant preferences while developing countries face the full (high) tariffed rates.

Aside from the direct border controls on agricultural products, other OECD measures have an adverse impact on African and other developing country exporters of agricultural products. Behind the high wall of external European protection huge surpluses of products like sugar, dairy and beef have been generated. To dispose of these surpluses OECD countries have often resorted to (highly) subsidized exports that have a well documented two-fold impact. First, these shipments have displaced developing country producers in third country (export) markets. Second, a similar displacement occurs in the domestic markets of developing countries as local producers are unable to compete with the subsidized foreign suppliers. While many African countries have been (rightly) criticized for domestic policies that disadvantage local agricultural producers, more attention should also be given to the potential adverse influence of foreign (OECD) export practices.²³

E. Appropriate OECD Policy Action on NTBs

OECD nontariff trade barriers have contributed to Africa's relatively poor trade performance in some specific product sectors, although they do not seem to have played a major role in the general decline. With a few exceptions African countries have not been subject to MFA restrictions, and no African country has faced a "voluntary" export restraint. Similarly, in the 1980s only 2 OECD antidumping actions were taken against any sub-

²²Available evidence suggests that the benefits of agricultural trade liberalization may be very impressive for developing countries such as those in Africa when viewed in terms of domestic employment effects. This conclusion is based on studies by the International Labor Office (Lydall, 1975) which show that developing countries may use (on average) up to 30 times as much labor per unit of agricultural output as some developed countries. Furthermore, the ILO studies conclude that the linkage and multiplier employment creation effects in the agricultural sectors of developing countries are among the largest of all industry groups. The implications of these findings are that increased opportunities for agricultural exports could make a significant contribution to alleviating the basic social and employment problems in African countries.

²³It should be noted, however, that these practices may have benefitted developing countries that were net food importers to the extent that they lowered international prices and net food import bill.

Saharan African country (out of a total of 1,300 such cases) and in only one case was a countervailing action taken (out of 460 total actions). That the relative unimportance of nontariff protection cannot be held responsible for its poor export performance is also reflected in the fact that pre-Uruguay Round NTB coverage ratios for African exports were about one-half those for the successful fast growing developing country exporters in East and South Asia.

The situation regarding the future importance of NTBs is somewhat unclear due to the major achievements the Uruguay Round made on the liberalization of these measures, and the extent to which OECD countries may attempt to adopt other measures (like antidumping actions or safeguards) to circumvent the liberalization. However, there do appear to be several policy options and/or research initiatives that could be particularly important for Africa. These include:

- The Uruguay Round converted agricultural trade barriers to [specific] tariffs which may incorporate levels of protection of several hundred percent -- which may be all but prohibitive for many potential suppliers. Given the problem of extreme rural poverty in Africa, and the potential contribution increased agricultural exports could make toward its reduction, policy initiatives are needed to reduce this protection against African food exports. One possible option would be to extend (ceiling free) preferences under established GSP programs.

- The Uruguay Round dramatically changed the profile of nontariff barrier protection facing developing countries. The UNCTAD Inventory of Trade Control measures should be updated to reflect the current (pre-Uruguay Round) situation and to identify remaining NTBs which are of particular importance to Africa (like those on fisheries and energy products). Also, monitoring mechanisms need to be developed to ensure that no legalized or other backsliding occurs in sectors where nontariff protection is being relaxed. This might involve a cooperative effort between various international institutions.

- Aside from the direct adverse effects of OECD agricultural trade barriers, developing countries exports to third markets often have been undercut by subsidies that industrial countries have employed to dispose of surpluses generated behind high level of external protection. While the Uruguay Round did achieve some discipline in the use of such subsidies what was achieved appears to have fallen far short of what had been envisioned at the start of the Round. Analyses should be undertaken to determine where export incentives have had their most important adverse effects on Africa, and what sorts of corrective policy actions could be implemented.

- In many of the poorer developing countries problems associated with food security and spoilage are of major importance. Since further processing (canning, drying, freezing, packaging, etc.) generally extends the usable life of a product any external constraints to the development of this activity -- where output would be directed to both internal and external markets -- should be removed. In particular, the preferences OECD countries extend each other under regional FTAs have increasingly disadvantaged African export oriented food processing industries. Measures are needed to, *at least*, place sub-Saharan African countries and other developing countries on an equal competitive footing with OECD members.

V. Issues Relating to Transport Costs

Unlike foreign (government imposed) trade barriers, relatively little attention has been given to the influence of other market access barriers like Africa's international transportation costs for exports.²⁴ Transport costs have an impact similar to tariffs in that they impose additional charges foreign producers must absorb to penetrate export markets, and they are subject to direct policy control by national governments and traders. Also, transport costs are particularly important for sub-Saharan Africa since these countries normally must absorb all, or most, of these charges for penetrating foreign markets (see Box 6). However, in contrast to tariffs, major differences in the incidence of freight charges on individual exporting countries can occur. General Agreement on Tariffs and Trade (GATT) provisions require tariffs be assessed on an (equal) most-favored-nation basis, while international transport costs for similar goods may vary markedly across countries. Those which are geographically disadvantaged, or have pursued inappropriate national policies relating to the transport sector, may experience important adverse freight rates.²⁵

In spite of the attention devoted to the influence of transport costs on intra-OECD trade flows (Sampson and Yeats 1976, 1977), or on the exports of developing countries in Asia and Latin America (Brodsky and Sampson 1979, Yeats 1976, 1977), no similar analyses has been conducted for sub-Saharan Africa. This chapter undertakes such an investigation to complement the previous analyses of tariff and nontariff barriers. The objective is to

²⁴The neglect of transport costs may have been due to difficulties in getting data on their incidence, or to the (erroneous) assumption these charges could not be influenced by policy makers. Another reason may have been the presumption that nominal transport costs, relative to tariffs or nontariff barriers, were small. Empirical studies show these views should be re-examined. For example, two analyses of barriers to Indian and Indonesian exports determined ad valorem freight costs on these countries' exports to the United States were four to five times pre-Uruguay Round tariffs (Yeats 1976, 1977). For some products groups like woven textile fabrics, textile yarn and thread, footwear, or leather manufactures nominal freight costs ranged from 20 to 30 percent. These investigations also show countries may be able to substantially reduce freight costs by adopting more efficient technologies in port and handling procedures, removing barriers to competition for transport services, or organizing shippers to make the more efficient use of liner conference services.

²⁵An interactive effect between tariffs and freight costs may further worsen the competitive position of an exporters facing above average freight rates. Most countries apply tariffs on the cost-insurance-freight (c.i.f.) value of imports (the United States and Canada are important exceptions) so exporting countries which have higher freight costs will, *ceteris paribus*, pay higher import tariffs. Stated differently, if African exports generally experience adverse freight rate differentials their competitive position would be further eroded by c.i.f. tariffs.

Box 1

The Incidence of International Transport Costs on Exporters and Importers.

While transport costs are formally paid by exporters when goods are sold on a c.i.f. basis, and by the importer when purchases are f.o.b., the party paying the freight bill does not necessarily bear the transport cost. In practice, the exporter can be regarded as bearing freight costs if the delivered price in the importing market is not affected by changes in transport costs. Conversely, the importer bears the cost of transport if the commodities price in the export market remains the same irrespective of changes in shipping costs.

panel (a)

panel (b)

Factors that determine the incidence of transport costs are illustrated in panel (a) (above) which depicts a situation in which the delivered price schedule (SS) for an export is inelastic with respect to price. In the absence of freight costs, quantity ON would be consumed in the importing market at price OP. Assuming that shipping costs of T per unit are introduced they would not influence the market clearing price. Any attempt by exporters to add these charges to prices, necessitating an increase from OP to OC, would be frustrated by a shortfall of demand relative to supply. Excess supply would force the market clearing price back to OP where the f.o.b. price received by exporters is OP. Thus, in a situation where supply is perfectly inelastic exporters bear the entire burden of freight costs.

Panel (b) illustrates a situation where an inelastic demand curve for an export combines with a less than perfectly inelastic supply schedule. In the absence of freight costs, quantity ON clears the market at price OP. However, if freight costs of T per unit are introduced, supply shifts leftward by an amount equal to the transport charge. Thus, SS represents the f.o.b. supply curve, while S'S is the c.i.f. schedule. The market clears at the same quantity (ON), but at a higher price (OC) born by importers. Therefore, when demand is perfectly inelastic the supply schedule does not influence who bears freight costs — importers bear the full brunt of transport costs, or any changes in these charges.

In practice, completely inelastic demand or supply schedules are seldom observed — these limiting situations are employed to indicate tendencies for freight costs to fall on exporters or importers. Normally, the incidence of transport costs on buyers or sellers is determined by respective elasticities of demand or supply. When supply is relatively inelastic (a likely normal situation for many African products in the short run) the exporter bears the major part of the freight bill, and the price he receives falls below the "zero transport cost" price roughly by approximately the full extent of shipping costs.

With a less than perfectly inelastic supply, any reduction in the elasticity of demand shifts some of the transport burden to the importer. When demand and supply schedules have equal elasticities, shipping costs are shared equally by buyers and sellers. As demand grows progressively less elastic, the share of freight costs born by importers rises, with the elasticity of demand determining the extent to which quantity exchanged falls below that traded in the absence of freight charges. A key point to note is that the African countries are generally small suppliers in world trade so the demand for their products should be quite elastic. As the above figures show, this suggests that the incidence of transport costs (or changes in these costs) will fall most heavily on African exporters.

determine whether relative differences in freight costs between Africa and other countries contributed to the former's poor export performance and what influence these costs have on the location of industrial activity in Africa.²⁶ This chapter also attempts to determine whether the *structure* of freight costs on African exports has influenced the composition of goods shipped, i.e., are these charges biased (say) against processed goods in favor of primary commodities? Finally, several possible explanations as to why abnormalities in Africa's transport cost profile occur are suggested, and options African governments might utilize for reducing international freight costs are discussed.

Before proceeding, it should be noted that analyses of balance of payments statistics (Amjadi and Yeats, 1995) illustrates the importance of this objective. Specifically, this World Bank study showed that sub-Saharan Africa's net freight and insurance payments were about \$3.9 billion in 1990/91, which represents approximately 15 percent of total value of the region's exports. However, the individual country's statistics reflect a wide degree of variation around this average. Net transport and insurance payments average more than 25 percent of total exports for 10 of the 30 countries which had available data. The 1990 net payments averaged 42 percent for the 10 landlocked African countries (namely, Burkina Faso, Central African Republic, Chad, Ethiopia, Malawi, Mali, Niger, Uganda, Zambia and Zimbabwe) whose trade must transit neighboring territories and, therefore, incur additional foreign exchange costs. For all developing countries as a group these payments average 5.8 percent, a figure which represents about one-third the corresponding African ratio.

A. The Evidence from National Customs Statistics

Data compiled by some national customs services can be used to provide some perspectives on the incidence of international transport costs for African exports. Since 1974 the United States has tabulated imports, by-product-

²⁶Over twenty-five years ago Little, Scitovsky and Scott (1970, p. 310) suggested capital intensive transport technologies (such as containerization) could place some developing countries at an important cost disadvantage. They noted "because competitive pressures in developed countries are stronger, containers, and possibly other innovations in transportation, will be introduced there first, and will not spread to developing countries' trade for a long time. This might be accompanied by a fundamental change in the whole system of rate fixing, since it would seem rational to base the charge on the container rather than on its contents. The result might be a big reduction in freight on exports of manufactures between developed countries, putting exports from developing countries at a severe disadvantage. There are already appreciable economies of scale in shipping, and these may be increased by the introduction of containers. Small volumes of traffic coming from small ports cost more to handle than big volumes from big ports."

by-country, on a joint free-alongside-ship (f.a.s.) and cost-insurance-freight (c.i.f.) basis. (Argentina, Brazil, Chile, Mexico, Panama, Philippines, Uruguay and Venezuela are among other countries that follow similar procedures). The f.a.s. valuation includes the purchase price of the product plus all charges incurred in placing merchandise along the vessel at the port of exportation.²⁷ In contrast, the c.i.f. valuation measures the value of imports at the port of entry in the United States and includes all freight, insurance, and other charges (excluding import duties) incurred in bringing the merchandise from the port of exportation and placing it alongside the carrier.²⁸ Since this detailed freight cost information is available for almost two decades it can be used to determine how African freight rates compare with those for other countries, and how these charges have changed over time.

Several points should be noted regarding the available transport cost data. First, although the United States ranks below OECD Europe as a destination for Sub-Saharan countries exports, this trade exceeded \$10.8 billion in 1993 which places it ahead of any other market. For some countries like Angola, Congo, Liberia, Nigeria, Sierra Leone, and Zaire over one-fifth of total exports went to North America. Second, although U.S. imports are concentrated in fuels, foods, and raw materials, some labor intensive manufactured goods are still of sufficient importance that freight costs can be analyzed for these products. As such, the United States transport cost information should provide a useful "base" for assessing the importance of the comparative level and changes in

²⁷An important limitation of these data is that they do not reflect the cost of inland transportation -- which may be very high for some African countries -- or port charges. The importance of the latter should not be underestimated. For example, World Bank data compiled by Tyler Biggs show port charges for clearing a 20 foot container in Abidjan (Cote d'Ivoire) and Dakar (Senegal) were \$1,100 and \$910 respectively. In contrast, the ocean freight cost for shipping the container to the Hamburg/Le Havre ranged between \$1,350 to \$1,430.

²⁸The c.i.f. to f.a.s. ratio can be used to measure nominal international transport and insurance charges for exports of product i from country j (F_{ij}) from:

$$(2) \quad f_{ij} = (V_{c,ij} - V_{f,ij}) \div V_{f,ij} \\ = (V_{c,ij} \div V_{f,ij}) - 1$$

where $V_{c,ij}$ represents the c.i.f. and $V_{f,ij}$ is the f.a.s. value of exports of tariff line level product i from country j to the United States. The measure understates the true importance of transportation costs for land-locked African countries. Since the f.a.s. value is measured alongside the ship at the exporting country it excludes costs incurred by a land-locked country in transitting its neighbors. United States import statistics tabulate the f.a.s. and c.i.f. values of goods imported by air and ocean vessel separately so nominal freight rates for both these modes of transport can be estimated. A further point is that equation (1) likely will not reflect port costs as it primarily measures "at sea" charges. Several related studies suggest that port costs and port problems in many African and other developing countries often are of key importance for exporters (see Hans Jurgen Peters (1989)).

African freight costs.

Table 13 is based on this information and provides summary statistics on 1993 tariffs and transport costs for African exports to the United States. In the interest of brevity the data are compiled for specific regional-income level country groups employed by the World Bank (i.e., low income East and Southern Africa, middle income West Africa, etc.) and for the largest African exporting countries in each group. Given its level of industrialization, which could allow it to utilize more sophisticated and cost efficient transport technologies, similar statistics are also provided for the Republic of South Africa. The table also shows nominal freight rates facing all other countries (with the exception of Mexico and Canada) exporting the same underlying tariff line level products.²⁹ These data are included to help determine whether African countries' transport cost profiles are substantially different from their competitors.

The key points reflected in Table 13 are as follows. First, average ad valorem transport costs for all sub-Saharan countries exports (about 8.7 percent) are more than 8 points higher than the average tariff on these goods (0.5 percent).³⁰ Freight costs are, therefore, *a far more restrictive barrier to African exports than tariffs*, a point that should direct increased attention to transport cost saving measures. Second, a high degree of variation exists in the incidence of transport costs across the African countries which, at least in part, are influenced by differences in the goods exported. Nominal freight rates for Guinea average about 25 percent, largely due to a high concentration of exports (over 80 percent) in unprocessed aluminum ores, a bulky relatively low value product.

²⁹The very disaggregate level of these comparisons is reflected in the fact that United States customs schedules differentiate between some 8,500 individual tariff line products. The reader should note the data in Table 13 are trade weighted averages based on African exports. Canada and Mexico are not included in the "other countries" group since their exports may pass into the United States through land border crossings and not incur international transport costs. Similarly, other sub-Saharan African countries are excluded from the "competitors" group since the objective was to determine whether African freight costs differ from those of exporters outside the region.

³⁰The sub-Saharan totals reported here, and in the subsequent tables, exclude the African oil exporting countries (Angola, Congo, Gabon and Nigeria) since their relative importance in global energy trade may have lead to the development of transport systems and infra-structure that was significantly different from other African countries. A second point is that some of the tariff averages reported in Table 13 warrant explanation. The 11.6 percent duty facing Malawi is due to the fact that over 55 percent of this country's exports consist of stemmed tobacco which has a 14.4 percent import tariff. Similarly, tobacco and various clothing products (which do not receive GSP preferences in the United States) account for the 12.2 percent average shown for Zimbabwe. The high concentration of Mauritius' exports in textiles and clothing accounts for the 16.2 percent tariff average.

Table 13. African Transport Costs for Exports to the United States Compared with Competing Nations.

African Group and Major Supplier(s)*	Value of Exports (\$ millions)	Average Tariff (%)	Average Nominal Freight Rate (%)	
			African Group	Other Countries
ALL SUB-SAHARAN AFRICA	1,737.6	0.5	8.7	7.2
Low Income East and Southern Africa	778.9	1.1	6.8	5.3
Kenya	92.3	0.6	8.8	6.5
Malawi	84.2	11.1	10.0	5.4
Zaire	240.7	0.5	5.4	4.9
Zimbabwe	142.3	3.2	9.2	6.0
Low Income West Africa	418.7	0.3	11.4	10.0
Benin	15.7	0.7	7.5	7.2
Ghana	208.5	0.0	4.7	4.4
Guinea	113.0	0.0	25.2	22.0
Middle Income East and Southern Africa	253.1	12.8	6.7	5.6
Mauritius	196.4	14.4	7.1	5.8
Middle Income West Africa	287.0	0.6	11.3	9.9
Cameroon	101.2	0.8	9.7	8.5
Senegal	7.5	2.6	12.1	7.4
Oil Exporting Countries	8,833.1	0.7	6.4	7.6
Nigeria	5,309.5	0.7	5.8	7.6
Republic of South Africa	1,851.0	1.6	4.5	4.3

*The country group definitions are as follows:

(i). The all sub-saharan group includes all countries listed below except the oil exporting countries (Angola, Congo, Gabon and Nigeria) and the Republic of South Africa.

(ii). Low income East and Southern Africa includes: Burundi, Comoros, Eritrea, Ethiopia, Kenya, Lesotho, Madagascar, Malawi, Mozambique, Rwanda, Somalia, Sudan, Tanzania, Uganda, Zaire, Zambia, Zimbabwe.

(iii). Low income West Africa includes: Benin, Burkina Faso, Central African Republic, Chad, Equatorial Guinea, The Gambia, Ghana, Guinea, Guinea-Bissau, Liberia, Mali, Mauritania, Niger, Sao Tome and Principe, Sierra Leone and Togo.

(iv). Middle income East and South Africa includes: Djibouti, Namibia, Swaziland, Botswana, Mauritius, Mayote, Reunion, and the Seychelles.

(v). Middle income West Africa includes: Cameroon, Cape Verde, Cote d'Ivoire and Senegal.

(vi). The oil exporting countries include: Angola, Congo, Gabon and Nigeria.

Source: Nominal transport costs computed from United States Department of the Census trade tapes. Pre-Uruguay Round tariff averages are from Erzan and Svedberg (1989).

In contrast, Ghana's relatively low freight rate (under 5 percent) reflects the high share of diamonds (about 35 percent) in this country's total exports. Seemingly, very different values and stowage factors for the goods being exported explain some of the cross-country variation in African freight costs.

A third point reflected in Table 13 is that average nominal freight rates for African exports are consistently higher, with the exception of the oil exporters, than those on similar goods shipped from other countries.³¹ For all sub-Saharan countries combined, ad valorem freight costs are about 20 percent above their competitors. However, these aggregate figures conceal the true importance of adverse freight rates on specific products due to the overall importance of gemstones, gold, other precious metals and similar products in African exports. Freight is typically a very small share of these high value, easily transportable products, so wide variations in their nominal transport costs will not occur (however, for some footwear, textile and clothing products African transport costs range between 15 to 50 percent -- see Table 14). Also, many products like coffee, cocoa, petroleum and metal ores can be transported by bulk carriers, tankers, or tramp shipping which can be chartered in more competitive markets than those for the liner trades. This study will later argue that government policies relating to the liner trades plays an important role behind Africa's adverse freight costs.

B. The Magnitude of Cross-Product Variation in Freight Costs

An important question concerns the magnitude of the variance in African transport costs across products - particularly manufactured goods. If sectors exist where the nominal freight costs are low, or the adverse African transport differential narrows (or is even reversed), their identification may be helpful for "flagging" potentially promising areas for investment and the promotion of export ventures. A related question is whether the adverse African transport cost differentials generally extends to different types of carriers. Since the United States data distinguish between air and vessel shipments, African freight rates for each mode of transport can be analyzed

³¹The reversal is due to the fact that Africa (particularly Nigeria) exports a light high quality crude to the United States which generally commands a price premium over crude petroleum shipped from other regions. For example, the U.S. Department of Energy (1995, p. 112) estimates that in 1993 the average price per barrel of Nigerian crude was \$17.79 as opposed to an average price of \$14.78 for all OPEC shipments. As a result of this African price premium the nominal freight rate (i.e., actual freight charges as a percentage of product price) for Africa is lower than average for all OPEC members.

separately (air freight currently accounts for about 25 percent of all United States imports in terms of value). This is a potentially important consideration, particularly for the land-locked African countries. If air freight is commercially feasible for some products this could allow them to avoid costly land transport across their neighbors territories.

Table 14 addresses this point by showing the value of exports along with sub-Saharan African air and vessel freight rates for each two-digit Harmonized System (HS) product group with \$50,000 or more in trade. In addition, the average African freight rate margin has been tabulated along with the value of exports utilizing each mode of transport. Over 20 percent of African exports (by value) enter the United States by air with the balance shipped by vessel. However, for almost one-quarter of the two-digit product groups the share of sub-Saharan exports by air actually equals or exceeds 50 percent. As might be expected these groups are composed mostly of high value non-bulky products i.e., scientific instruments, clocks and watches, pearls and precious stones, etc. Similar information on air-vessel shipments and cross-product transport costs for each of the regional African country groups is provided in the appendix tables.

The statistics in Table 14 show nominal freight rates pose an important barrier to African efforts to expand exports -- particularly for some manufactures where opportunities for increasing the value added content of traded goods may be most promising. For approximately one-quarter of the products listed, African nominal freight rates exceed 15 percent and for 10 product groups rates of over 20 percent occur. To put the importance of these figures in perspective, the average post-Uruguay Round tariff on United States imports from all sources is under 4 percent. In short, transports costs place African producers' at a far greater competitive disadvantage *vis-a-vis* US producers than do tariffs. However, these nominal rates probably understate the true importance of transport costs for two reasons. First, they do not indicate their influence on African producers value added in export oriented production ventures. As a result of such high freight costs African producers may have to reduce payments to factors of production to such an extent that otherwise promising export the ventures are not viable. A similar situation may occur when tariffs, like those in many African countries that might be markets for intra-trade, are set at prohibitive levels (see the following section for more discussion of this point). Second, there is the "own" trade weighting problem that has often been observed in the calculation of tariff averages. Products facing very high (or prohibitive)

Table 14. Air and Vessel Rates for Sub-Saharan African Countries Major Export Products to the United States

HS Code	Description	Exports (\$000)		Exports by Air		Exports by Vessel		All Exports	
		Air	Vessel	Freight Rate	African Margin	Freight Rate	African Margin	Freight Rate	African Margin
01	Live animals	4,538.6	0.0	20.2	3.1	.	.	20.2	3.5
03	Fresh or frozen fish	618.5	9,082.9	42.9	3.0	9.1	-1.6	11.2	-0.4
04	Dairy products and eggs	6,369.5	382.7	2.9	-1.5	7.3	1.0	3.1	-1.4
05	Animal parts and skins	246.4	66.9	5.8	-4.2	13.8	-1.6	7.5	-5.3
06	Live trees and plants	572.0	295.0	40.9	16.9	27.1	7.5	36.2	13.7
07	Edible vegetables and roots	47.3	749.1	92.6	41.4	30.3	7.5	31.9	7.3
08	Fresh or dried nuts and fruits	0.0	11,363.9	.	.	5.1	1.2	5.1	0.3
09	Coffee, tea and spices	1,702.7	100,012.9	3.2	-4.2	7.9	1.7	7.2	0.7
11	Products of milling industry	0.0	116.1	.	.	19.3	5.0	18.4	-3.7
12	Oil seeds and nuts	1,310.3	929.9	1.8	0.0	25.2	15.6	11.5	7.0
13	Raw vegetable suited for dyeing	16,391.3	11,186.9	2.5	-1.9	5.6	0.3	3.7	-1.2
14	Vegetable products	0.0	864.6	.	.	24.4	10.5	24.4	10.7
15	Animal and vegetable oils	0.0	603.9	.	.	9.8	1.0	9.9	0.4
16	Preserved foods	6.4	5,180.5	11.7	.	3.8	-2.4	3.8	-2.4
17	Sugars and sugar confectionery	0.0	27,010.7	.	.	12.4	2.0	12.4	2.3
18	Cocoa beans and chocolate	0.0	165,099.0	.	.	11.7	-0.8	11.7	-0.8
20	Preparation of vegetables	0.0	1,887.5	.	.	6.2	0.8	6.1	0.6
21	Miscellaneous prepared foods	0.0	845.6	.	.	6.3	2.4	6.3	0.1
22	Beverages	1.4	708.3	91.5	90.7	21.5	9.1	17.1	6.2
23	Animal feeds	0.0	2,966.5	.	.	56.1	20.9	56.1	20.9
24	Manufactured tobacco	9.4	88,003.3	50.2	0.0	14.5	8.5	11.2	5.8
25	Sulphur and related compounds	56.6	3,469.0	19.6	-1.8	20.2	5.7	19.7	4.8
26	Ores and concentrates	0.0	135,128.3	.	.	24.9	3.0	24.9	3.5
27	Mineral fuels and oils	0.0	293,483.0	.	.	9.5	1.3	9.5	1.2
28	Inorganic chemicals	1.6	10,584.0	10.8	6.7	5.1	1.2	4.1	0.7
29	Organic chemicals	1,390.0	192.0	1.1	-0.1	46.1	39.5	6.6	4.5
30	Pharmaceutical products	29.9	33.2	5.1	1.9	2.8	-6.4	5.1	3.4
31	Fertilizers	0.0	487.8	.	.	29.2	10.6	28.4	9.9
32	Tanning and dyeing extracts	113.9	221.8	30.2	28.7	13.4	8.4	16.4	12.1
33	Essential oils and resinoids	352.9	1,169.9	9.3	5.1	5.5	1.9	6.4	2.9
34	Soap and washing preparations	22.9	43.7	15.4	-3.8	7.0	-1.3	9.9	1.5
35	Glues and substances	620.5	336.2	5.4	-0.3	2.6	-0.8	4.4	-1.1
38	Miscellaneous chemicals	68.5	331.8	3.9	0.3	3.3	-2.3	3.4	-1.9
39	Artificial resins and plastics	35.0	603.2	6.7	-6.8	8.1	-0.7	7.6	-1.8
40	Natural and synthetic rubber	21.0	10,933.2	4.6	-6.2	11.0	0.7	10.9	0.6
41	Hides, skins and leather	1,897.3	7,384.4	5.3	-0.5	2.0	-1.5	2.6	-1.9
42	Articles of leather	457.4	726.9	12.7	0.8	3.5	-0.7	6.8	1.0
43	Furskins and artificial fur	371.7	72.1	9.4	3.7	10.1	6.0	10.1	4.4
44	Wood and wood articles	668.4	10,546.5	38.6	14.4	19.1	4.6	19.8	5.5
46	Manufactures of plaiting	212.1	342.5	47.0	10.3	22.5	0.5	31.9	9.9

48	Paper and paperboard	90.7	144.2	9.3	-11.9	11.5	3.2	10.6	2.4
49	Printed books and newspapers	75.6	138.3	23.3	13.7	8.2	4.3	12.5	8.0
50	Silk and waste silk	169.8	0.0	2.2	-1.7			2.2	-1.3
52	Fabrics of cotton	3,492.4	9,790.9	25.3	15.2	7.5	2.1	12.2	6.6
54	Flax and ramie	7.7	261.7	6.1	-4.8	4.2	0.3	4.2	-0.9
55	Cotton	73.9	329.1	33.3	27.8	5.2	1.2	10.4	5.8
56	Discontinuous man-made fibers	1.1	2,686.6	10.1	-58.3	19.2	10.1	18.5	9.3
57	Other textile materials	62.6	22.2	25.5	11.2	3.0	-1.2	17.1	9.8
61	Articles of apparel and clothing	3,926.9	78,761.1	16.3	5.2	5.7	2.1	6.2	0.6
62	Other textile articles	32,214.4	154,885.3	19.8	4.7	5.0	1.3	7.5	1.8
63	Old clothing and other textiles	161.8	1,375.8	46.9	30.9	4.7	0.5	9.1	4.0
64	Footwear	263.3	2,834.1	15.9	0.0	3.2	-0.7	4.3	-0.6
65	Headgear and parts	440.5	369.5	10.7	-2.0	6.8	-0.5	8.8	-1.3
66	Accessories like umbrellas	0.0	55.2			7.1	-0.7	7.1	-0.5
67	Skins of birds for wigs or beards	27.6	982.1	10.7	2.8	4.1	-2.1	4.3	-1.8
68	Articles of stone or plaster	247.1	1,679.6	45.8	29.9	13.4	0.5	17.5	5.1
69	Ceramic products	64.2	571.8	28.6	15.3	16.3	7.4	17.1	8.1
70	Glass and glassware	37.7	2,568.8	34.6	27.6	7.4	1.9	7.7	1.5
71	Pearls and precious stones	219,152.2	648.2	0.5	0.3	6.3	0.2	0.5	0.3
72	Ferrous products	0.0	23,137.7			4.5	-5.8	4.5	-5.8
73	Iron and steel	20.7	548.8	11.5	-10.7	7.2	0.5	7.3	-0.2
74	Copper and articles	128.9	30,000.9	14.2	2.7	3.9	1.3	4.0	1.0
75	Nickel and articles	0.0	8,489.4			3.1	1.1	2.9	0.9
76	Aluminum and articles	0.0	791.5			4.7	0.2	5.3	0.5
78	Lead and articles	0.0	447.6			8.1	2.4	8.1	-0.3
79	Zinc and articles	0.0	988.1			0.2	-5.1	0.2	-4.6
81	Other base metal products	71.4	45,864.5	14.0	11.0	0.8	0.1	0.6	-0.1
82	Tools and cutlery	25.7	166.6	4.2	-2.6	4.6	0.5	4.5	-0.1
83	Articles of base metal	192.1	285.1	26.5	12.6	13.1	6.4	17.4	11.0
84	Boilers and machinery appliances	3,348.8	1,029.9	2.5	-0.2	3.2	0.3	2.4	0.1
85	Electrical machinery	4,490.2	3,104.2	3.2	0.5	2.2	0.2	2.4	-0.7
87	Vehicles other than railways	3.6	1,060.8	14.1	-8.5	1.9	-2.1	1.8	-2.7
90	Scientific instruments	5,877.8	437.8	6.0	-0.2	1.1	-1.1	5.6	1.8
91	Clocks and watches	85.3	7.1	4.2	-5.2	23.7	15.4	6.6	3.0
92	Musical instruments	25.6	151.5	42.1	26.1	17.4	12.9	20.2	15.1
94	Furniture and parts	50.5	2,555.0	87.4	70.9	8.5	-1.2	10.8	1.0
95	Toys and games	520.1	912.9	11.0	-14.3	8.4	1.1	9.3	1.7
96	Miscellaneous manufactures	302.4	921.2	18.2	6.3	3.4	-0.6	7.0	1.6
97	Works of art	2,737.3	129.3	8.3	7.1	5.3	3.7	7.7	6.3
98	Special classification	16,119.8	5,909.0	3.7	2.6	8.5	5.3	3.8	2.4

transportation enter into the calculation of an average freight rate with low trade weights due to the restrictive effect of the transport costs.

Table 15 provides another perspective on the profile of transport costs facing all sub-Saharan countries exports as well as similar statistics for each regional group. Each groups nominal air and vessel freight rates for two-digit HS products were ranked in ascending order and the quartile values were computed along with these charges range. In addition, each group's median transport cost margin relative to competitors (positive values indicate an African disadvantage) is shown along with the margins range.

Overall, the statistics in Table 15 confirm that Africa generally is at an important (but not overwhelming) transport cost disadvantage relative to its competitors. For example, the median vessel nominal freight rate for "middle income West Africa" (10 percent) is approximately 2 percentage points above that paid by competitors. To put this margin in perspective the recently completed Uruguay Round achieved a 2.4 percentage point reduction in industrial country tariffs (to 3.9 percent). The other important points evident from Table 4 are that, in every instance, a larger adverse margin occurs for air freight than for vessel shipments. African air transport, at first glance, appears to be relatively less cost efficient than vessel.³² Finally, the third quartile values indicate that some African exports encounter very high transport costs. For example, 25 percent of sub-Saharan Africa's air exports incur freight rates exceeding 26 percent -- about one-quarter of Low Income West Africa's vessel shipments have nominal freight rates of more than 19 percent.

C. Effective Transport Protection Facing African Exports

It is recognized that nominal rates of protection may sometimes provide an inaccurate indication of the true importance of trade barriers (either tariffs, transportation costs, or nontariff restrictions). As such, many analyses involving these restrictions utilize the effective rate of protection (ERPs) concept. Effective rates measure the

³²There is a problem in the proper interpretation of these data since air freight shipments may go directly to interior U.S. markets, and therefore avoid some inland transport costs in both the importing and exporting country. Also, air freight may also allow some African countries to avoid costly internal land transport costs if the servicing airfields are located close to the centers of production. As such, the air-vessel margin may overstate the true difference in transport costs for these alternative modes of transport.

Table 15. Statistical Indices Relating to the Level, Distribution and Range in Regional African Countries' Exports to the United States in 1993.

African Region	Transport Mode	Nominal Freight Rate Level Distribution				African Margin (percentage points)	
		Quartile Values			Range	Median	Range
		First	Median	Third			
All Sub-Saharan Africa	Air	5.3	14.1	26.5	0.5 to 87.4	3.5	-13.9 to 71.2
	Vessel	4.6	7.5	13.8	0.2 to 56.1	1.1	-5.8 to 39.9
Low Income East and Southern Africa	Air	3.7	9.2	23.6	0.7 to 56.9	4.4	-11.9 to 44.9
	Vessel	4.2	7.1	13.8	0.2 to 55.9	1.2	-5.8 to 22.8
Low Income West Africa	Air	3.7	20.5	35.6	0.4 to 92.6	7.4	-0.9 to 41.5
	Vessel	3.5	9.3	19.4	0.2 to 89.7	1.1	-6.1 to 84.5
Middle Income East and Southern Africa	Air	2.5	8.0	16.4	0.9 to 29.7	0.9	-19.8 to 14.1
	Vessel	3.8	6.2	8.9	0.7 to 17.5	0.8	-4.3 to 7.0
Middle Income West Africa	Air	7.3	13.3	24.2	0.4 to 43.1	3.0	-18.8 to 20.4
	Vessel	4.9	10.0	12.8	2.3 to 50.6	1.9	-4.0 to 17.3
Oil Exporting Countries	Air	na	na	na	na	na	na
	Vessel	9.2	11.3	17.2	1.0 to 55.7	1.9	-7.2 to 29.6

Note: Trade Flows or less than \$50,000 have been excluded from the above comparisons. Insufficient data existed to make meaningful air freight comparisons for the African oil exporting countries.

Source: Nominal transport costs computed from United States Department of the Census trade tapes.

protection for value added in a production process while nominal rates show the protection for the final good. Stated differently, ERPs indicate the reduction in returns to productive factors (labor and capital) a foreign supplier must absorb in order to compete with domestic producers in the protected markets.³³ For example, if the effective rate of transport protection for a specific good is 10 percent African producers would have to reduce payments to domestic labor and capital that much below what these factors earn in the United States in order to export competitively. While some of the margin probably could be absorbed in the wage bill, the scope for doing so may be more limited than often thought due to relatively low African labor productivity, and to the fact that some African wages may be quite close to subsistence levels. Furthermore, the cost of capital in Africa is almost certainly to be considerably higher than in North America due to uncertainty and political instability. Given the profit maximizing objectives of many international firms even relatively low effective rates of transport protection, or small differences in transport ERPs within and outside the region, may reflect a major disincentive for the location of export oriented production activity in Africa.³⁴

Table 16 provides estimates of U.S. nominal and effective rates of transport cost protection facing African

³³For early formulations and applications of the concept of effective protection see Balassa (1965) or Basevi (1966). Grubel (1971) provides a useful nontechnical discussion of the concept. The effective rate of transport protection in the US against African exports of product j , (Et_j) can be calculated from a modification of the normal formula,

$$(3) \quad Et_j' = \frac{r_j - \frac{\sum_{i=1}^n a_{ij}' r_i}{\sum_{i=1}^n a_{ij}'}}{1 - \frac{\sum_{i=1}^n a_{ij}' r_i}{\sum_{i=1}^n a_{ij}'}}$$

where r_j is the nominal freight rate for African exports of product j to the United States, r_i is the average freight rate on all U.S. imports of product i used in the production of j , and a_{ij}' is the observed Leontief coefficient. Following Waters (1970) we utilized the observed production coefficients (and not the theoretically preferable zero transport cost coefficient). As a result, our ERP estimates will be downward biased. The information on production coefficients was drawn from the U.S. Census of Manufactures.

³⁴The influence of even small variations in international transportation costs on the location of global production may not receive adequate recognition. For example, in a Nobel Symposium on the location of international economic activity Assar Lindbeck argued that "given other costs, firms chose between alternative international locations in order to minimize transport costs. These costs, therefore, may become low precisely because they have been highly important for location -- high transport cost locations are avoided if other costs are equal". Similarly, Jagdish Bhagwati observed that "even if transport costs for any alternative location were a small proportion of total product price, they could still affect location if they varied geographically more than other costs of production". See (Ohlin et. al. 1977, p. 276).

exports of processed products for which required production and trade data were available. Considerable variation is evident as the transport ERPs range from about 7 percent for electrical machinery to over 90 percent for animal feeds. This degree of variation suggests that freight costs will play an important role in determining the specific types of products Africa might export successfully. Another noteworthy point is that some relatively modest nominal freight rates conceal very high effective rates of protection -- for 6 of the 30 product groups the effective rates are more than double the nominal rate of protection. An extreme situation occurs for animal and vegetable oils where the transport ERP (56 percent) is more than 5 times higher than the corresponding nominal rate.³⁵ While Africa is an important producer of several types of oilseeds, like groundnuts and copra, that might be further processed for export, this activity almost certainly is constrained by the amount that local value added would have to be reduced to offset the effects of transport costs.

As previously noted, many developing countries have a strong interest in pursuing resource based industrialization strategies to facilitate their industrialization and growth and it is often held that tariff escalation in their major markets is an important obstacle to expansion of commodity processing. In this context, the results in Table 16 assume special importance since effective transport rates exceed nominal freight rates for 28 of the 30 processed products. The properties of the ERP index are such that this will occur only when the average rates of (transport) protection for production inputs are lower than that for the final product (i.e., the rates increase or escalate with additional fabrication). As such, the statistics in Table 16 shows international freight costs generally are structured in a way that works against the local processing of domestically produced African commodities.³⁶

³⁵Since the ERP measures the percentage difference between value added in the presence of protection, and without trade barriers, relatively low nominal freight costs can produce quite high effective rates of protection for low value added products. That is, as equation (3) shows, the value added coefficient is the base for the ERP calculation and when this term takes relatively small values (say 10 to 15 percent as is the case with some vegetable oil products) quite high effective rate indices can result. Empirical studies show that production coefficients are generally quite similar across countries. However, if they are significantly different for some African products the results would be affected.

³⁶Tariff or transport cost escalation is held to exist when these charges increase, for a specific exporting country or group of countries, as the goods shipped experience further processing. Since the ERP calculations shown in Table 5 are based on: (i) nominal freight rates for African exports of processed products; and (ii) average nominal rates for the production inputs from **all foreign sources**, it describes a different situation. The latter is employed since it shown the margin by which domestic United States producers of the inputs may raise local prices and not be displaced by competing foreign suppliers.

Table 16. 1993 Nominal and Effective Rates of Transportation Protection Against African Exports of Processed Goods to the United States.

HS Code	Description	U.S. Value Added Coefficient	Nominal Transport Protection (%)	Effective Transport Protection (%)	Difference
11	Products of the milling industry	0.22	18.4	33.0	14.6
14	Vegetable products	0.38	24.4	36.1	11.7
15	Animal and vegetable oils	0.08	9.9	56.1	46.2
20	Preparations of vegetables	0.41	16.1	28.2	12.1
23	Animal feeds	0.52	56.1	87.2	31.1
24	Cured tobacco	0.10	11.2	32.3	21.1
31	Fertilizers	0.29	28.4	62.9	34.5
32	Tanning and dying extracts	0.66	16.4	20.4	4.0
34	Soap and cleansing preparations	0.52	9.9	12.1	2.2
42	Articles of leather	0.49	6.8	9.3	2.5
46	Manufactures of plaiting materials	0.42	31.9	62.6	30.7
48	Paper and paperboard	0.43	10.6	8.3	-2.3
52	Fabrics of cotton	0.41	12.2	16.9	4.7
56	Discontinuous man-made fibers	0.35	18.5	33.6	15.1
57	Other textile materials	0.55	17.1	24.1	7.0
61	Articles of apparel and clothing	0.56	6.2	14.5	8.3
64	Footwear	0.48	4.3	3.2	-1.1
65	Headgear and parts	0.56	8.8	12.1	3.3
68	Articles of stone or plaster	0.53	17.5	26.6	9.1
69	Ceramic products	0.58	17.1	22.8	5.7
70	Glass and glassware	0.64	7.7	10.2	2.5
73	Iron and steel	0.53	7.3	12.1	4.8
82	Tools and cutlery	0.60	6.9	8.1	1.2
83	Articles of base metal	0.34	17.4	36.8	19.4
85	Electrical machinery	0.56	2.4	7.1	4.7
90	Scientific instruments	0.68	5.6	7.7	2.1
91	Clocks and watches	0.40	6.6	11.2	4.6
92	Recorders and musical instruments	0.54	20.2	34.2	14.0
94	Furniture and parts	0.53	10.8	18.6	7.8
95	Toys and Games	0.58	9.3	16.3	7.0
	AVERAGE ALL ABOVE PRODUCTS	0.46	14.5	25.5	11.0

Source: Value added coefficients and effective rate estimates based on data drawn from the US Department of Commerce, Census of Manufactures. Nominal transport costs computed from Department of Commerce trade tapes.

E. Transport Costs: The Potential Policy Dimension

Two key questions relating to the present analysis are: (i) what factors account for the adverse African transport costs; and (2) what types of corrective policy measures might be employed to deal with them. While the question needs further in depth investigation evidence suggests (see Box 6) that the anti-competitive cargo reservation policies adopted by most African governments have had an important adverse influence on freight costs.³⁷ Recognition of the true effects of these anticompetitive measures carries with it the policy prescription for corrective action -- deregulation. World Bank studies for other regions show that deregulation, and the promotion of measures to stimulate competition for shipping services may reduce freight rates in the liner trades by as much as 50 percent (see, for example, Bennathan et. al. 1989).

This report showed that international transport costs constitute a major barrier to African exports and more information is needed on these charges level and incidence -- particularly in the European Union and Japan. Customs officials in these markets should assist African countries and concerned international organizations by making existing information available and to improve procedures for the future collection, processing and tabulation of information on international transport costs.

A final point to note is that numerous investigations show that governments and traders generally have far more policy options for reducing transport costs than is generally recognized (UNCTAD 1975, Yeats 1985). These options cover such measures as cargo bulking to achieve transport economies of scale in transport, rationalization of shipping services and improved scheduling for liners, adoption of procedures to speed vessel turnaround, utilization of potentially lower cost tramp services where feasible, development or improvement of coastal feeder services, unitization and the adoption of new transport technologies, promotion of shippers associations, or port and

³⁷An OECD (1992, p. 43) provides a description of these anti-competitive practices and the current situation regarding shipping in Africa in West and Central Africa. "In 1992, West and Central African states showed no indication of liberalizing their protectionist shipping policies based largely on the unilateral interpretation of certain provisions of the UN Liner Code Convention. On the contrary there were various moves towards enacting existing, but not yet implemented restrictive policies. These attempts met with opposition by OECD member countries and their shipping lines which considered this as both protectionist and discriminatory. However, the operation of some 50 shipping lines offering regular services to West Africa from most ports of the world was not only hampered by protectionism. Civil unrest, economic depression, a sharp increase in criminal activities towards vessels together with poor port management and severe and often discriminatory customs regulations were factors shipping lines had to struggle with.

Box 7
Cargo Reservation Legislation in West Africa

To promote national fleets, and to counter perceived problems with the existing liner conference system, many African countries employ cargo reservation schemes such as those in UNCTAD's Code of Conduct for Liner Conferences. Article 2(4a) of the Code states "the group of national shipping lines of each of the two countries the foreign trade between which is carried by the conference shall have equal rights to participate in the freight and volume of traffic generated by their mutual foreign trade". Section 4(b) further stipulates that "Third country shipping lines, if any, shall have the right to acquire a significant part, say as much as 20 percent, in the volume of traffic generated by that trade". Developing countries interpret this to mean conference cargo be allocated on the basis of 40-40-20 – that is, 40% reserved for the lines of the exporter, 40% is reserved for the importer, and 20 percent is subject to open competition. The following schemes were adopted in West Africa by the early 1990s.

Country	Legislation and Government Orders
Angola	--March 1976 decree gives priority to national line for imports and exports. Use of foreign flag vessel only with waiver from the government.
Benin	--Ordinance No. 49 and Decree No. 240 of 13/9/79 require cargo sharing on a 40-40-20 basis (whole trade. But inter-ministerial Order of 14/5/84 requires ships operated or chartered by COBENAM (national line) to have priority to all cargo and requires submission of freight manifests. Waivers granted where national flag unavailable. --Decree No. 709 of 13/10/75 and Order No. 39 of 16/1/76 reserve government cargo to CAMSHIP (state line) unless 40-40-20 agreement divides the whole trade. Order No. 317 of 1977 requires all conferences to negotiate rates with the Cameroon National Shippers Council. --Decree No. 83/045 of 22/1/85 divides conference trade on a 40-40-20 basis. --Law No. 75-940 of 26/12/85; Decree No. 617 of 3/9/75; and Decree No. 576 of 25/8/77 apply 40-40-20 principle to both conference and non-conference cargoes, including bulk and other goods. --Decree No. 54 of 7/9/78 introduces 40-40-20 division of the trade. --The Ghana Shippers Council Amendment Law 1987 and Cargo Sharing Regulation 1987 extend the 40-40-20 principle to all cargoes (merchandise and bulk) and reserves to the Shippers Council and national line (Black Star Line) control over the allocation of these cargoes. --National maritime law stipulates the 50% of strategic exports like bauxite must be carried by the state line, Societe Navale Guineenne, GUNOMAR, and the West African Bulk Shipping Inc. --The Code de la Marine Marchand et des Perches Maritimes, Law 78.430, Nouakchott, 28 February 1978, applies the 40-40-20 principle.
Guinea	--Decree No. 13 of 1978 establishes the Nigerian Shippers' Council, while the National Shipping Policy Decree 10 of May 1987 applies the 40-40-20 principle. It, however, goes beyond this principle to share all non-conference and bulk cargoes on a 50-50 basis. The Decree also reserves to the National Maritime Authority control over the allocation of all export cargoes.
Mauritania	--Decree 179 of 2/3/78 and Order 454 of 25/7/80 apply 40-40-20 to all cargoes.
Nigeria	--Decree No. 8 of 9/1/80 and Order No. 4 of 19/2/80 apply the 40-40-20 principle to all trade.
Senegal	--Ordinance No. 256 of November 1980 and 192 of December 1982 as implemented by Decree No. 1 of 17/1/83, apply the 40-40-20 principle to all cargoes and grant the Zaire Office of Maritime Freight Management extensive powers including the fixing of freight rates
Togo	
Zaire	

Although little evidence exists that cargo reservation has promoted African fleet development, other studies show that its anti-competitive effects may have a significant adverse effect on importers and exporters freight costs (Theureau, 1992). In fact, studies show that freight rates may fall by as much as 50 percent when reservation schemes are abandoned and transport is subject to free and open competition (Bennathan, 1989). In short, the available evidence shows that the adverse African freight rates reported in this study are, at least in large part, due to inappropriate national transport policies pursued by African governments.

storage improvements to name a few. The precise corrective measures will require detailed analyses of African transport costs and systems at the country or regional level. This study's findings accent the importance of further analysis in this direction.

In the interim, several OECD policy initiatives could help alleviate Africa's international transport problems:

- **Technical assistance.** International shipping has undergone a major transformation in which procedures for cargo unitization, port operations, and related logistical functions have evolved into highly complex operations requiring a considerable degree of technical expertise. Since most African countries have limited access to such expertise, technical assistance programs (such as those provided by UNCTAD and the World Bank) should be expanded and also extended to related activities (such as customs clearance procedures) that impinge on the efficiency of international transport operations.

- **Finance and development.** Due to insufficient attention and funds, many African countries' fleets, ports, and connecting inland transport infrastructure have deteriorated, or have become technologically outmoded. OECD countries should sponsor a comprehensive survey and report on sub-Saharan Africa's transport problems along with policy proposals for their alleviation. Given the small size of many African countries, and its influence on cargo volumes and the utilization of efficient transport technologies, further attention should be given to the development of regional ports and required inland infra-structure.

- **The situation of land-locked African countries** needs special attention given the major problems these countries face in transitting their neighbor's territories. A major effort should attempt to identify the special trade problems of the land-locked African countries and formulate policy suggestions for their reduction.

VI. Summary and Conclusions

With regard to the importance of OECD countries' tariffs, the key finding of this report is that these charges have not been a major factor accounting for Africa's poor trade performance, although some specific goods like textiles and clothing face relatively high import duties in some markets. In fact, once preferences are taken into account tariffs conveyed significant competitive advantages over competing goods shipped from some other countries, and were likely a positive factor for the location of commodity processing in Africa as opposed to some other foreign locations. Africa may experience some losses due to the Uruguay Round erosion of these preferences, but their magnitude should not be large.

As was the case with tariffs, nontariff barriers do not provide an important general explanation for Africa's poor trade performance although these restrictions were important for some specific types of agricultural products like beef and sugar. Also, this will change significantly in the near future since a major accomplishment of the Uruguay Round relates to agreements that were reached on nontariff barriers. All NTBs imposed under the Multifiber Arrangement (MFA) will be phased out over a ten year period (Mauritius, Kenya and to a lesser extent Nigeria were the only African countries facing these restrictions) as will all "voluntary" export restraints (none of which were applied to Africa). OECD countries' nontariff barriers on agricultural goods will be converted to tariffs and then reduced by an average of 36 percent. Agreement was also reached on limiting subsidies and other incentives to support agricultural exports.

These achievements will markedly change the profile of OECD nontariff protection facing Africa. Formerly, about 11 percent of sub-Saharan Africa's non-fuel exports faced NTBs -- this ratio will fall to about 3 percent because of the Uruguay Round. For some African countries the changes will be dramatic. Pre-Uruguay Round NTBs covered more than 60 percent of Mauritius' exports -- this ratio will fall to about 2 percent as a result of the Round. Formerly, 83 percent of Reunion's exports faced NTBs and this ratio will drop to zero. However, some African countries will be largely unaffected by the Uruguay Round's accomplishments. No NTBs on energy products were liberalized so the coverage ratios for countries like Angola, Congo and Nigeria will remain relatively high. Exclusion of fish from the Round's agreement on agriculture limited the benefits to countries like the Seychelles that specialize in these exports. Others simply faced no (or few) nontariff restrictions prior to the trade

negotiations.

While there is a (correct) tendency to regard these developments as being positive from the viewpoint of all developing countries as a group, some may incur losses. Trade in textiles and clothing has been rigidly controlled over the last three decades through the use of quotas imposed under the Multifiber Arrangement. The phase out of these restrictions over a 10 year period *will subject African exports to aggressive international competition*. The ability of many African countries to maintain a viable textile and clothing export sector depends on their capacity to implement necessary reforms aimed at achieving cost competitiveness. The fact that the MFA liberalization is so heavily backloaded (roughly one-half of the restrictions will be removed at the end of a ten year period) provides ample time for adjustments to be implemented. In any event, losses of market share for textiles and clothing need not be an accurate indication as to the impact on welfare -- particularly if African exports are heavily subsidized. Africa may also face more vigorous competition on products like footwear and ferrous metals, where exports from some other developing countries were formerly restrained by "voluntary" restraints which were eliminated by the Round.

Any assessment of these likely future development must recognize that policy options are available to combat potential losses. Probably one of the most promising of these involves reforms in the African countries' own trade regimes. Detailed statistics compiled by UNCTAD (1987) on developing countries trade barriers show that African tariffs are generally far higher than average, and that their trade regimes are often NTM-ridden. Extensive studies by the World Bank (see Thomas and Nash, 1991) document the important economic gains that can result from trade policy reform and it appears that such reform could have a major positive impact in Africa. In short, the best response to an erosion of trade preferences in foreign markets would appear to be an aggressive liberalization of African countries own trade barriers.

As far as "unfinished" business is concerned, further initiatives are needed to address NTBs facing energy products, fish and chemicals since these were largely bypassed by the Round. Since little information is now available on their trade impact, efforts should be made to estimate the levels of protection afforded by the post-Uruguay NTBs (as was done previously in the "tariffication" exercise for agriculture). These NTB nominal equivalents could be helpful in establishing priority sectors for post-Uruguay Round action. Also, there is a need

for stricter regulations on the use of OECD antidumping duties and safeguards to ensure that these forms of protection are not substituted for those that were eliminated. However, a very large part of the unfinished business involves reforms in the African countries themselves to ensure they can react to the new export opportunities and competitive challenges resulting from the Uruguay Round.

In contrast to the relatively minor role of tariffs and NTBs, this study concluded that transport costs have a significant negative impact on African exports, or the location of manufacturing activity in Africa, which is more important than generally recognized. Freight rates for African exports often are considerably higher than those on similar goods originating in other countries, and these charges often conceal very high rates of effective protection for processed goods -- a point that significantly reduces incentives for new investment in export oriented production activities. This combination of factors clearly limits African countries' ability to fully utilize natural resource based industrialization strategies in their development process. A related disturbing finding is that African net payments for transport services is very high relative to other developing countries and has actually increased over the last two decades. As a result, a large share of foreign exchange earnings that might have otherwise been employed in productive capacity building investments is being diverted to payments for transport.

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Statistical Annex 1

Transportation Costs for Regional Groups of African Countries

The statistics presented in this appendix provide information on international transportation and insurance costs for five regional African country groups (i.e., Low Income East and Southern Africa; Low Income West Africa; Middle Income East and Southern Africa; Middle Income West Africa; African Oil Exporting Countries) and the Republic of South Africa's exports to the United States. The data are based on 1993 tariff line level trade statistics compiled by the United States which have been aggregated to the two-digit level of the Harmonized System. In addition, where some consignments within a two-digit group have been shipped by air, and others by vessel, nominal freight costs for both transport modes have been computed and are reported separately.

The statistics in Appendix Tables 1 through 6 show an "African transport cost margin." These figures reflect the differences between the freight costs paid by African countries and those paid by every other exporter (except Mexico and Canada) of the same underlying tariff line products. Positive values for the freight margins indicate African freight costs are that much higher than their competitors (in percentage points) while negative values indicate Africa's costs are lower than average.

To avoid any unusual results associated with small and atypical consignments, information is not shown in cases where the total exports in the harmonized product group fell below \$50,000. Finally, it should be noted that the statistics reported in the following tables include items like re-exports, returned goods, and goods that may have been originally produced outside the African region. These categories of products could not be identified separately in the underlying trade and transport cost database employed for the analysis.

Appendix Table 1. Air and Vessel Freight Rates for Low Income East and Southern Africas Major Export Products to the USA

HS Code	Description	Exports(\$000)		Exports by Air		Exports by Vessel		All Exports	
		Air	Vessel	Freight Rate	African Margin	Freight Rate	African Margin	Freight Rate	African Margin
01	Live animals	928.2	0.0	35.7	21.7	.	.	35.7	21.7
03	Fresh or frozen fish	244.0	1,065.7	56.9	-2.0	5.6	-4.6	15.2	2.5
05	Animal parts and skins	211.9	66.9	4.0	-1.4	13.8	-1.6	6.4	-5.5
06	Live tree and plants	313.6	286.5	49.8	21.8	27.2	7.4	38.9	14.5
07	Edible vegetables and roots	0.0	127.8	.	.	18.8	1.5	14.3	-3.6
08	Fresh or dried nuts and fruits	0.0	8,133.4	.	.	5.6	2.0	5.5	1.9
09	Coffee, tea and spices	1,701.1	87,535.4	3.2	-4.2	6.4	0.4	5.7	-0.6
12	Oil seeds and nuts	1,287.2	824.5	1.7	0.1	26.4	17.1	11.4	7.2
13	Raw vegetable suited for dyeing	16,390.0	10,470.3	2.5	-1.9	5.8	0.4	3.7	-1.2
14	Vegetable products	0.0	834.5	.	.	23.5	10.2	23.5	10.4
15	Animal and vegetable oils	0.0	362.1	.	.	4.1	-2.1	4.1	-2.2
17	Sugars and sugar confectionery	0.0	4,570.9	.	.	12.6	2.7	12.6	3.1
18	Cocoa beans and chocolate	0.0	294.1	.	.	13.3	0.7	13.3	0.7
20	Preparations of vegetables	0.0	1,680.9	.	.	5.7	1.2	5.7	1.2
21	Miscellaneous prepared foods	0.0	533.3	.	.	4.2	0.9	4.2	-2.6
22	Beverages	1.4	72.9	91.5	90.7	35.4	22.6	21.5	11.5
23	Animal feeds	0.0	1,576.3	.	.	55.9	16.1	55.9	16.1
24	Manufactured tobacco	9.4	85,101.2	50.2	0.0	14.8	8.8	11.3	6.0
25	Sulphur and related materials	40.4	3,448.8	18.1	-2.5	20.3	5.7	18.7	5.2
26	Ores and concentrates	0.0	5,551.0	.	.	1.8	0.1	1.8	0.1
27	Mineral fuels and oils	0.0	137,817.3	.	.	8.7	1.0	8.7	0.8
28	Inorganic chemicals	1.6	2,615.3	10.8	6.7	0.9	-0.9	0.9	-0.9
29	Organic chemicals	0.0	92.2	.	.	2.0	-4.0	2.0	-4.1
32	Tanning and dyeing extracts	113.9	213.1	30.2	28.7	13.8	8.7	16.6	12.3
33	Essential oils and resinoids	345.2	607.7	9.2	4.9	6.7	2.4	7.6	3.8
34	Soaps and detergents	9.1	0.0	1.4	-3.1	.	.	1.4	-0.6
35	Glues and substances	620.5	0.0	5.4	-0.3	.	.	5.4	1.2
38	Miscellaneous chemicals	68.5	0.0	3.9	0.3	.	.	3.9	0.3
39	Artificial resins and plastics	23.7	61.8	2.7	-9.3	4.9	-2.9	4.3	-4.1
40	Natural and synthetic rubber	21.0	31.9	4.6	-6.2	5.9	0.0	5.4	-0.6
41	Hides, skins and leather	635.8	7,384.4	11.2	2.9	2.0	-1.5	2.6	-2.0
42	Articles of leather	274.0	377.3	11.8	2.2	2.9	-1.7	6.7	0.7
43	Furskins and artificial fur	140.6	0.0	12.6	8.4	.	.	17.3	12.4
44	Wood and wood articles	344.8	2,568.8	39.5	14.4	12.1	0.7	14.7	2.3
46	Manufactures of plaiting	199.4	253.0	46.4	10.3	22.5	1.0	33.1	11.5
48	Paper and paperboard	90.7	83.4	9.3	-11.9	10.2	-0.4	9.8	1.0
49	Printed books and newspapers	51.5	1.7	19.5	9.5	7.3	2.1	19.1	14.4
50	Silk and waste silk	167.0	0.0	2.2	-1.7	.	.	2.2	-1.3
52	Fabrics of cotton	8.9	6,374.8	50.2	40.5	8.6	2.6	8.7	2.8
56	Discontinuous man-made fibers	1.1	2,686.6	10.1	-58.3	19.2	10.1	18.5	9.3
61	Articles of apparel and clothing	1,210.7	33,666.5	17.9	7.4	4.8	1.4	5.2	-0.2
62	Other textile articles	10,282.4	51,676.1	26.3	10.5	4.5	0.9	8.1	2.6
63	Old clothing and other textiles	34.2	1,011.3	32.3	18.1	4.7	0.5	5.6	0.6

64	Footwear	145.4	12.3	11.7	-5.4	3.9	0.0	11.1	4.6
65	Headgear and parts	424.0	118.9	9.7	-2.8	3.8	-3.4	8.4	-3.1
66	Accessories like umbrellas	0.0	55.2			7.1	-0.7	7.1	-0.5
68	Articles of stone or plaster	247.1	1,676.3	45.8	29.9	13.4	0.5	17.5	5.1
69	Ceramic products	10.8	88.3	38.6	30.3	32.3	20.9	30.4	19.7
70	Glass and glassware	1.5	1,796.2	48.5	29.0	8.6	2.6	8.6	1.8
71	Pearls and precious stones	61,210.5	476.5	0.7	0.4	7.7	1.4	0.8	0.4
72	Ferrous products	0.0	23,137.7			4.5	-5.8	4.5	-5.8
73	Iron and steel	18.5	188.4	11.9	-12.0	9.4	2.4	9.6	1.9
74	Copper and articles	13.9	29,979.4	36.7	24.9	3.9	1.3	3.9	1.0
75	Nickel and articles	0.0	8,411.2			2.9	0.9	2.7	0.8
79	Zinc and articles	0.0	988.1			0.2	-5.1	0.2	-4.6
81	Other base metal products	71.4	45,853.5	14.0	11.0	0.8	0.1	0.6	-0.1
82	Tools and cutlery	20.8	105.3	4.7	-2.9	3.7	-0.2	3.8	-0.7
83	Articles of base metal	87.1	14.5	20.8	5.7	23.7	15.1	17.4	10.8
84	Boilers and machinery appliances	653.0	368.1	3.8	1.4	4.9	1.1	4.2	1.7
85	Electrical machinery	1,497.2	1,253.9	2.3	-0.2	2.8	0.6	2.6	-1.2
90	Scientific instruments	71.8	7.5	3.0	1.2	2.7	0.3	2.9	1.1
92	Recorders and musical instruments	7.2	53.2	36.6	30.4	17.5	13.0	19.8	14.9
94	Furniture and parts	9.7	201.1	78.2	54.7	16.1	6.3	18.0	8.1
95	Toys and games	120.8	96.0	12.4	2.5	9.9	3.4	10.6	5.4
96	Miscellaneous manufactures	201.5	65.8	19.5	9.0	10.5	2.9	17.3	9.0
97	Work of art	1,414.0	113.6	10.2	9.1	4.6	3.3	9.6	8.4
98	Special classification	6,879.5	134.6	3.6	2.6	3.5	0.2	3.6	2.3

Appendix Table 2. Air and Vessel Freight Rates for Low Income West Africas Major Export Products to the United States

HS Code	Description	Exports (\$000)		Exports by Air		Exports by Vessel		All Exports	
		Air	Vessel	Freight Rate	African Margin	Freight Rate	African Margin	Freight Rate	African Margin
01	Live animals	1,599.0	0.0	20.5	9.4	.	.	20.5	9.4
03	Fresh or frozen fish	83.8	7,228.7	34.4	10.0	9.4	-1.9	9.6	-1.7
07	Edible vegetables and roots	47.3	589.4	92.6	41.4	31.6	7.7	35.7	9.2
09	Coffee, tea and spices	0.0	407.4	.	.	8.2	-0.5	8.2	-1.1
11	Products of milling industry	0.0	72.3	.	.	21.9	6.7	21.9	6.7
12	Oil seeds and nuts	0.0	74.0	.	.	19.3	4.8	19.3	5.3
13	Raw vegetable suited for dyeing	0.0	573.8	.	.	2.2	-1.9	2.2	-2.3
15	Animal and vegetable oils	0.0	123.0	.	.	20.9	8.0	21.1	6.8
16	Preserved foods	0.0	4,597.3	.	.	3.8	-2.9	3.8	-2.9
17	Sugar and sugar confectionery	0.0	92.1	.	.	3.3	-3.1	3.3	-3.3
18	Cocoa beans and chocolate	0.0	52,855.5	.	.	11.8	-1.1	11.8	-1.1
20	Preparations of vegetables	0.0	108.6	.	.	10.8	-0.1	10.8	-0.1
22	Beverages	0.0	82.1	.	.	32.6	19.6	32.6	19.4
23	Animal feeds	0.0	619.1	.	.	63.5	36.9	63.5	36.9
24	Manufactured tobacco	0.0	815.0	.	.	2.8	-1.8	9.2	-3.5
26	Ores and concentrates	0.0	129,534.7	.	.	25.9	3.1	26.0	3.7
27	Mineral fuels and oils	0.0	38,254.7	.	.	9.9	1.0	9.9	0.9
28	Inorganic chemicals	0.0	4,758.9	.	.	10.0	3.5	10.0	3.6
29	Organic chemicals	1,250.0	91.3	1.3	0.1	89.7	84.5	7.2	5.6
31	Fertilizers	0.0	482.4	.	.	28.9	10.3	28.7	10.2
35	Glues and substances	0.0	133.9	.	.	2.0	-2.1	2.0	-12.4
38	Miscellaneous chemicals	0.0	331.8	.	.	3.3	-2.3	3.3	-2.4
39	Artificial resins and plastics	1.9	276.8	26.1	-0.1	7.8	-1.0	7.9	-1.4
40	Natural and synthetic rubber	0.0	745.3	.	.	11.6	0.6	11.6	0.6
44	Wood and wood articles	229.5	2,325.5	36.8	13.4	24.6	8.0	25.6	9.4
49	Printed books and newspapers	6.8	100.6	5.6	2.6	10.0	6.2	9.5	5.4
52	Fabrics of cotton	1,111.4	1,289.3	29.3	19.3	6.0	1.2	16.8	11.7
55	Cotton	73.9	94.4	33.3	27.8	3.4	0.3	17.0	12.4
62	Other textile articles	705.9	1,314.5	14.4	-2.5	9.3	5.2	11.1	4.3
63	Old clothing and other textiles	117.8	18.1	51.4	34.7	11.1	5.1	46.0	39.5
64	Footwear	1.1	900.4	98.7	82.9	4.4	-0.2	4.5	-0.7
67	Skins of birds for wigs or beards	22.0	136.0	5.2	-2.8	0.2	-6.1	0.9	-5.1
70	Glass and glassware	31.3	457.5	36.7	30.1	2.7	-0.9	4.8	0.7
71	Pearls and precious stones	145,497.0	9.6	0.4	0.3	19.9	15.4	0.4	0.3
73	Iron and steel	0.0	173.7	.	.	6.8	-0.4	6.8	-2.1
76	Aluminum and articles	0.0	783.1	.	.	4.7	0.2	4.6	0.0
84	Boilers and machinery appliances	245.6	406.7	4.6	-2.3	2.6	-0.1	2.0	-1.1
85	Electrical machinery	105.9	69.9	2.7	-0.5	3.5	1.5	1.3	-1.8
87	Vehicles other than railway	0.0	62.2	.	.	7.5	3.6	7.5	2.6
92	Recorders and musical instruments	11.0	56.8	48.4	29.6	19.4	14.7	24.1	19.0
94	Furniture and parts	0.0	364.6	.	.	5.4	-3.5	5.4	-3.8
95	Toys and games	25.8	64.8	5.9	-7.9	10.7	3.4	9.4	2.4
97	Works of art	324.0	4.5	2.3	0.6	7.8	5.8	1.7	0.2
98	Special classification	4,156.0	1,219.1	4.9	4.4	1.9	-1.3	2.3	1.2

Appendix Table 3. Air and Vessel Freight Rates for Middle Income East and Southern Africas Major Export Products to the USA

HS Code	Description	Exports (\$000)		Exports by Air		Exports by Vessel		All Exports	
		Air	Vessel	Freight Rate	African Margin	Freight Rate	African Margin	Freight Rate	African Margin
01	Live animals	1,442.1	0.0	15.1	-7.6	.	.	15.1	-7.4
03	Fresh or frozen fish	30.8	786.4	31.4	-22.6	11.0	5.8	11.5	4.2
04	Dairy products and eggs	6,369.5	350.9	2.9	-1.5	7.0	0.9	3.1	-1.4
06	Live tree and plants	252.2	0.0	29.5	10.6	.	.	29.5	11.6
09	Coffee, tea and spices	0.0	1,759.7	.	.	4.7	-1.2	4.7	-0.9
12	Oil seeds and nuts	23.2	13.9	8.3	-4.9	6.3	-1.1	7.6	-2.9
16	Preserved foods	6.4	583.2	11.7	.	3.8	0.8	3.8	0.5
17	Sugars and sugar confectionery	0.0	17,105.0	.	.	12.2	1.6	12.3	2.0
27	Mineral fuels and oils	0.0	2,894.7	.	.	12.2	5.2	12.2	5.2
28	Inorganic chemicals	0.0	3,209.8	.	.	1.3	-0.7	0.9	-0.7
33	Essential oils and resinoids	0.0	62.3	.	.	4.8	1.9	4.7	1.6
35	Glues and substances	0.0	202.3	.	.	3.0	-0.4	3.0	-0.5
39	Artificial resins and plastics	4.6	130.6	19.1	2.0	11.9	4.2	9.8	0.6
41	Hides, skins and leather	1,160.9	0.0	2.2	-2.5	.	.	2.2	-1.6
42	Articles of leather	1.4	143.5	58.2	52.9	2.1	-3.2	2.6	-3.8
43	Furskins and artificial fur	231.1	72.1	7.5	0.9	10.1	6.0	8.1	2.3
44	Wood and articles of wood	9.2	102.3	9.9	-12.9	17.5	7.2	16.8	6.1
47	Paper making material	0.0	1,746.2	.	.	12.1	0.7	12.1	0.7
54	Flax and ramie	0.0	188.9	.	.	4.8	1.1	4.8	-0.7
55	Cotton	0.0	234.6	.	.	5.9	1.6	5.9	1.4
57	Other textile materials	53.6	0.0	27.9	14.2	.	.	27.9	21.5
61	Articles of apparel and clothing	2,660.0	45,033.7	15.6	4.3	6.4	2.6	6.9	1.3
62	Other textile articles	20,996.1	101,818.4	16.8	2.1	5.2	1.5	7.2	1.4
63	Old clothing and other textiles	3.9	344.6	14.9	6.5	4.3	0.3	4.4	-0.4
64	Footwear	33.9	683.0	9.8	-1.2	2.7	-0.7	3.0	-1.2
65	Headgear and parts	9.2	189.4	28.6	5.6	8.4	0.8	9.3	1.4
69	Ceramic products	47.9	22.7	21.9	7.5	11.7	2.3	15.8	5.3
70	Glass and glassware	4.8	315.1	16.6	10.8	7.4	1.9	7.2	1.1
71	Peals and precious stones	9,334.2	162.1	0.9	0.2	1.3	-4.3	0.9	0.2
73	Iron and steel	0.0	135.8	.	.	4.0	-1.5	4.0	-1.8
74	Copper and articles	101.2	0.0	8.0	-3.2	.	.	8.0	1.4
78	Lead and articles	0.0	447.6	.	.	8.1	2.4	8.1	-0.3
83	Articles of base metal	0.0	184.7	.	.	12.6	5.2	12.6	5.0
84	Boilers and machinery appliances	2,029.3	244.7	1.7	-0.3	1.8	-0.3	1.6	-0.4
85	Electrical machinery	1,954.8	1,539.2	1.5	-0.8	1.3	-0.4	1.3	-0.6
87	Vehicles other than railway	0.0	518.1	.	.	0.7	-1.9	0.7	-2.6
90	Scientific instruments	5,758.3	374.8	6.0	-0.3	0.9	-1.3	5.7	1.9
94	Furniture and parts	36.0	1,836.5	96.1	81.3	8.3	-1.5	10.9	1.1
95	Toys and games	295.6	372.7	10.1	-20.6	8.5	0.9	9.2	0.8
96	Miscellaneous manufactures	93.3	776.1	16.0	1.5	1.8	-1.7	3.3	-1.0
97	Works of art	661.5	9.2	2.2	1.4	12.4	8.4	2.3	0.9
98	Special classification	4,485.3	1,341.5	2.7	1.0	6.2	3.4	2.7	0.8

Appendix Table 4. Air and Vessel Freight Rates for Middle Income West Africas Major Export Products to the United States

HS Code	Description	Exports (\$000)		Exports by Air		Exports by Vessel		All Exports	
		Air	Vessel	Freight Rate	African Margin	Freight Rate	African Margin	Freight Rate	African Margin
01	Live animals	569.3	0.0	6.9	-18.1	.	.	6.9	-18.1
03	Fresh or frozen fish	259.9	2.0	33.8	7.7	92.8	87.5	30.6	7.4
08	Fresh or dried nuts and fruits	0.0	3,201.1	.	.	3.7	-0.5	3.7	-0.7
09	Coffee, tea and spices	1.6	10,310.4	9.4	-11.3	21.5	13.2	21.5	13.2
13	Raw vegetable suited for dyeing	1.3	142.8	74.4	68.4	5.0	1.1	5.7	1.8
15	Animal and vegetable oils	0.0	118.8	.	.	16.0	3.1	16.0	1.5
17	Sugars and sugar confectionery	0.0	5,242.6	.	.	12.9	2.9	13.3	3.7
18	Cocoa beans and chocolate	0.0	111,949.3	.	.	11.6	-0.7	11.6	-0.7
20	Preparation of vegetables	0.0	98.0	.	.	10.7	-3.8	10.7	-3.7
21	Miscellaneous prepared foods	0.0	299.7	.	.	10.0	4.8	10.0	4.7
22	Beverages	0.0	539.1	.	.	18.0	5.6	14.9	3.8
23	Animal feeds	0.0	771.0	.	.	50.6	17.9	50.6	17.9
24	Manufactured tobacco	0.0	2,087.1	.	.	6.8	-2.1	6.7	-2.4
27	Mineral fuels and oils	0.0	114,516.3	.	.	10.2	1.8	10.2	1.7
29	Organic chemicals	140.0	0.0	0.0	-2.1	.	.	0.0	-2.1
33	Essential oils and resinoids	0.0	499.9	.	.	4.0	1.2	4.0	1.1
39	Artificial resins and plastics	4.8	133.9	6.9	-5.4	6.3	-4.1	6.3	-4.3
40	Natural and synthetic rubber	0.0	10,152.4	.	.	10.9	0.7	10.9	0.6
41	Hides, skins and leather	59.3	0.0	4.3	1.4	.	.	4.3	1.9
42	Articles of leather	145.7	202.6	12.6	-3.9	5.2	2.6	7.8	3.0
44	Wood and wood articles	84.8	5,549.9	43.1	20.4	20.1	5.0	20.1	5.6
48	Paper and paperboard	0.0	56.1	.	.	11.0	6.3	11.0	4.9
52	Fabrics of cotton	2,372.1	2,126.8	23.4	13.2	4.9	0.9	14.6	9.5
54	Flax and ramie	0.0	72.8	.	.	2.7	-1.7	2.7	-1.8
61	Articles of apparel and clothing	53.0	60.5	17.3	1.4	2.4	-1.0	7.7	1.2
62	Other textile articles	230.0	76.4	9.6	1.7	6.3	2.4	8.7	3.3
64	Footwear	82.9	1,238.3	24.6	8.8	2.6	-1.0	4.0	-0.9
67	Skins of birds for wigs or beards	1.8	846.1	55.2	47.1	4.7	-1.4	4.8	-1.3
69	Ceramic products	0.0	422.6	.	.	13.2	5.2	12.8	4.6
71	Peals and precious stones	3,110.6	0.0	0.4	0.3	.	.	0.4	0.3
73	Iron and steel	2.3	50.9	8.7	-0.5	8.5	2.0	8.5	2.1
75	Nickel and articles	0.0	78.3	.	.	19.9	15.0	19.9	15.7
83	Articles of base metal	105.0	47.0	31.3	18.3	7.9	4.1	22.8	18.0
84	Boilers and mechanical appliances	420.9	10.5	3.7	-0.7	2.1	0.1	3.0	1.5
85	Electrical machinery	932.3	241.2	8.2	4.7	4.4	1.9	4.9	2.4
87	Vehicles other than railway	0.0	477.2	.	.	2.3	-3.1	2.3	-3.6
90	Scientific instruments	45.1	49.5	6.0	1.3	2.5	-0.2	4.1	0.7
94	Furniture and parts	4.8	152.8	40.8	26.0	9.2	-1.7	10.2	-0.9
95	Toys and games	77.9	379.3	14.0	-18.8	7.6	0.3	8.7	0.9
96	Miscellaneous manufactures	7.6	52.8	12.0	-8.8	12.0	6.6	12.0	4.6
97	Works of art	337.8	2.0	17.8	16.2	4.2	2.7	17.6	16.0
98	Special classification	599.0	3,214.0	3.8	2.4	12.1	8.9	10.8	8.9

Appendix Table 5. Air and Vessel Freight Rates for African Oil Exporting Countries Major Export Products to the United States

HS Code	Description	Exports (\$000)		Exports by Air		Exports by Vessel		All Exports	
		Air	Vessel	Freight Rate	African Margin	Freight Rate	African Margin	Freight Rate	African Margin
03	Fresh or frozen fish	519.4	4,786.9	63.2	17.5	10.6	5.8	15.7	7.1
05	Animal parts and skins	0.0	52.8	.	.	47.3	29.6	47.3	41.4
09	Coffee, tea and spices	0.0	401.2	.	.	21.4	1.1	21.3	0.0
13	Raw vegetable suited for dyeing	0.0	74.2	.	.	11.1	6.6	11.1	6.4
17	Sugars and sugar confectionery	0.0	2,927.9	.	.	11.2	1.2	11.2	1.7
18	Cocoa beans and chocolate	0.0	24,991.2	.	.	13.8	0.9	13.8	1.0
23	Animal feeds	0.0	1,489.9	.	.	55.7	33.3	55.7	33.3
26	Ores and concentrates	0.0	15,663.9	.	.	14.3	-6.4	14.3	-6.4
27	Mineral fuels and oils	0.0	7,238,253.2	.	.	6.6	-0.7	6.3	-1.2
31	Fertilizers	0.0	11,007.4	.	.	24.8	6.1	24.8	6.2
39	Artificial resins and plastics	10.0	868.6	20.3	8.2	9.2	5.6	9.4	5.0
40	Natural and synthetic rubber	0.0	18,447.1	.	.	10.7	-0.9	10.7	-0.9
41	Hides, skins and leather	150.0	718.4	9.4	5.9	2.0	-2.2	2.9	-2.8
44	Wood and wood articles	38.0	2,318.8	54.1	31.3	17.2	5.3	17.7	7.6
48	Paper and paperboard	0.0	72.8	.	.	12.1	1.2	7.9	-0.2
54	Flax and ramie	0.0	289.4	.	.	10.8	3.0	10.8	2.6
62	Other textile articles	287.9	0.3	20.8	6.6	2.1	-2.1	20.7	12.7
63	Old clothing and other textiles	6.6	151.2	79.2	53.5	11.8	2.1	14.7	4.9
71	Peals and precious stones	4,272.2	5.0	0.3	0.2	53.0	46.7	0.4	0.3
84	Boilers and mechanical appliances	242.6	745.9	1.8	1.0	5.3	1.9	4.5	1.6
88	Aircraft and parts	3.0	1,163.0	1.4	-0.3	1.0	0.3	1.0	-0.6
97	Works of art	604.8	30.4	1.0	-0.7	9.7	8.0	1.4	-0.2
98	Special classification	11,942.4	5,975.2	2.5	1.3	4.7	1.7	3.2	1.6

Appendix Table 6. Air and Vessel Freight Rates for the Republic of South Africa's Major Export Products to the United States

HS Code	2 Digit HS Description	Exports(\$000)		Exports by Air		Exports by Vessel		All Exports	
		Air	Vessel	Freight Rate	African Margin	Freight Rate	African Margin	Freight Rate	African Margin
01	Live animals	297.4	0.0	19.4	2.6	.	.	19.4	2.6
03	Fresh or frozen fish	335.0	25,512.4	19.6	3.8	6.9	1.3	7.0	1.3
04	Dairy products and eggs	505.6	0.0	7.4	3.1	.	.	7.4	3.0
05	Animal parts and skins	434.0	1,093.8	8.9	-0.9	1.9	-2.9	3.9	-3.8
06	Live trees and other plants	946.6	1,467.8	46.2	18.5	7.6	-3.3	22.7	5.2
07	Edible vegetables and roots	0.0	107.3	.	.	35.9	9.3	35.9	10.4
08	Fresh or dried nuts and fruits	9.4	11,268.0	50.0	38.6	4.9	-22.1	4.9	-22.2
09	Coffee, tea and spices	9.8	452.2	79.1	65.2	10.6	0.7	12.1	2.1
10	Cereals	0.0	105.1	.	.	17.4	9.1	17.4	9.0
12	Oil seeds and nuts	257.0	1,036.9	13.7	4.4	2.5	0.6	4.8	0.9
14	Vegetable products	0.0	123.3	.	.	12.9	-3.7	12.9	-3.8
15	Animal and vegetable oils	76.4	286.2	12.6	8.9	3.7	-3.8	5.6	-0.7
16	Preserved foods	132.8	1.6	33.0	1.7	8.4	4.7	32.7	24.7
17	Sugars and sugar confectionery	6.9	10,821.3	40.8	21.3	9.5	-0.5	9.5	-0.1
20	Preparations of vegetables	0.0	20,912.1	.	.	12.1	2.4	12.0	2.6
22	Beverages	0.0	2,500.2	.	.	7.9	0.2	7.7	-0.3
24	Manufactured tobacco	0.0	2,329.6	.	.	22.1	4.2	24.3	8.2
25	Sulphur and related compounds	1.7	17,948.9	90.5	83.3	18.5	-6.5	18.9	-6.7
26	Ores and concentrates	0.0	197,872.5	.	.	10.0	5.3	10.0	5.4
27	Mineral fuels and oils	0.0	13,107.2	.	.	15.8	-15.7	15.8	-15.7
28	Inorganic chemicals	917.1	26,258.1	2.8	-2.5	4.9	-0.1	3.8	0.0
29	Organic chemicals	7,060.7	18,802.5	1.4	0.8	7.4	1.1	5.7	0.8
30	Pharmaceutical products	100.7	285.8	5.0	1.0	4.0	-1.8	4.0	-1.1
31	Fertilizers	0.0	2,741.9	.	.	9.2	-9.3	9.2	-9.2
32	Tanning and dyeing extracts	1.8	12,258.4	9.1	-9.8	11.9	1.9	11.8	2.3
33	Essential oils and resinoids	99.6	639.2	6.2	3.1	7.0	3.9	7.1	3.7
34	Soap and washing preparations	0.0	77.5	.	.	14.0	6.6	14.0	5.6
35	Glues and substances	1,193.9	81.5	0.3	-5.4	5.9	1.8	0.7	-3.5
38	Miscellaneous chemicals	485.3	1,282.1	9.5	3.7	3.2	1.3	4.9	2.3
39	Artificial resins and plastics	1,472.1	3,761.7	12.3	0.9	10.4	4.1	10.9	3.8
40	Natural and synthetic rubber	62.9	5,074.1	13.2	2.8	14.8	4.1	14.7	3.9
41	Hides, skins and leather	15,537.3	144.7	1.6	-2.2	3.7	1.6	1.6	-1.9
42	Articles of leather	1,450.4	5.8	2.5	-5.1	11.2	9.6	2.5	-3.1
43	Furskins and artificial fur	205.5	3.4	17.8	8.2	7.5	3.9	17.6	9.3
44	Wood and articles of wood	69.0	3,002.7	25.0	2.5	10.1	-4.5	10.4	-4.0
47	Paper making material	0.0	36,266.8	.	.	10.2	-1.6	10.2	-0.6
48	Paper and paperboard	15.4	6,625.8	12.9	-3.7	13.1	1.5	15.1	3.6
49	Printed books and newspapers	393.2	171.5	13.6	0.4	9.9	5.8	12.5	6.1
51	Continuous man-made fibers	49.7	3,394.2	15.6	10.4	5.8	0.0	5.9	0.4
52	Fabrics of cotton	87.7	4,103.9	18.0	7.1	7.9	0.7	8.2	0.9
54	Flax and ramie	6.4	10,069.1	25.0	12.7	5.3	0.5	5.3	0.4
55	Cotton	16.0	1,461.4	38.3	27.6	9.0	1.5	9.3	1.8
56	Discontinuous man-made fibers	10.7	382.9	25.5	14.9	9.8	4.1	10.3	4.6

57	Other textile materials	110.8	123.2	32.3	20.9	5.8	3.0	18.2	13.8
58	Carpets	3,457.9	10.9	3.7	-3.3	2.7	0.2	3.7	-3.1
59	Twine, cordage and wadding	0.4	429.0	21.1	11.7	8.2	3.6	8.2	3.7
61	Articles of apparel and clothing	756.9	1,898.8	13.6	-0.3	5.8	1.5	8.1	2.1
62	Other textile articles	3,642.0	6,419.4	17.9	12.5	5.8	1.7	10.1	4.8
63	Old clothing and other textiles	186.1	393.4	14.5	-1.2	10.2	1.2	11.6	3.6
64	Footwear	1,101.9	93.2	3.5	-2.8	2.6	-1.3	3.4	-0.4
65	Headgear and parts	69.4	909.2	14.3	-0.8	3.7	0.5	4.4	-0.5
68	Articles of stone or plaster	41.7	2,989.5	14.4	4.6	12.4	-0.8	12.3	-0.7
69	Ceramic products	67.3	98.1	12.2	-2.4	13.9	4.3	11.7	2.3
70	Glass and glassware	5.6	16,320.2	55.2	47.0	8.0	2.1	8.2	1.6
71	Pearls and precious stones	816,540.0	702.3	0.2	-0.2	5.3	0.7	0.2	-0.2
72	Ferrous products	1.7	270,674.1	22.0	5.3	7.2	-2.4	7.2	-2.2
73	Iron and steel	67.7	22,049.6	17.9	4.6	11.3	-1.1	11.3	-1.1
74	Copper and articles	37.9	6,895.4	83.4	51.1	3.6	-1.4	5.0	-1.3
75	Nickel and articles	0.0	21,292.4	.	.	2.6	0.3	1.9	-0.3
76	Aluminum and articles	15.8	12,168.3	79.2	81.5	4.3	-0.8	4.4	-1.2
78	Lead and articles	0.0	465.4	.	.	8.2	2.8	8.2	1.8
79	Zinc and articles	0.0	238.1	.	.	5.9	-6.0	5.9	-5.6
81	Other base metal products	0.0	23,790.2	.	.	6.2	-0.5	5.9	-0.2
82	Tools and cutlery	326.6	624.5	9.2	4.0	6.4	3.7	7.3	3.5
83	Articles of base metal	29.3	945.8	20.8	8.0	9.3	3.2	9.7	3.3
84	Boilers and machinery appliances	4,551.9	30,515.7	8.0	4.2	6.8	2.5	6.8	2.4
85	Electrical machinery	1,298.6	1,000.5	4.8	0.7	4.6	2.0	4.7	1.9
86	Railway locomotives	140.0	1,597.7	6.9	-0.6	4.4	-0.8	3.8	-1.1
87	Vehicles other than railway	730.8	16,550.9	26.7	-0.2	4.1	-1.3	5.8	-0.1
88	Aircraft and parts	402.6	41.8	2.7	0.4	1.1	-0.6	2.6	0.6
89	Ships and boats	225.7	1,001.4	1.4	14.9	3.6	0.4	3.2	0.1
90	Scientific instruments	880.0	1,034.6	7.7	3.3	5.5	2.6	6.4	3.1
93	Rifles and military weapons	163.2	0.0	2.0	-2.8	.	.	2.0	-1.5
94	Furniture and parts	85.0	2,138.6	29.9	12.9	18.7	8.1	19.1	8.9
95	Toys and games	804.4	200.7	11.8	2.3	13.4	7.1	12.1	7.6
96	Miscellaneous manufactures	224.3	302.0	12.0	-2.0	4.0	-3.4	7.4	-0.4
97	Works of art	1,438.1	33.6	6.7	5.8	7.6	5.4	6.4	5.5
98	Special classification	30,532.2	13,783.8	1.6	0.3	5.2	2.4	3.5	1.9

Statistical Annex 2

Uruguay Round Concessions Received and Profiles of Protection Facing Sub-Saharan African Countries in the European Union, Japan and the United States

The following tables are based on data originating from the World Trade Organization's Integrated Data Base (IDB) and UNCTAD's Trade Analysis and Information System (TRAINS) Data Base. To calculate the preference margin reduction national tariff line trade data and post-Uruguay Round MFN tariff statistics from the IDB were combined with the most recent (current) applied tariff data reported in TRAINS. The TRAINS Data Base is very comprehensive including not only Most-Favored-Nation, Generalized System of Preference, Lome Convention, Caribbean Basin Initiative, and special rates negotiated in bilateral trade agreements (like NAFTA or EFTA) between countries.³⁸ In agriculture, however, the TRAINS Data Base contains missing MFN rates for most products that had NTBs "tariffied" during the Uruguay Round. In these cases, published estimates for their ad valorem equivalents were used in constructing the following tables (see Ingco 1995).

The projected post-Uruguay Round MFN rates shown in the following tables under the heading "MFN 1999" are defined as the lower of two numbers: (i) the current temporary MFN rate reported in TRAINS, and (ii) the post-Uruguay Round bound rate as reported in the Integrated Data Base. Since the IDB tariff lines do not reflect the most recent changes in the national tariff code, some of these calculations are done with simple averages at the six-digit HS level and some are done at the eight-digit level. If a match of the tariff codes could be established at the eight-digit level the computations were done at that level -- otherwise six-digit data were used.

The calculation of the applied tariff rates employs the following procedure. For each trade record, that is, each combination of importing market, HS code, and exporter, a list of all the applicable tariff rates (MFN, GSP, LDC and any other special trade agreement) was generated. This was accomplished by checking every special trade agreement between the importer and the exporter of the trade record. The lowest tariff was then picked among the list of tariff rates. To obtain the applied rate 1999 the previous procedure was repeated, this time substituting the projected MFN rate (MFN 1999) for the applied MFN rate.

The preference margin reduction is defined as the difference between the 1993 MFN and applied tariffs less the difference between the 1999 MFN and applied tariffs. In the following tables the tariff averages, and preference margin reductions, were aggregated using weights based on each African country's exports. In some cases, such as those where specific tariffs had not been converted to nominal equivalents, tariff line items had to be excluded from these computations.³⁹ Due to the extensive application of these charges to petroleum products these items had to be excluded from the results reported in the appendix tables.

Finally, the appendix tables also show the value of imports of each commodity group. For the European Union and Japan these statistics relate to 1988 and in the case of the United States 1989 statistics are shown.

³⁸See UNCTAD, A User's Manual for Trains, (UNCTAD/DMS/1) (Geneva: United Nations, 1993) for a description of the system and details on how it can be accessed.

³⁹Although most tariffs are expressed in nominal terms (i.e., a fixed percent of the value of the imported product) some are expressed as "specific" or fixed monetary charge per unit charges (such as \$2 per shirt or \$1.50 per kilogram of sugar. Some tariffs are also expressed as mixed nominal and specific duties (such as 10 percent plus \$3 per unit of imported good). Items covered by these types of charges (less than 2 percent of all EU and Japanese tariff line items were involved while the corresponding share for the United States was about 5 percent) had to be excluded from the computations presented in the appendix tables.

Pre- and Post- Uruguay-Round Tariff Preferences for Angola's Exports to the EU, Japan and USA

Market and Product	Imports 1988 (\$ '000)	Tariff Rate(%)				
		Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	27,086	0.05	0.05	4.08	0.11	3.97
Fish and Fish Products	29,978	0.00	0.00	16.51	11.43	5.08
Wood, Pulp, Paper and Furniture	246	0.00	0.00	0.84	0.21	0.63
Textiles and Clothing	125	0.00	0.00	12.93	10.92	2.01
Leather, Rubber, Footwear	16	0.00	0.00	6.94	3.98	2.96
Metals	238	0.00	0.00	4.82	2.27	2.55
Chemical & Photographic Suppl.	7	0.00	0.00	6.60	0.93	5.67
Transport Equipment	274	0.00	0.00	1.11	0.79	0.32
Non - Electric Machinery	1,867	0.00	0.00	1.60	0.87	0.73
Electric Machinery	149	0.00	0.00	3.90	2.45	1.45
Mineral Prod.,Prec. Stones&Metal	159,565	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	167	0.00	0.00	5.94	3.02	2.92
<u>Japan</u>						
Mineral Prod.,Prec. Stones&Metal	822	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	38	0.00	0.00	4.00	1.80	2.20
Wood, Pulp, Paper and Furniture	2	0.00	0.00	0.00	0.00	0.00
Transport Equipment	11	0.00	0.00	0.00	0.00	0.00
Non - Electric Machinery	19	0.00	0.00	2.33	0.00	2.33
Mineral Prod.,Prec. Stones&Metal	26,264	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	15	0.00	0.00	0.00	0.00	0.00

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Benin's Exports to the EU, Japan and USA

Market and Product	Imports 1988 (\$ '000)	Tariff Rate(%)				
		Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	8,607	0.00	0.00	4.69	3.33	1.36
Fish and Fish Products	946	0.00	0.00	17.94	11.99	5.95
Wood, Pulp, Paper and Furniture	277	0.00	0.00	0.41	0.20	0.22
Textiles and Clothing	229	0.00	0.00	5.24	3.59	1.65
Leather, Rubber, Footwear	33	0.00	0.00	5.62	4.27	1.35
Metals	263	0.00	0.00	1.54	0.76	0.78
Chemical & Photographic Suppl.	209	0.00	0.00	6.74	2.23	4.50
Transport Equipment	6,904	0.00	0.00	0.18	0.16	0.02
Non - Electric Machinery	273	0.00	0.00	2.70	0.69	2.01
Electric Machinery	520	0.00	0.00	3.25	3.12	0.13
Mineral Prod.,Prec. Stones&Metal	137	0.00	0.00	7.97	4.00	3.97
Manufactured Articles nes.	16,234	0.00	0.00	0.03	0.01	0.02
<u>Japan</u>						
Agriculture excluding Fish	1,275	2.84	2.84	2.84	2.84	0.00
<u>United States</u>						
Agriculture excluding Fish	617	0.00	0.00	0.00	0.00	0.00
Textiles and Clothing	1	7.20	6.30	7.20	6.30	0.00

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Botswana's Exports to the EU, Japan and USA

Market and Product	Imports	Tariff Rate(%)				
	1988 (\$ '000)	Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	22,047	0.00	0.00	17.19	11.23	5.95
Fish and Fish Products	5,579	0.00	0.00	14.97	10.14	4.83
Wood, Pulp, Paper and Furniture	190	0.00	0.00	5.48	0.63	4.85
Textiles and Clothing	2,583	0.00	0.00	11.08	9.10	1.99
Leather, Rubber, Footwear	3,498	0.00	0.00	0.16	0.10	0.06
Metals	11,511	0.00	0.00	0.04	0.04	0.00
Chemical & Photographic Suppl.	5	0.00	0.00	6.00	0.00	6.00
Transport Equipment	18	0.00	0.00	2.59	1.63	0.96
Non - Electric Machinery	131	0.00	0.00	4.99	2.61	2.39
Electric Machinery	139	0.00	0.00	5.55	3.53	2.02
Mineral Prod.,Prec. Stones&Metal	2,702	0.00	0.00	0.01	0.01	0.01
Manufactured Articles nes.	588	0.00	0.00	0.60	0.27	0.33
<u>Japan</u>						
Agriculture excluding Fish	337	0.00	0.00	0.00	0.00	0.00
Wood, Pulp, Paper and Furniture	5	0.00	0.00	0.00	0.00	0.00
Leather, Rubber, Footwear	69	0.00	0.00	3.19	3.19	0.00
Metals	195	0.00	0.00	1.00	0.00	1.00
Manufactured Articles nes.	10	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	518	0.00	0.00	5.32	0.77	4.55
Wood, Pulp, Paper and Furniture	6	0.00	0.00	1.77	0.00	1.77
Textiles and Clothing	1,323	15.18	13.38	15.24	13.39	0.05
Leather, Rubber, Footwear	5,855	4.81	3.18	4.99	3.33	0.03
Chemical & Photographic Suppl.	8	0.00	0.00	0.00	0.00	0.00
Electric Machinery	43	0.00	0.00	3.00	3.00	0.00
Mineral Prod.,Prec. Stones&Metal	7,502	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	939	0.00	0.00	0.44	0.01	0.43

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Burkina Faso's Exports to the EU, Japan and USA

Market and Product	Imports 1988 (\$ '000)	Tariff Rate(%)				
		Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	11,275	0.01	0.01	8.13	6.08	2.05
Wood, Pulp, Paper and Furniture	69	0.00	0.00	3.24	1.00	2.25
Textiles and Clothing	24	0.00	0.00	9.56	8.77	0.79
Leather, Rubber, Footwear	1,584	0.00	0.00	3.18	2.30	0.88
Metals	105	0.00	0.00	3.20	1.66	1.54
Chemical & Photographic Suppl.	136	0.00	0.00	6.31	2.18	4.12
Transport Equipment	103	0.00	0.00	10.82	10.37	0.45
Non - Electric Machinery	358	0.00	0.00	4.05	1.47	2.58
Electric Machinery	29	0.00	0.00	5.46	3.02	2.44
Mineral Prod.,Prec. Stones&Metal	42,958	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	35,877	0.00	0.00	0.06	0.04	0.02
<u>Japan</u>						
Agriculture excluding Fish	1,552	0.50	0.50	0.50	0.50	0.00
Wood, Pulp, Paper and Furniture	3	0.00	0.00	3.20	0.00	3.20
Textiles and Clothing	23	1.46	0.73	8.39	6.96	0.70
Manufactured Articles nes.	2,996	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	76	0.00	0.00	7.50	0.00	7.50
Wood, Pulp, Paper and Furniture	8	0.00	0.00	4.78	2.80	1.98
Textiles and Clothing	11	10.41	9.41	10.41	9.41	0.00
Leather, Rubber, Footwear	2	9.00	9.00	9.00	9.00	0.00
Metals	118	0.00	0.00	3.26	2.93	0.33
Chemical & Photographic Suppl.	35	0.00	0.00	3.10	3.10	0.00
Mineral Prod.,Prec. Stones&Metal	9	0.00	0.00	11.00	4.50	6.50
Manufactured Articles nes.	87	0.00	0.00	0.44	0.32	0.13

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Burundi's Exports to the EU, Japan and USA

Market and Product	Imports	Tariff Rate(%)				
	1988 (\$ '000)	Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	77,390	0.01	0.01	4.20	0.22	3.98
Fish and Fish Products	252	0.00	0.00	0.06	0.06	0.00
Wood, Pulp, Paper and Furniture	17	0.00	0.00	7.19	0.00	7.19
Textiles and Clothing	185	0.00	0.00	7.28	5.18	2.11
Leather, Rubber, Footwear	52	0.00	0.00	11.13	8.75	2.38
Metals	136	0.00	0.00	1.79	0.16	1.64
Chemical & Photographic Suppl.	8	0.00	0.00	8.30	5.69	2.61
Transport Equipment	119	0.00	0.00	9.85	9.72	0.13
Non - Electric Machinery	196	0.00	0.00	4.16	0.30	3.86
Electric Machinery	41	0.00	0.00	5.16	3.26	1.90
Mineral Prod.,Prec. Stones&Metal	43,117	0.00	0.00	0.01	0.00	0.01
Manufactured Articles nes.	4,799	0.00	0.00	0.17	0.07	0.10
<u>Japan</u>						
Agriculture excluding Fish	6,202	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	2	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	4,408	0.00	0.00	0.01	0.00	0.00
Fish and Fish Products	34	0.00	0.00	0.00	0.00	0.00
Wood, Pulp, Paper and Furniture	11	0.00	0.00	0.93	0.58	0.35
Mineral Prod.,Prec. Stones&Metal	17	0.00	0.00	0.00	0.00	0.00

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Cameroon's Exports to the EU, Japan and USA

Market and Product	Imports 1988 (\$ '000)	Tariff Rate(%)				
		Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	432,067	0.00	0.00	4.83	0.75	4.08
Fish and Fish Products	9,268	0.00	0.00	17.61	11.72	5.89
Wood, Pulp, Paper and Furniture	199,312	0.00	0.00	0.79	0.48	0.31
Textiles and Clothing	19,329	0.00	0.00	10.24	8.42	1.83
Leather, Rubber, Footwear	38,744	0.00	0.00	0.28	0.21	0.07
Metals	120,532	0.00	0.00	5.82	5.79	0.02
Chemical & Photographic Suppl.	848	0.00	0.00	8.06	5.76	2.30
Transport Equipment	2,327	0.00	0.00	9.27	8.55	0.72
Non - Electric Machinery	2,062	0.00	0.00	4.07	0.69	3.38
Electric Machinery	530	0.00	0.00	5.05	2.78	2.26
Mineral Prod.,Prec. Stones&Metal	399	0.00	0.00	1.98	1.10	0.88
Manufactured Articles nes.	23,405	0.00	0.00	0.15	0.07	0.08
<u>Japan</u>						
Agriculture excluding Fish	13,525	0.00	0.00	0.00	0.00	0.00
Wood, Pulp, Paper and Furniture	3,306	0.01	0.00	0.32	0.00	0.31
Manufactured Articles nes.	1,162	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	20,034	0.00	0.00	0.04	0.02	0.02
Fish and Fish Products	1	0.00	0.00	0.00	0.00	0.00
Wood, Pulp, Paper and Furniture	1,031	0.00	0.00	0.00	0.00	0.00
Textiles and Clothing	118	7.62	6.63	8.64	6.72	0.93
Leather, Rubber, Footwear	2,088	0.27	0.27	0.27	0.27	0.00
Metals	245	0.00	0.00	3.01	2.96	0.05
Chemical & Photographic Suppl.	37	0.00	0.00	4.59	0.48	4.11
Non - Electric Machinery	68	0.00	0.00	3.57	2.87	0.71
Electric Machinery	43	0.00	0.00	5.44	3.17	2.27
Mineral Prod.,Prec. Stones&Metal	2	0.00	0.00	7.00	6.00	1.00
Manufactured Articles nes.	444	0.00	0.00	7.54	0.03	7.51

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Cape Verde's Exports to the EU, Japan and USA

Market and Product	Imports 1988 (\$ '000)	Tariff Rate(%)				
		Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	1,633	0.00	0.00	23.23	3.01	20.22
Fish and Fish Products	1,670	0.00	0.00	22.56	18.43	4.13
Wood, Pulp, Paper and Furniture	28	0.00	0.00	0.61	0.00	0.61
Textiles and Clothing	54	0.00	0.00	10.96	8.96	2.00
Leather, Rubber, Footwear	30	0.00	0.00	20.00	17.00	3.00
Metals	142	0.00	0.00	4.69	2.58	2.11
Chemical & Photographic Suppl.	10	0.00	0.00	8.88	5.85	3.03
Non - Electric Machinery	105	0.00	0.00	4.85	2.59	2.26
Electric Machinery	34	0.00	0.00	5.55	3.77	1.78
Mineral Prod.,Prec. Stones&Metal	43	0.00	0.00	2.05	0.00	2.05
Manufactured Articles nes.	110	0.00	0.00	1.50	0.71	0.79
<u>United States</u>						
Fish and Fish Products	7	0.00	0.00	0.00	0.00	0.00
Metals	1,655	.	.	.	.	.
Manufactured Articles nes.	176	0.00	0.00	3.90	0.00	3.90

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Central African Republic's Exports to the EU, Japan and

Market and Product	Imports 1988 (\$ '000)	Tariff Rate(%)				
		Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	30,474	0.00	0.00	4.84	0.98	3.87
Wood, Pulp, Paper and Furniture	8,356	0.00	0.00	0.36	0.16	0.20
Textiles and Clothing	626	0.00	0.00	3.45	2.71	0.75
Leather, Rubber, Footwear	42	0.00	0.00	6.21	4.42	1.80
Metals	67	0.00	0.00	4.98	1.31	3.67
Chemical & Photographic Suppl.	118	0.00	0.00	8.59	2.92	5.67
Transport Equipment	838	0.00	0.00	4.08	4.06	0.02
Non - Electric Machinery	125	0.00	0.00	4.26	1.55	2.72
Electric Machinery	135	0.00	0.00	5.70	3.13	2.57
Mineral Prod.,Prec. Stones&Metal	50,633	0.00	0.00	0.01	0.00	0.00
Manufactured Articles nes.	4,418	0.00	0.00	0.04	0.02	0.02
<u>Japan</u>						
Agriculture excluding Fish	208	0.00	0.00	0.00	0.00	0.00
Wood, Pulp, Paper and Furniture	39	0.00	0.00	0.00	0.00	0.00
Textiles and Clothing	52	0.00	0.00	1.75	0.00	1.75
Manufactured Articles nes.	189	0.00	0.00	1.12	1.06	0.06
<u>United States</u>						
Agriculture excluding Fish	1,661	0.00	0.00	0.00	0.00	0.00
Chemical & Photographic Suppl.	1	0.00	0.00	5.30	5.30	0.00
Mineral Prod.,Prec. Stones&Metal	490	0.00	0.00	0.02	0.00	0.02
Manufactured Articles nes.	4	0.00	0.00	4.20	0.00	4.20

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Chad's Exports to the EU, Japan and USA

Market and Product	Imports 1988 (\$ '000)	Tariff Rate(%)				
		Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	4,722	0.00	0.00	3.37	2.15	1.21
Wood, Pulp, Paper and Furniture	216	0.00	0.00	9.39	6.16	3.24
Textiles and Clothing	9	0.00	0.00	6.53	6.20	0.33
Metals	38	0.00	0.00	0.85	0.68	0.17
Chemical & Photographic Suppl.	23	0.00	0.00	7.92	4.84	3.08
Transport Equipment	70	0.00	0.00	9.95	9.91	0.04
Non - Electric Machinery	42	0.00	0.00	2.66	1.08	1.58
Electric Machinery	22	0.00	0.00	7.11	3.31	3.79
Mineral Prod.,Prec. Stones&Metal	5	0.00	0.00	2.80	0.00	2.80
Manufactured Articles nes.	46,484	0.00	0.00	0.05	0.02	0.02
<u>Japan</u>						
Fish and Fish Products	62	5.00	3.50	5.00	3.50	0.00
Manufactured Articles nes.	4,054	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	34	0.00	0.00	0.00	0.00	0.00
Fish and Fish Products	3	0.00	0.00	0.00	0.00	0.00
Wood, Pulp, Paper and Furniture	44	0.00	0.00	8.00	8.00	0.00
Manufactured Articles nes.	3	0.00	0.00	0.00	0.00	0.00

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Comoros's Exports to the EU, Japan and USA

Market and Product	Imports 1988 (\$ '000)	Tariff Rate(%)				
		Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	6,527	0.00	0.00	10.31	6.12	4.18
Wood, Pulp, Paper and Furniture	108	0.00	0.00	0.00	0.00	0.00
Textiles and Clothing	100	0.00	0.00	8.92	8.16	0.76
Leather, Rubber, Footwear	159	0.00	0.00	5.95	4.99	0.96
Metals	1	0.00	0.00	11.00	8.50	2.50
Chemical & Photographic Suppl.	8	0.00	0.00	9.80	6.50	3.30
Transport Equipment	18	0.00	0.00	9.79	9.64	0.15
Non - Electric Machinery	90	0.00	0.00	2.88	2.56	0.32
Electric Machinery	14	0.00	0.00	11.98	11.64	0.34
Manufactured Articles nes.	5,416	0.00	0.00	0.29	0.18	0.11
<u>Japan</u>						
Agriculture excluding Fish	392	0.00	0.00	0.00	0.00	0.00
Leather, Rubber, Footwear	4	0.00	0.00	60.00	27.00	33.00
Manufactured Articles nes.	260	0.00	0.00	2.36	0.03	2.32
<u>United States</u>						
Agriculture excluding Fish	7,623	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	201	0.00	0.00	0.00	0.00	0.00

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Congo's Exports to the EU, Japan and USA

Market and Product	Imports 1988 (\$ '000)	Tariff Rate(%)				
		Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	10,651	0.00	0.00	3.49	0.24	3.25
Fish and Fish Products	2,243	0.00	0.00	17.60	11.73	5.87
Wood, Pulp, Paper and Furniture	116,113	0.00	0.00	1.01	0.52	0.49
Textiles and Clothing	98	0.00	0.00	8.60	6.99	1.61
Leather, Rubber, Footwear	584	0.00	0.00	6.56	6.04	0.52
Metals	6,780	0.00	0.00	0.35	0.04	0.31
Chemical & Photographic Suppl.	41	0.00	0.00	6.52	4.41	2.11
Transport Equipment	735	0.00	0.00	7.80	7.51	0.28
Non - Electric Machinery	924	0.00	0.00	4.61	1.64	2.98
Electric Machinery	2,340	0.00	0.00	5.02	2.69	2.33
Mineral Prod.,Prec. Stones&Metal	66,276	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	1,709	0.00	0.00	3.48	1.45	2.03
<u>Japan</u>						
Agriculture excluding Fish	5,193	0.00	0.00	0.00	0.00	0.00
Wood, Pulp, Paper and Furniture	6,636	0.00	0.00	0.35	0.00	0.34
Metals	5,258	0.00	0.00	0.00	0.00	0.00
Mineral Prod.,Prec. Stones&Metal	371	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	57	0.00	0.00	5.30	5.00	0.30
<u>United States</u>						
Wood, Pulp, Paper and Furniture	357	0.00	0.00	0.00	0.00	0.00
Metals	1,083	0.00	0.00	0.05	0.02	0.02
Non - Electric Machinery	41	0.00	0.00	5.50	3.58	1.92
Mineral Prod.,Prec. Stones&Metal	4,107	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	146	0.00	0.00	0.00	0.00	0.00

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Cote d'Ivoire's Exports to the EU, Japan and USA

Market and Product	Imports 1988 (\$ '000)	Tariff Rate(%)				
		Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	1,151,942	0.00	0.00	6.27	2.01	4.25
Fish and Fish Products	137,538	0.00	0.00	23.09	22.47	0.63
Wood, Pulp, Paper and Furniture	293,592	0.00	0.00	1.05	0.52	0.52
Textiles and Clothing	43,006	0.00	0.00	10.40	8.48	1.93
Leather, Rubber, Footwear	62,084	0.00	0.00	0.02	0.02	0.00
Metals	3,713	0.00	0.00	0.52	0.20	0.32
Chemical & Photographic Suppl.	636	0.00	0.00	5.57	3.83	1.74
Transport Equipment	16,912	0.00	0.00	1.40	1.10	0.30
Non - Electric Machinery	3,880	0.00	0.00	4.24	1.62	2.63
Electric Machinery	255	0.00	0.00	6.20	3.77	2.43
Mineral Prod.,Prec. Stones&Metal	67,953	0.00	0.00	0.02	0.01	0.01
Manufactured Articles nes.	61,313	0.00	0.00	0.49	0.30	0.19
<u>Japan</u>						
Agriculture excluding Fish	15,544	0.09	0.09	0.57	0.09	0.47
Fish and Fish Products	22	5.00	3.50	5.00	3.50	0.00
Wood, Pulp, Paper and Furniture	415	0.22	0.22	2.90	1.71	1.18
Non - Electric Machinery	3	0.00	0.00	0.00	0.00	0.00
Mineral Prod.,Prec. Stones&Metal	43	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	3,987	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	168,227	0.00	0.00	0.18	0.17	0.01
Fish and Fish Products	227	5.95	5.95	5.95	5.95	0.00
Wood, Pulp, Paper and Furniture	4,598	0.00	0.00	0.08	0.05	0.04
Textiles and Clothing	622	5.41	4.12	8.79	6.28	1.23
Leather, Rubber, Footwear	6,137	0.44	0.41	0.60	0.52	0.05
Metals	156	0.61	0.00	1.73	0.54	0.58
Chemical & Photographic Suppl.	219	0.00	0.00	3.57	1.73	1.84
Transport Equipment	2	0.00	0.00	0.00	0.00	0.00
Non - Electric Machinery	614	0.00	0.00	1.93	0.32	1.61
Electric Machinery	958	1.64	0.00	4.23	0.93	1.66
Mineral Prod.,Prec. Stones&Metal	16,000	0.00	0.00	0.05	0.03	0.03
Manufactured Articles nes.	1,752	0.00	0.00	2.55	0.90	1.65

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Djibouti's Exports to the EU, Japan and USA

Market and Product	Imports 1988 (\$ '000)	Tariff Rate(%)				
		Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	722	0.00	0.00	0.14	0.13	0.01
Wood, Pulp, Paper and Furniture	25	0.00	0.00	2.16	0.00	2.16
Textiles and Clothing	572	0.00	0.00	13.67	11.73	1.94
Leather, Rubber, Footwear	15	0.00	0.00	8.00	8.00	0.00
Metals	185	0.00	0.00	3.19	0.88	2.31
Chemical & Photographic Suppl.	16	0.00	0.00	8.40	6.50	1.90
Transport Equipment	8,785	0.00	0.00	0.13	0.12	0.01
Non - Electric Machinery	83	0.00	0.00	5.43	2.59	2.83
Electric Machinery	148	0.00	0.00	2.17	1.87	0.31
Mineral Prod.,Prec. Stones&Metal	4	0.00	0.00	0.90	0.00	0.90
Manufactured Articles nes.	2,547	0.00	0.00	0.62	0.38	0.24
<u>United States</u>						
Agriculture excluding Fish	5	0.00	0.00	4.80	3.06	1.74
Textiles and Clothing	110	21.00	16.50	21.00	16.50	0.00

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Equatorial Guinea's Exports to the EU, Japan and USA

Market and Product	Imports 1988 (\$ '000)	Tariff Rate(%)				
		Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	14,979	0.00	0.00	3.10	0.01	3.09
Fish and Fish Products	4,185	0.00	0.00	18.00	12.00	6.00
Wood, Pulp, Paper and Furniture	28,719	0.00	0.00	0.54	0.31	0.23
Textiles and Clothing	108	0.00	0.00	7.94	6.07	1.86
Leather, Rubber, Footwear	48	0.00	0.00	4.69	3.75	0.94
Metals	58	0.00	0.00	3.80	0.93	2.87
Chemical & Photographic Suppl.	78	0.00	0.00	11.55	6.50	5.05
Transport Equipment	64	0.00	0.00	9.43	6.44	2.99
Non - Electric Machinery	33	0.00	0.00	5.30	0.41	4.89
Electric Machinery	37	0.00	0.00	5.65	2.93	2.72
Manufactured Articles nes.	77	0.00	0.00	0.55	0.00	0.55
<u>Japan</u>						
Agriculture excluding Fish	2	0.00	0.00	0.00	0.00	0.00
Non - Electric Machinery	8	0.00	0.00	0.00	0.00	0.00

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Ethiopia's Exports to the EU, Japan and USA

Market and Product	Imports 1988 (\$ '000)	Tariff Rate(%)				
		Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	124,528	0.00	0.00	4.45	0.57	3.88
Fish and Fish Products	32	0.00	0.00	1.56	0.78	0.78
Wood, Pulp, Paper and Furniture	44	0.00	0.00	2.41	0.00	2.41
Textiles and Clothing	5,270	0.00	0.00	12.13	10.78	1.35
Leather, Rubber, Footwear	25,970	0.00	0.00	3.11	2.32	0.79
Metals	446	0.00	0.00	0.15	0.10	0.05
Chemical & Photographic Suppl.	2,033	0.00	0.00	0.02	0.02	0.01
Transport Equipment	197	0.00	0.00	3.67	3.56	0.11
Non - Electric Machinery	696	0.00	0.00	1.45	0.61	0.84
Electric Machinery	30	0.00	0.00	1.39	0.93	0.46
Mineral Prod.,Prec. Stones&Metal	320	0.00	0.00	0.21	0.19	0.02
Manufactured Articles nes.	7,733	0.00	0.00	0.04	0.01	0.03
<u>Japan</u>						
Agriculture excluding Fish	40,854	0.04	0.04	0.23	0.21	0.02
Textiles and Clothing	5	0.00	0.00	8.64	5.58	3.06
Leather, Rubber, Footwear	504	0.00	0.00	0.84	0.12	0.72
Manufactured Articles nes.	16,343	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	60,216	0.00	0.00	0.00	0.00	0.00
Wood, Pulp, Paper and Furniture	2	0.00	0.00	0.00	0.00	0.00
Textiles and Clothing	2	0.00	0.00	7.70	1.20	6.50
Leather, Rubber, Footwear	582	6.00	6.00	6.00	6.00	0.00
Chemical & Photographic Suppl.	9	0.00	0.00	2.40	2.40	0.00
Non - Electric Machinery	19	0.00	0.00	0.00	0.00	0.00
Mineral Prod.,Prec. Stones&Metal	3	0.00	0.00	5.80	3.90	1.90
Manufactured Articles nes.	7,474	0.00	0.00	2.46	1.56	0.90

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Gabon's Exports to the EU, Japan and USA

Market and Product	Imports 1988 (\$ '000)	Tariff Rate(%)				
		Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	7,228	0.00	0.00	3.54	0.37	3.17
Fish and Fish Products	19,720	0.00	0.00	17.73	11.98	5.76
Wood, Pulp, Paper and Furniture	143,367	0.00	0.00	1.68	1.12	0.56
Textiles and Clothing	59	0.00	0.00	12.66	11.12	1.54
Leather, Rubber, Footwear	24	0.00	0.00	2.64	1.54	1.10
Metals	110,555	0.00	0.00	0.03	0.01	0.02
Chemical & Photographic Suppl.	16,029	0.00	0.00	7.63	4.91	2.72
Transport Equipment	269,218	0.00	0.00	0.07	0.07	0.00
Non - Electric Machinery	2,078	0.00	0.00	4.85	0.57	4.28
Electric Machinery	552	0.00	0.00	4.47	2.76	1.71
Mineral Prod.,Prec. Stones&Metal	4,012	0.00	0.00	2.02	1.45	0.58
Manufactured Articles nes.	1,369	0.00	0.00	3.41	1.86	1.55
<u>Japan</u>						
Agriculture excluding Fish	2,679	0.00	0.00	0.00	0.00	0.00
Wood, Pulp, Paper and Furniture	26,986	0.00	0.00	0.20	0.00	0.20
Metals	533	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	765	0.00	0.00	0.00	0.00	0.00
Fish and Fish Products	24	0.00	0.00	0.00	0.00	0.00
Wood, Pulp, Paper and Furniture	93	0.00	0.00	0.75	0.04	0.71
Textiles and Clothing	2	17.70	16.60	17.70	16.60	0.00
Metals	18,143	0.00	0.00	0.00	0.00	0.00
Chemical & Photographic Suppl.	90	0.17	0.00	3.81	3.35	0.29
Non - Electric Machinery	13	0.00	0.00	3.78	2.57	1.21
Electric Machinery	15	0.00	0.00	3.65	2.69	0.96
Mineral Prod.,Prec. Stones&Metal	19	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	1,120	0.00	0.00	5.78	0.03	5.74

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Gambia's Exports to the EU, Japan and USA

Market and Product	Imports 1988 (\$ '000)	Tariff Rate(%)				
		Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	9,135	0.00	0.00	7.17	4.68	2.48
Fish and Fish Products	5,681	0.00	0.00	14.42	10.43	3.98
Wood, Pulp, Paper and Furniture	247	0.00	0.00	1.48	0.71	0.77
Textiles and Clothing	22	0.00	0.00	8.77	7.59	1.18
Leather, Rubber, Footwear	427	0.00	0.00	0.53	0.37	0.16
Metals	1,273	0.00	0.00	4.84	4.83	0.01
Chemical & Photographic Suppl.	331	0.00	0.00	10.84	5.32	5.53
Transport Equipment	319	0.00	0.00	6.36	3.97	2.39
Non - Electric Machinery	813	0.00	0.00	5.19	0.08	5.11
Electric Machinery	16	0.00	0.00	5.02	2.71	2.31
Mineral Prod.,Prec. Stones&Metal	26,425	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	511	0.00	0.00	0.86	0.26	0.60
<u>Japan</u>						
Fish and Fish Products	45,004	1.19	0.75	10.48	5.96	4.08
Mineral Prod.,Prec. Stones&Metal	7	0.00	0.00	5.30	3.50	1.80
Manufactured Articles nes.	5	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	9	.	.	.	.	.
Fish and Fish Products	1	0.00	0.00	0.00	0.00	0.00
Textiles and Clothing	13	14.54	11.68	14.54	11.68	0.00
Leather, Rubber, Footwear	2	10.00	10.00	10.00	10.00	0.00
Non - Electric Machinery	3	0.00	0.00	0.00	0.00	0.00
Mineral Prod.,Prec. Stones&Metal	1	0.00	0.00	4.70	0.00	4.70
Manufactured Articles nes.	64	0.00	0.00	0.00	0.00	0.00

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Ghana's Exports to the EU, Japan and USA

Market and Product	Imports 1988 (\$ '000)	Tariff Rate(%)				
		Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	208,736	0.00	0.00	4.20	1.52	2.68
Fish and Fish Products	3,163	0.00	0.00	16.09	13.99	2.11
Wood, Pulp, Paper and Furniture	135,812	0.00	0.00	0.75	0.39	0.36
Textiles and Clothing	73	0.00	0.00	9.51	8.21	1.30
Leather, Rubber, Footwear	320	0.00	0.00	0.10	0.07	0.02
Metals	212,756	0.00	0.00	5.54	5.53	0.01
Chemical & Photographic Suppl.	200	0.00	0.00	7.67	5.65	2.02
Transport Equipment	255	0.00	0.00	4.58	2.78	1.81
Non - Electric Machinery	1,151	0.00	0.00	5.68	0.37	5.31
Electric Machinery	538	0.00	0.00	6.49	3.39	3.10
Mineral Prod.,Prec. Stones&Metal	6,255	0.00	0.00	0.01	0.00	0.00
Manufactured Articles nes.	628	0.00	0.00	4.04	2.45	1.59
<u>Japan</u>						
Agriculture excluding Fish	57,395	0.01	0.01	0.01	0.01	0.00
Fish and Fish Products	12,269	4.92	3.36	4.92	3.36	0.00
Metals	5,278	0.00	0.00	0.00	0.00	0.00
Mineral Prod.,Prec. Stones&Metal	2,549	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	10	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	32,793	0.00	0.00	0.03	0.02	0.01
Fish and Fish Products	13,859	0.00	0.00	0.00	0.00	0.00
Wood, Pulp, Paper and Furniture	1,812	0.00	0.00	0.14	0.08	0.05
Textiles and Clothing	30	10.39	8.97	12.27	10.14	0.72
Leather, Rubber, Footwear	3	10.00	10.00	10.00	10.00	0.00
Metals	22,633	0.00	0.00	0.09	0.09	0.00
Non - Electric Machinery	46	0.00	0.00	0.46	0.00	0.46
Electric Machinery	1	0.00	0.00	3.00	0.80	2.20
Mineral Prod.,Prec. Stones&Metal	45,819	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	54	0.20	0.20	0.60	0.60	0.00

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Guinea's Exports to the EU, Japan and USA

Market and Product	Imports	Tariff Rate(%)				
	1988 (\$ '000)	Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	15,080	0.00	0.00	3.93	0.48	3.44
Fish and Fish Products	329	0.00	0.00	14.46	11.95	2.51
Wood, Pulp, Paper and Furniture	630	0.00	0.00	1.71	0.87	0.85
Textiles and Clothing	47	0.00	0.00	13.12	9.80	3.32
Leather, Rubber, Footwear	330	0.00	0.00	0.39	0.28	0.11
Metals	174,435	0.00	0.00	0.00	0.00	0.00
Chemical & Photographic Suppl.	41,421	0.00	0.00	5.70	4.00	1.70
Transport Equipment	88	0.00	0.00	8.90	7.22	1.69
Non - Electric Machinery	376	0.00	0.00	4.19	0.66	3.53
Electric Machinery	187	0.00	0.00	6.64	3.37	3.28
Mineral Prod.,Prec. Stones&Metal	47,912	0.00	0.00	0.01	0.00	0.00
Manufactured Articles nes.	5,097	0.00	0.00	1.46	0.84	0.62
<u>Japan</u>						
Agriculture excluding Fish	19	0.00	0.00	0.00	0.00	0.00
Fish and Fish Products	1,041	4.70	3.14	4.89	3.27	0.06
Metals	54	0.00	0.00	0.00	0.00	0.00
Chemical & Photographic Suppl.	4	0.00	0.00	5.60	0.00	5.60
<u>United States</u>						
Agriculture excluding Fish	5,661	0.00	0.00	0.07	0.04	0.04
Fish and Fish Products	2					
Wood, Pulp, Paper and Furniture	55	0.00	0.00	0.60	0.35	0.25
Textiles and Clothing	34	8.09	8.07	8.09	8.07	0.00
Metals	108,360	0.00	0.00	0.03	0.00	0.03
Chemical & Photographic Suppl.	2	0.00	0.00	3.80	3.80	0.00
Transport Equipment	51	0.00	0.00	0.61	0.49	0.12
Non - Electric Machinery	51	0.00	0.00	4.36	4.24	0.12
Electric Machinery	15	0.00	0.00	2.91	2.12	0.79
Mineral Prod.,Prec. Stones&Metal	17,845	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	244	0.00	0.00	2.49	1.91	0.58

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Guinea-Bissau's Exports to the EU, Japan and USA

Market and Product	Imports 1988 (\$ '000)	Tariff Rate(%)				
		Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	1,723	0.01	0.01	0.51	0.01	0.50
Fish and Fish Products	2,965	0.00	0.00	15.84	11.41	4.43
Wood, Pulp, Paper and Furniture	793	0.00	0.00	0.59	0.18	0.41
Textiles and Clothing	5	0.00	0.00	13.20	12.00	1.20
Metals	293	0.00	0.00	0.12	0.00	0.12
Chemical & Photographic Suppl.	15	0.00	0.00	8.40	6.50	1.90
Transport Equipment	9	0.00	0.00	10.00	10.00	0.00
Non - Electric Machinery	32	0.00	0.00	3.31	1.06	2.25
Electric Machinery	43	0.00	0.00	5.10	3.80	1.31
Mineral Prod.,Prec. Stones&Metal	193	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	1,427	0.00	0.00	0.00	0.00	0.00
<u>Japan</u>						
Fish and Fish Products	99	5.00	3.50	5.00	3.50	0.00
<u>United States</u>						
Textiles and Clothing	1	12.00	11.30	12.00	11.30	0.00

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Kenya's Exports to the EU, Japan and USA

Market and Product	Imports	Tariff Rate(%)				
	1988 (\$ '000)	Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	481,841	0.02	0.02	5.96	3.43	2.53
Fish and Fish Products	6,810	0.00	0.00	13.74	10.72	3.02
Wood, Pulp, Paper and Furniture	692	0.00	0.00	3.66	0.00	3.66
Textiles and Clothing	11,285	0.00	0.00	2.42	1.87	0.55
Leather, Rubber, Footwear	45,257	0.00	0.00	2.25	1.78	0.47
Metals	876	0.00	0.00	0.41	0.25	0.16
Chemical & Photographic Suppl.	853	0.00	0.00	2.45	1.09	1.36
Transport Equipment	582	0.00	0.00	5.76	3.49	2.27
Non - Electric Machinery	2,687	0.00	0.00	1.38	0.25	1.13
Electric Machinery	690	0.00	0.00	6.61	4.32	2.29
Mineral Prod.,Prec. Stones&Metal	22,429	0.00	0.00	0.04	0.02	0.03
Manufactured Articles nes.	11,986	0.00	0.00	1.65	1.01	0.63
<u>Japan</u>						
Agriculture excluding Fish	8,577	2.00	1.71	2.91	1.77	0.85
Fish and Fish Products	2,034	4.94	3.43	4.94	3.43	0.00
Wood, Pulp, Paper and Furniture	219	0.00	0.00	3.14	0.04	3.11
Textiles and Clothing	2,250	0.04	0.04	0.18	0.10	0.08
Metals	376	0.00	0.00	0.00	0.00	0.00
Chemical & Photographic Suppl.	957	0.00	0.00	0.06	0.05	0.01
Mineral Prod.,Prec. Stones&Metal	1,321	0.00	0.00	0.12	0.09	0.03
Manufactured Articles nes.	308	0.88	0.88	5.16	4.10	1.07
<u>United States</u>						
Agriculture excluding Fish	48,796	0.00	0.00	0.14	0.10	0.04
Fish and Fish Products	477	0.00	0.00	0.00	0.00	0.00
Wood, Pulp, Paper and Furniture	1,339	0.00	0.00	4.66	2.20	2.47
Textiles and Clothing	1,910	10.85	9.30	14.07	11.53	0.99
Leather, Rubber, Footwear	2,271	5.31	5.29	6.13	6.00	0.11
Metals	382	1.84	1.51	6.16	3.32	2.51
Chemical & Photographic Suppl.	274	0.26	0.21	2.01	1.06	0.90
Transport Equipment	13	0.00	0.00	0.00	0.00	0.00
Non - Electric Machinery	634	0.00	0.00	2.99	1.35	1.64
Electric Machinery	2,407	0.02	0.00	4.52	0.40	4.10
Mineral Prod.,Prec. Stones&Metal	3,908	0.00	0.00	2.71	1.10	1.61
Manufactured Articles nes.	2,612	0.94	0.94	5.41	3.66	1.75

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Lesotho's Exports to the EU, Japan and USA

Market and Product	Imports 1988 (\$ '000)	Tariff Rate(%)				
		Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	1,254	0.00	0.00	21.73	17.30	4.43
Wood, Pulp, Paper and Furniture	6	0.00	0.00	12.00	0.00	12.00
Textiles and Clothing	4,423	0.00	0.00	13.40	11.67	1.73
Leather, Rubber, Footwear	398	0.00	0.00	7.76	7.19	0.57
Metals	12	0.00	0.00	5.00	5.00	0.00
Transport Equipment	25	0.00	0.00	4.40	1.70	2.70
Non - Electric Machinery	321	0.00	0.00	5.42	3.53	1.89
Electric Machinery	2	0.00	0.00	8.00	4.00	4.00
Mineral Prod.,Prec. Stones&Metal	16,370	0.00	0.00	0.01	0.00	0.00
Manufactured Articles nes.	202	0.00	0.00	2.62	1.24	1.38
<u>Japan</u>						
Agriculture excluding Fish	46	18.00	16.00	18.00	16.00	0.00
Textiles and Clothing	123	0.00	0.00	12.00	10.05	1.95
<u>United States</u>						
Agriculture excluding Fish	44	0.00	0.00	4.77	2.20	2.58
Wood, Pulp, Paper and Furniture	3	0.00	0.00	0.00	0.00	0.00
Textiles and Clothing	17,454	19.45	17.55	19.45	17.55	0.00
Leather, Rubber, Footwear	14	0.00	0.00	5.00	4.00	1.00
Chemical & Photographic Suppl.	53	0.00	0.00	1.64	1.64	0.00
Mineral Prod.,Prec. Stones&Metal	1,124	0.00	0.00	0.03	0.01	0.02
Manufactured Articles nes.	173	1.50	1.50	7.91	7.83	0.08

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Liberia's Exports to the EU, Japan and USA

Market and Product	Imports	Tariff Rate(%)				
	1988 (\$ '000)	Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	14,918	0.02	0.01	3.71	0.38	3.32
Fish and Fish Products	55	0.00	0.00	6.24	4.97	1.27
Wood, Pulp, Paper and Furniture	126,256	0.00	0.00	0.05	0.03	0.02
Textiles and Clothing	85	0.00	0.00	10.49	8.05	2.44
Leather, Rubber, Footwear	28,459	0.00	0.00	0.04	0.03	0.02
Metals	337,749	0.00	0.00	0.00	0.00	0.00
Chemical & Photographic Suppl.	595	0.00	0.00	8.50	5.32	3.17
Transport Equipment	135	0.00	0.00	6.27	5.78	0.50
Non - Electric Machinery	842	0.00	0.00	6.01	0.26	5.75
Electric Machinery	151	0.00	0.00	10.40	2.81	7.59
Mineral Prod.,Prec. Stones&Metal	278,671	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	8,668	0.00	0.00	0.08	0.05	0.03
<u>Japan</u>						
Wood, Pulp, Paper and Furniture	2	0.00	0.00	1.00	0.00	1.00
Metals	6,421	0.00	0.00	0.00	0.00	0.00
Transport Equipment	465	0.00	0.00	0.00	0.00	0.00
Non - Electric Machinery	2	0.00	0.00	0.00	0.00	0.00
Mineral Prod.,Prec. Stones&Metal	115	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	25,499	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	137	0.66	0.53	3.09	1.66	1.31
Fish and Fish Products	42	0.41	0.00	0.41	0.00	0.00
Wood, Pulp, Paper and Furniture	116	0.00	0.00	0.92	0.37	0.55
Textiles and Clothing	5	15.90	14.46	15.90	14.46	0.00
Leather, Rubber, Footwear	68,489	0.00	0.00	0.00	0.00	0.00
Metals	2,982	0.00	0.00	0.00	0.00	0.00
Chemical & Photographic Suppl.	1,185	0.00	0.00	0.29	0.00	0.29
Non - Electric Machinery	13	0.00	0.00	1.42	0.77	0.65
Electric Machinery	151	0.00	0.00	3.69	1.00	2.69
Mineral Prod.,Prec. Stones&Metal	33,336	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	43	0.00	0.00	2.12	0.00	2.12

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Madagascar's Exports to the EU, Japan and USA

Market and Product	Imports	Tariff Rate(%)				Margin Reduction
	1988 (\$ '000)	Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	
<u>European Union</u>						
Agriculture excluding Fish	124,181	0.00	0.00	5.21	1.42	3.79
Fish and Fish Products	21,257	0.00	0.00	18.29	12.51	5.78
Wood, Pulp, Paper and Furniture	83	0.00	0.00	6.61	0.23	6.39
Textiles and Clothing	23,227	0.00	0.00	8.55	7.00	1.55
Leather, Rubber, Footwear	2,476	0.00	0.00	6.46	5.84	0.62
Metals	377	0.00	0.00	2.98	2.10	0.88
Chemical & Photographic Suppl.	13	0.00	0.00	6.32	3.00	3.32
Transport Equipment	84	0.00	0.00	9.67	9.52	0.15
Non - Electric Machinery	251	0.00	0.00	4.47	2.05	2.42
Electric Machinery	149	0.00	0.00	5.15	2.91	2.25
Mineral Prod.,Prec. Stones&Metal	9,876	0.00	0.00	0.04	0.02	0.02
Manufactured Articles nes.	6,692	0.00	0.00	0.71	0.40	0.31
<u>Japan</u>						
Agriculture excluding Fish	8,416	0.02	0.02	0.30	0.02	0.28
Fish and Fish Products	24,801	3.00	1.00	3.00	1.00	0.00
Wood, Pulp, Paper and Furniture	285	0.00	0.00	0.43	0.00	0.43
Metals	8,152	0.00	0.00	0.00	0.00	0.00
Mineral Prod.,Prec. Stones&Metal	1,073	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	70	0.00	0.00	1.74	0.24	1.50
<u>United States</u>						
Agriculture excluding Fish	30,744	0.00	0.00	0.01	0.01	0.00
Fish and Fish Products	939	0.00	0.00	0.00	0.00	0.00
Wood, Pulp, Paper and Furniture	142	0.00	0.00	2.80	0.93	1.87
Textiles and Clothing	423	6.96	6.95	6.96	6.95	0.00
Metals	3	0.00	0.00	6.20	6.20	0.00
Chemical & Photographic Suppl.	1	0.00	0.00	6.50	6.50	0.00
Electric Machinery	164	0.00	0.00	4.54	3.29	1.25
Mineral Prod.,Prec. Stones&Metal	4,021	0.00	0.00	0.17	0.08	0.09
Manufactured Articles nes.	906	0.00	0.00	3.05	1.80	1.25

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Malawi's Exports to the EU, Japan and USA

Market and Product	Imports	Tariff Rate(%)				
	1988 (\$ '000)	Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	119,094	0.00	0.00	12.36	9.71	2.65
Fish and Fish Products	250	0.00	0.00	1.13	0.71	0.41
Wood, Pulp, Paper and Furniture	332	0.00	0.00	5.43	0.29	5.14
Textiles and Clothing	8,023	0.00	0.00	10.13	8.13	2.00
Leather, Rubber, Footwear	50	0.00	0.00	19.04	16.28	2.76
Metals	47	0.00	0.00	1.76	0.08	1.68
Chemical & Photographic Suppl.	7	0.00	0.00	6.90	0.00	6.90
Non - Electric Machinery	450	0.00	0.00	0.66	0.22	0.45
Electric Machinery	109	0.00	0.00	4.72	3.21	1.52
Mineral Prod.,Prec. Stones&Metal	37	0.00	0.00	0.59	0.32	0.27
Manufactured Articles nes.	1,174	0.00	0.00	0.86	0.35	0.51
<u>Japan</u>						
Agriculture excluding Fish	37,175	0.00	0.00	0.02	0.00	0.02
Fish and Fish Products	52	0.00	0.00	3.75	1.70	2.05
<u>United States</u>						
Agriculture excluding Fish	27,343	0.10	0.05	0.10	0.05	0.00
Fish and Fish Products	17	0.00	0.00	0.00	0.00	0.00
Wood, Pulp, Paper and Furniture	15	0.00	0.00	4.54	1.28	3.26
Textiles and Clothing	3,237	18.73	16.40	18.73	16.40	0.00
Chemical & Photographic Suppl.	21	0.00	0.00	0.00	0.00	0.00
Electric Machinery	23	2.77	0.00	5.91	2.72	0.43
Manufactured Articles nes.	53	8.66	8.66	9.00	8.83	0.17

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Mali's Exports to the EU, Japan and USA

Market and Product	Imports 1988 (\$ '000)	Tariff Rate(%)				
		Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	6,142	0.08	0.08	5.09	2.06	3.03
Fish and Fish Products	68	0.00	0.00	13.91	13.24	0.67
Wood, Pulp, Paper and Furniture	33	0.00	0.00	7.09	0.42	6.67
Textiles and Clothing	604	0.00	0.00	13.77	11.80	1.97
Leather, Rubber, Footwear	284	0.00	0.00	0.51	0.37	0.14
Metals	90	0.00	0.00	3.47	1.49	1.98
Chemical & Photographic Suppl.	54	0.00	0.00	9.19	5.17	4.02
Transport Equipment	230	0.00	0.00	10.54	10.24	0.31
Non - Electric Machinery	5,519	0.00	0.00	0.19	0.08	0.10
Electric Machinery	835	0.00	0.00	6.83	4.25	2.58
Mineral Prod.,Prec. Stones&Metal	12,989	0.00	0.00	0.02	0.01	0.01
Manufactured Articles nes.	40,469	0.00	0.00	0.02	0.00	0.01
<u>Japan</u>						
Wood, Pulp, Paper and Furniture	14	0.00	0.00	4.87	2.90	1.97
Textiles and Clothing	2	0.00	0.00	8.40	4.20	4.20
Mineral Prod.,Prec. Stones&Metal	5	0.00	0.00	9.00	9.00	0.00
Manufactured Articles nes.	748	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	115	0.00	0.00	7.68	5.39	2.30
Wood, Pulp, Paper and Furniture	95	0.00	0.00	4.45	1.82	2.63
Textiles and Clothing	20	14.62	12.32	16.14	13.68	0.16
Leather, Rubber, Footwear	103	0.27	0.27	3.91	0.68	3.23
Metals	4	0.00	0.00	4.50	0.75	3.75
Chemical & Photographic Suppl.	389	0.00	0.00	3.63	3.63	0.00
Non - Electric Machinery	5,214	0.00	0.00	2.20	0.00	2.20
Electric Machinery	104	0.00	0.00	16.93	8.48	8.45
Mineral Prod.,Prec. Stones&Metal	105	0.18	0.08	7.01	3.84	3.08
Manufactured Articles nes.	687	0.00	0.00	0.60	0.06	0.54

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Mauritania's Exports to the EU, Japan and USA

Market and Product	Imports 1988 (\$ '000)	Tariff Rate(%)				
		Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	1,087	0.05	0.04	0.62	0.33	0.28
Fish and Fish Products	37,881	0.00	0.00	11.55	9.13	2.42
Wood, Pulp, Paper and Furniture	1	0.00	0.00	0.00	0.00	0.00
Textiles and Clothing	226	0.00	0.00	12.37	10.75	1.62
Leather, Rubber, Footwear	27	0.00	0.00	17.32	14.54	2.78
Metals	164,091	0.00	0.00	0.00	0.00	0.00
Chemical & Photographic Suppl.	1,309	0.00	0.00	10.34	5.55	4.80
Transport Equipment	209	0.00	0.00	4.28	3.58	0.70
Non - Electric Machinery	909	0.00	0.00	4.04	2.36	1.68
Electric Machinery	95	0.00	0.00	5.55	2.80	2.75
Mineral Prod.,Prec. Stones&Metal	37	0.00	0.00	7.46	6.35	1.11
Manufactured Articles nes.	951	0.00	0.00	0.51	0.27	0.23
<u>Japan</u>						
Fish and Fish Products	183,361	0.52	0.34	11.68	6.59	4.91
Metals	2,253	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Metals	10,132	0.00	0.00	0.00	0.00	0.00
Transport Equipment	2	0.00	0.00	3.90	3.10	0.80
Non - Electric Machinery	1	0.00	0.00	0.00	0.00	0.00
Electric Machinery	2	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	13	0.00	0.00	6.65	1.85	4.80

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Mauritius's Exports to the EU, Japan and USA

Market and Product	Imports	Tariff Rate(%)				
	1988 (\$ '000)	Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	287,315	1.81	1.38	6.50	4.28	1.79
Fish and Fish Products	13,558	0.00	0.00	23.54	23.36	0.18
Wood, Pulp, Paper and Furniture	1,237	0.00	0.00	5.63	0.00	5.63
Textiles and Clothing	353,945	0.00	0.00	13.28	11.63	1.65
Leather, Rubber, Footwear	3,232	0.00	0.00	7.86	6.09	1.77
Metals	1,264	0.00	0.00	5.20	2.91	2.29
Chemical & Photographic Suppl.	396	0.00	0.00	6.67	5.78	0.89
Transport Equipment	140	0.00	0.00	8.11	7.19	0.92
Non - Electric Machinery	770	0.00	0.00	4.40	2.06	2.34
Electric Machinery	430	0.00	0.00	5.47	3.06	2.42
Mineral Prod.,Prec. Stones&Metal	17,171	0.00	0.00	0.32	0.20	0.12
Manufactured Articles nes.	19,072	0.00	0.00	6.44	3.99	2.45
<u>Japan</u>						
Agriculture excluding Fish	390	0.00	0.00	0.85	0.82	0.03
Fish and Fish Products	1,603	5.17	3.68	5.17	3.68	0.00
Wood, Pulp, Paper and Furniture	39	0.00	0.00	3.20	0.00	3.20
Textiles and Clothing	181	7.27	7.27	14.53	10.30	4.23
Metals	81	0.00	0.00	0.00	0.00	0.00
Chemical & Photographic Suppl.	187	0.00	0.00	4.60	3.90	0.70
Non - Electric Machinery	6	0.00	0.00	0.00	0.00	0.00
Mineral Prod.,Prec. Stones&Metal	12	0.00	0.00	5.60	3.70	1.90
Manufactured Articles nes.	242	0.00	0.00	3.52	2.73	0.78
<u>United States</u>						
Agriculture excluding Fish	11,466	0.66	0.54	5.03	3.98	0.93
Fish and Fish Products	7,624	0.00	0.00	0.00	0.00	0.00
Wood, Pulp, Paper and Furniture	374	0.00	0.00	3.88	0.02	3.86
Textiles and Clothing	122,249	18.30	16.74	18.31	16.75	0.00
Leather, Rubber, Footwear	277	7.18	7.07	7.26	7.11	0.03
Metals	1,906	0.81	0.00	1.22	0.24	0.17
Chemical & Photographic Suppl.	326	0.06	0.02	4.43	4.34	0.05
Transport Equipment	476	0.00	0.00	3.63	1.57	2.06
Non - Electric Machinery	2,099	0.00	0.00	2.09	0.22	1.88
Electric Machinery	394	0.00	0.00	3.93	2.53	1.41
Mineral Prod.,Prec. Stones&Metal	3,284	0.00	0.00	4.24	3.55	0.69
Manufactured Articles nes.	6,180	0.20	0.19	6.73	2.21	4.51

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Mayotte's Exports to the EU, Japan and USA

Market and Product	Imports	Tariff Rate(%)				
	1988 (\$ '000)	Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
European Union						
Agriculture excluding Fish	425	10.11	5.22	10.49	5.22	0.38
Wood, Pulp, Paper and Furniture	271	0.04	0.00	4.62	2.75	1.83
Textiles and Clothing	41	0.00	0.00	13.81	8.00	5.81
Leather, Rubber, Footwear	2	0.00	0.00	3.67	2.50	1.17
Metals	2	0.00	0.00	5.60	2.70	2.90
Chemical & Photographic Suppl.	7	0.00	0.00	4.00	4.00	0.00
Transport Equipment	24	0.00	0.00	9.31	8.77	0.54
Non - Electric Machinery	77	0.00	0.00	3.96	2.21	1.75
Electric Machinery	282	0.00	0.00	6.94	5.13	1.81
Mineral Prod.,Prec. Stones&Metal	8	0.00	0.00	8.75	5.00	3.75
Manufactured Articles nes.	1,784	0.00	0.00	0.38	0.23	0.15

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Mozambique's Exports to the EU, Japan and USA

Market and Product	Imports	Tariff Rate(%)				
	1988 (\$ '000)	Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	10,923	0.00	0.00	1.65	1.30	0.35
Fish and Fish Products	40,513	0.00	0.00	17.93	11.96	5.97
Wood, Pulp, Paper and Furniture	1,365	0.00	0.00	1.94	0.11	1.83
Textiles and Clothing	1,366	0.00	0.00	6.70	4.91	1.79
Leather, Rubber, Footwear	126	0.00	0.00	4.13	2.58	1.55
Metals	11,178	0.00	0.00	0.70	0.00	0.70
Chemical & Photographic Suppl.	152	0.00	0.00	5.39	4.83	0.56
Transport Equipment	71	0.00	0.00	10.01	10.00	0.01
Non - Electric Machinery	301	0.00	0.00	3.98	1.25	2.73
Electric Machinery	153	0.00	0.00	6.06	4.71	1.35
Mineral Prod.,Prec. Stones&Metal	207	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	3,215	0.00	0.00	0.46	0.19	0.27
<u>Japan</u>						
Agriculture excluding Fish	1,607	0.00	0.00	0.00	0.00	0.00
Fish and Fish Products	18,866	3.00	1.00	3.00	1.00	0.00
Wood, Pulp, Paper and Furniture	615	0.00	0.00	0.42	0.00	0.42
Textiles and Clothing	7	0.00	0.00	0.00	0.00	0.00
Metals	4,107	0.00	0.00	0.00	0.00	0.00
Mineral Prod.,Prec. Stones&Metal	230	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	5	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	16,245	0.20	0.17	0.24	0.20	0.01
Fish and Fish Products	269	0.00	0.00	0.00	0.00	0.00
Wood, Pulp, Paper and Furniture	48	0.00	0.00	2.45	0.00	2.45
Textiles and Clothing	617	3.93	3.59	3.93	3.59	0.00
Leather, Rubber, Footwear	45	6.28	6.28	8.78	8.02	0.76
Metals	207	0.00	0.00	3.65	1.98	1.67
Chemical & Photographic Suppl.	74	0.00	0.00	0.23	0.22	0.01
Transport Equipment	130	0.00	0.00	7.79	7.72	0.08
Non - Electric Machinery	4	0.00	0.00	5.70	3.90	1.80
Electric Machinery	157	0.00	0.00	4.08	3.38	0.70
Mineral Prod.,Prec. Stones&Metal	96	1.25	0.94	5.16	4.28	0.57
Manufactured Articles nes.	237	0.00	0.00	0.00	0.00	0.00

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Namibia's Exports to the EU, Japan and USA

Market and Product	Imports	Tariff Rate(%)				
	1988 (\$ '000)	Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>Japan</u>						
Fish and Fish Products	22,196	3.01	1.02	3.01	1.02	0.00
Metals	1,281	0.00	0.00	0.00	0.00	0.00
Mineral Prod.,Prec. Stones&Metal	158	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	26	0.00	0.00	6.06	6.06	0.00
Fish and Fish Products	101	0.00	0.00	0.00	0.00	0.00
Wood, Pulp, Paper and Furniture	78	0.00	0.00	0.00	0.00	0.00
Metals	337	0.00	0.00	0.00	0.00	0.00
Non - Electric Machinery	58	0.00	0.00	4.20	0.00	4.20
Mineral Prod.,Prec. Stones&Metal	88	0.00	0.00	1.38	1.13	0.26
Manufactured Articles nes.	510	0.00	0.00	0.00	0.00	0.00

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Niger's Exports to the EU, Japan and USA

Market and Product	Imports	Tariff Rate(%)				
	1988 (\$ '000)	Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	666	0.00	0.00	5.42	3.28	2.13
Fish and Fish Products	346	0.00	0.00	16.34	15.00	1.34
Wood, Pulp, Paper and Furniture	34	0.00	0.00	1.51	0.00	1.51
Textiles and Clothing	156	0.00	0.00	9.59	7.65	1.94
Leather, Rubber, Footwear	763	0.00	0.00	3.26	2.55	0.71
Metals	918	0.00	0.00	1.55	0.12	1.43
Chemical & Photographic Suppl.	57,682	0.00	0.00	7.04	5.08	1.96
Transport Equipment	131	0.00	0.00	9.66	8.47	1.19
Non - Electric Machinery	358	0.00	0.00	4.16	0.94	3.22
Electric Machinery	117	0.00	0.00	10.22	3.42	6.80
Mineral Prod.,Prec. Stones&Metal	488	0.00	0.00	5.94	4.86	1.08
Manufactured Articles nes.	4,234	0.00	0.00	0.77	0.38	0.39
<u>Japan</u>						
Manufactured Articles nes.	2	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	590	0.00	0.00	6.00	3.85	2.15
Fish and Fish Products	140	0.99	0.99	0.99	0.99	0.00
Wood, Pulp, Paper and Furniture	41	0.00	0.00	3.59	0.00	3.59
Textiles and Clothing	115	7.26	6.11	11.34	9.43	0.77
Leather, Rubber, Footwear	12	0.67	0.67	4.35	4.35	0.00
Metals	2,595	0.00	0.00	1.02	0.99	0.03
Chemical & Photographic Suppl.	449	0.00	0.00	7.13	5.92	1.21
Transport Equipment	1	0.00	0.00	3.10	2.50	0.60
Non - Electric Machinery	105	0.00	0.00	2.65	1.18	1.47
Electric Machinery	56	0.00	0.00	1.52	0.88	0.64
Mineral Prod.,Prec. Stones&Metal	378	0.00	0.00	0.28	0.09	0.19
Manufactured Articles nes.	112	0.00	0.00	4.32	0.15	4.17

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Nigeria's Exports to the EU, Japan and USA

Market and Product	Imports 1988 (\$ '000)	Tariff Rate(%)				
		Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	318,980	0.00	0.00	3.10	0.56	2.53
Fish and Fish Products	4,275	0.00	0.00	14.91	10.81	4.10
Wood, Pulp, Paper and Furniture	4,705	0.00	0.00	1.06	0.05	1.01
Textiles and Clothing	293	0.00	0.00	7.88	5.83	2.04
Leather, Rubber, Footwear	82,861	0.00	0.00	1.46	1.06	0.41
Metals	14,246	0.00	0.00	0.61	0.18	0.43
Chemical & Photographic Suppl.	5,605	0.00	0.00	10.51	5.44	5.07
Transport Equipment	57,983	0.00	0.00	0.16	0.11	0.05
Non - Electric Machinery	2,877	0.00	0.00	4.82	0.64	4.18
Electric Machinery	1,532	0.00	0.00	6.58	4.62	1.96
Mineral Prod.,Prec. Stones&Metal	56,256	0.00	0.00	4.63	2.74	1.90
Manufactured Articles nes.	33,060	0.00	0.00	0.11	0.05	0.06
<u>Japan</u>						
Agriculture excluding Fish	162	1.42	0.99	1.42	0.99	0.00
Fish and Fish Products	4,323	3.00	1.00	3.00	1.00	0.00
Wood, Pulp, Paper and Furniture	36	2.75	1.17	2.75	1.17	0.00
Leather, Rubber, Footwear	19	0.00	0.00	0.00	0.00	0.00
Metals	253	0.00	0.00	0.05	0.00	0.05
Manufactured Articles nes.	318	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	61,891	0.00	0.00	0.00	0.00	0.00
Fish and Fish Products	7,210	0.00	0.00	0.00	0.00	0.00
Wood, Pulp, Paper and Furniture	70	0.00	0.00	2.25	1.20	1.05
Textiles and Clothing	3,831	9.00	8.91	9.00	8.91	0.00
Leather, Rubber, Footwear	5,260	0.02	0.02	0.02	0.02	0.00
Metals	4	0.00	0.00	5.90	4.65	1.25
Chemical & Photographic Suppl.	174	0.00	0.00	4.92	0.14	4.78
Non - Electric Machinery	280	0.00	0.00	0.85	0.38	0.47
Electric Machinery	22	0.00	0.00	3.71	1.81	1.91
Mineral Prod.,Prec. Stones&Metal	8,001	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	1,670	0.00	0.00	0.28	0.06	0.22

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Reunion's Exports to the EU, Japan and USA

Market and Product	Imports 1988 (\$ '000)	Tariff Rate(%)				
		Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	137,532	10.96	6.68	10.96	6.68	0.00
Fish and Fish Products	1,126	15.61	15.13	15.61	15.13	0.00
Wood, Pulp, Paper and Furniture	405	2.95	0.08	2.95	0.08	0.00
Textiles and Clothing	225	1.41	1.10	13.37	11.28	1.77
Leather, Rubber, Footwear	96	6.57	4.59	6.57	4.59	0.00
Metals	558	2.84	1.46	2.84	1.46	0.00
Chemical & Photographic Suppl.	465	5.92	2.80	5.92	2.80	0.00
Transport Equipment	544	6.60	5.67	6.60	5.67	0.00
Non - Electric Machinery	1,804	4.18	0.92	4.18	0.92	0.00
Electric Machinery	1,199	6.56	4.07	6.56	4.07	0.00
Mineral Prod.,Prec. Stones&Metal	623	1.72	1.14	1.72	1.14	0.00
Manufactured Articles nes.	4,174	2.99	0.75	2.99	0.75	0.00
<u>Japan</u>						
Agriculture excluding Fish	181	0.44	0.00	10.52	5.45	4.63
Fish and Fish Products	4,620	3.13	1.25	3.13	1.25	0.00
Chemical & Photographic Suppl.	85	5.60	0.00	5.60	0.00	0.00
Manufactured Articles nes.	30	2.93	0.00	2.93	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	10	2.90	1.47	2.90	1.47	0.00
Fish and Fish Products	3,997	0.00	0.00	0.00	0.00	0.00
Chemical & Photographic Suppl.	8	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	182	0.00	0.00	0.00	0.00	0.00

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Rwanda's Exports to the EU, Japan and USA

Market and Product	Imports	Tariff Rate(%)				Margin Reduction
	1988 (\$ '000)	Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	
<u>European Union</u>						
Agriculture excluding Fish	112,185	0.00	0.00	4.02	0.22	3.80
Wood, Pulp, Paper and Furniture	312	0.00	0.00	1.06	0.00	1.06
Textiles and Clothing	38	0.00	0.00	6.76	6.24	0.53
Leather, Rubber, Footwear	21	0.00	0.00	20.00	17.00	3.00
Metals	13	0.00	0.00	5.19	3.15	2.04
Chemical & Photographic Suppl.	282	0.00	0.00	7.87	4.61	3.26
Non - Electric Machinery	104	0.00	0.00	2.96	2.45	0.51
Electric Machinery	75	0.00	0.00	6.95	3.41	3.55
Mineral Prod.,Prec. Stones&Metal	328	0.00	0.00	0.24	0.13	0.11
Manufactured Articles nes.	6,203	0.00	0.00	0.06	0.04	0.02
<u>Japan</u>						
Agriculture excluding Fish	377	0.00	0.00	0.00	0.00	0.00
Metals	235	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	6,758	0.00	0.00	0.00	0.00	0.00
Wood, Pulp, Paper and Furniture	3	0.00	0.00	3.40	2.13	1.27
Textiles and Clothing	18	0.00	0.00	3.70	0.00	3.70
Mineral Prod.,Prec. Stones&Metal	25	27.60	20.10	27.60	20.10	0.00

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Sao Tome and Principe's Exports to the EU, Japan and U

Market and Product	Imports	Tariff Rate(%)				
	1988 (\$ '000)	Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	9,241	0.00	0.00	2.84	0.01	2.84
Fish and Fish Products	2,171	0.00	0.00	22.00	20.32	1.68
Wood, Pulp, Paper and Furniture	21	0.00	0.00	9.19	0.00	9.19
Textiles and Clothing	41	0.00	0.00	12.40	10.46	1.93
Metals	1	0.00	0.00	4.90	2.70	2.20
Chemical & Photographic Suppl.	9	0.00	0.00	5.30	0.00	5.30
Non - Electric Machinery	10	0.00	0.00	5.24	1.57	3.67
Mineral Prod.,Prec. Stones&Metal	209	0.00	0.00	1.50	0.70	0.80
Manufactured Articles nes.	100	0.00	0.00	10.89	4.16	6.73
<u>Japan</u>						
Fish and Fish Products	2	5.00	3.50	5.00	3.50	0.00
<u>United States</u>						
Agriculture excluding Fish	10					
Fish and Fish Products	6	0.00	0.00	0.00	0.00	0.00
Wood, Pulp, Paper and Furniture	4	0.00	0.00	2.50	0.00	2.50
Leather, Rubber, Footwear	6	0.00	0.00	5.30	2.70	2.60
Electric Machinery	143	0.00	0.00	6.00	6.00	0.00

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Senegal's Exports to the EU, Japan and USA

Market and Product	Imports	Tariff Rate(%)				
	1988 (\$ '000)	Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	155,150	0.02	0.02	6.03	3.92	2.11
Fish and Fish Products	197,886	0.00	0.00	18.73	16.32	2.40
Wood, Pulp, Paper and Furniture	586	0.00	0.00	3.04	0.07	2.97
Textiles and Clothing	2,577	0.00	0.00	7.44	5.57	1.87
Leather, Rubber, Footwear	725	0.00	0.00	5.37	4.77	0.60
Metals	3,981	0.00	0.00	0.10	0.05	0.05
Chemical & Photographic Suppl.	191	0.00	0.00	5.98	3.81	2.16
Transport Equipment	1,803	0.00	0.00	8.08	7.67	0.41
Non - Electric Machinery	554	0.00	0.00	4.94	2.30	2.64
Electric Machinery	126	0.00	0.00	4.61	2.88	1.72
Mineral Prod.,Prec. Stones&Metal	73,735	0.00	0.00	1.07	1.00	0.07
Manufactured Articles nes.	7,741	0.00	0.00	0.50	0.23	0.26
<u>Japan</u>						
Agriculture excluding Fish	28	0.00	0.00	0.00	0.00	0.00
Fish and Fish Products	10,736	4.89	3.68	6.71	4.17	1.34
Mineral Prod.,Prec. Stones&Metal	6,138	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	1,692	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	408	0.00	0.00	3.20	1.85	1.35
Fish and Fish Products	296	0.00	0.00	0.02	0.02	0.00
Wood, Pulp, Paper and Furniture	247	0.00	0.00	0.25	0.09	0.16
Textiles and Clothing	94	16.24	14.80	17.53	15.10	0.99
Leather, Rubber, Footwear	17	35.61	35.61	35.61	35.61	0.00
Metals	34	0.00	0.00	0.17	0.12	0.05
Chemical & Photographic Suppl.	7	0.00	0.00	6.30	6.30	0.00
Non - Electric Machinery	987	0.00	0.00	0.98	0.67	0.31
Electric Machinery	636	0.49	0.02	4.35	2.87	1.00
Mineral Prod.,Prec. Stones&Metal	202	0.00	0.00	4.45	3.76	0.69
Manufactured Articles nes.	275	0.00	0.00	2.86	0.02	2.84

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Seychelles's Exports to the EU, Japan and USA

Market and Product	Imports	Tariff Rate(%)				
	1988 (\$ '000)	Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	153	0.00	0.00	0.39	0.00	0.39
Fish and Fish Products	115,828	0.00	0.00	22.17	21.78	0.39
Wood, Pulp, Paper and Furniture	27	0.00	0.00	5.91	0.00	5.91
Textiles and Clothing	63	0.00	0.00	10.32	6.16	4.16
Metals	96	0.00	0.00	4.44	2.19	2.25
Chemical & Photographic Suppl.	31	0.00	0.00	1.51	0.84	0.67
Transport Equipment	17	0.00	0.00	6.22	5.61	0.61
Non - Electric Machinery	479	0.00	0.00	4.13	1.43	2.70
Electric Machinery	182	0.00	0.00	5.39	3.69	1.71
Manufactured Articles nes.	606	0.00	0.00	8.15	3.56	4.59
<u>Japan</u>						
Agriculture excluding Fish	18	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	80	0.00	0.00	0.00	0.00	0.00
Fish and Fish Products	2,389	0.01	0.01	0.01	0.01	0.00
Wood, Pulp, Paper and Furniture	18	0.00	0.00	6.60	0.00	6.60
Textiles and Clothing	26	3.00	0.00	3.00	0.00	0.00
Leather, Rubber, Footwear	19	0.00	0.00	4.07	3.74	0.33
Metals	1	0.00	0.00	5.30	5.30	0.00
Chemical & Photographic Suppl.	1	0.00	0.00	4.90	4.90	0.00
Transport Equipment	57	0.00	0.00	0.00	0.00	0.00
Non - Electric Machinery	882	0.00	0.00	3.83	1.12	2.71
Electric Machinery	456	0.18	0.18	4.88	2.67	2.21
Mineral Prod.,Prec. Stones&Metal	13	0.00	0.00	0.62	0.31	0.31
Manufactured Articles nes.	384	0.00	0.00	4.13	0.83	3.30

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Sierra Leone's Exports to the EU, Japan and USA

Market and Product	Imports 1988 (\$ '000)	Tariff Rate(%)				
		Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	21,978	0.00	0.00	3.39	0.04	3.35
Fish and Fish Products	12,986	0.00	0.00	16.46	11.22	5.23
Wood, Pulp, Paper and Furniture	313	0.00	0.00	0.04	0.00	0.04
Textiles and Clothing	172	0.00	0.00	8.08	7.30	0.78
Leather, Rubber, Footwear	1	0.00	0.00	8.00	3.70	4.30
Metals	54,041	0.00	0.00	0.00	0.00	0.00
Chemical & Photographic Suppl.	9	0.00	0.00	8.40	6.50	1.90
Transport Equipment	90	0.00	0.00	4.33	2.48	1.85
Non - Electric Machinery	144	0.00	0.00	1.07	0.12	0.95
Electric Machinery	311	0.00	0.00	11.10	9.52	1.59
Mineral Prod.,Prec. Stones&Metal	47,062	0.00	0.00	0.01	0.00	0.00
Manufactured Articles nes.	235	0.00	0.00	0.94	0.57	0.37
<u>Japan</u>						
Fish and Fish Products	365	4.22	2.46	5.11	2.96	0.39
Manufactured Articles nes.	8	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	4,086	0.00	0.00	0.02	0.01	0.01
Fish and Fish Products	74	0.00	0.00	0.00	0.00	0.00
Textiles and Clothing	3	21.57	15.43	21.57	15.43	0.00
Metals	29,703	2.04	2.04	2.04	2.04	0.00
Chemical & Photographic Suppl.	2	0.00	0.00	0.00	0.00	0.00
Mineral Prod.,Prec. Stones&Metal	18,568	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	69	0.00	0.00	0.13	0.10	0.03

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Somalia's Exports to the EU, Japan and USA

Market and Product	Imports	Tariff Rate(%)				
	1988 (\$ '000)	Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	32,171	0.00	0.00	19.49	0.13	19.36
Fish and Fish Products	9,223	0.00	0.00	12.63	8.16	4.47
Wood, Pulp, Paper and Furniture	18	0.00	0.00	5.60	0.00	5.60
Textiles and Clothing	17	0.00	0.00	14.00	12.00	2.00
Leather, Rubber, Footwear	1,457	0.00	0.00	0.55	0.41	0.14
Metals	28	0.00	0.00	4.40	0.00	4.40
Chemical & Photographic Suppl.	6	0.00	0.00	5.83	0.83	5.00
Transport Equipment	410	0.00	0.00	18.71	18.70	0.01
Non - Electric Machinery	489	0.00	0.00	3.34	0.53	2.81
Electric Machinery	45	0.00	0.00	2.97	2.47	0.50
Mineral Prod.,Prec. Stones&Metal	39	0.00	0.00	0.09	0.06	0.03
Manufactured Articles nes.	5,842	0.00	0.00	0.32	0.16	0.16
<u>Japan</u>						
Agriculture excluding Fish	2,435	0.00	0.00	0.00	0.00	0.00
Fish and Fish Products	5	3.00	1.00	3.00	1.00	0.00
Manufactured Articles nes.	29	0.00	0.00	5.30	5.00	0.30
<u>United States</u>						
Agriculture excluding Fish	15	0.00	0.00	0.00	0.00	0.00
Fish and Fish Products	79	0.00	0.00	0.00	0.00	0.00
Textiles and Clothing	3	17.70	16.60	17.70	16.60	0.00
Metals	1	0.00	0.00	5.70	2.90	2.80
Non - Electric Machinery	2	0.00	0.00	0.00	0.00	0.00
Mineral Prod.,Prec. Stones&Metal	41	0.00	0.00	5.96	5.18	0.79
Manufactured Articles nes.	4	0.00	0.00	0.00	0.00	0.00

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for South Africa's Exports to the EU, Japan and USA

Market and Product	Imports 1988 (\$ '000)	Tariff Rate(%)				
		Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	675,669	8.29	4.64	8.30	4.64	0.01
Fish and Fish Products	90,607	12.91	11.17	13.75	12.01	0.01
Wood, Pulp, Paper and Furniture	173,594	5.07	0.69	5.07	0.69	0.00
Textiles and Clothing	286,442	0.53	0.41	2.87	2.29	0.45
Leather, Rubber, Footwear	62,147	2.75	2.10	2.75	2.10	0.00
Metals	1,292,316	2.51	1.14	2.51	1.14	0.00
Chemical & Photographic Suppl.	118,510	6.30	4.53	7.21	5.06	0.38
Transport Equipment	37,455	2.88	2.04	2.89	2.05	0.00
Non - Electric Machinery	48,910	3.88	1.16	3.99	1.23	0.03
Electric Machinery	18,861	7.16	3.14	7.16	3.14	0.00
Mineral Prod.,Prec. Stones&Metal	10,917,317	0.03	0.02	0.03	0.02	0.00
Manufactured Articles nes.	210,999	0.48	0.20	0.48	0.20	0.00
<u>Japan</u>						
Agriculture excluding Fish	176,899	6.25	3.19	7.43	4.21	0.16
Fish and Fish Products	18,160	3.20	1.27	3.20	1.27	0.00
Wood, Pulp, Paper and Furniture	96,438	0.46	0.14	0.46	0.14	0.00
Textiles and Clothing	64,508	0.13	0.11	1.35	0.11	1.22
Leather, Rubber, Footwear	9,140	0.18	0.13	0.19	0.13	0.01
Metals	687,029	2.45	1.52	2.45	1.52	0.00
Chemical & Photographic Suppl.	65,312	0.73	0.58	0.73	0.58	0.00
Transport Equipment	15,009	0.00	0.00	0.00	0.00	0.00
Non - Electric Machinery	469	0.00	0.00	0.00	0.00	0.00
Electric Machinery	123	0.00	0.00	0.00	0.00	0.00
Mineral Prod.,Prec. Stones&Metal	750,468	0.02	0.02	0.02	0.02	0.00
Manufactured Articles nes.	40,209	0.01	0.00	0.01	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	1,230	0.36	0.12	0.36	0.12	0.00
Fish and Fish Products	104	0.00	0.00	0.00	0.00	0.00
Wood, Pulp, Paper and Furniture	82,748	0.40	0.01	0.41	0.01	0.01
Textiles and Clothing	242	8.78	5.94	8.78	5.94	0.00
Leather, Rubber, Footwear	3,851	3.14	2.24	3.32	2.35	0.08
Metals	467,871	1.97	1.93	2.02	1.95	0.04
Chemical & Photographic Suppl.	38,485	5.06	2.91	5.14	2.98	0.01
Transport Equipment	6,688	0.44	0.24	2.43	1.41	0.82
Non - Electric Machinery	31,859	1.97	0.35	2.95	0.77	0.55
Electric Machinery	1,089	2.62	1.39	3.52	1.89	0.40
Mineral Prod.,Prec. Stones&Metal	846,955	0.02	0.01	0.18	0.15	0.02
Manufactured Articles nes.	21,057	0.48	0.21	0.60	0.25	0.07

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Sudan's Exports to the EU, Japan and USA

Market and Product	Imports	Tariff Rate(%)				
	1988 (\$ '000)	Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	156,896	0.00	0.00	1.76	1.12	0.64
Wood, Pulp, Paper and Furniture	45	0.00	0.00	0.39	0.15	0.24
Textiles and Clothing	2,282	0.00	0.00	5.92	3.91	2.01
Leather, Rubber, Footwear	680	0.00	0.00	0.53	0.40	0.13
Metals	1,084	0.00	0.00	0.66	0.60	0.06
Chemical & Photographic Suppl.	13	0.00	0.00	6.98	1.89	5.09
Transport Equipment	3,565	0.00	0.00	0.06	0.06	0.00
Non - Electric Machinery	2,538	0.00	0.00	0.20	0.08	0.13
Electric Machinery	36	0.00	0.00	8.81	6.10	2.71
Mineral Prod.,Prec. Stones&Metal	4,930	0.00	0.00	1.24	1.15	0.09
Manufactured Articles nes.	60,797	0.00	0.00	0.03	0.01	0.02
<u>Japan</u>						
Agriculture excluding Fish	8,943	0.00	0.00	0.03	0.02	0.02
Manufactured Articles nes.	50,502	0.00	0.00	0.01	0.01	0.00
<u>United States</u>						
Agriculture excluding Fish	12,679	0.00	0.00	0.01	0.01	0.00
Wood, Pulp, Paper and Furniture	26	0.00	0.00	1.02	0.00	1.02
Leather, Rubber, Footwear	275	2.96	1.20	2.97	1.21	0.01
Metals	3	0.00	0.00	0.20	0.00	0.20
Chemical & Photographic Suppl.	48	2.25	2.25	2.56	2.25	0.31
Transport Equipment	69	0.00	0.00	0.00	0.00	0.00
Non - Electric Machinery	71	0.00	0.00	0.22	0.18	0.04
Electric Machinery	1	0.00	0.00	6.00	4.80	1.20
Mineral Prod.,Prec. Stones&Metal	15	0.00	0.00	11.00	3.70	7.30
Manufactured Articles nes.	6,114	0.00	0.00	0.01	0.00	0.01

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Swaziland's Exports to the EU, Japan and USA

Market and Product	Imports	Tariff Rate(%)				
	1988 (\$ '000)	Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	111,692	0.41	0.36	13.39	10.76	2.58
Wood, Pulp, Paper and Furniture	8,327	0.00	0.00	4.55	0.80	3.75
Textiles and Clothing	946	0.00	0.00	12.29	11.01	1.28
Leather, Rubber, Footwear	137	0.00	0.00	0.00	0.00	0.00
Metals	770	0.00	0.00	6.10	1.80	4.30
Chemical & Photographic Suppl.	93	0.00	0.00	6.37	5.71	0.65
Transport Equipment	6,276	0.00	0.00	0.03	0.03	0.00
Non - Electric Machinery	27	0.00	0.00	4.43	1.45	2.98
Electric Machinery	25	0.00	0.00	13.72	3.46	10.26
Mineral Prod.,Prec. Stones&Metal	12,535	0.00	0.00	0.01	0.01	0.00
Manufactured Articles nes.	123	0.00	0.00	6.30	2.66	3.63
<u>Japan</u>						
Agriculture excluding Fish	197	17.42	14.72	17.42	14.72	0.00
Wood, Pulp, Paper and Furniture	2,819	0.00	0.00	0.00	0.00	0.00
Metals	75	0.00	0.00	0.00	0.00	0.00
Mineral Prod.,Prec. Stones&Metal	2,962	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	17,690	0.00	0.00	6.65	4.80	1.85
Wood, Pulp, Paper and Furniture	2,498	0.00	0.00	0.05	0.03	0.02
Textiles and Clothing	2,398	13.32	12.29	15.06	13.89	0.14
Leather, Rubber, Footwear	15	1.13	1.13	1.55	1.47	0.08
Metals	1,495	0.00	0.00	5.68	3.81	1.86
Chemical & Photographic Suppl.	39	4.62	1.50	8.33	4.84	0.38
Transport Equipment	1	0.00	0.00	0.00	0.00	0.00
Non - Electric Machinery	395	0.00	0.00	3.62	1.81	1.80
Electric Machinery	78	0.00	0.00	2.83	0.39	2.44
Mineral Prod.,Prec. Stones&Metal	7	0.00	0.00	6.96	2.11	4.84
Manufactured Articles nes.	1,725	0.39	0.18	3.05	1.11	1.72

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Togo's Exports to the EU, Japan and USA

Market and Product	Imports	Tariff Rate(%)				
	1988 (\$ '000)	Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	35,064	0.00	0.00	3.70	0.28	3.42
Fish and Fish Products	5,334	0.00	0.00	18.12	12.01	6.11
Wood, Pulp, Paper and Furniture	396	0.00	0.00	4.30	0.73	3.58
Textiles and Clothing	214	0.00	0.00	12.00	9.79	2.21
Leather, Rubber, Footwear	587	0.00	0.00	5.43	4.11	1.32
Metals	535	0.00	0.00	1.03	0.53	0.50
Chemical & Photographic Suppl.	87	0.00	0.00	9.15	5.11	4.04
Transport Equipment	85	0.00	0.00	11.43	10.83	0.60
Non - Electric Machinery	1,604	0.00	0.00	2.66	0.49	2.16
Electric Machinery	368	0.00	0.00	6.02	3.40	2.62
Mineral Prod.,Prec. Stones&Metal	62,466	0.00	0.00	0.01	0.01	0.00
Manufactured Articles nes.	35,859	0.00	0.00	0.01	0.00	0.01
<u>Japan</u>						
Agriculture excluding Fish	1,424	0.00	0.00	0.42	0.37	0.05
Mineral Prod.,Prec. Stones&Metal	5	0.00	0.00	9.00	5.00	4.00
Manufactured Articles nes.	2	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	1,287	0.00	0.00	0.49	0.22	0.27
Fish and Fish Products	6	0.00	0.00	0.00	0.00	0.00
Wood, Pulp, Paper and Furniture	90	0.00	0.00	5.10	3.20	1.90
Textiles and Clothing	18	6.61	5.56	9.36	8.12	0.18
Leather, Rubber, Footwear	7	0.00	0.00	5.00	5.00	0.00
Metals	13	0.00	0.00	5.11	0.23	4.88
Chemical & Photographic Suppl.	7	0.00	0.00	4.31	4.29	0.03
Electric Machinery	4	0.00	0.00	0.00	0.00	0.00
Mineral Prod.,Prec. Stones&Metal	193	0.00	0.00	2.08	1.43	0.65
Manufactured Articles nes.	86	0.00	0.00	0.00	0.00	0.00

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Uganda's Exports to the EU, Japan and USA

Market and Product	Imports	Tariff Rate(%)				
	1988 (\$ '000)	Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	214,245	0.00	0.00	4.01	0.01	4.00
Fish and Fish Products	24	0.00	0.00	8.50	7.00	1.50
Wood, Pulp, Paper and Furniture	45	0.00	0.00	5.12	0.00	5.12
Textiles and Clothing	52	0.00	0.00	14.00	12.00	2.00
Leather, Rubber, Footwear	46	0.00	0.00	0.48	0.35	0.13
Metals	13	0.00	0.00	6.51	6.19	0.32
Chemical & Photographic Suppl.	51	0.00	0.00	7.02	4.08	2.94
Transport Equipment	106	0.00	0.00	3.29	3.13	0.17
Non - Electric Machinery	47	0.00	0.00	4.21	0.56	3.65
Electric Machinery	3	0.00	0.00	2.17	1.10	1.07
Mineral Prod.,Prec. Stones&Metal	754	0.00	0.00	0.09	0.02	0.07
Manufactured Articles nes.	19,297	0.00	0.00	0.04	0.02	0.02
<u>Japan</u>						
Agriculture excluding Fish	9,892	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	87	0.00	0.00	0.98	0.92	0.06
<u>United States</u>						
Agriculture excluding Fish	39,738	0.00	0.00	0.00	0.00	0.00
Fish and Fish Products	17	0.00	0.00	0.00	0.00	0.00
Textiles and Clothing	7	17.00	16.00	17.00	16.00	0.00
Leather, Rubber, Footwear	12	0.83	0.83	5.21	3.26	1.95
Manufactured Articles nes.	13	0.00	0.00	0.00	0.00	0.00

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for United Rep. of Tanzania's Exports to the EU, Japan and

Market and Product	Imports	Tariff Rate(%)				
	1988 (\$ '000)	Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	120,218	0.00	0.00	5.07	1.45	3.62
Fish and Fish Products	2,415	0.00	0.00	17.32	11.54	5.77
Wood, Pulp, Paper and Furniture	2,629	0.00	0.00	0.73	0.00	0.73
Textiles and Clothing	13,492	0.00	0.00	9.34	8.00	1.34
Leather, Rubber, Footwear	1,087	0.00	0.00	0.35	0.24	0.11
Metals	20,626	0.00	0.00	0.18	0.13	0.05
Chemical & Photographic Suppl.	314	0.00	0.00	1.21	0.45	0.76
Transport Equipment	118	0.00	0.00	12.16	1.91	10.25
Non - Electric Machinery	890	0.00	0.00	3.89	0.79	3.10
Electric Machinery	117	0.00	0.00	6.57	4.03	2.55
Mineral Prod.,Prec. Stones&Metal	4,088	0.00	0.00	0.35	0.11	0.24
Manufactured Articles nes.	34,422	0.00	0.00	0.04	0.02	0.02
<u>Japan</u>						
Agriculture excluding Fish	17,440	0.06	0.00	0.49	0.17	0.25
Fish and Fish Products	1,470	3.00	1.00	3.00	1.00	0.00
Wood, Pulp, Paper and Furniture	2,219	0.00	0.00	0.40	0.00	0.39
Textiles and Clothing	3,083	0.00	0.00	4.33	0.26	4.07
Leather, Rubber, Footwear	2	0.00	0.00	30.00	0.00	30.00
Metals	69	0.00	0.00	0.00	0.00	0.00
Mineral Prod.,Prec. Stones&Metal	393	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	278	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	11,250	0.00	0.00	0.16	0.07	0.09
Fish and Fish Products	26	0.00	0.00	0.00	0.00	0.00
Wood, Pulp, Paper and Furniture	66	0.00	0.00	5.51	3.48	2.03
Textiles and Clothing	3,645	6.36	6.00	6.36	6.00	0.00
Leather, Rubber, Footwear	1	20.00	20.00	20.00	20.00	0.00
Metals	2,903	0.00	0.00	5.70	3.80	1.90
Chemical & Photographic Suppl.	444	0.00	0.00	0.00	0.00	0.00
Transport Equipment	20	0.00	0.00	0.00	0.00	0.00
Mineral Prod.,Prec. Stones&Metal	15,120	0.00	0.00	0.02	0.01	0.02
Manufactured Articles nes.	103	0.00	0.00	1.06	0.53	0.53

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Zaire's Exports to the EU, Japan and USA

Market and Product	Imports 1988 (\$ '000)	Tariff Rate(%)				
		Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	179,540	0.00	0.00	3.87	0.17	3.70
Fish and Fish Products	1,036	0.00	0.00	0.19	0.15	0.04
Wood, Pulp, Paper and Furniture	46,370	0.00	0.00	0.87	0.50	0.37
Textiles and Clothing	512	0.00	0.00	9.17	7.88	1.30
Leather, Rubber, Footwear	12,299	0.00	0.00	0.00	0.00	0.00
Metals	493,592	0.00	0.00	0.09	0.06	0.03
Chemical & Photographic Suppl.	9,371	0.00	0.00	8.44	1.90	6.53
Transport Equipment	419	0.00	0.00	7.12	6.63	0.49
Non - Electric Machinery	455	0.00	0.00	3.62	1.51	2.11
Electric Machinery	684	0.00	0.00	4.69	3.99	0.70
Mineral Prod.,Prec. Stones&Metal	329,432	0.00	0.00	0.01	0.00	0.00
Manufactured Articles nes.	3,168	0.00	0.00	2.61	1.51	1.10
<u>Japan</u>						
Agriculture excluding Fish	2,527	0.00	0.00	0.00	0.00	0.00
Wood, Pulp, Paper and Furniture	2,815	0.00	0.00	0.42	0.00	0.42
Metals	62,220	0.00	0.00	0.00	0.00	0.00
Mineral Prod.,Prec. Stones&Metal	4,337	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	105	0.00	0.00	1.62	1.52	0.09
<u>United States</u>						
Agriculture excluding Fish	2,774	0.00	0.00	0.00	0.00	0.00
Fish and Fish Products	216	0.00	0.00	0.00	0.00	0.00
Wood, Pulp, Paper and Furniture	734	0.00	0.00	0.47	0.29	0.18
Textiles and Clothing	16	8.81	5.38	10.83	7.13	0.27
Metals	96,804	0.00	0.00	0.86	0.86	0.00
Chemical & Photographic Suppl.	2,186	0.00	0.00	5.35	1.12	4.23
Transport Equipment	39	0.00	0.00	3.10	2.50	0.60
Mineral Prod.,Prec. Stones&Metal	78,170	0.01	0.01	0.11	0.03	0.07
Manufactured Articles nes.	1,825	0.00	0.00	0.00	0.00	0.00

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Zambia's Exports to the EU, Japan and USA

Market and Product	Imports 1988 (\$ '000)	Tariff Rate(%)				
		Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	9,042	0.43	0.29	14.72	10.85	3.73
Fish and Fish Products	237	0.00	0.00	3.50	2.24	1.26
Wood, Pulp, Paper and Furniture	54	0.00	0.00	1.39	0.00	1.39
Textiles and Clothing	7,097	0.00	0.00	10.31	8.27	2.04
Leather, Rubber, Footwear	1,536	0.00	0.00	0.61	0.42	0.19
Metals	304,661	0.00	0.00	0.04	0.03	0.01
Chemical & Photographic Suppl.	112	0.00	0.00	0.00	0.00	0.00
Transport Equipment	1,059	0.00	0.00	0.68	0.50	0.18
Non - Electric Machinery	408	0.00	0.00	4.47	0.72	3.75
Electric Machinery	389	0.00	0.00	2.53	2.03	0.50
Mineral Prod.,Prec. Stones&Metal	7,121	0.00	0.00	0.19	0.00	0.19
Manufactured Articles nes.	4,289	0.00	0.00	0.18	0.07	0.11
<u>Japan</u>						
Agriculture excluding Fish	436	0.00	0.00	0.09	0.00	0.09
Metals	390,343	0.00	0.00	0.02	0.01	0.00
Mineral Prod.,Prec. Stones&Metal	420	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	16	.	.	.	.	.
Wood, Pulp, Paper and Furniture	13	0.00	0.00	3.92	2.46	1.46
Textiles and Clothing	1	12.60	8.40	12.60	8.40	0.00
Leather, Rubber, Footwear	2	8.00	8.00	8.00	8.00	0.00
Metals	22,018	0.00	0.00	0.08	0.08	0.00
Non - Electric Machinery	86	0.00	0.00	0.96	0.60	0.36
Electric Machinery	2	0.00	0.00	3.00	0.80	2.20
Mineral Prod.,Prec. Stones&Metal	1,668	0.00	0.00	0.05	0.02	0.03
Manufactured Articles nes.	51	0.00	0.00	3.08	1.42	1.66

Source: Integrated Database (WTO) and Trade Analysis and Information System (UNCTAD)

Pre- and Post- Uruguay-Round Tariff Preferences for Zimbabwe's Exports to the EU, Japan and USA

Market and Product	Imports	Tariff Rate(%)				
	1988 (\$ '000)	Pre - UR Applied	Post - UR Applied	Pre - UR MFN	Post - UR MFN	Margin Reduction
<u>European Union</u>						
Agriculture excluding Fish	245,244	0.95	0.64	18.41	14.27	3.83
Fish and Fish Products	11	0.00	0.00	0.00	0.00	0.00
Wood, Pulp, Paper and Furniture	2,701	0.00	0.00	6.19	2.20	3.98
Textiles and Clothing	29,796	0.00	0.00	10.74	8.82	1.92
Leather, Rubber, Footwear	10,724	0.00	0.00	0.83	0.70	0.13
Metals	219,014	0.00	0.00	3.09	1.56	1.53
Chemical & Photographic Suppl.	1,467	0.00	0.00	7.51	6.20	1.31
Transport Equipment	120	0.00	0.00	5.84	3.71	2.13
Non - Electric Machinery	512	0.00	0.00	3.55	1.40	2.15
Electric Machinery	479	0.00	0.00	5.77	3.48	2.30
Mineral Prod.,Prec. Stones&Metal	83,872	0.00	0.00	0.01	0.00	0.01
Manufactured Articles nes.	62,608	0.00	0.00	0.08	0.04	0.04
<u>Japan</u>						
Agriculture excluding Fish	9,553	0.00	0.00	0.00	0.00	0.00
Leather, Rubber, Footwear	71	0.00	0.00	0.00	0.00	0.00
Metals	111,201	3.16	1.63	9.06	3.63	3.91
Electric Machinery	12	0.00	0.00	0.00	0.00	0.00
Mineral Prod.,Prec. Stones&Metal	30,984	0.00	0.00	0.00	0.00	0.00
Manufactured Articles nes.	3,647	0.00	0.00	0.00	0.00	0.00
<u>United States</u>						
Agriculture excluding Fish	14,441	0.00	0.00	8.45	5.47	2.99
Wood, Pulp, Paper and Furniture	302	0.00	0.00	2.23	0.15	2.08
Textiles and Clothing	4,341	16.30	15.15	16.30	15.15	0.00
Leather, Rubber, Footwear	2,048	0.28	0.20	2.63	1.77	0.78
Metals	91,737	1.75	1.75	1.75	1.75	0.00
Chemical & Photographic Suppl.	170	0.00	0.00	0.00	0.00	0.00
Non - Electric Machinery	239	0.00	0.00	1.59	1.21	0.38
Electric Machinery	1	0.00	0.00	4.20	2.50	1.70
Mineral Prod.,Prec. Stones&Metal	4,362	0.00	0.00	1.78	1.45	0.33
Manufactured Articles nes.	613	0.00	0.00	0.22	0.03	0.19

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