Chapter 8

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# Africa's bilateral food trade

By

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# 8. Africa's bilateral food trade

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This chapter on Africa's bilateral food trade (i.e. trade with non-African partner countries) turns the spotlight onto the changing pattern of trade with traditional partners and the growing relationship with emerging partners. It complements the discussion in Chapter 2 (on Africa's global trade flows and its decomposition into agricultural trade flows, food trade flows and agricultural inputs trade flows), in Chapter 5 (on formal and informal intra-African food trade) and in Chapter 9 (on the World Trade Organization (WTO) legal framework as it pertains to food trade and food security). In this chapter, bilateral food trade flows and the trade regimes underpinning them are brought into sharper focus. The chapter begins by examining the changing patterns in Africa's food and agricultural imports and exports before going on to discuss the trade policy aspects of these flows.

## 8.1 Traditional and emerging partners

The enduring story of Africa's bilateral food trade is the changing shares of the partners in both exports and imports since the turn of the century. While the value of exports and imports in current prices have increased (Figures 8.1 and 8.2), the proportion that is with countries of the Global South and that is from intra-African trade itself have grown significantly.

Among the traditional partners, the European Union (EU) remains the principal market for sourcing food imports and destination for food exports. But the EU's shares are declining. In 2017–2021, the European bloc received 27.7 per cent of Africa's food exports, compared to 33.2 per cent a decade earlier. On the import side, the decline was from 23.3 per cent to 21.5 per cent from 2007–2011 compared to 2017–2021. Even so, the EU remains the most important partner for Africa's food trade alongside the continent's trade with itself. The same trend in lower shares in the value of exports and imports is also evident in the case of the United Kingdom (UK). Imports from the

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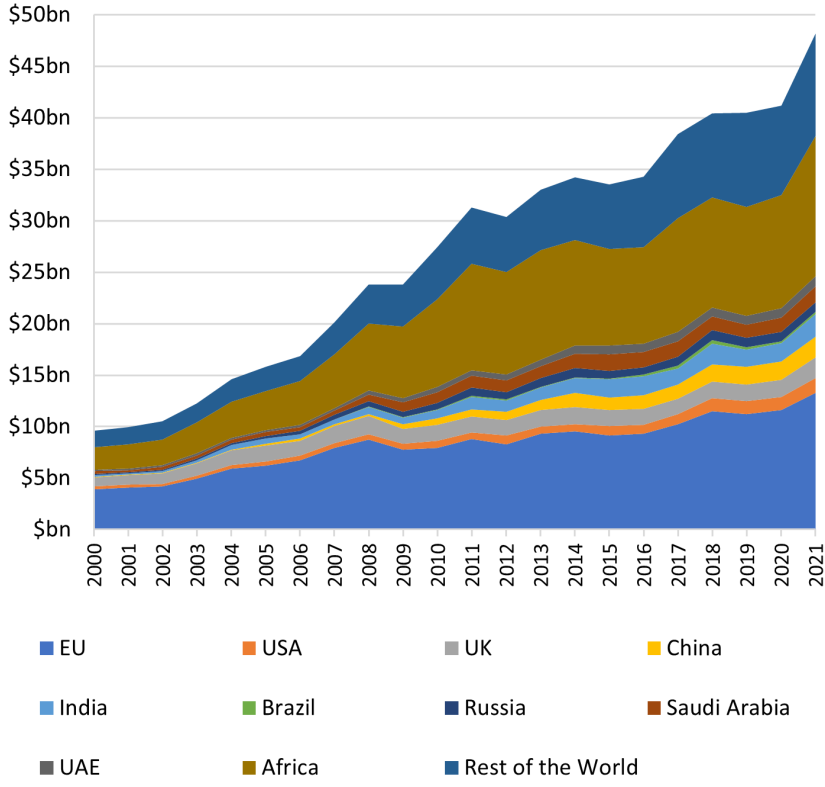
**Figure 8.1: Africa's exports by destination, basic food (US$ billion, current prices), 2000–2021**

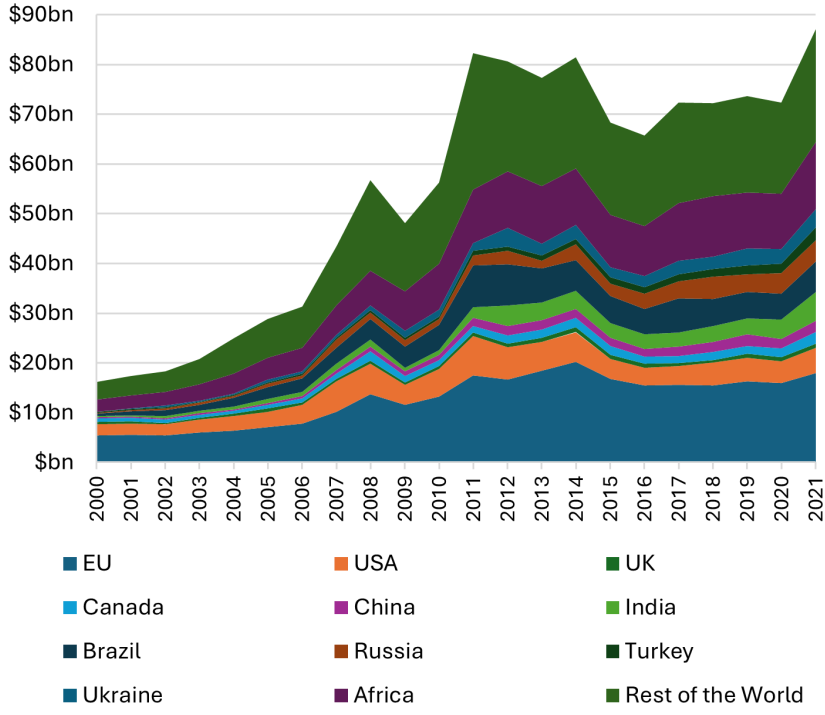



Source: Author's calculations based on UNCTAD (n.d.).

United States (US) have also declined but exports show an upward trajectory. As would be expected, Canada, Ukraine and Russia are important sources of cereal imports. Ukraine supplied 4 per cent of Africa's food imports in 2017–2021, up from 2.1 per cent a decade earlier, while Canada's share has remained constant at 2.4 per cent over the entire period.

Turning to emerging partners, both food exports and imports to and from China and India have increased. In particular, India's share of Africa's food imports has more than doubled – from 2.3 per cent to 4.9 per cent – in the past two decades. Saudi Arabia and the United Arab Emirates (UAE) are growing in significance as export markets. Brazil and to a lesser extent Turkey have emerged as a source of food imports. The rest of the world category, which mainly consists of other developing countries, has also grown in share of Africa's food exports but declined in share of imports. This residual group accounted for an average of 21.1 per cent of the value of Africa's

**Figure 8.2: Africa's imports by source country, basic food (US$ billion, current prices), 2000–2021**




Source: Author's calculations based on UNCTAD (n.d.).

food exports during 2017–2021, up from an average of 16.8 per cent a decade earlier.

Africa's increasing food exports to other developing countries signifies the growing trade ties within the Global South (Table 8.1). The trade relationships often encompass partnerships in agricultural cooperation. For instance, the Gulf states' investments in African farms, which have sometimes been viewed controversially as a 'land grab', bolster local agricultural know-how and production and help to secure local food supplies while also generating exports (Sambidge 2024). (Such land investments do raise important concerns, however, as discussed in Chapter 4.)

Finally, as noted in Chapter 5, intra-African trade in food is significant. Africa absorbed 27.3 per cent of its own food exports during 2017–2021, slightly down from 29.4 per cent a decade earlier. This share is much higher than for total merchandise exports (15 per cent), which suggests that intra-African exports are food-intensive, reflecting the region's comparative advantage and trade complementarity in agriculture.

**Table 8.1: Partners' shares of African exports and imports of basic food by value, period averages (%), 2007–2021**

| | Exports | | Imports | |
|---|---|---|---|---|
| **Partner** | **2007–2011** | **2017–2021** | **2007–2011** | **2017–2021** |
| EU | 33.2 | 27.7 | 23.3 | 21.5 |
| USA | 2.2 | 3.0 | 10.6 | 6.0 |
| UK | 6.5 | 4.0 | 1.0 | 0.9 |
| Canada | — | — | 2.4 | 2.4 |
| China | 1.6 | 4.1 | 1.8 | 2.8 |
| India | 2.9 | 4.4 | 2.3 | 4.9 |
| Brazil | 0.2 | 0.6 | 8.6 | 7.7 |
| Russia | 2.3 | 2.2 | 2.6 | 5.3 |
| Saudi Arabia | 3.2 | 3.4 | — | — |
| Turkey | — | — | 1.0 | 2.4 |
| Ukraine | — | — | 2.1 | 4.0 |
| UAE | 1.6 | 2.2 | — | — |
| Africa | 29.4 | 27.3 | 14.3 | 15.8 |
| Rest of the World | 16.8 | 21.1 | 30.1 | 26.3 |

Source: Author's calculations based on UNCTAD (n.d.).
Note: '—' means the share is negligible (less than 2 per cent). The shares are calculated on export/import values at current prices.

## 8.2 Net food trade

Overall, Africa's food import sources are more diversified than its export destinations. In Chapter 2, we noted that in 2021 African countries had an annual net trade deficit of $48 billion in basic foods and of $9 billion in agricultural capital or machinery, while returning a net surplus in exports of agricultural raw materials (including cocoa, tobacco, coffee, tea and spices) of $16 billion and agricultural inputs of $6 billion. We further noted that Africa's imports of basic foods have grown, reaching $104 billion in 2021, up from $97 billion in 2011. Africa's food exports outpaced that growth, increasing gradually but steadily from $41 billion in 2011 to $55 billion in 2021. This yielded the (reduced) net deficit in food trade in 2021, with 42 African states designated as 'net food-importing developing countries' (NFIDCs) by the WTO. How does the deficit breakdown on a bilateral basis?

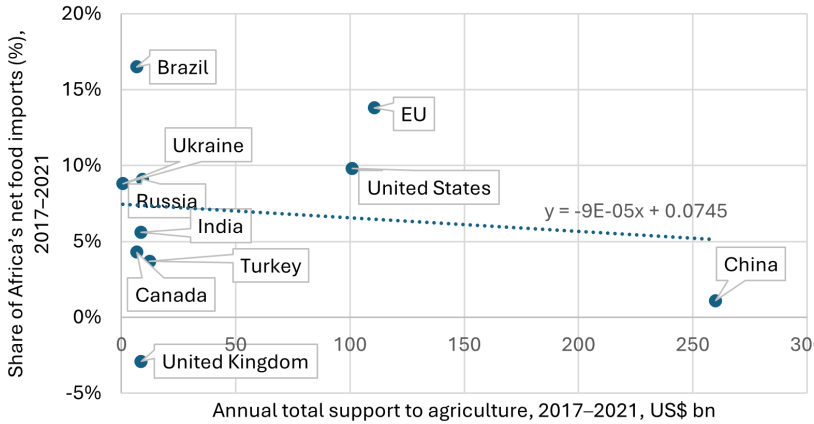
Table 8.2 ranks Africa's trade partners in descending order of importance as net food providers. The prominence of emerging food trade partners, which include the large rest of the world category alongside the traditional partners, stands out. As expected, all of Africa's major food trade partners are net food suppliers, except the UK.

**Table 8.2: Africa's topmost net food suppliers, 2017–2021**

| Partner | Share of Africa's net food imports (average for 2017–2021, %) |
|---|---|
| Brazil | 16.5 |
| EU | 13.8 |
| USA | 9.8 |
| Russia | 9.1 |
| Ukraine | 8.8 |
| India | 5.6 |
| Canada | 4.3 |
| Turkey | 3.7 |
| Africa | 1.7 |
| China | 1.1 |
| UAE | 0.9 |
| UK | −2.9 |
| Rest of the world | 27.7 |

Source: Author's calculations based on data from UNCTAD (n.d.).

**Figure 8.3: Share of Africa's net food imports (in percentage) vs. total support to agriculture (US$ billion, current prices), 2017–2021**




Source: Author's calculations based on OECD (n.d.) and UNCTAD (n.d.).

Although one might expect that countries that subsidise their agricultural sectors would be sources of net food imports for Africa (and the EU and the US, two of the largest subsidisers, are among the largest sources of net imports), there is actually a negative relationship between these countries' total support for agriculture and their net exports to Africa (see Figure 8.3).

## 8.3 What are the most traded foods?

Table 8.3 summarises the top 10 food products that Africa imports from, and exports to, the EU, the US, the UK, Russia, Brazil, China and India. The selection of countries and products is indicative rather than exhaustive and complements the discussion in Chapter 1. Cereals, dairy, poultry, fish and meat are strongly represented in food imports, with fruit, vegetables, nuts and fish among the leading food exports. Other agricultural exports such as coffee and cocoa are also shown in Table 8.3.

## 8.4 Trade in agricultural inputs

Inorganic fertilisers and agricultural machinery are not widely used among Africa's smallholder farmers. The former is a boon for sustainability (Baweja, Kumar and Kumar 2020) but the latter can have a negative impact on productivity. Using data from over 22,000 households across Ethiopia, Malawi, Niger, Nigeria, Tanzania, and Uganda, a study found that many as 84 per cent of the farmers surveyed did not use agro-chemical fertilisers and two-thirds of the farmers reported not using inorganic fertilisers. Tractor ownership among the households was minimal (Christiaensen and Demery 2018).

All the same, there is robust trade with traditional and emerging partners in agricultural inputs, including machinery, seeds, fertilisers and herbicides. The benefits are obvious. The availability of improved seeds enhances crop yields, contributing directly to increased food availability and stability. Mechanisation through the use of tractors and modern equipment enhances efficiency, allowing farmers to cultivate larger areas and minimise post-harvest losses. Access to fertilisers and herbicides improves soil fertility, pest management, and crop health, further boosting yields. Experimental analysis of African farms by Duflo, Kremer and Robinson (2008) found that the use of fertilisers and hybrid seed increased maize yields by 40 to 100 per cent. However, low and variable returns on investment in fertilisers continue to limit fertiliser uptake in Africa (Cairns et al. 2021).

Although inorganic fertilisers boost yields, they also cause long-term environmental harm, for example through reductions in plant diversity (CGIAR n.d.; Shi et al. 2024). Organic fertilisers could help to reduce this problem, as they can increase yields without losses of plant diversity (Shi et al. 2024). However, questions remain 'about their long-term impact on soil health and crop productivity' (CGIAR n.d.).

### Traditional partners

Besides being the leading food supplier to Africa, the EU is also a major provider of agricultural inputs, notably seeds, agricultural machinery and tractors (Table 8.4). During 2017–2021, Africa sourced over 70 per cent of its agri-

**Table 8.3: Africa's top imports and exports of food products (rankings based on average import/export values over 2017–2021)**

| *Imports from:* | | | | | | |
|---|---|---|---|---|---|---|
| **Brazil** | **EU** | **USA** | **UK** | **Russia** | **India** | **China** |
| Sugar | Wheat | Wheat | Milk and cream | Wheat | Rice | Tea |
| Maize | Food preparations | Poultry | Food preparations | Barley | Other beet or cane sugar | Rice |
| Poultry | Milk and cream | Maize, unmilled | Poultry | Fish, frozen | Meat of bovine animals, frozen | Fish, prepared or preserved |
| Meat of bovine animals, frozen | Poultry | Edible nuts | Vegetables, prepared or preserved | Poultry | Spices | Fish, frozen |
| Rice | Fish, frozen | Oil cake and other solid residues | | Yeasts | Bread, pastry, cakes etc. | Vegetables, prepared or preserved |
| Sausages | Malt | Milk and cream | | Leguminous vegetables | Sugar confectionery | Food preparations |
| Pig meat | Cheese, curd | Leguminous vegetables | | Other maize, unmilled | Extracts, essences and concentrates of coffee | Sausages and preparations thereof |
| | Bread, pastry, cakes etc. | Edible animal offal | | Meat of bovine animals, frozen | Sugars, of beet or cane | Other fresh or chilled vegetables |
| | Bovine animals, live | Grain sorghum, unmilled | | Oil cake and other solid residues | Coffee, not roasted | Yeasts |
| | | | | Other sugars | Food preparations | Sugar confectionery |

*(Continued)*

**Table 8.3: (Continued)**

| Exports to: | | | | | | |
|---|---|---|---|---|---|---|
| **Brazil** | **EU** | **US** | **UK** | **Russia** | **India** | **China** |
| Cocoa beans | Cocoa beans | Cocoa beans | Fruit, fresh or dried | Oranges and other citrus fruit | Edible nuts | Oranges and other citrus fruit |
| Fish, frozen | Fruit, fresh or dried | Cocoa paste | Fresh or chilled vegetables | Cocoa beans | Leguminous vegetables | Edible nuts |
| Vegetables, prepared or preserved | Coffee | Coffee | Grapes | Fruit, fresh or dried | Spices | Residues of starch |
| Cocoa paste | Fish, prepared or preserved | Spices | Oranges | Cocoa paste | Oranges and other citrus fruit | Coffee, not roasted |
| Cocoa powder | Oranges and other citrus fruit | Edible nuts | Fish, prepared or preserved | Potatoes, fresh or chilled | Coffee, not roasted | Fruit and nuts |
| Spices | Cocoa paste | Oranges and other citrus fruit | Cocoa beans | Tea | Oil cake and other solid residues | Meat of bovine animals, frozen |
| Fruit, fresh or dried | Other vegetables | Fish, prepared or preserved | Tea | Other citrus fruit, fresh or dried | Cocoa beans | Leguminous vegetables |
| Oranges and other citrus fruit | Cocoa butter | Vegetables, prepared or preserved | Tomatoes | Grapes, fresh or dried | Fruit, fresh or dried | Cocoa beans |
| Fruit and nuts | Tomatoes | Fruit, fresh or dried | Apples | Coffee, not roasted | Tea | |
| | Grapes | Sugar | Cocoa butter | Other fresh or chilled vegetables | | |

Source: Author's calculations based on UNCTAD (n.d.).

**Table 8.4: Top five non-African exporters of agricultural inputs and machinery to Africa, average values for 2017–2021 (US$ million)**

| Country | Agricultural machinery and parts (Standard International Trade Classification (SITC) 721) | Country | Fertilisers (SITC 562) | Country | Seeds, fruits and spores for planting (SITC 2925) | Country | Herbicides (SITC 5913) | Country | Tractors (SITC 7125) |
|---|---|---|---|---|---|---|---|---|---|
| EU | 527.6 | EU | 429.6 | EU | 306.3 | China | 691.0 | EU | 191.8 |
| China | 141.0 | Russia | 304.0 | USA | 35.1 | EU | 170.4 | USA | 137.0 |
| USA | 102.0 | Saudi Arabia | 242.0 | Israel | 12.0 | India | 62.9 | India | 133.0 |
| India | 62.1 | China | 219.0 | Australia | 9.8 | USA | 31.9 | China | 70.8 |
| Turkey | 56.0 | Jordan | 122.0 | India | 6.8 | Israel | 8.4 | UK | 45.9 |
| Rest of the world | 216.2 | Rest of the world | 1762.0.0 | Rest of the world | 66.2 | Rest of the world | 92.8 | Rest of the world | 154.3 |
| **Total imports** | 1104.9 | **Total imports** | 3042.5 | **Total imports** | 436.4 | **Total imports** | 1011.3 | **Total imports** | 732.8 |

Source: Author's calculations based on data from UN Comtrade.
Note: Numbers for total imports may not match the totals for those from individual partners because the partner jurisdiction is not identified for some imports, and because of rounding off.

cultural seeds from the EU, underpinned by collaborative arrangements such as the Alliance for a Green Revolution in Africa (AGRA) and the Seed and Knowledge Initiative (AGRA 2021). Other initiatives, such as the EU–Africa Partnership on Food and Nutrition Security and Sustainable Agriculture, also support African farmers' access to inputs, among other objectives (Partnership on Food and Nutrition Security and Sustainable Agriculture (FNSSA) n.d.). In 2017–2021, about half of Africa's imports of agricultural machinery and a third of its tractor imports came from the EU.

Among other traditional partners, the US is a notable supplier of tractors and agricultural machinery to Africa, accounting for about one-fifth of Africa's tractor imports in 2017–2021 according to UN Comtrade data. The US Feed the Future programme seeks to improve agricultural production and markets in developing countries (USAID n.d.).

The UK is a significant supplier of tractors and an important exporter of agricultural machinery and parts to Africa. The UK's involvement in African agriculture can be traced back to the colonial era, when British companies established agricultural plantations and introduced modern farming techniques. This influence has a left a lasting legacy, as British agricultural expertise and machinery continue to be used in many parts of the continent.

### Emerging partners

China has emerged as the largest supplier of herbicides to the continent and is next to the EU in agricultural machinery exports to Africa. Indian tractors are becoming popular on African farms, not only because of price and durability but also because of their adaptability to local agricultural conditions. Saudi Arabia (fertilisers), Israel (seeds) and Turkey (tractors) are important input suppliers to Africa.

Much like the traditional partners, Africa's emerging partners have set up initiatives to promote access to agricultural inputs and technology, knowledge-sharing and capacity-building (*Business Times* 2018). Notable among these are the India's Technical and Economic Cooperation Programme, the China–Africa Agriculture Cooperation Programme, and collaboration between the Brazilian Agricultural Research Corporation (Embrapa) and some African countries (Santos 2016).

## 8.5 What are the trade policy regimes underpinning Africa's bilateral food trade?

This section considers the trade policies and related issues that impact bilateral food trade with selected traditional and emerging trading partners. Among traditional partners, the EU and US have long established trade policy regimes that impact Africa's food trade. Russia and Ukraine also have a long

## Box 8.1: The Black Sea Grain Initiative (BSGI)

The BSGI was negotiated in July 2022 between Turkey, Russia, Ukraine and the UN as a means of ensuring that Ukraine could ship its grain via the Bosphorus. The deal ended one year later, in July 2023, as Russia retaliated against Western sanctions and attacks by Ukraine on its Black Sea fleet.

Under the initiative, Ukraine exported over 33 million tonnes of grain between July 2022 and July 2023. Partly as a result of this, the price of grain stabilised at $800 per tonne, down from a high of $1,360. With the collapse of the initiative, Russia announced it would donate 'free grain' to six countries with which it has strong links: Somalia, Burkina Faso, Eritrea, Zimbabwe, Central African Republic and Mali. This prompted UN warnings that a 'handful of donations' would not correct the 'dramatic impact' caused by the end of the Black Sea deal. The suspension of the BSGI again generated fluctuations in international wheat prices. Djibouti, Somalia and Sudan – highly dependent on imports through the Black Sea – were particularly vulnerable. Somalia's reliance on Ukraine for over 60 per cent of its wheat imports underscores this vulnerability and resulted in an urgent search for alternative sources for wheat supply, including through humanitarian aid. In Sudan, a decline in wheat production in 2023 amid political instability exacerbated the effects of the collapse of the BSGI. A dramatic rise in local wheat flour prices followed, reducing access and affordability. The uncertainties following the Russia–Ukraine conflict led most African countries that depended on grain supplies from the warring parties to diversify their sources of imports.

Source: WFP (World Food Programme) (2023); Wintour (2023).

history of trade with African countries, supplying cereals. Consequently, the Russia–Ukraine war, including the rise and demise of the Black Sea Grain Initiative (see Box 8.1), exposed vulnerabilities for some African countries. Among emerging trading partners, China, India and Brazil illustrate the growing trade partnerships with the Global South.

### Traditional partners – the EU

The EU's bilateral trade arrangements with African countries vary according to geographical location on the African continent and level of development (Luke, McCartan-Demie and Guepie. 2023). Specifically, as regards food trade, agricultural protectionism, food safety standards, intellectual property rights, and initiatives emanating from the EU's Green Deal are problematic areas in the bilateral food trade relationship.

EU agricultural protectionism is exercised through its agriculture tariff schedules, domestic support or subsidies for its farmers and recourse to 'special agricultural safeguards', all of which are permitted under WTO rules. Since the start of the Doha Round in 2001, export subsidies have been virtually eliminated and import tariffs on agricultural products have been significantly reduced. However, the share of domestic subsidies in total support to farmers in OECD countries has more than doubled in the two decades since then (Anderson et al. 2021, p.1). As discussed in Chapter 9, rich countries' agricultural subsidies incentivise production, which contributes to global food availability but disincentivises production in poorer and net food-importing countries. This presents a major challenge to African agricultural production, trade and food security, as do the persistent imbalances in the WTOs Agreement on Agriculture (Eagleton-Pierce 2012; ECA Southern Africa Office (SRO-SA) 2007; Singh 2017, cited in Hopewell 2022).

In relation to tariff schedules, in the dairy sector, average tariffs are as high as 32 per cent, with sugar and confectionery at 27 per cent, meat at 19 per cent, cereals and cereal preparations at 17 per cent, and fruits and vegetables at 13 per cent (WTO 2019). EU agricultural tariff-rate quotas (TRQs)[1] are quite diverse and apply to a wide range of agricultural goods such as meat, dairy, cereals, fruit and vegetables, and processed foods, some of which are of major export interest to Africa. However, the utilisation rate of these TRQs has remained low and constant, averaging 39 per cent in recent years (WTO 2023). The evidence suggests that TRQs can facilitate market access for African horticultural exports to the EU, such as South Africa's exports of canned fruit, but they pose challenges due to their limited nature and potential for market distortions (Muchopa 2021).

As for domestic support, annual spending on EU farm subsidies is a multiple of the gross domestic product of many African countries. In 2019–2020 this was €81 billion and applied to farmers' income support, rural development and market measures (Directorate-General for Agriculture and Rural Development n.d. a; Directorate-General for Agriculture and Rural Development n.d. b). Farm subsidies incentivise overproduction and contribute to higher greenhouse gas (GHG) emissions in sectors such as meat production.

Special agricultural safeguards[2] are applied to three groups of products: sugar, fruits and vegetables, and poultry and meat, which are already aided by subsidies and tariff protection, including specific seasonal tariffs (WTO 2019). This is why Everything but Arms, the EU's concessional trade arrangement for least-developed countries (LDCs), is often mocked as Everything but Farms! The combined effect of these policies is that the EU, which might well be a net importer of some of these products, is actually a net exporter. An example is Morocco's food trade with the EU. Morocco is more competitive than EU producers in certain fruits and vegetables such as tomatoes, oranges and clementines. However, EU subsidies distort farm prices, making it difficult for Morocco and other North African producers to compete in the EU market (van Berkum 2013).

The EU's food safety standards are modelled on the WTO Sanitary and Phytosanitary Measures (SPS) Agreement and encompass various aspects of the food value chain, including hygiene, labelling, pesticide residues, contaminants and traceability. Based on its Farm to Fork Strategy, the EU's SPS regime is recognised as going beyond the protection of consumer health. The strategy has a wide compass that includes animal welfare, sustainable agricultural practices, environmental protection and nature conservation (Directorate-General for Health and Food Safety 2024). An empirical study by UNCTAD found that the EU's SPS measures resulted in higher burdens for lower-income countries and a 14 per cent reduction in their agricultural exports (Murina and Nicita 2014). In 2022, South Africa filed a complaint under the WTO's dispute settlement arrangements against the EU on what it considered to be unwarranted phytosanitary requirements for its fruit exports (van der Ven and Luke 2023).

Intellectual property rights as they relate to plant genetic resources and technology transfer is another area of concern in Africa's bilateral food trade relationship with the EU. As previously noted, the EU is a source of key agricultural inputs, including seeds. EU intellectual property rights requirements restrict farmers' ability to save and exchange seeds. In addition, 'non-complying seeds, including traditional heterogeneous varieties, are banned' (de Mévius 2022). Notwithstanding certain derogations (such as the right of farmers to reuse and multiply patent-protected seeds for use on their own farms), the legal space for the conservation and sustainable use of plant genetic resources for food agriculture is narrow (de Mévius 2022; Gil-Robles and Edlinger, 1998). Although this legislation applies only to EU member states, in some cases it has inspired other countries to adopt similar legislation;[3] Egypt, Morocco and Tunisia have done this as part of signing the Euro-Med Association Agreements with the EU (Peschard, Golay and Araya 2023, p.45). Moreover, the EU Seed Marketing Legislation that is being developed prohibits public gene banks, private collections, and unauthorised use of EU-originating seeds (de Mévius 2022).[4]

During the early years of the 2020s, the EU elaborated a range of policy initiatives under its Green Deal and Fit for 55 climate package, aimed at reducing carbon emissions by 55 per cent by 2030 and achieving carbon neutrality by 2050. Among these are the Carbon Border Adjustment Mechanism (CBAM) and the Deforestation Regulation. Of these two policy measures, the proposal for a CBAM only marginally affects agriculture and food trade, although further measures on agricultural products have not been ruled out in the future. In the first phase of the scheme, which came into effect in October 2023, the CBAM introduced a levy on emissions embedded in imported goods such as cement, aluminium, iron and steel, fertilisers, electricity and hydrogen to address the issue of 'carbon leakage'. This occurs where EU-based producers are subjected to its emissions trading scheme while imports may not face the same level of levies on emissions. Of the products included in the scheme that are directly relevant to agriculture,

only the small trade in fertilisers exported to the EU from countries such as Mauritania and Morocco is initially affected.

However, the EU Deforestation Regulation, which aims to address the environmental impacts of deforestation and forest degradation associated with EU imports and production of specific agricultural commodities (Regulation on Deforestation-Free Products n.d.), will have a direct impact on bilateral food and agricultural trade. The regulation – which was initially scheduled to come into effect on 30 December 2024 but delayed for a year to 30 December 2025 – targets products with high deforestation risk such as cocoa, coffee, palm oil, soya, beef, wood and rubber. The scope could be extended to include pig meat, sheep, goats, poultry, maize, charcoal and printed paper products. Importers of the covered goods into the EU must ensure that these products do not come from land that was deforested after 31 December 2021, produced in accordance with both the laws of the country of origin and international law, and respect the rights of traditional communities over their territories. To facilitate compliance, the EU has created a benchmarking system categorising countries into low, standard or high risk of deforestation. Low-risk countries will have simplified due diligence obligations, reducing compliance costs for EU importers. High-risk commodity-exporting countries will face more rigorous scrutiny. Establishing risk and the traceability of products including through the satellite and GPS technologies that are essential to the scheme will impose additional costs on African food and agricultural exporters.

However, these climate-focused interventions may also have benefits for Africa by impacting the pace of climate change, given how far the continent is expected to suffer (and is already suffering) as a result of the climate crisis (World Meteorological Organization 2020; World Meteorological Organization 2023).

## Traditional partners – the US

The Africa Growth and Opportunity Act (AGOA), which has been in effect since 2001, providing eligible African countries south of the Sahara with duty-free access to the US market for over 6,700 products, is the main trade policy framework for bilateral trade with the US. Good governance is a major criterion for eligibility. At the time of writing, six African countries (Burkina Faso, Guinea, Mali, Niger, Sudan and Ethiopia) have been suspended from the scheme for not being compliant with the governance criterion. The risk of suspension of AGOA benefits generates uncertainty for investors and exporters. For non-AGOA eligible African countries, trade with the US is carried out under most-favoured nation tariffs or the US Generalised System of Preferences (GSP). Since 2006, Morocco has had a free trade area arrangement with the US. In relation to food, wheat is a major import to Morocco from the US, with fruit, nuts and horticulture produce going in the other direction (Office of the United States Trade Representative n.d.).

AGOA has been reauthorised by the US Congress five times: in 2004, 2006, 2007, 2012 and 2015. While the earlier extensions were short-term, the 2015 extension was for 10 years, allowing greater predictability in trade and investment decisions. At the time of writing, discussions have begun for a further extension in 2025. Its extension is shrouded in uncertainty given the second Trump administration's aggressive transactional approach to trade policy.

As we saw earlier in this chapter in the discussion of bilateral trade flows, AGOA has facilitated a modest growth in Africa's food and agricultural exports. Africa's agricultural exports to the US have increased by 60.8 per cent in the past 10 years to reach US$2.9 billion in 2022. However, agricultural products account for just 11 per cent of non-oil imports under AGOA (Schneidman, McNulty and Dicharry 2021). Other challenges to food and agricultural exports under AGOA include product exclusion and erosion of preferences as market access concessions are granted by the US to an increasing range of countries, Viet Nam for example. Capacity to comply with non-tariff barriers, particularly SPS regulations, has also hindered AGOA agricultural exports. For example, lengthy US import approval procedures for horticultural products meant that baby squash and courgettes from Zambia, which were considered for export following the enactment of AGOA in 2001, received the green light more than seven years later in December 2008 (Pasco 2010).

As in the EU, agricultural protectionism is exercised through high import tariffs for farm products and subsidies for farmers. This makes some African exports less competitive in the US market. High tariffs and TRQs permeate several agricultural sectors that also attract substantial farm subsidies, including sugar, tobacco, cotton, dairy and beef. The US maintains 46 TRQs on seven commodities (Meltzer 2015).

Peanuts, for example, attract over-quota tariffs of up to 163.8 per cent. This is a prohibitive tariff that shuts out any prospect of African peanut exports to the US beyond the quota amount, since imports beyond the quota do not benefit from duty-free access under AGOA. Tobacco faces an ad valorem tariff[5] equivalent of 350 per cent, which is a high barrier to overcome for Malawi's tobacco to enter the lucrative US market. Dairy products attract the highest number of TRQs (22) across 107 in-quota tariff lines, with ad valorem equivalents ranging from 30 to 120 per cent. Sugar, a major African export to the US as noted from Table 8.3, is hit with over-quota tariffs of up to 210 per cent. One study estimates that the complete elimination of US tariffs on agricultural exports under AGOA would increase African exports by more than $105 million while reducing US production by less than US$10 million (Mevel, Lewis and Kamau 2013).

In 2019–2020, the United States provided €190.6 billion in farm subsidies (Directorate-General for Agriculture and Rural Development n.d. b). These covered more than 150 programmes including ad hoc disaster assistance, agricultural risk, crop insurance, conservation, price loss below the products' reference price, marketing and export aid, and research and development (Edwards 2023). Here again, these subsidies are allowed under WTO rules, as

discussed in Chapter 9. The scale of the subsidies encourages overproduction and generates higher carbon emissions in some sectors. The subsidies also have the effect of out-competing African food exports in sectors where they are competitive, notably beef, maize, soya beans and dairy. A convenient outlet for overproduction is food aid. Quite apart from humanitarian and emergency relief, food aid as discussed in Chapter 4 and Chapter 9 can undermine local production and generate dependencies.

## Traditional partners – Russia and Ukraine

Both Russia and Ukraine are major players in global agricultural production and trade in cereals. Ukraine is also a major producer of sunflower oil. Russia is Africa's third biggest supplier of fertilisers. Cereals represented 35 per cent of Africa's imports from Russia during 2017–2021. According to UNCTADSTAT data, Ukraine's share of Africa's food imports doubled to 4 per cent in the past decade. Cereals from Ukraine represent 10 per cent of Africa's world cereal imports. Africa's exports to Ukraine are negligible but about half of Africa's exports to Russia during 2017–2021 were in food products, notably agricultural commodities, fruit and horticulture.

Africa maintains a deficit in net food trade with both Russia and Ukraine. However, trade with Russia and Ukraine is concentrated in a handful of African countries, namely Egypt, Kenya, Sudan, Tunisia, Ethiopia, Somalia and Djibouti. This explains the limited effect on Africa as a whole of the supply disruption that followed Russia's invasion of Ukraine in 2022. Although food imports from Russia and Ukraine are small in relation to Africa's total food imports, their concentration in a few countries resulted in apprehensions about the availability of supplies, resulting in the negotiation of the Black Sea Grain Initiative (see Box 8.1).

Unlike the EU and the US, Russia and Ukraine do not have well-defined trade policy frameworks with African countries. As a member of the Eurasian Customs Union (with Belarus, Kazakhstan, Kyrgyzstan and Amenia), Russia offers preferential market access to developing countries through a GSP scheme and participates in the WTO's duty-free quota-free (DFQF) market access for least-developed countries.

Russia also engages in technical assistance and knowledge-sharing activities, including technology transfer, research collaboration and agribusiness development. A forum on agribusiness was held during the 2019 Russia–Africa summit (Yakovenko 2019).

## Emerging partners – China

As previously noted, China–Africa trade in agricultural goods is modest but growing. During 2017–2021, China accounted for 4.1 per cent of Africa's food exports and 2.8 pr cent of imports. In comparison with trade in all

goods, China accounted for 15.2 per cent of Africa's exports and 17.3 per cent of imports, making agricultural trade a small part of total trade. Fruits, nuts, vegetables and beef are among the food exports to China, along with coffee, tobacco and cotton among other agricultural products. Imports include rice, food preparations, yeasts, sugar, agricultural inputs and machinery. Chinese investment has been made in trade-related infrastructure, such as transportation and storage facilities (Hamilton and Maliphol 2021). Technical assistance, technology transfer, knowledge-sharing and capacity-building initiatives are directed to African farmers and agribusinesses (Ministry of Foreign Affairs of the People's Republic of China 2024).

In relation to trade policy, only the 'most basic' framework exists for trade between China and African countries (Luke, McCartan-Demie and Guepie 2023). As it considers itself a developing country (and is still an upper-middle-income country according to the World Bank's classification, rather than a high-income one), China does not offer a GSP (World Bank n.d.). However, since 2010 it has participated in the WTO's duty-free quota-free scheme for LDCs for up to 98 per cent of tariff lines. In 2021, China concluded a free trade agreement (FTA) with Mauritius, the only trade deal it has with an African country. The make-up of the Mauritian economy and its highly liberalised trade regime, and the challenges for Mauritian firms to increase their exports to China in spite of the FTA, are such that the agreement will have little impact on food and agricultural trade (Ancharaz and Nathoo 2022).

Like other large economies, China protects its agricultural sector through the use of such tools as tariffs, subsidies and food safety measures. Concerns that the latter have been a major impediment to Africa's exports of agricultural products have prompted African countries to negotiate 'green lanes' with China to ease the process of carrying out phytosanitary assessments in exporting agricultural produce to China.

## Emerging partners – India

India–Africa trade has a long history, facilitated by the shared geography of the Indian Ocean rim. Engagement on trade is also driven by the presence of a large Indian diaspora on the continent (Ben Barka 2011; Chakrabarty 2016).

In line with growing trade ties between Africa and countries in the Global South, food trade with India has grown during the last two decades. India accounted for 4.4 per cent of Africa's food exports and 4.9 per cent of food imports during 2017–2021. The composition of exports to India are comparable with those to China and consist of nuts, fruits, spices, vegetables and agricultural commodities like coffee and cocoa. Imports from India include rice, sugar, meat and food preparations.

Agriculture is a strategic sector in India and protected by policy measures allowed by the WTO. As a developing country, India like China does not have a GSP scheme but participates in the WTO DFQF initiative for LDCs. This allows duty-free treatment for up to 98 per cent of tariff lines as of 2014 (Ancharaz and

Ghisu 2014). But some agricultural commodities in which African countries are competitive, such as coffee and tea, are excluded from the scheme (Ancharaz and Ghisu 2014; Ancharaz, Ghisu and Wan 2014, p.25). Research in Ethiopia, Tanzania and Uganda has found that uptake of the scheme was marred by lack of awareness of the scheme among exporters of the opportunities it offered (Ancharaz, Ghisu and Frank 2014a, p.11; Ancharaz, Ghisu and Frank 2014b, p.26; Ancharaz, Ghisu and Wan 2014, p.25).

### Emerging partners – Brazil

Brazil's emergence as an agricultural superpower is evidenced by its leading role as a global supplier of soya, meat, grains and sugar. In Africa, Brazil is the biggest supplier of sugar, maize and poultry, and among the top exporters of other animal products. During 2017–2021, Brazil accounted for 7.7 per cent of Africa's food imports, making it more important than all other trading partners except the EU (as a bloc) and the African continent itself (as a whole). Food represents two-thirds of all imports from Brazil, while Africa's food exports are negligible.

As a developing country, Brazil does not offer trade preferences to African countries. In 2016, Mercosur, of which Brazil is a member, and the Southern Africa Customs Union (SACU), which includes South Africa, Botswana, Namibia, Eswatini and Lesotho, concluded an FTA. It is a shallow agreement that sets out preference margins of 10, 25, 50 and 100 per cent on 1,050 tariff lines covering both industrial and agricultural goods (Ministério das Relações Exteriores [Ministry of Foreign Affairs], 2016).

Brazil shares its agricultural know-how through robust technical assistance outreach. Similar agronomic conditions and affinities between Africa and Brazil have often been invoked to support the transfer of knowledge and technology between the two partners. This includes initiatives such as the Brazil–Africa Agriculture and Food Security Programme, which seeks to foster self-reliance in African agriculture by promoting sustainable practices and agribusiness development (World Food Programme 2020), and More Food International (MFI), a cooperation programme aimed at strengthening the productive capacity of African smallholder farmers. However, a case study of the adoption of MFI in three Africa countries – Ghana, Mozambique and Zimbabwe – suggests that the programme has not worked well as local conditions were not taken fully into account (Cabral et al. 2016).

## Summary

This chapter has reviewed the food trade relationships between Africa and its traditional bilateral partners such as the EU, the US, Russia and Ukraine and emerging bilateral partners such as Brazil, China and India. The chapter has uncovered various aspects of how these interactions impact food trade

and food security on the African continent in terms of both the value of net imports and the specific products that are provided. The geography of these relationships is changing, with increasing food trade flows between African and emerging partners in the Global South. Traditional partners are also losing trade shares in agricultural inputs such as machinery, seeds, fertilisers and herbicides to emerging partners.

Brazil is the largest net food supplier to Africa, followed by the EU and the US. The EU, however, remains Africa's most important market for both food exports and imports. The EU and the US are also significant suppliers of agricultural seeds, machinery and tractors to Africa. Among traditional partners, Russia and Ukraine are a major source of cereal exports to Africa. The Russia–Ukraine war that started in 2022 disrupted the flow of these exports. But the concentration of Russia's and Ukraine's grain exports in a few African countries limited a wider damaging effect, although the collapse of the BSGI after only one year in 2023 resulted in a surge in wheat prices.

In assessing the trade policy regimes that underpin trade flows, we saw that many African countries benefit from market access concessions such as the EU's Everything but Arms, the US's AGOA and the WTO's DFQF initiative. But there is a high level of agriculture sector protectionism in bilateral partners' markets through measures allowed by WTO rules. These include high import tariffs for farm products and subsidies to farmers, which lead both to overproduction and to enhanced levels of GHG emissions in some food production sectors. Agricultural protectionism makes many African food exports less competitive, especially in traditional partners' markets. Capacity in several African countries to meet food safety standards is a perennial challenge. In the case of China, significant efforts have been made to work with African exporters to ease this difficulty through the introduction of 'green lanes'. Policies in the EU related to its Green Deal and Fit for 55 such as the CBAM and Deforestation Regulation will increasingly expose the nexus between trade and climate to greater scrutiny.

Forty-two of the 54 African countries are net food importers, which elevates bilateral food trade to a matter of strategic importance for these countries. Most of these countries are part of the NFIDC group at the WTO. These countries coordinate efforts to keep international food markets open, monitor food aid flows and constitute an important stakeholder group in negotiations to reform WTO rules on agriculture.

## Notes

[1] In the EU, 'tariff-rate quotas' refers to quotas for imports than can benefit from a lower tariff than any imports that exceed the quota (European Commission 2024).

[2] 'Special agricultural safeguards' refers to temporary restrictions on imports used to deal with special circumstances such as a sudden surge in imports (World Trade Organization 2004).

[3] As of 2022, Egypt, Ghana, Kenya, Morocco, Tanzania and Tunisia were party to the 1991 UPOV Convention. Farmers in a state party to this convention 'cannot save or reuse seeds of protected varieties, except on their own farms, and only provided that their government has adopted an optional exception to this effect (Articles 15). Moreover, this exception must be "within reasonable limits" and safeguard "the legitimate interests of the breeder." This means, for example, that it can be limited to certain crops or can be conditional on the payment of license fees' (Peschard, Golay and Araya 2023, p.21, based on UPOV International Union for the Protection of New Varieties of Plants 2009, pp.8–11).

[4] See also ARC (2023).

[5] An ad valorem tariff is one where the tariff to be paid is determined as a percentage of the value of the goods being imported.

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