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IMPLICATIONS OF ETHIOPIA'S INTERNATIONAL TRADE NEGOTIATIONS AND THE PRIVATE SECTOR– AN OVERARCHING VIEW

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Implications of Ethiopia's international trade negotiations and the private sector – an overarching view[1]

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ABSTRACT

Ethiopia is currently involved in a number of international trade negotiations which will have a far-reaching impact on the Ethiopian economy. Negotiations take place both at the multilateral level (Ethiopia's accession to the World Trade Organisation) and inter-regionally (Economic Partnership Agreement with the European Union). Regionally, studies are under way on the establishment of economic integration among members of the Inter-Governmental Authority for Development and the Sana'a Forum for Co-operation. Finally, a decision will have to be taken regarding Ethiopia's potential joining the Common Market of Eastern and Southern Africa's (COMESA) Free Trade Area – which might be superseded by a Tripartite FTA combining the 26 members of COMESA, the Southern African Development Community (SADC) and the East African Community (EAC). Against this background, the paper pursues a number of objectives. First, it assesses the likely implications for the Ethiopian economy of the ongoing and planned international trade negotiations in which Ethiopia is involved. Second, the paper aims at helping develop a coherent strategy for all of Ethiopia's current and international trade negotiations. Third, it raises awareness among the Ethiopian business community about the various international trade negotiations in which Ethiopia is involved and thus contributes to devising a positive and proactive agenda by forging consensus and commitment among private sector representatives and building a strategic partnership between public and private sector leaders in order to leverage regional and multilateral negotiations.

Keywords:
EPA, African regional integration, trade policy formulation, public-private dialogue, trade negotiations, Ethiopia.

JEL Codes: F14, F15, F16, F50

[1] An earlier version of this paper was presented at the Fifth Annual PSD Conference "Strengthening the Role of the Private Sector in International Trade Negotiations", Addis Ababa, 22 June 2010.

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ABBREVIATIONS

ACP	African, Caribbean, Pacific
ADLI	Agricultural Development Led Industrialisation
AGOA	African Growth and Opportunities Act
COMESA	Common Market of Eastern and Southern Africa
EAC	East African Community
EBA	Everything But Arms
EPA	Economic Partnership Agreement
ESA	Eastern and Southern Africa
EU	European Union
FTA	Free Trade Agreement
GDP	Gross Domestic Product
GSIM	Global Simulation Model
GTP	Growth and Transformation Plan
HS	Harmonised System
IDS	Industrial Development Strategy
IEPA	Interim Economic Partnership Agreement
IGAD	Inter-Governmental Authority for Development
LDC	Least Developed Country
MFN	Most-Favoured Nation
MFTR	Memorandum on the Foreign Trade Regime
NTB	Non-Tariff Barrier
PASDEP	Plan for Accelerated and Sustained Development to End Poverty
PTA	Preferential Trade Agreement
SADC	Southern African Development Community
SFC	Sana'a Forum for Cooperation
SPS	Sanitary and Phyto-Sanitary
TFTA	Tripartite Free Trade Agreement
USD	United States Dollar
WTO	World Trade Organisation

1 INTRODUCTION

Ethiopia is currently involved in a number of international trade negotiations which will have a far-reaching impact on the Ethiopian economy. Negotiations take place both at the multilateral level (Ethiopia's accession to the World Trade Organisation, WTO) and inter-regionally (Economic Partnership Agreement, EPA, with the European Union). Regionally, studies are under way on the establishment of economic integration among members of the Inter-Governmental Authority for Development (IGAD) and the Sana'a Forum for Co-operation (SFC). Finally, a decision will have to be taken regarding Ethiopia's potential joining the Common Market of Eastern and Southern Africa's (COMESA) Free Trade Area (FTA) – which might be superseded by a Tripartite FTA (TFTA) combining the 26 members of COMESA, the Southern African Development Community (SADC) and the East African Community (EAC).

Ethiopia currently only is a member in one regional trade agreement, COMESA, and has not entered into the COMESA FTA. Therefore, Ethiopia is currently not concerned directly by overlapping agreements. However, this may change in the future given the ongoing/planned "spaghetti bowl" of Ethiopia's trade negotiations. If all of these are successfully concluded, Ethiopia would simultaneously be a member of TFTA, IGAD, SFC and the EPA, which might result in a complication of procedures and lack of transparency, thereby increasing costs for exporters and importers.

It appears that presently an overarching trade strategy is lacking in Ethiopia. This does not only refer to co-ordination of the various trade negotiations which are handled by different ministries – the Ministry of Trade and Industry, the Ministry of Finance and Economic Development, and the Ministry of Foreign Affairs. It also refers to the fact that there is no clear strategy for the links between regional trade negotiations and WTO accession, nor for the contribution and alignment of various trade negotiations and trade policies with Ethiopia's overall development strategies. The private sector in particular lacks an understanding of these issues.

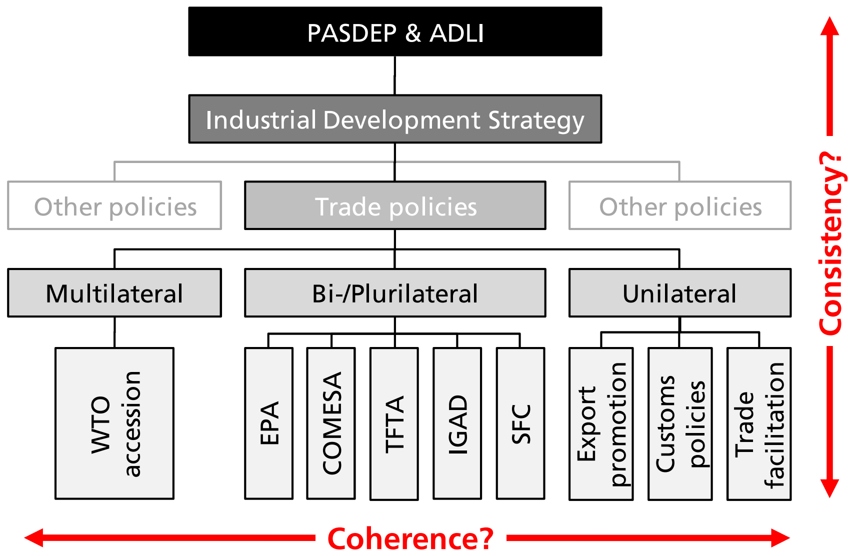
Against this background, the paper pursues a number of objectives. First, it assesses the likely implications for the Ethiopian economy of the ongoing and planned international trade negotiations in which Ethiopia is involved. Second, the paper aims at helping develop a coherent strategy for all of Ethiopia's current and international trade negotiations. Third, it raises awareness among the Ethiopian business community about the various international trade negotiations in which Ethiopia is involved and thus contributes to devising a positive and proactive agenda by forging consensus and commitment among private sector representatives and building a strategic partnership between public and private sector leaders in order to leverage regional and multilateral negotiations.

The structure of the paper is as follows. Section 2 describes the conceptual approach that has been taken to describe and assess the various trade negotiations and particularly the degree of coherence and consistency of Ethiopia's trade policies. Section 3 analyses the various negotiations individually, while section 4 addresses the spill-over effects, the synergies and conflicts between different agreements, as well as the impact of signing various overlapping agreements. Finally, section 5 provides some recommendations for an overarching Ethiopian trade strategy aimed at fostering the role of the private sector. This last section also provides suggestions for the private sector to make its voice heard louder in trade policy formulation and negotiations.

2 STREAMLINING TRADE POLICIES – CONCEPTUAL APPROACH

The standard approach to assess the costs and benefits of a given trade agreement, whether it is in force or being negotiated, consists of an economic assessment of its welfare implications, i.e. its effect on producer and consumer welfare, as well as on government revenues. Such analysis is commonly undertaken quantitatively by applying partial or general equilibrium models. While these research tools have been greatly improved over the past years, they still usually suffer from a number of shortcomings. First, by focusing on individual trade agreements or negotiations assessments necessarily are of a partial nature, ignoring the effects of overlapping agreements or simultaneous negotiations. Second, quantitative analyses are still best suited to assess the effects of changes in tariffs. Although nowadays models may incorporate certain non-tariff barriers to trade (NTB), the validity of quantifying NTB is still limited, especially in a developing country context.

Figure 1: Conceptual approach for assessing Ethiopia's trade policies



This paper attempts to address the first of these shortcomings by looking simultaneously at the various trade negotiations in which Ethiopia is involved. The conceptual approach chosen for doing so is shown in Figure 1.

From a conceptual point of view, a "good" trade policy must fulfil two criteria – it must be coherent and consistent. Consistency refers to the vertical dimension: Trade policies must contribute to the overarching goals as formulated in a country's key economic development strategies – in the case of Ethiopia this would be the Agricultural Development Led Industrialisation (ADLI) and the Plan for Accelerated and Sustained Development to End Poverty (PASDEP)[2], as well as the Industrial Development Strategy (IDS).

Coherence refers to the horizontal level, i.e. the fact that individual trade policies should reinforce each other. This means there should neither be conflicts between multilateral, regional/bilateral and unilateral policies, nor among the various different regional/bilateral negotiations and agreements in which Ethiopia is engaged.

This paper focuses on an analysis of coherence of the various trade negotiation forums in which Ethiopia is currently involved. It does so in several stages. First, the impact of the individual trade negotiations at both the multilateral and bi- and plurilateral levels is assessed separately by looking at offensive interests – i.e. export opportunities generated by trade agreements – and defensive interests resulting from an increase in competition on the domestic market caused by trade agreements. This stage of the analysis is the conventional "impact assessment," and much work in this regard has already been undertaken in other studies. Accordingly, this first stage will mainly be based on a review of existing studies.

In a second stage, the spill-over effects of trade agreements (synergies and conflicts) will be analysed. This will mainly be done in a qualitative way, as many of the issues at stake – costs of overlapping membership, sequencing issues, etc. – are not suitable for a quantitative assessment.

Third, the compatibility of Ethiopia's unilateral trade policy measures with the requirements of trade agreements will be discussed. At this stage the paper will also address the issue of relevance of trade negotiations. Do they address the key constraints for exports and the key impediments for international competitiveness? For example, as other research has shown (cf. Ciuriak 2010), trade agreements might not be the most important tool for export promotion.

[2] The successor to PASDEP, the Growth and Transformation Plan (GTP), is currently being developed.

3 ETHIOPIA'S INTERNATIONAL TRADE NEGOTIATIONS – THE FORUMS

As mentioned above, Ethiopia's international trade negotiations take place at two levels. At the multilateral level, accession to the WTO will determine Ethiopia's trade relations with all countries with which it has no preferential trade agreements (PTA). The bi- and plurilateral level concerns these PTAs. Ethiopia is currently negotiating two different types of negotiations: the Economic Partnership Agreement with the European Union is a classical North-South agreement, whereas the TFTA, COMESA FTA, IGAD and SFC are all Sub-Saharan regional economic integration agreements, i.e. South-South cooperation. This section briefly outlines the status of each of the various negotiations and analyses the likely impact on the Ethiopian private sector. It should be noted that the impact on consumers and government revenues is not addressed.

3.1 WTO Accession[3]

Ethiopia applied for WTO membership on 13 January 2003. The Memorandum on the Foreign Trade Regime (MFTR) was submitted to the WTO in December 2006, and questions and answers regarding the MFTR have been exchanged. A first Working Party Meeting was held in May 2008, with another one being scheduled for summer 2009. The accession negotiation process is thus well under way. According to the WTO accession road map, accession is planned for 2013.

Offensive interests

Improved market access for Ethiopian export goods could result from a reduction of tariffs or non-tariff barriers applied by Ethiopia's trading partners. Will WTO accession result in such an improved market access? By and large, the answer is negative.

It is true that by becoming a member of the WTO a country benefits from the core WTO principles, the non-discrimination and most-favoured nation (MFN) principles. WTO members must not normally grant a special favour (such as a lower customs duty rate for certain products) to a certain trading partner. In principle, the most favourable market access conditions provided to any trading partner must be applied to all trading partners which are also WTO members, i.e. the same tariff rate and other market access conditions apply to all WTO member trading partners. It is however theoretically possible that WTO members discriminate between WTO members and trading partners which are not members of the WTO, by treating the former more favourably. Nevertheless, in practice such discrimination does not take place and non-members normally enjoy the same market access conditions as WTO members under the MFN principle.

3 This section is based on Bienen (2009).

What is more, as a least developed country (LDC) Ethiopia enjoys quota- and duty free access to a number of major export markets including the USA (under the African Growth and Opportunities Act, AGOA), and the EU (under the Everything But Arms initiative, EBA), and to a more limited extend also China[4]. Thus, Ethiopia already enjoys market access conditions in important export markets which are actually more favourable than WTO MFN conditions.

It has been argued that the preferences which Ethiopia enjoys under AGOA, EBA and other schemes can be withdrawn unilaterally. Therefore, WTO accession would provide enhanced predictability of market access for Ethiopian exports in the long run.

However, a withdrawal of the existing preference schemes appears to be highly unlikely. Not only would such a move damage the reputation of the withdrawing country, there are also discussions going on as part of the Doha Development Agenda to convert unilateral preference schemes into multilateral and permanent schemes.

In sum, by acceding to the WTO market access conditions – both tariffs and non-tariff measures – would remain largely unchanged for Ethiopia. Does this mean that WTO accession is irrelevant for Ethiopia's exports? Certainly not.

Only by becoming a member of the WTO Ethiopia will be able to participate in the discussions about future conditions of market access for its exports. Although there has been a long and heated debate about the question whether or not the WTO represents the interests of industrialised countries at the expense of developing countries, it is undeniable that developing countries have been increasingly active in putting their cause forward in the multilateral negotiations. If Ethiopia remained outside of the WTO it would be barred from entering into these negotiations and representing its own interests – while at the same time being affected by the negotiation outcomes.

Defensive interests

WTO accession does not come without a cost. In the process of acceding to the WTO Ethiopia will have to make certain offers to open its domestic markets to WTO members. Does this mean that imports will increase and the Ethiopian private sector, notably companies competing with imports, will face more competition on the domestic market? And if this was the case, would increased imports have a positive or negative effect on the private sector? In order to answer these questions, trade in goods and trade in services must be addressed separately.

An increase in the *importation of goods* could be caused primarily by a reduction of import tariffs but also through a variety of other policy measures, such as changes in customs procedures and fees, changes in government procurement, competition policy, etc.

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4 In January 2010 China and Ethiopia signed a trade agreement based on which 95% of Ethiopia's products can be exported to China duty-free, http://www.newbusinessethiopia.com/index.php?option=com_content&view=article&id=59:china-ethiopia-to-boost-trade-to-three-billion-usd-&catid=35:trade&Itemid=12.

In the short run, WTO accession will not lead to an across-the-board reduction of Ethiopian import tariffs. Although Ethiopia will have to negotiate import tariff limits with WTO members, these refer to what are called "bound tariffs" in WTO terminology, not actually applied tariffs. Once a WTO member has bound a tariff at a certain rate, it may not raise its applied tariffs above that bound level without compensating the affected parties. Conversely, WTO members are free to increase their applied tariff up to the bound rate. For countries which have acceded to the WTO so far, the average ratio of bound tariffs to applied tariffs is 1.6, i.e. tariffs were bound 60% higher than applied tariffs. Thus, there is no general requirement to reduce tariffs as a result of accession. However, Ethiopia will limit its policy space for potential future increases in tariffs.

It should also be mentioned that certain WTO members may request an actual reduction of applied tariffs for certain products. As an example, the latest LDC acceding country so far, Cape Verde, committed to an elimination of import duties on components for civil aviation aircraft and office equipment over a transition period of 10 years. Note, however, that Cape Verde has no domestic production in either of these industries – which means that the domestic private sector is not negatively affected by these commitments.[5]

In the long run, the WTO principle of progressive liberalisation will mean that eventually Ethiopia will have to reduce its import tariffs provided that WTO members agree on further cuts of bound tariffs in future – i.e. post Doha – multilateral negotiation rounds. Assuming that Ethiopia commits to an average tariff 60% higher than applied tariffs, and keeping in mind that the average reduction of bound tariffs for non-agricultural goods in previous WTO negotiation rounds was approx. one third each time, Ethiopia will have to reduce its applied tariffs after the second post-Doha round. Given that the period between the conclusion of negotiation rounds is more than ten years, it should be clear that a general obligation for Ethiopia to reduce import tariffs because of WTO membership is indeed a very long-term perspective.

The situation is somewhat different in the *services sectors*. Here, Ethiopia will be expected to make commitments regarding market access for and national treatment of foreign services providers. The breadth – in which services sub-sectors commitments are made – and depth – how liberalising commitments are – is to be negotiated during accession negotiations. However, it is clear that certain WTO members expect Ethiopia to *actually* open important services sub-sectors, including the financial services and telecommunication services sectors. Thus, WTO accession will mean that Ethiopia has to actually liberalise its services trade regime.

So far, the likelihood has been addressed that Ethiopia will have to actually liberalise its import regime as a result of accession to the WTO. This might indeed be the case, particularly in some services sectors. The question therefore arises whether or not such trade liberalisation and the resulting increase in competition on the domestic market are good or bad for the Ethiopian private sector.

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5 On the other hand, the reduction in tariffs of course reduces Cape Verde's government revenues.

This question is easier asked than answered, and several studies have attempted to shed light onto the likely impact of trade liberalisation induced by WTO accession on the Ethiopian economy and various sectors.[6] The main finding of these studies is that overall, trade liberalisation is beneficial but there will be winners and losers. Thus, while WTO accession in the long run will be good for the private sector at large, it is likely to be bad for some. If we look at the liberalisation of goods imports, this will have a clear positive impact on the private sector if it concerns imports which are used as inputs for domestic production and which are not produced domestically, e.g. many types of machinery. The industries concerned will then be able to reduce production costs. Conversely, liberalisation of imports which are also domestically produced will put additional competitive pressure on the domestic producers, and they will then either have to adjust or close down.

The effects in services sectors are similar: the overall effect of services liberalisation for the private sector may well be positive, as increased competition on the domestic market is likely to reduce prices and/or increase the quality of services. For example, more reliable and cheaper energy and telecommunication services would benefit the private sector at large. At the same time, companies in the sectors to be liberalised are likely to come under pressure.

In sum, Ethiopia's accession to the WTO would bring about few changes, at least in the short run, for the Ethiopian private sector, except possibly in some services sub-sectors. In the long run, however, accession will be a catalyst for change and will strengthen the role of the private sector in the economy. This will be the main benefit – not improved market access for Ethiopian goods or cheaper import of inputs.

3.2 Economic Partnership Agreement with the European Union

Relations between the group of African, Caribbean and Pacific (ACP) countries, among them being Ethiopia, and the European Union have long been governed by a series of treaties which have provided a framework in all areas of cooperation including trade and development aid. The latest of these, which has been in force since 2000, is the Cotonou Agreement. Nevertheless, as the Cotonou Agreement was found to violate principles of the WTO it was given a waiver until 2008 in order to negotiate a WTO compatible agreement. In response, in 2002 the EU and the ACP countries started negotiating Economic Partnership Agreements which would become the new trading arrangements due to enter into force by January 2008. These negotiations have been undertaken separately between the EU and different regional ACP configurations. Ethiopia is currently engaged in these negotiations under the Eastern and Southern Africa (ESA) configuration.

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[6] Examples of studies focussing on Ethiopia are Bienen (2005), Dejen et al. (2006), Kiyota et al. (2007), Alemu et al. (2010).

From the outset, negotiations proved to be difficult. The ESA countries expected that the EPA would take account of their different needs and levels of development in order to serve as a tool for development and give them the chance to reduce poverty by solving supply side constraints by reforming their infrastructure and adjusting their production capacities. Moreover, the negotiations were initially understood to be an instrument for the creation of bigger regional markets that would ultimately stimulate trade and investment in the region. During the course of the negotiations, however, the considerations of the EU became less ambitious and more pragmatic. The purpose of the EPA was now seen to make it as much as possible compatible with WTO rules, thereby essentially reducing it from a far-reaching co-operation agreement to a preferential trade agreement, with some non-trade development aspects attached.

As it became clear that the ESA-EPA negotiations would not be concluded by the end of 2007, in an attempt to reach a WTO compatible agreement the EU tabled an Interim EPA (IEPA) which covered only trade in goods. Although some members of the ESA group signed the IEPA, Ethiopia chose not to do so as it felt that a "concrete and legally binding commitment on development chapter from EU side was lacking" (Geremew 2010: 9).

Not signing the IEPA came at practically no cost for Ethiopia. Being an LDC, Ethiopia's trade with the EU has been governed by the EBA rules since 2008, which means that all goods except arms can still be exported to the EU markets duty free and quota free.

When assessing the impact of the EPA on the Ethiopian private sector[7], it is clear that trade in goods is primarily raising defensive interests. As Ethiopia's exports to EU markets already enjoy free entry there is little to be gained from this part of the negotiations. Conversely, Ethiopia will be expected to gradually eliminate its import tariffs for substantially all trade. While the coverage of "substantially all trade" (or, conversely, the extent and composition of sensitive product lists) as well as the length and characteristics of the tariff reduction phase are still under negotiation, it is clear that the EPA would lead to growing competition for domestic producers from European producers.

The net effect of increased imports is indeterminate *a priori*, as has been explained above – if it leads to cheaper and or better inputs for domestic production it may help to strengthen the competitiveness of the Ethiopian private sector. Conversely, if it leads to increased imports of consumer goods and replaces domestic production of these, the private sector will incur a net loss (although consumers will still gain). In any case, trade liberalisation under the EPA will create winners and losers in the Ethiopian private sector.

Negotiations of the EPA are still going on, with still a number of contentious issues existing, ranging from the timeframes for tariff liberalisation of ESA parties to special agricultural

[7] A number of studies have been undertaken to assess the implications of EPA on the Ethiopian and other African economies, but many of these focus on the fiscal effects. Examples of studies with a broader focus include Karingi et al. (2005) and Morrissey/Zgovu (2008).

safeguards and rules of origin, and modification of tariffs.[8] Development continues to be a cross-cutting contentious issue. The importance of these issues is such that a failure of negotiations is now a real option. As Geremew states:

> "After eight years of intensive negotiation, most ESA countries engaged in the negotiations are now showing fatigue and reluctance, to the EPA. These days, most countries perceive the EPA as a cost to be paid to continue enjoying the Lomé acquis, rather than an opportunity. The prime option on which the negotiations are focusing now is merely on maintaining the preferential market access to the EU and securing policy space in the agreement, while making minimal commitments in terms of opening markets or regulatory reforms. [...] In Ethiopia's context, unless the EPA is accompanied with substantial development support through additional resource above and beyond the EDF and Aid for Trade, the trade effect of the EPA on Ethiopia would be felt more on the import side and could result in revenue losses and expose few and potential industries to more competition, with a possibility of closure and job loss rather than additional or new markets. [...] Therefore, the country should be keen to come up with an agreement that would be beneficial to both sides. Otherwise it would be unwise to rush for signing the agreement for the purposes of completing the agreement without getting a balanced deal as a country" (2010: 21f).

In view of this, more research would be welcome focussing on the potential longer-term costs of Ethiopia not signing the EPA.

3.3 Tripartite Free Trade Area of COMESA, EAC and SADC

The establishment of the TFTA was decided at the 2008 Tripartite Summit held in October 2008 in Kampala. In early November 2009, a road map for the TFTA was discussed in Tanzania, with the consultation process in potential member states currently under way. If all members of the three regional economic communities join the TFTA this would create a free trade area comprising more than 560 million people, and a combined GDP of USD 873 billion (in 2008; Table 1).

The purpose of the TFTA would be to harmonise trade arrangements among SADC, COMESA and EAC, to improve the movement of persons within the region, facilitate the joint implementation of infrastructure projects and enhance co-operation of members. One of the issues to be addressed by the TFTA is the overlapping membership of several members of the three communities which so far has created problems due to differences in procedures, application of rules of origin etc.

For Ethiopia, three policy options in relation to the TFTA exist. It could maintain the status quo, i.e. not join the COMESA FTA nor the TFTA. Alternatively, it could join the COMESA FTA but not the TFTA. Thirdly, it could join the TFTA when this comes into existence. If Ethiopia decides to join the COMESA FTA or the TFTA, decisions will have to be taken when and under which conditions Ethiopia would become a member of the FTA, and which domestic measures should be taken in order to maximise the benefits, and minimise the costs, of FTA membership.

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[8] For more details, see Geremew (2010, in particular pages 9-11).

Table 1: Population and GDP of TFTA countries, 2008

Country	GDP (current USD M)	GDP (% of total)	Population	Population (% of total)
Angola	83,383	9.55%	18,020,668	3.18%
Botswana	12,969	1.48%	1,904,991	0.34%
Burundi	1,163	0.13%	8,074,254	1.43%
Comoros	530	0.06%	643,571	0.11%
Congo, Dem. Rep.	11,588	1.33%	64,205,366	11.33%
Djibouti	875	0.10%	847,732	0.15%
Egypt	162,818	18.64%	81,527,172	14.39%
Eritrea	1,654	0.19%	4,996,203	0.88%
Ethiopia	**26,487**	**3.03%**	**80,713,434**	**14.25%**
Kenya	34,507	3.95%	38,534,087	6.80%
Lesotho	1,622	0.19%	2,016,823	0.36%
Libya	99,926	11.44%	6,276,631	1.11%
Madagascar	8,970	1.03%	19,110,941	3.37%
Malawi	4,269	0.49%	14,278,404	2.52%
Mauritius	8,651	0.99%	1,268,835	0.22%
Mozambique	9,735	1.11%	21,780,614	3.84%
Namibia	8,564	0.98%	2,114,160	0.37%
Rwanda	4,457	0.51%	9,720,694	1.72%
Seychelles	833	0.10%	86,334	0.02%
South Africa	276,764	31.68%	48,687,000	8.59%
Sudan	58,443	6.69%	41,347,723	7.30%
Swaziland	2,618	0.30%	1,167,834	0.21%
Tanzania	20,490	2.35%	42,483,923	7.50%
Uganda	14,529	1.66%	31,656,865	5.59%
Zambia	14,314	1.64%	12,620,219	2.23%
Zimbabwe	3,418	0.39%	12,462,879	2.20%
Total	**873,580**	**100.00%**	**566,547,362**	**100.00%**

Note: All values for 2008 except GDP of Zimbabwe (2005)
Source: World Development Indicators

The higher the volume of trade between the members of the TFTA, the higher are potential costs and benefits. Therefore, the volume of trade between Ethiopia and the other would-be members of the TFTA needs to be assessed. As the following summary of Ethiopia's export performance shows there may indeed be untapped export potential for Ethiopia in the TFTA region: total Ethiopian exports have outperformed its exports to the TFTA countries.

The volume of Ethiopia's trade with (would-be) TFTA members has been limited (Figure 2). Although imports from the TFTA increased from USD 108 million in 2001 to USD 407 million in 2009 (at an average 18% per year), overall imports in the same period increased even faster (at 25% per year). Therefore the share of imports from the TFTA members in total Ethiopian imports decreased from 6.0% in 2001 to 3.7% in 2008.

The performance of Ethiopian exports to the TFTA region was even less dynamic: Over the period 2001 to 2009, exports increased at an average 14% per year from USD 77 million to USD 211 million. Total exports grew almost twice as fast, at 24% per year, and hence the importance of TFTA countries as an export destination decreased sharply: whereas in 2001, 19.1% of Ethiopia's exports went to the TFTA region this share was reduced to 9.7% in 2009. Thus, contrary to the regional trend, Ethiopia's trade with TFTA members has grown less rapid than trade with the rest of the world. In this context, it is worthwhile to note that Ethiopia's export growth to the TFTA region is almost entirely explained by its exports to Sudan (mainly vegetables and coffee), whereas exports to the other 24 countries grew at a mere 1.6%.

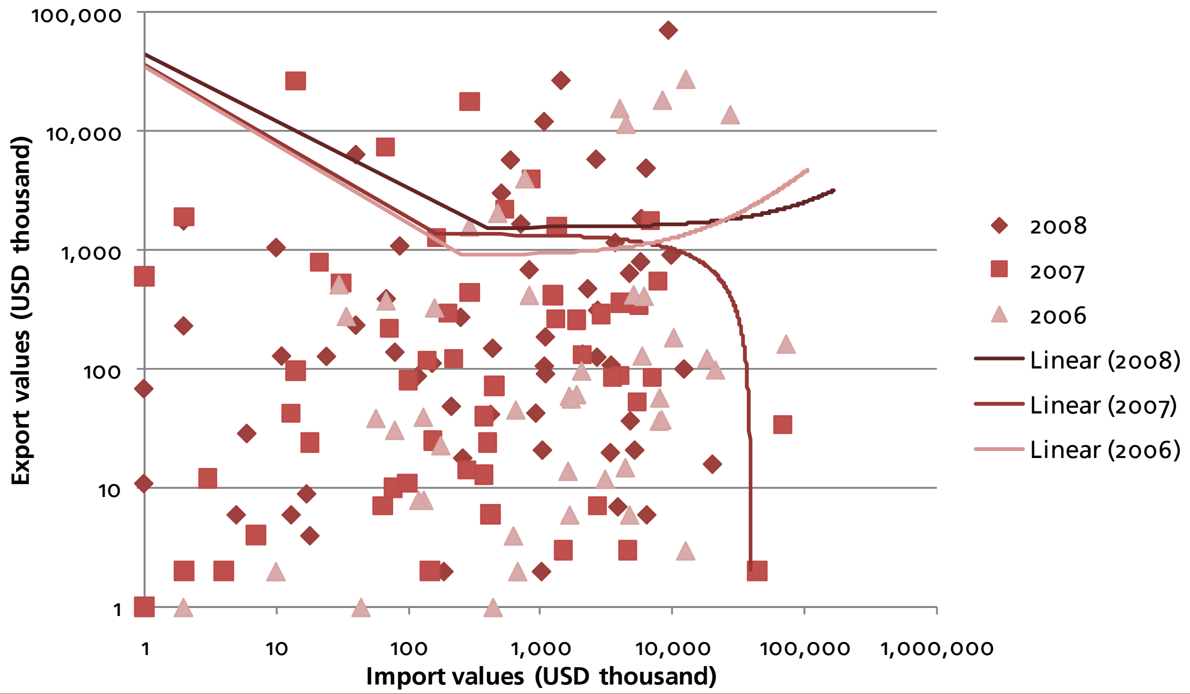
Figure 2: Ethiopia's trade with TFTA countries, 2001-2009

Source: UN COMTRADE.

The importance of TFTA markets for Ethiopian exporters could be limited because of three reasons: First, there could be little to trade (similar economic structures which do not create strong comparative advantages); second, Ethiopia's private sector could lack competitiveness compared to the other would-be TFTA members (then one would expect high imports by Ethiopia from these); third, barriers to trade are so high as to effectively prevent high trade volumes. The core question is: What are the key issues for Ethiopian exports to TFTA markets, and does the TFTA address them? This question deserves a detailed analysis and answer which cannot be provided in this paper. Nevertheless, some preliminary thoughts are provided in the following paragraphs.

First, there are indeed indications that economic structures of the TFTA countries are similar. Ethiopia's trade patterns with COMESA partners show limited degrees of specialisation – the same goods are both exported and imported (Figure 3). However, it appears that specialisation is on the increase, and this might be further advanced by Ethiopia's joining the TFTA. It should also be noted that the brief analysis undertaken took place at an aggregate (2 digit HS) level, which means that actual specialisation existing within HS chapters would not have been detected.

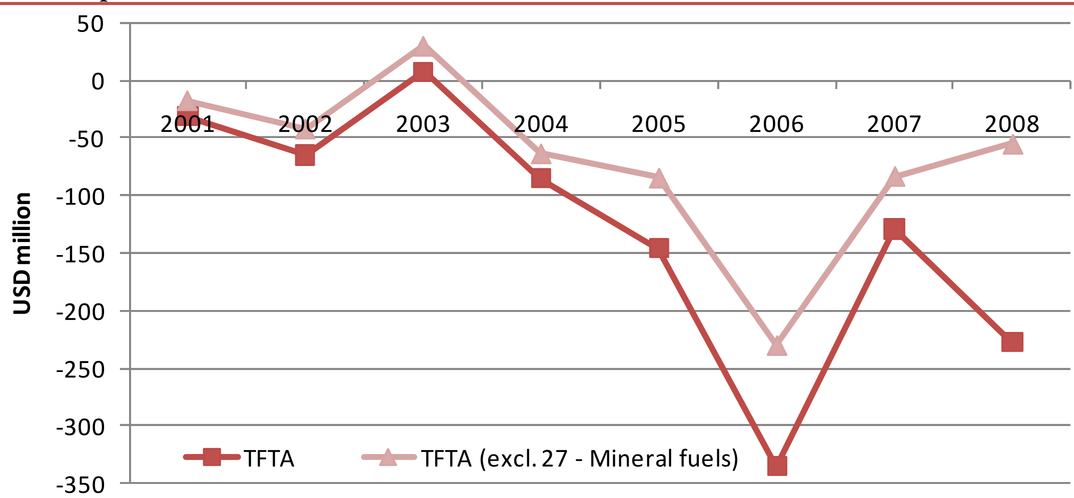
Figure 3: Ethiopia's trade with COMESA: exports by product group vs. imports by product group, 2006-2008



Ethiopia's trade with COMESA shows little sign of specialisation. If this was the case, goods in which Ethiopia was specialised should be exported, and other goods imported. However, in Ethiopia there is no clear relationship between goods which are exported and imported – there is a slightly positive linear relationship between imports and exports in 2006 and 2008, but a slightly negative one in 2007.
Source: Calculations based on UN COMTRADE, see Table 3 and Table 4 in annex.

With regard to the second question, although there is little doubt that Ethiopia's private sector lacks competitiveness compared to global standards, this does not seem to be the case in relation to the other would-be TFTA members. There is an overall deficit in trade with TFTA countries but this is largely explained by imports of mineral oils. Thus, the bilateral trade balance with TFTA countries excl. mineral oil improved substantially over the past four years reaching a relatively low deficit of USD 55 million in 2008 (Figure 4). Therefore, the Ethiopian private sector can compete regionally.

Figure 4: Ethiopia's trade balance with TFTA countries, total and total non-oil trade, 2001-2008

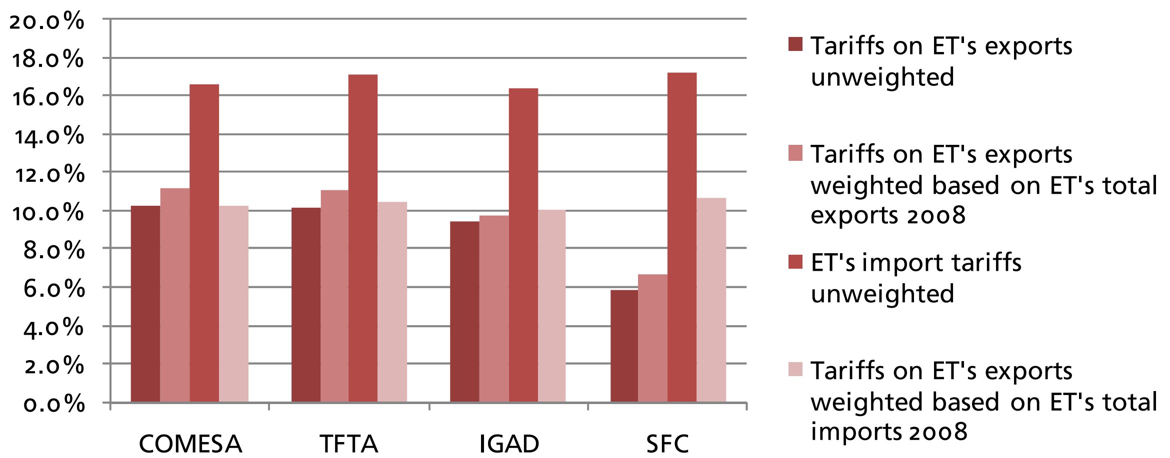


Source: UN COMTRADE.

Thirdly, if the limited importance of Ethiopian exports is due to trade barriers, joining the TFTA will be worthwhile if it contributes to overcoming identified barriers, both tariffs and non-tariff barriers.

The TFTA aims at eliminating import tariffs in intra-TFTA trade. Obviously, the higher current tariffs applied on Ethiopian exports, the more will tariff cuts expand market opportunities and stimulate Ethiopia's exports, other things being equal. Currently, average tariffs applied by the would-be TFTA members to Ethiopia's exports are 10.1%, based on unweighted averages (Figure 5). Since high tariffs deter trade, averaging tariffs on a trade-weighted basis tends to understate the effective protection provided by the importing jurisdiction's tariff structure. For example, weighted by Ethiopia's exports to the TFTA region, the average TFTA tariff facing Ethiopia falls to 9.8%. Using the importing jurisdiction's import statistics to measure Ethiopia's exports to that jurisdiction, the average TFTA weighted tariff is even lower at 8.9% (using 2008 trade weights). Conversely, weighting by Ethiopia's world-wide exports yields a TFTA-wide average tariff facing Ethiopia of 11.5% (again with 2008 trade weights). The higher average obtained using Ethiopia's worldwide exports as the basis for weights reflects the fact that TFTA regional tariff structures tend to be higher in areas of Ethiopia's global comparative advantage. In turn, this pattern of regional protection is a contributing factor to the low share of TFTA partners in Ethiopia's global exports.

Figure 5: Average tariffs on Ethiopian trade with TFTA and other regional groupings, 2008



Source: Author's calculations based on ITC Market Access Map (www.macmap.org) and UN COMTRADE; see Table 7 and Table 8 in annex.

Moreover, there are vast differences between countries, ranging from 0.0% average tariff in Libya and 0.2% in Mauritius to as high as 49.4% in the Seychelles on a weighted average using Ethiopia's worldwide 2008 exports as a basis for weights (Table 7 in annex). Similarly, there is a wide variation across product groups, ranging from many zero duty product groups to 730% on essential oils in Egypt. Not surprisingly, Ethiopia exports no essential oils to Egypt although it did record USD 2.5 million in worldwide sales in this category. The tendency of trade protection to be especially high in areas where trade potential is particularly strong (referred to in the trade literature as reflecting the "endogeneity" of trade protection) raises significant difficulties for the evaluation of the impact of trade liberalisation.

To evaluate the impact on Ethiopia's economy of the elimination of tariffs by all TFTA countries requires taking into account both the impact of reduction of TFTA partner tariffs on Ethiopia's exports and the impact of the elimination of Ethiopia's (high) tariffs on TFTA imports, including both the effect of tariff reduction in creating trade (i.e., the substitution of regional imports for domestic production), and diverting trade (i.e., the substitution of regional trade for trade with the rest of the world). Potential negative effects of Ethiopia's membership in the TFTA may consist in domestic industries being negatively affected by increased imports from TFTA countries, which will become relatively cheaper as a result of tariff liberalisation and the removal of NTB. The scope of this negative effect will increase with the level of tariffs in the pre-liberalisation situation. In Ethiopia, simple (unweighted) average tariffs on imports from COMESA FTA members are 16.3%, and 17.1% on imports from TFTA countries. However, average Ethiopian import duties are considerably lower when weighted with import values: 8.8% on goods imported from COMESA, and 9.0% on imports from TFTA countries.

Applying a conventional trade model[9] to analyse the impact of intra-TFTA tariff elimination suggests an export gain for Ethiopia on the order of about USD 65 million (plus or minus about USD 25 million depending on assumptions about the response of trade and production to tariff cuts), to TFTA partners. At the same time, given that Ethiopia's trade protection against regional trade partners is, on average, higher than the trade protection which it faces in its export markets, together with the fact that it has a significant trade deficit with regional partners, reciprocal tariff elimination tilts the economic gain from trade liberalisation for Ethiopia towards consumer gains in the form of lower prices rather than production gains. Thus the increased exports to the region are more than offset by increased imports from the region of about USD 250 million (plus or minus about USD 100 million depending on assumptions about the response of trade and production to tariff cuts). Taking into account the negative impact of intra-TFTA tariff elimination on Ethiopia's fiscal revenues, the aggregate impact of intra-TFTA tariff liberalisation for Ethiopia, given the starting trade context, would therefore likely be negative.

Nevertheless, it should be kept in mind that although Ethiopia has traditionally been a net importer from the TFTA region, since 2006 the trade deficit could be reduced substantially. As mentioned above, excluding imports of mineral fuels, the trade balance with TFTA countries

[9] The modelling results referred to here are obtained using the Global Simulation Model (GSIM), version 2, developed by Francois and Hall, that is available in spreadsheet form and which is being incorporated in the United Nations WITS/TRAINS trade analysis tools. GSIM is a partial equilibrium model based on the assumption that products are differentiated by country of origin. They are imperfect substitutes, with the degree of substitutability represented by the elasticity of substitution. This model allows the simultaneous evaluation of the impact on export and import flows amongst the TFTA partners as well as with the rest of the world from reduction of tariffs on intra-regional trade. The model results are largely driven by the assumptions about supply and demand elasticities which describe the response of production and demand in each economy to changes in price caused by policy changes such as tariff elimination, together with estimates of the elasticity of substitution, which measures the readiness of consumers to switch between competing domestic and imported products based on price changes. For a fuller discussion, see Ciuriak (2010).

improved from USD -230 million in 2006 to USD -55 million in 2008. As a result, the above mentioned net negative effect may be somewhat overstated.

The impact of NTB – such as Sanitary and Phytosanitary Standards (SPS), technical standards, customs procedures, rules of origin, etc. – on Ethiopian exports to TFTA markets cannot be quantified. Although no data exist on their negative impact on Ethiopian exports, anecdotal evidence suggests that NTB are more important than tariffs. The importance of NTB is also explicitly acknowledged in the Draft Report for establishing the TFTA, which accordingly proposes various measures to address and reduce NTB. An effective reduction of NTB under the TFTA would create substantial benefits for Ethiopian exports and would be a strong argument in favour of joining the TFTA. Among the issues to be addressed by the TFTA in this regard are infrastructure programmes that would provide improved access to the sea and an efficient intra-TFTA transit scheme. Harmonised trade facilitation and customs procedures are also foreseen and would benefit Ethiopian exporters. It is also planned that the TFTA would liberalise the movement of business persons which would facilitate both imports and exports, as well as cross-border business in general. Finally, an important benefit from the TFTA could result from more efficient services sectors. However, the first stage of the TFTA does not include liberalisation of trade in services.

So far, the potential benefits for the Ethiopian private sector of joining the TFTA have been analysed leaving aside the behaviour of other countries. However, a – potentially important – further benefit from joining the TFTA would consist of avoiding the opportunity costs of not joining the TFTA. If other COMESA countries become members of the TFTA whereas Ethiopia remains outside, then the products of the other countries in non-COMESA TFTA countries become relatively cheaper: they will benefit from the removal of tariffs which will continue to be levied on Ethiopian exports. Thus, other countries will expand or open up these markets and have a first mover advantage over Ethiopian exports.

3.4 COMESA Free Trade Area

COMESA was established in 1994, replacing the former Preferential Trade Area which had existed since 1981. The COMESA FTA was launched in 2000 when nine of the member states eliminated their tariffs on COMESA originating products, in accordance with the tariff reduction schedule adopted in 1992. The COMESA FTA today comprises 16 of the 19 member states (all but DR Congo, Eritrea and Ethiopia – but Ethiopia grants a 10% discount on MFN import tariffs to COMESA members). The COMESA customs union was launched officially in June 2009 and is currently in the process of being implemented.

As all countries which would be members of the TFTA are also members of COMESA, assessing the impact of COMESA FTA membership for Ethiopia is very similar to the assessment of TFTA membership. The only difference is that both benefits and costs of tariff elimination will be lower. Thus, as Ethiopia has higher tariffs on imports from COMESA than its exports to COMESA face, and has a trade deficit with COMESA countries (although shrinking), it can be expected that there will be a (limited) net loss from tariff cuts.

In contrast to the TFTA, which has yet to be launched, the COMESA FTA has been operating for quite a while and therefore one should be able to show the effect is has had on trade flows in the region. Nevertheless, it is difficult to assess if it has had an effect on Ethiopia's trade with other African countries because the level of preferences Ethiopia enjoys from other COMESA members is limited. *Prima facie*, when looking at the intra-regional distribution of Ethiopia's trade it seems more driven by geographic proximity (relatively high level of trade with Djibouti, Egypt, Kenya and Sudan) and economic size of the partner country (relatively high level of trade with South Africa). The impact of the preferential treatment of Ethiopian exports by COMESA countries does not appear to have had any positive effect so far, as export performance to COMESA has been disappointing (Table 4 in annex). Whether this is due to the limited preferences which Ethiopian exports enjoy, existing non-tariff barriers applied by COMESA countries or other factors is not clear.

Nevertheless, the impact of COMESA on member states does not only come from tariff liberalisation under the FTA and customs union. COMESA is a comprehensive regional integration arrangement which has established various programmes to facilitate economic integration, ranging from infrastructure programmes to private sector development and investment promotion. Although a quantification of these efforts to remove NTB is very difficult, and an assessment of their effectiveness beyond the scope of this paper, it is generally estimated that they can be more important than tariff liberalisation measures.

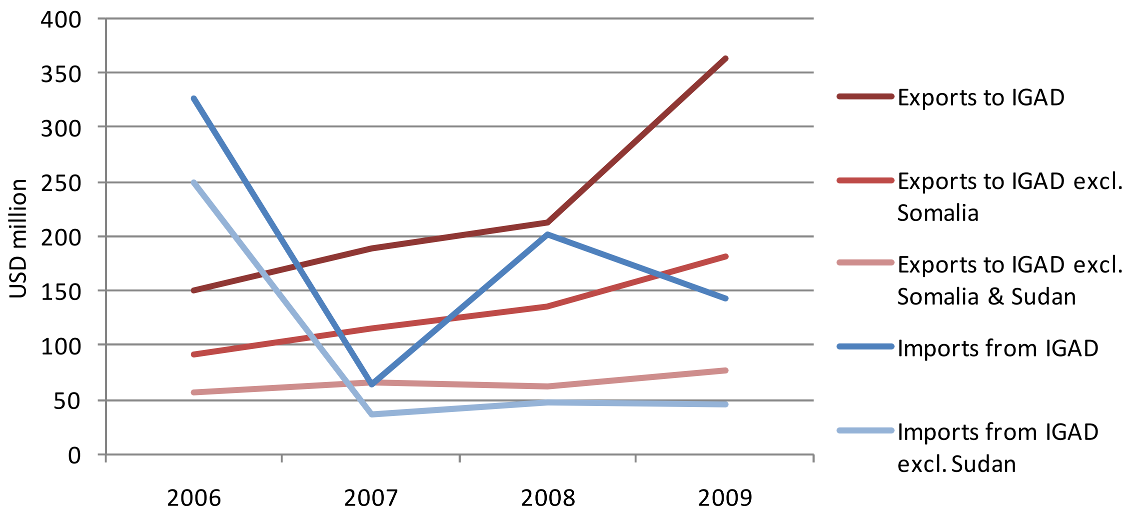
3.5 Intergovernmental Authority on Development

The Intergovernmental Authority on Development (IGAD) in Eastern Africa was created in 1996. Originally being an organisation to address the devastating effects of recurring and severe droughts and other natural disasters, which had caused widespread famine, ecological degradation and economic hardship in Eastern Africa, the mission of IGAD was later expanded to include economic cooperation in broader terms. IGAD has seven members, Djibouti, Eritrea, Ethiopia, Kenya, Somalia, Sudan and Uganda. These countries share a common dependency on agriculture that accounts for more than half the GDP of most individual members, a significant part of their export revenue and employment.

In 2008 IGAD members took a decision to strengthen IGAD's structure and functioning to enable it to more effectively implement its mandate on regional integration. A key element of this integration is economic – building upon the success that has been achieved in the implementation of individual projects to create a framework within which further economic integration can proceed. Such further integration includes establishment of a preferential trade area, from which could emerge a free trade area, customs union and common market in the medium to long term.

The effects of IGAD on the Ethiopian private sector are likely to be positive but limited. Unlike Ethiopia's trade with COMESA or the TFTA countries, Ethiopia has a trade surplus with IGAD countries, and exports to IGAD countries have been increasing faster than overall Ethiopian exports, i.e. regional trade has developed more dynamically than exports on average. Nevertheless, exports to IGAD are mainly directed to Somalia and Sudan (Figure 6). As it is not clear if exports to Somalia are subject to import tariffs the actual impact of and IGAD FTA on Ethiopia's exports are difficult to assess.

Figure 6: Ethiopia's trade with IGAD countries, 2006-2009



Source: Author's calculations based on UN COMTRADE.

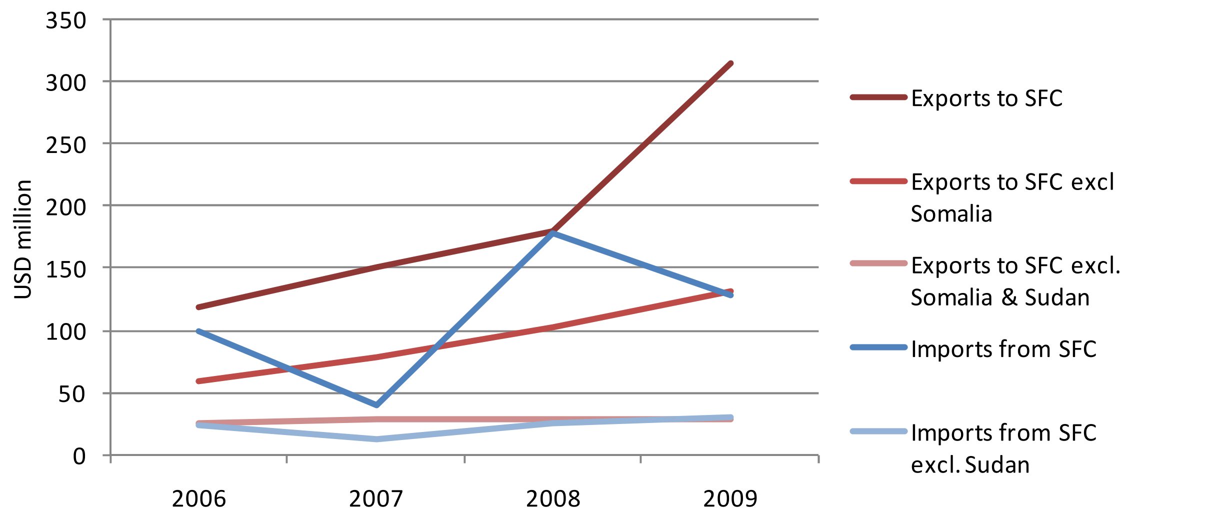
Similarly, imports from IGAD mainly constitute of oil imports from Sudan. If these are excluded from the analysis, Ethiopia hardly imports anything from the IGAD countries – total Ethiopian imports from IGAD excluding Sudan decreased from 4.8% of total imports in 2006 to a mere 0.4% in 2009. Hence, opening up the Ethiopian market for IGAD partners is unlikely to cause any significant harm to Ethiopian producers.

3.6 Sana'a Forum for Co-operation

The SFC is the smallest regional organisation in which Ethiopia is a member. It has five member countries (Ethiopia, Djibouti, Somalia, Sudan and Yemen), which agreed to promote regional economic and trade cooperation through trade liberalisation to develop their natural and human resources for the mutual benefit of their people. The SFC was established in December 2003 in Addis Ababa by Ethiopia, Sudan and Yemen. Somalia officially joined the Forum at the 3rd Summit held in Khartoum in December 2004. Djibouti joined in 2008.

One of the basic objectives of the SFC is to enhance and promote trade among the member states through liberalisation of their trade regimes. One key mechanism to facilitate trade is through the removal of tariff and non-tariff barriers. Nevertheless, at this stage no decision with regard to the timing and modalities of the establishment of an FTA has been taken – the SFC members commissioned a study to assess the possibility of establishing an FTA and its impact on the member state economies, but these studies appear to be still under preparation. Nevertheless, the brief assessment made above for IGAD will be true for the SFC: as trade with SFC countries excluding Somalia and Sudan is virtually non-existent (imports and exports in 2009 were approx. USD 30 million each; Figure 7), i.e. the expected benefits and costs for the Ethiopian private sector are likely to be very limited.

Figure 7: Ethiopia's trade with SFC countries, 2006-2009



Source: Author's calculations based on UN COMTRADE.

4 SYNERGIES AND CONFLICT BETWEEN TRADE ARRANGEMENTS

4.1 WTO Accession and Preferential Trade Agreements

As has been argued above, Ethiopia's accession to the WTO would bring about few changes, at least in the short run, for the Ethiopian private sector, except possibly in some services sub-sectors. Why, then, should the organised private sector push for WTO accession? Aren't EPA negotiations and other regional trade agreements more important?

It is true that preferential trade agreements such as the EPA or the regional agreements have a more important impact on the Ethiopian economy in the short run, because they are likely to require an actual liberalisation of Ethiopia's foreign trade regime. However, the impact of WTO accession in the medium and long run should not be underestimated. WTO accession will change the rules of doing business in Ethiopia by strengthening the forces of the market. Competition will gradually increase, which will create both opportunities and risks for the Ethiopian private sector. However, according to analyses the benefits of stronger competition in Ethiopia outweigh the risks, precisely because competition currently is hampered by many factors and the Ethiopian economy does not provide a level playing field for the private sector. This is especially true for

Ethiopia's international trade: According to the World Bank's Doing Business indicators, which are based on surveys among private enterprises, Ethiopia is doing particularly badly in the area "Trade across Borders".

Ethiopia's WTO accession will be a catalyst for change and will strengthen the role of the private sector in the economy. This will be the main benefit – not improved market access for Ethiopian goods or cheaper import of inputs.

Finally: does the fact that these changes will be brought about only in the medium and long term justify that the private sector sits back and watches? The answer is a clear "no": The conditions of accession are defined now. Therefore, private sector must define its position, and advocate it vis-à-vis Government now. Measures to enhance competitiveness require years to bear fruit. Therefore, they must be taken now. Regardless of whether WTO accession will take place in five years, in ten years or even later – the negotiation process itself provides a clear signal to the private sector to organise itself and shape its own future. Enhanced competitiveness is vital, and WTO accession may be one of the keys.

Nevertheless, WTO accession negotiations cannot be contemplated without also considering the other negotiation forums. This is because the outcome of WTO accession negotiations will set the floor for all preferential trade agreements. The latter make sense only if liberalisation goes further than commitments vis-à-vis the WTO (i.e. tariff rates are lower, more sectors are opened, etc.). Therefore, from a defensive point of view it will make sense for Ethiopia not to make too many commitments in its WTO accession package. In this context, the timing of the negotiations becomes important. If FTA negotiations are concluded first, it can be expected that WTO members which are not parties to the signed FTA will push for similar market access conditions. It follows that WTO accession should be prioritised in terms of timing, and FTAs should be concluded thereafter.

4.2 North-South Trade versus African Regional Economic Integration

As Hess and Mutambara have shown in their companion piece to this paper, North-South and South-South trade are not alternatives but complements:

> "Regional integration developments are highly unlikely to provide the growth prospects in the short and medium term that Ethiopia needs. [...] Ethiopia needs to continue with its regional integration agenda and to strengthen it, but it is not an alternative to trade with the North. [...] The regional market can be developed for trade in goods and services in niche areas where the North may never be a significant market, such as in some medium and high technology manufactured goods (eg certain iron and steel products, furniture) and in certain services, such as accountancy services. Conversely the region is highly unlikely to ever replace the North for certain exports, such as coffee. Ethiopia needs the region but must not lose sight of the rest of the world." (Hess/Mutambara 2010: 19)

As a result of this fundamental complementarity of Ethiopia's trade with the EU and its regional trading partners the necessity of engaging into a simultaneous assessment of the two strategies is of lesser importance. Impact assessment using the conventional approach, as briefly described in section 2 above, are adequate as inputs for trade policy formulation.

4.3 Regional Trade Agreements Compared

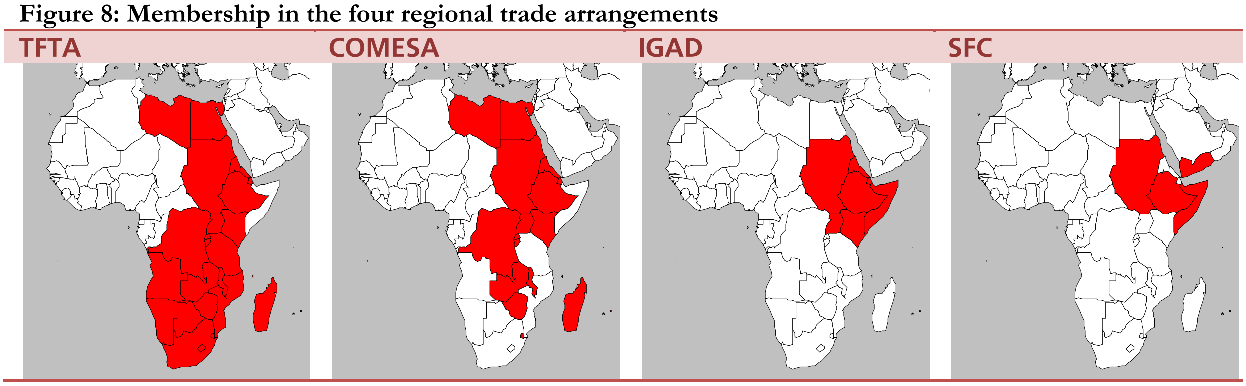
One of the problems which Ethiopia could face if it pursues all four regional trade negotiations is that of overlapping membership. Overlapping membership creates problems both for government, business and regional integration at the macro level. For the government, membership costs are higher. What is more important, there is a high likelihood that the programmes and activities of the different communities are contradictory, thereby causing inconsistencies in regional integration policies as well as creating contradictory obligations and loyalties to the different agreements. Most importantly, once FTAs develop into customs unions, overlapping membership will only be possible if all customs unions always apply the same common external tariff.

For business, overlapping membership increases costs due to more complicated and less transparent rules for cross border trade – depending on whether the trading partner is a member of one or the other FTA, conditions of trade will vary. For example, different rules of origin and customs procedures will be applied.

Finally, at the macro level duplication of efforts and conflicting regional integration policies slow down "integration, reducing the regional economic communities' effectiveness, and stretching thin limited financial resources" (UNECA/AU 2006: xvf.).

Figure 8 presents an overview of the members in the four regional integration arrangements in which Ethiopia is a member. As can be seen, the TFTA is by far the most extensive arrangement: it includes all COMESA members and all but one members (Somalia) of IGAD. The SFC's membership, by contrast is slightly different – it is not only the smallest arrangement but also the only one which has a non-African member, Yemen.

Figure 8: Membership in the four regional trade arrangements



When the importance of trade with the TFTA region and with COMESA is compared, the added value of the TFTA compared to Ethiopia's joining the COMESA FTA appears to be limited

(Table 2). The volume of Ethiopia's trade with would-be TFTA members which are not COMESA members (i.e. Angola, Botswana, Lesotho, Mozambique, Namibia, South Africa and Tanzania) over the past few years has been very limited, although in relative terms exports to South Africa have grown sharply. In 2008, 0.8% of Ethiopia's imports came from non-COMESA SADC countries (compared to 1.1% in 2001), and 0.4% of Ethiopia's exports were sold in these countries (compared to 0.04% in 2001).

Table 2: Ethiopia's trade in regional trade agreements

	2006	2007	2008	2009	2006	2007	2008	2009
	USD million				% of total trade			
Ethiopia's exports to…								
EU	342	442	561	656	33%	35%	35%	30%
TFTA	104	129	159	211	10%	10%	10%	10%
COMESA	101	125	152	205	10%	10%	10%	9%
IGAD	151	188	213	364	14%	15%	13%	17%
SFC	119	151	180	314	11%	12%	11%	14%
World	1,043	1,277	1,602	2,188	100%	100%	100%	100%
Ethiopia's imports from…								
EU	1,333	1,294	1,623	1,771	26%	22%	19%	16%
TFTA	439	259	387	407	8%	4%	4%	4%
COMESA	396	214	324	318	8%	4%	4%	3%
IGAD	326	64	201	143	6%	1%	2%	1%
SFC	99	40	178	128	2%	1%	2%	1%
World	5,207	5,809	8,680	10,916	100%	100%	100%	100%

Source: Author's calculations based on UN COMTRADE.

There are certain product groups, however, for which Ethiopia's trade with TFTA countries is relatively more important. Data by product group are currently only available for existing RECs, i.e. COMESA and SADC. Based on these data, in 2008 the most important imports of Ethiopia from COMESA in absolute terms, apart from mineral oils, are fertilizers, fats and oils, optical apparatus, essential oils, and vegetables (Table 3). The most important imports from SADC countries were vehicles, essential oils, and pharmaceutical products (Table 5).[10]

With regard to Ethiopia's exports to COMESA (Table 4), the most important product groups in absolute terms are edible vegetables (USD 71 M), coffee (USD 27 M) and live animals (USD 12 M). Edible vegetables and coffee are also Ethiopia's most important exports to SADC (Table 6). In relative terms, i.e. exports to COMESA/SADC as a share in total exports of the product group, a number of minor product groups were almost exclusively sold regionally: more than 90% each of Ethiopian fish, vegetable textile fibres, tobacco, wood, plastics, and essential oils exports were sold in COMESA. SADC countries were important destinations for miscellaneous manufactures (68%), ceramic products (48%), aircraft and parts (46%) and pharmaceutical products (32%).

In sum, given the limited importance of Ethiopia's trade with non-COMESA TFTA countries one can conclude that it would make little difference whether Ethiopia joined the COMESA

[10] Note that countries which are both members of COMESA and SADC appear twice in these data. Thus, the fact that essential oils appear among top imports from both COMESA and SADC is due to the fact that Mauritius, Ethiopia's key source for essential oils, if a member of both COMESA and SADC.

FTA or the TFTA – provided that provisions on NTB are similar. Indeed both COMESA and the TFTA foresee infrastructure development programmes, customs harmonisation, facilitation of trade in services and other non-tariff measures; however, given that it is an established institution COMESA may be better placed to implement these programmes.

When looking at Ethiopia's trade with IGAD and the SFC (Table 2 above), the huge difference between imports and exports is the first observation to be made. These two groupings uncharacteristically show a large trade surplus for Ethiopia, and also Ethiopian exports to them have increased sharply over the last four years. Unfortunately, these prima facie findings are largely explained by Ethiopia's trade with Somalia (although exports to Sudan have also increased sharply), which is a special case given the fact that its productive base has been almost completely destroyed by the war. If exports to Somalia are not taken into account, exports to IGAD and the SFC members constitute a mere 8% and 6% of total Ethiopian exports, respectively, and imports from either group of countries less than 1% of total Ethiopian imports. It can thus be concluded that the economic importance of these two organisations for Ethiopia is very limited. It is even further diminished when taking into consideration that IGAD has announced to streamline its trade regime with COMESA.

In sum, among the various regional arrangements in which Ethiopia is involved the economic importance of COMESA and the TFTA are comparable and clearly outweigh the other two arrangements. In order to minimise costs arising from overlapping membership from an economic point of view it might therefore recommendable to focus the larger two arrangements (which have the added benefit of not involving any inconsistencies, as the TFTA would partly emerge from COMESA) and conclude bilateral trade agreements with Somalia and Yemen.

5 WHITHER ETHIOPIA? RECOMMENDATIONS FOR AN OVERARCHING TRADE STRATEGY

At the beginning of this paper it was argued that trade negotiations must be relevant for addressing the key constraints for trade that a country faces. In relation to this, Ciuriak finds that a successful Ethiopian trade policy should primarily ensure:

- "A flow of competitive industrial products gaining access to export markets to augment the export palette and replace obsolescent products that lose their international market niche.
- A flow of export market entrants, including firms newly establishing their first export market presence and existing exporters diversifying the destinations for their products, augmenting the population of exporting firms and replacing firms exiting export markets.
- Physical infrastructure and logistical capacity to efficiently move goods and services to markets abroad, including transport and information & telecommunications (ICT) capabilities to expand the number of firms that can enter foreign markets.
- Institutional support to help firms surmount the manifold difficulties of entering foreign markets by reducing the up-front sunk costs of such entry, and creating as stable a trading environment as possible to minimize the frictional costs of failed export market entry" (Ciuriak 2010)

It is striking that none of these issues relates to tariff liberalisation. In consequence, negotiations of trade agreements which focus on tariff liberalisation are of secondary importance for the exporting sector. The most important export constraints are not tariff related.

Thus, a first recommendation for negotiating trade agreements is to focus not on tariff policies – as important as they may be for government revenues – but to give due attention to non-tariff issues, which is where the major benefits for the private sector may be reaped. In other words: Go for deep integration, not just tariff liberalisation. For example, given the extreme importance of several services sectors – such as, among others, financial services, (tele-)communication, information services, transport services – for the efficient functioning of the private sector (and the economy in general) the Government of Ethiopia should develop, in consultation with the private sector, a coherent and transparent services sector development strategy, which should also address the issue to what extent services sectors should be opened to foreign service providers.

Furthermore, to the extent that one of the key constraints for trade has been identified as "Ethiopia's macroeconomic policy mix and high administrative costs of trade" (Ciuriak 2010: 2), unilateral changes of these policies may well do more for expanding Ethiopia's exports than the successful conclusion of certain regional trade agreements. Only if appropriate domestic economic policies are in place, Ethiopia can benefit from trade liberalisation. If such policies are not in place, the effect of concluding trade agreements – regardless of whether they are South-South or North-South agreements – would likely be negative: "It is generally recognised that regional integration per se is not a substitute for sound national development policies. It can complement sound domestic policy but cannot compensate for weak domestic policy" (Hess/Mutambara 2010: 2).

The corresponding recommendation therefore is that unilateral, domestic policies which are conducive to private sector activity and trade need to be put in place as without them the negotiation of bi- and plurilateral trade agreements will be fruitless.

However, this is not to say that regional trade agreements and trade negotiations are irrelevant. As has been shown, they can bring important benefits to the private sector provided they are carefully and coherently negotiated. In this context, a number of suggestions can be made:

1. A *combined* cost-benefit analysis ("impact assessment") of the various FTAs should be undertaken and synergies and conflicts be studied. The isolated analyses currently being applied – which are important but have shortcomings due to their partial approach – should be complemented by these integrated analyses.
2. A coherent trade negotiations strategy should be developed which would prioritise and rank the different negotiation forums based on their importance and expected net benefit for the Ethiopian economy.
3. Institutionally, the negotiation of all trade agreements should be led by one ministry. Naturally, there should be ongoing consultations and coordination with all ministries concerned. Likewise, one public-private dialogue forum for all trade negotiations should

be established (contrary to the current structure where WTO accession and EPA negotiations have separate technical/stakeholder committees).

4. Finally, trade agreements should not be negotiated or concluded in order to pursue political goals. For the latter, other types of co-operation and agreements should be used.

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ANNEX – TABLES

Table 3: Ethiopia's imports from COMESA by product group, 2006-2008 (only product groups with import value above USD 50 thousand)

Product code	Product label	Ethiopia's imports - TOTAL (USD thousand)	Ethiopia's imports from COMESA (USD thousand)			Ethiopia's imports as % of COMESA total exports	COMESA goods in % of Ethiopia's total imports
		2008	2006	2007	2008	2008	2008
'TOTAL	All products	8,680,326	396,331	214,207	324,016	0.3%	3.7%
'27	Mineral fuels, oils, distillation products, etc	2,053,838	104,133	43,757	168,240	0.2%	8.2%
'31	Fertilizers	283,339	634	130	20,427	2.5%	7.2%
'15	Animal,vegetable fats and oils, cleavage products, etc	247,885	10,286	11,736	19,808	5.6%	8.0%
'90	Optical, photo, technical, medical, etc apparatus	91,876	1,660	2,718	12,061	8.4%	13.1%
'33	Essential oils, perfumes, cosmetics, toileteries	38,982	6,051	7,779	9,664	3.4%	24.8%
'07	Edible vegetables and certain roots and tubers	45,942	8,330	14	9,203	0.8%	20.0%
'48	Paper & paperboard, articles of pulp, paper and board	101,364	4,473	4,575	6,318	1.5%	6.2%
'39	Plastics and articles thereof	230,643	4,703	3,502	6,242	0.5%	2.7%
'72	Iron and steel	443,692	8,235	5,557	5,750	0.3%	1.3%
'84	Nuclear reactors, boilers, machinery, etc	920,338	18,081	6,771	5,674	0.8%	0.6%
'34	Soaps, lubricants, waxes, candles, modelling pastes	56,621	12,471	5,373	5,120	1.6%	9.0%
'76	Aluminium and articles thereof	58,930	4,370	6,141	4,744	0.8%	8.1%
'85	Electrical, electronic equipment	1,016,431	7,939	2,856	4,678	0.4%	0.5%
'74	Copper and articles thereof	10,052	1,213	9,812	3,834	0.1%	38.1%
'25	Salt, sulphur, earth, stone, plaster, lime and cement	166,345	7,889	68,969	3,822	0.4%	2.3%
'30	Pharmaceutical products	213,363	5,859	2,065	3,649	1.3%	1.7%
'28	Inorganic chemicals, precious metal compound, isotopes	30,367	1,394	1,649	3,402	0.5%	11.2%
'38	Miscellaneous chemical products	81,692	4,729	7,047	3,355	0.4%	4.1%
'94	Furniture, lighting, signs, prefabricated buildings	70,081	1,702	1,312	2,688	0.9%	3.8%
'24	Tobacco and manufactured tobacco substitutes	9,042	3,823	3,993	2,656	0.2%	29.4%
'12	Oil seed, oleagic fruits, grain, seed, fruit, etc, nes	79,920	4,417	67	2,615	0.4%	3.3%
'40	Rubber and articles thereof	131,897	3,077	1,875	2,261	2.2%	1.7%
'73	Articles of iron or steel	235,268	1,872	1,245	2,069	0.4%	0.9%
'09	Coffee, tea, mate and spices	88,019	27,112	291	1,422	0.1%	1.6%
'69	Ceramic products	23,090	387	420	1,086	0.3%	4.7%
'06	Live trees, plants, bulbs, roots, cut flowers etc	35,953	10,133	4,093	1,083	0.1%	3.0%
'10	Cereals	576,869	5,045	72	1,064	0.3%	0.2%
'01	Live animals	3,280	3,968	0	1,059	0.5%	32.3%
'21	Miscellaneous edible preparations	10,315	2,038	832	1,028	0.6%	10.0%
'19	Cereal, flour, starch, milk preparations and products	37,211	672	274	1,013	0.9%	2.7%
'96	Miscellaneous manufactured articles	10,222	1,612	1,501	917	2.0%	9.0%
'04	Dairy products, eggs, honey, edible animal product nes	9,366	821	162	818	0.2%	8.7%
'17	Sugars and sugar confectionery	73,574	20,977	1,326	707	0.1%	1.0%
'32	Tanning, dyeing extracts, tannins, derivs,pigments etc	27,367	350	331	688	0.8%	2.5%
'20	Vegetable, fruit, nut, etc food preparations	15,356	761	449	687	0.2%	4.5%
'87	Vehicles other than railway, tramway	525,683	71,685	859	590	0.2%	0.1%
'44	Wood and articles of wood, wood charcoal	36,147	474	534	504	0.2%	1.4%
'11	Milling products, malt, starches, inulin, wheat gluten	57,450	79	137	433	0.5%	0.8%
'49	Printed books, newspapers, pictures etc	28,752	438	394	417	0.1%	1.5%
'70	Glass and glassware	29,986	678	373	257	0.2%	0.9%
'62	Articles of apparel, accessories, not knit or crochet	64,291	358	200	248	0.0%	0.4%
'82	Tools, implements, cutlery, etc of base metal	23,087	623	152	211	0.7%	0.9%
'68	Stone, plaster, cement, asbestos, mica, etc articles	8,504	120	330	185	0.1%	2.2%
'61	Articles of apparel, accessories, knit or crochet	32,694	176	76	151	0.0%	0.5%
'67	Bird skin, feathers, artificial flowers, human hair	655	35	146	147	8.0%	22.4%
'63	Other made textile articles, sets, worn clothing etc	20,342	1,647	219	117	0.0%	0.6%
'54	Manmade filaments	70,792	376	2	101	0.2%	0.1%
'16	Meat, fish and seafood food preparations nes	1,671	142	64	97	0.0%	5.8%
'52	Cotton	3,409	68	0	86	0.0%	2.5%
'05	Products of animal origin, nes	92	57	99	79	0.2%	85.9%
'03	Fish, crustaceans, molluscs, aquatic invertebrates nes	390	34	1	68	0.0%	17.4%
'59	Impregnated, coated or laminated textile fabric	6,687	260	661	64	3.9%	1.0%
'56	Wadding, felt, nonwovens, yarns, twine, cordage, etc	2,522	15	31	51	0.3%	2.0%

Source: Calculations based on ITC/COMTRADE

Table 4: Ethiopia's exports to COMESA by product group, 2006-2008 (only product groups with export value above USD 10 thousand)

Product code	Product label	Ethiopia's exports to world (USD thousand) 2008	Ethiopia's exports to COMESA (USD thousand) 2006	2007	2008	Ethiopian exports in % of COMESA total imports 2008	Ethiopia's exports to COMESA in % of Ethiopia's total exports 2008
'TOTAL	All products	1,601,835	101,213	124,502	152,487	0.1%	9.5%
'07	Edible vegetables and certain roots and tubers	223,747	18,679	26,615	71,464	13.8%	31.9%
'09	Coffee, tea, mate and spices	574,397	14,099	17,999	26,990	5.4%	4.7%
'01	Live animals	46,425	15,876	17,195	12,179	12.8%	26.2%
'14	Vegetable plaiting materials, vegetable products nes	30,529	28,054	33,185	6,427	45.8%	21.1%
'12	Oil seed, oleagic fruits, grain, seed, fruit, etc, nes	258,643	11,728	7,382	5,869	0.7%	2.3%
'87	Vehicles other than railway, tramway	11,900	165	3,945	5,783	0.1%	48.6%
'39	Plastics and articles thereof	5,294	6	85	4,936	0.1%	93.2%
'44	Wood and articles of wood, wood charcoal	3,141	2,081	2,219	3,048	0.2%	97.0%
'72	Iron and steel	3,860	38	345	1,860	0.0%	48.2%
'08	Edible fruit, nuts, peel of citrus fruit, melons	3,115	1,601	1,923	1,778	0.7%	57.1%
'17	Sugars and sugar confectionery	15,598	100	1,559	1,677	0.1%	10.8%
'30	Pharmaceutical products	1,728	131	131	1,170	0.0%	67.7%
'52	Cotton	16,045	381	2,182	1,095	0.1%	6.8%
'64	Footwear, gaiters and the like, parts thereof	9,670	40	794	1,062	0.3%	11.0%
'33	Essential oils, perfumes, cosmetics, toileteries	1,014	417	548	918	0.2%	90.5%
'84	Nuclear reactors, boilers, machinery, etc	16,568	125	1,787	806	0.0%	4.9%
'04	Dairy products, eggs, honey, edible animal product nes	992	424	1,270	691	0.1%	69.7%
'85	Electrical, electronic equipment	8,353	58	291	645	0.0%	7.7%
'40	Rubber and articles thereof	942	12	260	479	0.0%	50.8%
'03	Fish, crustaceans, molluscs, aquatic invertebrates nes	394	282	606	394	0.1%	100.0%
'94	Furniture, lighting, signs, prefabricated buildings	2,333	57	264	315	0.0%	13.5%
'62	Articles of apparel, accessories, not knit or crochet	1,517	0	293	275	0.0%	18.1%
'22	Beverages, spirits and vinegar	848	46	97	236	0.1%	27.8%
'88	Aircraft, spacecraft, and parts thereof	1,264	0	11	233	0.0%	18.4%
'06	Live trees, plants, bulbs, roots, cut flowers etc	124,167	187	362	188	0.3%	0.2%
'11	Milling products, malt, starches, inulin, wheat gluten	293	31	119	151	0.0%	51.5%
'05	Products of animal origin, nes	720	39	81	140	0.3%	19.4%
'73	Articles of iron or steel	1,039	62	421	135	0.0%	13.0%
'13	Lac, gums, resins, vegetable saps and extracts nes	8,008	522	276	130	0.3%	1.6%
'55	Manmade staple fibres	494	0	0	129	0.0%	26.1%
'24	Tobacco and manufactured tobacco substitutes	127	0	89	127	0.0%	100.0%
'61	Articles of apparel, accessories, knit or crochet	3,339	23	10	113	0.0%	3.4%
'28	Inorganic chemicals, precious metal compound, isotopes	138	0	0	109	0.0%	79.0%
'10	Cereals	849	429	222	107	0.0%	12.6%
'90	Optical, photo, technical, medical, etc apparatus	1,419	6	7	101	0.0%	7.1%
'41	Raw hides and skins (other than furskins) and leather	90,960	333	448	94	0.3%	0.1%
'69	Ceramic products	185	0	6	92	0.0%	49.7%
'63	Other made textile articles, sets, worn clothing etc	5,897	60	123	88	0.0%	1.5%
'97	Works of art, collectors pieces and antiques	397	0	1	69	1.5%	17.4%
'82	Tools, implements, cutlery, etc of base metal	742	4	25	49	0.0%	6.6%
'96	Miscellaneous manufactured articles	340	14	3	43	0.0%	12.6%
'49	Printed books, newspapers, pictures etc	587	1	24	42	0.0%	7.2%
'76	Aluminium and articles thereof	334	15	0	37	0.0%	11.1%
'95	Toys, games, sports requisites	89	1	4	29	0.0%	32.6%
'21	Miscellaneous edible preparations	40	98	0	21	0.0%	52.5%
'23	Residues, wastes of food industry, animal fodder	668	2	313	21	0.0%	3.1%
'34	Soaps, lubricants, waxes, candles, modelling pastes	24	3	53	21	0.0%	87.5%
'38	Miscellaneous chemical products	135	0	86	20	0.0%	14.8%
'70	Glass and glassware	178	0	13	18	0.0%	10.1%
'15	Animal,vegetable fats and oils, cleavage products, etc	1,706	0	0	16	0.0%	0.9%
'46	Manufactures of plaiting material, basketwork, etc.	29	0	0	11	0.2%	37.9%

Source: Calculations based on ITC/COMTRADE

Table 5: Ethiopia's imports from SADC by product group, 2006-2008 (only product groups with import value above USD 50 thousand)

Product code	Product label	Ethiopia's imports - TOTAL (USD thousand)	Ethiopia's imports from SADC (USD thousand)			Ethiopia's imports as % of SADC total exports	SADC goods in % of Ethiopia's total imports
		2008	2006	2007	2008	2008	2008
'TOTAL	All products	8,680,326	52,165	57,719	81,030	0.0%	0.9%
'87	Vehicles other than railway, tramway	525,683	5,443	10,667	13,302	0.2%	2.5%
'33	Essential oils, perfumes, cosmetics, toileteries	38,982	6,632	8,364	10,523	2.8%	27.0%
'30	Pharmaceutical products	213,363	1,663	354	8,985	3.7%	4.2%
'84	Nuclear reactors, boilers, machinery, etc	920,338	8,819	9,585	6,986	0.1%	0.8%
'36	Explosives, pyrotechnics, matches, pyrophorics, etc	14,492	3,133	5,280	5,017	4.3%	34.6%
'27	Mineral fuels, oils, distillation products, etc	2,053,838	510	1,999	3,721	0.0%	0.2%
'48	Paper & paperboard, articles of pulp, paper and board	101,364	1,127	1,738	3,504	0.4%	3.5%
'72	Iron and steel	443,692	2,621	770	2,319	0.0%	0.5%
'39	Plastics and articles thereof	230,643	612	344	2,093	0.2%	0.9%
'12	Oil seed, oleagic fruits, grain, seed, fruit, etc, nes	79,920	90	187	1,978	0.5%	2.5%
'32	Tanning, dyeing extracts, tannins, derivs,pigments etc	27,367	947	616	1,905	0.7%	7.0%
'38	Miscellaneous chemical products	81,692	918	1,655	1,804	0.3%	2.2%
'90	Optical, photo, technical, medical, etc apparatus	91,876	1,300	675	1,786	0.4%	1.9%
'19	Cereal, flour, starch, milk preparations and products	37,211	195	145	1,688	2.0%	4.5%
'29	Organic chemicals	41,447	743	837	1,516	0.1%	3.7%
'10	Cereals	576,869	65	330	1,408	0.2%	0.2%
'47	Pulp of wood, fibrous cellulosic material, waste etc	6,035	0	2,056	1,401	0.2%	23.2%
'44	Wood and articles of wood, wood charcoal	36,147	14	1,284	1,280	0.2%	3.5%
'85	Electrical, electronic equipment	1,016,431	8,956	1,907	1,145	0.1%	0.1%
'73	Articles of iron or steel	235,268	1,776	2,256	1,083	0.1%	0.5%
'31	Fertilizers	283,339	220	893	1,026	0.2%	0.4%
'94	Furniture, lighting, signs, prefabricated buildings	70,081	242	210	1,012	0.2%	1.4%
'28	Inorganic chemicals, precious metal compound, isotopes	30,367	415	258	958	0.1%	3.2%
'22	Beverages, spirits and vinegar	8,403	563	825	558	0.0%	6.6%
'63	Other made textile articles, sets, worn clothing etc	20,342	664	387	440	0.4%	2.2%
'21	Miscellaneous edible preparations	10,315	358	352	325	0.1%	3.2%
'40	Rubber and articles thereof	131,897	344	316	323	0.1%	0.2%
'34	Soaps, lubricants, waxes, candles, modelling pastes	56,621	110	114	216	0.1%	0.4%
'49	Printed books, newspapers, pictures etc	28,752	89	93	203	0.0%	0.7%
'07	Edible vegetables and certain roots and tubers	45,942	6	18	186	0.1%	0.4%
'62	Articles of apparel, accessories, not knit or crochet	64,291	297	170	180	0.0%	0.3%
'08	Edible fruit, nuts, peel of citrus fruit, melons	3,292	263	202	173	0.0%	5.3%
'74	Copper and articles thereof	10,052	62	209	168	0.0%	1.7%
'20	Vegetable, fruit, nut, etc food preparations	15,356	132	166	149	0.0%	1.0%
'83	Miscellaneous articles of base metal	31,792	33	59	146	0.2%	0.5%
'58	Special woven or tufted fabric, lace, tapestry etc	3,048	43	12	138	0.6%	4.5%
'82	Tools, implements, cutlery, etc of base metal	23,087	236	312	137	0.1%	0.6%
'11	Milling products, malt, starches, inulin, wheat gluten	57,450	62	30	114	0.1%	0.2%
'04	Dairy products, eggs, honey, edible animal product nes	9,366	45	6	99	0.1%	1.1%
'61	Articles of apparel, accessories, knit or crochet	32,694	19	14	92	0.0%	0.3%
'09	Coffee, tea, mate and spices	88,019	17	47	86	0.0%	0.1%
'23	Residues, wastes of food industry, animal fodder	638	25	22	74	0.1%	11.6%
'70	Glass and glassware	29,986	45	275	71	0.1%	0.2%
'56	Wadding, felt, nonwovens, yarns, twine, cordage, etc	2,522	0	30	71	0.1%	2.8%
'96	Miscellaneous manufactured articles	10,222	185	8	60	0.1%	0.6%
'52	Cotton	3,409	237	73	56	0.0%	1.6%
'17	Sugars and sugar confectionery	73,574	127	71	54	0.0%	0.1%
'06	Live trees, plants, bulbs, roots, cut flowers etc	35,953	620	506	53	0.0%	0.1%

Source: Calculations based on ITC/COMTRADE

Table 6: Ethiopia's exports to SADC by product group, 2006-2008

Product code	Product label	Ethiopia's exports to world (USD thousand) 2008	Ethiopia's exports to SADC (USD thousand) 2006	2007	2008	Ethiopian exports in % of SADC total imports 2008	Ethiopia's exports to SADC in % of Ethiopia's total exports 2008
'TOTAL	All products	1,601,835	4,410	6,373	9,604	0.0%	0.6%
'07	Edible vegetables and certain roots and tubers	223,747	2,304	3,188	3,782	1.3%	1.7%
'09	Coffee, tea, mate and spices	574,397	821	791	2,133	1.1%	0.4%
'52	Cotton	16,045	344	214	649	0.1%	4.0%
'88	Aircraft, spacecraft, and parts thereof	1,264	0	34	586	0.0%	46.4%
'30	Pharmaceutical products	1,728	72	246	547	0.0%	31.7%
'06	Live trees, plants, bulbs, roots, cut flowers etc	124,167	50	48	293	1.4%	0.2%
'94	Furniture, lighting, signs, prefabricated buildings	2,333	26	160	288	0.0%	12.3%
'96	Miscellaneous manufactured articles	340	34	209	231	0.1%	67.9%
'87	Vehicles other than railway, tramway	11,900	2	99	176	0.0%	1.5%
'63	Other made textile articles, sets, worn clothing etc	5,897	44	125	157	0.0%	2.7%
'41	Raw hides and skins (other than furskins) and leather	90,960	201	74	143	0.1%	0.2%
'84	Nuclear reactors, boilers, machinery, etc	16,568	3	108	101	0.0%	0.6%
'85	Electrical, electronic equipment	8,353	4	75	100	0.0%	1.2%
'69	Ceramic products	185	0	0	89	0.0%	48.1%
'49	Printed books, newspapers, pictures etc	587	0	25	71	0.0%	12.1%
'97	Works of art, collectors pieces and antiques	397	15	36	39	0.0%	9.8%
'64	Footwear, gaiters and the like, parts thereof	9,670	2	0	34	0.0%	0.4%
'82	Tools, implements, cutlery, etc of base metal	742	0	56	29	0.0%	3.9%
'73	Articles of iron or steel	1,039	0	9	17	0.0%	1.6%
'90	Optical, photo, technical, medical, etc apparatus	1,419	0	3	17	0.0%	1.2%
'12	Oil seed, oleagic fruits, grain, seed, fruit, etc, nes	258,643	197	330	16	0.0%	0.0%
'40	Rubber and articles thereof	942	12	111	11	0.0%	1.2%
'62	Articles of apparel, accessories, not knit or crochet	1,517	0	3	11	0.0%	0.7%
'13	Lac, gums, resins, vegetable saps and extracts nes	8,008	3	0	8	0.0%	0.1%
'76	Aluminium and articles thereof	334	0	0	7	0.0%	2.1%
'25	Salt, sulphur, earth, stone, plaster, lime and cement	562	0	4	7	0.0%	1.2%
'44	Wood and articles of wood, wood charcoal	3,141	23	35	6	0.0%	0.2%
'04	Dairy products, eggs, honey, edible animal product nes	992	0	0	6	0.0%	0.6%
'61	Articles of apparel, accessories, knit or crochet	3,339	0	4	6	0.0%	0.2%
'21	Miscellaneous edible preparations	40	24	0	6	0.0%	15.0%
'70	Glass and glassware	178	0	13	5	0.0%	2.8%
'68	Stone, plaster, cement, asbestos, mica, etc articles	522	6	0	5	0.0%	1.0%
'11	Milling products, malt, starches, inulin, wheat gluten	293	0	6	4	0.0%	1.4%
'95	Toys, games, sports requisites	89	1	6	4	0.0%	4.5%
'33	Essential oils, perfumes, cosmetics, toileteries	1,014	0	0	3	0.0%	0.3%
'57	Carpets and other textile floor coverings	47	1	2	3	0.0%	6.4%
'75	Nickel and articles thereof	40	1	6	3	0.0%	7.5%
'92	Musical instruments, parts and accessories	42	0	0	2	0.0%	4.8%
'26	Ores, slag and ash	5,205	171	3	2	0.0%	0.0%
'22	Beverages, spirits and vinegar	848	0	8	1	0.0%	0.1%
'19	Cereal, flour, starch, milk preparations and products	1,527	0	4	1	0.0%	0.1%
'42	Articles of leather, animal gut, harness, travel goods	94	0	1	1	0.0%	1.1%
'83	Miscellaneous articles of base metal	18	0	0	1	0.0%	5.6%

Source: Calculations based on ITC/COMTRADE

Table 7: Import tariffs applied by TFTA countries on Ethiopian exports, by product group (HS, 2-digit level, ad valorem equivalents)

Pro	Product label	Angola	Botswana	Burundi	Comoros	Congo, DR	Djibouti	Egypt	Eritrea	Kenya	Lesotho	Libya	Madagascar	Malawi	Mauritius	Mozambique	Namibia	Rwanda	Seychelles	S.Africa	Sudan	Swaziland	Tanzania	Uganda	Zambia	Zimbabwe
	Simple (unweighted) average	**8.7%**	**8.7%**	**11.7%**	**6.7%**	**11.5%**	**20.2%**	**24.8%**	**8.1%**	**1.4%**	**8.2%**	**0.0%**	**9.9%**	**5.0%**	**0.2%**	**11.1%**	**8.9%**	**14.3%**	**17.6%**	**8.3%**	**4.2%**	**8.7%**	**14.4%**	**13.3%**	**13.4%**	**13.9%**
	Weighted average (based on ET's total exports)	**10.9%**	**9.6%**	**5.6%**	**5.5%**	**13.3%**	**18.9%**	**4.7%**	**5.5%**	**1.9%**	**8.9%**	**0.0%**	**13.8%**	**3.7%**	**0.3%**	**12.5%**	**7.3%**	**12.4%**	**49.4%**	**6.4%**	**5.0%**	**9.6%**	**19.4%**	**17.2%**	**16.9%**	**16.8%**
	Max	**28.6%**	**70.8%**	**27.0%**	**18.0%**	**20.0%**	**26.5%**	**730.9%**	**25.0%**	**8.5%**	**48.8%**	**0.0%**	**18.0%**	**18.9%**	**2.2%**	**20.0%**	**77.4%**	**27.0%**	**494.5%**	**63.6%**	**8.0%**	**70.8%**	**84.6%**	**80.2%**	**22.5%**	**86.4%**
	Min	**2.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.9%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
01	Live animals	3.0%	0.0%	4.5%	4.5%	10.3%	1.0%	0.1%	2.0%	2.5%	0.0%	0.0%	18.0%	1.7%	0.0%	5.2%	0.0%	4.5%	0.0%	0.0%	6.0%	0.0%	25.0%	22.5%	5.7%	6.0%
02	Meat and edible meat offal	10.1%	40.0%	4.5%	0.0%	10.0%	13.0%	0.0%	10.0%	2.5%	39.9%	0.0%	18.0%	3.8%	0.0%	20.0%	39.9%	13.5%	0.0%	40.0%	8.0%	40.0%	25.0%	22.5%	22.5%	16.0%
03	Fish, crustaceans, molluscs, aquatic invertebrates nes	20.0%	5.3%	4.5%	0.0%	10.2%	13.0%	0.1%	25.0%	2.5%	3.1%	0.0%	18.0%	1.0%	0.0%	18.4%	0.6%	13.4%	65.0%	4.7%	8.0%	5.3%	25.0%	22.5%	21.3%	0.0%
04	Dairy products, eggs, honey, edible animal product nes	4.6%	13.7%	4.5%	0.0%	15.9%	6.9%	4.9%	10.0%	2.5%	9.2%	0.0%	12.0%	2.2%	0.0%	12.9%	8.6%	6.9%	200.0%	16.7%	7.2%	13.7%	25.0%	22.5%	15.8%	21.7%
05	Products of animal origin, nes	9.5%	0.0%	4.5%	5.0%	10.0%	26.0%	1.8%	2.0%	1.9%	0.0%	0.0%	7.8%	5.6%	0.0%	4.3%	0.0%	4.5%	31.4%	0.0%	5.4%	0.0%	18.7%	14.9%	11.9%	5.9%
06	Live trees, plants, bulbs, roots, cut flowers etc	4.0%	6.1%	4.5%	5.0%	7.6%	11.8%	5.4%	6.0%	0.8%	16.6%	0.0%	4.9%	3.2%	0.0%	3.9%	6.2%	5.2%	97.9%	11.3%	5.0%	6.1%	7.6%	0.7%	11.3%	33.2%
07	Edible vegetables and certain roots and tubers	13.1%	10.2%	4.5%	4.5%	10.0%	1.3%	3.9%	8.4%	2.5%	8.9%	0.0%	18.0%	5.4%	0.0%	14.8%	8.4%	4.5%	0.6%	10.5%	7.0%	10.2%	25.0%	22.5%	17.1%	14.0%
08	Edible fruit, nuts, peel of citrus fruit, melons	10.5%	2.2%	4.5%	4.5%	20.0%	3.5%	13.5%	24.6%	2.5%	5.6%	0.0%	18.0%	6.1%	0.0%	19.8%	4.8%	4.9%	4.7%	6.0%	8.0%	2.2%	25.0%	22.5%	21.3%	3.5%
09	Coffee, tea, mate and spices	14.7%	12.5%	4.5%	5.0%	19.5%	26.0%	2.8%	5.2%	2.5%	8.8%	0.0%	18.0%	3.7%	0.9%	16.9%	5.5%	16.2%	112.0%	2.3%	4.2%	12.5%	25.0%	22.5%	22.5%	24.8%
10	Cereals	3.2%	0.0%	4.5%	4.2%	10.0%	0.9%	1.7%	2.0%	6.3%	0.1%	0.0%	7.1%	0.0%	0.0%	4.0%	0.1%	8.3%	0.0%	0.2%	4.1%	0.0%	56.0%	41.5%	11.1%	0.0%
11	Milling products, malt, starches, inulin, wheat gluten	6.3%	0.4%	23.9%	0.0%	10.0%	13.0%	1.8%	2.0%	5.7%	0.2%	0.0%	9.0%	1.3%	1.1%	12.8%	0.2%	13.5%	0.0%	0.9%	3.4%	0.4%	57.1%	46.7%	16.5%	0.5%
12	Oil seed, oleagic fruits, grain, seed, fruit, etc, nes	3.4%	7.4%	4.5%	4.2%	7.1%	21.2%	1.7%	2.0%	0.8%	7.8%	0.0%	7.5%	3.1%	0.0%	7.7%	8.3%	11.4%	0.0%	7.6%	4.7%	7.4%	8.3%	7.6%	10.4%	5.5%
13	Lac, gums, resins, vegetable saps and extracts nes	5.0%	3.3%	4.5%	5.0%	5.0%	26.0%	0.0%	2.0%	0.0%	8.6%	0.0%	4.5%	3.0%	0.0%	2.5%	8.0%	4.6%	0.0%	7.7%	4.2%	3.3%	0.0%	0.0%	4.2%	0.0%
14	Vegetable plaiting materials, vegetable products nes	5.0%	0.0%	4.5%	5.0%	5.0%	26.0%	1.8%	2.0%	1.0%	0.0%	0.0%	4.5%	0.0%	0.0%	2.5%	0.0%	4.5%	0.0%	0.0%	6.0%	0.0%	10.0%	9.0%	13.5%	3.0%
15	Animal,vegetable fats and oils, cleavage products, etc	7.8%	9.2%	4.5%	0.0%	16.7%	7.0%	4.2%	10.0%	1.0%	9.4%	0.0%	12.3%	3.6%	0.0%	12.5%	8.8%	21.3%	0.0%	8.7%	8.0%	9.2%	9.8%	13.3%	11.2%	23.8%
16	Meat, fish and seafood food preparations nes	15.0%	10.4%	27.0%	5.0%	14.8%	13.2%	7.9%	25.0%	2.5%	4.1%	0.0%	18.0%	5.3%	0.0%	20.0%	11.2%	27.0%	54.3%	6.0%	8.0%	10.4%	25.0%	22.5%	22.2%	12.0%
17	Sugars and sugar confectionery	4.3%	1.4%	20.8%	0.0%	20.0%	11.4%	6.3%	2.0%	8.5%	1.2%	0.0%	4.5%	5.2%	0.0%	9.8%	1.3%	26.9%	0.0%	1.1%	2.9%	1.4%	84.6%	80.2%	21.5%	1.9%
18	Cocoa and cocoa preparations	10.0%	0.0%	27.0%	5.0%	9.3%	26.0%	1.5%	10.0%	0.7%	0.0%	0.0%	8.9%	8.0%	0.0%	18.7%	0.0%	7.4%	0.0%	0.0%	8.0%	0.0%	7.1%	6.1%	19.5%	0.0%
19	Cereal, flour, starch, milk preparations and products	8.6%	24.6%	21.2%	4.9%	7.1%	11.7%	6.3%	11.7%	2.0%	32.3%	0.0%	16.4%	6.0%	0.0%	15.1%	23.2%	27.0%	12.8%	21.2%	3.4%	24.6%	20.1%	17.9%	19.4%	22.4%
20	Vegetable, fruit, nut, etc food preparations	15.0%	17.9%	27.0%	5.0%	20.0%	15.9%	17.6%	25.0%	2.5%	16.0%	0.0%	18.0%	6.3%	0.0%	19.6%	17.9%	27.0%	32.2%	14.0%	7.9%	17.9%	25.0%	22.5%	22.3%	36.0%
21	Miscellaneous edible preparations	15.3%	7.4%	19.8%	5.0%	12.9%	13.0%	643.5%	10.5%	1.6%	7.0%	0.0%	18.0%	11.3%	0.0%	15.3%	7.3%	27.0%	15.1%	8.3%	4.2%	7.4%	16.0%	14.6%	14.6%	10.3%
22	Beverages, spirits and vinegar	28.6%	13.5%	20.4%	14.3%	18.4%	26.0%	244.8%	23.0%	2.5%	7.7%	0.0%	18.0%	10.3%	1.2%	19.6%	7.9%	19.2%	494.5%	7.1%	8.0%	13.5%	25.0%	22.5%	21.9%	67.4%
23	Residues, wastes of food industry, animal fodder	6.8%	5.4%	4.5%	0.0%	7.8%	1.0%	2.8%	2.0%	1.0%	1.8%	0.0%	8.2%	0.8%	0.4%	10.6%	4.9%	11.5%	14.4%	4.9%	4.3%	5.4%	10.0%	9.0%	9.1%	4.3%
24	Tobacco and manufactured tobacco substitutes	19.2%	70.8%	27.0%	18.0%	9.7%	26.0%	54.6%	9.2%	3.1%	48.8%	0.0%	9.3%	9.7%	0.3%	10.5%	61.3%	7.5%	200.0%	63.6%	8.0%	70.8%	30.7%	22.8%	17.6%	86.4%
25	Salt, sulphur, earth, stone, plaster, lime and cement	14.6%	1.8%	5.3%	4.5%	14.5%	17.1%	2.4%	13.7%	1.1%	3.4%	0.0%	5.7%	0.2%	0.3%	7.4%	3.5%	4.4%	0.0%	3.1%	2.7%	1.8%	10.6%	22.3%	4.9%	3.7%
26	Ores, slag and ash	10.0%	0.0%	4.5%	15.0%	5.0%	26.0%	1.8%	2.0%	0.0%	0.0%	0.0%	4.5%	3.0%	0.0%	2.5%	0.0%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%	4.3%
27	Mineral fuels, oils, distillation products, etc	19.0%	0.2%	12.7%	6.2%	7.5%	23.8%	2.3%	2.0%	0.1%	0.1%	0.0%	0.1%	0.5%	0.0%	4.1%	0.6%	19.2%	0.0%	0.2%	2.0%	0.2%	0.9%	5.2%	9.9%	8.4%
28	Inorganic chemicals, precious metal compound, isotopes	2.1%	8.8%	4.5%	15.0%	5.0%	26.0%	1.8%	2.0%	0.0%	6.8%	0.0%	4.5%	8.5%	0.0%	2.4%	6.3%	13.5%	0.0%	6.7%	0.0%	8.8%	0.0%	0.0%	6.0%	0.5%
29	Organic chemicals	4.8%	0.0%	4.5%	15.0%	5.0%	26.0%	1.8%	2.0%	0.0%	0.0%	0.0%	4.5%	8.3%	0.0%	2.3%	0.0%	13.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	5.0%
30	Pharmaceutical products	3.2%	0.0%	13.5%	0.0%	18.2%	8.6%	2.2%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.2%	3.4%
31	Fertilizers	2.0%	0.0%	4.5%	0.0%	5.0%	2.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
32	Tanning, dyeing extracts, tannins, derivs,pigments etc	7.0%	0.0%	7.4%	15.0%	18.8%	21.9%	8.2%	2.0%	0.7%	0.0%	0.0%	5.1%	3.9%	0.0%	10.1%	0.0%	5.6%	0.0%	0.0%	0.0%	0.0%	6.5%	7.9%	11.0%	0.0%
33	Essential oils, perfumes, cosmetics, toileteries	12.9%	7.7%	14.8%	14.5%	14.5%	26.0%	730.9%	4.9%	1.2%	15.9%	0.0%	6.3%	4.5%	0.4%	14.8%	7.1%	14.9%	0.0%	9.9%	3.2%	7.7%	11.7%	9.7%	15.7%	32.5%
34	Soaps, lubricants, waxes, candles, modelling pastes	12.3%	20.0%	27.0%	4.5%	18.6%	26.0%	24.2%	10.0%	2.5%	20.0%	0.0%	17.6%	4.8%	0.8%	14.5%	20.0%	27.0%	0.0%	20.0%	8.0%	20.0%	25.0%	22.5%	16.3%	10.9%
35	Albuminoids, modified starches, glues, enzymes	6.5%	0.0%	9.0%	15.0%	10.0%	26.0%	0.0%	2.0%	0.0%	0.0%	0.0%	4.5%	4.6%	0.0%	11.9%	0.0%	13.5%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	11.3%	5.0%
36	Explosives, pyrotechnics, matches, pyrophorics, etc	15.0%	0.0%	0.0%	0.0%	0.0%	26.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.7%	0.0%	10.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	15.2%	0.0%
37	Photographic or cinematographic goods	4.7%	0.0%	0.0%	0.0%	0.0%	26.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.0%	0.0%	13.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	17.4%	0.0%
38	Miscellaneous chemical products	5.9%	4.8%	16.6%	2.1%	7.4%	22.8%	4.1%	2.0%	0.1%	4.0%	0.0%	1.9%	9.5%	0.0%	5.7%	5.7%	6.5%	0.0%	4.1%	2.0%	4.8%	0.6%	0.1%	6.7%	2.1%
39	Plastics and articles thereof	7.4%	8.6%	12.8%	14.9%	12.4%	25.1%	5.7%	4.5%	0.9%	5.9%	0.0%	6.6%	7.2%	0.3%	7.0%	10.4%	15.9%	0.1%	8.8%	2.4%	8.6%	8.6%	4.2%	8.2%	5.7%
40	Rubber and articles thereof	6.5%	14.6%	17.4%	4.3%	14.8%	23.7%	10.1%	7.9%	1.3%	14.3%	0.0%	17.8%	2.1%	2.2%	14.1%	20.0%	26.9%	6.5%	18.5%	3.8%	14.6%	12.7%	6.0%	17.1%	12.3%
41	Raw hides and skins (other than furskins) and leather	10.0%	4.9%	4.5%	5.0%	8.3%	26.0%	4.0%	2.0%	1.0%	4.4%	0.0%	6.9%	3.8%	0.0%	7.1%	5.0%	9.3%	0.0%	4.6%	8.0%	4.9%	10.0%	9.0%	13.5%	7.0%
42	Articles of leather, animal gut, harness, travel goods	20.0%	27.9%	27.0%	15.0%	19.9%	24.7%	24.8%	22.6%	2.5%	28.2%	0.0%	18.0%	4.1%	2.2%	19.9%	28.0%	27.0%	0.0%	28.7%	8.0%	27.9%	25.0%	22.5%	22.5%	69.4%
43	Furskins and artificial fur, manufactures thereof	20.0%	0.0%	0.0%	0.0%	0.0%	26.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.9%	0.0%	10.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	22.5%	0.0%
44	Wood and articles of wood, wood charcoal	20.2%	1.9%	11.3%	0.0%	19.6%	22.1%	5.8%	3.1%	0.8%	9.7%	0.0%	17.4%	6.1%	0.2%	7.8%	4.6%	22.4%	18.8%	5.4%	7.0%	1.9%	8.3%	22.3%	21.9%	19.8%
45	Cork and articles of cork	5.0%	0.0%	0.0%	0.0%	0.0%	26.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.5%	0.0%	7.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.5%	0.0%

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Table continued.

Pro	Product label	Angola	Botswana	Burundi	Comoros	Congo, DR	Djibouti	Egypt	Eritrea	Kenya	Lesotho	Libya	Madagascar	Malawi	Mauritius	Mozambique	Namibia	Rwanda	Seychelles	S.Africa	Sudan	Swaziland	Tanzania	Uganda	Zambia	Zimbabwe
46	Manufactures of plaiting material, basketwork, etc.	20.0%	19.8%	27.0%	4.5%	20.0%	26.0%	27.0%	25.0%	2.5%	19.9%	0.0%	18.0%	0.0%	1.3%	20.0%	19.8%	27.0%	0.0%	19.7%	6.0%	19.8%	25.0%	22.5%	22.5%	40.0%
47	Pulp of wood, fibrous cellulosic material, waste etc	5.0%	0.0%	9.0%	0.0%	5.0%	25.3%	1.8%	2.0%	0.0%	0.0%	0.0%	4.5%	3.0%	0.0%	7.5%	0.0%	4.5%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	4.5%	0.0%
48	Paper & paperboard, articles of pulp, paper and board	6.9%	11.0%	10.3%	0.0%	19.0%	25.5%	10.8%	7.0%	2.1%	7.4%	0.0%	12.5%	3.5%	0.0%	8.9%	10.5%	26.9%	0.0%	9.8%	5.6%	11.0%	20.5%	19.3%	10.4%	14.0%
49	Printed books, newspapers, pictures etc	8.7%	2.4%	14.0%	0.0%	16.3%	17.8%	4.6%	3.2%	0.4%	1.7%	0.0%	18.0%	2.2%	0.0%	4.2%	4.0%	17.3%	0.0%	1.5%	2.0%	2.4%	4.0%	3.4%	4.8%	1.9%
50	Silk	5.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	18.9%	0.0%	19.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.5%	0.0%
51	Wool, animal hair, horsehair yarn and fabric thereof	2.2%	12.9%	9.5%	15.0%	15.7%	12.8%	4.7%	2.3%	1.2%	16.2%	0.0%	4.5%	9.6%	0.0%	7.8%	8.7%	13.5%	0.0%	12.6%	0.9%	12.9%	11.6%	9.0%	13.5%	12.1%
52	Cotton	3.9%	16.3%	11.9%	15.0%	18.1%	10.0%	9.0%	10.0%	1.5%	11.4%	0.0%	17.8%	3.4%	0.0%	14.3%	19.8%	13.5%	0.0%	16.4%	3.5%	16.3%	14.8%	25.0%	12.7%	4.4%
53	Vegetable textile fibres nes, paper yarn, woven fabric	4.2%	0.0%	5.5%	15.0%	5.1%	15.0%	0.1%	2.0%	0.1%	0.0%	0.0%	4.5%	8.1%	0.0%	16.0%	0.0%	8.6%	0.0%	0.0%	6.0%	0.0%	1.2%	4.1%	12.5%	7.7%
54	Manmade filaments	3.9%	15.3%	4.5%	15.0%	12.9%	7.6%	7.1%	6.6%	1.1%	15.9%	0.0%	5.1%	4.7%	0.0%	13.4%	19.7%	13.5%	0.0%	15.9%	0.3%	15.3%	10.6%	9.6%	7.1%	1.2%
55	Manmade staple fibres	3.4%	22.0%	13.5%	15.0%	10.0%	12.8%	9.0%	10.0%	2.5%	22.0%	0.0%	18.0%	4.1%	0.0%	12.8%	22.0%	13.5%	0.0%	22.0%	6.0%	22.0%	25.0%	22.5%	8.3%	15.0%
56	Wadding, felt, nonwovens, yarns, twine, cordage, etc	3.9%	15.0%	13.5%	0.0%	20.0%	26.5%	4.5%	10.0%	2.5%	15.0%	0.0%	18.0%	5.1%	0.0%	5.7%	15.0%	27.0%	0.0%	15.0%	6.0%	15.0%	25.0%	22.5%	21.2%	9.6%
57	Carpets and other textile floor coverings	20.0%	5.0%	27.0%	0.0%	20.0%	26.0%	27.0%	25.0%	2.5%	5.0%	0.0%	18.0%	7.0%	0.0%	20.0%	5.0%	27.0%	25.0%	5.0%	8.0%	5.0%	25.0%	22.5%	22.5%	40.0%
58	Special woven or tufted fabric, lace, tapestry etc	15.8%	20.3%	27.0%	15.0%	10.0%	26.0%	9.0%	10.0%	2.5%	15.8%	0.0%	12.9%	11.4%	0.0%	20.0%	20.6%	19.3%	0.0%	17.9%	6.0%	20.3%	25.0%	22.5%	21.7%	20.0%
59	Impregnated, coated or laminated textile fabric	3.5%	7.3%	27.0%	15.0%	20.0%	26.0%	18.0%	25.0%	2.5%	7.3%	0.0%	18.0%	5.1%	0.0%	7.0%	7.3%	27.0%	0.0%	7.3%	6.0%	7.3%	25.0%	22.5%	8.2%	40.0%
60	Knitted or crocheted fabric	5.0%	22.0%	13.5%	15.0%	20.0%	26.0%	9.0%	10.0%	2.5%	22.0%	0.0%	18.0%	6.0%	0.0%	20.0%	22.0%	13.5%	0.0%	22.0%	6.0%	22.0%	25.0%	22.5%	22.5%	5.0%
61	Articles of apparel, accessories, knit or crochet	15.0%	39.9%	27.0%	15.0%	20.0%	13.0%	27.0%	25.0%	2.5%	39.9%	0.0%	18.0%	7.8%	1.3%	20.0%	39.9%	27.0%	17.7%	39.9%	8.0%	39.9%	25.0%	22.5%	22.5%	64.0%
62	Articles of apparel, accessories, not knit or crochet	15.0%	38.8%	27.0%	15.0%	20.0%	13.0%	25.5%	25.0%	2.5%	38.6%	0.0%	16.8%	5.0%	0.9%	20.0%	37.5%	27.0%	17.0%	39.0%	8.0%	38.8%	25.3%	22.7%	22.5%	63.7%
63	Other made textile articles, sets, worn clothing etc	12.0%	59.2%	27.0%	15.0%	12.6%	17.6%	26.8%	10.0%	3.7%	27.9%	0.0%	17.9%	7.2%	0.2%	19.4%	77.4%	27.0%	26.0%	32.4%	7.0%	59.2%	37.9%	38.5%	21.2%	43.2%
64	Footwear, gaiters and the like, parts thereof	9.8%	29.6%	27.0%	15.0%	20.0%	13.1%	27.0%	24.2%	2.5%	29.9%	0.0%	18.0%	5.0%	1.4%	18.6%	27.8%	27.0%	0.0%	29.9%	8.0%	29.6%	25.0%	22.5%	22.3%	71.5%
65	Headgear and parts thereof	5.0%	30.0%	27.0%	15.0%	17.8%	26.0%	27.0%	25.0%	2.5%	30.0%	0.0%	18.0%	8.0%	0.0%	15.1%	30.0%	27.0%	25.0%	30.0%	8.0%	30.0%	25.0%	22.5%	16.3%	40.0%
66	Umbrellas, walking-sticks, seat-sticks, whips, etc	5.0%	0.0%	0.0%	0.0%	0.0%	26.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.9%	0.0%	18.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	22.3%	0.0%
67	Bird skin, feathers, artificial flowers, human hair	14.2%	0.0%	0.0%	0.0%	0.0%	26.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	12.0%	0.0%	17.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	22.5%	0.0%
68	Stone, plaster, cement, asbestos, mica, etc articles	18.3%	0.0%	12.0%	15.0%	20.0%	15.4%	5.8%	3.0%	2.5%	0.0%	0.0%	9.8%	5.8%	0.0%	7.5%	0.0%	27.0%	0.0%	0.0%	4.0%	0.0%	25.0%	22.5%	9.7%	3.3%
69	Ceramic products	10.1%	19.3%	27.0%	0.1%	20.0%	15.2%	18.1%	2.1%	2.5%	19.5%	0.0%	18.0%	6.2%	0.0%	8.7%	19.6%	27.0%	2.5%	17.1%	8.0%	19.3%	25.0%	22.5%	15.1%	25.9%
70	Glass and glassware	6.4%	7.5%	9.0%	15.0%	20.0%	25.8%	9.0%	10.0%	2.5%	7.5%	0.0%	9.0%	5.4%	0.0%	8.9%	7.5%	27.0%	0.0%	7.5%	0.0%	7.5%	25.0%	22.5%	12.5%	16.0%
71	Pearls, precious stones, metals, coins, etc	28.4%	0.1%	9.4%	15.0%	17.8%	26.0%	12.1%	9.8%	2.5%	1.2%	0.0%	18.0%	3.5%	0.0%	18.5%	2.3%	26.8%	0.0%	1.1%	2.1%	0.1%	24.8%	22.3%	21.6%	1.7%
72	Iron and steel	2.1%	0.0%	9.1%	5.9%	14.1%	23.9%	4.6%	2.0%	0.4%	0.0%	0.0%	6.7%	1.3%	0.2%	5.5%	0.0%	13.5%	0.0%	0.0%	6.5%	0.0%	3.6%	12.4%	2.6%	4.2%
73	Articles of iron or steel	10.4%	6.8%	6.6%	4.5%	10.1%	22.9%	13.2%	5.5%	1.4%	7.4%	0.0%	10.0%	1.9%	0.2%	9.5%	7.4%	18.4%	0.0%	7.1%	4.3%	6.8%	14.3%	18.2%	14.3%	18.8%
74	Copper and articles thereof	2.4%	0.2%	4.6%	15.0%	10.1%	26.0%	4.6%	2.1%	0.5%	0.2%	0.0%	9.5%	0.8%	0.0%	4.4%	0.5%	14.2%	0.0%	0.4%	3.2%	0.2%	5.2%	2.0%	14.6%	1.2%
75	Nickel and articles thereof	2.1%	0.0%	0.0%	0.0%	0.0%	26.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.8%	0.0%
76	Aluminium and articles thereof	5.4%	1.4%	8.0%	15.0%	11.8%	22.2%	12.6%	6.3%	0.5%	1.2%	0.0%	6.0%	2.5%	0.0%	9.1%	2.5%	17.2%	0.0%	1.2%	1.6%	1.4%	4.8%	7.3%	12.5%	0.6%
78	Lead and articles thereof	2.3%	0.0%	9.0%	0.0%	0.0%	26.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	4.5%	0.0%	0.0%	0.0%	0.0%	6.0%	0.0%	0.0%	0.0%	6.0%	0.0%
79	Zinc and articles thereof	2.1%	0.0%	4.5%	0.0%	5.0%	26.0%	1.8%	2.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	3.5%	0.0%	0.0%	0.0%	0.0%	6.0%	0.0%	0.0%	0.0%	6.0%	0.0%
80	Tin and articles thereof	2.6%	0.0%	0.0%	0.0%	0.0%	26.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	6.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.8%	0.0%
81	Other base metals, cermets, articles thereof	2.0%	0.0%	4.5%	0.0%	10.0%	26.0%	9.0%	10.0%	0.0%	0.0%	0.0%	0.0%	8.2%	0.0%	3.9%	0.0%	0.0%	0.0%	0.0%	6.0%	0.0%	0.0%	0.0%	4.5%	0.0%
82	Tools, implements, cutlery, etc of base metal	4.1%	3.2%	4.5%	15.0%	10.0%	26.0%	3.6%	2.0%	1.0%	2.8%	0.0%	9.0%	7.1%	0.0%	9.9%	6.8%	27.0%	0.0%	2.8%	2.0%	3.2%	10.0%	9.0%	14.2%	0.0%
83	Miscellaneous articles of base metal	5.8%	12.6%	10.7%	15.0%	16.2%	26.0%	20.1%	19.3%	2.5%	10.4%	0.0%	15.5%	4.0%	0.0%	9.0%	11.0%	27.0%	48.2%	9.6%	8.0%	12.6%	25.0%	22.5%	22.1%	20.0%
84	Nuclear reactors, boilers, machinery, etc	2.5%	1.9%	9.6%	6.0%	6.5%	21.3%	2.5%	6.0%	0.3%	1.5%	0.0%	9.1%	2.8%	0.1%	6.1%	2.7%	5.5%	0.0%	1.4%	1.2%	1.9%	3.1%	1.9%	6.1%	6.6%
85	Electrical, electronic equipment	3.2%	3.1%	9.0%	15.0%	8.4%	19.6%	4.2%	10.6%	0.7%	4.5%	0.0%	11.0%	9.1%	0.5%	8.1%	3.2%	9.0%	0.0%	2.3%	2.3%	3.1%	7.2%	4.0%	13.1%	12.8%
86	Railway, tramway locomotives, rolling stock, equipment	2.0%	0.0%	0.0%	0.0%	0.0%	26.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	5.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%
87	Vehicles other than railway, tramway	5.9%	16.9%	18.1%	3.3%	9.6%	19.3%	28.0%	16.7%	1.1%	18.7%	0.0%	10.6%	2.4%	0.1%	8.9%	18.5%	18.2%	126.2%	19.8%	4.2%	16.9%	11.3%	11.0%	13.5%	26.8%
88	Aircraft, spacecraft, and parts thereof	2.0%	0.0%	9.0%	15.0%	5.0%	26.0%	4.5%	2.0%	0.0%	0.0%	0.0%	9.0%	3.0%	0.0%	0.0%	0.0%	13.8%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.7%	2.5%
89	Ships, boats and other floating structures	2.5%	0.0%	0.0%	0.0%	0.0%	26.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.4%	0.0%	6.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.1%	0.0%
90	Optical, photo, technical, medical, etc apparatus	2.1%	0.0%	11.9%	0.0%	5.5%	25.2%	2.8%	2.4%	0.0%	0.0%	0.0%	9.1%	5.7%	0.0%	6.6%	0.0%	26.5%	0.0%	0.0%	1.1%	0.0%	0.2%	0.1%	7.5%	2.4%
91	Clocks and watches and parts thereof	8.5%	0.0%	27.0%	15.0%	20.0%	26.0%	9.0%	25.0%	2.5%	0.0%	0.0%	15.4%	6.9%	0.0%	19.7%	0.0%	23.1%	0.0%	0.0%	8.0%	0.0%	25.0%	22.5%	11.6%	13.4%
92	Musical instruments, parts and accessories	8.8%	0.0%	9.0%	4.5%	19.7%	26.0%	26.5%	10.0%	1.0%	0.0%	0.0%	17.9%	12.0%	0.0%	7.5%	0.0%	26.9%	0.0%	0.0%	7.5%	0.0%	10.0%	9.0%	0.0%	12.6%
93	Arms and ammunition, parts and accessories thereof	9.4%	0.0%	0.0%	0.0%	0.0%	26.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.7%	0.0%	20.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	15.6%	0.0%
94	Furniture, lighting, signs, prefabricated buildings	16.3%	16.1%	25.3%	3.8%	19.7%	25.0%	25.7%	20.5%	2.1%	18.4%	0.0%	16.3%	4.1%	1.6%	18.4%	17.7%	21.7%	0.7%	19.1%	7.2%	16.1%	21.1%	19.8%	21.1%	36.3%
95	Toys, games, sports requisites	9.9%	5.3%	21.8%	4.5%	18.1%	26.0%	11.5%	8.9%	2.5%	2.6%	0.0%	18.0%	7.8%	0.3%	13.3%	5.3%	26.6%	0.0%	4.7%	6.0%	5.3%	25.0%	22.5%	18.2%	26.4%
96	Miscellaneous manufactured articles	5.9%	14.3%	9.6%	15.0%	10.4%	25.4%	5.5%	3.0%	1.0%	11.7%	0.0%	9.2%	8.4%	0.0%	16.5%	14.7%	26.7%	42.3%	11.4%	2.1%	14.3%	10.2%	9.3%	20.3%	18.7%
97	Works of art, collectors pieces and antiques	16.0%	0.0%	27.0%	0.0%	20.0%	26.0%	17.0%	25.0%	2.5%	0.0%	0.0%	18.0%	3.0%	0.0%	19.8%	0.0%	23.6%	0.0%	0.0%	5.0%	0.0%	25.0%	22.5%	0.1%	0.0%

Source: Calculations based on ITC Market Access Map database, www.macmap.org

Table 8: Tariffs applied by Ethiopia on imports from TFTA countries, by product group (HS, 2-digit level, ad valorem equivalents)

Pro	Product label	Angola	Botswana	Burundi	Comoros	Congo, DR	Djibouti	Egypt	Eritrea	Kenya	Lesotho	Libya	Madagascar	Malawi	Mauritius	Mozambique	Namibia	Rwanda	Seychelles	South Africa	Sudan	Swaziland	Tanzania	Uganda	Zambia	Zimbabwe
	Simple (unweighted) average	18.1%	18.1%	16.3%	16.4%	18.1%	16.4%	16.4%	16.3%	16.3%	18.1%	16.4%	16.3%	16.3%	16.3%	18.1%	18.1%	16.3%	18.1%	18.1%	16.4%	18.1%	18.1%	16.3%	16.3%	16.3%
	Weighted average (based on ET's total imports)	11.1%	11.1%	10.0%	10.0%	11.1%	10.0%	10.0%	10.0%	10.0%	11.1%	10.0%	10.0%	10.0%	10.0%	11.1%	11.1%	10.0%	11.1%	11.1%	10.0%	11.1%	11.1%	10.0%	10.0%	10.0%
	Max	35.0%	35.0%	31.5%	31.5%	35.0%	31.5%	31.5%	31.5%	31.5%	35.0%	31.5%	31.5%	31.5%	31.5%	35.0%	35.0%	31.5%	35.0%	35.0%	31.5%	35.0%	35.0%	31.5%	31.5%	31.5%
	Min	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
01	Live animals	4.9%	4.9%	4.5%	4.5%	4.9%	4.5%	4.5%	4.5%	4.5%	4.9%	4.5%	4.5%	4.5%	4.4%	4.9%	4.9%	4.5%	4.9%	4.9%	4.5%	4.9%	4.9%	4.5%	4.5%	4.5%
02	Meat and edible meat offal	30.0%	30.0%	27.0%	27.0%	30.0%	27.0%	27.0%	27.0%	27.0%	30.0%	27.0%	27.0%	27.0%	27.0%	30.0%	30.0%	27.0%	30.0%	30.0%	27.0%	30.0%	30.0%	27.0%	27.0%	27.0%
03	Fish, crustaceans, molluscs, aquatic invertebrates nes	19.9%	19.9%	17.9%	17.9%	19.9%	17.9%	17.9%	17.9%	17.9%	19.9%	17.9%	17.9%	17.9%	17.9%	19.9%	19.9%	17.9%	19.9%	19.9%	17.9%	19.9%	19.9%	17.9%	17.9%	17.9%
04	Dairy products, eggs, honey, edible animal product nes	24.0%	24.0%	21.6%	21.6%	24.0%	21.6%	21.6%	21.6%	21.6%	24.0%	21.6%	21.6%	21.6%	21.6%	24.0%	24.0%	21.6%	24.0%	24.0%	21.6%	24.0%	24.0%	21.6%	21.6%	21.6%
05	Products of animal origin, nes	10.1%	10.1%	9.1%	9.4%	10.1%	9.4%	9.4%	9.1%	9.1%	10.1%	9.4%	9.1%	9.1%	9.1%	10.1%	10.1%	9.1%	10.1%	10.1%	9.4%	10.1%	10.1%	9.1%	9.1%	9.1%
06	Live trees, plants, bulbs, roots, cut flowers etc	7.1%	7.1%	6.4%	6.3%	7.1%	6.3%	6.3%	6.4%	6.4%	7.1%	6.3%	6.4%	6.4%	6.4%	7.1%	7.1%	6.4%	7.1%	7.1%	6.3%	7.1%	7.1%	6.4%	6.4%	6.4%
07	Edible vegetables and certain roots and tubers	29.4%	29.4%	26.5%	26.5%	29.4%	26.5%	26.5%	26.5%	26.5%	29.4%	26.5%	26.5%	26.5%	26.5%	29.4%	29.4%	26.5%	29.4%	29.4%	26.5%	29.4%	29.4%	26.5%	26.5%	26.5%
08	Edible fruit, nuts, peel of citrus fruit, melons	30.0%	30.0%	27.0%	27.0%	30.0%	27.0%	27.0%	27.0%	27.0%	30.0%	27.0%	27.0%	27.0%	27.0%	30.0%	30.0%	27.0%	30.0%	30.0%	27.0%	30.0%	30.0%	27.0%	27.0%	27.0%
09	Coffee, tea, mate and spices	30.9%	30.9%	27.8%	27.8%	30.9%	27.8%	27.8%	27.8%	27.8%	30.9%	27.8%	27.8%	27.8%	27.8%	30.9%	30.9%	27.8%	30.9%	30.9%	27.8%	30.9%	30.9%	27.8%	27.8%	27.8%
10	Cereals	5.0%	5.0%	4.5%	4.5%	5.0%	4.5%	4.5%	4.5%	4.5%	5.0%	4.5%	4.5%	4.5%	4.5%	5.0%	5.0%	4.5%	5.0%	5.0%	4.5%	5.0%	5.0%	4.5%	4.5%	4.5%
11	Milling products, malt, starches, inulin, wheat gluten	13.8%	13.8%	12.4%	12.1%	13.8%	12.1%	12.1%	12.4%	12.4%	13.8%	12.1%	12.4%	12.4%	12.4%	13.8%	13.8%	12.4%	13.8%	13.8%	12.1%	13.8%	13.8%	12.4%	12.4%	12.4%
12	Oil seed, oleagic fruits, grain, seed, fruit, etc, nes	8.1%	8.1%	7.3%	7.5%	8.1%	7.5%	7.5%	7.3%	7.3%	8.1%	7.5%	7.3%	7.3%	7.3%	8.1%	8.1%	7.3%	8.1%	8.1%	7.5%	8.1%	8.1%	7.3%	7.3%	7.3%
13	Lac, gums, resins, vegetable saps and extracts nes	30.0%	30.0%	27.0%	27.0%	30.0%	27.0%	27.0%	27.0%	27.0%	30.0%	27.0%	27.0%	27.0%	27.0%	30.0%	30.0%	27.0%	30.0%	30.0%	27.0%	30.0%	30.0%	27.0%	27.0%	27.0%
14	Vegetable plaiting materials, vegetable products nes	10.0%	10.0%	9.0%	9.0%	10.0%	9.0%	9.0%	9.0%	9.0%	10.0%	9.0%	9.0%	9.0%	9.0%	10.0%	10.0%	9.0%	10.0%	10.0%	9.0%	10.0%	10.0%	9.0%	9.0%	9.0%
15	Animal,vegetable fats and oils, cleavage products, etc	18.4%	18.4%	16.5%	16.5%	18.4%	16.5%	16.5%	16.5%	16.5%	18.4%	16.5%	16.5%	16.5%	16.5%	18.4%	18.4%	16.5%	18.4%	18.4%	16.5%	18.4%	18.4%	16.5%	16.5%	16.5%
16	Meat, fish and seafood food preparations nes	30.0%	30.0%	27.0%	27.0%	30.0%	27.0%	27.0%	27.0%	27.0%	30.0%	27.0%	27.0%	27.0%	27.0%	30.0%	30.0%	27.0%	30.0%	30.0%	27.0%	30.0%	30.0%	27.0%	27.0%	27.0%
17	Sugars and sugar confectionery	10.5%	10.5%	9.4%	9.6%	10.5%	9.6%	9.6%	9.4%	9.4%	10.5%	9.6%	9.4%	9.4%	9.4%	10.5%	10.5%	9.4%	10.5%	10.5%	9.6%	10.5%	10.5%	9.4%	9.4%	9.4%
18	Cocoa and cocoa preparations	28.3%	28.3%	25.4%	25.4%	28.3%	25.4%	25.4%	25.4%	25.4%	28.3%	25.4%	25.4%	25.4%	25.4%	28.3%	28.3%	25.4%	28.3%	28.3%	25.4%	28.3%	28.3%	25.4%	25.4%	25.4%
19	Cereal, flour, starch, milk preparations and products	24.4%	24.4%	22.0%	22.0%	24.4%	22.0%	22.0%	22.0%	22.0%	24.4%	22.0%	22.0%	22.0%	22.0%	24.4%	24.4%	22.0%	24.4%	24.4%	22.0%	24.4%	24.4%	22.0%	22.0%	22.0%
20	Vegetable, fruit, nut, etc food preparations	30.0%	30.0%	27.0%	27.0%	30.0%	27.0%	27.0%	27.0%	27.0%	30.0%	27.0%	27.0%	27.0%	27.0%	30.0%	30.0%	27.0%	30.0%	30.0%	27.0%	30.0%	30.0%	27.0%	27.0%	27.0%
21	Miscellaneous edible preparations	19.1%	19.1%	17.2%	17.2%	19.1%	17.2%	17.2%	17.2%	17.2%	19.1%	17.2%	17.2%	17.2%	17.2%	19.1%	19.1%	17.2%	19.1%	19.1%	17.2%	19.1%	19.1%	17.2%	17.2%	17.2%
22	Beverages, spirits and vinegar	34.9%	34.9%	31.4%	31.4%	34.9%	31.4%	31.4%	31.4%	31.4%	34.9%	31.4%	31.4%	31.4%	31.4%	34.9%	34.9%	31.4%	34.9%	34.9%	31.4%	34.9%	34.9%	31.4%	31.4%	31.4%
23	Residues, wastes of food industry, animal fodder	9.8%	9.8%	8.8%	8.8%	9.8%	8.8%	8.8%	8.8%	8.8%	9.8%	8.8%	8.8%	8.8%	8.8%	9.8%	9.8%	8.8%	9.8%	9.8%	8.8%	9.8%	9.8%	8.8%	8.8%	8.8%
24	Tobacco and manufactured tobacco substitutes	26.9%	26.9%	24.2%	24.2%	26.9%	24.2%	24.2%	24.2%	24.2%	26.9%	24.2%	24.2%	24.2%	24.2%	26.9%	26.9%	24.2%	26.9%	26.9%	24.2%	26.9%	26.9%	24.2%	24.2%	24.2%
25	Salt, sulphur, earth, stone, plaster, lime and cement	8.6%	8.6%	7.8%	7.8%	8.6%	7.8%	7.8%	7.8%	7.8%	8.6%	7.8%	7.8%	7.8%	7.8%	8.6%	8.6%	7.8%	8.6%	8.6%	7.8%	8.6%	8.6%	7.8%	7.8%	7.8%
26	Ores, slag and ash	5.0%	5.0%	4.5%	4.5%	5.0%	4.5%	4.5%	4.5%	4.5%	5.0%	4.5%	4.5%	4.5%	4.5%	5.0%	5.0%	4.5%	5.0%	5.0%	4.5%	5.0%	5.0%	4.5%	4.5%	4.5%
27	Mineral fuels, oils, distillation products, etc	5.4%	5.4%	4.8%	4.8%	5.4%	4.8%	4.8%	4.8%	4.8%	5.4%	4.8%	4.8%	4.8%	4.8%	5.4%	5.4%	4.8%	5.4%	5.4%	4.8%	5.4%	5.4%	4.8%	4.8%	4.8%
28	Inorganic chemicals, precious metal compound, isotopes	7.3%	7.3%	6.6%	6.5%	7.3%	6.5%	6.5%	6.6%	6.6%	7.3%	6.5%	6.6%	6.6%	6.6%	7.3%	7.3%	6.6%	7.3%	7.3%	6.5%	7.3%	7.3%	6.6%	6.6%	6.6%
29	Organic chemicals	9.9%	9.9%	8.9%	8.8%	9.9%	8.8%	8.8%	8.9%	8.9%	9.9%	8.8%	8.9%	8.9%	8.7%	9.9%	9.9%	8.9%	9.9%	9.9%	8.8%	9.9%	9.9%	8.9%	8.9%	8.9%
30	Pharmaceutical products	4.5%	4.5%	4.1%	4.1%	4.5%	4.1%	4.1%	4.1%	4.1%	4.5%	4.1%	4.1%	4.1%	4.1%	4.5%	4.5%	4.1%	4.5%	4.5%	4.1%	4.5%	4.5%	4.1%	4.1%	4.1%
31	Fertilizers	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
32	Tanning, dyeing extracts, tannins, derivs,pigments etc	13.3%	13.3%	12.0%	12.0%	13.3%	12.0%	12.0%	12.0%	12.0%	13.3%	12.0%	12.0%	12.0%	12.0%	13.3%	13.3%	12.0%	13.3%	13.3%	12.0%	13.3%	13.3%	12.0%	12.0%	12.0%
33	Essential oils, perfumes, cosmetics, toileteries	26.4%	26.4%	23.8%	23.8%	26.4%	23.8%	23.8%	23.8%	23.8%	26.4%	23.8%	23.8%	23.8%	23.8%	26.4%	26.4%	23.8%	26.4%	26.4%	23.8%	26.4%	26.4%	23.8%	23.8%	23.8%
34	Soaps, lubricants, waxes, candles, modelling pastes	21.6%	21.6%	19.5%	19.5%	21.6%	19.5%	19.5%	19.5%	19.5%	21.6%	19.5%	19.5%	19.5%	19.5%	21.6%	21.6%	19.5%	21.6%	21.6%	19.5%	21.6%	21.6%	19.5%	19.5%	19.5%
35	Albuminoids, modified starches, glues, enzymes	20.0%	20.0%	18.0%	18.0%	20.0%	18.0%	18.0%	18.0%	18.0%	20.0%	18.0%	18.0%	18.0%	18.0%	20.0%	20.0%	18.0%	20.0%	20.0%	18.0%	20.0%	20.0%	18.0%	18.0%	18.0%
36	Explosives, pyrotechnics, matches, pyrophorics, etc	9.1%	9.1%	8.1%	8.1%	9.1%	8.1%	8.1%	8.1%	8.1%	9.1%	8.1%	8.1%	8.1%	8.1%	9.1%	9.1%	8.1%	9.1%	9.1%	8.1%	9.1%	9.1%	8.1%	8.1%	8.1%
37	Photographic or cinematographic goods	9.5%	9.5%	8.5%	8.5%	9.5%	8.5%	8.5%	8.5%	8.5%	9.5%	8.5%	8.5%	8.5%	8.5%	9.5%	9.5%	8.5%	9.5%	9.5%	8.5%	9.5%	9.5%	8.5%	8.5%	8.5%
38	Miscellaneous chemical products	8.1%	8.1%	7.3%	7.3%	8.1%	7.3%	7.3%	7.3%	7.3%	8.1%	7.3%	7.3%	7.3%	7.3%	8.1%	8.1%	7.3%	8.1%	8.1%	7.3%	8.1%	8.1%	7.3%	7.3%	7.3%
39	Plastics and articles thereof	12.0%	12.0%	10.8%	10.8%	12.0%	10.8%	10.8%	10.8%	10.8%	12.0%	10.8%	10.8%	10.8%	10.8%	12.0%	12.0%	10.8%	12.0%	12.0%	10.8%	12.0%	12.0%	10.8%	10.8%	10.8%
40	Rubber and articles thereof	13.9%	13.9%	12.5%	12.5%	13.9%	12.5%	12.5%	12.5%	12.5%	13.9%	12.5%	12.5%	12.5%	12.5%	13.9%	13.9%	12.5%	13.9%	13.9%	12.5%	13.9%	13.9%	12.5%	12.5%	12.5%
41	Raw hides and skins (other than furskins) and leather	2.7%	2.7%	2.4%	2.4%	2.7%	2.4%	2.4%	2.4%	2.4%	2.7%	2.4%	2.4%	2.4%	2.7%	2.7%	2.7%	2.4%	2.7%	2.7%	2.4%	2.7%	2.7%	2.4%	2.4%	2.4%
42	Articles of leather, animal gut, harness, travel goods	35.0%	35.0%	31.5%	31.5%	35.0%	31.5%	31.5%	31.5%	31.5%	35.0%	31.5%	31.5%	31.5%	31.5%	35.0%	35.0%	31.5%	35.0%	35.0%	31.5%	35.0%	35.0%	31.5%	31.5%	31.5%
43	Furskins and artificial fur, manufactures thereof	28.8%	28.8%	25.9%	28.4%	28.8%	28.4%	28.4%	25.9%	25.9%	28.8%	28.4%	25.9%	25.9%	28.2%	28.8%	28.8%	25.9%	28.8%	28.8%	28.4%	28.8%	28.8%	25.9%	25.9%	25.9%
44	Wood and articles of wood, wood charcoal	9.0%	9.0%	8.1%	8.1%	9.0%	8.1%	8.1%	8.1%	8.1%	9.0%	8.1%	8.1%	8.1%	8.1%	9.0%	9.0%	8.1%	9.0%	9.0%	8.1%	9.0%	9.0%	8.1%	8.1%	8.1%
45	Cork and articles of cork	5.3%	5.3%	4.8%	4.8%	5.3%	4.8%	4.8%	4.8%	4.8%	5.3%	4.8%	4.8%	4.8%	4.8%	5.3%	5.3%	4.8%	5.3%	5.3%	4.8%	5.3%	5.3%	4.8%	4.8%	4.8%

Continues next page.

Table continued.

Pro	Product label	Angola	Botswana	Burundi	Comoros	Congo, DR	Djibouti	Egypt	Eritrea	Kenya	Lesotho	Libya	Madagascar	Malawi	Mauritius	Mozambique	Namibia	Rwanda	Seychelles	South Africa	Sudan	Swaziland	Tanzania	Uganda	Zambia	Zimbabwe
46	Manufactures of plaiting material, basketwork, etc.	27.2%	27.2%	24.5%	24.5%	27.2%	24.5%	24.5%	24.5%	24.5%	27.2%	24.5%	24.5%	24.5%	24.5%	27.2%	27.2%	24.5%	27.2%	27.2%	24.5%	27.2%	27.2%	24.5%	24.5%	24.5%
47	Pulp of wood, fibrous cellulosic material, waste etc	1.1%	1.1%	1.0%	1.7%	1.1%	1.7%	1.7%	1.0%	1.0%	1.1%	1.7%	1.0%	1.0%	1.0%	1.1%	1.1%	1.0%	1.1%	1.1%	1.7%	1.1%	1.1%	1.0%	1.0%	1.0%
48	Paper & paperboard, articles of pulp, paper and board	13.6%	13.6%	12.2%	12.2%	13.6%	12.2%	12.2%	12.2%	12.2%	13.6%	12.2%	12.2%	12.2%	12.2%	13.6%	13.6%	12.2%	13.6%	13.6%	12.2%	13.6%	13.6%	12.2%	12.2%	12.2%
49	Printed books, newspapers, pictures etc	8.3%	8.3%	7.5%	7.5%	8.3%	7.5%	7.5%	7.5%	7.5%	8.3%	7.5%	7.5%	7.5%	7.5%	8.3%	8.3%	7.5%	8.3%	8.3%	7.5%	8.3%	8.3%	7.5%	7.5%	7.5%
50	Silk	34.8%	34.8%	31.3%	31.1%	34.8%	31.1%	31.1%	31.3%	31.3%	34.8%	31.1%	31.3%	31.3%	31.2%	34.8%	34.8%	31.3%	34.8%	34.8%	31.1%	34.8%	34.8%	31.3%	31.3%	31.3%
51	Wool, animal hair, horsehair yarn and fabric thereof	19.1%	19.1%	17.2%	17.2%	19.1%	17.2%	17.2%	17.2%	17.2%	19.1%	17.2%	17.2%	17.2%	17.2%	19.1%	19.1%	17.2%	19.1%	19.1%	17.2%	19.1%	19.1%	17.2%	17.2%	17.2%
52	Cotton	26.7%	26.7%	24.0%	24.1%	26.7%	24.1%	24.1%	24.0%	24.0%	26.7%	24.1%	24.0%	24.0%	24.1%	26.7%	26.7%	24.0%	26.7%	26.7%	24.1%	26.7%	26.7%	24.0%	24.0%	24.0%
53	Vegetable textile fibres nes, paper yarn, woven fabric	23.2%	23.2%	20.9%	20.9%	23.2%	20.9%	20.9%	20.9%	20.9%	23.2%	20.9%	20.9%	20.9%	21.0%	23.2%	23.2%	20.9%	23.2%	23.2%	20.9%	23.2%	23.2%	20.9%	20.9%	20.9%
54	Manmade filaments	29.6%	29.6%	26.7%	26.7%	29.6%	26.7%	26.7%	26.7%	26.7%	29.6%	26.7%	26.7%	26.7%	26.6%	29.6%	29.6%	26.7%	29.6%	29.6%	26.7%	29.6%	29.6%	26.7%	26.7%	26.7%
55	Manmade staple fibres	21.4%	21.4%	19.3%	19.5%	21.4%	19.5%	19.5%	19.3%	19.3%	21.4%	19.5%	19.3%	19.3%	19.3%	21.4%	21.4%	19.3%	21.4%	21.4%	19.5%	21.4%	21.4%	19.3%	19.3%	19.3%
56	Wadding, felt, nonwovens, yarns, twine, cordage, etc	32.3%	32.3%	29.1%	29.0%	32.3%	29.0%	29.0%	29.1%	29.1%	32.3%	29.0%	29.1%	29.1%	29.0%	32.3%	32.3%	29.1%	32.3%	32.3%	29.0%	32.3%	32.3%	29.1%	29.1%	29.1%
57	Carpets and other textile floor coverings	35.0%	35.0%	31.5%	31.5%	35.0%	31.5%	31.5%	31.5%	31.5%	35.0%	31.5%	31.5%	31.5%	31.5%	35.0%	35.0%	31.5%	35.0%	35.0%	31.5%	35.0%	35.0%	31.5%	31.5%	31.5%
58	Special woven or tufted fabric, lace, tapestry etc	33.2%	33.2%	29.9%	29.9%	33.2%	29.9%	29.9%	29.9%	29.9%	33.2%	29.9%	29.9%	29.9%	29.9%	33.2%	33.2%	29.9%	33.2%	33.2%	29.9%	33.2%	33.2%	29.9%	29.9%	29.9%
59	Impregnated, coated or laminated textile fabric	16.5%	16.5%	14.8%	15.1%	16.5%	15.1%	15.1%	14.8%	14.8%	16.5%	15.1%	14.8%	14.8%	14.8%	16.5%	16.5%	14.8%	16.5%	16.5%	15.1%	16.5%	16.5%	14.8%	14.8%	14.8%
60	Knitted or crocheted fabric	35.0%	35.0%	31.5%	31.5%	35.0%	31.5%	31.5%	31.5%	31.5%	35.0%	31.5%	31.5%	31.5%	31.5%	35.0%	35.0%	31.5%	35.0%	35.0%	31.5%	35.0%	35.0%	31.5%	31.5%	31.5%
61	Articles of apparel, accessories, knit or crochet	35.0%	35.0%	31.5%	31.5%	35.0%	31.5%	31.5%	31.5%	31.5%	35.0%	31.5%	31.5%	31.5%	31.5%	35.0%	35.0%	31.5%	35.0%	35.0%	31.5%	35.0%	35.0%	31.5%	31.5%	31.5%
62	Articles of apparel, accessories, not knit or crochet	35.0%	35.0%	31.5%	31.5%	35.0%	31.5%	31.5%	31.5%	31.5%	35.0%	31.5%	31.5%	31.5%	31.5%	35.0%	35.0%	31.5%	35.0%	35.0%	31.5%	35.0%	35.0%	31.5%	31.5%	31.5%
63	Other made textile articles, sets, worn clothing etc	19.4%	19.4%	17.4%	17.4%	19.4%	17.4%	17.4%	17.4%	17.4%	19.4%	17.4%	17.4%	17.4%	17.4%	19.4%	19.4%	17.4%	19.4%	19.4%	17.4%	19.4%	19.4%	17.4%	17.4%	17.4%
64	Footwear, gaiters and the like, parts thereof	34.3%	34.3%	30.9%	30.9%	34.3%	30.9%	30.9%	30.9%	30.9%	34.3%	30.9%	30.9%	30.9%	30.9%	34.3%	34.3%	30.9%	34.3%	34.3%	30.9%	34.3%	34.3%	30.9%	30.9%	30.9%
65	Headgear and parts thereof	20.7%	20.7%	18.6%	18.6%	20.7%	18.6%	18.6%	18.6%	18.6%	20.7%	18.6%	18.6%	18.6%	18.6%	20.7%	20.7%	18.6%	20.7%	20.7%	18.6%	20.7%	20.7%	18.6%	18.6%	18.6%
66	Umbrellas, walking-sticks, seat-sticks, whips, etc	33.8%	33.8%	30.4%	30.4%	33.8%	30.4%	30.4%	30.4%	30.4%	33.8%	30.4%	30.4%	30.4%	30.4%	33.8%	33.8%	30.4%	33.8%	33.8%	30.4%	33.8%	33.8%	30.4%	30.4%	30.4%
67	Bird skin, feathers, artificial flowers, human hair	26.1%	26.1%	23.5%	23.5%	26.1%	23.5%	23.5%	23.5%	23.5%	26.1%	23.5%	23.5%	23.5%	23.5%	26.1%	26.1%	23.5%	26.1%	26.1%	23.5%	26.1%	26.1%	23.5%	23.5%	23.5%
68	Stone, plaster, cement, asbestos, mica, etc articles	21.0%	21.0%	18.9%	18.8%	21.0%	18.8%	18.8%	18.9%	18.9%	21.0%	18.8%	18.9%	18.9%	18.9%	21.0%	21.0%	18.9%	21.0%	21.0%	18.8%	21.0%	21.0%	18.9%	18.9%	18.9%
69	Ceramic products	18.5%	18.5%	16.6%	16.6%	18.5%	16.6%	16.6%	16.6%	16.6%	18.5%	16.6%	16.6%	16.6%	16.6%	18.5%	18.5%	16.6%	18.5%	18.5%	16.6%	18.5%	18.5%	16.6%	16.6%	16.6%
70	Glass and glassware	19.3%	19.3%	17.4%	17.4%	19.3%	17.4%	17.4%	17.4%	17.4%	19.3%	17.4%	17.4%	17.4%	17.4%	19.3%	19.3%	17.4%	19.3%	19.3%	17.4%	19.3%	19.3%	17.4%	17.4%	17.4%
71	Pearls, precious stones, metals, coins, etc	34.9%	34.9%	31.4%	31.5%	34.9%	31.5%	31.5%	31.4%	31.4%	34.9%	31.5%	31.4%	31.4%	31.4%	34.9%	34.9%	31.4%	34.9%	34.9%	31.5%	34.9%	34.9%	31.4%	31.4%	31.4%
72	Iron and steel	8.2%	8.2%	7.4%	7.4%	8.2%	7.4%	7.4%	7.4%	7.4%	8.2%	7.4%	7.4%	7.4%	7.4%	8.2%	8.2%	7.4%	8.2%	8.2%	7.4%	8.2%	8.2%	7.4%	7.4%	7.4%
73	Articles of iron or steel	13.3%	13.3%	12.0%	12.0%	13.3%	12.0%	12.0%	12.0%	12.0%	13.3%	12.0%	12.0%	12.0%	12.0%	13.3%	13.3%	12.0%	13.3%	13.3%	12.0%	13.3%	13.3%	12.0%	12.0%	12.0%
74	Copper and articles thereof	9.9%	9.9%	8.9%	8.9%	9.9%	8.9%	8.9%	8.9%	8.9%	9.9%	8.9%	8.9%	8.9%	8.9%	9.9%	9.9%	8.9%	9.9%	9.9%	8.9%	9.9%	9.9%	8.9%	8.9%	8.9%
75	Nickel and articles thereof	5.2%	5.2%	4.7%	4.7%	5.2%	4.7%	4.7%	4.7%	4.7%	5.2%	4.7%	4.7%	4.7%	4.7%	5.2%	5.2%	4.7%	5.2%	5.2%	4.7%	5.2%	5.2%	4.7%	4.7%	4.7%
76	Aluminium and articles thereof	13.0%	13.0%	11.7%	11.7%	13.0%	11.7%	11.7%	11.7%	11.7%	13.0%	11.7%	11.7%	11.7%	11.7%	13.0%	13.0%	11.7%	13.0%	13.0%	11.7%	13.0%	13.0%	11.7%	11.7%	11.7%
78	Lead and articles thereof	6.8%	6.8%	6.1%	6.1%	6.8%	6.1%	6.1%	6.1%	6.1%	6.8%	6.1%	6.1%	6.1%	6.1%	6.8%	6.8%	6.1%	6.8%	6.8%	6.1%	6.8%	6.8%	6.1%	6.1%	6.1%
79	Zinc and articles thereof	6.2%	6.2%	5.6%	5.6%	6.2%	5.6%	5.6%	5.6%	5.6%	6.2%	5.6%	5.6%	5.6%	5.6%	6.2%	6.2%	5.6%	6.2%	6.2%	5.6%	6.2%	6.2%	5.6%	5.6%	5.6%
80	Tin and articles thereof	6.3%	6.3%	5.7%	5.7%	6.3%	5.7%	5.7%	5.7%	5.7%	6.3%	5.7%	5.7%	5.7%	5.7%	6.3%	6.3%	5.7%	6.3%	6.3%	5.7%	6.3%	6.3%	5.7%	5.7%	5.7%
81	Other base metals, cermets, articles thereof	14.5%	14.5%	13.0%	12.1%	14.5%	12.1%	12.1%	13.0%	13.0%	14.5%	12.1%	13.0%	13.0%	11.7%	14.5%	14.5%	13.0%	14.5%	14.5%	12.1%	14.5%	14.5%	13.0%	13.0%	13.0%
82	Tools, implements, cutlery, etc of base metal	21.4%	21.4%	19.3%	19.3%	21.4%	19.3%	19.3%	19.3%	19.3%	21.4%	19.3%	19.3%	19.3%	19.3%	21.4%	21.4%	19.3%	21.4%	21.4%	19.3%	21.4%	21.4%	19.3%	19.3%	19.3%
83	Miscellaneous articles of base metal	20.1%	20.1%	18.1%	18.1%	20.1%	18.1%	18.1%	18.1%	18.1%	20.1%	18.1%	18.1%	18.1%	18.1%	20.1%	20.1%	18.1%	20.1%	20.1%	18.1%	20.1%	20.1%	18.1%	18.1%	18.1%
84	Nuclear reactors, boilers, machinery, etc	7.4%	7.4%	6.6%	6.7%	7.4%	6.7%	6.7%	6.6%	6.6%	7.4%	6.7%	6.6%	6.6%	6.6%	7.4%	7.4%	6.6%	7.4%	7.4%	6.7%	7.4%	7.4%	6.6%	6.6%	6.6%
85	Electrical, electronic equipment	16.2%	16.2%	14.6%	14.6%	16.2%	14.6%	14.6%	14.6%	14.6%	16.2%	14.6%	14.6%	14.6%	14.6%	16.2%	16.2%	14.6%	16.2%	16.2%	14.6%	16.2%	16.2%	14.6%	14.6%	14.6%
86	Railway, tramway locomotives, rolling stock, equipment	1.4%	1.4%	1.3%	1.8%	1.4%	1.8%	1.8%	1.3%	1.3%	1.4%	1.8%	1.3%	1.3%	1.3%	1.4%	1.4%	1.3%	1.4%	1.4%	1.8%	1.4%	1.4%	1.3%	1.3%	1.3%
87	Vehicles other than railway, tramway	19.5%	19.5%	17.5%	17.5%	19.5%	17.5%	17.5%	17.5%	17.5%	19.5%	17.5%	17.5%	17.5%	17.5%	19.5%	19.5%	17.5%	19.5%	19.5%	17.5%	19.5%	19.5%	17.5%	17.5%	17.5%
88	Aircraft, spacecraft, and parts thereof	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
89	Ships, boats and other floating structures	7.5%	7.5%	6.7%	6.7%	7.5%	6.7%	6.7%	6.7%	6.7%	7.5%	6.7%	6.7%	6.7%	6.7%	7.5%	7.5%	6.7%	7.5%	7.5%	6.7%	7.5%	7.5%	6.7%	6.7%	6.7%
90	Optical, photo, technical, medical, etc apparatus	14.2%	14.2%	12.8%	12.7%	14.2%	12.7%	12.7%	12.8%	12.8%	14.2%	12.7%	12.8%	12.8%	12.7%	14.2%	14.2%	12.8%	14.2%	14.2%	12.7%	14.2%	14.2%	12.8%	12.8%	12.8%
91	Clocks and watches and parts thereof	22.1%	22.1%	19.9%	19.9%	22.1%	19.9%	19.9%	19.9%	19.9%	22.1%	19.9%	19.9%	19.9%	19.9%	22.1%	22.1%	19.9%	22.1%	22.1%	19.9%	22.1%	22.1%	19.9%	19.9%	19.9%
92	Musical instruments, parts and accessories	30.0%	30.0%	27.0%	27.0%	30.0%	27.0%	27.0%	27.0%	27.0%	30.0%	27.0%	27.0%	27.0%	27.0%	30.0%	30.0%	27.0%	30.0%	30.0%	27.0%	30.0%	30.0%	27.0%	27.0%	27.0%
93	Arms and ammunition, parts and accessories thereof	10.1%	10.1%	9.1%	10.2%	10.1%	10.2%	10.2%	9.1%	9.1%	10.1%	10.2%	9.1%	9.1%	9.1%	10.1%	10.1%	9.1%	10.1%	10.1%	10.2%	10.1%	10.1%	9.1%	9.1%	9.1%
94	Furniture, lighting, signs, prefabricated buildings	28.9%	28.9%	26.0%	26.0%	28.9%	26.0%	26.0%	26.0%	26.0%	28.9%	26.0%	26.0%	26.0%	26.0%	28.9%	28.9%	26.0%	28.9%	28.9%	26.0%	28.9%	28.9%	26.0%	26.0%	26.0%
95	Toys, games, sports requisites	26.8%	26.8%	24.1%	24.1%	26.8%	24.1%	24.1%	24.1%	24.1%	26.8%	24.1%	24.1%	24.1%	24.1%	26.8%	26.8%	24.1%	26.8%	26.8%	24.1%	26.8%	26.8%	24.1%	24.1%	24.1%
96	Miscellaneous manufactured articles	26.5%	26.5%	23.8%	23.8%	26.5%	23.8%	23.8%	23.8%	23.8%	26.5%	23.8%	23.8%	23.8%	23.8%	26.5%	26.5%	23.8%	26.5%	26.5%	23.8%	26.5%	26.5%	23.8%	23.8%	23.8%
97	Works of art, collectors pieces and antiques	10.0%	10.0%	9.0%	9.0%	10.0%	9.0%	9.0%	9.0%	9.0%	10.0%	9.0%	9.0%	9.0%	9.0%	10.0%	10.0%	9.0%	10.0%	10.0%	9.0%	10.0%	10.0%	9.0%	9.0%	9.0%

Source: Calculations based on ITC Market Access Map database, www.macmap.org

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