



**Western Cape
Government**

Agriculture

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A Macro-economic Report on the Africa Agenda: Western Cape Agriculture

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Executive summary

This report is the second edition of the Africa Agenda research that was initiated by the Western Cape Department of Agriculture (WCDa) in 2014. The primary objective is to provide market intelligence on the African continent and its markets in line with the National Development Plan's goal of promoting Africa regional trade and investment. It is envisioned that improved collaboration and cooperation coming from within the region will drive economic growth and development. The WCDa is determined to support this increased regional integration of which this report seeks to provide the necessary market intelligence and research to inform strategic planning and timely decision-making on the continent. Africa is a vast continent with diverse and heterogeneous countries, home to 16% of the world population. The Continent is expected to have the fastest population growth in the world towards 2100 and around 45% of its population residing in urban areas. In terms of trade, Africa imports 2.9% of the world imports and the economy grows at a rate of 4.3%.

Using statistics available on various open data platforms, several indicators were analysed to inform the WCDa's strategy in Africa with regards to agricultural trade and investments. This report consists of six parts; the first section provides an overview of the policy context that informs the objective of the study and its scope. Section 2 is about the importance of Africa looking at key macroeconomic indicators and its trade performance with South Africa and the Western Cape Province respectively. The third section is mainly a country attractiveness analysis using an index which ranks African markets for Western Cape trade and investment. In the fourth section, the focus is limited to agricultural product analysis, and this involves identifying agricultural product imported in the continent and those exported by Western Cape. The last two sections, present the results of the Relative Trade Advantage (RTA) and the Market Attractiveness Index (MAI) findings. The former shows the competitiveness of the Western Cape agricultural products in Africa, and the latter indicates the potential African markets for Western Cape exports of five selected agricultural products, namely wine of fresh grapes, apples, fruit or vegetable juice, mixed juice and milk & cream. This report then concludes with some remarks and recommendations

1. Introduction

Africa is a key strategic and prioritised market for South Africa and the Western Cape. Since 2014, the Western Cape Department of Agriculture (WCDoA) has embarked on understanding the diversity and dynamics in these markets towards increased agricultural investment and trade into the region (Partridge & Pienaar, 2013). This is in line with the objective sketched out in the National Development Plan's Chapter 7 for the country to be a leader in expanding regional African trade and investment based on improved collaboration and co-operation on the continent (NPC, 2011). Indeed, looking at the Gross Domestic Product (GDP) growth rates per continent from 2012 to 2017, Asia was the fastest-growing region with 4.5% per annum, followed closely in second by Africa with 4.3% (UNCTAD, 2019). After much structural challenges and slow growth in Africa for many decades, the continent is experiencing rapid economic transformation and opportunities for growth and job creation which is primarily underpinned by agricultural development (Traub, et al., 2014).

In terms of regional cooperation to drive this economic development, the importance of agriculture has been confirmed. Indeed, since the 2003 African Union's (AU) conference for ministers of agriculture, the political heads signed the Maputo Declaration which initiated the Comprehensive Africa Agriculture Development Programme (CAADP). Each country committed to allocate 10% of their national budget to agriculture and the implementation of CAADP (AU, 2003). As well, the process of closer cooperation and support in the New Partnership for Africa's Development (NEPAD) was requested in a bid to pursue many development issues within agriculture on the continent. Since then, the AU's Malabo Summit in 2014 reconfirmed that agriculture should remain high on the development agenda going forward and is a critical policy for African growth and poverty reduction (AU, 2014). With specific reference to trade, the Malabo declaration also reconfirmed the importance of boosting intra-African trade in agricultural commodities and services. The target listed in the declaration was to triple agricultural trade amongst African countries by the year 2025, as well as fast track, formalise trade and investment.

The commitments towards regional agricultural development and collaborations are also evident in South Africa's development plans of which the WCDoA has identified the African market as of strategic importance. After the outcome of the National and Provincial elections that took place on 8th of May 2019, government departments are in the process to develop their strategic plans, which set the priority for the next five years. Previously the

Western Cape Government's (WCG) Strategic Plan highlighted the importance of international partnerships and the positioning of the Province in Africa to promote economic development (WCG, 2015). It is within this context that the WCDoA seeks to provide an updated assessment of African markets to develop a coherent and robust policy towards increased trade and investment from the Western Cape into the continent. In broad terms, this report will follow the research approach taken Partridge and Pienaar (2014) in an attempt to assist in planning for the next cycle of policy formulation towards 2020-2024.

The structure of the report is as follows; the first section provides an overview of Africa's position relative to other regions in the world, in terms of its importance as a destination for trade and investment. This will include a discussion of major drivers that affect agricultural transformation and markets, as well as a review of some macro-economic indicators at a continental level. Next, the trade performance for both South Africa and the Western Cape will be analysed to explain the subsequent section which will specifically be a country-level analysis to inform the reader on key differences between countries on the continent. In doing so, a broad country attractiveness index is developed to rank these countries according to their relative performance, demand drivers and economic stability.

Finally, the rest of this report will exclusively focus on agricultural exports from the Western Cape and into African markets. This product analysis will detail areas with the agricultural value chain in which the Western Cape has a distinct comparative advantage and will identify potential attractive African markets for a select number of products.

2. Why is Africa Important?

After many decades of sluggish growth and development, many African economies are on a pathway of growth. Since 2007, the average annual growth of African Gross Domestic Product (GDP) has increased by 4.3% putting it in the second place only to Asia, which had a marginally higher rate of growth of 4.5% (UNCTAD, 2019). Several studies have highlighted interesting characteristics emerging on the continent such as the emergence and rise of the middle class, rapid urbanisation, shifts in food demand and the modernisation of food systems (Morokong & Partridge, 2019; UNCTAD, 2019; Tschirley, et al., 2015; Ncube & Lufumpa, 2014).

Table 1 below provides an overview of some of the main macro-economic indicators per region, highlighting vast differences between continents. Starting with the contribution to the world economy measured in 2017 US dollar terms, Africa contributed to 2.8% of the total. This is in stark contrast to other leading and developed economies in Asia (32%), followed by North America (28%) and Europe (25%) (UNCTAD, 2019). However, as noted earlier, African economies are growing at a faster pace (4.3%) compared to their relatively bigger counterparts in the developed world such as Europe (1.8) and North America (2%) between 2012 and 2017.

Table 1: Continental macro-economic Indicators

Region	Size of the World Economy (GDP 2017)	Average GDP Growth Rate (2012-2017)	Share of World Population (%)	Share of Total World Imports: 2017	Urbanisation (% Urban)
Africa	2.75	4.27	16.62	2.88	45.40
Asia	32.27	4.47	54.80	32.22	53.45
Europe	25.19	1.82	9.87	36.37	72.50
Middle East	4.32	1.83	4.86	5.45	76.45
North America	28.34	1.98	7.46	18.93	65.77
Oceania	2.06	3.38	0.54	1.56	54.80
South America	5.07	1.76	5.86	2.59	68.30

Source: UNCTAD, 2019

In terms of the demand for food and other products, Africa imported 2.9% of the total world imports. This is expected to change rapidly since 16% of the world population resides on the continent and taking into consideration that the latest population estimates. The United Nation Population Division suggests that the world population will increase to around 11.2 billion in 2100; an increase of 3.6 billion from 2017 (UN, 2017). Around 90% of this increase in world population is expected in African as a collective, making it the continent with the largest gains in the share of the world population towards the end of the next century. Also, it is expected that the share of individuals living in urban areas is set to expand rapidly from the current level of 45.4% as listed in Table 1. Apart from this challenge, or rather opportunity, that exist to meet this increase in demand for goods and services, the demographic transition underway will result in a youth bulge of new job seekers that will soon look for jobs on the continent (Jayne, et al., 2017). Thus, not only is there a need to expand production and trade in and between African countries, but it is of critical importance to employ both those struggling to currently find employment and those youth that will become of working

age and enter the job market. This is also where the agricultural sector plays an important role in economic development, and it is anticipated that this sector will need to create formal and informal employment opportunities for 10 million individuals per annum for those reaching working age.

Moving to the share of world import across continents shows that trade is concentrated in Europe (36%) and Asia (32%), followed by North America with 19% of global imports. African imports were at much lower levels, but again, in terms of growth over time quite substantial with a 41% increase in the past decade (UNCTAD, 2019). Table 1, therefore, highlights important differences between the broader African market and that of the rest of the world. Africa is a fast-growing economic region with many opportunities for investment and trade. A growing urban and rural consumer-base on the continent, coupled with income growth will lead to major changes to the role of agriculture (Morokong & Partridge, 2019).

The literature provides a useful summary of so-called “mega trends” that will drive agricultural transformation on the continent which closely aligns with the assessment done in Table 1 (Traub, et al., 2014). These are: 1) increased volatile food and energy prices, 2) improved macroeconomic management, 3) rapid urbanisation and rising per capita incomes giving rise to the African middle class, 4) rapid increase in the number of young people entering the labour market, and 5) the rise of non-farm job opportunities, whilst agriculture remains the largest employer 6) rapid concentration of farm structure as the demand for land increase; 7) widespread soil degradation in densely populated farming systems and 8) greater climate variability (Traub et al, 2014).

Finally, in this section of explaining why Africa is important, Figure 1 shows the total imports and foreign direct investment inflows (FDI) to Africa since 2001. The upward trend for both of these indicators is worth noting, even though they were some periods of declines. For instance, this most recent decline in FDI from 2015 to 2017 is not necessarily due to structural changes relating in Africa per se, but rather a global phenomenon in which FDI steadily declined in the same period. According to the World Investment Report (2019), the global FDI continued to dip in 2018 by another 13%, but African FDI increased by 11% to USD 46 billion. It also seems that trade on the continent has picked up since the slump shown in 2016 after two consecutive declining years prior. Taking a longer-term perspective then still suggests that trade and investment into the region are strongly positive.

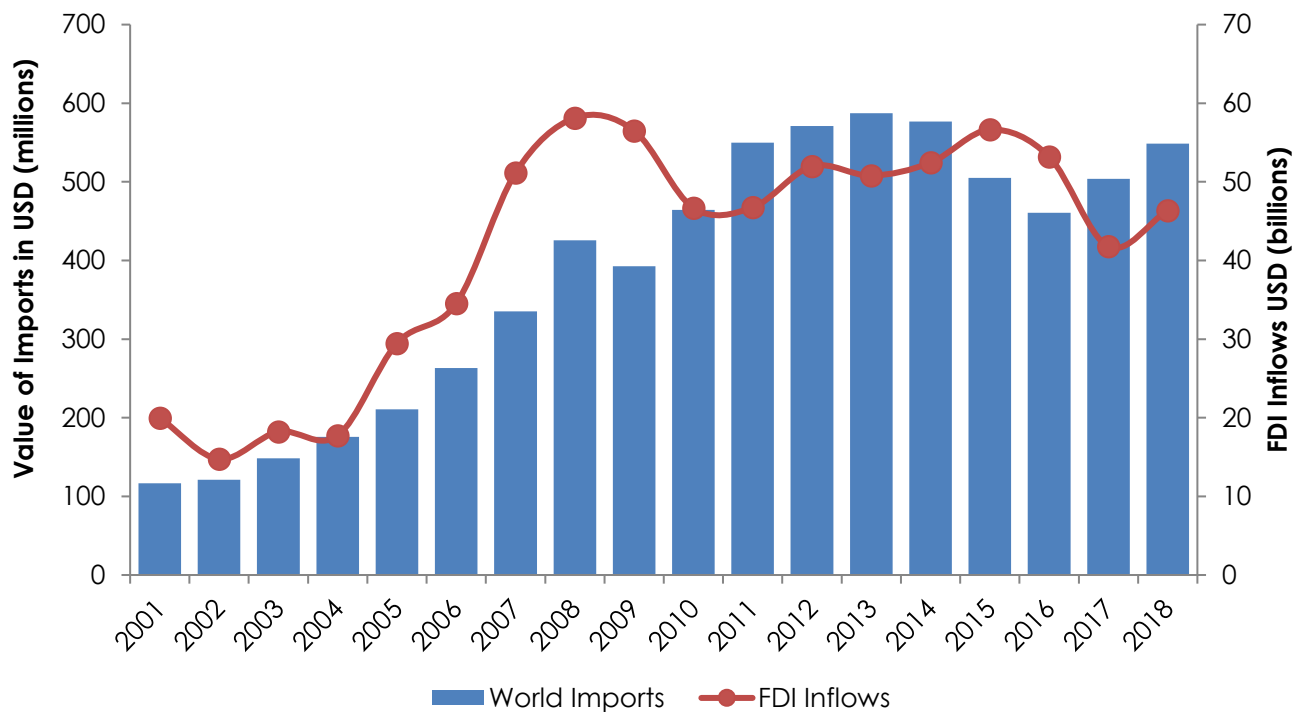


Figure 1: Total Imports and Foreign Direct Investment into Africa

Source: UNCTAD, 2019 & ITC, 2019

The Western Cape, located within South Africa and at the Southern-most tip of Africa, is inter-dependent on Africa as a trading partner. To get a sense of this trading relationship, Figure 2 shows the trade balance of Western Cape trade with Africa of all products (blue line), as well as that for only agricultural products (Quantec, 2019). Starting with the former, it is clear that the trade balance has fluctuated between being positive in some years (2000-2005, 2010-2011 & 2015-2017) and negative (2006-2010 & 2012-2014) in others. These changes were primarily driven by the Western Cape's dependence on imported fuel and oil from Africa which has fluctuated as a result of unstable world oil prices. If one excludes HS 27: mineral fuels and oil products, the overall trade balance is closely correlated to the agricultural trade balance which turned net positive and has shown an increase since 2011.

What was one of the causes of this positive trade balance? The Western Cape exports of agricultural products to Africa, since the trade balance, have also increased from 2000 to 2017. Agricultural exports from the Western Cape has therefore grown faster than Imports, especially since 2009, growing from around R174 million to R12.8 billion in 2017 (Quantec, 2019).

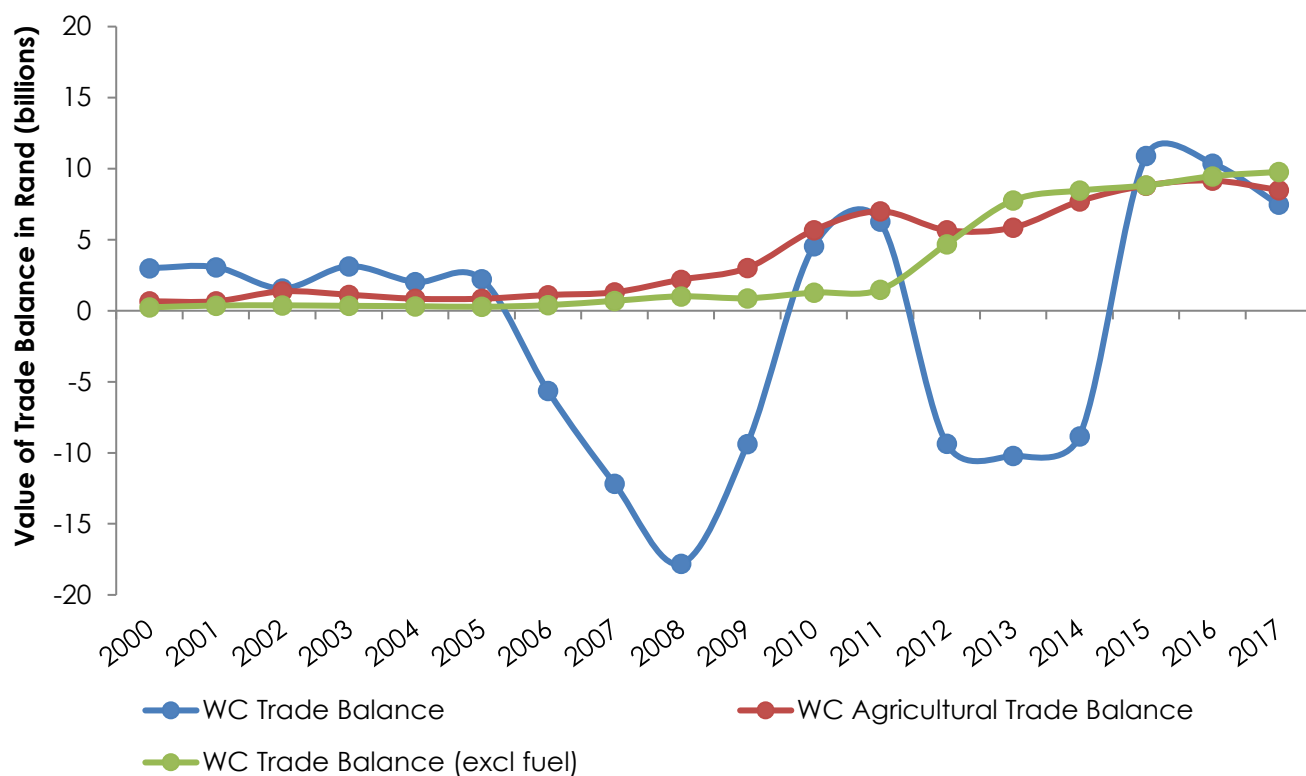


Figure 2: Western Cape trade with Africa – trade balances

Source: ITC, 2019 & Quantec, 2019

This growth of around 19% per annum suggests there are ample opportunities for the Western Cape agricultural sector to trade in the African market looking forward. Figure 3 below provides some context to show how important Africa is as an importer of Western Cape agricultural goods relative to other regions. As expected, the European market (mainly via the United Kingdom and the Netherlands) imports around 46% of the total, followed by Asia is in second place with 25% in 2017. Africa is next with around 21% with this share growth over time. Compared to the previous decade and in 2007, Western Cape agricultural exports made up a mere 7.8% which means that this share has tripled within one decade (Quantec, 2019). Thus, expanding agricultural export to Africa has also meant the Province has diversified its regional basket which strategically mitigates the risk of the reliance on a single region.

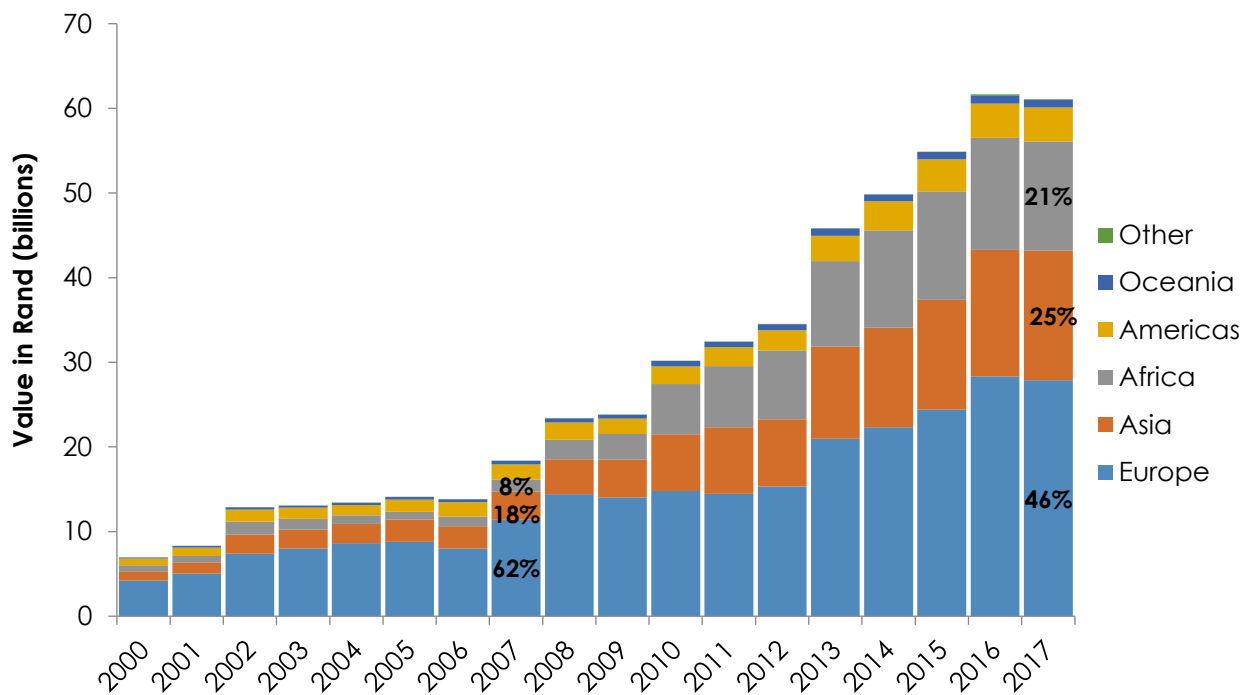


Figure 3: Western Cape agricultural exports per region, 2000 to 2017

Source: ITC, 2019

To get a better understanding of the trade and macro-economic features of these markets, the next section will proceed to analyse African countries by ranking them according to their attractiveness for investment and trade for the Western Cape.

3. Country Analysis: Western Cape trade with Africa

The African continent consists of 54 nation states, which differ in terms of climate, economy, politics, population and strength of institutions to name a few. The Western Cape also has a unique trading relationship with various African countries, depending on the distance to markets and favourable market access conditions. The recently signed Africa Continental Free Trade Agreement (AfCFTA) is an exciting new chapter for regional trade cooperation and integration on the Continent. The AfCFTA agreement is a free trade area of in which 90% of all traded goods between African countries will have zero tariffs by 2020 (UNECA, et al., 2019; UNCTAD, 2016). This will unlock new opportunities and expand existing trade between South Africa and the rest of Africa. Achieving this goal inherently requires investment in Africa's infrastructure (e.g roads and ports) to improve logistical efficiency since most of the African countries are landlocked. As part of trade liberation, this will also involve the elimination of tariffs and none tariff barriers. Figure 4 shows the major importers of Western Cape agricultural products in Africa. It reveals changes in the percentage share

of Western Cape agricultural exports products absorbed by these countries between 2012 and 2017 (Quantec, 2019). In the past five years, Namibia has consistently been the major destination for agricultural products with 26% of all agricultural products exported. In 2017, Botswana overtook Angola as the second largest importer with 14%, followed by Angola now in third with 8%. Naturally, these have been the major markets for agricultural goods because of proximity and favourable trade relations under the Southern African Customs Union (SACU) and the Southern African Development Community (SADC). Other notable important markets have traditionally been Swaziland, Zimbabwe and Mozambique each at 5%, followed by Nigeria and Lesotho each at 4%.

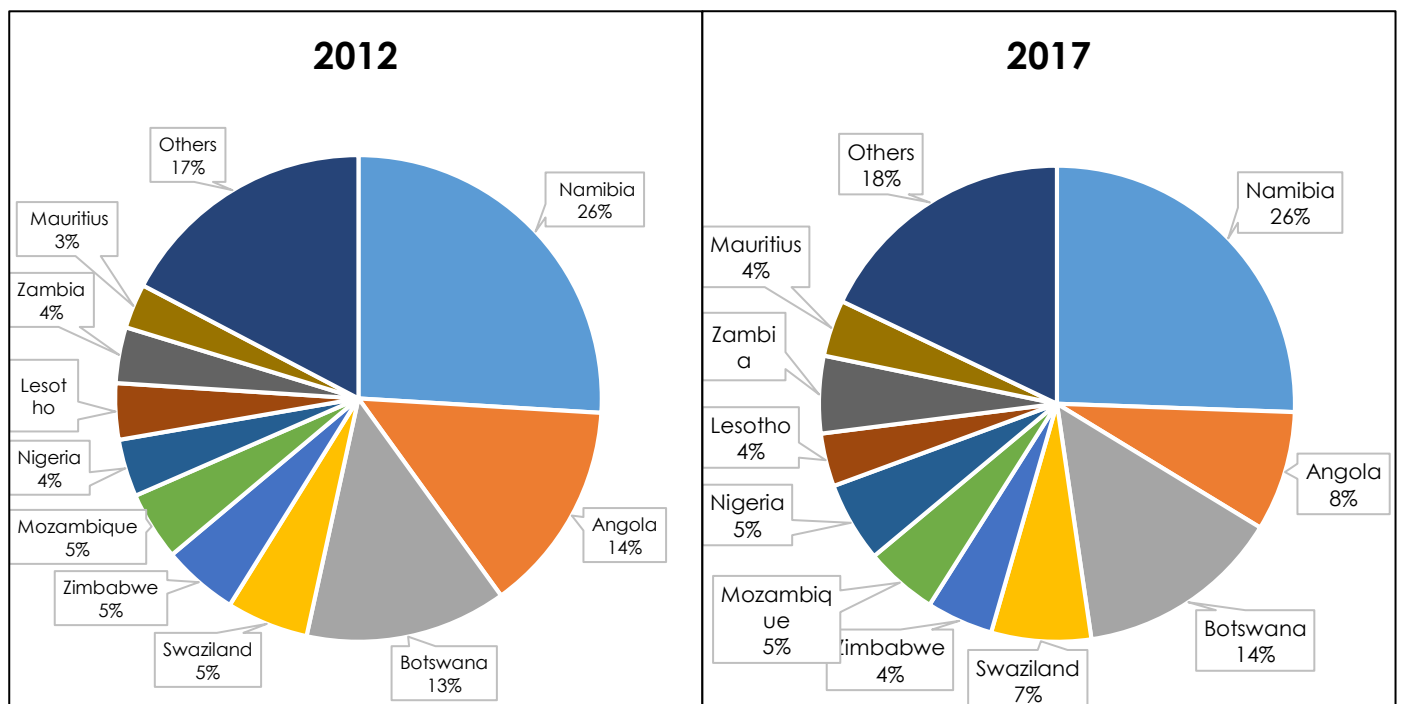


Figure 4: Main African importers of Western Cape agricultural products

Source: Quantec, 2019

In general, when one compares the differences between 2012 and 2017, there were minimal changes in the main trading partners for agricultural goods supplied by the Western Cape. It would be interesting to see how this breakdown changes in the medium-term as the AfCFTA takes effect. To get a view of the difference between countries it is essential to assess each African country within the context of several key indicators. Indicators such as GDP, population size, ease of doing business, effective institutions and human development index (HDI) are indicative of a country' economic performance, risk profile and the prevalence of the rule of law (Lee, 2016; Cavusgil, et al., 2004) and are used to compile a simple composite index measuring all African countries according to their attractiveness for trade. The use of composite indices to compare country performance is a useful tool in

policy analysis (OECD, 2005). A composite index is a quantitative or qualitative measure derived from a series of indicators that reveal the relative positions (e.g. countries, individuals) and is formed when all indicators are compiled into a single index based on an underlying model. Countries are clustered and ranked based on their index score to determine their suitability for trade and investment (Cavusgil et al, 2004).

In this study, a similar process was adopted to develop a Country Attractiveness Index (CAI) to rank potential African markets for Western Cape agricultural exports. Table 2 provides the results of the top 25 African countries, ranked according to the selected criterion for measuring relative country attractiveness¹. In short, the index provides a value between zero and 100 and higher values indicate countries with relative big and growing economies, and where the value of Western Cape agricultural export is large and growing. Also taking into consideration factors such as the ease of doing business, population growth, urbanisation, distance to markets and logistical performance are all included.

On top of the list of attractive countries for Western Cape trade and investments are Namibia, Botswana, Nigeria, Kenya, and Mauritius. These countries already import a significant share of Western Cape agricultural exports. Collectively they accounted for R6.7 billion of Western Cape agricultural exports in 2017, with an average annual growth of 12.3% in the past 5-years in value terms. Amongst the top markets, both Nigeria and Egypt are particularly large economies and the average GDP growth expected for the top 5 combined is 6.15% (UNCTAD, 2019).

The International Monetary Fund (IMF) GDP growth forecast for period 2019-2024, indicates a positive growth for Namibia at 5.1%, Botswana 6.5%, Nigeria 4.7%, Kenya 8.3% and Mauritius at 6.2%. Alongside the growing economy, some countries listed in Table 2 had particularly strong population growth estimates such as Nigeria (2.3%), Kenya (2%), Tanzania and Zambia (both 2.7%) to name a few. The ease of doing business ranking is a well-known measure developed by the World Bank Group which seeks to rank countries according to how easy it is to do business in general by using various quantitative indicators on business regulations and the protection of property rights (WorldBank, 2019B). Mauritius and Rwanda are the only African countries that made it into the top 50 nations in the world that have a conducive environment to do business (ease of doing business), whilst Morocco, Kenya, Tunisia, Botswana and Zambia ranked between 50 and 100 (Table 2). Next, the (HDI) combines measures of life expectancy, education and per capita incomes. A low HDI range is from (0.0 to 0.5), medium HDI (0.5 to 0.8), and a high HDI range is from (0.8 to 1)

¹ For a detailed list of all the countries and variables please see Annexure A

(UNDP, 2018). In Table 2, the top 5 attractive countries have medium HDI values in general and relatively high values compared to those African countries lower down the rankings. This means that, on average, people in countries such as Namibia, Botswana and Mauritius live decent and longer lives. Other indicators shown in Table 2, but also included as measures affecting the index ranking is the distance to markets and logistical performance. Worth noting here is that the Ivory Coast, Botswana, Egypt, Tanzania and Mauritius were amongst the top performing in terms of logistical performance. Whereas markets such as Botswana, Mozambique, Zimbabwe and Namibia had high scores for location proximity to the Western Cape Province, hence they scored higher values on the distance to the market index. The results given here should not be interpreted as an absolute level of attractiveness, but rather provides a framework to look at the difference between African countries and rank them according to their relative attractiveness on the selected criteria.

Table 2: Top 25 African markets according to the Country Attractiveness Index

Rank	Country	Country Attractiveness Index	GDP 2017 USD (millions)	GDP Growth Expectations 2019-2024 years (%)	Population Growth Estimates (2017-2050)	Ease of doing business (Rank)	Human Development Index	WC Agricultural Export Value 2017 (R millions)	WC Agricultural Export Growth (5 year growth)
1	Namibia	53.1	13 254	5.1	1.6	107	0.65	3 293	9.3
2	Botswana	50.8	17 407	6.5	1.2	86	0.72	1 802	10.6
3	Nigeria	49.2	375 745	4.7	2.3	146	0.53	706	17.3
4	Kenya	46.2	79 263	8.3	2.0	61	0.59	423	12.2
5	Mauritius	42.0	13 266	6.2	-0.1	20	0.79	494	15.5
6	Egypt	41.8	235 369	8.2	1.4	120	0.70	25	6.6
7	Tanzania	41.5	52 090	6.8	2.7	144	0.54	134	4.9
8	Rwanda	41.4	9 135	10.1	1.8	29	0.52	10	7.5
9	Zambia	41.3	25 868	4.8	2.7	87	0.59	677	17.5
10	Côte d'Ivoire	39.3	37 353	9.0	2.3	122	0.49	65	13.7
11	Mozambique	39.2	12 646	8.8	2.5	135	0.44	638	11.5
12	Angola	39.2	122 124	5.3	2.9	173	0.58	1 050	-1.7
13	Morocco	39.2	109 709	6.4	0.7	60	0.67	14	22.1
14	Togo	37.7	4 758	7.6	2.1	137	0.50	53	26.4
15	Somalia	37.6	7 052	5.7	2.7	190	0.35	23	155.2
16	Ghana	37.5	58 997	6.9	1.8	114	0.59	300	6.7
17	Djibouti	37.2	1 845	8.2	1.0	99	0.48	12	20.6
18	Sao Tome Principe	37.1	393	7.1	1.9	170	0.59	2	49.0
19	Uganda	37.0	25 995	8.5	2.8	127	0.52	77	15.9
20	Malawi	36.6	6 303	8.1	2.5	111	0.48	160	25.4
21	Congo, Dem. Rep.	36.5	37 642	6.8	2.7	184	0.46	139	19.6
22	Algeria	36.3	167 555	3.1	1.0	157	0.75	34	19.3
23	Ethiopia	36.0	80 561	9.3	1.8	159	0.46	45	47.1
24	Senegal	35.4	21 070	10.7	2.3	141	0.51	189	31.4
25	Gabon	35.1	15 014	6.4	1.7	169	0.70	77	13.8

Source: Own Compilation, 2019

4. Product Analysis: Agricultural Exports to Africa

The previous section focused on African countries that import agricultural products from the Western Cape and concluded with a discussion of the country attractiveness index. This section will specifically focus on the demand for agricultural products on the continent by looking African imports at the HS-2 digit level from the trade statistics. Thereafter, a more detailed assessment of the Western Cape export performance and the relative trade advantage of specific products will be discussed. Figure 4 below provides a breakdown of agricultural products that are imported by the African countries on the left and on the right shows which products are supplied by the Western Cape and into the African market. Africa's major imported products are cereals (27%), followed by animal & vegetable oils (11%), food preparations (9%), sugar (9%) and dairy (6%) in value terms (ITC, 2019). In contrast, the breakdown for the products exported from the Western Cape looks much different and reflects the Province's uniqueness in terms of the economy and climate. The Western Cape exported products to Africa reflect its distinct competitive and comparative advantage sine the basket is concentrated around the production of fruit and wine products, which make up a combined 38% of the total. Vegetable and other food preparations ranked third and fourth respectively, whilst dairy, vegetables and meats made up a much smaller proportion (Quantec, 2019).

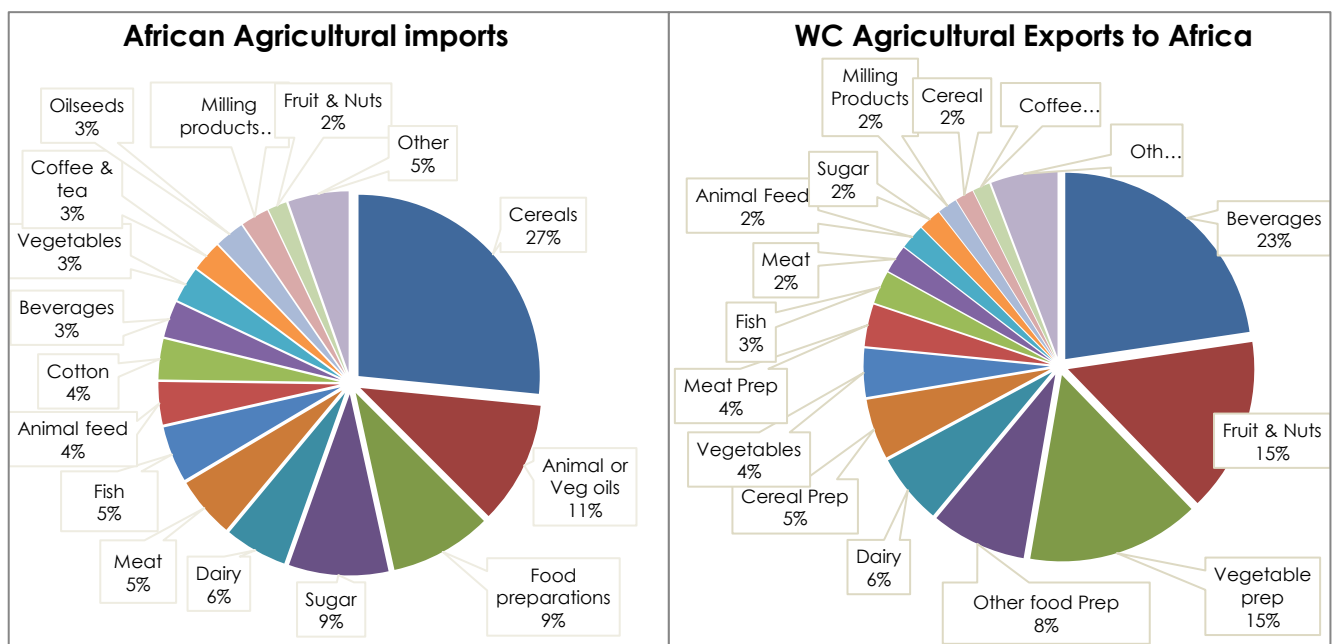


Figure 5: African agricultural imports and WC agricultural exports to Africa in 2017

Source: Quantec, 2019 & ITC, 2019

Turning the attention to a more detailed product-level assessment, Table 3 presents the top 26 agricultural products exported by Western Cape to Africa in terms of value in 2017. Apples, bottled wine and mixed fruit juice accounted for R1.2 billion, R846 million and R594 million respectively. In terms of the annual growth of these values over the past 5-years were these grew by 10.91%, 10.78% and 8.30% respectively. Scanning over Table 3 shows that the majority of the listed products had good growth since 2012 except for ciders, liqueurs and sparkling exports which registered declines. Some of the fastest growing products to take note of were food preparations, various juice segments and milk & cream fats.

Table 3: Top 25 WC agricultural products exported to Africa

Product code	Name	WC Export Value 2012 (R millions)	WC Export Value 2017 (R millions)	5 year annual Growth to Africa	RTA Value in 2017	Share of total African Imports (%)
080810	Apples	695.45	1167.03	10.91	14.05	21.98
220421	Bottled Wine	506.84	845.68	10.78	12.57	27.07
200990	Fruit Juice mixtures	398.84	594.16	8.30	8.89	28.80
220600	Ciders	576.22	522.62	-1.93	13.21	49.41
210690	Food Preparations	149.67	471.89	25.82	3.15	2.48
210390	Sauces	187.88	298.72	9.72	4.36	6.46
200989	Fruit & Veg juice	83.32	252.74	24.85	9.99	21.65
220870	Liqueurs	335.14	224.38	-7.71	10.81	31.65
040120	Milk & Cream Fat	32.18	220.47	46.95	4.27	6.52
040690	Cheese	107.31	209.60	14.33	11.15	4.02
220830	Whiskey	73.87	193.53	21.24	6.00	3.75
170490	Sugar confectionary	120.84	187.88	9.23	1.82	4.99
220300	Beer	15.51	177.52	62.82	-4.49	2.99
200919	Orange juice	34.87	168.26	37.00	9.11	25.25
160413	Prepared sardines	95.95	166.87	11.70	0.61	6.14
210320	Tomato ketchup	101.86	149.02	7.91	4.32	17.75
220820	Spirits	118.49	140.50	3.47	12.65	15.24
080610	Fresh grapes	75.17	135.43	12.50	3.66	19.88
200969	Grape juice	71.58	134.64	13.47	19.43	30.12
190590	Bread & pastries	85.60	134.36	9.44	5.56	5.35
080510	Oranges	86.61	130.19	8.49	5.47	24.95
070190	Potatoes	119.69	122.15	0.41	2.25	6.59
190410	Breakfast Cereal	72.78	110.44	8.70	4.19	6.34
220410	Sparkling wine	184.15	108.96	-9.96	11.48	9.71
080830	Pears	51.57	107.51	15.83	12.20	17.94

Source: Quantec, 2019 & ITC, 2019 & Own compilation

As part of the product analysis, Table 3 also includes both the Relative Trade Advantage (RTA) and the share of the Western Cape supplying to the African market on aggregate. The former is a measure that reveals competitiveness of Western Cape traded agricultural

products within Africa and should be interpreted as follows: competitive products have positive RTA values (+), the marginally competitive have a zero (0) and uncompetitive have negative RTA values (-) (Kleynhans, 2016). The competitiveness of agricultural products can be determined in terms of trade patterns, which indirectly show relative market costs and other non-price competitiveness factors (Volrath, 1991; Bojnec, 2012). In short, RTA values incorporate both the Relative Export Advantage (RXA), as well as the Relative Import Advantage (RMA) to derive the RTA which measures the competitiveness of products under real-world conditions. Positive values suggest that the share of the Western Cape's exports to total exports to Africa are relatively high compared to the share of African exports in the product to total African exports for all goods and does so at levels higher than is the case on the import side. Using then this methodology, it is clear that the Western Cape is highly competitive in the major products exported in Table 3. Except for beer, all products had positive RTA values and the majority had high RTA values far exceeding 1. The next section will elaborate on the RTA findings.

Finally, the last column in Table 3 shows how dominant the Western Cape in terms of the market share of supplying countries to the African continent for each product. The Western Cape supplies 22% of all apples imported to the continent, with bottled wine (27%), various juices (between 20-30%), alcoholic beverages (between 30-50%), fresh grapes (20%) and pears (18%) worth mentioning.

Since Table 3 only shows the RTA values for the top exported products from the Western Cape to Africa, Figure 5 now illustrates the results of the 2017 assessment of the Western Cape agriculture competitiveness position in Africa for products traded at harmonized standard (HS) code 4 digits. About 257 Agricultural products were traded, of that number, 64% had a competitive advantage, 13% are marginally competitive and 23% are uncompetitive products. Thus, the fact that the results are skewed toward positive and high RTA value suggest that agricultural and processing sectors in the Western Cape are well-positioned to supply African markets and some of the top competitive products include i) wine of fresh grapes, ii) ciders iii) colza and mustard oil, iv) pig fat, fresh lean meat, oats, vinegar and mushrooms & truffle (Figure 5). Most of these products have consistently been competitive as to be seen in Figure 6. In 2018, wine, ciders and oilseeds are among the highly competitive products exported by the Western Cape to Africa. A bit lower down the list, horticultural products such as potatoes, grapes, tomatoes, peppers and onions are highly competitive with RTA values that are greater than one.

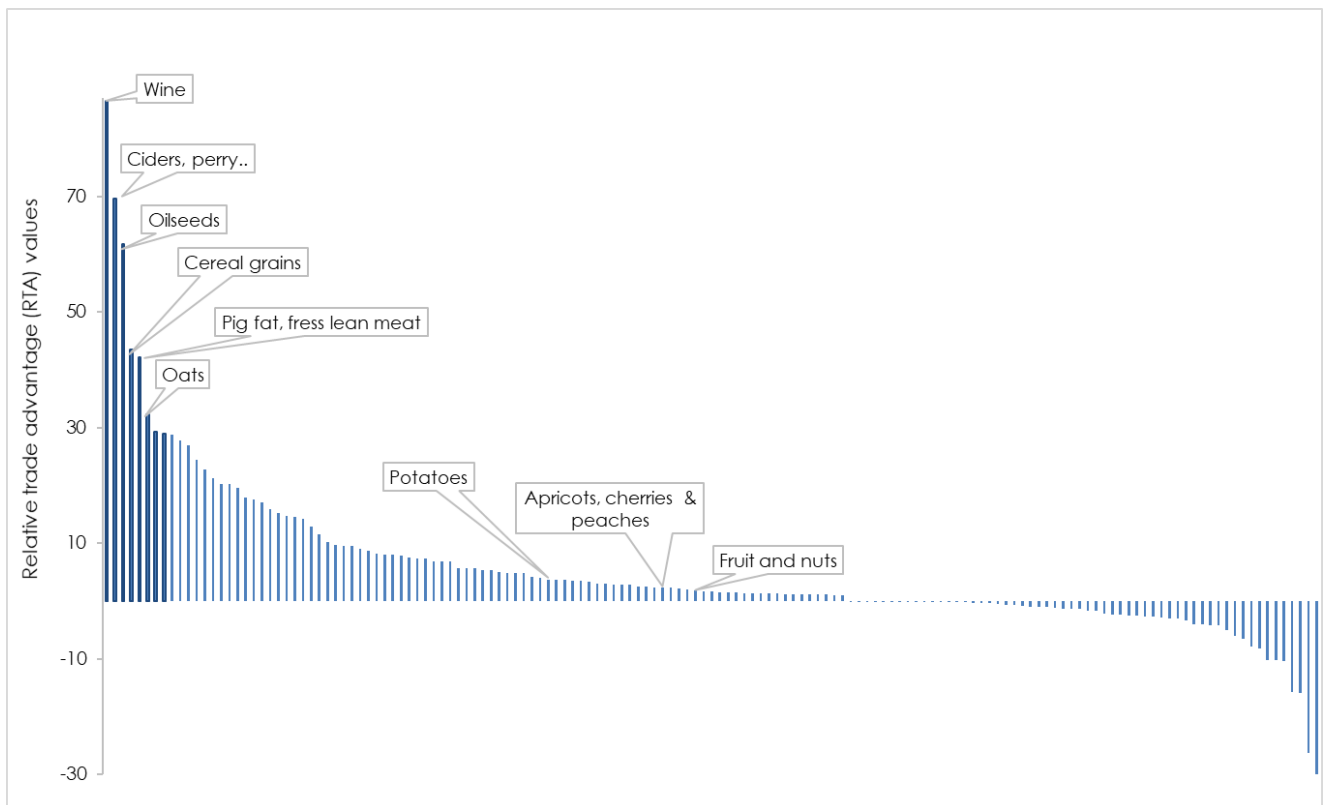


Figure 6: Relative trade advantage of Western Cape Agricultural exports to Africa

Source: ITC, 2019; Quantec, 2019

5. Market Attractiveness Index results (MAI)

Up to this point, the country and the product analysis have highlighted stable African economies and suitable products which the Western Cape has a competitive advantage. This section will build on this and proceed to identify attractive African markets for a selected number of agricultural products selected from Table 3. Using the Market Attractiveness Index (MAI) methodology as developed by the International Trade Centre, the MAI is a composite index consisting of the multiple indicators which set out to reflect the country demand and market access conditions for these products. For each, an index is calculated as shown schematically in Figure 6 below. The Country Demand Index indicators such as the GDP forecast, the imported market size and growth in value of imports and trade balance characteristics. The Market Access Index includes indicators such as relative tariffs, relative distance and the total exported products (WCDoA, 2018). Since the MAI index is based on several key indicators and aggregated in one composite indicator, the results should not be treated as an absolute measure of attractiveness but rather as relative attractiveness. Market conditions are dynamic and respond to endogenous and exogenous factors, and knowledge of such factors augments the MAI results. Detailed

market analysis of each target market is still required for investors and exporters to design a robust export strategy as the MAI results provide a range of potential attractive markets.

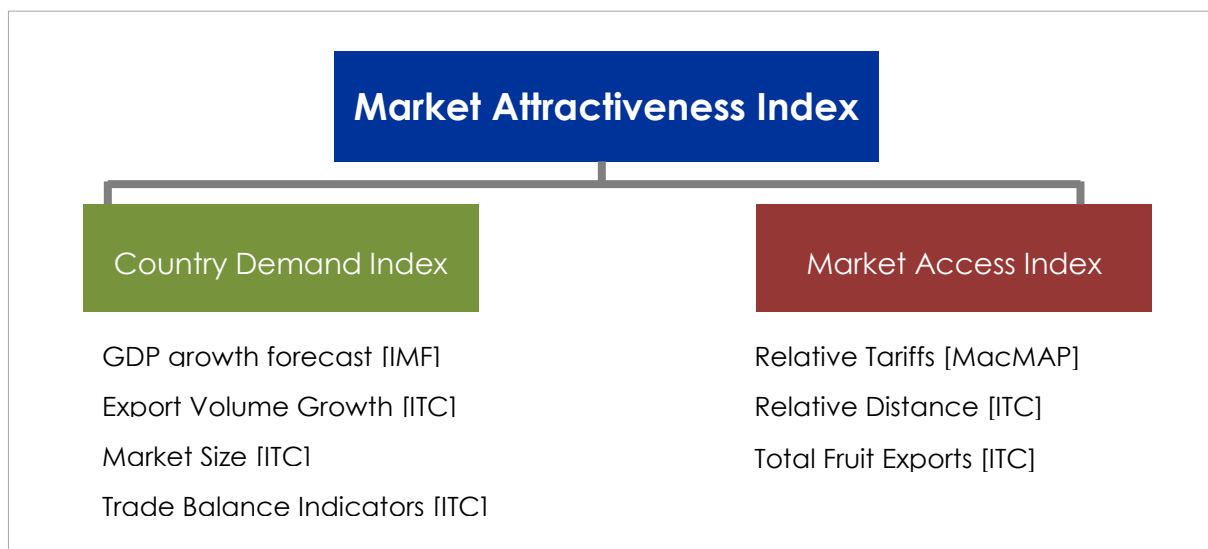


Figure 7: The Market Attractiveness Framework and Indicators

Source: Own Compilation

Products selected for the MAI are 1) wine of fresh grapes, 2) apples, 3) juice of fruit or vegetable, 4) Milk and cream, and 5) mixture of Juices. These products are among the top 25 Western Cape exported products to Africa, as previously discussed in Table 3. In the following discussion, Figure (7 to 11) indicates attractive African markets for Western Cape exports of selected products. For each product, a summary of the results will be discussed to ease interpretation of the MAI rankings, supplemented with the actual annual 4-year growth in the value of Western Cape exports of the product. Thus, all of the dots located above the dotted line, indicate markets where the Western Cape has expanded its value of exports in the past 4-years.

5.1 Wine of fresh grapes (HS: 220421)

The results for bottled wine made from grapes are shown in Figure 7 below and gives the top 10 most attractive markets. Namibia, Botswana and Lesotho had the highest MAI values, followed by Mauritius, Zimbabwe and Eswatini. Namibia is an especially big market for imports of bottled wine and imports with a value of R510 million in 2017 (ITC, 2019). South Africa also faced a zero tariff as is the case with 9 of the top ten attractive markets. Only Angola placed a tariff of 30% on Western Cape bottled wine which meant that, even though it is a big and growing market that is near the Western Cape, made it to the 9th position for attractive markets. Other notable attractive markets for bottled wine were that of Mozambique and Tanzania. Scanning Figure 7 one would see that the Western Cape

had in particular high growth (>10%) in countries such as Namibia, Botswana, Lesotho, Zimbabwe, Mozambique, Tanzania and Angola. These results suggest that the MAI finding reflects the market in which the Western Cape is already expanding its export base.

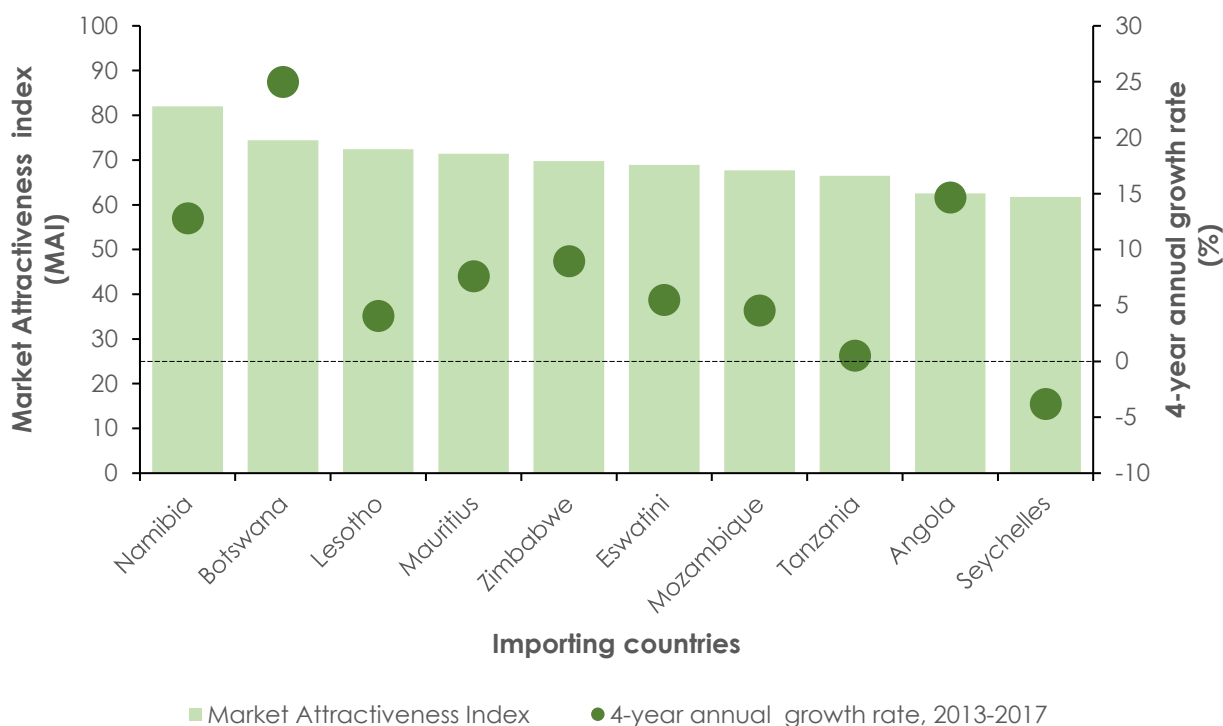


Figure 8: MAI results for bottled wine from grapes (HS: 220421) in Africa.

Source: Own compilation based Quantec, 2019 data

5.2 Fresh apples (HS 080810)

Fresh apple exports to Africa remains an extremely important market to the Western Cape. Indeed, around 36% of all apples exported by the Western Cape go to African countries (Quantec, 2019). Looking then at the top ten attractive markets, Mozambique, Tanzania and Eswatini made the top three, followed by Zimbabwe, Zambia and Botswana. Of these, Zambia was the fastest-growing destination for the Western Cape, increasing from R2.6 million in 2013 to more than R7.3 million in 2017. Even though this is from a small base compare to other African countries such as Nigeria (R288 million), Kenya (R164 million) and Senegal (R128 million), there is ample opportunities to grow export to smaller markets such as Eswatini (6%), Malawi (15%) and Lesotho (15%) amongst others. The largest market for Western Cape export in the top ten was Botswana which also had good growth.

The reason that some of the largest and growing importers of apples did not make it onto the list was because of tariffs. For instance, Western Cape exports face a tariff of 40% to Egypt, 25% to Kenya and 20% to Nigeria. The attractiveness of these markets is set to change

dramatically if the AfCFTA allows for zero tariffs for apples traded on the continent. It is expected that this will give provide an opportunity for increased exports due to more favourable market access condition looking forward.

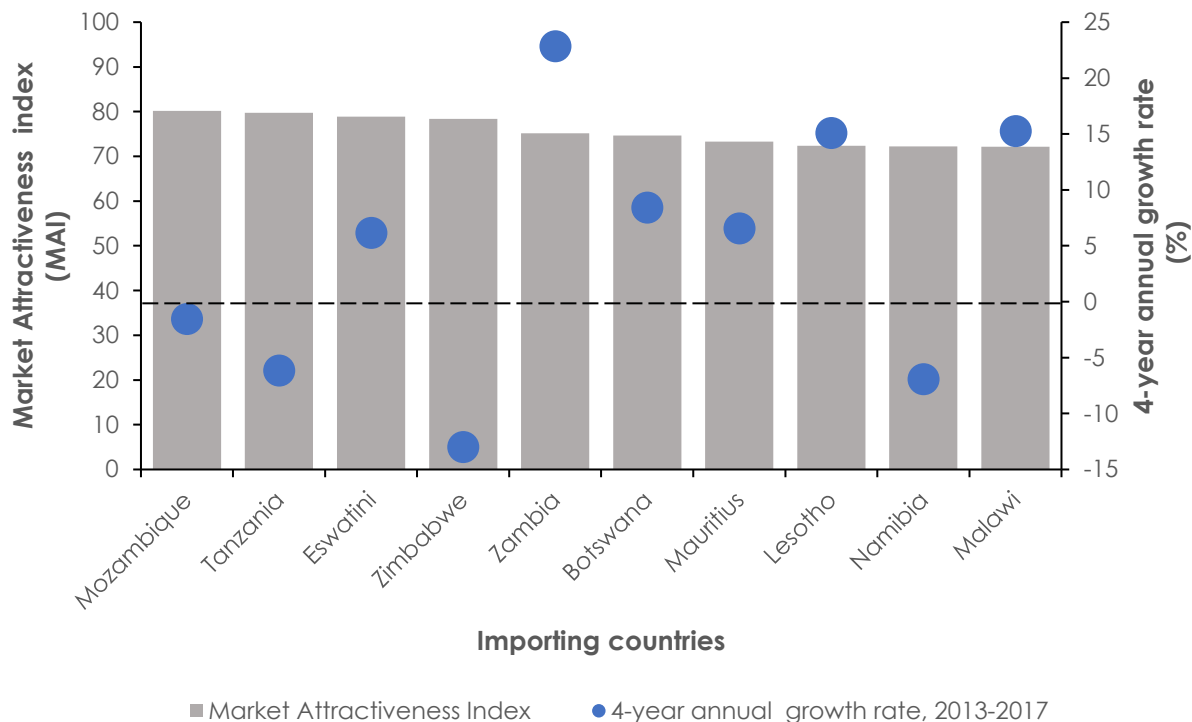


Figure 9: MAI results for Apples (HS: 080810) in Africa.

Source: Own compilation based Quantec, 2019 data

5.3 Juice of fruit or vegetable (HS: 200989)

The top ten Attractive markets for Western Cape exports of Juice of fruit or vegetable to African markets are Botswana, Namibia, Eswatini, Mauritius, Ethiopia, and others indicated in Figure 9. In 2017, the value of Western Cape exports of the juice of fruit and vegetable to Botswana was R133 million and total imports into the country increased by 50% in the past 4-years. Western Cape exports to markets such as Zambia, DR Congo and Malawi has performed particularly well, growing significantly in the past 4-years, but from a relatively smaller base, compared to bigger importers. It should however also be noted that Western Cape has seen declining growth in several countries within the top ten for fruit and vegetables juices such as Eswatini (-19%), Mauritius (-16%), Madagascar (-42%) and Ghana (-7%) (Quantec, 2019). In the extreme case of Ethiopia, the Western Cape exports dropped by 100% from 2016 to 2017, which suggest that some African markets remains risky and volatile which should be, acknowledge developing export strategies.

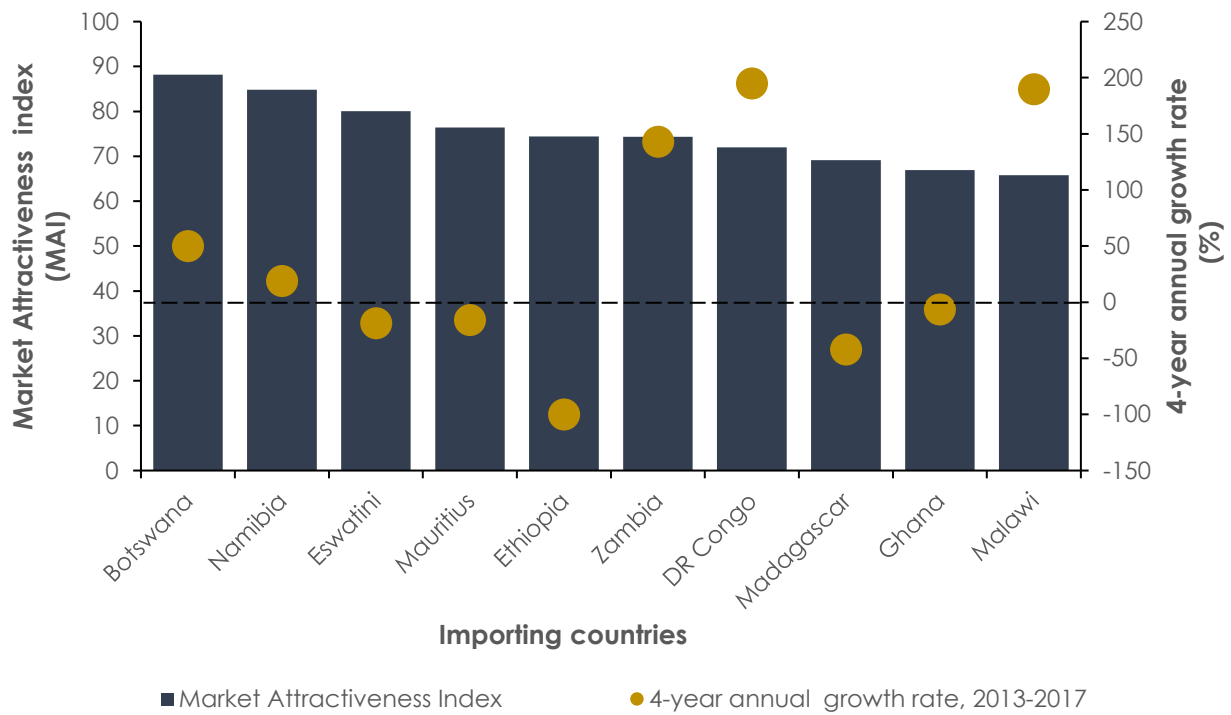


Figure 10: MAI results for Juice of fruit or vegetable (HS: 200989) in Africa.

Source: Own compilation based Quantec, 2019 data

5.4 Milk and cream (HS: 040120)

Botswana is the most attractive market for the Western Cape exports of milk and cream, followed by Mozambique, Eswatini and others (Figure 10). Botswana's imports value for milk and cream products in 2017 was R119 million, showing a growth of 102% in the past 4 years. The Western Cape export performance in Namibia, Angola and Lesotho has been really good, whilst Zimbabwe stopped importing milk and cream in the 2017 year.

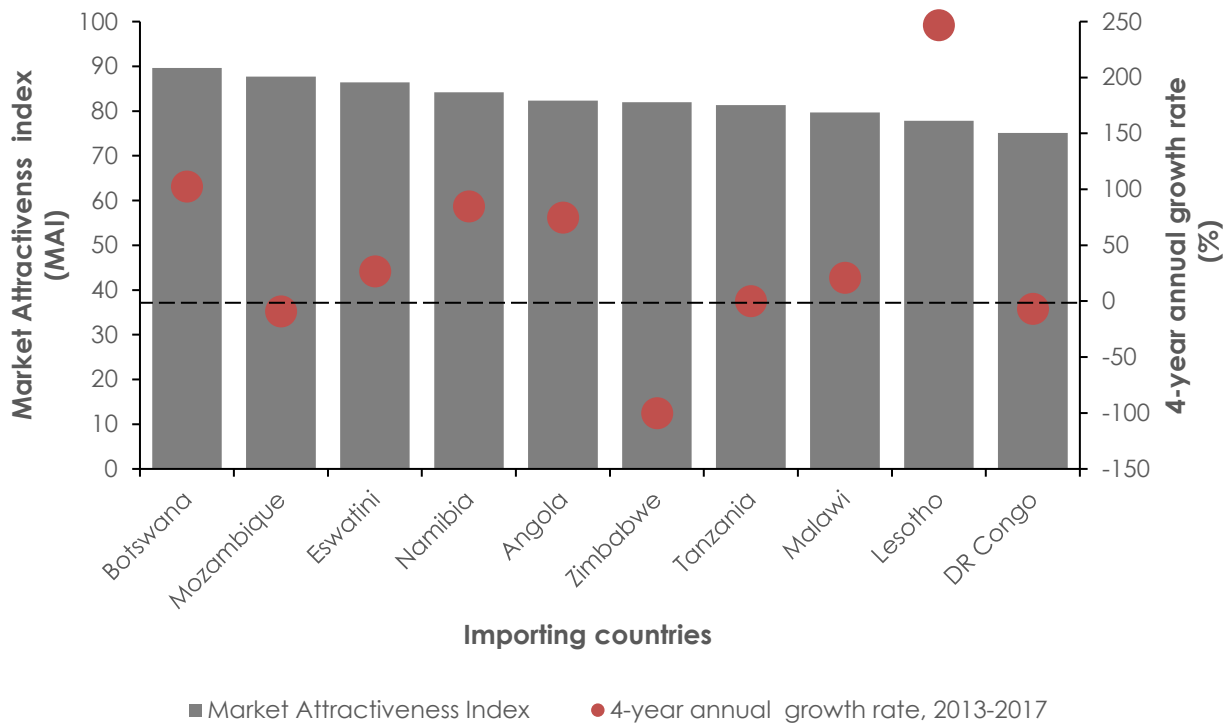


Figure 11: MAI results for Milk and cream (HS: 040120) in Africa.

Source: Own compilation based Quantec, 2019 data

5.5 Mixture of juices (HS: 200990)

Listed under the HS code: 200990 are all fruit or vegetable juice mixtures which are not specifically captured on other item listed under HS code: 2009. The most attractive markets for Western Cape exports of juice mixtures are Mozambique, Botswana, Lesotho and Namibia to name a few (Figure 11). Of particular interest are those markets where the Western Cape is expanding its footprint, which is Mozambique, Lesotho, Seychelles, Mauritius and DRC. Of these, Seychelles, which is the eighth-most attractive market for this product, significantly increased the value of its annual imports by 122% in the past 4 years but also from low based.

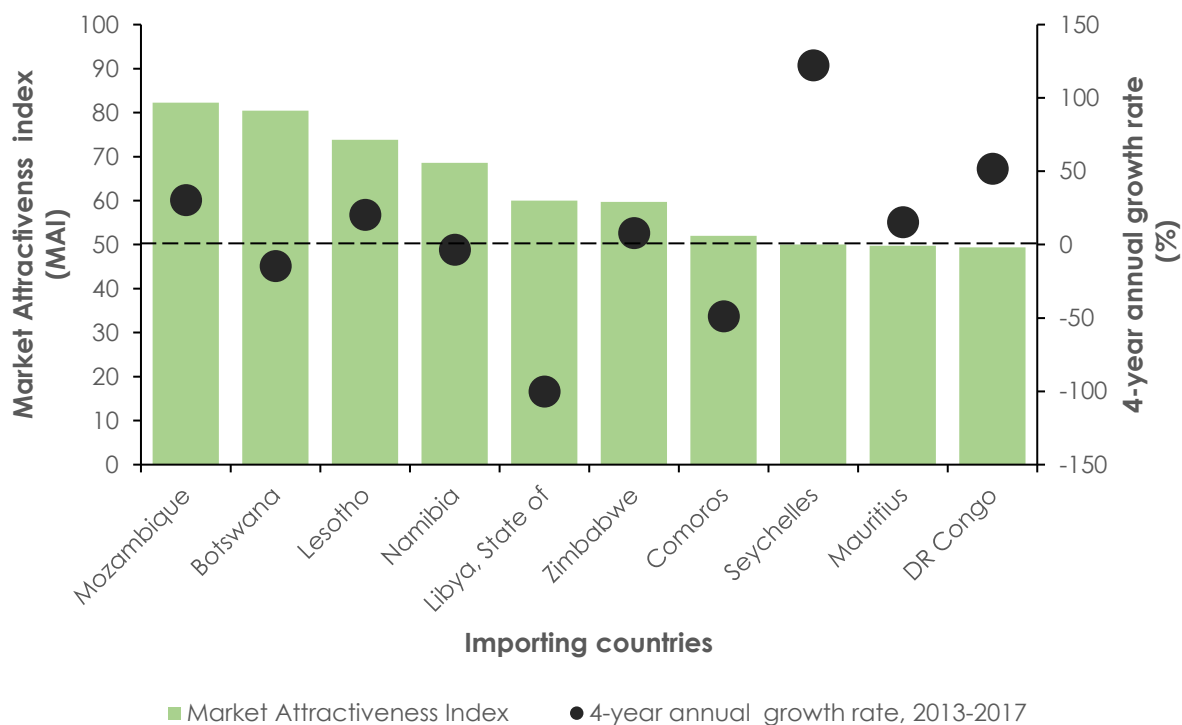


Figure 12: MAI results for Mixture of juices (HS: 200990) in Africa.

Source: Own compilation based Quantec, 2019 data

6. Conclusion

Agricultural trade has the potential to catalyse the process of economic, social and political integration in Africa. In this second update of “the Africa Agenda” research study, Africa’s position as a trade and investment destination is supported by the increasing consensus among African nations to harmonise their trading systems and promote intra-continental trade through the elimination of tariffs and other non-tariff barriers. The establishment of the African Free Continental Free Trade Agreement, the Maputo Declaration on agriculture & food security and Malabo declaration corroborate the importance of agriculture to economic development in the continent. The changes in the agricultural sector are influenced by volatile food and energy prices, improved macroeconomic management, rapid urbanisation and growing population of African middle class, youth entering the labour market, and the emergence of new agricultural job opportunities. Africa’s economy only constitutes 2.75% of the global economy, which is relatively small compared to other regions of the world, but it is fast growing at 4.3% per annum, second to Asia’s growth rate of 4.5% per annum. Interestingly, both these regions have the highest share human population in the world, and even in this case, Africa’s world population share of 16% is second to Asia’s share of 54%. The African continent continues to show a positive foreign direct investment inflows trend from 2001 to 2018, and this has grown alongside the

value of imports. Inter-continental trade trends of Agricultural products between South Africa, specifically the Western Cape and the rest of Africa, show a positive trade balance in the case of the Western Cape. Namibia, Botswana and Angola remain the largest markets for agricultural exports from the Western Cape, whilst some smaller markets also saw good growth since 2014. The country analysis conducted in this report reveals that countries such as Namibia, Botswana, Nigeria, Kenya and Mauritius are attractive potential African markets for Western Cape investment and trade, based on some economic indicators (e.g GDP growth, ease of doing business, HDI, etc.). In terms of agriculture, these countries collectively accounted for R6.7 billion of Western Cape Agricultural exports in 2017.

The product analysis showed the dependence of African imports on products such as cereals (27%), followed by animal & vegetable oils (11%), food preparations (9%), sugar (9%) and dairy (6%) in value terms. Whereas, Western Cape exports to Africa is concentrated around fruits and wine products, which make up a combined 38% of the total. The Western Cape has distinct competitive advantages of delivering agricultural products on the continent as indicated by the relative trade advantage (RTA) index. Of the 257 agricultural products that the Western Cape trade with Africa, 64% of these products were competitive, 13% marginally competitive and 23% are uncompetitive. Some of the competitive products include fresh grapes, ciders, colza, pig fat, fresh lean meat, oats, vinegar and mushrooms & truffles.

Finally, the Markets Attractiveness Index revealed several attractive markets for the following agricultural products: bottled wine, fresh apples, fruit & vegetable juice, mixed fruit juice and milk & cream. Countries such as Namibia, Mozambique, Botswana, Mauritius and Angola routinely featured amongst the top ten attractive markets and the Western Cape is already expanding exports in the markets. Overall, this report has highlighted the Western Cape's trading relationship with Africa in agricultural exports and pointed to potential increased investment and trade into several key markets. The market intelligence provided should be carefully considered to formulate appropriate policy directives for the Western Cape Government for the next five years.

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8. Annexure

Annexure A: Country Attractiveness Index (CAI)

Rank	Country	Country Attractiveness Index	GDP 2017 USD (millions)	GDP Growth Expectations 2019-2024 years (%)	Population Totals ('000)	Population Growth Estimates (2017-2050)	Ease of doing business (Rank)	Human Development Index	Agriculture's share of GDP	WC Total Export Value 2017 (R millions)	WC Total Export Growth (5 year)	WC Agricultural Export Value 2017 (R millions)	WC Agricultural Export Growth (5 year growth)	Urbanisation (%)	Logistics performance index	Distance to Market (KM)
1	Namibia	53.1	13 254	5.1	2 534	1.6	107	0.65	7.0	11 458	1.3	3 293	9.3	49.0	2.8	1 324
2	Botswana	50.8	17 407	6.5	2 292	1.2	86	0.72	2.0	6 877	-4.0	1 802	10.6	68.7	2.8	522
3	Nigeria	49.2	375 745	4.7	190 886	2.3	146	0.53	20.8	1 227	-20.3	706	17.3	49.5	2.6	4 719
4	Kenya	46.2	79 263	8.3	49 700	2.0	61	0.59	34.6	2 993	5.8	423	12.2	26.6	2.6	3 233
5	Mauritius	42.0	13 266	6.2	1 265	-0.1	20	0.79	3.1	1 469	24.9	494	15.5	40.8	2.8	3 223
6	Egypt	41.8	235 369	8.2	97 553	1.4	120	0.70	11.5	91	-11.2	25	6.6	42.7	2.8	6 582
7	Tanzania	41.5	52 090	6.8	57 310	2.7	144	0.54	28.7	858	0.8	134	4.9	33.1	2.8	2 725
8	Rwanda	41.4	9 135	10.1	12 208	1.8	29	0.52	31.0	42	-13.2	10	7.5	17.1	2.8	3 001
9	Zambia	41.3	25 868	4.8	17 094	2.7	87	0.59	6.7	2 784	6.5	677	17.5	43.0	2.3	1 587
10	Côte d'Ivoire	39.3	37 353	9.0	24 295	2.3	122	0.49	21.6	182	-11.4	65	13.7	50.3	2.9	5 162
11	Mozambique	39.2	12 646	8.8	29 669	2.5	135	0.44	21.3	1 910	0.4	638	11.5	35.5	2.2	879
12	Angola	39.2	122 124	5.3	29 784	2.9	173	0.58	10.0	2 498	-2.0	1 050	-1.7	64.8	1.9	2 539
13	Morocco	39.2	109 709	6.4	35 740	0.7	60	0.67	12.4	47	24.9	14	22.1	61.9	2.4	7 814
14	Togo	37.7	4 758	7.6	7 798	2.1	137	0.50	41.8	706	14.6	53	26.4	41.2	2.2	4 886
15	Somalia	37.6	7 052	5.7	14 743	2.7	190	0.35	75.0	27	20.3	23	155.2	44.4	1.8	4 059
16	Ghana	37.5	58 997	6.9	28 834	1.8	114	0.59	19.7	493	4.4	300	6.7	55.4	2.4	4 925
17	Djibouti	37.2	1 845	8.2	957	1.0	99	0.48	2.2	75	18.8	12	20.6	77.6	2.8	4 821
18	Sao Tome and Principe	37.1	393	7.1	204	1.9	170	0.59	11.5	8	53.9	2	49.0	72.0	2.3	3 924
19	Uganda	37.0	25 995	8.5	42 863	2.8	127	0.52	24.6	284	19.7	77	15.9	23.2	2.2	3 332
20	Malawi	36.6	6 303	8.1	18 622	2.5	111	0.48	26.1	427	8.9	160	25.4	16.7	2.2	1 726
21	Congo, Dem. Rep.	36.5	37 642	6.8	81 340	2.7	184	0.46	19.9	1 098	13.6	139	19.6	43.9	2.1	2 718
22	Algeria	36.3	167 555	3.1	41 318	1.0	157	0.75	12.3	276	22.6	34	19.3	72.1	2.4	7 643
23	Ethiopia	36.0	80 561	9.3	104 957	1.8	159	0.46	34.0	60	9.7	45	47.1	20.3	2.1	4 434
24	Senegal	35.4	21 070	10.7	15 851	2.3	141	0.51	16.0	268	6.3	189	31.4	46.7	2.2	6 756
25	Gabon	35.1	15 014	6.4	2 025	1.7	169	0.70	5.2	121	-21.4	77	13.8	89.0	2.1	3 694
26	Eswatini	35.0	4 434	3.6	1 367	1.3	117	0.59	8.4	2 454	2.7	874	14.6	23.6	2.3	428
27	Madagascar	34.8	11 500	7.2	25 571	2.3	161	0.52	20.0	180	33.9	72	23.8	36.5	2.2	2 309
28	Seychelles	34.5	1 498	5.9	96	0.1	96	0.80	1.9	221	17.5	71	23.5	56.3	2.3	4 028
29	Tunisia	34.5	39 952	6.0	11 532	0.6	80	0.73	9.5	21	77.4	2	-6.8	68.6	2.1	7 432
30	Cameroon	33.8	34 923	7.3	24 054	2.2	166	0.56	14.4	141	-21.0	79	-10.5	55.8	2.6	4 224
31	Sudan	33.6	117 488	2.4	40 533	2.1	162	0.50	30.5	106	41.2	21	17.3	34.4	2.2	4 884
32	South Sudan	32.6	2 904	8.2	12 576	2.1	185	0.39	30.5	2	81.6	1	51.0	19.3	2.3	4 884
33	Benin	32.5	9 247	8.7	11 176	2.3	153	0.51	23.0	86	-7.7	35	-24.5	46.8	2.5	4 868
34	Zimbabwe	32.5	22 041	6.1	16 530	1.8	155	0.53	8.3	1 651	1.4	588	7.5	32.2	1.8	1 101
35	Burkina Faso	32.4	12 323	8.2	19 193	2.5	151	0.42	28.7	34	64.8	9	7.4	28.7	2.4	5 551
36	Mauritania	32.2	5 025	9.2	4 420	2.2	148	0.52	23.1	27	12.4	9	-3.0	52.8	2.3	6 899
37	Mali	32.1	15 334	7.0	18 542	2.7	145	0.43	38.3	334	16.1	3	-19.9	41.6	2.3	5 954
38	Lesotho	31.8	2 578	4.1	2 233	1.1	106	0.52	6.1	2 561	4.4	480	9.6	27.7	2.0	369
39	Chad	31.3	9 871	7.1	14 900	2.5	181	0.40	49.1	5	89.4	1	-1.2	22.9	2.4	4 621
40	Congo, Rep.	31.1	8 701	3.5	5 261	2.4	180	0.61	6.4	104	-40.1	74	9.0	66.5	2.1	3 096
41	Comoros	29.8	1 068	5.3	814	1.8	164	0.50	29.9	2	-33.6	2	13.2	28.8	2.3	2 536
42	Niger	29.8	8 120	9.2	21 477	3.6	143	0.35	39.7	2	-5.0	1	-12.5	16.4	2.0	5 353
43	Liberia	29.0	3 285	3.0	4 732	2.2	174	0.44	37.1	143	7.6	25	32.3	50.7	1.9	5 595
44	Gambia, The	28.5	1 489	7.1	2 101	2.4	149	0.46	23.0	32	21.2	4	10.8	60.6	1.8	6 621
45	Cabo Verde	27.4	1 773	7.2	546	0.9	131	0.65	6.0	1	-12.1	-	-100.0	65.3	2.3	7 392
46	Eritrea	27.2	6 050	6.6	3 499	2.0	189	0.44	11.7	10	3.9	3	-13.5	33.2	1.9	5 071
47	Sierra Leone	27.0	3 775	7.4	7 557	1.7	163	0.42	60.3	28	3.7	14	13.5	41.6	1.8	5 942
48	Guinea-Bissau	26.5	1 347	7.2	1 861	2.0	175	0.46	49.0	3	-24.1	0	0.0	42.9	1.8	6 433
49	Guinea	26.4	10 473	7.7	12 717	2.3	152	0.46	16.4	16	24.6	6	43.5	35.8	1.6	6 056
50	Libya	26.0	38 108	3.6	6 375	0.7	186	0.71	1.3	14	-12.4	11	-19.0	79.8	2.2	6 902
51	Equatorial Guinea	24.8	12 294	-1.4	1 268	2.5	177	0.59	2.3	10	-11.9	5	-6.5	71.6	1.9	3 996
52	Central African Republic	24.7	1 949	7.2	4 659	2.0	183	0.37	39.6	1	-12.6	-	0.0	41.0	1.9	3 890
53	Burundi	21.9	3 172	2.6	10 864	2.7	168	0.42	30.6	5	-33.3	0	-43.2	12.7	2.0	2 848