U.S.-Africa Trade Flows and Effects of the Uruguay Round Agreements and U.S. Trade and Development Policy

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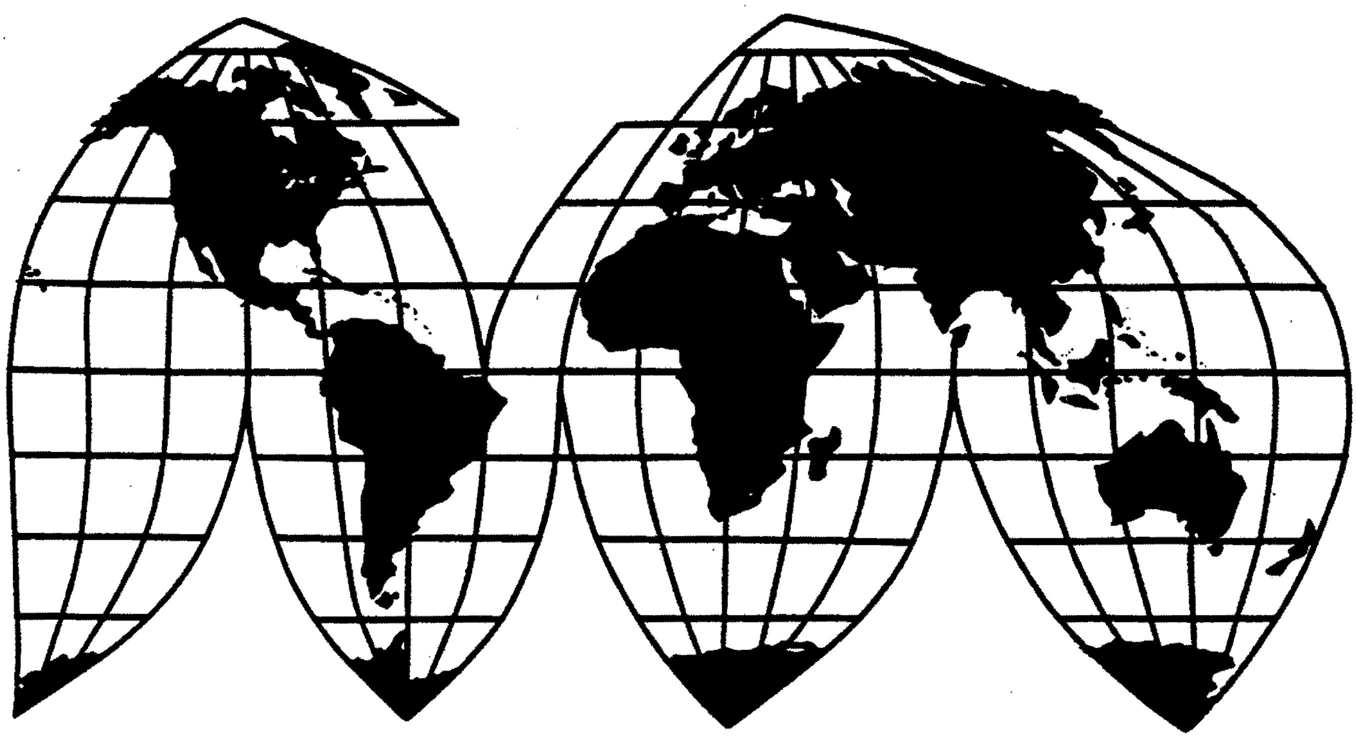

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1996 Annual Report

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GLOSSARY OF ABRREVIATIONS

AfDB	African Development Bank
AfDF	African Development Fund
AEF	Africa Enterprise Fund
ATWT	Average Trade-Weighted Tariff
AVE	Ad Valorem Equivalent
BLS	Botswana, Lesotho and Swaziland
BLNS	Botswana, Lesotho, Namibia, and Swaziland
CBI	Cross-Border Initiative
COMESA	Common Market for Eastern and Southern Africa
DAF	Development Assistance Fund
DFA	Development Fund for Africa
ECOWAS	Economic Community of West African States
EEP	Export Enhancement Program
EMP	Emerging Markets Program
EU	European Union
Eximbank	Export-Import Bank of the United States
FPI	Foreign Portfolio Investment
GATT	General Agreement on Tariffs and Trade
GEIS	General Export Incentive Scheme
GNP	Gross National Product
GSP	Generalized System of Preferences
IDA	International Development Association
IFC	International Finance Corporation
IMF	International Monetary Fund
MIGA	Multilateral Investment Guarantee Agency
MFA	MultiFibre Arrangement
NTF	Nigeria Trust Fund
OECD	Organization for Economic Cooperation and Development
OPIC	Overseas Private Investment Corporation
PTA	Preferential Trade Area
PTC/EAC	Permanent Tripartite Commission of the East African Community
SACU	Southern African Customs Union
SADC	Southern African Development Community
TDA	Trade and Development Agency
TRIMs	Trade-Related Investment Measures
TRIPS	Trade-Related Aspects of Intellectual Property
UNCTAD	United Nations Conference on Trade and Development
UR	Uruguay Round
URA	Uruguay Round Agreements
USAID	U.S. Agency for International Development
USDA	U.S. Department of Agriculture
USDIA	U.S. Direct Investment Abroad
USITC	U.S. International Trade Commission
USTR	U.S. Trade Representative (title) and Office of United States Trade Representative
WAEMU	West African Economic and Monetary Union
WAMA	West African Monetary Agency
WTO	World Trade Organization

EXECUTIVE SUMMARY

Background

On June 11, 1996, the U.S. International Trade Commission (Commission) received a letter from the United States Trade Representative (USTR) identifying the types of information that the Commission should include in its second annual report on U.S.-Africa Trade Flows and Effects of the Uruguay Round Agreements and U.S. Trade and Development Policy. The USTR letter requested that the second report on U.S.-Africa trade flows contain the following information:

1. An update, for the latest year available, on U.S.-Africa trade and investment flows for both overall totals and for the following major sectors: agriculture, forest products, textiles and apparel, footwear, energy, chemicals, minerals and metals, machinery, transportation equipment, electronics technology, miscellaneous manufactures, and services.

2. An identification of major developments in the World Trade Organization and U.S. trade/economic policy and commercial activities which significantly affect U.S.-Africa trade and investment flows by sector during the latest year. Similarly, to the extent possible, changing trade and economic activities within African countries that have a significant impact should be highlighted.

3. Progress in regional integration in Africa.

The USTR requested that the Commission focus on 48 Sub-Saharan African countries.[1] Additionally, the USTR requested that basic trade flow information be provided for U.S. trade with the following regional groups:

- The Southern African Customs Union (SACU)
- The Southern African Development Community (SADC)
- Western African Economic and Monetary Union (WAEMU)
- Common Market for Eastern and Southern Africa (COMESA)

Major developments in the World Trade Organization and in trade, economic, and commercial activities in the United States and Sub-Saharan Africa cited in the second annual report cover the period from January 1995 through August 1996.

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[1] Angola, Benin, Botswana, Burkina, Burundi, Cameroon, Cape Verde, Central African Republic, Chad, Comoros, Congo, Côte d'Ivoire, Djibouti, Equatorial Guinea, Eritrea, Ethiopia, Gabon, Gambia, Ghana, Guinea, Guinea-Bissau, Kenya, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mauritius, Mozambique, Namibia, Niger, Nigeria, Rwanda, São Tomé and Principe, Senegal, Seychelles, Sierra Leone, Somalia, South Africa, Sudan, Swaziland, Tanzania, Togo, Uganda, Zaire, Zambia, and Zimbabwe.

Study Overview and Findings

Macroeconomic Background

- The 48 Sub-Saharan African countries covered in this report represent a diverse set of countries. Thirty-eight of the countries covered in this report are classified by the World Bank as low income (1994 gross national product [GNP] per capita of $725 or less), six as lower middle income (1994 GNP per capita of $726 to $2,985), and four as upper middle income (1994 GNP per capita of $2,896 to $8,955).

- The economies of many of these countries depend heavily on agriculture, forest products, minerals, metals, and energy products for generating export earnings and income. The diversified exporters include Cameroon, Central African Republic, Kenya, Mauritius, Senegal, Sierra Leone, and South Africa.

- Twenty-nine of the covered countries are classified by the World Bank as severely indebted, meaning that the ratio of debt service to GNP or to exports is considered above critical levels. Many of the countries in Sub-Saharan Africa have limited or no access to financial markets; thus, the region is a major recipient of official development finance from multilateral and bilateral donors.

- Sub-Saharan Africa experienced a 3.8-percent growth in real income in 1995, up from 1.7 percent in 1994, according to World Bank estimates. Economic growth in the region is estimated to be slightly below the average of 3.9 percent for all low-and middle-income countries in 1995.

U.S.-Sub-Saharan Africa Trade

- The European Union (EU) is Sub-Saharan Africa's largest trading partner, accounting for 43 percent of the region's merchandise imports and 37 percent of its exports in 1995. The United States is by far the largest single importer of merchandise from Sub-Saharan Africa, followed by Italy, France, Germany, and the United Kingdom. France was the largest exporter of merchandise to the region in 1995, followed by Germany and Japan.

- Sub-Saharan Africa accounted for about 1 percent of U.S. commodity exports and 2 percent of U.S. commodity imports in 1995. U.S. merchandise exports to Sub-Saharan Africa amounted to $5.3 billion in 1995, up from $4.3 billion in 1994. U.S. imports amounted to $12.9 billion in 1995, up from $12.1 billion in 1994. The U.S. merchandise trade deficit with Sub-Saharan Africa was $7.6 billion in 1995.

- U.S. minerals and metals exports to Sub-Saharan Africa, which largely consist of iron and steel pipe for oil and gas transport and drilling, experienced the largest rate of increase during 1994-95 (49.0 percent), followed by exports of chemicals and related products (45.4 percent) and forest products (38.8 percent). A 7.5-percent increase in imports of energy-related products (mainly crude oil) largely accounted for the increase in imports from the region. Some sectors which account for a relatively small amount of U.S. imports from Sub-Saharan Africa achieved relatively large import growth rates during 1994-95, however. These sectors and their growth rates include electronic products (71.3 percent), transportation equipment (57.9 percent), chemicals and related products (48.0 percent), forest products (35.0 percent), and machinery (20.9 percent).

- The major U.S. merchandise export markets in Sub-Saharan Africa are South Africa and Nigeria. These countries together accounted for 62 percent of U.S. exports to the region in 1995. Other important markets in 1995 and their export shares include Angola (4.9 percent), Côte d'Ivoire (3.3 percent), Ghana (3.1 percent), Ethiopia (2.8 percent), and Zimbabwe (2.3 percent).

- Major merchandise import suppliers include Nigeria, Angola, South Africa, and Gabon. These four countries accounted for 85 percent of U.S. imports from Sub-Saharan Africa in 1995. U.S. imports from South Africa are diversified across sectors. Imports from Nigeria, Angola, and Gabon are heavily concentrated in energy-related products, particularly crude oil.

- The average trade-weighted duty on U.S. imports from Sub-Saharan Africa fell from 1.9 percent in 1994 to 1.7 percent in 1995. The highest average tariffs on U.S. imports from Sub-Saharan Africa were on textiles and apparel (17.8 percent), footwear (10.5 percent), agricultural products (8.2 percent), and chemicals and related products (6.5 percent). In 1995, 67 percent of U.S. imports from the region were dutiable.

- U.S. imports from Sub-Saharan Africa under the Generalized System of Preferences (GSP) program rose from $328.6 million in 1994 to $488.8 million in 1995, or by 48.7 percent, and accounted for 3.8 percent by value of total U.S. imports from the region. Much of this increase was due to higher imports from South Africa, which rose from $181.2 million in 1994 to $357.0 million in 1995, or by 97.0 percent, and amounted to 73.1 percent of such imports from the region. Sectors with the largest growth rates for GSP imports during 1994-95 include transportation (142 percent), chemicals and related products (100 percent), and minerals and metals (90 percent). Minerals and metals and agricultural products were the largest sectors for imports entering under GSP from Sub-Saharan Africa, accounting for 45.4 and 16.7 percent, respectively, of such imports in 1995.

- Services trade data cover 42 African countries. The United States recorded a service-trade surplus with Africa of $886 million in 1994, the latest year for which data are available. In addition, U.S. affiliates located in Africa recorded sales of services valued at $793 million in 1993, exceeding African affiliates' sales in the United States by $581 million.

U.S. Investment in Sub-Saharan Africa

- According to the U.S. Department of Commerce, U.S. direct investment in Sub-Saharan Africa grew from $3.6 billion at yearend 1994 to $4.5 billion in 1995, or by 25.3 percent, and amounted to 0.6 percent of total U.S. direct investment abroad (USDIA) in 1995.

- Of the total USDIA in Sub-Saharan Africa, $1.3 billion, or 28.3 percent, was in South Africa, $650 million, or 14.5 percent, was in Angola, and $595 million, or 13.3 percent, was in Nigeria. In addition to USDIA, the United States had net portfolio equity flows to South Africa and Ghana equal to $372 million and $6 million, respectively, in 1995. USDIA in Sub-Saharan Africa is concentrated in petroleum, mining, and various manufacturing sectors.

Developments in the World Trade Organization

Developments in the World Trade Organization (WTO) during 1995-96 were centered around the implementation and administration of the Uruguay Round Agreements (URA). The principal activities in the WTO affecting Sub-Saharan Africa were:

- By July 30, 1996, 33 countries in Sub-Saharan Africa had joined the WTO.

- The WTO Committee on Trade and Development (CTD) was given specific responsibility for matters concerning least-developed WTO members. During 1995-96, the CTD created the Subcommittee on Least-Developed Countries, organized a workshop to help members meet notification requirements, and reviewed trade issues affecting developing countries.

- The WTO held two regional seminars in Sub-Saharan Africa to educate developing and least developed countries regarding the content and requirements of the Uruguay Round Agreement on Sanitary and Phytosanitary Measures. The WTO Committee on Balance of Payments Restrictions held full consultations with Nigeria and South Africa regarding restrictive trade measures that had been taken for balance of payments considerations. The WTO Committee on Agriculture undertook some administrative actions under the Decision on Measures Concerning the Possible Negative Effects of the Reform Programme on Least-Developed and Net Food-Importing Developing Countries.

- The WTO instituted an Africa Initiative in 1995 to encourage the growth and diversification of Africa's international trade. The initiative mainly involves increased technical cooperation and assistance and a research project investigating the implications of the URA for African countries.

U.S. Economic and Trade Policies Affecting Sub-Saharan Africa

U.S. economic and trade policies affecting Sub-Saharan Africa include U.S. contributions to multilateral lending and investment guarantee agencies and U.S. bilateral trade and economic assistance programs. These programs benefit U.S. trade and investment in the region and provide financial and other assistance for Sub-Saharan Africa's economic development. General trends in multilateral and U.S. bilateral programs during 1995-96 were:

Multilateral Programs

- Fiscal year (FY) 1995 lending commitments to Sub-Saharan Africa by the World Bank amounted to $2.3 billion, down from $2.8 billion in FY 1994. Donors agreed to a new funding package for the World Bank's International Development Association (IDA) which allows for concessional lending of $22 billion to all poor countries during FYs 1997-99. The funding package includes an Interim Trust Fund (ITF) for FY 1997 of about $3.0 billion. U.S. companies will not be able to bid on procurement of goods and services for IDA projects funded through the ITF, as the United States has announced it will not contribute to this fund.

- FY 1995 lending to Sub-Saharan Africa by the various agencies of the African Development Bank (AfDB) fell to $472.9 million, down from $1.4 billion in FY 1994, due to requests by donors that management reforms be undertaken before agreeing to a further replenishment of AfDB lending operations. In mid-1996, donors agreed to a funding package of about $3.0 billion for the African Development Bank Fund covering FYs 1996-98. South Africa became a member of the AfDB as of December 31, 1995.

- Net concessional loan disbursements to Sub-Saharan African countries by the International Monetary Fund (IMF) in 1995 amounted to $1.5 billion, up from $461.3 million in 1994. Both the IMF and the World Bank are currently working on an initiative to provide debt relief to heavily indebted poor countries. Possibly 16 to 19 countries in Sub-Saharan Africa could be eligible for this initiative.

- The United States provided debt relief through the Paris Club of creditor nations to six Sub-Saharan African countries in FY 1995. The bilateral agreements negotiated with the six countries covered $188.7 million in nonconcessional debt.

Bilateral Programs

- At yearend 1995, financial support by the Export-Import Bank of the United States (Eximbank) for exports to Sub-Saharan Africa amounted to $2.8 billion, down from $3.2 billion in 1994. Nine countries in Sub-Saharan Africa were eligible for all Eximbank programs, and four countries were eligible for some programs in 1995. Countries in Sub-Saharan Africa have 69.7 percent of total delinquency on Eximbank credits.

- During FY 1995, Overseas Private Investment Corporation (OPIC) assistance to Sub-Saharan Africa amounted to $173.7 million, down from $236.5 million in FY 1994. OPIC established the New Africa Opportunities Fund, a privately managed equity fund, to encourage entrepreneurship in South Africa and neighboring countries in 1995. As of August 31, 1996, OPIC programs were suspended in six countries in Sub-Saharan Africa due to foreign policy reasons.

- Obligations of the U.S. Trade and Development Agency (TDA) in Sub-Saharan Africa amounted to $3.9 million during FY 1995, up from $2.8 million in FY 1994.

- The U.S. GSP program, which expired on July 31, 1995, was extended until May 31, 1997, in legislation signed into law on August 20, 1996. The new law additionally allows for products from least developed countries to be added to the GSP list provided that such imports would have only a minimal impact on the U.S. industry.

- The United States bilateral assistance to Sub-Saharan Africa administered by the U.S. Department of Agriculture and the U.S. Agency for International Development (USAID) amounted to $1.5 billion in FY 1995, of which $555.4 million was food assistance. The Development Fund for Africa was discontinued in FY 1996. Development Assistance programs, which amounted to $869.8 million in FY 1995, are now funded from the USAID's general Development Assistance Fund.

U.S. and Sub-Saharan African Economic and Trade Policies Affecting U.S. Trade and Investment in Major Sectors

Developments affecting U.S. trade with and investment in Sub-Saharan Africa in major merchandise and service sectors include:

- The U.S. agricultural trade surplus with Sub-Saharan Africa increased by 165 percent to $249.7 million in 1995. U.S. exports were facilitated by various food assistance and trade programs, with grains, flours and meals, pulses, and vegetable oils the primary commodities shipped to the region under these programs. A number of countries in Sub-Saharan Africa, notably South Africa and Nigeria, reduced tariffs and other barriers on items of interest to U.S. agricultural exporters. South Africa also agreed to reduce an export subsidy program which has benefited its agricultural exports in the past. The United States imposed a tariff-rate quota on tobacco imports in 1995 which affected imports from a number of countries in the region.

- The U.S. forest products trade surplus with Sub-Saharan Africa increased to $135.1 million in 1995. U.S. sector exports benefited from South Africa's elimination of import surcharges on forest products in October 1995. South African housing sector initiatives may further benefit U.S. sector exports. U.S. imports of forest products, especially chemical pulps from South Africa, are likely to increase slowly with the liberalization of tariffs and nontariff barriers under the URA.

- The U.S. trade surplus with Sub-Saharan Africa in chemicals and related products increased to $478.9 million in 1995. U.S. exports to Nigeria and South Africa, the largest markets, rose as both nations benefited from high export prices for agricultural raw materials which allowed them to purchase increased sector imports. U.S. sector imports from South Africa increased with South Africa's regained GSP status and its reintegration into the world economy. In particular, industries producing petrochemicals and intermediate chemicals in South Africa grew by over 10 percent in 1995.

- The U.S. trade deficit with Sub-Saharan Africa in energy-related products increased further in 1995 to $8.9 billion largely due to increases in the price for crude petroleum on the world market. Both Nigeria and Angola have made changes in their foreign investment laws which may benefit U.S. companies. South Africa, additionally, is beginning to open its energy sector to foreign investment.

investment laws which may benefit U.S. companies. South Africa, additionally, is beginning to open its energy sector to foreign investment.

- The U.S. trade deficit with Sub-Saharan Africa in the textiles and apparel and footwear sectors narrowed slightly in 1995 to $247.5 million. Low growth in U.S. imports was largely due to a decline in apparel imports from Kenya following imposition of quotas on men's and boys' cotton shirts. Increased U.S. sector exports in 1995 were due to higher exports of used clothing and other used textile articles. A number of countries in Sub-Saharan Africa, including South Africa, Zimbabwe, Senegal, Lesotho, Tanzania, and Ethiopia, took actions to encourage domestic textile production, while other countries, such as Ghana, encountered production difficulties and a loss of investment.

- The U.S. trade deficit with Sub-Saharan Africa in minerals and metals was relatively unchanged at $1.9 billion in 1995. Sector imports under GSP, largely from southern Africa, increased 90 percent in 1995. South Africa, the largest regional export market, continued to lower its duty rates on sector products, although tariff consolidations resulted in higher tariffs on some products, notably certain steel products. Export subsidies to South African exporters of certain sector products were also lowered during 1995-96. U.S. investments in Sub-Saharan Africa's mining sectors continued to benefit from Eximbank, TDA, and OPIC assistance, and from investment and procurement opportunities financed by multilateral agencies. More liberal foreign investment rules and mining law revisions in countries such as South Africa, Zambia, and Zimbabwe in 1995 may benefit U.S. investors.

- The U.S. trade surplus with Sub-Saharan Africa in machinery rose by 9 percent to $585.6 million in 1995. Increased U.S. machinery imports in 1995 were largely due to larger imports from South Africa under the GSP program. In 1995, South Africa and Nigeria, the largest sector export markets in the region, lowered import duties across the board on a number of products. A number of projects financed or sponsored by Eximbank, TDA, and OPIC are likely to benefit investment and trade in this sector. AfDB and World Bank projects also have the potential to increase demand for U.S. machinery.

- The U.S. trade surplus with Sub-Saharan Africa in transportation equipment, the leading sector for U.S. exports to the region, rose to $1.1 billion in 1995. Sector exports to leading markets, such as South Africa and Nigeria, continue to be hampered by high tariffs, although both countries implemented tariff reductions in 1995 that should benefit certain sector exports. Sector imports under the GSP program, which are largely from South Africa, increased by 142 percent in 1995. U.S. export and investment guarantee programs primarily benefit U.S. activities in South Africa, as sector markets in Nigeria and Angola are not eligible for Eximbank programs and no new OPIC programs have been introduced recently in Nigeria. U.S. sector exports also benefit from AfDB and World Bank funding opportunities.

- The U.S. trade surplus with Sub-Saharan Africa in electronic products increased to $706.6 million in 1995. U.S. sector exports to Sub-Saharan Africa have increased due to the widespread need for improved telecommunications and computing power. Problems in protecting intellectual property exist. In 1995, the Government of South Africa was assisted in stopping piracy by a number of South African firms, and Kenya amended its intellectual property laws to conform to World Intellectual Property Guidelines. Eximbank and TDA assistance, as well as AfDB-funded projects, have benefited U.S. companies in this sector.

- The U.S. trade surplus with Sub-Saharan Africa in miscellaneous manufactures declined to $4.3 million in 1995. High tariffs on sector products in Sub-Saharan African countries continue to hinder U.S. exports. The ability to produce export-quality finished goods continues to hinder Sub-Saharan African exports to the United States in this sector.

- The United States continued to run a sizeable trade surplus in services trade with Africa in 1994. U.S. services trade with Sub-Saharan Africa has been relatively unaffected by services negotiations in the WTO, as scheduled commitments by Sub-Saharan African countries are relatively modest. The development of U.S. services trade with Sub-Saharan Africa has been hampered by underdeveloped communication and transportation infrastructures. In FY 1996, to improve communications in the region, USAID launched the Leland Project to bring Internet connectivity to up to 20 countries in the region.

Progress in Regional Integration

- A number of accomplishments were achieved by regional integration groups during 1995-96. Progress was made on the development of a trade protocol by members of the Southern African Development Community (SADC). Member countries of SADC will eventually harmonize their tariff structures and eliminate internal tariffs under this protocol.

- The institutionalization of the Permanent Tripartite Commission for East African Cooperation (PTC/EAC) occurred as well as discussions about merging the SADC and the Common Market for Eastern and Southern Africa (COMESA). Discussions also continued on the renegotiation of the Southern African Customs Union (SACU), and various new and strengthened initiatives, including a study on implementing a common external tariff, were instituted by COMESA. ■

CHAPTER 1
Introduction

Purpose of the Report

Section 134 of the Uruguay Round Agreements Act[1] (URAA) directs the President to develop a comprehensive trade and development policy for the countries of Africa and to report to the Congress annually over the next 5 years on the steps taken to carry out that mandate. The Statement of Administrative Action[2] that was approved by the Congress in the URAA broadly outlines the Administration's plans for this work and the assistance needed from the U.S. International Trade Commission (Commission) for the President to fulfill this assignment.

On June 11, 1996, the Commission received a letter (see appendix A) from the United States Trade Representative (USTR) requesting that the second report[3] on U.S.-Africa trade flows contain the following information:

1. An update, for the latest year available, on U.S.-Africa trade and investment flows for both overall totals and for the following major sectors: agriculture, forest products, textiles and apparel, footwear, energy, chemicals, minerals and metals, machinery, transportation equipment, electronics technology, miscellaneous manufactures, and services. Basic trade flow information should also be provided for U.S. trade with the following regional groups:

   - The Southern African Customs Union (SACU)
   - The Southern African Development Community (SADC)
   - Western African Economic and Monetary Union (WAEMU)
   - Common Market for Eastern and Southern Africa (COMESA)

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[1] 19 U.S.C. 3554.
[2] "Statement of Administrative Action," *Uruguay Round Trade Agreements, Texts of Agreements, Implementing Bill, Statement of Administrative Action and Regional Supporting Statements, Message from the President of the United States,* September 27, 1994, House Document 103-316, pp. 73-74.
[3] The Commission's first report on U.S.-Africa trade flows was released in January 1996. See U.S. International Trade Commission (USITC), *U.S.-Africa Trade Flows and Effects of the Uruguay Round Agreements and U.S. Trade and Development Policy,* USITC publication 2938, Jan. 1996.

2. An identification of major developments in the World Trade Organization and U.S. trade/economic policy and commercial activities which significantly affect U.S.-Africa trade and investment flows by sector during the latest year. Similarly, to the extent possible, changing trade and economic activities within African countries that have significant impact should be highlighted.

3. Progress in regional integration in Africa.

The USTR requested the Commission to confine its investigation and report to 48 countries in Sub-Saharan Africa. The USTR requested that the Commission submit its report by October 4, 1996.

Approach

This report provides an update of the information presented in the Commission's first report on U.S.-Africa trade flows. The quantitative data in this report generally cover either calendar or fiscal year 1995, depending upon which data are available. In cases where it is useful to show a trend, data for 1991 through 1995 are provided. Developments in economic, trade, and commercial policies cover the period from January 1995 through August 1996, when possible.

A number of data sources were used to compile the information in this report. Annual data on the value of U.S. exports to and imports from Sub-Saharan Africa were obtained from the U.S. Department of Commerce. Data on U.S. investment flows to Sub-Saharan Africa were obtained from the U.S. Department of Commerce as well as the U.S. Treasury Department. Information on major developments in the World Trade Organization (WTO) likely affecting U.S.-Sub-Saharan Africa trade flows was collected from the WTO and from other public data sources. Information on U.S. trade and economic activities potentially affecting U.S.-Sub-Saharan Africa trade and investment flows was collected from the U.S. Department of Commerce, the U.S. Department of State, the U.S. Treasury Department, the Export-Import Bank of the United States (Eximbank), the Overseas Private Insurance Corporation (OPIC), the U.S. Department of Agriculture (USDA), the U.S. Trade and Development Agency (TDA), and other relevant U.S. agencies.

Data on trade and economic policy changes in countries in Sub-Saharan Africa, as well as information on multilateral project lending, were obtained from the U.S. Department of Commerce, the U.S. Department of State, the World Bank, the African Development Bank (AfDB), and the International Monetary Fund (IMF). The requested information on progress in regional integration was similarly obtained from public data bases, the Organization for Economic Cooperation and Development (OECD), and the AfDB. Additionally, staff requested such information through a cable sent to U.S. embassies in Sub-Saharan African countries. Interested parties were also invited to submit written statements to the Commission covering the subject matter in this report.[4]

[4] The Commission received one response, from ANSAC, an export association for producers of soda ash.

Scope of the Report

The following 48 Sub-Saharan African countries are covered in this investigation:

Republic of Angola (Angola)	Republic of Benin (Benin)
Republic of Botswana (Botswana)	Burkina Faso (Burkina)
Republic of Burundi (Burundi)	Republic of Cameroon (Cameroon)
Republic of Cape Verde (Cape Verde)	Central African Republic
Republic of Chad (Chad)	Federal Islamic Republic of the Comoros (Comoros)
Republic of the Congo (Congo)	Republic of Côte d'Ivoire (Côte d'Ivoire)
Republic of Djibouti (Djibouti)	Republic of Equatorial Guinea (Equatorial Guinea)
State of Eritrea (Eritrea)	Ethiopia
Gabonese Republic (Gabon)	Republic of the Gambia (Gambia)
Republic of Ghana (Ghana)	Republic of Guinea (Guinea)
Republic of (Guinea-Bissau)	Republic of Kenya (Kenya)
Kingdom of Lesotho (Lesotho)	Republic of Liberia (Liberia)
Republic of Madagascar (Madagascar)	Republic of Malawi (Malawi)
Republic of Mali (Mali)	Islamic Republic of Mauritania (Mauritania)
Republic of Mauritius (Mauritius)	Republic of Mozambique (Mozambique)
Republic of Namibia (Namibia)	Republic of Niger (Niger)
Federal Republic of Nigeria (Nigeria)	Republic of Rwanda (Rwanda)
Democratic Republic of São Tomé and Principe (São Tomé and Principe)	Republic of Senegal (Senegal)
Republic of Sierra Leone (Sierra Leone)	Republic of Seychelles (Seychelles)
Somalia	Republic of South Africa (South Africa)
Kingdom of Swaziland (Swaziland)	Republic of the Sudan (Sudan)
Republic of Togo (Togo)	United Republic of the Tanzania (Tanzania)
Republic of Zaire (Zaire)	Republic of Uganda (Uganda)
Republic of Zimbabwe (Zimbabwe)	Republic of Zambia (Zambia)

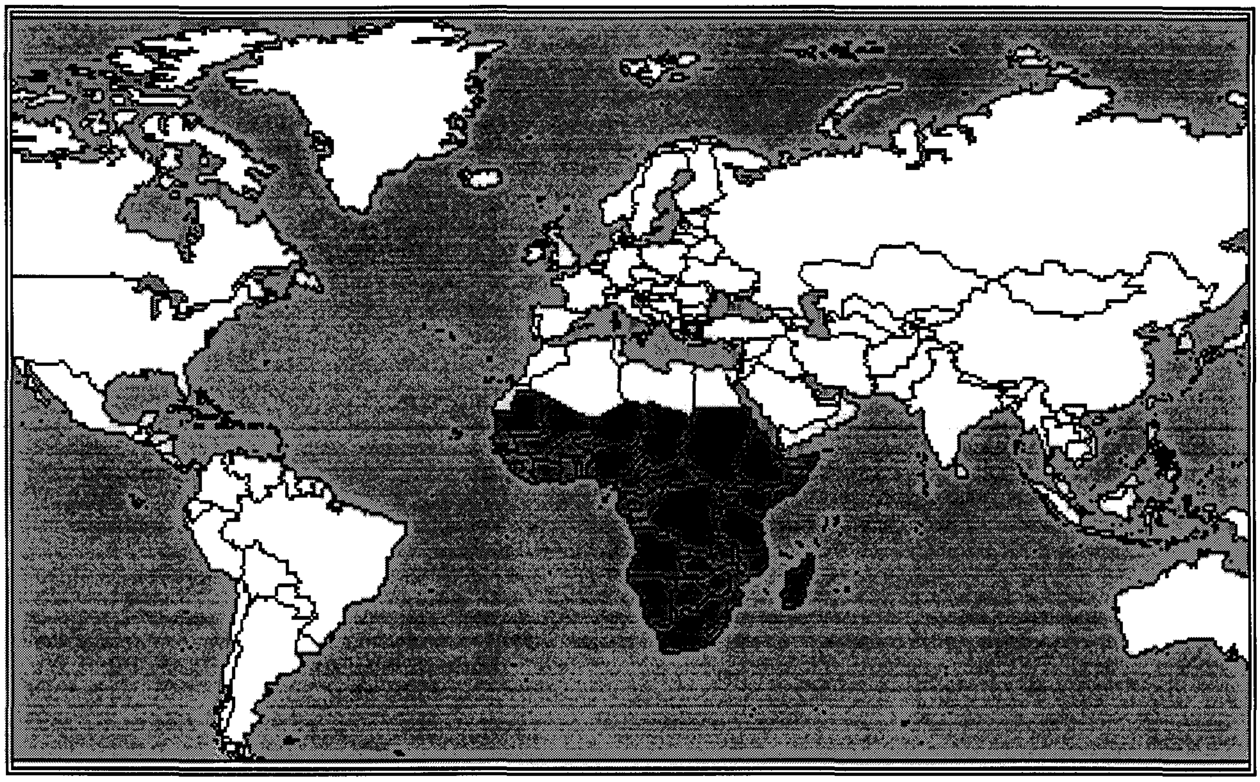
Figure 1-1 provides a map of the location of these countries and the region.

The merchandise sectors covered in the report include agricultural products, forest products, chemicals and related products, energy-related products, textiles and apparel, footwear, minerals and metals, machinery, transportation, electronic products, and miscellaneous manufactures. The trade data for these sectors have been aggregated from the Commission's trade-monitoring commodity groups and are provided for the 1991-95 period.

The service sectors covered in the report include telecommunications, education services, professional services, insurance, and royalties and license fees. The service sector trade data are limited, and there is a time lag in terms of availability. The services trade data cover U.S. sector trade with Africa,[5] and are provided for the 1991-94 period.

[5] The services trade data cover 42 countries in Africa, including Algeria, Egypt, Libya, Morocco, and Tunisia. See U.S. Department of Commerce, Bureau of Economic Analysis, *Survey of Current Business*, Aug. 1995, pp. 113-114.

Figure 1-1
Forty-eight countries of Sub-Saharan Africa



Source: Compiled by staff of the U.S. International Trade Commission from PC Globe.

Country Coverage

The 48 Sub-Saharan African countries covered in this report represent a diverse set of countries that vary widely in population, size, geography, natural resources, stage of economic development, and political stability. Despite political and economic obstacles, there are continuing opportunities for growth and development in the region. New leadership in many Sub-Saharan African countries is committed to building strong economies through restructuring, privatization, and deregulation.[6]

As noted in the Commission's first report on U.S.-Africa trade flows, drought, highly variable commodity prices, civil wars, and unstable governments have impeded economic development in some countries in the region.[7] Additionally, extensive government involvement in African economies, a lack of transparency in transactions, and periodic economic crises have tended to inhibit the development of commercial trade and investment relationships with the United States as well as other countries.[8] Relatively small markets, poor or deteriorating infrastructure, foreign exchange shortages, and high debt levels further tend to limit trade and

[6] Regina C. Brown, Deputy Assistant Secretary for African Affairs, U.S. Department of State, testimony at the USITC hearing on U.S.-Africa Trade Flows and Effects of the Uruguay Round Agreements on U.S. Trade and Development Policy, July 26, 1995.
[7] USITC, *U.S.-Africa Trade Flows and Effects of the Uruguay Round*, USITC publication 2938, pp. 1-6.
[8] Ibid., pp. 4-6-4-8.

investment in the region.[9] Many of the countries in Sub-Saharan Africa have limited or no access to financial markets; thus, the region is a major recipient of official development finance from bilateral donors and multilateral institutions.

Thirty-eight of the 48 countries covered in this report are classified by the World Bank as low income, six as lower middle income,[10] and four as upper middle income (table 1-1). The economies of most of these countries depend heavily on agriculture, forest products, minerals, metals, and energy products for generating export earnings and income. As shown in table 1-1, 31 of the covered countries depend on exports of petroleum or nonfuel primary products for generating foreign exchange. Only seven countries--Cameroon, Central African Republic, Kenya, Mauritius, Senegal, Sierra Leone, and South Africa--are classified as diversified exporters.

As shown in table 1-1, 29 of the covered countries are classified by the World Bank as severely indebted, meaning that the ratio of debt service to gross national product (GNP) or to exports is considered above critical levels. Sub-Saharan Africa's debt service/export ratio rose from 14 percent in 1994 to 14.7 percent in 1995 and its total debt outstanding rose from $212.4 billion in 1994 to $223.3 billion in 1995.[11] It is estimated that 30 percent of Sub-Saharan Africa's long-term debt outstanding at the end of 1995 was owed to multilateral institutions such as the World Bank, the IMF, and the AfDB.[12]

Sub-Saharan Africa experienced a 3.8-percent growth in real gross domestic product (GDP) in 1995, up from 1.7 percent in 1994, according to World Bank estimates.[13] Economic growth in the region is estimated to be slightly below the average of 3.9 percent for all developing countries in 1995. However, real income is projected by the World Bank to continue to grow at 3.8 percent a year during 1996-2005, a rate that is far below the rate of 5.3 percent which is forecast for all developing countries. Due to population growth, real per capita income growth for the region is estimated at 1.1 percent in 1995, up from -1.4 percent in 1994.[14]

A number of factors contributed to the relatively high growth rate for Sub-Saharan Africa in 1995. These include higher commodity prices, which may be short term in nature, improved economic policies, an upturn in the economy of the largest economy in the region, South Africa, and greater political stability, particularly in Mozambique and Angola.[15] Additionally, the successful devaluation of the CFA franc in West and Central Africa in 1994 appears to have contributed to an improved export performance among the countries in the CFA franc zone.[16] Long run trends of gradually declining commodity prices suggest that a commitment to stabilization and structural reform policies and to high-productivity investment will be required to sustain economic growth in the region.

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[9] United Nations Conference on Trade and Development, *Foreign Direct Investment in Africa* (New York: United Nations, 1995), pp. 37-41.

[10] Three countries, Cameroon, Congo, and Senegal, moved from the lower middle income classification to the low income classification since the Commission's first report on U.S.-Africa trade flows.

[11] These data are estimated by the World Bank. The data include all of the countries covered in this report except Eritrea. Additionally, the debt service to exports ratio is calculated on the basis of the estimated debt service actually paid and excludes arrears. See The World Bank, *World Debt Tables*, vol. 1 (Washington, DC: The World Bank, 1996), p. 170.

[12] Ibid. Nigeria is the largest borrower, with 15 percent of total debt outstanding in 1995.

[13] The World Bank, *Global Economic Prospects*, p. 76.

[14] Ibid., p. 77.

[15] Ibid., p. 64.

[16] Countries in Sub-Saharan Africa that are members of the CFA franc area include Benin, Burkina, Cameroon, Central African Republic, Chad, Congo, Côte d'Ivoire, Equatorial Guinea, Gabon, Mali, Niger, Senegal, and Togo. The CFA franc was devalued by 50 percent in Jan. 1994.

Table 1-1
Sub-Saharan Africa: Classification of economies, by income, major export category, and indebtedness

Low income[1]	**Lower middle income**	**Upper middle income**
Benin, Burkina , Burundi, Cameroon, Central African Republic, Chad, Comoros, Congo, Côte d'Ivoire, Equatorial Guinea, Eritrea, Ethiopia, Gambia, Ghana, Guinea, Guinea-Bissau, Kenya, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mozambique, Niger, Nigeria, Rwanda, São Tomé and Principe, Senegal, Sierra Leone, Somalia, Sudan, Tanzania, Togo, Uganda, Zaire, Zambia, Zimbabwe.	Angola, Botswana, Cape Verde, Djibouti, Namibia, Swaziland.	Gabon, Mauritius, Seychelles, South Africa.
Exporters of nonfuel primary products[2]	**Diversified/oil exporters**	**Exporters of services**
Botswana, Burundi, Chad, Côte d'Ivoire, Equatorial Guinea, Ghana, Guinea, Guinea-Bissau, Liberia, Madagascar, Malawi, Lesotho, Mali, Mauritania, Namibia, Niger, Rwanda, São Tomé and Principe, Somalia, Sudan, Swaziland, Tanzania, Togo, Uganda, Zaire, Zambia, Zimbabwe.	Angola,[3] Cameroon, Central African Republic, Congo,[3] Gabon,[3] Kenya, Mauritius, Nigeria,[3] Senegal, Sierra Leone, South Africa.	Benin, Burkina, Cape Verde, Comoros, Djibouti, Ethiopia, Gambia, Mozambique, Seychelles.
Severely indebted[4]	**Moderately indebted**	**Less indebted**
Angola, Burundi, Cameroon, Central African Republic, Congo, Côte d'Ivoire, Equatorial Guinea, Ethiopia, Ghana, Guinea, Guinea-Bissau, Kenya, Liberia, Madagascar, Mali, Mauritania, Mozambique, Niger, Nigeria, Rwanda, São Tomé and Principe, Sierra Leone, Somalia, Sudan, Tanzania, Togo, Uganda, Zaire, Zambia.	Benin, Chad, Cape Verde, Comoros, Gabon, Gambia, Malawi, Senegal, Zimbabwe.	Botswana, Burkina, Djibouti, Lesotho Mauritius, Namibia, Seychelles, South Africa, Swaziland.

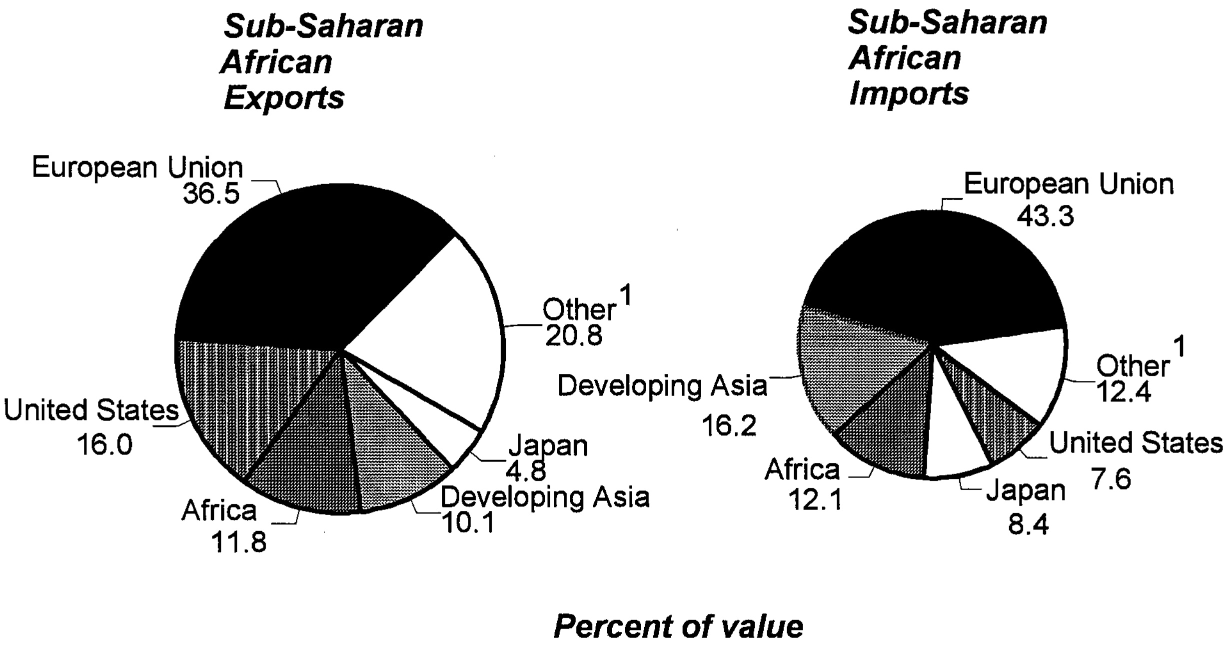
[1] Low income refers to 1994 GNP per capita of $725 or less; lower middle income to 1994 GNP per capita of $726-$2,985; and upper middle income to 1994 GNP per capita of $2,896-$8,955.
[2] Major exports are those that account for 50 percent or more of total exports of goods and services. Eritrea is not classified by export category.
[3] Indicates oil exporter.
[4] The terms "severely," "moderately," and "less indebted" refer to World Bank classifications of indebtedness that are based on the present value of debt service to GNP and on the present value of debt service to exports. Eritrea is not classified by debt category.

Source: The World Bank, *Global Economic Prospects and the Developing Countries* (Washington, DC: The World Bank, 1996).

U.S. Trade Coverage

The European Union (EU)[17] is Sub-Saharan Africa's largest trading partner, accounting for 43 percent of the region's merchandise imports and 37 percent of such exports in 1995 (figure 1-2). Other important export markets for Sub-Saharan Africa include the United States (16 percent of exports), Africa[18] (12 percent of exports), developing countries in Asia (10 percent of exports), and Japan (5 percent of exports). Important suppliers, in addition to the EU, include developing countries in Asia (16 percent of imports), Africa (12 percent of imports), Japan (8 percent of imports), and the United States (8 percent of imports).

Figure 1-2
Sub-Saharan Africa: Major trading partners, 1995



1 Other includes unsourced imports and exports.

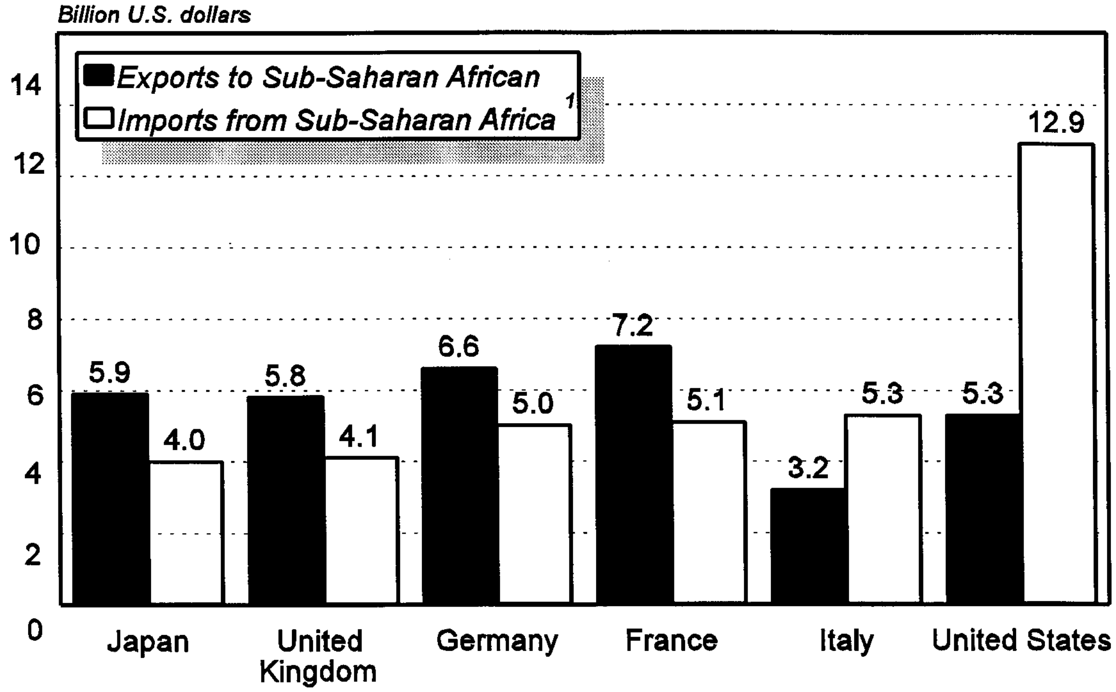
Source: Compiled by staff of the U.S. International Trade Commission from data supplied in the *Direction of Trade Statistics Yearbook*, Aug. 1996.

As shown in figure 1-3, the United States is the largest single importer of merchandise from Sub-Saharan Africa as compared to other individual countries. Other important importers include Italy, France, Germany, the United Kingdom, and Japan. In 1995, France was the largest exporter of goods to Sub-Saharan Africa, followed by Germany, Japan, the United Kingdom, the United States, and Italy.

[17] EU-15.

[18] 'Africa' in figure 1-2 refers to the 48 countries in this report plus Morocco, Tunisia, Algeria, Réunion, and St. Helena.

Figure 1-3
Sub-Saharan Africa: Exports and imports of major trading partners, 1995



1 U.S. imports are customs basis, all other countries' imports are c.i.f. basis.

Source: Compiled by staff of the U.S. International Trade Commission from the International Monetary Fund, *Direction of Trade Statistics Yearbook*, 1996 and data supplied by the U.S. Department of Commerce.

The United States consistently runs a merchandise trade deficit with Sub-Saharan Africa, which is largely due to imports of crude oil. This trade deficit amounted to $7.6 billion in 1995. South Africa is the major U.S. export market in the region, accounting for 51 percent of total U.S. exports to Sub-Saharan Africa in 1995. Four countries--Nigeria, Angola, South Africa, and Gabon--accounted for 85 percent of U.S. imports from the region in 1995. The United States, on the other hand, runs a surplus with Africa in services trade, which amounted to $866 million in 1994. South Africa is the largest market for U.S. service exports to Africa.

Major Developments in the World Trade Organization and in U.S. Trade and Economic Policy Affecting Sub-Saharan Africa

Developments in the WTO during 1995-96 centered around the implementation and administration of the Uruguay Round Agreements (URA). General institutional, organizational, and procedural matters undertaken by the WTO included the establishment of various Councils, Committees, and other bodies; the appointment of office-bearers; and the installation of procedures with respect to notification and review of commitments and policies, consultations, dispute settlement, technical cooperation and other matters. In response to concerns expressed by African countries about the possible effects of the URA on reducing the benefits enjoyed by developing countries from trade preferences granted by industrialized countries and on raising food prices, the WTO instituted an Africa Initiative in 1995 to encourage growth and diversification in Africa's international trade.[19] Nine additional countries in Sub-Saharan Africa--Benin, Burundi, Cameroon, Guinea, Madagascar, Mozambique, Niger, Rwanda, and Sierra Leone-- have joined the WTO since the last Commission report, bringing the number of countries in the region that are WTO members up to 33 (see table 3-2).

The United States operates a number of programs to facilitate U.S. trade with Sub-Saharan Africa. Certain U.S. imports from eligible Sub-Saharan African countries benefit from the U.S. Generalized System of Preferences (GSP), a program which provides duty-free treatment for eligible goods. The GSP program expired on July 31, 1995, but was renewed to May 31, 1997, in legislation that was signed into law on August 20, 1996.[20] The new legislation authorizes the President under certain conditions to extend GSP treatment to articles not previously eligible for duty-free treatment if they are the product of a least developed country. Many of the countries in Sub-Saharan Africa are categorized as least developed countries.[21]

U.S. exports to and investments in Sub-Saharan Africa benefited from programs operated by the Eximbank, OPIC, and TDA during 1995-96. Certain agricultural exports to Sub-Saharan Africa were also shipped under the Export Enhancement Program (EEP) and the GSM-102 program, as well as through food assistance programs operated by the U.S. Agency for International Development (USAID) and USDA. Additionally, at a hearing held by the House Committee on Ways and Means on August 1, 1996, proposals were made for the creation of a U.S.-Africa free-trade area similar to the Asian Pacific Economic Cooperation forum, negotiation of a U.S.-Africa free-trade area by the year 2020, new government-backed private investment funds, and immediate greater access for Sub-Saharan Africa's textiles and apparel.[22]

U.S. companies are also able to bid on contracts to supply goods and services for projects in Sub-Saharan Africa financed by the multilateral development banks (MDBs), such as the World Bank and the AfDB, as well as on projects funded by USAID. Concessional loans provided by MDBs and grants provided by USAID promote macroeconomic policy reforms and support infrastructure development and poverty alleviation in Sub-Saharan Africa. The International Development Association (IDA), an affiliate of the World Bank, is the largest source of concessional (below market rate) financing for Sub-Saharan Africa, with net disbursements of $2.7 billion[23] to the region in 1994. In March 1996 representatives of more than 30 donor countries agreed on a new funding package for the IDA of $22 billion for fiscal years 1997-99.[24] AfDB donors similarly agreed to $2.0 billion in new funding for the African Development Fund (AfDF), the

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[19] Sub-Saharan Africa's concerns regarding the URA were discussed in the Commission's first report on U.S.-Africa trade flows. See USITC, *U.S.-Africa Trade Flows and Effects of the Uruguay Round,* USITC publication 2938, pp. 1-8-1-9, and pp. 5-4-5-5.

[20] Public Law 104-188. The effective date of the legislation is Oct. 1, 1996. The extension is retroactive to Aug. 1, 1996.

[21] The Commission has been requested by the USTR to provide advice on the designation of such articles by Mar. 1997.

[22] "House Proposal Would Intensify U.S.- Sub Saharan Africa Business Connections," Comtex Scientific Corp., News Edge/LAN, Aug. 1, 1996.

[23] At 1993 prices and exchange rates. OECD, *Development Cooperation* (Paris: OECD, 1996).

[24] The World Bank, "Eleventh Replenishment of IDA and the Role of the Interim Trust Fund," found at http://www.worldbank.org/html/opr/procure/eleven.html. The new funding for IDA includes a $3.0 billion Interim Trust Fund which is funded from July 1, 1996-June 30, 1997. U.S. companies will not be able to bid on IDA projects funded through the Interim Trust Fund because the United States did not contribute to it.

AfDB's concessional lending affiliate. When combined with other AfDB resources, these new funds will make available a total of $3.0 billion for AfDB lending during 1996-1998.[25]

Increases in Sub-Saharan Africa's accumulated debt stock and debt-servicing obligations became important issues for the region and the international financial community during 1995-96.[26] The IMF and the World Bank are currently working on a special initiative to reduce the debt burden of a number of heavily indebted poor countries, most of which are in Sub-Saharan Africa. This special initiative would involve the "Paris Club" of government creditors, other bilateral creditors, the IMF, the World Bank, and other regional development banks. Debt reduction under the initiative would involve further reductions in the stock of debt owed to Paris Club and to other bilateral and commercial creditors. The IMF and the World Bank, which cannot write down the stock of debt owed to them, would provide debt-service relief.[27] During FY 1995, the United States, through the Paris Club of creditor governments, signed agreements providing debt relief to six countries in Sub-Saharan Africa.

Progress continued on a number of initiatives promoting regional integration in Sub-Saharan Africa during 1995-96. One important initiative involved progress toward a Trade Protocol by members of the Southern African Development Community (SADC) that is to be launched in 1996. Other noteworthy initiatives in the region include institutionalization of the Permanent Tripartite Commission for East African Cooperation (PTC/EAC), discussions concerning merging SADC with the Common Market for Eastern and Southern Africa (COMESA), the expansion of the Cross Border Initiative, and ongoing negotiations among the five members of the Southern African Customs Union (SACU) on a new customs union structure and revenue-sharing formula.

Organization of Study

Chapter 2 provides U.S.-Sub-Saharan Africa trade flow data for major commodity and service sectors and U.S. investment data for 1991-95. Chapter 3 provides an update of WTO activities affecting countries in Sub-Saharan Africa during 1995-96, as well as overall finance, trade, and economic developments affecting the region. Chapter 4 provides information by major sector on WTO, finance, trade, and economic developments likely affecting U.S. trade with and investment in countries in Sub-Saharan Africa. Chapter 5 provides information on progress in regional integration. A glossary of abbreviations can be found at the front of the report. Appendix B provides data on U.S. exports to and imports from Sub-Saharan Africa by country on a value basis for 1991-95 as well as other country data. ■

[25] Okolo, Paul, "ECONEWS: Africa-Bank Donors Pledge $420 million U.S. Dollars for African Bank," Africa News Service (via Comtex), June 25, 1996.

[26] The World Bank, *Global Economic Prospects* and "IMF Work Advances on Debt Initiative for the Poorest Countries," *IMF Survey*, July 15, 1996, pp. 229-234.

[27] IMF, "IMF Work Advances on Debt Initiative."

CHAPTER 2
Structure of U.S.-Sub-Saharan Africa Trade And Investment Flows, 1991-95

U.S. merchandise exports to Sub-Saharan Africa amounted to $5.3 billion in 1995, or about 1 percent of total U.S. merchandise exports of $546.5 billion[1] in that year (table 2-1). U.S. merchandise imports from Sub-Saharan Africa amounted to $12.9 billion in 1995, or about 2 percent of total U.S. merchandise imports of $739.7 billion[2] in that year. The United States consistently maintains a merchandise trade deficit with Sub-Saharan Africa, which amounted to $7.6 billion in 1995. Imports of energy-related products (primarily crude petroleum) account for the bulk of U.S. imports from Sub-Saharan Africa and are largely responsible for the U.S. trade deficit with the region.

The United States recorded a service-trade surplus with African countries of $886 million in 1994, the latest year for which data are available. The United States also recorded a surplus in affiliate transactions with Africa equal to $581 million in 1993.

U.S. Merchandise Exports

U.S. exports to Sub-Saharan Africa rose from $4.3 billion in 1994 to $5.3 billion in 1995, or by 22.1 percent, during 1994-95 (table 2-1). Transportation equipment, agricultural products,[3] and electronic products are the largest U.S. merchandise export sectors. These sectors accounted for 22.3, 17.7, and 14.3 percent, respectively, by value of U.S. merchandise exports in 1995 (figure 2-1). The increase in U.S. exports to Sub-Saharan Africa during 1994-95 was largely accounted for by higher exports of transportation equipment, chemicals and related products, agricultural products, electronic products, and minerals and metals. Minerals and metals exports to Sub-Saharan Africa experienced the largest rate of increase during 1994-95 (49.0 percent), followed by chemicals and related products (45.4 percent), and forest products (38.8 percent).

Percentage changes in U.S. exports to Sub-Saharan African countries during 1994-95 by sector are shown in table 2-2. The data in this table indicate that U.S. exports to a large number of Sub-Saharan African countries experienced increases or decreases in all sectors. The relatively large number of countries to which U.S. exports increased by rates of 100 percent or greater, and the large number of countries to which U.S. exports declined, indicates the variability that is associated with exports to countries in Sub-Saharan Africa. In some instances this variability is associated with market promotion efforts, whereas in other instances the variability is associated with transhipments of merchandise exports, the availability of financing arrangements, political developments, or, in the case of agricultural products, the food situation in a particular country.

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[1] U.S. International Trade Commission (USITC), *U.S. Trade Shifts in Selected Industries*, USITC publication 2992, Sept. 1996.

[2] Ibid.

[3] U.S. exports of agricultural products include products exported under various food assistance programs described in chapter 4.

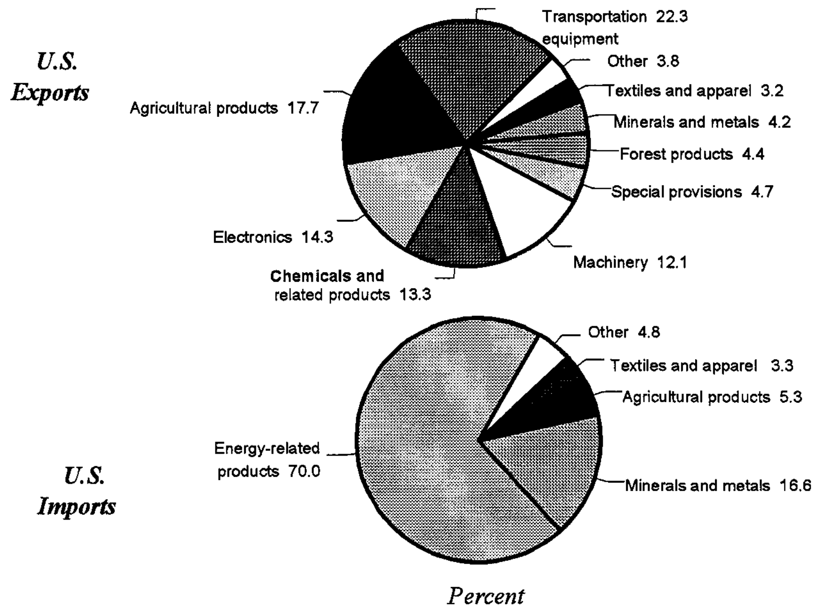
Table 2-1
Sub-Saharan Africa: U.S. exports, imports, and trade balance, by major commodity sectors, 1991-95

(Million dollars)

Item	1991	1992	1993	1994	1995
U.S. exports of domestic merchandise:					
Agricultural products	566.9	1,145.3	874.9	778.5	936.3
Forest products	161.7	165.9	176.0	170.0	235.9
Chemicals and related products	561.1	521.9	493.6	485.5	705.7
Energy-related products	127.3	119.0	125.4	113.6	149.3
Textiles and apparel	141.9	162.7	155.1	142.4	171.0
Footwear	4.2	5.2	6.6	9.9	8.7
Minerals and metals	165.4	175.1	155.0	147.8	220.2
Machinery	494.5	610.3	606.1	581.1	638.9
Transportation equipment	1,670.5	1,525.8	1,198.2	937.0	1,179.7
Electronic products	561.5	595.5	645.5	675.9	755.5
Miscellaneous manufactures	50.8	41.2	49.4	70.0	50.9
Special provisions[1]	210.0	231.9	211.2	227.0	246.8
Total	4,715.9	5,299.9	4,697.0	4,338.5	5,299.0
U.S. imports for consumption:					
Agricultural products	600.3	591.4	670.4	684.7	686.6
Forest products	70.2	68.4	65.6	74.7	100.8
Chemicals and related products	93.9	110.7	128.4	153.3	226.8
Energy-related products	8,539.2	8,980.7	9,055.8	8,421.2	9,054.6
Textiles and apparel	167.8	234.3	329.4	405.8	425.8
Footwear	1.2	2.2	4.4	3.9	1.4
Minerals and metals	2,061.2	1,929.5	1,937.8	2,055.8	2,142.5
Machinery	37.4	33.9	40.7	44.1	53.3
Transportation equipment	18.2	22.1	29.3	34.1	53.9
Electronic products	12.3	19.9	20.1	28.5	48.9
Miscellaneous manufactures	17.3	21.4	31.2	57.7	46.6
Special provisions[1]	67.8	68.7	108.8	88.2	99.2
Total	11,686.7	12,083.0	12,421.8	12,051.9	12,940.5
U.S. merchandise trade balance:					
Agricultural products	-33.4	553.9	204.5	93.8	249.7
Forest products	91.5	97.5	110.4	95.3	135.1
Chemicals and related products	467.2	411.2	365.2	332.2	478.9
Energy-related products	-8,411.8	-8,861.7	-8,930.4	-8,307.6	-8,905.3
Textiles and apparel	-25.9	-71.6	-174.3	-263.4	-254.8
Footwear	3.0	3.0	2.2	6.0	7.3
Minerals and metals	-1,895.8	-1,754.4	-1,782.8	-1,908.0	-1,922.4
Machinery	457.1	576.4	565.4	537.0	585.6
Transportation equipment	1,652.3	1,503.7	1,168.9	902.9	1,125.9
Electronic products	549.2	575.6	625.4	647.4	706.6
Miscellaneous manufactures	33.5	19.8	18.2	12.3	4.3
Special provisions[1]	142.2	163.2	102.4	138.8	147.6
Total	-6,970.8	-6,783.4	-7,724.9	-7,713.3	-7,641.5

[1] Special provisions include items not in other sectors. For imports, these items include items exported but later returned to the United States. For exports, these include charitable and relief donations and items for U.S. Government work and employee personal effects.
Note.--Due to rounding, figures may not add to the totals shown.
Source: Compiled by staff of the U.S. International Trade Commission from data supplied by the Department of Commerce.

Figure 2-1
Sub-Saharan Africa: U.S. exports to and imports from, value share by sector, 1995



Source: Compiled by staff of the U.S. International Trade Commission from data supplied by the U.S. Department of Commerce.

U.S. Merchandise Imports

U.S. imports from Sub-Saharan Africa rose from $12.1 billion in 1994 to $12.9 billion in 1995, or by 7.4 percent, during 1994-95 (table 2-1). Energy-related products and minerals and metals are the largest sectors for U.S. imports from Sub-Saharan Africa, accounting for 70.0 and 16.6 percent, respectively, by value of U.S. merchandise imports from the region in 1995 (figure 2-1). Such imports grew by 7.5 and 4.2 percent, respectively, during 1994-95. Two other sectors, agricultural products and textiles and apparel, accounted for 5.3 and 3.3 percent, respectively, of U.S. imports from Sub-Saharan Africa in 1995, with such imports growing by 0.3 percent and 4.9 percent, respectively, during this same period.

Some sectors which account for a relatively small amount of U.S. imports from Sub-Saharan Africa achieved relatively large import growth rates during 1994-95. These sectors and their growth rates include electronic products (increase of 71.3 percent), transportation equipment (57.9 percent), chemicals and related products (48.0 percent), forest products (35.0 percent), and machinery (20.9 percent).

Percentage changes in U.S. imports from Sub-Saharan African countries during 1994-95 by sector are shown in table 2-3. These data indicate that U.S. imports from individual countries in Sub-Saharan Africa tend to be highly variable, with U.S. imports from a large number of countries increasing or decreasing rates of 100 percent or greater during 1994-95. Changes in U.S. imports from countries in Sub-Saharan Africa tend to be associated with the availability of supplies of agricultural and resource-based exports and their prices, other competitive factors, as well as political developments in individual countries.

Table 2-2
Sub-Saharan Africa: U.S. exports by sector, percentage change by country, 1994-95

Sector	Increase (*Percent*)				Decrease (*Percent*)
	1-24	25-49	50-99	100 or greater	1-100
Agricultural products	Mauritius Rwanda Sierra Leone Swaziland	Ghana Madagascar Mozambique Zambia	Côte d'Ivoire Djibouti Guinea Niger Nigeria Seychelles South Africa Togo	Botswana Burkina Cape Verde Comoros* Gambia Guinea-Bissau* Malawi Mali Mauritania Nambia São Tomé Zaire Zimbabwe	Angola Benin Burundi Central African Republic* Cameroon Congo Equatorial Guinea* Eritrea Ethiopia Gabon Kenya Lesotho Liberia Senegal Somalia Sudan
Forest products	South Africa	Guinea Mozambique	Mauritius Namibia Swaziland Zaire Zambia	Botswana Cameroon Côte d'Ivoire Djibouti* Ethiopia Gambia* Ghana Kenya Liberia Mali* Nigeria Rwanda* Seychelles* Senegal Sudan*	Angola Benin* Burkina* Cape Verde* Central African Republic* Chad* Comoros* Congo Equatorial Guinea* Eritrea* Gabon Guinea-bissau* Lesotho* Madagascar Malawi Mauritania* Niger São Tomé Somalia* Sierra Leone* Tanzania Togo* Uganda
Chemicals and related products	Gabon Chad Congo Guinea Liberia Zaire	Mauritius South Africa	Angola Comoros Côte d'Ivoire Gambia Ghana Senegal Sudan Uganda Zimbabwe	Botswana Burkina* Central African Republic Ethiopia Madagascar Malawi Nigeria Rwanda Somalia Togo Zambia	Benin Burundi Cameroon Djibouti Guinea-bissau Kenya Lesotho* Mali Mauritania Mozambique Namibia Niger Seychelles Sierra Leone Swaziland Tanzania
Energy-related products	Cameroon Mozambique South Africa	Congo Mauritania Zaire	Botswana Ghana	Benin Chad* Côte d'Ivoire Djibouti Liberia Malawi* Mali* Namibia* Niger* Nigeria Tanzania Togo* Uganda* Zimbabwe*	Angola Cape Verde* Ethiopia Gabon Kenya Madagascar Mauritius São Tomé* Senegal Sierra Leone Sudan Swaziland* Zambia
Textiles and apparel	Burundi Cameroon Equatorial Guinea Gabon Ghana Kenya Mauritius Sierra Leone South Africa	Ethiopia Gambia Guinea Malawi Mozambique Senegal	Angola Benin Burkina Côte d'Ivoire Djibouti Mali Togo Zaire	Cape Verde* Central African Republic Chad* Eritrea* Lesotho* Madagascar Niger Rwanda* Seychelles* Somalia* Sudan*	Botswana* Comoros* Congo* Liberia Mauritania* Namibia Niger Nigeria Swaziland* Tanzania Uganda Zambia Zimbabwe
Footwear	Cote d'Ivoire Nigeria	Ghana	Angola Zaire	Burundi* Cameroon* Ethiopia* Gabon* Kenya Mali* Rwanda* Senegal* Tanzania Togo Uganda*	Benin Burkina* Congo* Guinea* Guinea-bissau* Liberia Madagascar* Niger* Sierra Leone South Africa Swaziland* Zambia Zimbabwe

* Denotes change from a 1994 base of less than $100,00.

Table 2-2 --Continued
Sub-Saharan Africa: U.S. exports by sector, percentage change by country, 1994-95

Sector	Increase (*Percent*)				Decrease (*Percent*)
	1-24	25-49	50-99	100 or greater	1-100
Minerals and metals	Botswana Ethiopia Guinea Mauritania South Africa Uganda	Congo Ghana	Cameroon Central African Republic Côte d'Ivoire Kenya Mauritius Nigeria Zaire	Angola Burkina* Equatorial Guinea* Gabon Gambia Mozambique Namibia* Rwanda* Senegal Sudan Tanzania Togo* Zambia	Benin Burundi* Cape Verde* Chad Djibouti* Eritrea* Liberia Madagascar Malawi Mali Niger* São Tomé Seychelles Sierra Leone Somalia* Swaziland* Zimbabwe
Machinery	Central African Republic Guinea Kenya South Africa Zaire Zambia	Cameroon Ghana Mali Mauritania Togo Zimbabwe	Angola Botswana Senegal Sudan	Benin Burkina* Congo Equatorial Guinea* Eritrea Ethiopia Namibia Seychelles Tanzania	Burundi Cape Verde Chad Côte d'Ivoire Djibouti Gabon Gambia Guineau-bissau* Lesotho* Liberia Madagascar Malawi Mauritius Mozambique Niger Nigeria Rwanda São Tomé Sierra Leone Somalia Swaziland Uganda
Transportation	Niger	Angola Cape Verde Chad Congo Ghana Guinea Mauritius Mozambique Zimbabwe	Botswana Burkina Equatorial Guinea Gabon Liberia South Africa Zaire Zambia	Benin Burundi Comoros* Côte d'Ivoire Eritrea Namibia Senegal Sudan Tanzania	Cameroon Central African Republic Djibouti Ethiopia Gambia Guinea-bissau Kenya Lesotho Madagascar Malawi Mali Mauritania Nigeria Rwanda São Tomé Seychelles Sierra Leone Somalia Swaziland Togo Uganda
Electronic products	Cape Verde Gambia Ghana Guinea Lesotho South Africa Togo	Botswana Nigeria Senegal Tanzania	Angola Equatorial Guinea Mauritius Uganda	Benin Central African Republic Chad Congo Eritrea Malawi Mali Mauritania Zaire Zambia	Burkina Burundi Cameroon Comoros* Côte d'Ivoire DjiboutiSão Ethiopia Gabon Guineau-bissau Kenya Liberia Madagascar Mozambique Namibia Niger Rwanda Tomé Seychelles Sierra Leone Somalia Swaziland Tanzania
Miscellaneous manufactures	Cameroon Congo Zimbabwe	Swaziland Zambia	Guinea Namibia Uganda	Benin* Central African Republic* Rwanda* Eritrea* Gabon Malawi* Mauritius* Mozambique* Niger Rwanda* Senegal Seychelles Sudan* Togo*	Angola Botswana Burkina* Burundi* Cape Verde* Chad* Comoros* Côte d'Ivoire Djibouti* Ethiopia Gambia* Ghana Guinea-bissau* Kenya Liberia Madagascar Mali São Tomé Sierra Leone Somalia South Africa Tanzania Zaire

* Denotes change from a 1994 base of less than $100,000.

Source: Compiled by staff of the U.S. International Trade Commission on the basis of Department of Commerce data.

Table 2-3
Sub-Saharan Africa: U.S. imports by sector, percentage change by country, 1994-95

Sector	Increase (*Percent*)				Decrease (*Percent*)
	1-24	25-49	50-99	100 or greater	1-100
Agricultural products	Côte d'Ivoire Guinea Mauritius Mozambique South Africa		Benin Gambia	Burundi Cameroon Cape Verde* Central African Republic* Chad Eritrea* Ghana Rwanda Sierra Leone Tanzania Zaire	Botswana Comoros Congo* Djibouti* Ethiopia Gabon Kenya Liberia* Madagascar Malawi Mali Namibia Niger Nigeria Senegal Seychelles Somalia Sudan Swaziland Togo Uganda Zambia Zimbabwe
Forest products	Gabon Nigeria Tanzania South Africa	São Tomé Zambia Zimbabwe	Cameroon Ghana Zaire	Angola* Botswana* Central African Republic* Congo* Equatorial Guinea* Eritrea* Gambia* Guinea-bissau* Madagascar Malawi* Mauritius Namibia Swaziland	Benin* Burkina* Burundi* Côte d'Ivoire* Ethiopia* Guinea* Kenya Liberia* Mali Mozambique* Niger* Rwanda* Senegal* Seychelles* Sierra Leone* Togo* Uganda
Chemicals and related products	Gabon South Africa	Côte d'Ivoire	Cameroon Liberia Mali Sudan	Angola* Botswana* Cape Verde* Comoros Congo* Eritrea* Ethiopia Gambia* Ghana Guinea* Mauritius Mozambique* Niger* Nigeria Senegal Swaziland Togo* Zambia Uganda	Benin* Djibouti* Equatorial Guinea* Kenya Lesotho* Madagascar Nambia* São Tomé* Seychelles Sierra Leone Somalia* Tanzania Zaire Zimbabwe
Energy-related products	Angola Nigeria Zimbabwe	Gabon South Africa Zaire		Chad* Equatorial Guinea* Mozambique* Togo*	Benin Cameroon Congo Côte d'Ivoire Ghana Kenya Liberia Mauritania Namibia Niger Senegal Swaziland
Textiles and apparel	Mauritius	South Africa Zimbabwe	Ghana Nigeria Seychelles Zaire	Botswana Burundi* Cape Verde* Chad Equatorial Guinea* Eritrea* Guinea* Madagascar Mali São Tomé* Senegal* Sierra Leone* Somalia* Sudan* Uganda*	Benin Burkina* Cameroon Central African Republic* Comoros* Côte d'Ivoire Ethiopia Gabon* Gambia Kenya Lesotho Malawi Mauritania* Mozambique Nambia Niger Swaziland Tanzania Togo Zambia
Footwear	Zimbabwe		Cameroon	Botswana* Kenya* Mauritius* Nigeria* Sierra Leone*	Burkina Côte d'Ivoire Ethiopia* Ghana* Kenya Namibia* Somalia* South Africa Zimbabwe

* Denotes change from a 1994 base of less than $100,000.

Table 2-3--Continued
Sub-Saharan Africa: U.S. imports by sector, percentage change by country, 1994-95

Sector	Increase (*Percent*)				Decrease (*Percent*)
	1-24	25-49	50-99	100 or greater	1-100
Minerals and metals	Botswana Guinea Madagascar South Africa	Tanzania	Zimbabwe	Cameroon Central African Republic* Chad* Côte d'Ivoire Ethiopia* Gambia Liberia Malawi* Mauritania* Mozambique Nigeria Seychelles* Somalia* Uganda Zaire	Angola Burkina* Burundi Chad* Djibouti* Gabon Ghana Kenya Mali Namibia Niger* Namibia Senegal* Sierra Leone Swaziland Togo* Zambia
Machinery	Côte d'Ivoire	South Africa	Kenya Mauritius	Angola* Burkina* Equatoria Guinea* Gambia* Ghana* Zaire* Liberia* Mali* Nigeria* Seychelles* Somalia* Guinea*	Botswana* Cameroon* Cape Verde* Côte d'Ivoire Ethiopia* Gabon Kenya Niger Seychelles* Sierra Leone Zimbabwe
Transportation	São Tomé Sierra Leone Zimbabwe	Kenya Mauritius	South Africa	Botswana* Burkina* Guinea* Madagascar* Swaziland*	Angola* Cameroon* Congo* Côte d'Ivoire* Ethiopia* Gambia* Ghana* Liberia* Mali* Namibia Niger Nigeria Senegal* Sierra Leone Somalia* Sudan* Uganda* Zaire
Electronic products		Angola Equatorial Guinea Mauritius Nigeria São Tomé* South Africa Swaziland	Burkina Cape Verde Gambia	Congo* Côte d'Ivoire Djibouti Eritrea* Guinea Kenya Malawi* Mali Mozambique Niger* Senegal Sierra Leone* Sudan* Tanzania* Zambia Zimbabwe	Cameroon Ethiopia* Gabon* Ghana* Liberia Mauritania* Namibia Rwanda* Seychelles Somalia* Togo* Zaire*
Miscellaneous manufactures	Guinea Congo Uganda	Burkina Malawi Niger Zimbabwe	Ghana Mauritius Sierra Leone	Botswana* Central African Republic* Djibouti* Liberia* Seychelles* Somalia* Swaziland Tanzania Togo	Angola Benin* Burundi* Cameroon Cape Verde* Central African Republic Chad* Côte d'Ivoire Equatorial Guinea* Eritrea* Ethiopia* Gabon Kenya Lesotho* Madagascar Mali Mauritania* Mozambique Namibia* Nigeria Rwanda* Senegal Sudan Zaire

* Denotes change from a 1994 base of less than $100,000.

Source: Compiled by staff of the U.S. International Trade Commission on the basis of Department of Commerce data.

U.S. Merchandise Trade Balance

The U.S. merchandise trade balance with Sub-Saharan Africa was consistently negative during 1991-95 (table 2-1). The trade deficit in the energy-related products sector, which increased during 1994-95, largely accounts for the overall U.S. trade deficit with the region. Other merchandise trade sectors in which the United States has consistently run a trade deficit include textiles and apparel and minerals and metals. In sectors where the United States traditionally has a trade surplus with Sub-Saharan Africa, such as agricultural products, forest products, chemicals and related products, footwear, machinery, transportation equipment, and electronic products, such trade surpluses increased during 1994-95.

Trade in Major Commodities

The major U.S. commodity exports to and imports from Sub-Saharan Africa are shown at the six-digit level in tables 2-4 and 2-5. In 1995, wheat was the largest single U.S. export to Sub-Saharan Africa, followed by parts for boring or sinking machinery, parts of airplanes or helicopters, corn, and used clothing.

Crude oil was the largest U.S. import from Sub-Saharan Africa in 1995, accounting for $8.6 billion, or 66.6 percent, of U.S. imports from the region in that year. Other important U.S. imports include platinum, oil (not crude), diamonds, cocoa beans, men's or boys' shirts made from cotton, and ash and residues. Excluding men's or boys' shirts made from cotton and cocoa beans, which are not produced in the United States, imports of these commodities reflect a shortage of reserves in the United States and insufficient production for meeting U.S. domestic demand.

Major Trading Countries

Led by increases in the agricultural product, transportation, and chemicals and related product sectors, U.S. exports to South Africa, the largest U.S. export market in Sub-Saharan Africa, increased from $2.1 billion to $2.7 billion during 1994-95, or by 27.5 percent (table 2-6). South Africa's share of U.S. exports to the region increased from 48.7 percent in 1994 to 50.9 percent in 1995 (figure 2-2).[4] U.S. exports to Nigeria, the second-leading U.S. market in Sub-Saharan Africa, rose from $500.6 million in 1994 to $589.7 million in 1995, or by 17.7 percent, led by higher exports of agricultural products, chemicals and related products, energy-related products, and forest products. Increased exports in the transportation and minerals and metals sectors similarly contributed to a 31.6 percent increase in U.S. exports to Angola, the third-largest U.S. market in Sub-Saharan Africa. Other important U.S. markets in Sub-Saharan Africa and the growth rates of U.S. exports to these markets during 1994-95 include Côte d'Ivoire (56.5 percent), Ghana (37.3 percent), Ethiopia (3.1 percent), and Zimbabwe (30.4 percent).

[4] Value shares for U.S. export markets in Sub-Saharan Africa for 1994 were provided in USITC, *U.S.-Africa Trade Flows and Effects of the Uruguay Round Agreements and U.S. Trade and Development Policy*, USITC publication 2938, Jan. 1996.

Table 2-4
Sub-Saharan Africa: Value of U.S. exports, by major commodity items, 1991-95

(Million dollars)

Schedule B commodity		1991	1992	1993	1994	1995
	Total of items shown	1,561	2,135	1,737	1,674	2,182
100190	Wheat (other than durum wheat), and meslin	94	136	297	245	296
843143	Parts for boring or sinking machinery, nesoi[1]	333	333	258	221	262
880330	Parts of airplanes or helicopters, nesoi	173	129	96	114	127
100590	Corn (maize), other than seed corn	33	603	142	53	109
630900	Worn clothing and other worn textile articles	53	72	67	56	81
870410	Dumpers designed for off-highway use	35	38	27	50	77
890520	Floating or submersible drilling or production, platform	72	29	51	11	74
847330	Parts & accessories for ADP machines & units	47	52	58	61	73
100630	Rice, semi- or wholly milled, polished etc or not	125	114	92	98	72
843149	Parts and attachments nesoi for derricks etc	55	36	42	52	66
240220	Cigarettes containing tobacco	33	25	22	24	55
852490	Recording media for sound	20	24	38	55	54
870899	Parts and accessories of motor vehicles nesoi	30	32	32	29	53
880230	Airplane & a/c unladen wght > 2000, nov 15000 kg	35	72	51	56	51
870130	Track-laying tractors	19	19	14	23	47
310000	Fertilizers exports only incl other crude mat'ls	29	22	35	26	45
150790	Soybean oil, refine, and fractions, not modified	28	29	35	56	45
847191	Digital process unit with storage, input output un	28	44	39	40	45
847199	Adp mach & unit; magntc//ptcl readers etc, neso	6	10	28	26	42
270112	Bituminous coal, not agglomerated	12	20	28	29	37
290250	Styrene	11	10	11	22	35
870190	Tractors, nesoi	18	17	29	38	35
480411	Kraftliner, uncoated unbleached in rolls or sheets	14	15	15	12	35
847192	Input or output units for ADP machines	25	20	18	25	35
271000	Oil (not crude) from petroleum and bituminous mineral etc	19	30	42	16	35
071339	Beans nesoi, dried shelled, including seed	13	9	11	38	33
852520	Transmission appr incorporating reception apparats	26	34	39	30	32
730420	Casing etc. for oil & gas drill, iron nesoi & steel	21	20	4	8	31
481131	Paper nesoi, ov150g/m2, bleach, impr or last covr	2	([2])	4	24	30
843139	Parts for lifting, handlng, loading/unloading machinery nesoi	27	35	27	26	30
150200	Fats, bovine, sheep or goat, raw or rendered	28	19	14	19	29
381121	Additive for lub oil cont petro/bituminous minoil	39	29	20	33	29
271312	Petroleum coke, calcined	29	15	13	17	28
290531	Ethylene glycol (ethanediol)	12	14	10	13	27
870323	Pass veh spk-ig int com rcpt p eng >1500 nov 3m cc	18	28	27	24	26

[1] Not elsewhere specified or included.
[2] Less than $500,000.

Note.--Due to rounding, figures may not add to the totals shown.

Source: Compiled by staff of the U.S. International Trade Commission from official statistics of the U.S. Department of Commerce.

Table 2-5
Sub-Saharan Africa: Value of U.S. imports for consumption, by major commodity items, 1991-95

(Million dollars)

HTS commodity		1991	1992	1993	1994	1995
	Total of items shown	10,756	11,007	11,170	10,793	11,574
270900	Crude oil from petroleum and bituminous	8,317	8,751	8,617	7,987	8,614
711011	Platinum, unwrought or powder	443	395	389	498	597
271000	Oil (not crude) from petroleum and bituminous	196	192	400	397	325
710231	Diamonds, nonindustrial, unworked	184	183	236	264	285
180100	Cocoa beans, whole or broken, raw or roasted	211	128	165	123	174
620520	Men's or boys' shirts, not knit, of cotton	20	31	74	114	122
262090	Ash and residues nesoi, containing metals	86	133	124	142	121
711021	Palladium, unwrought or in powder form	39	46	74	97	108
090111	Coffee, not roasted, not decaffeinated	49	60	53	94	94
260600	Aluminum ores and concentrates	117	92	96	88	88
711031	Rhodium, unwrought or in powder form	364	188	94	85	83
720241	Ferrochromium over 4 percent carbon	91	72	39	29	83
620342	Men's or boys' trousers etc, not knit, cotton	37	46	63	76	74
810510	Cobalt, unwrought	80	101	61	85	72
710239	Diamonds, nonindustrial, worked	28	35	50	70	58
720230	Ferrosilicon manganese	32	31	26	45	53
470200	Chemical woodpulp, dissolving grades	51	47	36	32	50
170111	Cane sugar, raw, solid form, w/o added	56	39	37	71	49
720211	Ferromanganese with over 2 percent carbon	40	33	52	47	49
261400	Titanium ores and concentrates	53	49	75	54	46
611020	Sweaters, pullovers etc, knit etc, cotton	29	39	39	41	39
750210	Nickel, unwrought, not alloyed	30	28	33	43	36
400122	Technically specified natural rubber	25	29	23	24	36
240120	Tobacco, partly or wholly stemmed/stripped	48	103	142	64	36
620462	Women's or girls' trousers etc not knit, cotton	13	23	31	33	35
090500	Vanilla beans	45	45	42	40	34
271129	Petroleum gases etc., in gaseous state, nesoi	0	0	0	0	33
271311	Petroleum coke, not calcined	0	0	0	0	33
261800	Granulated slag fr iron or steel manufacture	0	0	2	10	25
260200	Manganese ores and concentrates	31	21	16	23	23
410790	Leather of animals nesoi, without hair on	9	12	16	27	22
130214	Vegetable sap & extract of pyrethrum	21	16	17	22	21
721049	Flat-rolled products of iron or nonalloy steel	0	22	28	27	20
030341	Albacore/longfinned tunas ex fillet/lvr/roe	2	10	15	16	19
130120	Gum arabic	12	8	6	25	19

Note.--Due to rounding, figures may not add to the totals shown.

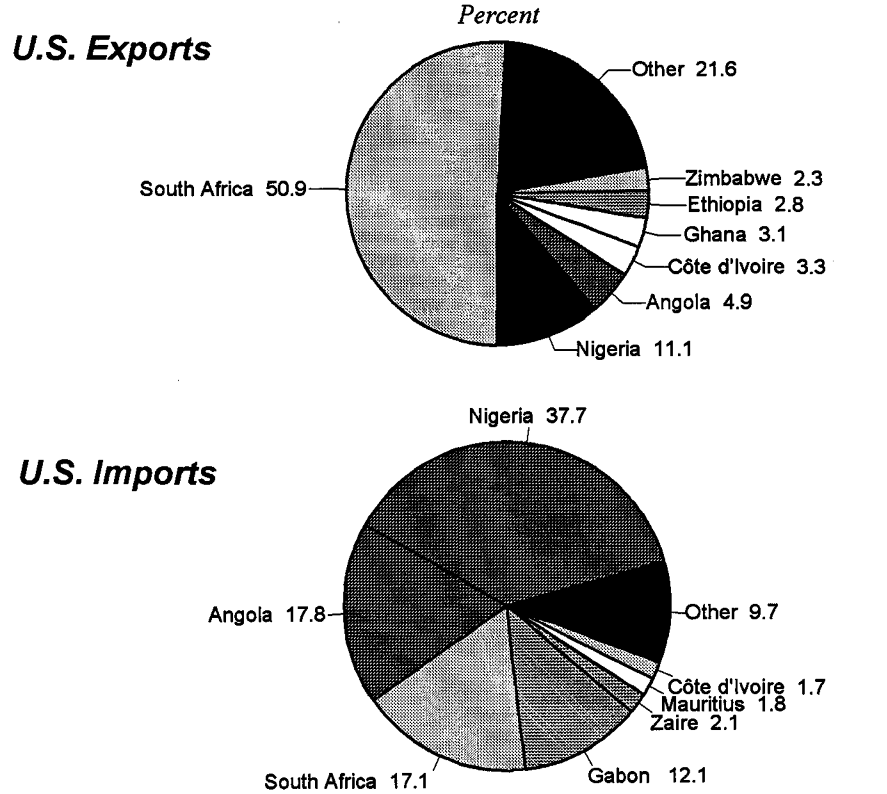
Source: Compiled by staff of the U.S. International Trade Commission from official statistics of the U.S. Department of Commerce.

Table 2-6
Sub-Saharan Africa: Major U.S. export markets, 1991-95
(Million dollars)

Country	1991	1992	1993	1994	1995
South Africa	2,060.5	2,383.3	2,144.5	2,114.9	2,696.5
Nigeria	824.1	980.2	875.2	500.6	589.7
Angola	186.8	155.3	167.5	196.7	258.8
Côte d'Ivoire	79.4	86.4	87.7	110.1	172.3
Ghana	140.7	119.7	211.3	121.4	166.7
Ethiopia	210.0	249.3	136.1	142.4	146.8
Zimbabwe	52.7	142.2	83.1	92.2	120.2
Kenya	91.0	123.0	115.5	168.5	112.6
Zaire	61.2	32.3	35.1	39.4	76.8
Senegal	75.8	76.8	68.9	42.2	67.1
Guinea	85.1	59.9	57.3	47.3	66.3
Tanzania	32.5	30.8	32.8	48.8	66.1
Congo	43.1	59.4	27.4	37.9	54.4
Gabon	84.3	54.7	47.4	40.1	53.9
Mozambique	100.9	149.6	39.4	39.3	49.0
All other countries	587.8	597.0	567.8	596.7	601.7
Total	4,715.9	5,299.9	4,697.0	4,338.5	5,299.0

Note.--Due to rounding, figures may not add to the totals shown.

Figure 2-2
Sub-Saharan Africa: U.S. major trading partners, value shares, 1995



Source: Compiled by staff of the U.S. International Trade Commission from data supplied by the U.S. Department of Commerce.

Major import suppliers from Sub-Saharan Africa include Nigeria, Angola, South Africa, and Gabon (table 2-7 and figure 2-2). These four countries accounted for 84.7 percent of U.S. imports from Sub-Saharan Africa in 1995, up from 82.4 percent in 1994.[5] Imports from Gabon experienced the largest increase, 26.8 percent, during 1994-95, followed by imports from Angola (10.9 percent), South Africa (9.4 percent), and Nigeria (6.2 percent). Imports from Gabon, Angola, and Nigeria are largely concentrated in the energy-related products sector, particularly in crude oil which accounted for 93 to 98 percent of U.S. imports from these countries in 1995. Imports from South Africa are diversified across a large number of sectors.

U.S. Imports Under the Generalized System of Preferences

The U.S. Generalized System of Preferences (GSP) provides duty-free treatment for imports of eligible articles from developing countries to promote economic development through trade. To participate in this program, a country must be designated as eligible for GSP benefits, and the products imported must be eligible for the program. During 1995, the United States imported GSP-eligible items from 34 countries in Sub-Saharan Africa.[6] Most products in the energy-related products sector, the largest sector for total U.S. imports from Sub-Saharan Africa, and most textiles and apparel and footwear are not eligible for GSP treatment.

The GSP program expired on July 31, 1995, with the result that GSP-eligible imports were subject to column 1 general rates of duty after that date. Legislation signed by the President on August 20, 1996, reauthorized the program retroactively from August 1, 1995 and extended it through May 1997.[7] The legislation also authorizes the U.S. Department of the Treasury to reimburse eligible importers for duties paid on GSP-eligible products since August 1, 1995. The impact of the uncertainty related to reauthorization of the GSP program on U.S. imports from Sub-Saharan Africa during the latter part of 1995 is not clear. In the case of Botswana, information provided by the U.S. Embassy indicates that expiration of the program undermined the competitiveness of certain firms in Botswana in selling goods in the U.S. market.[8]

Imports from Sub-Saharan Africa entering under GSP rose from $328.6 million in 1994 to $488.8 million in 1995, or by 48.7 percent (table 2-8). Such imports rose to 3.8 percent by value of total U.S. imports from the region in 1995, up from 2.7 percent in 1994.[9] The increase in imports under GSP from Sub-Saharan Africa during 1994-95 was largely due to higher imports from South Africa, which became eligible for the program in May 1994. Imports from South Africa entering under GSP rose from $181.2 million in 1994 to $357.0 million in 1995, or by 97.0 percent, and amounted to 73.1 percent of GSP imports from the region

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[5] Ibid. for value shares for U.S. imports from Sub-Saharan African countries in 1994.

[6] Fourteen countries in Sub-Saharan Africa did not export any products to the United States under GSP in 1995: Cape Verde, Chad, Congo, Equatorial Guinea, Eritrea, Gabon, Guinea-Bissau, Liberia, Mauritania, Nigeria, Rwanda, São Tomé and Principe, Somalia, and Sudan. Among these countries, Liberia, Mauritania, and Sudan are beneficiary countries that have been suspended from eligibility due to the President's determination that these countries were not affording internationally recognized worker rights. Nigeria, Gabon, and Eritrea are not beneficiary countries.

[7] Public Law 104-88.

[8] U.S. Department of State cable "USITC Study on Africa Trade Flows," message reference No. 003450, prepared by U.S. Embassy, Gaborone, Aug. 1, 1996. This message specifically indicates that certain gold jewelry makers reported difficulties in competing with Mexican firms for U.S. sales.

[9] Total U.S. imports under GSP in 1995 amounted to $18.3 billion in 1995. See USITC, *The Year in Trade: Operation of the Trade Agreements Program*, USITC publication 2971, Aug. 1996, p. 5-19.

Table 2-7
Sub-Saharan Africa: Major U.S. import suppliers, 1991-95

(Million dollars)

Country	1991	1992	1993	1994	1995
Nigeria	5,373.7	5,071.2	5,309.4	4,595.2	4,878.5
Angola	1,784.8	2,275.3	2,101.0	2,079.2	2,304.9
South Africa	1,729.0	1,719.9	1,851.0	2,019.7	2,209.6
Gabon	711.6	927.9	922.7	1,232.7	1,563.9
Zaire	302.2	249.7	240.7	187.0	267.4
Mauritius	131.4	136.8	196.4	216.8	229.6
Côte d'Ivoire	217.6	187.5	178.2	185.3	214.1
Ghana	151.6	96.4	208.5	198.5	196.1
Congo	409.6	509.8	500.0	403.0	193.5
Kenya	73.8	73.3	92.3	111.0	101.4
Zimbabwe	77.4	130.2	142.3	106.0	96.7
Guinea	123.7	101.4	113.0	92.8	93.1
Lesotho	27.2	52.4	55.7	62.7	61.9
Cameroon	125.7	82.3	101.2	56.3	57.6
Madagascar	46.6	53.5	42.7	56.7	57.2
All other countries	400.8	415.4	366.6	448.7	415.1
Total	11,686.7	12,083.0	12,421.8	12,051.9	12,940.5

Note.--Due to rounding, figures may not add to the totals shown.

Source: Compiled by staff of the U.S. International Trade Commission from data supplied by the U.S. Department of Commerce.

in 1995 (table 2-9). Imports under GSP from South Africa are diversified across a number of product sectors, with imports in the minerals and metals sector accounting for 52.2 percent of such imports in 1995.

Other important Sub-Saharan African suppliers under GSP in 1995 included Zimbabwe, Mozambique, Swaziland, Mauritius, and Côte d'Ivoire (table 2-9). Imports under GSP from Zimbabwe and Mozambique rose by 28.4 and 17.1 percent, respectively, while such imports from the other top suppliers fell during 1994-95.

Data in table 2-8 indicate that minerals and metals and agricultural products are the largest sectors for GSP imports, accounting for 45.4 and 16.7 percent, respectively, of such imports from Sub-Saharan Africa in 1995. Imports of ferroalloys accounted for 74.9 percent of imports entering under GSP in the minerals and metals sector in 1995, whereas four commodities--cane sugar, leather, cocoa paste, and seeds of flowering plants--accounted for 84.3 percent of the imports of agricultural products. During 1994-95, GSP imports in the largest sector, minerals and metals, grew by 90.1 percent, while such imports in the agricultural products sector fell by 24.2 percent, due largely to a decline in imports of cane sugar. Imports entering under GSP in two fast growing sectors, transportation and chemicals and related products, rose by 142.0 and 100.1 percent, respectively.

Imports under GSP have accounted for significant percentages of U.S. imports from Sub-Saharan Africa in certain sectors despite their low share in total imports from the region. For example, in 1995, imports of machinery under GSP accounted for 73.3 percent of sector imports, while imports of miscellaneous

Table 2-8
Sub-Saharan Africa: U.S. imports under the Generalized System of Preferences, value and share of imports, by sectors, 1991-95

GSP imports	1991	1992	1993	1994	1995
			Million dollars		
Agricultural products	79.0	41.4	50.7	107.5	81.5
Forest products	2.1	3.1	4.0	11.4	13.4
Chemicals and related products	1.0	1.3	1.4	30.1	60.5
Textiles and apparel	0.2	1.0	0.6	2.1	3.2
Footwear	0.0	0.1	0.0	0.1	0.1
Minerals and metals	7.1	30.8	59.1	116.6	221.7
Machinery	([1])	0.6	0.2	21.5	39.1
Transportation equipment	([1])	0.0	1.2	11.9	28.8
Electronic products	3.8	4.1	5.3	7.7	12.2
Miscellaneous manufactures	4.5	7.7	16.1	19.8	28.4
Total	97.8	90.1	138.5	328.6	488.8
			Percent		
Agricultural products	13.17	6.99	7.56	15.70	11.87
Forest products	3.03	4.61	6.16	15.28	13.31
Chemicals and related products	1.06	1.14	1.05	19.67	26.65
Textiles and apparel	0.10	0.43	0.18	0.51	0.74
Footwear	0.00	3.03	0.00	2.94	4.19
Minerals and metals	0.34	1.60	3.05	5.67	10.35
Machinery	0.09	1.75	0.41	48.66	73.29
Transportation equipment	0.02	0.00	3.96	34.94	53.44
Electronic products	30.79	20.87	26.23	26.91	24.89
Miscellaneous manufactures	26.11	36.12	51.78	34.27	60.96
Total GSP imports	0.84	0.75	1.12	2.73	3.78

[1] Less than $50,000.

Note.--Due to rounding, figures may not add to the totals shown.

Source: Compiled by staff of the U.S. International Trade Commission from data supplied by the U.S. Department of Commerce.

Table 2-9
Sub-Saharan Africa: Major U.S. import suppliers under the Generalized System of Preferences, 1991-95

(Million dollars)

Country	1991	1992	1993	1994	1995
South Africa	0.0	0.0	0.0	181.2	357.0
Zimbabwe	10.0	15.7	35.3	40.2	51.6
Mozambique	9.9	7.4	0.1	17.2	20.1
Swaziland	19.4	8.8	8.7	19.4	10.9
Mauritius	19.7	7.4	18.2	15.7	10.5
Côte d'Ivoire	12.1	6.5	13.5	10.7	7.9
Madagascar	3.6	6.2	1.3	7.8	6.7
Kenya	5.4	5.0	7.2	9.1	6.6
Cameroon	3.6	1.2	3.2	1.4	2.3
Botswana	0.7	0.4	0.8	0.5	2.1
All other countries	13.4	31.5	50.2	25.4	13.0
Total	97.8	90.1	138.5	328.6	488.8

Note.--Due to rounding, figures may not add to the totals shown.

Source: Compiled by staff of the U.S. International Trade Commission from data supplied by the U.S. Department of Commerce.

manufactures and transportation equipment accounted for 60.9 and 53.4 percent, respectively, of sector imports from the region under the program.

Average Tariffs and Dutiable Values

Average trade-weighted tariffs on U.S. imports from Sub-Saharan Africa in 1994 and 1995 are shown in figure 2-3. The overall average trade-weighted tariff for all U.S. merchandise imports from Sub-Saharan Africa was 1.7 percent ad valorem equivalent (AVE) in 1995, down from 1.9 percent in 1994. The highest average tariffs on U.S. dutiable imports in 1995 were on textiles and apparel (17.8 percent AVE), footwear (10.5 percent AVE), agricultural products (8.2 percent AVE), and chemicals and related products (6.5 percent AVE). The lowest average trade-weighted tariffs in 1995 were on energy-related products (0.62 percent AVE), machinery (2.9 percent AVE), and transportation equipment (3.4 percent AVE). Changes in the sector average trade-weighted tariffs during 1994-95 reflect changes in the mix of products imported by the United States from Sub-Saharan Africa in each sector as well as reductions in tariffs enacted under the Uruguay Round.

In 1995, 67.0 percent of the value of U.S. imports from Sub-Saharan Africa was subject to import duties, down from 69.2 percent in 1994 (figure 2-4).[10] Imports of energy-related products accounted for 90.7 percent of these dutiable imports in 1995. Excluding energy-related products, dutiable imports accounted for 20.7 percent of the remaining imports from Sub-Saharan Africa. Most of the imports in the textiles and apparel, footwear, and energy-related product sectors are dutiable, whereas the shares of dutiable imports in other sectors ranged from 2.0 percent (forest products) to 42.2 percent (electronic products).

Antidumping and Countervailing Duty Actions

Imports from Sub-Saharan African countries are currently the subject of three antidumping duty orders. The antidumping duty orders apply to importers of furfuryl alcohol from South Africa,[11] low-fuming brazing copper rod and wire from South Africa,[12] and carnations from Kenya.[13] A countervailing duty order issued by the Department of Commerce (Commerce) on imports of carbon steel wire rod from Zimbabwe[14] was revoked by Commerce in September 1995[15] following a negative injury investigation by the International Trade Commission (Commission).[16]

Imports of standard carbon steel pipe from South Africa were involved in an ongoing antidumping investigation during 1995 and 1996. The Commission made an affirmative preliminary injury determination in that investigation in June 1995;[17] Commerce made its preliminary antidumping determination on

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[10] Data in figure 2-4 do not include the value of imports under the GSP program on which duties were paid following the expiration of the program on July 31, 1996.

[11] For notice of the order, see 60 F.R. 32302 (June 21, 1995).

[12] For notice of the order, see 51 F.R. 3640 (Jan. 29, 1986).

[13] For notice of the order, see 52 F.R. 13490 (Apr. 23, 1987).

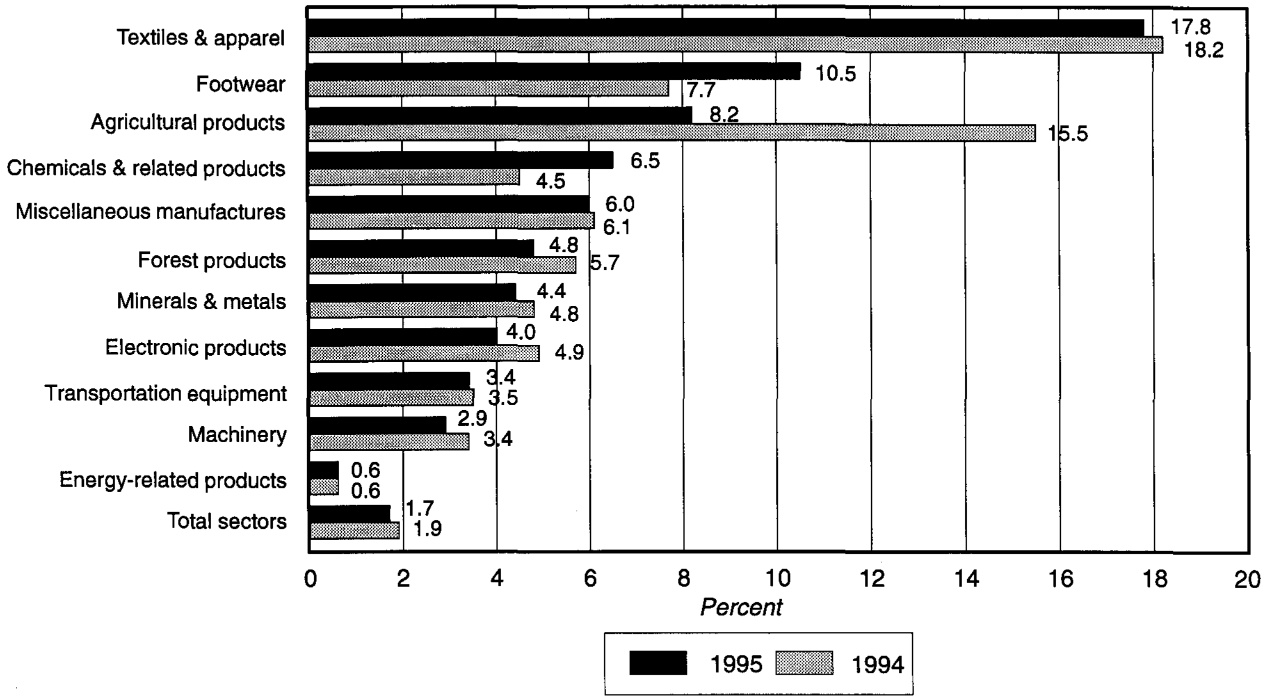
[14] For notice of the order, see 51 F.R. 29292 (Aug. 15, 1986).

[15] For notice of the order, see 60 F.R. 50553 (Sept. 29, 1995).

[16] Commission inv. No. 753-TA-32, *Carbon Steel Wire Rod from Zimbabwe*; notice of the Commission's investigation determination was published in the *Federal Register* of Sept. 27, 1995 (60 F.R. 49857).

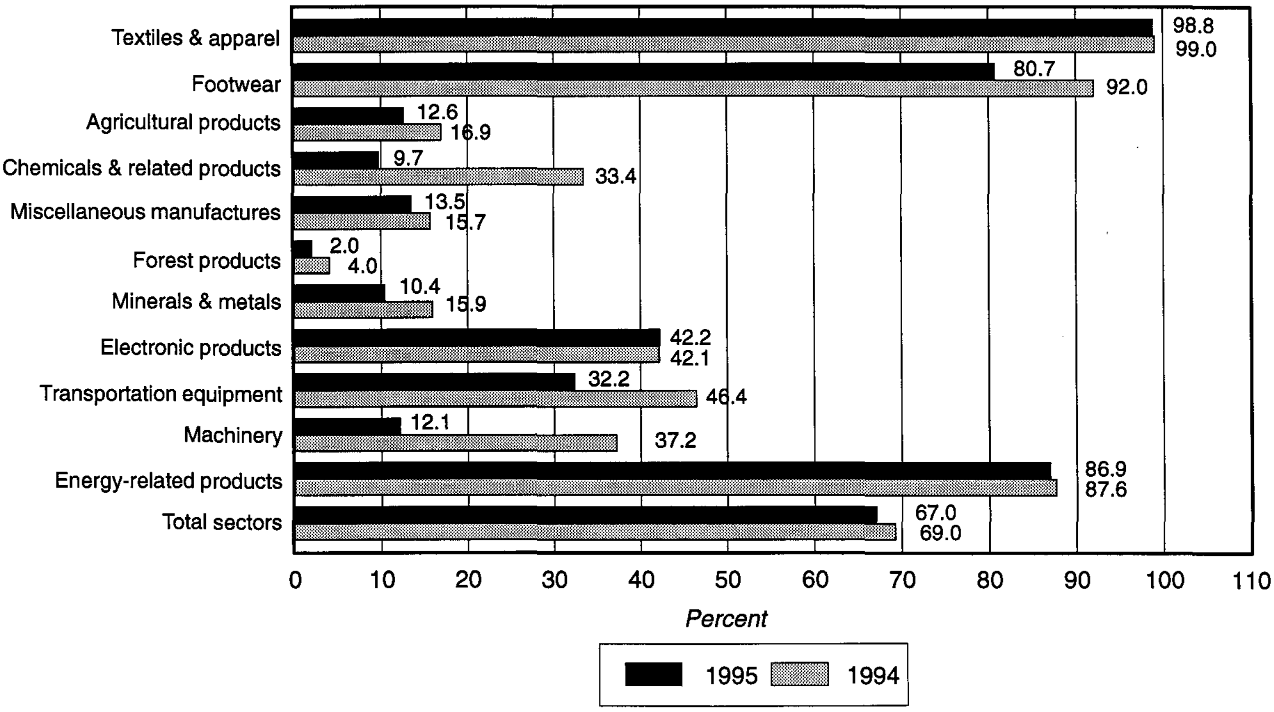
[17] Notice of the Commission's preliminary investigation determination was published in the *Federal Register* of June 28, 1995 (60 F.R. 33428).

Figure 2-3
Sub-Saharan Africa: U.S. trade-weighted average tariffs by dutiable value, by sectors, 1994-1995



Source: Compiled by staff of the U.S. International Trade Commission from data supplied by the U.S. Department of Commerce.

Figure 2-4
Sub-Saharan Africa: U.S. dutiable imports by share of sector imports, 1994-1995



Source: Compiled by staff of the U.S. International Trade Commission from data supplied by the U.S. Department of Commerce.

November 30, 1995.[18] However, on June 18, 1996, the Commission made a negative final injury determination and no antidumping duty order was issued.[19]

U.S.-Africa Services Trade

International transactions in services are conducted in two ways. First, services may be sold by a firm in one country to consumers in another, with people, information, or money crossing national borders. These are referred to as "cross-border transactions" and they appear explicitly as imports and exports in the balance of payments. Second, services may also be provided to foreign consumers through affiliates established abroad. These are referred to as "affiliate transactions" and the income generated by such affiliates appears as investment income in the balance of payments.

Data pertaining to U.S. trade in services with Sub-Saharan Africa are limited. There is a paucity of country-specific detail and a pronounced time lag in terms of data availability. Country-specific detail on cross-border transactions is limited to the United States' largest trading partner in the region, South Africa. Beyond this, data on cross-border transactions are available only for the continent of Africa. The latest year for which cross-border services trade data are available for South Africa and the African continent is 1994.

Country-specific detail regarding sales by African affiliates of U.S. firms is limited to South Africa and Nigeria, and the data series available extends only through 1993. Country-specific information pertaining to sales by U.S.-based affiliates of African firms is available only for South Africa.

Cross-border Transactions

U.S. cross-border exports of services to Africa amounted to $1.3 billion in 1994, accounting for less than 1 percent of total U.S. cross-border service exports (figure 2-5, table 2-10). During 1991-94, U.S. cross-border service exports to Africa increased by an average of 4 percent per year. At $401 million, U.S. cross-border service imports from Africa were also relatively small, accounting for less than 1 percent of all U.S. service imports (table 2-11). Cross-border service imports from Africa increased by an annual average of 8 percent during 1991-94. During 1993-94, the cross-border trade surplus with Africa decreased by 8 percent, from $965 million to $886 million, due principally to increased U.S. imports of telecommunication and professional services and decreased U.S. exports of education services.

In 1994, professional services and education services[20] accounted for 69 percent of total U.S. cross-border service exports to the African continent. Telecommunication services accounted for 55 percent of total cross-border imports of services from Africa. The United States records relatively large imports of telecommunication services from Africa because most calls between the United States and Africa originate in the United States, whose carriers collect fees for the calls and subsequently divide these receipts with African carriers. Since payments are made to foreign carriers, these transactions are recorded as imports.

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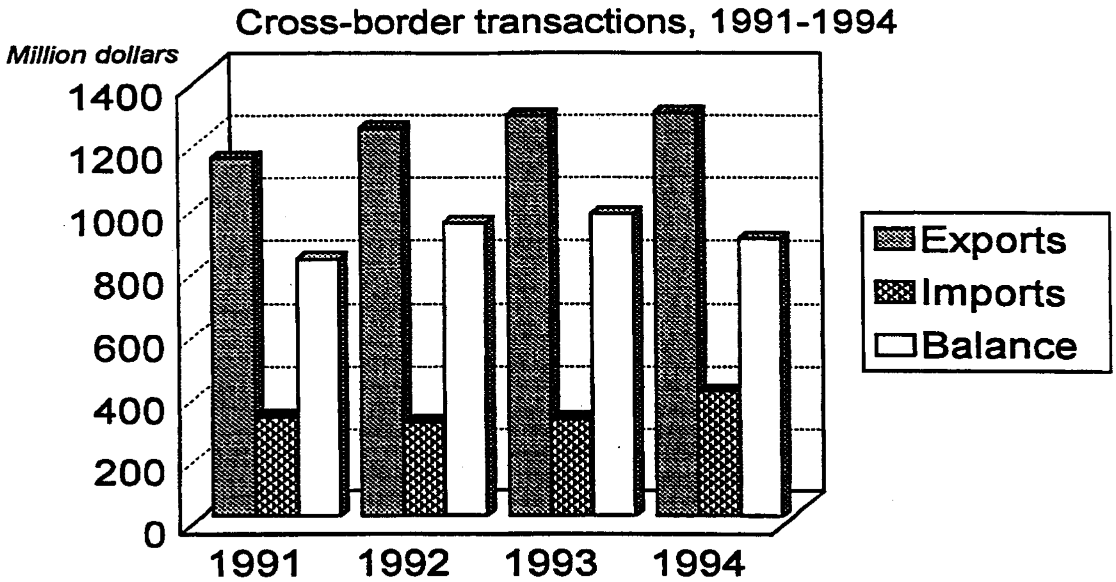
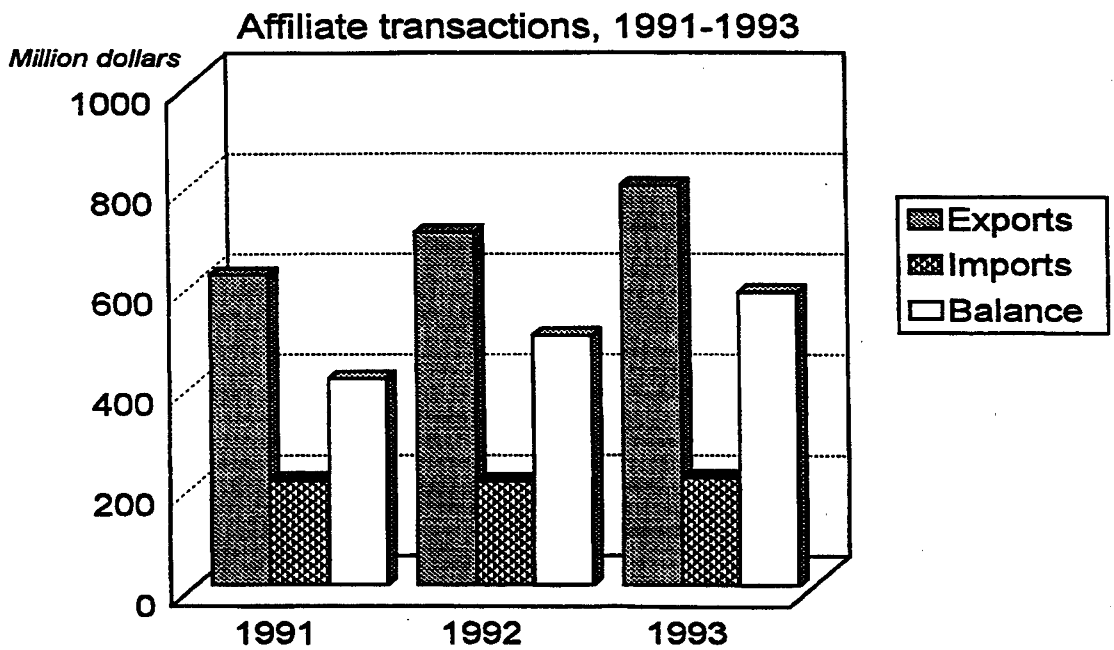
[18] Commerce inv. No. A-791-803. Commerce's preliminary determination was published in the *Federal Register* of Nov. 30, 1996 (60 F.R. 61533).

[19] Commission inv. No. 731-TA-733 (Final), *Circular Welded Non-Alloy Steel Pipe from South Africa*. Notice of the Commission's negative final determination was published in the *Federal Register* of June 18, 1996 (61 F.R. 35814).

[20] U.S. Department of Commerce, Bureau of Economic Analysis (BEA), "U.S. International Sales and Purchases of Private Services," *Survey of Current Business*, Sept. 1995.

Figure 2-5
U.S. trade in services with Africa: Exports, imports, and trade balance





Sources: U.S. Department of Commerce, Bureau of Economic Analysis, *Survey of Current Business*, Sept, 1995; ibid., *U.S. Direct Investment Abroad*, Revised 1992 Estimates, June 1995, tables III-F-17 and F-22; ibid., *Foreign Direct Investment in the United States*, Preliminary 1993 Estimates, June 1995; and ibid., *Foreign Direct Investment in the United States*, 1992 Benchmark Survey, Final Results, Sept. 1995, table E-15.

Table 2-10
Total Africa and South Africa: U.S. cross-border service exports, 1991-94

(Million dollars)

Service	Total Africa				South Africa			
	1991	1992	1993	1994	1991	1992	1993	1994
Royalties and license fees	57	47	66	64	35	35	51	51
Education	330	320	311	303	(1)	1	5	5
Insurance[2]	1	6	5	-1	2	2	2	2
Telecommunications	105	81	81	92	(3)	16	18	20
Financial services	17	30	55	45	(3)	(3)	(3)	(3)
Professional	442	549	557	579	78	74	77	76
- Advertising	2	3	2	1	(1)	1	1	1
- Computer	27	46	47	53	23	16	12	25
- Database	2	4	4	7	1	4	2	4
- Research and development	41	18	37	33	1	(1)	1	(1)
- Management, consulting, and public relations services	66	79	93	104	5	3	5	6
- Legal services	3	4	6	5	1	2	2	3
- Construction-related services	118	210	182	166	35	28	36	15
- Industrial engineering	33	8	9	6	3	(1)	(1)	(1)
- Equipment-related services	53	66	62	98	6	14	11	15
- Other professional services	98	110	115	106	2	6	7	6
Film rentals	20	27	17	15	19	24	15	13
Other	170	177	185	190	(3)	(3)	(3)	(3)
Total[4]	1142	1237	1277	1287	175	179	191	199

[1] Less than $500,000.
[2] Insurance exports are the difference between premiums received from foreign policyholders and claims collected by foreign policy-holders. Exports are entered as a debit on the balance of payments when the claims collected by foreign policyholders exceed their premiums.
[3] Data have been suppressed to avoid disclosure of individual company data.
[4] Due to rounding and suppression of individual company data, figures may not add to totals shown.

Source: U.S. Department of Commerce, Bureau of Economic Analysis, "U.S. International Sales and Purchases of Private Services," *Survey of Current Business*, Sept. 1995, pp. 82-102.

Table 2-11
Total Africa and South Africa: U.S. cross-border service imports, 1991-94

(Million dollars)

Service	Total Africa				South Africa			
	1991	1992	1993	1994	1991	1992	1993	1994
Royalties and license fees	(1)	2	(1)	4	(1)	(1)	(1)	4
Education	9	12	13	18	(1)	(1)	(1)	(1)
Insurance[2]	-2	(1)	-2	3	-1	-2	-1	(1)
Telecommunications	202	181	189	220	(3)	(3)	(3)	(3)
Financial services	1	1	3	9	1	(1)	1	5
Professional	93	88	90	125	3	11	10	14
- Advertising	(1)	(1)	2	2	0	(1)	1	1
- Computer	0	(1)	(1)	(1)	0	(1)	(1)	(1)
- Database	(1)	(1)	(1)	(1)	0	(1)	(1)	(1)
- Research and development	12	11	9	14	(1)	1	1	2
- Managment, consulting, and public relations	16	15	14	20	(1)	2	(1)	1
- Legal services	2	2	2	3	1	1	1	1
- Construction-related services	18	8	14	27	0	(1)	(1)	(1)
- Industrial engineering	(3)	0	0	0	0	0	0	0
- Equipment-related services	(1)	2	1	0	0	0	0	0
- Other professional services	(3)	48	47	59	2	7	5	9
Film rentals	0	(1)	0	1	0	0	0	1
Other	18	18	19	21	(3)	(3)	(3)	(3)
Total[4]	321	302	312	401	33	38	46	68

[1] Less than $500,000.

[2] Insurance imports are the difference between premiums paid to foreign insurers and claims received by U.S. policyholders. Imports are entered as credit on the balance of payments when claims received by U.S. policyholders exceed premiums paid to foreign insurers.

[3] Data have been suppressed to avoid disclosure of individual company data.

[4] Due to rounding and suppression of individual company data, figures may not add to totals shown.

Source: U.S. Department of Commerce, Bureau of Economic Analysis, "U.S. International Sales and Purchase of Private Services," *Survey of Current Business*, Sept. 1995, pp. 82-102.

South Africa is the largest market for U.S. service exports in Africa. In 1994, South Africa accounted for 15 percent of total U.S. cross-border service exports to Africa (table 2-10). It appears that sales of rights to patented industrial processes, telecommunication services, and professional services related to construction and other equipment accounted for 50 percent of U.S. cross-border exports to South Africa in that year.

Affiliate Transactions

The United States also runs a trade surplus with Africa in affiliate sales (table 2-12). In 1993, majority-owned African affiliates of U.S. firms recorded sales totaling $793 million[21] in Africa, while U.S. consumers purchased services valued at $212 million[22] from majority-owned U.S. affiliates of African companies, resulting in a balance of $581 million (figure 2-5). During 1991-93, sales by U.S.-owned affiliates increased by an average annual rate of 13.5 percent and the U.S. surplus in affiliate transactions by 19 percent. Petroleum-related services accounted for the bulk of U.S.-owned affiliates' service exports to African consumers.

Limited information regarding affiliate transactions is reported for South Africa and Nigeria (table 2-12).[23] According to available data, the United States ran a deficit in affiliate transactions with South Africa valued at $130 million, in 1993 the last year for which data are available. At $165 million, U.S. purchases from affiliates of South African firms alone accounted for 78 percent of all purchases from affiliates originating in Africa in 1993. Reportedly, affiliates of South African firms provide a variety of services to U.S. consumers in the financial services, tourism, courier services, and airline industries.[24] In contrast, the data indicate that sales by South African affiliates of U.S. firms accounted for only 4 percent ($35 million) of total U.S. affiliate sales to Africa. U.S. firms in Nigeria accounted for 29 percent of total affiliate sales to Africa in 1993. A large part of U.S.-owned affiliates' sales in Nigeria are likely in the petroleum sector.

Table 2-12
Africa: U.S. sales of services through U.S.-owned affiliates (exports) and African-owned affiliates (imports), 1991-93

(Million dollars)

	Total Africa			South Africa			Nigeria		
	1991	1992	1993	1991	1992	1993	1991	1992	1993
U.S. Exports	616	700	793	35	35	35	117	149	230
U.S. Imports	207	205	212	104	154	165	(1)	(1)	(1)
Balance	409	495	581	-69	-119	-130	(1)	(1)	(1)

[1] Not available.

Source: U.S. Department of Commerce , Bureau of Economic Analysis, *U.S. Direct Investment Abroad,* Revised 1991 Estimates June 1994, table III. F-17; Ibid., *U.S. Direct Investment Abroad,* Revised 1992 Estimates, June 1995, table III. F-17; and Ibid., *U.S. Direct Investment Abroad,* Preliminary 1993 Estimates, June 1995, table III. F-17; and Ibid., *Foreign Direct Investment in the United States,* Revised 1991 Estimates, June 1994, table E-13; Ibid., *Foreign Direct Investment in the United States,* Preliminary 1993 Estimates June 1995, table E-13; and Ibid., *Foreign Direct Investment in the United States: 1992 Benchmark Survey,* Final Results, Sept. 1995, table E-17.

[21] Ibid., *U.S. Direct Investment Abroad,* Preliminary 1993 Estimates, June 1995, table III-F-17.
[22] Ibid., *Foreign Direct Investment in the United States,* Preliminary 1993 Estimates, June 1995, table E-13.
[23] Information pertaining to sales by U.S. affiliates of Nigerian firms is not available.
[24] Embassy of South Africa, facsimile received by USITC staff, July 10, 1995.

Investment in Sub-Saharan Africa

Global Investment Trends

Investment flows to Sub-Saharan Africa remain small and are subject to year-to-year fluctuations. For example, the World Bank estimates that net foreign direct investment flows to Sub-Saharan Africa increased from $0.9 billion in 1990 to $3.0 billion in 1994 but fell to $2.2 billion in 1995 and accounted for 2.4 percent of such flows to all developing countries in that year.[25]

A growing source of foreign investment for Sub-Saharan Africa, particularly since 1992, has been foreign portfolio investment (FPI). FPI includes bonds issued in international capital markets (portfolio debt flows) as well as country funds, depository receipts, and direct purchases of stocks by foreign investors (portfolio equity flows). Growth in FPI has been due to structural adjustment policies in Sub-Saharan Africa, an emphasis on development of stock exchanges in the region, and to an interest on the part of foreign investors to diversify their portfolios internationally.

Portfolio debt flows to Sub-Saharan Africa have been highly concentrated in a few countries. For instance, during 1994-95 only Congo, a first-time borrower, South Africa, and Mauritius had new bond issues.[26] World Bank data, on the other hand, indicate that foreign portfolio equity investments have recently flowed into South Africa, Nigeria, Ghana, Zimbabwe, Namibia, Mauritius, and Côte d'Ivoire.[27]

There are 11 operative stock exchanges in Sub-Saharan Africa. These include the Johannesburg Stock Exchange (JSE) in South Africa, which is the 11th-largest stock exchange in the world and the largest exchange in Sub-Saharan Africa, as well as exchanges in Zambia, Namibia, Ghana, Swaziland, Kenya, Côte d'Ivoire, Mauritius, Zimbabwe, Botswana, and Nigeria.[28] The JSE has a market capitalization of $240 billion and the remaining 10 stock exchanges have a combined capitalization of about $11 billion.[29] Most foreign portfolio equity investments in Sub-Saharan Africa are in the petroleum, mining, chemicals, and plastics industries.[30] According to the World Bank, portfolio equity investment flows to Sub-Saharan Africa increased from $144 million in 1992 to $860 million in 1994, before falling to $465 million in 1995.[31]

[25] The World Bank, *World Debt Tables,* vol. 1 (Washington, DC: The World Bank, 1996).
[26] The World Bank, *World Debt Tables*, vol. 1, p. 101.
[27] Ibid., vol. 2.
[28] Mbendi Information Services, "Africa's Stock Exchanges," found at http://mbendi.co.za/Mbendi/exaf.htm. Stock exchanges are scheduled to be open in Tanzania, Uganda, and Malawi during 1996.
[29] Ibid.
[30] Ibid.
[31] The World Bank, *World Debt Tables*, vol. 1, p. 102. According to the World Bank portfolio equity flows declined globally in 1995 due to higher U.S. interest rates in early 1994 and to the devaluation of the Mexican peso in late 1994, which eroded investor confidence in emerging market investments.

U.S. Investment in Sub-Saharan Africa

Recent Trends

According to data from the Department of Commerce,[32] U.S. direct investment abroad (USDIA) in Sub-Saharan Africa grew from $3.6 billion at yearend 1994 to $4.5 billion in 1995, or by 25.3 percent, as shown below (historical-cost basis, million dollars):

Country	1994	1995
South Africa	1,013	1,269
Angola	575	650
Nigeria	322	595
Cameroon	228	258
Liberia	197	229
Kenya	134	190
Ghana	143	170
Zimbabwe	144	150
Gabon	157	142
Zaire	58	80
Zambia	52	63
All other	557	691
Total	3,580	4,487

USDIA in Sub-Saharan Africa amounted to 0.6 percent of total USDIA in 1995.[33] Of the total USDIA in Sub-Saharan Africa in 1995, $1.3 billion, or 28.3 percent, was in South Africa, $650 million, or 14.5 percent, was in Angola, and $595 million, or 13.3 percent, was in Nigeria. During 1994-95, USDIA in a number of countries increased significantly. These countries and their growth rates for USDIA include Nigeria (84.8 percent), Kenya (41.8 percent), Zaire (37.9 percent), South Africa (25.3 percent), Zambia (21.2 percent), Ghana (18.9 percent), Cameroon (13.2 percent), and Angola (13.0 percent).

The available data[34] on net U.S. portfolio equity flows to Sub-Saharan and other African countries during 1994-95 are shown below (million dollars):

Country	1994	1995
South Africa	164	372
Ghana	32	6
Liberia	13	0
Zaire	4	0
Other Africa	24	-63

U.S. portfolio equity flows were largest to South Africa during 1994-95, increasing by 127 percent. The lifting of financial sanctions against South Africa precipitated the launching of several international funds devoted to South Africa, such as Alliance Capital Management's $100 million Southern African Fund and Morgan Stanley's $60 million Africa Fund, which have encouraged foreign portfolio investment in South

[32] U.S. Department of Commerce, facsimile received by USITC staff, July 23, 1996.

[33] Department of Commerce, BEA, *Survey of Current Business*, Sept. 1996, table 17.

[34] U.S. Department of the Treasury Financial Management Service, *U.S. Treasury Bulletin,* Dec. 1995, and June 1996, table CM-V-5.

Africa.[35] Information on U.S. investment in selected countries in Sub-Saharan Africa and the investment climate is provided in the following section.

Major Countries for U.S. Investment Growth, 1994-95

USDIA in Nigeria is concentrated largely in the petroleum sector. Nigeria is generally not considered to have a safe investment climate outside of the petroleum sector.[36] In an effort to attract foreign investment, Nigeria altered many of its investment policies in 1995.[37] These changes included allowing foreign investors to source foreign exchange from wherever they want and eliminating prior limitations on the extent of foreign ownership. Additionally, the Nigerian National Petroleum Corp. released a recent report announcing that it will invest $2.8 billion in its oil sector before 1998 to increase its crude oil reserves by 25 percent.[38] Most of Nigeria's petroleum production is controlled by foreign companies.[39]

USDIA in Kenya is concentrated in the toiletries, cosmetics, and pharmaceutical industries; petroleum refining and distribution; and vehicle assembly.[40] In the early 1990s, Kenya began implementing policies to encourage investment, such as liberalizing foreign exchange controls, decontrolling prices and interest rates, and developing export processing zones.[41] Kenya also set new guidelines for processing investment applications through a "one-stop shop." Additionally, Kenya has wide ranging plans to liberalize its capital market and to expand the number of companies listed on the 36-year old Nairobi Stock Exchange (NSE). Between 1992 and 1995, the Government of Kenya privatized 67 out of a possible 212 public sector enterprises.[42] As more of these enterprises are privatized, the stocks of these companies are expected to be listed on the NSE.

Due to its substantial market, its access to other countries in Sub-Saharan Africa, allowed repatriation of profits, and more market-oriented policies, South Africa is generally considered to have the best foreign investment climate in Sub-Saharan Africa.[43] Foreign investors are allowed 100 percent ownership in South Africa, and foreign investment is not normally screened. USDIA in South Africa is concentrated in manufacturing, primarily in chemicals, machinery, and equipment, as well as in petroleum and financial services.

There has been renewed interest in foreign investment in Zambia on account of its structural adjustment programs, which include plans to privatize numerous state-owned enterprises.[44] Recent political volatility

[35] U.S. Department of Agriculture, Foreign Agricultural Service, "1996 Country Risk Assessment: South Africa," July 17, 1995.

[36] U.S. Department of Commerce, International Trade Administration (ITA), "1996 Country Commercial Guide for Nigeria," National Trade Data Bank, 1995.

[37] Ibid.

[38] "Nigeria Pours New Investment into Oil Sector," Comtex Scientific Corp., NewsEDGE/LAN, May 7, 1996.

[39] Ibid.

[40] U.S. Department of Commerce, ITA, "1996 Country Commercial Guide for Kenya," National Trade Data Bank, 1995.

[41] Ibid.

[42] Ibid.

[43] U.S. Department of Commerce, ITA, "1996 Country Commercial Guide for South Africa," National Trade Data Bank, 1995.

[44] U.S. Department of Commerce, ITA, "1996 Country Commercial Guide for Zambia," National Trade Data Bank, 1995.

has halted interest on the part of some potential foreign investors to purchase newly privatized enterprises.[45] However, the Government of Zambia recently gave exploration and mining rights to 11 foreign mining companies to encourage private investment in that sector.[46] The largest foreign investments in Zambia involve South African firms and are concentrated in food and beverage processing, hotels, trading, and agriculture. About 33 U.S. firms have subsidiaries in Zambia. At least four major U.S. firms have taken leading positions in privatizations conducted by the Zambia Privatization Agency.[47]

Economic reforms in Ghana, which has large mineral deposits (primarily gold), tropical hardwoods, and export crops, have been widely praised and have encouraged foreign investment.[48] USDIA in Ghana is largely concentrated in mining (gold and aluminum) and in food processing.

USDIA in both Cameroon and Angola is largely concentrated in petroleum. Although Cameroon has an attractive investment code and laws that favor private enterprise, reportedly these laws are not enforced in a fair and transparent manner, thus discouraging foreign investment outside of the petroleum sector.[49] Cameroon is currently negotiating with U.S. and other oil companies on a $1.5 billion pipeline project which will bring oil from Chad to Cameroon.[50] In Angola, the oil sector is the most prosperous sector; production of most non-oil products is limited.[51]

The investment climate in Liberia had been damaged by years of political instability, even before the current civil war which started in December 1989. Nevertheless, several major U.S. investments remain in the rubber, beverage processing, banking, insurance, petroleum, and security and navigation systems industries.[52] The Firestone Natural Rubber Company plantation and rubber processing plant is the largest U.S. company in Liberia; however, most rubber plantations are not in a production status due to the war. Many other companies are also operating at a reduced level due to the war.[53]

The United States is the third largest investor in Zimbabwe, with about 45 U.S. companies operating in the country in 1995.[54] USDIA in Zimbabwe is in production and refining of chrome alloys, engine assembly, seed conditioning, tobacco processing, and distribution of retail petroleum. Zimbabwe has one of the most highly skilled labor forces in Africa, but high inflation and interest rates in the country tend to discourage

[45] This volatility began in late 1994 when former president Kenneth Kaunda announced his plans to run in Zambia's 1996 elections. Kaunda also announced that if he returned to power, he would nationalize all parastatal firms sold by the current government. Ibid.

[46] "Zambia Encourages Private Investment," Comtex Scientific Corp., NewsEDGE/LAN, June 6, 1996.

[47] U.S. Department of Commerce, ITA, "1996 Country Commercial Guide for Zambia."

[48] U.S. Department of Commerce, ITA, "1996 Country Commercial Guide for Ghana," National Trade Data Bank, 1995.

[49] U.S. Department of Commerce, ITA, "1996 Country Commercial Guide for Cameroon," National Trade Data Bank, 1995.

[50] U.S. Department of State cable, "Economic Patterns in Cameroon and the Region," message reference No. 009347, prepared by U.S. Embassy, Yaounde, Dec. 1995.

[51] US. Department of State, "1995 Country Report on Economic and Trade Policy Practices: Angola," 1995.

[52] U.S. Department of Commerce, ITA, "Liberia--U.S. Business Contacts," Market Research Report, Apr. 13, 1995.

[53] Ibid.

[54] U.S. Department of Commerce, ITA, "1996 Country Commercial Guide for Zimbabwe," National Trade Data Bank, 1995.

foreign investment.[55] Additionally, certain sectors of the economy are still "reserved for domestic investors."[56]

Investment Treaties

As noted in the Commission's last report, the United States has bilateral investment treaties (BITs) in place with four countries in Sub-Saharan Africa: Cameroon, Congo, Senegal, and Zaire. These treaties guarantee U.S. investors in these countries that investment terms are no less favorable than those accorded to domestic or third-country investors. The BITs provide for the unconditional repatriation of capital, the protection of intellectual property rights, and for access to international forums of arbitration. The U.S. Government is currently in the process of negotiating a BIT with South Africa, and a double taxation agreement with South Africa is also being negotiated against a background of an internal review of South Africa's tax system. ■

[55] "U.S. Urges for Improving Investment Climate in Zimbabwe," Comtex Scientific Corp., NewsEDGE/LAN, Apr. 25, 1996.

[56] U.S. Department of Commerce, ITA, "1996 Country Commercial Guide for Zimbabwe."

CHAPTER 3
Finance, Trade and Development Issues Affecting U.S-Sub-Saharan Africa Trade and Investment Opportunities

This chapter presents developments in the World Trade Organization (WTO) affecting Sub-Saharan Africa as well as information on U.S. trade, economic, and commercial activities affecting Sub-Saharan Africa during 1995-96. This chapter discusses general developments and overall trends in such activities. Specific actions taken by countries to meet obligations under the Uruguay Round Agreements (URA) and specific developments in U.S. trade, economic, and commercial policies likely affecting U.S. trade and investment with the region in major sectors are discussed in chapter 4. General developments in WTO activities and in trade and economic assistance for Sub-Saharan Africa during 1995-96 are summarized in table 3-1.

U.S. trade and investment relationships with countries in Sub-Saharan Africa are influenced by a number of factors. For WTO member countries, these factors include developments in the WTO and actions taken to implement their obligations under the URA. U.S. export and investment relationships with the region are additionally affected by policies and programs of the Export-Import Bank of the United States (Eximbank), the U.S. Trade and Development Agency (TDA), the Overseas Private Investment Corporation (OPIC), and various programs for agricultural exports operated by the U.S. Agency for International Development (USAID) and the U.S. Department of Agriculture (USDA).[1] The nature and level of U.S. imports from Sub-Saharan Africa are similarly influenced by developments in the U.S. Generalized System of Preferences (GSP).

Concessional lending through the International Development Association (IDA) of the World Bank and the African Development Fund (AfDF) of the African Development Bank (AfDB) plays an important role in financing economic development programs in the region. The United States is a shareholder in both the World Bank and the AfDB, thus the United States Government has an important voice in these banks' operations, and U.S. companies are eligible to bid on their funded procurement opportunities. U.S. economic assistance programs to Sub-Saharan Africa are largely provided through grants and administered by USAID.[2] USAID's Development Assistance programs in Sub-Saharan Africa assist sustainable development in health, education, agriculture, finance and business development, population, and building democracy.[3] Other USAID-administered programs in Sub-Saharan Africa include food assistance, disaster assistance, and balance of payments support through the Economic Support Fund.

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[1] Export programs that are administered by the USDA and targeted to agricultural products are discussed in chapter 4.

[2] The USDA administers Title I of Public Law 480 which provides sales of U.S. agricultural commodities using long-term concessional credit. This program is discussed in chapter 4.

[3] USAID programs in Sub-Saharan Africa are discussed in the first Commission report on U.S.-Africa trade flows. See U.S. International Trade Commission (USITC), *U.S.-Africa Trade Flows and Effects of the Uruguay Round Agreements and U.S. Trade and Development Policy*, USITC publication 2938, Jan. 1996.

Table 3-1
Summary of general developments in the World Trade Organization and in multilateral and U.S. trade and economic assistance for Sub-Saharan Africa, 1995-96

Institution/activity	1995 assistance levels for Sub-Saharan Africa	Other developments[1]
World Trade Organization	Not applicable	As of July 30, 1996, 33 Sub-Saharan African countries had joined the WTO. Activities included administration and implementation of the Uruguay Round Agreements, including actions taken by the WTO Committee on Agriculture to implement the Uruguay Round Decision on Measures Concerning the Possible Negative Effects of the Reform Programme on Least-Developed and Net-Food Importing Developing Countries. Africa Initiative involves increased technical cooperation and assistance for Africa and a research project investigating the implications of the URA for African countries.
Multilateral Economic and Trade Assistance		
The World Bank Group: International Development Association (IDA)/ World Bank	FY 1995 lending commitments of $2.3 billion, down from $2.8 billion in FY 1994	Donor countries agreed to a $22 billion funding package for all IDA loans for FYs 1997-99. The 3-year funding package includes an Interim Trust Fund (ITF) for FY 1997 of about $3.0 billion. U.S. companies will not be able to bid on procurement of goods and services for projects funded through the ITF, due to the U.S. decision not to contribute to the ITF. Staff are working with the International Monetary Fund on a debt relief initiative.
The World Bank Group: Multilateral Investment Guarantee Agency (MIGA)	As of June 30, 1995, MIGA's investment guarantees in Sub-Saharan Africa amounted to $40.4 million, or 2.5 percent of MIGA's total guarantee portfolio.	MIGA issued its first guarantee contracts to South Africa in FY 1995 for investments in a steel slag processing plant. Two guarantees were also issued for a joint venture in Uganda to clean, grade, and bag high-quality coffee beans for export to Europe.
The World Bank Group: International Finance Corporation (IFC)	The IFC approved $431 million in loans for private sector projects in 21 countries in Sub-Saharan Africa in FY 1995.	

[1] Jan. 1995 - Aug. 1996.

Table 3-1--Continued
Summary of general developments in the World Trade Organization and in multilateral and U.S. trade and economic assistance for Sub-Saharan Africa, 1995-96

Institution/activity	1995 assistance levels for Sub-Saharan Africa	Other developments[1]
Multilateral Economic and Trade Assistance--Continued		
African Development Bank Group	FY 1995 lending of $472.9 million, down from $1,426.9 million in FY 1994.	In May and June 1996, donors agreed to a package of about $3.0 billion for lending by the African Development Bank Fund during FYs 1996-98. Management reforms instituted during FYs 1995 and 1996. South Africa became a member as of Dec. 31, 1995.
International Monetary Fund (IMF)	Net IMF concessional loan disbursements to Sub-Saharan Africa in 1995 amounted to $1.5 billion, up from $461.3 million in 1994. A loan to Zambia accounted for 67 percent of disbursements in 1995.	Currently working on an initiative to provide debt relief to heavily indebted poor countries. Possibly 16 to 19 countries in Sub-Saharan Africa could be eligible for this initiative.
Paris Club debt relief	Bilateral agreements for debt relief between the United States and six Sub-Saharan African countries, representing a total of $188.7 million in nonconcessional debt, entered into force in FY 1995.	Paris Club debt relief, using the "Naples Terms," allows creditors to reduce debt service and debt stock up to 67 percent.
U.S. Economic and Trade Assistance		
Export-Import Bank of the United States	Support in Sub-Saharan Africa was $2.8 billion as of Dec. 31, 1995, down from $3.2 billion in 1994.	Botswana, Ghana, Lesotho, Mauritius, Namibia, Seychelles, South Africa, Swaziland, and Zimbabwe were eligible for all programs, and Benin, Gabon, Kenya, and Uganda were eligible for some programs.
U.S. Trade and Development Agency (TDA)	TDA's obligations in Sub-Saharan Africa amounted to $3.9 million during FY 1995, up from $2.8 million in FY 1994.	TDA began to require reimbursement for its contributions to successful projects in 1995. This fee is collected after the U.S. beneficiary of TDA's support implements its project.
Overseas Private Investment Corporation (OPIC)	OPIC support in Sub-Saharan Africa amounted to $173.7 million in FY 1995, down from $236.5 million in FY 1994.	Established the New Africa Opportunities Fund, a privately-managed equity fund, to encourage entrepreneurship in South Africa and neighboring countries in 1995. As of Aug. 31, 1996, OPIC programs were suspended in six countries--Burundi, Gambia, Liberia, Mauritania, Sudan, and Nigeria. Comoros and Seychelles do not have OPIC investment agreements.

[1] Jan. 1995 - Aug. 1996.

Table 3-1--Continued
Summary of general developments in the World Trade Organization and in multilateral and U.S. trade and economic assistance for Sub-Saharan Africa, 1995-96

Institution/activity	1995 assistance levels for Sub-Saharan Africa	Other developments[1]
U.S. Economic and Trade Assistance--Continued		
U.S. Generalized System of Preferences (GSP)	U.S. imports from Sub-Saharan Africa under GSP rose from $328.6 million in 1994 to $488.8 million in 1995. Imports from South Africa amounted to 73.1 percent of GSP imports from the region in 1995.	Expired on July 31, 1995. Legislation signed into law on Aug. 20, 1996, renewed the program until May 31, 1997. The law allows products from least developed countries to be added to the GSP list provided such imports would have only a minimal impact on the U.S. industry.
Development Assistance and other U.S. economic assistance programs	U.S. bilateral assistance programs in Sub-Saharan Africa administered by the U.S. Agency for International Development and the U.S. Department of Agriculture amounted to $1.5 billion in FY 1995, down from $1.6 billion in FY 1994.	The Development Fund for Africa was discontinued in FY 1996. Development Assistance programs for Africa are now funded through the Development Assistance Fund.

[1] Jan. 1995 - Aug. 1996.

Source: Compiled by the staff of the U.S. International Trade Commission.

Developments in the World Trade Organization

Developments in the WTO during 1995-96 were centered around the implementation and administration of the URA. General institutional, organizational, and procedural matters undertaken by the WTO included the establishment of various Councils, Committees, and other bodies; the appointment of office-bearers; and the installation of procedures with respect to notification and review of commitments and policies, consultations, dispute settlement, technical cooperation, and other matters. As the period progressed and the necessary administrative structures were established, the WTO began operational activities, such as conducting trade policy reviews, notification surveillance, dispute panels, trade monitoring, and seminars and courses.

During 1995-96, the WTO conducted regional and national seminars, workshops, and technical missions and had ongoing staff contact with officials in member countries, including those in Sub-Saharan Africa. The WTO held two workshops on notification requirements, two dispute settlement courses, several trade policy courses, and a special training course on dispute settlement procedures and practices which were available to WTO member countries in Sub-Saharan Africa.[4]

[4] WTO, Committee on Trade and Development, *Report on Technical Cooperation*, document WT/COMTD/W/14, May 15, 1996.

Membership Status

The membership status of countries in Sub-Saharan Africa with respect to the WTO is shown in table 3-2. By July 30, 1996, 33 countries in the region had joined the WTO, with nine additional countries--Benin, Burundi, Cameroon, Guinea, Madagascar, Mozambique, Niger, Rwanda, and Sierra Leone--joining since the last Commission report. The WTO is still considering accession requests by Seychelles and Sudan. No additional Sub-Saharan African countries have requested to join the WTO since the last Commission report.[5]

Sub-Saharan African URA Obligations and Technical Assistance

The WTO has recognized the special needs of developing and least developed countries from its inception. All countries in Sub-Saharan Africa except South Africa are in these categories.[6] This recognition is embodied in various provisions of the URA that allow for a reduction in the scope of obligations, longer phase-in periods, and reduced notification requirements for these countries.[7] For example, Article XI 2. of the Agreement Establishing the World Trade Organization states that "The least-developed countries recognized as such by the United Nations will only be required to undertake commitments and concessions to the extent consistent with their individual development, financial and trade needs or their administrative and institutional capabilities." The following URA contain specific articles regarding special and differential treatment for developing countries and least-developed country members: Agreement on Agriculture[8] (article 15), Agreement on the Application of Sanitary and Phytosanitary Measures[9] (SPS Agreement) (article 10), Agreement on Technical Barriers to Trade[10] (article 12), Agreement on Trade-Related Investment Measures[11] (article 4), Implementation of Article IV of the General Agreement on Tariffs and Trade 1994[12] (article 15),

[5] Countries in Sub-Saharan Africa that have not made requests to join the WTO include Cape Verde, Comoros, Equatorial Guinea, Eritrea, Ethiopia, Liberia, São Tomé and Principe, and Somalia.

[6] Developing countries in Sub-Saharan Africa include Botswana, Cameroon, Congo, Côte d'Ivoire, Gabon, Ghana, Kenya, Mauritius, Namibia, Nigeria, Senegal, Seychelles, Swaziland, and Zimbabwe. Least developed countries in Sub-Saharan Africa include Angola, Benin, Burkina, Burundi, Cape Verde, Central African Republic, Chad, Comoros, Djibouti, Equatorial Guinea, Eritrea, Ethiopia, Gambia, Guinea, Guinea-Bissau, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mozambique, Niger, Rwanda, São Tomé and Principe, Sierra Leone, Somalia, Sudan, Tanzania, Togo, Uganda, Zaire, and Zambia. These country categories are defined by the Economic and Social Council of the United Nations.

[7] Notification obligations in Annex 1A of the WTO Agreement are compiled in WTO document G/NOP/W/14, May 20, 1996.

[8] Agreement on Agriculture, Final Agreement Embodying the Results of the Uruguay Round of Multilateral Negotiations.

[9] Agreement on the Application of Sanitary and Phytosanitary Measures, Final Act Embodying the Results of the Uruguay Round of Multilateral Negotiations.

[10] Agreement on Technical Barriers to Trade, Final Act Embodying the Results of the Uruguay Round of Multilateral Negotiations.

[11] Agreement on Trade-Related Investment Measures, Final Act Embodying the Results of the Uruguay Round of Multilateral Negotiations.

[12] Agreement on Implementation of Article IV of the General Agreement on Tariffs and Trade 1994, Final Act Embodying the Results of the Uruguay Round of Multilateral Negotiations.

Table 3-2
Sub-Saharan Africa: Status under the General Agreements on Tariffs and Trade (GATT) and the World Trade Organization (WTO), by country, as of July 30, 1996

WTO member countries (33)	
Benin	Mali
Botswana	Mauritania
Burkina	Mauritius
Burundi	Mozambique
Cameroon	Namibia
Central African Republic	Niger
Côte d'Ivoire	Nigeria
Djibouti	Rwanda
Gabon	Senegal
Ghana	Sierra Leone
Guinea	South Africa
Guinea-Bissau	Swaziland
Kenya	Tanzania
Lesotho	Togo
Madagascar	Uganda
Malawi	Zambia
	Zimbabwe
GATT member countries but not yet WTO members (5)	
Angola	Congo
Chad	Gambia
	Zaire
Countries that have made formal requests for WTO accession (2)	
Seychelles	Sudan

Source: World Trade Organization, membership list, found at http://www.wto.org/membat2_ wpf.html.

Implementation of Article VII of the General Agreement on Tariffs and Trade 1994[13] (article 20), Agreement on Subsidies and Countervailing Measures[14] (article 27), and Agreement on Safeguards[15] (article 9).

In addition to the specific articles mentioned above, the Decision On Measures In Favor Of Least-Developed Countries affirms preferential treatment for the least developed countries and mandates continuing WTO

[13] Agreement on Implementation of Article VII of the General Agreement on Tariffs and Trade 1994, Final Act Embodying the Results of the Uruguay Round of Multilateral Negotiations.

[14] Agreement on Subsidies and Countervailing Measures, Final Act Embodying the Results of the Uruguay Round of Multilateral Negotiations.

[15] Agreement on Safeguards, Final Act Embodying the Results of the Uruguay Round of Multilateral Negotiations.

consideration and support.[16] The Decision on Measures Concerning the Possible Negative Effects of the Reform Programme on Least-Developed and Net Food- Importing Developing Countries[17] committed the WTO to establish mechanisms to ensure that the Agreement on Agriculture does not adversely affect the availability of food aid to developing countries.[18]

The WTO Committee on Trade and Development (CTD) was given specific responsibility for matters concerning least-developed WTO members.[19] During 1995-96, the CTD created the Subcommittee on Least-Developed Countries, organized a workshop to help members meet notification requirements, and reviewed trade issues affecting developing countries.[20] The CTD focused on three main issues regarding developing and least-developed WTO members during this period: guidelines for providing technical assistance; implementation of WTO commitments; and, the integration of these members into the multilateral trade system.[21]

Activities of the WTO Committee on Sanitary and Phytosanitary Measures during 1995-96 centered on technical assistance and special and differential treatment for developing and least-developed country members.[22] Technical assistance activities included Committee meetings, regional seminars, and ongoing contact with country representatives. Two regional seminars were held in Dakar, Senegal, and Pretoria, South Africa, in November 1995. The seminars, held in conjunction with the Codex Alimentarius Commission, the International Office of Epizootics, the International Plant Protection Convention, and the World Health Organization, were designed to educate developing and least developed countries regarding the content and requirements of the SPS Agreement.[23] There were no activities regarding special and differential treatment during the period, inasmuch as no developing country had yet requested exceptions from obligations under article 10 of the SPS Agreement regarding special and differential treatment.

Activities in other WTO committees and organs during the period under review mainly included establishing procedures regarding notification and other obligations, reviewing member policies, and providing technical assistance to help members understand commitments and meet obligations.[24] For the most part, these activities did not specifically target Sub-Saharan African members. Following is a summary of relevant activities in WTO bodies specifically affecting Sub-Saharan African members during the period under review:[25]

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[16] Decision On Measures In Favor Of Least-Developed Countries, Final Act Embodying the Results of the Uruguay Round of Multilateral Negotiations.

[17] Decision on Measures Concerning the Possible Negative Effects of the Reform Programme on Least-Developed and Net Food-Importing Developing Countries, Final Act Embodying the Results of the Uruguay Round of Multilateral Negotiations.

[18] Particularly with respect to the decrease in export subsidies that could result in higher food prices and lower availability.

[19] Article IV 7. of the Agreement Establishing the World Trade Organization.

[20] Renato Ruggiero, "Overview of WTO's First Year," *WTO Focus* , Dec. 1995, p. 7.

[21] USITC staff telephone interview with an official of the WTO Committee on Trade and Development, Aug. 1, 1996.

[22] WTO internal report, Work On Development-Related Provisions Undertaken In The Committee on Sanitary And Phytosanitary Measures, requested by the Chairman of the Committee on Trade and Development, July 1996.

[23] WTO, *WTO Focus*, Aug.-Sept. 1995, p. 12.

[24] Renato Ruggiero, "Overview of WTO's First Year," *WTO Focus*, Dec. 1995, pp. 5-17.

[25] Unless otherwise specified, the information in this summary is from Office of the United States Trade Representative (USTR), *1995 Annual Report of the President of the United States on the Trade Agreements Program*, found at http://www.ustr.gov/reports/tpa/1996.

- *Committee on Market Access*--This Committee reviewed, verified, and approved schedules of concessions on agricultural and industrial products for developing countries that were given an extra year to submit the schedules and for countries that acceded to the WTO under special provisions for former colonies.

- *Working Party on Notifications*--This Working Party analyzed the issue of assistance to developing countries in meeting notification obligations and indicated it will offer recommendations to the WTO General Council by the end of 1996 on streamlining the requirements.

- *Committee on Trade and the Environment*--This Committee considered a request by Nigeria to draft an agreement regarding trade in goods that are exported but are prohibited for domestic sale.

- *Committee on Balance of Payments Restrictions*--This Committee held full consultations with Nigeria and South Africa during 1995-96 regarding restrictive trade measures taken for balance of payments considerations.[26]

- *General Council*--Under the direction of the General Council, the various bodies of the WTO are making preparations for the first WTO Ministerial Conference to be held in Singapore during December 9-13, 1996. These preparations include determining priority issues for the Conference agenda and drafting progress reports on WTO activities and compliance with URA commitments. The General Council announced that it will prepare a comprehensive report for Ministerial review in the fall of 1996.

- *Other*--The Market Access Committee and the Council for Trade in Goods approved requests for the extension of waivers under Article IX of the Agreement Establishing the World Trade Organization by Senegal and Zambia concerning renegotiation of their schedules of commitments.[27] The Trade in Services Division held a conference on regional African telecommunications in Côte d'Ivoire during May, 1995.

WTO Committee on Agriculture

Inasmuch as agriculture accounts for a substantial share of the economies of Sub-Saharan African countries, activities in the WTO Committee on Agriculture can have an important impact on these countries. WTO Committee on Agriculture activities during 1995-96 mainly involved the establishment of working procedures and notification requirements and obligations; administration of substantive elements of the Agreement on Agriculture (such as concessions and notifications); administration of the Decision on Measures Concerning the Possible Negative Effects of the Reform Programme on Least-Developed and Net Food-Importing Developing Countries (NFDIC); and, preparations for the first WTO Ministerial Conference.[28]

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[26] South Africa eliminated balance of payments measures, and consultations with Nigeria are to continue in Sept. 1996.

[27] U.S. Department of State, "Instructions for WTO General Council," message reference No. 149084, prepared by the Secretary of State, Washington, D.C., July 18, 1996.

[28] WTO internal report on Work On Development Related Provisions In The Committee On Agriculture requested by the Chairman of the Committee on Trade and Development, July 1996.

Substantive actions taken by the Committee during this period include the modification of notification obligations, administering the NFIDC Decision, and providing technical assistance. Least developed countries are now required to notify the WTO regarding domestic support every 2 years, as opposed to annually. Developing countries may now request that certain elements of required notification be set aside. The Committee established a list of net food-importing developing countries, which comprises the least developed countries and 15 developing country members.[29] Technical assistance was provided through contacts and seminars at WTO headquarters in Geneva, through remote contacts (telephone, fax, etc.), and through missions to member countries. Such assistance in Sub-Saharan Africa dealt mainly with details regarding obligations under the URA, including notification requirements and procedures.

WTO Africa Initiative

The WTO's Africa Initiative was instituted in 1995 to encourage the growth and diversification of Africa's international trade. This initiative mainly involves increased technical cooperation and assistance and a research project investigating the implications of the URA for African countries. The initiative responds to concerns expressed by African members regarding reduced trading preferences in their export markets and rising food prices resulting from the URA.[30] Activities related to technical cooperation and assistance have included missions to African countries to assist in the understanding of the contents and obligations of the URA.[31] Additionally, the Director-General of the WTO traveled to Côte d'Ivoire, Ghana, South Africa, Kenya, and Tanzania in connection with technical cooperation efforts.[32] The WTO also established a technical assistance fund for least developed countries. The fund was financed largely by a $2.5 million contribution from the Government of Norway.[33] Another grant of 1.1 million ECUs was made by the European Union (EU) to finance eight WTO seminars in the Africa, Caribbean, and Pacific region (six in Africa) regarding the results of the URA.[34]

Another element of the WTO's Africa Initiative is increased cooperation with other intergovernmental organizations, particularly the United Nations Conference on Trade and Development (UNCTAD) and the International Trade Center, to coordinate efforts to assist countries in the region. The first high-level meeting between the WTO and UNCTAD took place on January 11, 1996, in connection with the initiative,[35] and the Director-General of the WTO attended the UNCTAD IX conference held in Midrand, South Africa, during April 27- May 11, 1996. UNCTAD, in connection with the cooperative effort with the WTO, announced its Special Initiative on Africa on March 15, 1996, to facilitate trade and investment in the region.[36] In another related development, the World Association of Investment Promotion Agencies approved the establishment of an African chapter on May 4, 1996, to improve regional investment activities.[37]

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[29] USITC staff telephone conversation with an official of the WTO Committee on Agriculture, July 30, 1996. Developing countries in Sub-Saharan Africa that were designated as net-food importers include Côte d'Ivoire, Kenya, Mauritius, and Senegal.

[30] Renato Ruggiero, "Africa's trade is top WTO priority," *WTO Focus*, July 1995, pp. 4-5.

[31] For example, the regional seminars held in Sub-Saharan Africa regarding the SPS Agreement.

[32] USITC staff telephone conversation with an official of the WTO, Aug. 1, 1996.

[33] WTO, *WTO Focus*, Aug.-Sept. 1995, p. 12.

[34] Renato Ruggiero, "Overview of WTO's First Year," *WTO Focus*, Dec. 1995, p. 8.

[35] WTO, *WTO Focus*, Jan.-Feb. 1996, p. 12.

[36] UNCTAD, "UNCTAD Puts Africa High On Its Agenda," press release TAD/INF/2642, Mar. 15, 1996, found at gopher://iccuc2.unicc.org:70/00/UNCTAD/pressrel/960315.642.

[37] UNCTAD, "World Association of Investment Promotion Agencies Establishes an African Chapter During UNCTAD IX," Note to correspondents No. 6, May 23, 1996, found at gopher://iccuc2.unicc.org:70/00/UNCTAD/pressrel/960523.6n.

Trade Policy Reviews

The Trade Policy Review Body (TPRB) of the WTO conducts trade policy reviews of member states. During 1995, the WTO conducted trade policy reviews of the Sub-Saharan Africa countries of Cameroon, Côte d'Ivoire, Mauritius, and Uganda. The TPRB is planning a review of Benin in 1996. The following discussion summarizes the findings of these reviews.

Cameroon began economic reforms prior to the URA, mainly in response to declining global petroleum prices and the related devaluation of the CFA franc. The TPRB concluded that while Cameroon has made significant economic reforms, its relatively limited commitments under the URA were a cause of concern.[38]

Côte d'Ivoire began economic liberalization prior to the URA, mainly in response to a prolonged recession linked to depressed world prices for cocoa and coffee[39] and the related 50-percent devaluation of the CFA franc on January 12, 1994. The TPRB concluded that the Government of the Côte d'Ivoire has made significant reforms, particularly with respect to tariffs, quotas, and privatization.[40]

The TPRB questioned the trade policies of Mauritius with respect to most-favored-nation and national treatment principles and its limited use of bound tariffs. Commitments made by Mauritius in the services sector were noted by the TPRB. The TPRB concluded the UR Agreement on Agriculture (along with the reform of the EU's sugar regime) likely will weaken the price Mauritius receives for sugar exports,[41] and that further progress is necessary in general trade policy areas.[42]

Uganda also initiated economic reforms prior to the URA, largely the result of a cessation of political upheaval and civil war. The TPRB concluded that Uganda has fulfilled all necessary conditions to become a WTO member and that the URA will contribute to Uganda's trade and investment objectives.

Developments in Multilateral Assistance to Sub-Saharan Africa

As noted earlier, the World Bank and the AfDB are major sources of multilateral assistance for Sub-Saharan Africa. Additionally, the International Monetary Fund (IMF) makes some concessional loans to help countries in balance-of-payments difficulties. Loans of the World Bank and the AfDB are made to finance specific development projects and, as such, can generally be classified by sector. Loans of the IMF are made to finance balance-of-payments deficits and, as such, cannot be classified by sector.

World Bank and AfDB projects, such as those dealing with transportation, electrical power, telecommunications, water supply, and sewerage, typically involve the purchase of materials, equipment, and consulting services outside the recipient country. Other projects, such as those dealing with health, education,

[38] World Trade Organization, *Trade Policy Review of Cameroon*, Feb. 10, 1995, found at http://www.unicc.org/wto/Trade_Reviews/6_6_0_wpf.html.

[39] These commodities account for in excess of half the country's export revenues.

[40] World Trade Organization, *Trade Policy Review of Côte d'Ivoire*, June 27, 1995, found at http://www.unicc.org/wto/Trade_Reviews/6_9_0_wpf.html.

[41] Sugar accounts for about a quarter of the value of total exports by Mauritius.

[42] World Trade Organization, *Trade Policy Review of Mauritius*, Oct. 13, 1995, found at http://www.unicc.org/wto/Trade_Reviews/tprb.html.

and public sector management, are likely to involve the purchase mainly of consulting services from outside the recipient country.

The World Bank, together with the affiliated International Finance Corporation (IFC) and Multilateral Investment Guarantee Agency (MIGA), comprise the World Bank Group.[43] MIGA offers political risk guarantees in order to encourage foreign investment in its developing country members. The IFC promotes private investment in developing countries by financing private-sector projects that do not have government guarantees. As with the World Bank and the AfDB, share capital for MIGA and the IFC is provided by the member countries, which collectively determine the policies and activities of these institutions. The United States is a shareholder of both MIGA and the IFC.

The World Bank Group

The World Bank/International Development Association

The majority of World Bank loans support specific development projects and sector investor programs, but the Bank also makes policy-oriented structural and sectoral adjustment loans to assist developing countries to make the national policy changes and institutional reforms needed to improve their balance of payments and restore economic growth. The IDA, the World Bank's soft loan affiliate, provides highly concessional loans to developing countries. In 1994, 88 percent of World Bank disbursements to countries in Sub-Saharan Africa were IDA loans.[44]

The World Bank reports that just over 50 percent of its disbursements to all developing countries were for procurement of goods and services outside the recipient country in FY 1995.[45] The United States, France, Germany, Italy, and Japan were the largest supplying countries for foreign procurement with shares of 10.3, 10.3, 9.0, 8.3, and 6.8 percent, respectively.[46]

Sectoral loan commitments made by the World Bank to countries in Sub-Saharan Africa in fiscal years (FYs) 1991-95[47] are shown in table 3-3. In FY 1995, the largest loan commitments were in human resources (including education, population, health, and nutrition) with loans of $512.7 million; multi sectors, $470.9 million; agriculture, $375.1 million; power, $255.3 million; and water supply and sewerage, $248.2 million.[48]

The largest loan commitments approved in FY 1995 were for a thermal power project in Ghana ($175.6 million); a fertilizer project in Ethiopia ($120.0 million); a water project in Senegal ($100.0 million); an economic recovery project in Côte d'Ivoire ($100.0 million); and a private-sector energy project in Côte d'Ivoire ($79.8 million).[49]

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[43] Although the common objective of all the World Bank Group institutions is to help raise the standard of living in the developing countries, only the activities of the World Bank that provide development capital and related services under concessional terms are classified as development assistance.

[44] The World Bank, *World Debt Tables*, vol. 1 (Washington, DC: The World Bank, 1996), p. 217.

[45] The World Bank, *The World Bank Annual Report 1995* (Washington, DC: The World Bank, 1996), p. 37.

[46] Ibid., pp. 211-212.

[47] The World Bank's fiscal year is July-June.

[48] The World Bank, *The World Bank Annual Report 1995*, p. 59.

[49] Ibid.

Table 3-3
Sub-Saharan Africa: World Bank lending commitments to borrowers by sectors, fiscal years 1991-95

(Million dollars)

Sector	1991	1992	1993	1994	1995
Agriculture	504.9	707.4	318.3	152.6	375.1
Energy					
Oil and gas	300.0	48.5	0.0	186.20	0.0
Power	155.0	76.0	356.0	90.0	255.3
Environment	0.0	0.0	0.0	2.6	0.0
Human resources	698.7	503.2	548.6	487.1	512.7
Industry and finance					
Industry	0.0	200.0	83.5	29.6	53.0
Financial	138.8	619.9	252.3	400.1	7.2
Infrastructure and urban development					
Telecommunications	12.8	0.0	89.1	0.0	0.0
Transportation	309.5	242.8	483.0	515.0	74.8
Urban development	98.3	222.6	61.2	111.4	158.0
Water supply and sewerage	256.0	297.4	67.2	74.1	248.2
Mining and other extractive	21.0	6.0	0.00	0.00	24.8
Multi sector	887.0	936.7	453.6	711.0	470.9
Public sector management	12.2	113.1	104.5	48.2	104.3
Total	3,394.2	3,973.6	2,817.3	2,807.9	2,284.3

Note: Because of rounding, figures may not add to the totals shown.

Source: The World Bank, *World Bank Annual Report 1995*, p. 59.

In March 1996 representatives of more than 30 donor countries agreed to a new funding package for the IDA that will allow concessional lending of $22 billion to all poor countries during FYs 1997-99.[50] The 3-year funding package includes an Interim Trust Fund (ITF) for FY 1997 of about $3.0 billion, which is designed to provide additional resources to the IDA in the absence of United States funding for that year. The United States currently owes the IDA $934.5 million. As of August 1996, a bill to clear these arrears had not yet passed Congress.[51] Because the United States has announced it will not contribute to the ITF, U.S. companies will not be able to bid on procurement of goods and services for IDA projects funded through the ITF.

[50] The World Bank, "Eleventh Replenishment of IDA and the Role of the Interim Trust Fund," Jul. 18, 1996, found at http://www.worldbank.org/html/opr/procure/eleven.html.

[51] The House of Representatives approved funding of $525 million for IDA (H.R. 3540) to meet these arrears. The Senate version of this bill would provide $700 million.

However, U.S. companies will be able to bid on procurement for projects funded through other IDA resources.[52]

The Multilateral Investment Guarantee Agency

MIGA offers guarantees to protect foreign investors against losses arising from currency transfer problems, expropriation, war and civil disturbance, and breach of contract. MIGA provides long-term (up to 15 or 20 years) coverage for investments in developing countries for projects which would be otherwise difficult to insure through private insurers. As of June 30, 1995, 33 countries in Sub-Saharan Africa were MIGA members.[53] Benin, Equatorial Guinea, and Mozambique joined MIGA in FY 1995.

MIGA activities in Sub-Saharan Africa in FY 1995 included issuing its first guarantee contracts to South Africa, signing guarantee contracts with an investor for a project in Uganda, and arranging visits by MIGA staff to a number of Sub-Saharan African countries, including Gabon, South Africa, Tanzania, and Uganda, to meet with local and foreign businesses.[54] MIGA's first guarantees in South Africa were issued to Multiserv International N.V. of the Netherlands totaling $4.0 million for its equity investment in a steel slag processing plant. MIGA also insured Harsco Corp. of the United States for a $4.5 million loan by the First National Bank of Southern Africa, Ltd., to this project. MIGA issued two guarantees totaling $1.7 million to France Commodities SA, a French company, for a joint venture in Uganda. The covered project will clean, grade, and bag high-quality coffee beans for export to Europe.[55]

In addition to its guarantee program, MIGA also provides technical assistance to promote private investment opportunities in developing countries and organizes investment promotion activities. In May 1995, MIGA held a conference, in conjunction with the World Bank and the IFC, concerning the mining sector in Africa and investment opportunities.

The International Finance Corporation

The IFC promotes private investment in developing countries by financing private-sector projects that do not have government guarantees. IFC also mobilizes funds in international capital markets for developing country businesses and advises businesses and governments on investment-related matters. As of June 16, 1996, the IFC had 552 investments in Sub-Saharan Africa amounting to $2.4 billion, or 10 percent of the value of IFC investments world-wide.[56] The IFC approved $431 million in financing in 21 countries in Sub-Saharan Africa in FY 1995, or 8 percent of the IFC's total financing in that year.[57] IFC loans are made at market rates and are usually denominated in convertible currencies.

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[52] The list of projects funded through the ITF was announced in The World Bank, "Eleventh Replenishment of IDA and the Role of the Interim Trust Fund." This list includes $1.5 billion in lending for Sub-Saharan Africa.

[53] These MIGA members include: Angola, Benin, Botswana, Burkina, Cameroon, Cape Verde, Congo, Côte d'Ivoire, Equatorial Guinea, Ethiopia, Gambia, Ghana, Kenya, Lesotho, Madagascar, Malawi, Mali, Mauritania, Mauritius, Mozambique, Namibia, Nigeria, Senegal, Seychelles, South Africa, Sudan, Swaziland, Tanzania, Togo, Uganda, Zaire, Zambia, and Zimbabwe.

[54] Ibid.

[55] Ibid. MIGA reports that as of June 30, 1995, it had 28 applications for prospective investments in Africa.

[56] International Finance Corporation, "IFC Involvement by Region/ Country," found at http://www.ifc.org/DEPTS/REGION/AFRICA/PROJECTS/SUMMARY.HTM.

[57] Ibid., "Highlights of Fiscal 1995," found at http://www.ifc.org/ABOUT/HIGHENG.HTM.

In FY 1995, 60 percent of the IFC's financing for Sub-Saharan Africa was through the Africa Enterprise Fund (AEF) which provides debt and equity financing for projects with costs ranging from $250,000 to $5 million.[58] To be eligible for financing, projects must be located in IFC-member countries and have the potential to earn a satisfactory rate of return while benefiting the economy of the host country. Examples of recent AEF loans include a $1 million loan to Plantivoire in the Côte d'Ivoire to help finance the expansion of the company's bergamot[59] plant; a $400,000 loan to Combined Farmers, Ghana's largest pineapple exporters, to help finance the expansion of a pineapple farm near Accra; a $1.6 million loan to Big Game Fishing in Mauritius to finance an expansion; $100,000 to Vicoda, which supplies Nigeria's textile industry with imported raw materials and spare parts; and an $850,000 loan to Clovergem, a fish-processing company in Uganda.[60]

The IFC also operates the Africa Project Development Facility (APDF), along with the AfDB and the United Nations Development Programme, to help African entrepreneurs prepare viable projects. The APDF receives funding from these three sponsoring agencies and from the governments of 15 industrial countries.

The IFC has strong programs in South Africa and Mozambique. The agency plans to invest $10 million in Mozambique in FY 1996. In FY 1995, the IFC provided $1.6 million in equity and loans for the fishing and coke and coke tar industries in Mozambique, and it supported a market assessment on modernizing a coal-handling port for specialty coal through its Technical Assistance Trust Funds Program.[61] In FYs 1995 and 1996, the IFC approved investments of $37.3 million in equity in financial sector investments in South Africa, and it approved an investment of $600,000 for WIP Motors, a car dealership in Johannesburg.[62]

The African Development Bank Group

The African Development Bank Group consists of three institutions, the AfDB, the AfDF, and the Nigeria Trust Fund (NTF). The NTF was established by the Government of Nigeria in 1976 as a means to finance projects in some African countries at concessional rates. In addition to the 48 countries of Sub-Saharan Africa, the regional members of the AfDB include Algeria, Egypt, Libya, Morocco, and Tunisia. South Africa became a member of the AfDB in December 1995.[63]

Faced with a downgrading of the AfDB's credit rating in 1994, the nonregional members that fund the AfDF refused to replenish its capital unless new management was installed and reforms were instituted. A new AfDB president was installed in August 1995 and large cuts in employees, especially management staff, were made. At the AfDB's annual meeting in May 1996, donors agreed on a replenishment level of $1.6 billion

[58] Ibid.

[59] Bergamot is an essential oil used in the manufacture of perfume.

[60] International Finance Corporation, "Africa Enterprise Fund," found at http://www.ifc.org/DEPTS/REGION/AFRICA/AEF.HTM.

[61] International Finance Corporation, "The IFC in Mozambique," found at http://www.ifc.org/PUBLICAT/PRESS/FACTSHEE/AFRICA.HTM.

[62] Ibid., "The IFC in South Africa," found at http://www.ifc.org/PUBLICAT/PRESS/FACTSHEE/AFRICA.HTM.

[63] Currently, the 53 African countries own two-thirds of AfDB shares as against one-third for non-African members.

for the AfDF.[64] Additional funds equal to $420 million were pledged at a donors' meeting in June 1996.[65] When combined with other AfDF resources, total AfDF lending availability will amount to about $3.0 billion for 1996-98.

The United States joined the AfDB in 1982 when membership was opened to non-African countries. The United States has been a minor source of goods and services procured on AfDB loans. As of December 31, 1995, 4.5 percent of goods and services procurement had been from the United States. Regional AfDB members accounted for 43 percent of procurement (including local procurement). France, Germany, the United Kingdom, and Italy with 9.9, 7.5, 6.1 and 6.0 percent procurement shares, respectively, accounted for shares larger than that of the United States.[66]

Sectoral loan disbursements by the AfDB to countries in Sub-Saharan Africa during 1991-95 are shown in table 3-4. In 1995, the sectors receiving the largest disbursements were transport ($116.5 million in disbursements), agriculture ($112.6 million), and public utilities ($98.7 million). The drop in total disbursements in 1995 reflects the cutoff of AfDF funding. Disbursements of previously approved AfDF loans were continued even though no new loans have been made.

Table 3-4
Sub-Saharan Africa: African Development Bank Group disbursements, by sectors, 1991-95

(Million dollars)

Sector	1991	1992	1993	1994	1995
Agriculture	112.6	350.9	312.9	342.0	112.6
Industry	195.6	324.3	151.5	197.7	85.8
Multisector	57.5	253.5	389.1	203.8	23.6
Public utilities	113.4	252.7	221.3	310.7	98.7
Social	43.3	137.6	117.7	149.2	35.8
Transport	162.7	238.1	217.1	223.5	116.5
Total	685.0	1,557.1	1,409.6	1,426.9	472.9

Note.--Because of rounding, figures may not add to the totals shown.

Source: Compiled by USITC staff from statistics supplied by the African Development Bank, transmitted by facsimile, Aug. 5, 1996

The International Monetary Fund

The IMF functions as an international central bank, providing monetary reserves, usually on a short-term basis, to countries facing balance-of-payments deficits. Most such assistance is provided on conventional terms through the IMF's General Resources Account. The IMF provides longer-term concessional balance-of-payments support to low-income developing countries that face protracted balance-of-payments problems through the Structural Adjustment Facility and the Enhanced Structural Adjustment Facility.

[64] U.S. Department of State cable, "Highlights of the 1996 AfDB Annual Meeting," message reference No. 128332, prepared by U.S. Department of State, Washington, DC, June 1996.

[65] Okolo, Paul, "ECONEWS: Africa-Bank Donors Pledge $420 million U.S. Dollars for African Bank," Africa News Service (via Comtex), June 25, 1996.

[66] African Development Bank, *Compendium of Statistics* (Abidjan: AfDB, 1996), p. 60.

At the end of May 1996, Sub-Saharan African countries had outstanding IMF concessional loans of $5,295.9 million. Zambia had the largest outstanding loan balance at $1,201.9 million, followed by Ghana ($488.8 million), Uganda ($414.6 million), Kenya ($377.1), and Côte d'Ivoire ($343.5 million).[67]

Net IMF concessional loan disbursements to Sub-Saharan African countries in 1995 amounted to $1,543.5 million, up from $461.3 million in 1994 and from $126.5 million in 1993.[68] The relatively large increases in disbursements in 1994 and 1995 were largely driven by loans to a small number of countries. Loans to Côte d'Ivoire, Sierra Leone, and Zimbabwe accounted for 53 percent of concessional IMF loan disbursements in 1994, and a loan to Zambia accounted for 67 percent of disbursements in 1995.

Special Debt Initiative

The IMF and the World Bank have proposed an initiative to provide special assistance for heavily indebted poor countries, most of which are in Sub-Saharan Africa. This initiative would encompass existing debt relief mechanisms, such as the Naples terms[69] applied by the Paris Club, and bring in non-Paris Club bilateral creditors, commercial creditors, and multilateral creditors. Annual debt-service payments would be reduced while the debtor country pursues structural adjustment. Successful reform would lead to substantial debt forgiveness on the part of participating creditors at the end of 3 or 6 years. Sixteen countries in Sub-Saharan Africa have been identified as possibly qualifying for this initiative.[70] Drawbacks to implementing the initiative include gaining the participation of all creditors and the financing of the debt stock reduction.[71]

Paris Club Debt Relief[72]

During FY 1995, the United States provided debt relief to Sub-Saharan Africa under the Paris Club mechanism. The Paris Club is an international forum where the creditor nations issue, insure, as well as reschedule their loans. The Paris Club mechanism intends to maximize collections on outstanding loans from countries experiencing debt service difficulties. During grace periods, granted as part of the rescheduling agreements, beneficiary debtor nations are expected to undertake economic adjustment programs aimed at improving their ability to service their debts. Following the conclusion of an *ad referendum* agreement among Paris Club members on debt rescheduling, each member country negotiates bilateral agreements with each debtor country to finalize the specific details.

In 1988, the Paris Club recognized that many of the poorest countries would never be able to service fully their external debt, even with repeated rescheduling and significant economic reforms. As a result, the Paris

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[67] Dollar amounts have been converted from Special Drawing Rights (SDRs) at the rate of 1SDR=$1.4422, the conversion rate of May 31, 1996.

[68] International Monetary Fund, *International Financial Statistics*, June 1996.

[69] The Naples terms for debt stock reduction allows for a 67-percent reduction in debt stock or in future debt service payments on a present-value basis on a country's eligible pre-cut-off-date Paris Club debt. See The World Bank, *World Debt Tables*, vol. 1, p. 33.

[70] International Monetary Fund, "IMF Work Advances on Debt Initiative for the Poorest Countries," *IMF Survey*, July 15, 1996, pp. 229-234. The 16 countries include Burundi, Cameroon, Congo, Côte d'Ivoire, Ethiopia, Guinea-Bissau, Madagascar, Mozambique, Niger, Rwanda, São Tomé and Principe, Sudan, Tanzania, Uganda, Zaire, and Zambia. The debt status of Liberia, Nigeria, and Somalia has not yet been determined.

[71] Ibid.

[72] Information on U.S. debt relief was provided by the Office of International Debt Policy of the U.S. Treasury Department, through a facsimile transmission to USITC staff dated Aug. 1, 1996.

Club introduced options for debt and debt service reduction for those countries. The terms currently used for such debt relief, the so-called "Naples Terms," adopted in December 1994, allow creditors to reduce debt service and debt stock up to 67 percent for eligible countries on a case-by-case basis.

During FY 1995, bilateral agreements between the United States and six Sub-Saharan African countries entered into force, representing a total of $188.7 million in nonconcessional debt. The distribution of this sum among the affected countries was as follows: Cameroon ($14.2 million); Central African Republic ($5.1 million); Congo ($12.0 million); Côte d'Ivoire ($115.4 million); Gabon ($40.3 million); and Sierra Leone ($1.7 million). U.S. budget costs associated with potential debt reduction cannot be precisely determined before the implementation of particular bilateral agreements. Debt rescheduling does not incur budget costs.

U.S. Bilateral Economic and Trade Policies Affecting Sub-Saharan Africa

Developments in U.S. economic and trade assistance programs during 1995 and 1996 are discussed in the following sections.

The Export-Import Bank of the United States[73]

Eximbank provides assistance to U.S. exporters through export loans, loan guaranties, and export credit insurance. To qualify for Eximbank support, a country to which a U.S. company proposes to export must be sufficiently creditworthy; that is, it must be able to generate sufficient levels of convertible currency, either through exports or through borrowing, to allow its importers to pay their U.S. vendors.

Eximbank support (the dollar sum of outstanding loans and loan guarantees) in Sub-Saharan Africa declined from $3.2 billion as of December 31, 1994, to $2.8 billion, or 5.9 percent of its worldwide exposure of $47.5 billion, as of December 31, 1995 (table 3-5).[74] At the end of 1995, nine countries in Sub-Saharan Africa were eligible for all Eximbank programs and four others were eligible for some programs.[75] Eximbank support is relatively important for the region, considering that it accounts for only one percent of U.S. exports.

The extent of delinquency on Eximbank loans and loan guarantees underlines the adversity of economic conditions in Sub-Saharan Africa. As of December 31, 1995, 17 countries of the region were delinquent on Eximbank credits. The delinquency on credits extended to Sub-Saharan markets accounted for 69.7 percent of total delinquency on Eximbank credits.

[73] Information on Eximbank's 1995 activities is based on facsimile transmissions received by USITC staff from the agency dated July 11 and 14, 1996.
[74] See USITC, *U.S.-Africa Trade Flows and Effects of the Uruguay Round*, USITC publication No. 2938, pp. 3-35 for Eximbank exposure in Sub-Saharan Africa as of Dec. 31, 1994.
[75] Kenya became eligible for some Eximbank programs in 1995.

Table 3-5
Sub-Saharan Africa: Export-Import Bank (Eximbank) exposure[1] as of Dec. 31, 1995, delinquency[2] and availability for further support[3] at yearend 1995

Country	Exposure on Dec. 31, 1995	Delinquency on Dec. 31, 1995	Availability on Dec. 31, 1995
Angola	$7,291,719	0	No
Benin	0	0	P.A.
Botswana	0	0	Yes
Burkina Faso	3,162,879	0	No
Burundi	0	0	No
Cameroon	94,940,595	$3,420,525	No
Cape Verde	0	0	No
Central African Republic	7,805,094	481,335	No
Chad	0	5,300,000	No
Comoros	0	0	No
Congo	11,815,103	0	No
Côte d' Ivoire	193,817,009	0	No
Djibouti	0	0	No
Equatorial Guinea	0	0	No
Eritrea	0	0	No
Ethiopia	0	0	No
Gabon	81,099,603	3,450,462	P.A.
Gambia	0	0	No
Ghana	13,508,160	0	Yes
Guinea	8,756,743	2,156,891	No
Guinea-Bissau	0	0	No
Kenya	77,795,003	11,761,553	P.A.
Lesotho	340,000	0	Yes
Liberia	5,980,110	9,494,298	No
Madagascar	24,366,996	21,224,237	No
Malawi	0	0	No
Mali	0	0	No
Mauritania	6,596,857	0	No
Mauritius	3,846,996	0	Yes
Mozambique	48,589,816	63,306	No
Namibia	0	0	Yes
Niger	6,821,520	612,320	No
Nigeria	752,148,773	359,905,499	L
Rwanda	232,182	826,986	No
São Tome' and Principe	0	0	No
Senegal	1,594,390	0	No
Seychelles	1,193,100	0	Yes
Sierra Leone	12,529,959	0	No
Somalia	0	0	No
South Africa	213,824,830	0	Yes
Sudan	28,246,331	43,952,618	L
Swaziland	0	0	Yes
Tanzania	27,010,133	997,196	No
Togo	2,820	0	No
Uganda	5,301,923	1,450,282	P.A.
Zaire	921,830,191	829,615,929	No
Zambia	146,971,848	5,439,262	No
Zimbabwe	117,530,811	0	Yes
Total	2,824,951,494	1,300,152,699	

[1] Exposure = Authorization of all forms of support minus repayment.
[2] Arrears in the repayment of principal.
[3] Yes=Available for all 6 types of financing: short, medium, and long term, for both private and public buyers of U.S. goods and services; No=Not available for any of the 6 types for economic reasons; P.A.=Not available for at least one of the 6 types for economic reasons; L=Support is legally prohibited.

Source: Eximbank.

In countries where economic conditions disallow routine functioning, Eximbank is allowed to support (1) private sector borrowers with a strong record of independent access to private international capital markets; (2) private projects that are insulated effectively from government involvement and able to generate convertible currency earnings through offshore payments and/or escrow mechanisms: and (3) long-range aircraft leases, when the airline's country of registry is a signatory to international conventions protecting aircraft property rights. Programs quoted in the last Commission report continued during 1995.[76]

U.S. Trade and Development Agency[77]

TDA programs in Sub-Saharan Africa assist U.S. firms by identifying major development projects that offer large export potential and by funding U.S. private sector involvement in project planning. In 1995, TDA began to require reimbursements of its contributions to successful projects. This so-called "success fee" is collected after the U.S. beneficiary of TDA's support implements its project. The new measure aims at making the agency increasingly self-supporting.

TDA obligations in Sub-Saharan Africa amounted to $3.9 million during FY 1995, up from $2.8 million in FY 1994 (table 3-6).[78] Total FY 1995 obligations to the region were an estimated $4.7 million, if the Sub-Saharan portion of joint projects with Middle Eastern countries are also counted.

The time lag between funding project planning activities and the possibility of identifying actual export sales associated with the project varies widely. The 1995 grant of $500,000 to develop the Ethiopian sugar industry and the $200,000 grant to develop VSAT communications in South Africa began to generate export sales during 1995. The Ethiopian project led to $52 million in U.S. exports and the South Africa project led to $45 million exports by yearend 1995. However, for many projects, the generation of exports does not begin in the year in which the assistance is extended. Examples of such projects are a $44,000 grant extended in 1993 to develop road transportation in Swaziland, and a $149,000 grant extended in 1992 to develop the railway systems in and among several African countries.[79] The first project had generated $9 million and the second one $40 million in U.S. exports by the end of 1995.

Overseas Private Investment Corporation[80]

OPIC is a self-sustaining U.S. Government agency that provides investment information, financing, and political risk insurance for U.S. investors in countries eligible for its support. OPIC finances new investments or modernization of existing production or service facilities through both direct loans and loan guarantees. Whereas direct loans are reserved for smaller projects, generally ranging from $2 million to $30 million, loan guarantees are used for larger projects ranging from $10 million to $200 million. OPIC offers insurance against currency inconvertibility, expropriation, and political violence.

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[76] See, USITC, *U.S.-Africa Trade Flows and Effects of the Uruguay Round Agreements and U.S. Trade and Development Policy*, USITC publication No. 2938, pp. 3-35 and 3-36.

[77] Information on TDA's 1995 activities is based on facsimile transmissions received by USITC staff from the agency dated July 3, 1996; and on TDA's 1995 public reports.

[78] See USITC, *U.S.-Africa Trade Flows and Effects of the Uruguay Round*, USITC publication No. 2938, pp. 3-36 to 3-41 for information on TDA's FY 1994 activities.

[79] For reference to these two projects, see ibid., table 3-13. The countries involved in the regional grant to develop railways were Ghana, Kenya, Mozambique, Nigeria, Tanzania, Uganda, Zambia, and Zimbabwe.

[80] Information on OPIC's 1995 activities is based on facsimile transmissions received by USITC staff from the agency dated July 17, 1996.

Table 3-6
Sub Saharan Africa: Trade and Development Agency assistance, by countries and activities, FY 1995

Country	Activity[1]	Classified	Obligation
Angola	Fish processing plant	DS	$2,500
Côte d' Ivoire	Multi-purpose tugboat	OV	38,691
	Vridi I power station modernization	DS	2,400
Eritrea	Integrated sugar production facility	FS	295,000
Ethiopia	Finchoo turn-key sugar operations	T	500,000
	Plastics factory upgrade	DS	2,500
	Plastics factory upgrade	FS	125,000
Gabon	Cellular and telephone switching systems	DS	3,732
Ghana	Natural gas reserves and power plant	DS	2,500
Mauritius	Bagasse power generation	DS	1,000
Mozambique	Aluminum smelter complex	FS	675,000
	Sugar production and processing	OV	27,200
Niger	Kandadji dam hydroeletric power plant	DM	23,097
Senegal	Goree Island hotel complex	FS	150,000
South Africa	Telecommunication officials	OV	11,000
	VSAT voice and data communications	T	200,000
	Glycol processing facility	DS	2,500
	Glycol processing facility	FS	155,000
	Food processing facility expansion	DS	2,500
	Outreach clinic	DS	2,500
	Dredging equipment	OV	41,845
	Rural telephony project	DS	2,416
	Health care procurement officials	OV	82,520
	Health care procurement officials briefing	TA	10,000
Swaziland	Cellular and data transmission system	FS	261,000
	Swaziland/Mozambique power transmission interconnector	DS	2,500
	Swaziland/Mozambique power interconnection	FS	295,000
Uganda	Telecom services market assessment	DS	2,500
Zambia	Itezhi-Tezhi hydroeletric power	DS	2,145
Zimbabwe	Automated frequency management system	T	100,000
African regional	African Development Bank FS fund	O	186
	Aviation officials	OV	47,228
	Locomotive rehabilitation facility	DM	24,974
	Locomotive rehabilitation facility	FS	195,000
	African power conference	TS	129,524
	African power conference support	TA	23,173
	Financial wide area network	DS	2,500
	Eastern and Southern Africa financial wide area network	FS	235,000
	SADC regional trade clearing operation	DS	5,000
	African petroleum industry	OV	88,024
	Africa cellular telecommunication	OV	88,000
	Senegal/Côte d' Ivoire power plants	DM	24,084
Total			3,884,739

[1] Activities are classified in the following main forms: Desk studies (DS); Definitional missions (DM); Feasibility studies (FS); Technical assistance (TA); Orientation visits (OV); Grants (G); Training (T); Technical symposium (TS), and Other (O).

Source: U.S. Trade and Development Agency.

OPIC operates programs in countries with which it has an investment agreement. OPIC currently does not have agreements with two countries in Sub-Saharan Africa--Comoros and Seychelles. During FY 1995, OPIC programs were suspended in 5 countries--Gambia, Liberia, Mauritania, Nigeria, and Sudan. OPIC programs were suspended in Burundi in FY 1996.[81]

During FY 1995, OPIC support in Sub-Saharan Africa amounted to $173.7 million, down from $236.5 million in FY 1994.[82] OPIC extended support to the following projects in Sub-Saharan Africa in FY 1995: Equatorial Guinea, liquid petroleum gas plant ($9.5 million); Ethiopia, sugar refinery, ($47.7 million); Ghana, soft drink bottling ($12.5 million) and gold mining ($54.0 million); Guinea, bauxite mining ($7.4 million); Mozambique, consultancies ($1.5 million); South Africa, financial services ($17.1 million) and auto-emission pollution control ($18.0 million); and Tanzania, financial services ($6.0 million). OPIC projects approved during 1995 are projected to generate $49.8 million in U.S. exports during a 5-year period following approval.

OPIC established the New Africa Opportunities Fund (NAOF) in 1995. The NAOF is a privately managed equity fund designed to encourage the development of entrepreneurship in South Africa and neighboring countries and to support the process of privatization in the region. With a capitalization of $120 million, and managed by the Sloan Financial Group, Inc., the NAOF is to be used to insure U.S. investments in South Africa and neighboring countries.

The U.S. Generalized System of Preferences

The GSP program provides duty-free treatment for imports of eligible articles from designated beneficiary developing countries in order to (1) promote economic development in developing and transitioning economies through increased trade; (2) reinforce U.S. trade policy objectives by encouraging beneficiaries to open their markets, comply more fully with international trading rules, and assume greater responsibility for the international trading system; and, (3) help maintain U.S. international competitiveness by lowering costs for U.S. business, as well as lowering prices for American consumers.[83]

To qualify for GSP privileges, each beneficiary country must meet various eligibility requirements. These include market access, worker rights, and intellectual property rights. The GSP statute excludes certain products from eligibility. As noted in chapter 2, most footwear, textiles and apparel, and energy products are excluded. Each year, the Trade Policy Staff Committee (TPSC) conducts a review process in which products can be added to or removed from the GSP program, or in which a beneficiary's compliance with the eligibility requirements can be reviewed.[84] In 1995, the TPSC began the annual GSP review, but it was suspended when

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[81] OPIC programs in Liberia, Mauritania, and Sudan are suspended due to a lack of internationally recognized worker rights. Programs in Gambia and Burundi are suspended due to military coups that overthrew democratically-elected governments. Programs in Nigeria are suspended due to foreign policy infractions, human rights abuses, and lack of appropriate drug enforcement practices. USITC staff telephone conversation with OPIC official, Sept. 10, 1996.

[82] For details on annual levels of OPIC support in 1994, see table 3-12 in USITC, *U.S.-Africa Trade Flows and Effects of the Uruguay Round*, USITC publication 2938.

[83] The GSP program is authorized by Title V of the Trade Act of 1974, as amended (19 U.S.C. 2461 et seq.). For a description of the program, see USTR, *A Guide to the U.S. Generalized System of Preferences (GSP)* (Washington, DC: USTR, 1991).

[84] The TPSC is a committee coordinated by the USTR and composed of relevant U.S. government agencies.

the program expired on July 31, 1995. A bill to renew the program was introduced in 1995[85] and approved as part of the Budget Reconciliation Act that was vetoed by the President.[86] On August 20, 1996, the President signed legislation to amend and extend the program until May 31, 1997.[87] The new legislation authorizes the U.S. Department of the Treasury to reimburse eligible importers for duties paid on GSP-eligible products since August 1, 1995.

The new legislation authorizes the President to add import-sensitive products to the list of GSP-eligible items if the article is a product of a least developed country, provided that such imports have only a minimal impact on the U.S. industry. The new program also allows products granted exemption from duty-free access under an import sensitivity petition to keep that status for 3 years. Moreover, petitions to add products previously exempted are prohibited for the following 2 years. Finally, the new program enhanced the Administration's discretionary authority to enforce intellectual property rights.

U.S. Bilateral Economic Assistance

U.S. bilateral economic assistance to Sub-Saharan Africa amounted to $1.5 billion in FY 1995, down from $1.6 billion in FY 1994.[88] This assistance includes $869.8 million in Development Assistance, $555.4 million in food assistance, $116.9 million in disaster assistance and $5.0 million in Economic Support Funds.

Until FY 1996, Development Assistance programs for Sub-Saharan Africa were funded through the Development Fund for Africa (DFA) as well as USAID's general Development Assistance Fund (DAF). Earmarked funding for Development Assistance to Sub-Saharan Africa through the DFA was discontinued by Congress in FY 1996, and such programs are now funded through the DAF. Development Assistance programs for Sub-Saharan Africa are estimated to decline to $627.9 million in FY 1996. ■

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85 See GSP Renewal Act of 1995 (H.R. 1654), introduced by Mr. Crane and Mr. Rangel on May 17, 1995.

86 See section 11801 et seq. of the Seven-Year Balanced Budget Reconciliation Act of 1995 (H.R. 2491), which was vetoed on Dec. 6, 1995.

87 Public Law 104-188.

88 Facsimile received by USITC staff from USAID official, Sept. 5, 1996.

CHAPTER 4
Trade and Economic Policies Affecting U.S.-Sub-Saharan Africa Trade and Investment in Major Sectors

This chapter summarizes developments during 1995-96 with respect to the Uruguay Round Agreements (URA) and to specific economic and trade policies likely affecting U.S.-Sub-Saharan Africa trade flows and investment in major sectors. The sector summaries provide, to the extent available, information on the following: (1) changes in tariff and nontariff barriers in the United States and in major sector trading partners, (2) developments in U.S. trade and economic policies, including the level of trade entering under the Generalized System of Preferences (GSP), (3) economic and trade developments in major Sub-Saharan African trading partners, and (4) developments in multilateral lending to major sector trading partners.

As noted in the first Commission report on U.S.-Africa trade flows,[1] many countries in Sub-Saharan Africa have been implementing sector-specific policy changes, such as easing or lifting price and trade controls, privatizing state-run enterprises, initiating land reform, and implementing economy-wide changes, such as establishing strengthened business codes and more liberalized foreign investment rules, and easing foreign exchange controls. Improvements in regional infrastructure have also continued, much of it assisted through multilateral lending and investment guarantee programs. These developments are likely to increase U.S.-Sub-Saharan Africa trade and investment flows.

Agricultural Products[2]

Overview

U.S. exports of agricultural products to Sub-Saharan Africa amounted to $936.3 million in 1995, representing a rise of 20 percent over 1994 exports, while imports registered a minor increase to $686.6 million. The net U.S. trade balance improved by 165 percent, reaching a surplus of $249.7 million.

[1] U.S. International Trade Commission (USITC), *U.S.-Africa Trade Flows and Effects of the Uruguay Round Agreements and U.S. Trade and Development Policy*, USITC publication 2938, Jan. 1996.

[2] The agricultural products sector includes live animals; animal products; vegetable products; animal or vegetable fats and oils and their cleavage products; prepared edible fats; animal or vegetable waxes; prepared foodstuffs; beverages, spirits, and vinegar; tobacco and manufactured tobacco substitutes; raw hides and skins, leather, and furskins; wool and fine or coarse animal hair; and, cotton.

Major U.S. agricultural export markets in the region in 1995 include South Africa, Nigeria, Ethiopia, Ghana, and Côte d'Ivoire, as shown below (million dollars):

South Africa	278.1
Nigeria	117.2
Ethiopia	62.9
Ghana	46.5
Côte d'Ivoire	38.0
All other	393.6
Total	936.3

Leading agricultural export items to the region include grains, fats, and oils. A significant portion of such exports benefit from U.S. export promotion and food assistance programs.

The leading U.S. agricultural import suppliers in the Sub-Saharan Africa region in 1995 include Côte d'Ivoire, South Africa, Ghana, Kenya, and Madagascar, as shown below (million dollars):

Côte d'Ivoire	168.8
South Africa	138.8
Ghana	58.7
Kenya	48.6
Madagascar	38.5
All other	233.2
Total	686.6

The leading import items include tropical products, such as cocoa products, coffee, and vanilla beans. Sugar and tobacco are also major U.S. agricultural import items from Sub-Saharan Africa; these commodities are subject to import quotas but are eligible for duty-free treatment under the GSP.

Since the last Commission report, there has been progress within the Sub-Saharan Africa region in economic reforms and market liberalization. In the United States, there has been a shift in emphasis away from direct aid toward market forces in the agricultural export sector, as agricultural export subsidies are phased down. The prospect of lower agricultural export supplies and higher global food prices is a concern to the net food importing countries in Sub-Saharan Africa. This concern is currently being addressed by the WTO.[3]

[3] See Decision on Measures Concerning the Possible Negative Effects of the Reform Programme on Least-Developed and Net Food-Importing Developing Countries, Final Act Embodying the Results of the Uruguay Round of Multilateral Trade Negotiations.

URA Developments Affecting Sector Trade and Investment

Tariff Changes

The share of U.S. imports of agricultural products from the Sub-Saharan Africa region that are dutiable fell from 16.9 percent to 12.6 percent during 1994-1995. This decline resulted from a rise in imports of cocoa beans, which are free of duty. In terms of leading Sub-Saharan African suppliers, the share of U.S. agricultural imports subject to duties ranged from a low of 0.1 percent for Ghana to 27 percent for South Africa.

The U.S. average trade-weighted tariff (ATWT) for imports of agricultural products from Sub-Saharan Africa was 8.2 percent ad valorem equivalent (AVE) in 1995, down from 15.5 percent AVE the previous year. This 47 percent decline largely resulted from the decline in the share of dutiable imports discussed above. The ATWTs applied to leading Sub-Saharan Africa suppliers of U.S. agricultural imports from the region in 1995 are shown below (percent AVE):

Côte d'Ivoire	2.9
South Africa	4.5
Ghana	6.8
Kenya	2.0
Madagascar	9.9
Average, Sub-Saharan Africa	8.2

As a result of the URA, tariff and quota commitments were made by 20 Sub-Saharan African countries.[4] As a result of provisions in various URA agreements and decisions giving special and differential treatment to developing and least developed countries, developing Sub-Saharan African WTO members have a period of up to 10 years to implement reduction commitments (at two-thirds the reduction rate of developed countries) and least-developed Sub-Saharan African members are not required to make commitments. Table 4-1 shows Uruguay Round (UR) Sub-Saharan African country tariff rate concessions for agricultural products.

Many Sub-Saharan African countries were required only to bind agricultural tariffs in 1995, with no commitment to further reductions, while others committed to significantly reduced tariffs over varying periods. The most liberalized tariff reduction commitments were made by South Africa, Namibia, and Swaziland, followed by Côte d'Ivoire, Zimbabwe, and Ghana. For example, South Africa reduced or eliminated tariffs on poultry products in July 1995[5] and eliminated luxury surcharges on imports in October 1995.[6] Nigeria removed various agricultural items from an import prohibition list and established tariff breakouts for these items in February 1995.[7]

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[4] Schedules containing such commitments were submitted to the WTO by Nigeria, Gabon, Senegal, Madagascar, Côte d'Ivoire, Zimbabwe, South Africa, Zambia, Namibia, Cameroon, Ghana, Kenya, Mauritius, Swaziland, Benin, Mauritania, Niger, Congo, Tanzania, and Uganda.

[5] U.S. Department of State cable, "Poultry," message reference No. SF5027, prepared by U.S. Embassy, Pretoria, July 10, 1995.

[6] U.S. Department of State cable, "Agricultural Situation," message reference No. SF5011, prepared by U.S. Embassy, Pretoria, Mar. 20, 1995. Surcharges had ranged from 15-40 percent ad valorem on agricultural items.

[7] U.S. Department of State cable, "Agricultural Situation," message reference No. NI5011, prepared by U.S. Embassy, Lagos, Sept. 30, 1995. Items include baby chicks, beer, wines, spirits, water, fruits and fruit juices, rice,

(continued...)

Table 4-1
Sub-Saharan Africa: Tariff concessions for agricultural products under the Uruguay Round, by country

Country	Bound tariffs	Implementation period	Other duties and charges
	Percent ad valorem	*Year*	*Percent ad valorem*
Benin	60-100	1995	19
Cameroon	80	1995	230
Congo	30	1995	-
Côte d' Ivoire	4-64	1995-2004	200
Gabon	60	1995	200
Ghana	40-99	1995-2004	-
Kenya	100	1995	-
Madagascar	30	1995	250
Mauritania	25-75	1995	15
Mauritius	37-122	1995	-
Namibia	0-597	1995-2000	([1])
Niger	50-200	1995	50
Nigeria	80	1995	80
Senegal	30	1995	150
South Africa	0-597	1995-2000	([1])
Swaziland	0-597	1995-2000	([1])
Tanzania	120	1995	120
Uganda	40-70	1995	-
Zambia	45-125	1995	-
Zimbabwe	25-150	1995-2004	15

[1] Includes provisions for both a normal levy and a special levy.

Source: Various schedules of the Uruguay Round of Multilateral Trade Negotiations, *Legal Instruments Embodying the Results of the Uruguay Round of Multilateral Trade Negotiations Done at Marrakesh on 15 April 1994.*

Other URA Developments

The United States has long maintained tariff rate quotas for imports of sugar and tobacco, both of which are major U.S. agricultural import items from Sub-Saharan Africa. Quota allocations for sugar during fiscal years (FYs) 1995 and 1996 were held by Congo, Côte d'Ivoire, Gabon, Madagascar, Malawi, Mauritius, Mozambique, South Africa, Swaziland, and Zimbabwe.[8] Allocations for these countries during FY 1996 totaled 220,764 metric tons, raw value, or 10 percent of the global allocation.[9] The largest allocations were held by South Africa (23 percent of the Sub-Saharan African total), Swaziland (16 percent), and Mozambique (13 percent).

[7] (...continued)
tobacco products, tomato paste, confectioneries, and non-carbonated beverages.

[8] Office of the U.S. Trade Representative (USTR), "USTR Announces Allocation of Tariff-Rate Quota for Raw Cane Sugar," press release 96-49, June 13, 1996, found at http://www.ustr.gov/releases/1996/96-49.html.

[9] Ibid. Quantities include additional allocations.

The United States imposed a tariff rate quota on imports of leaf tobacco in September 1995.[10] Quota allocations were granted to Malawi and Zimbabwe (12,000 metric tons each, representing 16 percent of the global quota). The establishment of the quota terminated the so-called Ford Amendment.[11] The tariff rate quota reportedly has affected Malawi, which diverted tobacco exports to other markets.[12]

Under the UR Agreement on Agriculture, the United States committed to reduce export assistance programs during 1995-2000 by 36 percent in terms of budgetary outlays and 21 percent in quantity compared with the average level during 1986-90.[13] However, recent U.S. funding levels have been below the allowable levels and export assistance programs are not expected to be significantly affected by the UR. Commitments under the URA regarding the reduction of nontariff measures (generally quotas) affecting agricultural products were made by Senegal, South Africa, Namibia, Cameroon, and Swaziland.[14]

Developing and least developed countries, including those in Sub-Saharan Africa, are exempt under the UR Agreement on Agriculture from requirements to reduce many domestic support and export subsidy programs and are subject to lower requirements for others. One major commitment was by South Africa regarding its General Export Incentive Scheme (GEIS). South Africa notified the WTO Committee on Subsidies and Countervailing Measures that the GEIS would be scaled back effective April 1, 1995, and will be eliminated by December 31, 1997.[15] In the past, agricultural products such as chilled meat, chilled fruit, canned fruit, wine, and packaged dried fruit benefited from the program.[16]

Economic and Trade Policies Affecting U.S.-Sub-Saharan Africa Trade and Investment

U.S. Policies

In addition to the GSP program, other programs affecting trade and investment between the United States and Sub-Saharan Africa include a number of export and trade contact programs administered by the U.S. Department of Agriculture (USDA) to facilitate U.S. agricultural exports. Other programs affecting such trade and investment include food assistance programs operated by the U.S. Agency for International Development (USAID), domestic agricultural legislation, and development programs run by the U.S. Trade and Development Agency (TDA) and the Overseas Private Investment Corporation (OPIC). The value of trade or expenditures for various U.S. programs affecting agricultural trade and investment with respect to Sub-Saharan Africa in FY 1995 is shown below (million dollars):

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[10] USTR, "Tobacco Import Tariff-Rate Quota Proclamation Signed by President Clinton," press release 95-66, Sept. 13, 1995, found at ftp://ftp.ustr.gov/pub/press/releases/1995/09/95-66.

[11] Section 1106 to the Omnibus Budget Reconciliation Act of 1993 (Public Law 103-66, 107 Stat. 312, 318). The Ford Amendment required minimum domestic content requirements for cigarettes and imposed assessments and fees on imports.

[12] U.S. Department of State cable, "USITC Study on Africa," message reference No. 003246, prepared by U.S. Embassy, Lilongwe, July 30, 1996.

[13] Agreement on Agriculture, Article 1(f); Article 9 2.(b)(iv), Final Act Embodying the Results of the Uruguay Round of Multilateral Trade Negotiations.

[14] Determined from examining the countries' schedules of tariff and quota commitments.

[15] WTO notification, document G/SCM/N/2/ZAF, May 21, 1995.

[16] Announcement by Mr. G. J. J. Breyl, Acting Director-General, Department of Trade and Industry, Republic of South Africa, media release, Sept. 15, 1994.

Generalized System of Preferences	81.5[1]
GSM-102	32.0
Export Enhancement Program	33.0
Dairy Export Enhancement Program	2.0
Market Access Program	110.0
Foreign Market Development	20.8
Emerging Markets Program	.6
Food Assistance	555.4
U.S. Trade Development Agency	.3
Overseas Private Investment Corporation	60.2

[1] Calendar year.

These programs are discussed in greater detail below.

Generalized System of Preferences

U.S. imports of agricultural products under the GSP from major sources in Sub-Saharan Africa in 1995 are shown below (million dollars):

South Africa	24.5
Mozambique	20.1
Zimbabwe	8.0
Côte d'Ivoire	7.5
Swaziland	6.1
All other	15.3
Total	81.5

Sugar was, by far, the principal agricultural item imported under the GSP from the Sub-Saharan African region in 1995, accounting for 60 percent of the regional total. Other leading commodities included leather (12 percent) and cocoa paste (11 percent). The share of total U.S. agricultural imports from the Sub-Saharan Africa region entered under GSP was about 12 percent in 1995, down from 16 percent in 1994. There was a wide variation in this share among individual supplying countries.

Export Programs

U.S. agricultural export programs include the GSM-102[17] export guarantee program, the Export Enhancement Program (EEP), and the Dairy Export Enhancement Program (DEIP). U.S. exports of agricultural products to the Sub-Saharan Africa region under the GSM-102 program in FY 1995 totaled $32 million, an increase of 199 percent over the level in FY 1994.[18] The principal commodities included soybeans ($23.0 million), white corn ($4.3 million), poultry meat ($3.5 million), and wheat ($1.4 million). Exports under GSM-102

[17] The GSM-102 program provides short-term credit guarantees for financing terms of up to 3 years. Longer term credit guarantees (3-10 years) are provided by the GSM-103 program; no U.S. exports of agricultural products to Sub-Saharan Africa were made under GSM-103 in FY 1995.

[18] U.S. Department of Agriculture, Foreign Agricultural Service, Notice to Recipients, May 20, 1996, received by facsimile.

to the region in FY 1995 accounted for 1.3 percent of the value of total exports under the program and 3.4 percent of the value of total U.S. agricultural exports to the region in 1995. The GSM-102 program was amended for FY 1996 to include the eligibility of exports of oilseeds (soybeans, cottonseeds, peanuts, and sunflower seeds) to the West Africa region.[19]

Bonus award payments for U.S. agricultural exports to Sub-Saharan Africa under the EEP and the DEIP during FY 1995 totaled $33 million and $2 million , respectively.[20] By far, the principal commodity exported under the EEP to Sub-Saharan Africa was wheat (96 percent of the total), with relatively smaller amounts of exports of barley malt, wheat flour, and frozen poultry. The leading commodity exported to the region under the DEIP was nonfat dry milk (73 percent of the total), followed by whole milk powder, butter, and anhydrous milkfat. The Sub-Saharan Africa region accounted for a relatively small share of total EEP and DEIP bonus awards in FY 1995, ranging from 13.2 percent of the value of total awards for wheat to 0.7 percent for frozen poultry.[21] The region accounted for 9.8 percent of the value of total EEP program awards and 1.1 percent of total DEIP program awards that year.

Market Development Programs

The USDA recently renamed the Market Promotion Program the Market Access Program (MAP).[22] Annual set aside funding for the MAP, which totaled $100 million in FY 1994 and $110 million in FY 1995, is scheduled to decline to $90 million annually during FYs 1996-2002. Annual set aside funding of the Foreign Market Development (FMD) program declined from $31.4 million in FY 1994 to $20.8 million in FY 1995; such funding is slated to increase to $24 million in FY 1996.[23] As in previous years, South Africa was the major regional beneficiary of U.S. agricultural market development programs during FY 1995, accounting for 78 percent of current FMD spending and 85 percent of MAP spending in Sub-Saharan Africa. The higher share of MAP spending likely reflects South Africa's relatively high regional income level and the emphasis of the MAP on relatively higher priced, value-added products.

The Emerging Markets Program[24] (EMP), which provides trade credits, market development funds, and technical assistance to eligible countries, was authorized by the Federal Agricultural Improvement and Reform Act of 1996 (Public Law 104-127), which became effective April 4, 1996. The new name reflects a shift in emphasis from geo-political considerations that previously targeted the Newly Independent States

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[19] U.S. Department of Agriculture, Foreign Agricultural Service, press release PR 0275-96, June 28, 1996.

[20] Data from the U.S. Department of Agriculture, Foreign Agricultural Service, Commodity Credit Corporation. The program provides cash bonuses to allow U.S. exporters to sell U.S. agricultural products in targeted countries at prices below cost in order to challenge unfair trade practices, encourage negotiations to eliminate these practices, and to expand U.S. agricultural exports. No U.S. exports to Sub-Saharan Africa benefitted from awards under the Cottonseed Oil Assistance Program (COAP) or the Soybean Oil Assistance Program (SOAP) during FY 1995 (per telephone conversation with an official of the Commodity Credit Corporation, July 16, 1996). The COAP and SOAP programs were not reauthorized under the Federal Agricultural Improvement and Reform Act of 1996 (Public Law 104-127), which became effective April 4, 1996.

[21] Eligible commodities for which no EEP or DEIP bonus awards were made for Sub-Saharan Africa in FY 1995 include barley or malting barley, eggs, feed grains, frozen pork, rice, butter oil, cheddar cheese, mozzarella cheese, and processed American cheese.

[22] The change was part of Title II of the Federal Agricultural Improvement and Reform Act of 1996 (Public Law 104-127), which became effective Apr. 4, 1996.

[23] USITC staff telephone conversation with an official of the U.S. Department of Agriculture, July 23, 1996. MAP funding levels are specified by Congress, while FMD funding levels are discretionary by the Foreign Agricultural Service.

[24] Previously this program was known as the Emerging Democracies Program

of the Former Soviet Union to economic and market potential in emerging markets.[25] The main criteria in targeting countries under the new program are positive economic growth factors, a substantial population (1 million or more), and an annual per capita income level of $8,355 or less. During FY 1995,[26] expenditures in Sub-Saharan Africa under the EMP totaled $600,000. Of this amount, South Africa received $485,000 (81 percent of the total), Namibia $61,000 (10 percent), and Ghana $54,000 (9 percent). Obligations for FY 1996 include $445,000 in fellowships under the Cochran Fellowship Program in South Africa and Namibia, $89,000 for wood product exports to South Africa, and $81,000 for U.S. exporters to exhibit products at the Food and Hotel Africa 96 conference in South Africa.[27]

Food Assistance

U.S. food assistance under titles I, II, and III of the Food for Peace Program (Public Law 480)[28] to Sub-Saharan Africa countries totaled $555.4 million in FY 1995 and was 13 percent lower than in FY 1994, owing mainly to lower budget levels. The Sub-Saharan Africa region accounted for 44 percent of total U.S. food assistance under these programs in FY 1995. The primary recipient countries in the region that year included Rwanda (23 percent of the total), Ethiopia (17 percent), Angola (10 percent), and Liberia (9 percent). Principal commodities included grains, flours and meals, pulses, and vegetable oils. Food donations under title II of Public Law 480 accounted for 86 percent of total food assistance in FY 1995 to the region, followed by title III (9 percent) and title I (5 percent). Angola, Côte d'Ivoire, and Congo were the only recipients under title I; Rwanda, Ethiopia, Liberia, and Angola were the primary recipients under title II; and Ethiopia and Mozambique were the only recipients under title III. No assistance was provided under section 416(b) of the Agricultural Act of 1949 in FY 1995.

Agricultural Legislation

The major domestic agricultural legislation passed during 1995-96 that affects U.S.-Sub-Saharan Africa trade is the Federal Agricultural Improvement and Reform (FAIR) Act of 1996.[29] The FAIR Act, which succeeds the Food, Agriculture, Conservation and Trade (FACT) Act of 1990,[30] generally reduces domestic production subsidies and reforms trade and food aid programs. The trade provisions of the FAIR Act generally shifts emphasis from matching export subsidies of competitors in commodity export markets to targeting higher-value, agricultural exports driven by market considerations. The food aid provisions generally were amended to provide greater flexibility and improve the administration of food aid programs.[31]

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[25] USITC staff telephone conversation with an official of the U.S. Department of Agriculture, July 23, 1996.

[26] As of Apr. 1996. As with the FMD and MPP, FY 1995 is still open.

[27] USITC staff telephone conversation with an official of the U.S. Department of Agriculture, July 23, 1996.

[28] The Agricultural Trade Development and Assistance Act of 1954, Public Law 480, 68 Stat. 454. Title I, administered by USDA, provides for sales of U.S. agricultural commodities using long-term concessional credit. Title II is the primary U.S. foreign food donation component and can be used for development projects or emergency feeding. Title III provides grants for development activities on a government-to-government basis that normally include policy reform conditions and that frequently generate local currencies for development projects. Titles II and III are administered by USAID.

[29] Public Law 104-127.

[30] Public Law 101-624.

[31] See, for example, Edwin Young and Dennis A. Shields, "Provisions of the 1996 Farm Bill--the Federal Agricultural Improvement and Reform (FAIR) Act," *Agricultural Outlook*, Economic Research Service, U.S. Department of Agriculture, Apr. 1996.

Concerns regarding changes in U.S. and other developed-country agricultural production and export policies center on the expectation that world food prices will rise and thus reduce the ability of Sub-Saharan Africa to import food. According to USDA, however, the new food trade and aid policy maintains the U.S. commitment to remain a major food aid donor and it improves the ability of the United States to adjust food aid to respond to individual recipients' needs and conditions.[32]

Other Programs

TDA activity in Sub-Saharan Africa in 1995 with respect to agriculture involved a feasibility study for an integrated sugar production facility in Eritrea, funded at $295,000.[33] Agriculture-related OPIC assistance in the region during FY 1995 included insurance coverage for a $47.7 million sugar refinery project in Ethiopia and a $12.5 million soft drink bottling project in Ghana. This assistance represented about 35 percent of OPIC's assistance for Sub-Saharan Africa in 1995.[34]

Policy Developments in Sub-Saharan Africa

Policy developments in major U.S. agricultural trade partners in Sub-Saharan Africa are discussed below.

South Africa

In the past, South Africa's agricultural policy emphasized self-sufficiency, largely because of economic sanctions. Policy measures included price incentives and input subsidies to producers, the use of state trading enterprises to control the marketing of farm production, and high import tariffs and other barriers. The estimated cost of these measures to South African consumers was about $550 million annually.[35] One major policy change in South Africa has been the aforementioned reductions in tariffs and quotas. Currently, the South African Government is in the process of liberalizing its agricultural marketing system. The Marketing of Agricultural Products Bill is under consideration by the Parliamentary Portfolio Committees on Agriculture. The contents and outcome of the bill are as yet uncertain. There is concern on the part of trading partners that the new bill would establish new marketing organizations which could limit market access in the future.[36]

Land reform in certain countries in Sub-Saharan Africa likely will affect future foreign investment opportunities. In South Africa, the recent change in government has led to a commitment to land reform on two fronts--restitution for past forced removals and redistribution to address hunger and inequality.[37] The effect of land reform on South African agricultural production, trade, and investment is yet unclear. For

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[32] U.S. Department of State cable, "Farm Bill: Implications for Trade and Aid," message reference No. 129256, prepared by U.S. Department of State, Washington, D.C., June 21, 1996.

[33] U.S. Trade and Development Agency, *TDA projects*, Apr. 1996.

[34] Overseas Private Investment Corporation *1995 Annual Report* (Washington, DC: OPIC, 1995), pp. 22-26.

[35] U.S. Department of State cable, "Agricultural Situation," message reference No. SF5041, prepared by U.S. Embassy, Pretoria, Sept. 30, 1995, pp. 12-15.

[36] WTO, Working Party on State Trading Enterprises, "Replies to Questions from Canada on the Article XVII Notification of South Africa," document G/STR/Q1/ZAF/1, July 8, 1996.

[37] U.S. Department of State cable, "Agricultural Situation," message reference No. SF5041, prepared by U.S. Embassy, Pretoria, Sept. 30, 1995.

example, land reform in neighboring Zimbabwe has resulted in declining productivity and has raised concerns regarding the erosion of the commercial agricultural sector.[38]

Nigeria

Nigeria's lifting of import prohibitions on many items, as mentioned above, provided the most opportunity for U.S. exports of rice. U.S. rice enjoys a reputation for high quality in the Nigerian market compared with rice from Asian competitors.[39] In addition, a domestic shortage of fertilizer caused, in large part, by a suspension of imports in 1995 has had a negative impact on Nigerian agricultural production.[40] Although this may present a short-term opportunity for U.S. agricultural exports, foreign exchange constraints may limit the ability of Nigeria to import.

Ghana

Ghana continued its agricultural policy of increasing the role of the private sector. The Government largely privatized the Ghana Food and Distribution Corporation, which controlled the marketing of cereals and staple foods.[41] The Government is also considering the privatization of COCOBOD, the state marketing agency for cocoa.[42] With respect to trade, COCOBOD officials are concerned about a recent EU proposal that allows certain manufactured chocolate products to contain up to 5 percent vegetable fat, thus displacing Ghanaian exports of cocoa butter.[43] The officials are also concerned that the United States may adopt a similar standard in the future, further limiting the global market for Ghanaian cocoa butter.

U.S. exports to Ghana under GSM-102 are affected by foreign exchange restrictions. Ghanaian banks are subject to foreign exchange ceilings and, as a result, Ghanaian banks generally require 100-percent collateral at high rates of interest (30-35 percent) for letters of credit to finance GSM-102 transactions. The main commodities affected by these restrictions are rice, wheat, and corn, although rice was not included in the GSM-102 program in FYs 1995 and 1996.[44]

Côte d'Ivoire

Côte d'Ivoire has begun an economic liberalization program mainly in response to a prolonged recession linked to depressed world prices for cocoa and coffee[45] and the 50-percent devaluation of the CFA franc on

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[38] "Mugabe Assures Investors Zimbabwe's Land Policy," Comtex Scientific Corp., NewsEDGE/LAN, June 4, 1996.

[39] U.S. Department of State cable, "Grain and Feed," message reference NI6007, prepared by U.S. Embassy, Lagos, April 16, 1996, p. 6.

[40] Ibid, p. 1.

[41] U.S. Department of State cable, "Agricultural Situation," message reference No. GH5006, prepared by U.S. Embassy, Lagos, Sept 30, 1995.

[42] U.S. Department of State cable, "Producer Price Changes for Cocoa in Ghana," message reference No. 006508, prepared by U.S. Embassy, Lagos, July 9, 1996. Vegetable fat is a low-cost substitute for cocoa butter in the production of chocolate.

[43] Ibid.

[44] U.S. Department of State cable, "Grain and Feed," message reference No. GH5005, prepared by U.S. Embassy, Lagos, Sept. 30, 1995, pp. 1-2.

[45] These commodities account for in excess of half the country's export revenues.

January 12, 1994.[46] The general aim of reforms in the agricultural sector is to deregulate and privatize the distribution of controlled agricultural commodities to hasten the development of the private sector and to lower costs borne by the government.[47] Such reforms have been targeted to sectors such as rice, cotton, palm oil, and sugar, which are being privatized.

The dissolution in May 1995 of the *Caisse de Perequation*, the state trading company that handled rice imports, has reportedly resulted in increased U.S. rice exports.[48] Measures have been taken to eliminate a government monopoly on wheat and flour imports,[49] and domestic production subsidies were eliminated in January 1996.[50] A new investment code, established in 1995, liberalized controls on foreign investment, and the Government opened the Centre for the Promotion of Investment in Côte d'Ivoire on March 8, 1995. In response to consultations with the World Bank regarding a $150 million structural adjustment program, the state trading company that controls the marketing of cocoa and coffee established an electronic auction system for exporters and lowered freight rates to the United States,[51] resulting in increased exports.[52]

Kenya

Recent developments affecting Kenya's agricultural trade include the expansion of production capacity for tea and coffee, two of the country's major export items. The Kenya Tea Development Authority, the agency that controls the marketing of small-holder tea, is in the process of building 7 new tea factories to augment the 44 existing factories and may build even more factories.[53] The Coffee Board of Kenya, a state trading agency, commissioned a new coffee mill in March 1995 to augment the output from three existing mills.[54]

A development potentially affecting U.S. corn exports was Kenya's entry into the export market to the southern Africa region. As a result of recent favorable domestic growing conditions, the liberalization of grain marketing, relatively high grower support prices, and a prolonged drought in southern Africa, the National Cereals and Produce Board (NCPB) contracted to export surplus corn supplies to the region.[55] This situation occurred in the face of an announced policy by the Kenya Government to reduce the role of the NCPB in the grain market. Government officials stated that this would be an isolated action to reduce grain stockpiles.[56]

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[46] World Trade Organization, *Trade Policy Review of Côte d'Ivoire*, June 27, 1995, found at http://www.unicc.org/wto/Trade_Reviews/6_9_0_wpf.html.

[47] Ibid.

[48] U.S. Department of State cable, "U.S.-Africa Trade Flows," message reference No. 009442, prepared by U.S. Embassy, Abidjan, Aug. 6, 1996.

[49] U.S. Department of State cable, "Wheat and Flour Imports--Liberalized, But Not," message reference No. IV5013, prepared by U.S. Embassy, Abidjan, May 5, 1995.

[50] U.S. Department of State cable, "Agricultural Situation," message reference No. IV5034, prepared by U.S. Embassy, Abidjan, Sept. 21, 1995, p. 24.

[51] Ibid., p. 6.

[52] U.S. Department of State cable, "U.S.-Africa Trade Flows," message reference No. 009442, prepared by U.S. Embassy, Abidjan, Aug. 6, 1996.

[53] U.S. Department of State cable, "Tea," message reference No. KE5010, prepared by U.S. Embassy, Nairobi, Dec. 18, 1995.

[54] U.S. Department of State cable, "Coffee," message reference No. KE5009, prepared by U.S. Embassy, Nairobi, Nov. 15, 1995, p. 6.

[55] U.S. Department of State cable, "Grain and Feed," message reference No. KE5008, prepared by U.S. Embassy, Nairobi, Nov. 1, 1995.

[56] Ibid., p. 5.

Multilateral Lending

Multilateral lending that could affect U.S. trade and investment in the Sub-Saharan Africa agricultural sector includes project financing and other credit extended by the World Bank Group and the African Development Bank (AfDB). The World Bank, mainly through the International Development Association (IDA), provided $375.1 million in lending commitments to the agriculture sector in Sub-Saharan Africa in FY 1995.[57,58] Projects were funded in Central African Republic, Chad, Côte d'Ivoire, Ethiopia, Ghana, Madagascar, Mali, Senegal, and Zambia.

Agricultural financing provided to Sub-Saharan Africa through various bodies of the AfDB totaled $112.6 million in 1995 and accounted for approximately 24 percent of AfDB disbursements to the region (see chapter 3). Leading recipients in Sub-Saharan Africa include Côte d'Ivoire, Ethiopia, Gabon, Mozambique, Nigeria, Sudan, and Tanzania. ■

Forest Products[59]

Overview

Trade in forest products with Sub-Saharan Africa experienced substantial growth in 1995. U.S. exports of forest products totaled $235.9 million, an increase of 39 percent over the 1994 level, while U.S. imports of forest products were valued at $100.8 million, a 35 percent increase. The United States ran a trade surplus in forest products of $135.1 million in 1995.

More than 90 percent of U.S. exports of forest products in 1995 were concentrated to a few countries in the region, notably South Africa, Côte d'Ivoire, Nigeria, Zambia, and Cameroon as shown below (million dollars):

South Africa	147.9
Côte d'Ivoire	23.0
Nigeria	19.4
Zambia	15.4
Cameroon	6.8
All other	23.3
Total	235.9

Coated paper and kraft paper products were the most important U.S. exports to Sub-Saharan Africa, totaling over $50 million in 1995. South Africa was by far the main market for these products, accounting for 96 percent of the total. Another important U.S. export to the region is printed books, periodicals, paperbacks,

[57] July 1-June 30.

[58] The World Bank, *The World Bank Annual Report 1995* (Washington, DC: The World Bank, 1995), p. 59.

[59] The forest products sector includes wood and articles of wood; wood charcoal; cork and articles of cork; manufactures of straw, of esparto or of other plaiting materials; basketware and wickerwork; pulp of wood or of other fibrous cellulosic material; waste and scrap of paper or paperboard; and, paper and paperboard and articles thereof.

and other similar printed matter items. Although South Africa is the largest market for these items, an increasing amount is being exported to other Sub-Saharan countries such as Zambia and Botswana. Exports of printed matter to all of Sub-Saharan Africa were valued at over $46 million in 1995, up 35 percent from 1994, and are expected to rise further due to the increasing use of the English language in business and culture.

U.S. imports of forest products from Sub-Saharan Africa also tend to be concentrated among a few countries, with the top five countries of South Africa, Ghana, Swaziland, Côte d'Ivoire, and Cameroon, accounting for nearly 85 percent of imports from the region as shown below (million dollars):

South Africa	63.1
Ghana	6.7
Swaziland	6.5
Côte d'Ivoire	4.8
Cameroon	4.3
All other	15.4
Total	100.8

U.S. imports of forest products, especially chemical pulps from South Africa, are likely to increase, albeit slowly, resulting from increased liberalization of U.S. tariffs and nontariff barriers. A South African company's acquisition of a large U.S. paper maker and converter in 1994 is expected to increase South Africa's shipments of pulp to the United States as the recently acquired firm adjusts its purchasing patterns of pulp products.[60]

URA Developments Affecting Sector Trade and Investment

Dutiable U.S. imports from Sub-Saharan Africa fell from $3.0 million in 1994 to $2.0 million in 1995, or by 33 percent, as tariffs in the United States have been reduced under the URA. The U.S. ATWT on forest product imports from Sub-Saharan Africa into the United States similarly fell from 5.7 percent AVE in 1994 to 4.8 percent AVE in 1995. This decline was due to increased imports of pulp products from South Africa, which enter duty-free.

The main dutiable item imported by the United States in 1995 consisted of wooden doors and their frames and thresholds from South Africa, valued at $2.4 million at 7.0 percent AVE, and wicker luggage and handbags, valued at $1.2 million at 5.3 percent AVE from Madagascar. U.S. duties on wooden doors are slated to be reduced by 36 percent under the URA, but duties on wicker luggage and handbags are not slated for further reductions.

Duties on paper and paperboard products in South Africa average 7.5 percent AVE, which is below the 11.7-percent AVE duty for the major paper and paperboard trading countries.[61] The effective rate of protection afforded the entire forest products industry declined on October 1, 1995, when the South African Government

[60] U.S. Department of Agriculture, "South Africa's Wood, An Overview," Agworld Attache Reports, Jan. 17, 1996.

[61] Mick Collins, "Paper Industry, Falling Off a Log," *Financial Mail*, Nov. 8, 1995, found at http://www.atd.co.za/fm/issues/110895/LA.1.html.

eliminated its imposition of import surcharges for the forest products sector.[62] However, the South African Government still requires an import permit, which involves applying to the Director of Imports and Exports to receive the necessary permission, for the pulp, paper, and wood sectors.[63]

Economic and Trade Policies Affecting U.S.-Sub-Saharan Africa Trade and Investment

U.S. Policies

U.S. imports of forest products from Sub-Saharan Africa eligible for GSP treatment totaled $13.4 million in 1995, or 13.3 percent of total forest product imports from the region. This represents an increase of 17.6 percent from 1994 levels. GSP imports from South Africa, Kenya, Madagascar, Ghana, and the Côte d'Ivoire account for 94 percent of the total as shown below (million dollars):

South Africa	8.0
Kenya	1.9
Madagascar	1.8
Ghana	0.6
Côte d'Ivoire	0.3
All other	0.8
Total	13.4

In regard to U.S. exports in this sector, the USDA plans to provide $89,000 in trade credits for wood product exports to South Africa under the EMP in FY 1996 as noted previously in the section on agricultural products.

Policy Developments in Sub-Saharan Africa

A number of policy developments occurred during 1995 in Sub-Saharan Africa that may affect future U.S. exports of forest products to the region. One of the most notable developments is South Africa's housing initiative. Housing Minister Sankie Mthembi-Nkondo pledged to continue an initiative to construct 1 million new housing units over the next five years.[64] The South African Government is attempting to establish a mortgage market to finance such construction and has authorized the use of $800 million to develop the housing sector. Housing construction anywhere close to this volume should lead to an increase in demand for U.S. wood products and other construction materials.[65]

During September 1995, the Government of the Côte d'Ivoire instituted a ban on the exportation of logs, planks, and scantlings with the aim of reducing over-exploitation of the forest resources and aiding the development of local, value-added wood processing industries. Approximately 240,000 cubic meters of logs

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[62] USTR, *1996 National Trade Estimate Report on Foreign Trade Barriers* (Washington, DC: GPO, 1996), pp. 305-307.
[63] U.S. Department of Commerce, International Trade Administration (ITA), "1996 Country Commercial Guide for South Africa," National Trade Data Bank, 1995.
[64] U.S. Department of Commerce, ITA, "Housing Market Trends," Market Research Report, Jan. 1996.
[65] Ibid.

were exported to the world before this ban took effect.[66] The United States is a very small importer of logs from Côte d'Ivoire. ■

Chemicals and Related Products[67]

Overview

In 1995, the United States remained a major world producer and exporter of chemicals and improved its positive balance of trade in terms of chemicals and related products with Sub-Saharan Africa. U.S. exports of chemicals and related products totaled $705.7 million to this region, an increase of 45 percent over 1994, while U.S. imports of these products were valued at $226.8 million, an increase of 48 percent. The U.S. trade balance in chemicals and related products increased from $332.2 million in 1994 to $478.9 million in 1995. The Sub-Saharan African nations are, however, minor U.S. trading partners in terms of these products, accounting for less than 1 percent of total U.S. imports and total U.S. exports of chemicals and related products.

In 1995, the primary markets for U.S. chemicals and related products were South Africa, accounting for $440.2 million, or 62 percent, of total U.S. sector exports to Sub-Saharan Africa, and Nigeria, which accounted for $83.4 million, or 12 percent, as shown below (million dollars):

South Africa	440.2
Nigeria	83.4
Côte d'Ivoire	32.6
Ghana	27.3
Ethiopia	27.0
All other	95.2
Total	705.7

U.S. exports to South Africa and Nigeria consisted primarily of intermediate chemicals, which both nations used as feedstocks for their production of specialty chemicals. Both nations have increased revenue from exports of various raw materials, such as coal and crude petroleum, allowing them to purchase more goods, including chemicals and related products, on the world market.

[66] U.S. Department of Agriculture, "Côte d'Ivoire (Ivory Coast), Forest Products, Ban on Log Exports," Voluntary Report, Sept. 1995.

[67] Chemicals and related products, for the purpose of this sectoral write-up are grouped into six categories: (1) primary aromatic chemicals and olefins (major primary olefins, other olefins, and primary aromatics); (2) agricultural chemicals (fertilizers and pesticides); (3) miscellaneous finished chemical products (paints, inks, and related items, synthetic organic pigments, synthetic dyes and couplers, synthetic tanning agents, synthetic tanning and dyeing materials, photographic chemicals, adhesives and glues, perfumes, cosmetics and toiletries, soaps, detergents, surface-active agents, explosives, and propellant powders); (4) pharmaceuticals (antibiotics and other medicinal chemicals); (5) rubber, plastics, and products thereof (polyethylene resins, polypropylene resins, PVC resins, styrene polymers, saturated polyester resins, other plastics in primary forms, SBR rubber, other synthetic rubber, pneumatic tires and tubes, other tires, plastic containers and closures, hoses, belting, and plastic pipe, miscellaneous rubber or plastics products, and natural rubber); and (6) other miscellaneous chemicals (benzenoid commodity chemicals, benzenoid specialty chemicals, miscellaneous organic chemicals, selected inorganic chemicals and elements, inorganic acids, salts, and other inorganic chemicals, chlor-alkali chemicals, industrial gases, essential oils, and other flavoring materials, miscellaneous chemicals and specialties, and gelatin).

The primary sources of U.S. imports of chemicals and related products from Sub-Saharan Africa in 1995 were South Africa, which accounted for $117.1 million, or 52 percent, of total U.S. sector imports from Sub-Saharan Africa, and Nigeria, which account for $68.8 million, or 30 percent, as shown below (million dollars):

South Africa	117.1
Nigeria	68.8
Côte d'Ivoire	13.1
Cameroon	7.8
Angola	7.4
All other	12.6
Total	226.8

U.S. imports of chemicals and related products from Sub-Saharan Africa were primarily small shipments of various specialty chemicals, polyester fibers, and plastics products. During 1994-95, U.S. imports of chemicals and related products from South Africa rose by 26 percent while imports from Nigeria rose by 149 percent. The increase in U.S. imports from South Africa is attributed to a gradual reintegration of the nation into the world economy and to South Africa's regained GSP status in May 1994. At the same time, U.S. imports from Nigeria rose significantly as a result of increased economic stability in the nation and an increase in the availability of hard currency derived from increased production and exportation of crude petroleum.

URA Developments Affecting Sector Trade and Investment

Tariff Changes

The dutiable value of U.S. imports of chemicals and related products from Sub-Saharan Africa fell from $51.2 million in 1994 to $22.0 million in 1995 largely due to increased GSP imports from South Africa. The ATWT on U.S. imports of chemicals and related products from the region increased from 4.5 percent AVE in 1994 to 6.5 percent AVE in 1995. This change is attributed to a decrease in GSP-eligible imports from other nations, primarily Côte d'Ivoire.

Economic and Trade Policies Affecting U.S.-Sub-Saharan Africa Trade and Investment

South Africa attempted to simplify its tariff system by consolidating similar products, which resulted in higher tariffs on some products such as soda ash.[68] The tariff on soda ash rose from zero in 1991 to 10 percent in 1995. Under the provisions of the URA, South Africa agreed to bind the tariff on soda ash at 10 percent for 5 years and to then reduce the duty to 5.5 percent in 5 equal stages over 5 years.[69]

[68] USTR, "South Africa," *1996 National Trade Estimate Report*, pp. 305-311 and U.S. Senate, Committee on Foreign Relations, Committee on Finance, and U.S. House of Representatives, Committee on International Relations, Committee on Ways and Means, "South Africa," *Country Reports on Economic and Trade Practices*, prepared by the Department of State (Washington, DC: GPO, 1996), pp. 25-32.

[69] ANSAC, brief submitted to the USITC, Aug. 1, 1996, pp. 1-2.

Other URA Developments

Certain sectors within the category of chemicals and related products are still affected by the zero-for-zero initiative, the Chemical Tariff Harmonization Agreement (CTHA), and the (URA) Agreement on Trade-Related Aspects of Intellectual Property Rights (TRIPS).[70] While these URA provisions are not expected to have a significant effect on this sector, TRIPS is expected to result in increased technology transfer in both the public and private sectors of Sub-Saharan Africa Economic and Trade Policies Affecting U.S.-Sub-Saharan Africa.

Trade and Investment

U.S. Policies

U.S. imports of chemicals and related products eligible for GSP increased from $30.1 million in 1994 to $60.5 million in 1995, primarily as a result of South Africa regaining GSP eligibility in May 1994. South Africa accounted for 95 percent of the total value of GSP imports of chemicals and related products from Sub-Saharan Africa in 1995, an increase of 112 percent over 1994.

Policy Developments in Sub-Saharan Africa

South Africa's chemical industry is dominated by four large companies producing a wide-range of chemicals. In an effort to globalize the South African chemicals industry, these companies began forming joint ventures in 1993 and 1994 to gain much-needed technology and to increase production and export of their chemicals.[71] As a result, industries producing petrochemicals and intermediate chemicals showed economic growth in 1995, expanding by 10.3 percent.[72] It is expected that South Africa's need for technology will result in an increase in investment in South Africa by U.S. companies.

Nigeria experienced an economic recovery as labor strikes in the petroleum industry, the nation's primary source of hard currency, eased and crude petroleum exports to the world market increased. Also, Nigeria has made changes in its investment laws, including allowing companies to source foreign exchange from wherever they choose and no longer limiting the amount of foreign ownership of a company.[73] As a result, U.S. companies are more likely to consider investing in the nation's growing chemical industries. ■

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[70] See chapter 5 "Chemicals and Related Products" in USITC, *U.S.-Africa Trade Flows and Effects of the Uruguay Round*, USITC publication 2938.

[71] U.S. Africa Chamber of Commerce, submission to the USITC, July 13, 1995, p. 9.

[72] U.S. Department of Commerce, ITA "1996 Country Commercial Guide for South Africa."

[73] U.S. Department of Commerce, ITA, "1996 Country Commercial Guide for Nigeria," National Trade Data Bank, 1995.

Energy-Related Products[74]

Overview

The United States has historically maintained a negative balance of trade in energy-related products with Sub-Saharan Africa primarily because of imports of crude petroleum. In 1995, U.S. exports of energy-related products totaled $149.3 million, an increase of 31 percent over 1994 levels, while U.S. imports were valued at $9,054.7 million, an increase of 8 percent. The trade deficit in energy-related products further deteriorated from $8.3 billion in 1994 to $8.9 billion in 1995.

U.S. exports of energy-related products to Sub-Saharan Africa accounted for about 3 percent of total U.S. exports to the region in 1995. South Africa, the major regional market for U.S. sector exports, accounted for $107.2 million, or 72 percent, in 1995, and Nigeria accounted for $19.4 million, or 13 percent, as shown below (million dollars):

South Africa	107.2
Nigeria	19.4
Ghana	7.9
Cameroon	3.0
Côte d'Ivoire	2.8
All other	9.0
Total	149.3

U.S. exports of energy-related products to South Africa consist primarily of refined petroleum products and coal used to generate electricity and supplement shortfalls in South African production. U.S. exports to Nigeria consist primarily of refined petroleum products and various coal chemicals used as chemical feedstocks.

Energy-related products comprised the largest sector of U.S. imports from Sub-Saharan Africa in 1995. The major sources of these imports were Nigeria, which accounted for $4.8 billion, or 53 percent; Angola, which accounted for $2.3 billion, or 25 percent; and Gabon, which accounted for $1.5 billion, or 17 percent. Nigeria and Gabon are both members of the Organization of Petroleum Exporting Countries. U.S. sector imports by source are shown below (million dollars):

Nigeria	4,783.7
Angola	2,287.2
Gabon	1,540.0
Congo	173.9
Zaire	132.4
All other	137.6
Total	9,054.7

[74] Energy-related products, for the purpose of this sectoral write-up, include crude petroleum, refined petroleum products, natural gas, coal, coke, and related chemical products, and nuclear materials.

In 1995, crude petroleum accounted for about 94 percent of the total U.S. imports in this sector, refined petroleum products accounted for 3 percent, and coal chemicals accounted for 3 percent. The increase in the value of U.S. imports of energy-related products during 1994-95 was primarily the result of increased prices for crude petroleum on the world market. In terms of quantity, in 1995, U.S. imports of crude petroleum from both Nigeria and Angola remained at or near the 1994 levels.

URA Developments Affecting Sector Trade and Investment

The dutiable value of energy-related products from Sub-Saharan Africa increased from $7,374.7 million in 1994 to $7,866.6 million in 1995. The ATWT on U.S. imports of energy-related products from Sub-Saharan Africa decreased slightly from 0.65 percent AVE in 1994 to 0.62 percent AVE in 1995 due to a change in the mix of refined petroleum products imported.

Economic and Trade Policies Affecting U.S.-Sub-Saharan Africa Trade and Investment

U.S. Policies

Most of the products covered in this sector are not eligible for GSP. During 1991-94, there were no GSP imports of energy-related products; however, in 1995, a small shipment of specialty lubricating oils valued at $1,296 entered the U.S. market under the provisions of the GSP from Cameroon.

Policy Developments in Sub-Saharan Africa

The gradual adoption of market economies by Angola, Nigeria, and South Africa is expected to lead to new investment opportunities for multinational energy companies in the region.[75] Since most of the countries in Sub-Saharan Africa are dependent upon imported crude petroleum and are looking to ensure their future energy security, investments in the energy sector are needed to assist with the region's economic growth.[76] The region is in need of exploration and development technology for crude petroleum, natural gas, and coal as well as upgrades in transportation infrastructure, such as ports and pipelines. Investment in the energy-related products sector by private sector, multinational energy companies is expected to exceed $10 billion in the region within the decade.[77]

Angola's Ministry of Petroleum recently opened the nation's offshore crude petroleum and natural gas sectors to foreign investment, which led to increased production and exports in 1995.[78] Angola currently plans to open additional energy sectors to foreign investment, including both downstream petroleum refining projects and the necessary infrastructure to move additional production.[79]

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[75] "Petroleum Key to African Prosperity," *Oil and Gas Journal*, June 24, 1996, p. 27.
[76] Ibid.
[77] International Energy Agency (IEA), *Energy Policies of South Africa, 1996 Survey*, (Paris: OECD/IEA, 1996).
[78] "Petroleum Key to African Prosperity," *Oil and Gas Journal*, June 24, 1996, p. 27.
[79] "Angola to Seek Foreign Partners for Downstream Operations," *Oil and Gas Journal*, June 24, 1996, p. 23.

As noted earlier, Nigeria has made a number of changes in its investment laws to promote foreign investment. These changes, coupled with Nigeria's National Petroleum Corp. having recently opened the nation's refining industry to foreign investment, are expected to lead to increased trade during the next few years.[80]

South Africa has abundant reserves of coal and is dependent upon coal to satisfy domestic demand for electricity; however, 65 percent of the South African population has no access to electricity.[81] As a result, South Africa is beginning to open its energy sectors to foreign investment in an effort to obtain much needed technology and infrastructure. Foreign investors view South Africa's energy industry as more politically stable than other energy-rich areas of the world in need of foreign investment.[82] ■

Textiles and Apparel and Footwear [83]

Overview

The U.S. trade deficit with Sub-Saharan Africa in textiles and apparel and footwear narrowed slightly in 1995, by $9.9 million from the previous year, to $247.5 million. Since U.S. footwear trade with the region is negligible, the remainder of this sector discussion will deal only with textiles and apparel. The region accounted for about 1 percent of total U.S. textile and apparel trade in 1995.

U.S. textile and apparel exports to Sub-Saharan Africa totaled $171.0 million in 1995, an increase of 20 percent over the 1994 level,[84] while U.S. textile and apparel imports from the region were $425.8 million in 1995, up 5 percent from the previous year.[85] However, this was a sharp contrast to the 34-percent average annual growth rate for textile and apparel imports from the region during 1991-94. The import slowdown in 1995 followed the imposition of a quota on U.S. imports of men's and boys' cotton shirts from Kenya.

Leading U.S. textile and apparel export markets in Sub-Saharan Africa in 1995 are shown below (million dollars):

South Africa	42.5
Nigeria	15.8
Zaire	14.5
Côte d'Ivoire	10.6
Niger	10.5
All other	77.1
Total	171.0

[80] "Nigeria-Economics: Private Refineries Welcome," *Petroleum Economist,* Feb. 1996, p. 32.

[81] International Energy Agency, *Energy Policies of South Africa, 1996 Survey.*

[82] Ibid.

[83] This sector includes textile fibers other than cotton and wool, which are included in agricultural products, yarns, fabrics, made-up textile goods, apparel of textile and non-textile materials (leather, fur, rubber, and plastics), and rubber and nonrubber footwear.

[84] Total U.S. exports of textiles and apparel were up 16 percent in 1995 and amounted to $15.1 billion.

[85] Total U.S. imports of textiles and apparel were up 8 percent in 1995 and amounted to $50.2 billion.

Most of the $29 million increase in U.S. sector exports to Sub-Saharan Africa in 1995 was accounted for by a $24.4 million, or 43-percent, increase in exports of used clothing and other used textile articles. This category is the fifth largest of all U.S. exports to the region and accounted for 47 percent of U.S. textile and apparel exports, reflecting the continued poverty of most nations in the region. U.S. sector exports to Zaire, Côte d'Ivoire, and Niger rose by 60, 89, and 110 percent, respectively, in 1995 and consisted largely of used clothing. U.S. textile and apparel exports to South Africa increased by 1 percent and those to Nigeria fell by 3 percent in 1995.

The leading sources of U.S. textile and apparel imports from Sub-Saharan Africa in 1995 are shown below (million dollars):

Mauritius	190.6
South Africa	77.5
Lesotho	61.7
Kenya	35.9
Zimbabwe	14.2
All other	45.9
Total	425.8

Sector imports from Mauritius, South Africa, and Zimbabwe rose by a total of $22.5 million in 1995, which more than offset the $2.0 million decline in imports from Lesotho and Kenya. Imports from all other countries in Sub-Saharan Africa rose by $16 million, but from much smaller levels.

URA Developments Affecting Sector Trade and Investment

Tariff Changes

The U.S. ATWT for textile and apparel imports from Sub-Saharan Africa fell slightly from 18.2 percent AVE in 1994 to 17.8 percent AVE in 1995. The United States is reducing textile and apparel tariffs under the URA over a 10-year period by a total of 2 percentage points to a trade-weighted average of 15.2 percent AVE.

No changes in tariffs of Sub-Saharan Africa countries were identified that affected U.S. exports in 1995. However, Zimbabwe implemented a new tariff regime on July 1, 1996. Most of Zimbabwe's tariff rates now range from 5 to 50 percent; however, higher rates are applied to certain goods, including textiles and apparel, to protect these industries from import competition.[86] In June 1996, Tanzania's Finance Minister released the Government's 1996-97 budget which included the imposition of taxes on certain imported goods, including woven fabrics and apparel.[87] The tax on imports of fabrics will be 271 Tanzanian shillings ($.44) per square meter, or 30 percent, whichever is higher. The taxes on apparel will range from 400 to 2,000 shillings ($.65 to $3.23) per garment.

[86] "Zimbabwe Unveils New Tariffs Regime," Comtex Scientific Corp., NewsEDGE/LAN, June 28, 1996.
[87] "Government to Protect Local Industries," Comtex Scientific Corp., NewsEDGE/LAN, June 21, 1996.

Other URA Developments

The structure of U.S. textile and apparel trade will become less restrictive as a result of the implementation of the UR Agreement on Textiles and Clothing[88] (ATC), which entered into force on January 1, 1995. The ATC replaced the Multifiber Arrangement (MFA), which had governed world trade in these goods since 1974 under the General Agreement on Tariffs and Trade (GATT). The MFA permitted the use of quotas by importing countries in exchange for guaranteed market access for exporting countries. Under the ATC, textiles and apparel will be gradually "integrated" into the GATT regime and brought under GATT discipline and subject to the same rules as goods of other sectors.[89] As WTO members integrate their textile and apparel trade into the GATT regime, they must eliminate quotas on imports of integrated sector goods and they cannot establish new quotas on the integrated items other than as provided under normal GATT rules. Under the ATC, all WTO member countries are obligated to achieve improved access to their textile and apparel markets, ensure fair and equitable trading conditions, and avoid discrimination against sector imports when implementing general trade policy measures. Representatives of the Congressional Africa Trade Caucus have estimated that when quotas on textiles and apparel are completely eliminated in 2005 under the ATC, the global trade in these goods will produce net revenue of $32 billion for African countries.[90]

The ATC integration process is to occur over a 10-year transition period in three stages. The first stage began on January 1, 1995, when WTO members were obligated to integrate at least 16 percent of their sector trade and to increase annual growth rates for quotas still in place by 16 percent.[91] The second stage begins in 1998, when at least another 17 percent of the trade is to be integrated, followed by at least another 18 percent in 2002. The rest of the trade is to be integrated at the end of the 10-year period. None of the products integrated by the United States in the first stage were under quota at the time.

The United States currently has quotas on imports from two countries in Sub-Saharan Africa--Mauritius and Kenya. During 1995, two product categories were covered by quotas in the agreement with Kenya. Of these categories, the quota covering men's and boys' woven cotton and manmade fiber shirts was 98 percent filled and the one covering cotton pillowcases was 27 percent filled.[92] The agreement with Mauritius is more comprehensive, covering some 13 product categories in 1995. Of these categories, the quotas for cotton knit shirts and blouses and men's and boys' woven cotton and manmade fiber shirts were totally filled. The quota for cotton trousers, slacks, and shorts was 83 percent filled. None of the other quotas were more than 55 percent filled and seven had no imports charged to them.

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[88] Agreement on Textiles and Clothing, Final Act Embodying the Results of the Uruguay Round of Multilateral Trade Negotiations.

[89] President, "Memorandum of December 15, 1993--Trade Agreements Resulting From the Uruguay Round of Multilateral Trade Negotiations," 58 F.R. 67272, Dec. 20, 1993.

[90] "U.S.-Africa: Campaign for African Markets Gathers Momentum," Comtex Scientific Corp., NewsEDGE/LAN, June 17, 1996.

[91] The acceleration of quota growth rates is based on the growth rates specified in the bilateral agreements that were in place on December 31, 1994. Quota growth rates range from less than 3 percent for the major Asian suppliers to 7 percent for smaller suppliers. In the second and third stages of the ATC integration process, quota growth for major suppliers is to be increased by another 25 and 27 percent, respectively. For small suppliers, including Mauritius and Kenya, quota growth was advanced one stage; that is, growth rates were increased by 25 percent in the first stage.

[92] The shirts accounted for 46 percent of total sector imports from Kenya in 1994, 49 percent in 1995, and 17 percent during the first 5 months of 1996. Cotton pillowcases accounted for 10 percent of the total in 1994, 3 percent in 1995, and 2 percent in the 1996 period.

Economic and Trade Policies Affecting U.S.-Sub-Saharan Africa Trade and Investment

U.S. Policies

Because most textiles and apparel are not eligible for GSP, imports entering under GSP account for less than 1 percent of total U.S. textile and apparel imports from Sub-Saharan Africa. However, sector imports designated as eligible for GSP during 1995 amounted to $3.2 million and were 54 percent above the 1994 level.

Several members of Congress have expressed interest in establishing a comprehensive trade and investment plan that would result in a U.S.-Africa free-trade area.[93] One of the proposed elements of this program is removal of all quotas on textiles and apparel for African countries that have made significant economic reforms or have made commitments to private industry. According to Congressman Jim McDermott (D-WA), one of the sponsors, the proposal would be especially beneficial for Sub-Saharan Africa because many emerging economies had used the textile and apparel sector to begin developing manufacturing industries and, once skills were learned in this sector, workers had moved to other industries requiring higher levels of skill.[94] Such a proposal would likely benefit Kenya, a country from which U.S. imports of textiles and apparel fell after imposition of a U.S. quota in 1995.[95]

Policy Developments in Sub-Saharan Africa

Recent policy developments in Sub-Saharan Africa are likely to affect the textile and apparel industries in the region. These developments are highlighted below.

South Africa

On August 6, 1996, representatives of South Africa and Zimbabwe announced that they had reached agreement to establish a new bilateral trade accord to replace one that had been in effect during 1964-92. The accord followed the establishment in June 1996 of three technical committees to deal with issues concerning textiles and apparel, footwear and leather, and agriculture, the sectors of Zimbabwe's economy most affected by South Africa's trade barriers.[96] South Africa agreed to reduce its duties on imports of textiles and apparel from Zimbabwe by more than half, to 30 percent effective in September 1996.[97] Zimbabwe's textile shipments to South Africa had been subject to a 75-percent rate of duty while imports from South Africa's partners in the Southern African Customs Union--Botswana, Lesotho, and Swaziland--enter duty-free.[98]

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[93] Joyce Barrett, "U.S.-African Free-Trade Zone Proposed in Congress," *Daily News Record*, June 5, 1996, p. 8.

[94] Ibid.

[95] Michael M. Phillips, "U.S. Rethinks Trade Policy with Africa," *Wall Street Journal*, July 15, 1996, p. A2.

[96] U.S. Department of State cable, "Tough Zimbabwean/South African Trade Talks Begin," message reference No. 05391, prepared by U.S. Embassy, Harare, June 13, 1996.

[97] "Zimbabwe, S. Africa in Textile Deal," *Financial Times*, Aug. 7, 1996, p. 4.

[98] "Southern Africa-Economy: High Tariffs Irk Pretoria's Neighbors," Comtex Scientific Corp., NewsEDGE/LAN, Feb. 1, 1996.

Asian textile and footwear firms with investments in South Africa are reportedly planning to invest in Lesotho and reduce their South African operations because of labor problems.[99] On July 25, 1996, the South African Clothing and Textile Workers Union began a strike after the members of the union and clothing industry employers were unable to reach agreement on several issues, including wage increases, bonuses, and maternity leave.[100] This strike was settled in early August 1996.[101]

Ethiopia

Textiles and clothing are among the major manufacturing sectors in Ethiopia. Among the most important manufacturing investments planned for 1996 is a textile factory at Arba Minch.[102] A U.S. trading firm that imports African yarn and fabric and exports used clothing and used textile machinery to African countries has expressed interest in establishing a used clothing recycling plant in Ethiopia.[103] The $15 million investment is contingent on being able to bring the used clothing into Ethiopia free of duty. The plant would initially recycle some of the more valuable fibers and sell the rest of the clothing for wearing, but eventually the plant would produce yarn for export using Ethiopian cotton. A representative of the U.S. firm stated that, although the Ethiopian textile industry is inefficient and has much outdated machinery, mill management is of high quality, workers are well motivated and work well, and wages are low.[104]

Nigeria

The annual growth rate of Nigeria's textile industry slowed from 13 percent in the 1970s to 7.5 percent in the 1980s and to less than 1 percent in 1995.[105] Consequently, the industry is operating at about 25 percent of capacity. Nevertheless, the industry is the country's second largest employer of organized labor, with approximately 250,000 workers.

A major impediment to the industry reportedly is the lack of infrastructure and services, which requires firms to provide their own generators for electricity, wells for water, security guards for protection and the like.[106] Much time must be spent on problems such as obtaining an adequate supply of diesel fuel, and productivity is lost daily due to power outages and supply shortages. The textile industry in Nigeria, like that of many other sectors, operates on a cash basis and is unable to obtain credit or loans for modernization. Absenteeism is high largely because of the need for employees to maintain their own households by continually searching for water, transportation, and adequate housing. As a result, the industry only produces "cheap" fabrics with low profit margins.

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[99] U.S. Department of State cable, "Lesotho June Roundup," message reference No. 1185, prepared by U.S. Embassy, Maseru, July 2, 1996.

[100] U.S. Department of State cable, "Mediation Fails to Break Clothing Industry Strike," message reference No. 000819, prepared by U.S. Embassy, Johannesburg, July 30, 1996.

[101] "Zimbabwe, S. Africa in Textile Deal," *Financial Times.*

[102] U.S. Department of State cable, "Executive Summary-FY 1997 Country Commercial Guide," message reference No. 00421, prepared by U.S. Embassy, Addis Ababa, June 13, 1996.

[103] U.S. Department of State cable, "Ethiopia: Used Clothing Market and Textile Investments," message reference No. 112700, Washington, DC, May 31, 1996.

[104] Ibid.

[105] "Seminar to Boost Nigeria's Declining Textile Industry," Comtex Scientific Corp., NewsEDGE/LAN, July 11, 1996.

[106] U.S. Department of State cable, "Nigerian Manufacturing: Textile Industry," message reference No. 002468, prepared by U.S. Embassy, Lagos, Mar. 13, 1996.

Demand for cotton fabric reportedly has declined because of reduced consumer buying power.[107] Although some of the older mills were suffering financially from the lack of demand, one modern mill was reported to be going from two shifts to three. Trade sources state that the African Export-Import Bank plans to lend $10 million to two Nigerian banks to facilitate development of exports of manufactured products, including textiles.[108]

Senegal

The textile industry in Senegal faces both a shortage of cotton due to declining domestic production and increases in prices due to changes in SODEFITEX, the parastatal firm that administers cotton production and sales in the country.[109] Cotton production in Senegal dropped nearly 50 percent from 1991/92 to 1994/95 to 19 million tons and is forecast to fall further to 12 million tons in 1995/96. To contain inflation and help the domestic textile industry regain competitiveness, the Government of Senegal had subsidized cotton prices to local mills at levels below the world price. In October 1995, the Government decided that the mills should negotiate cotton prices directly with SODEFITEX. The negotiatied price was about 40 percent below world cotton prices, but the cotton company is reportedly billing the textile mills at the world price in hopes that the Government will eventually make up the difference. On July 10, 1996, the Government of Senegal announced its intention to privatize SODEFITEX.[110] However, since the company has economic problems, many doubt that it will find a buyer.

A U.S. textile-trading company recently signed an agreement with Sotexxa, the "most modern textile complex in West Africa with state-of-the-art facilities that have never fully operated" to market the mill's output in the EU and the United States.[111] The mill, which is 64-percent owned by the Government of Senegal, has been shut down since September 1992. To enable the mill to obtain financing to reopen, the U.S. company will provide it with purchase orders for 6 month's of yarn production and 72 percent of its weaving capacity.

Other Countries

Low labor productivity and poor infrastructure led a Hong Kong-based knitwear manufacturer to end its 3-year operations in Ghana.[112] Workers in the plant that made sweaters and other knitwear produced 8 pieces daily compared with 12 pieces for Hong Kong workers. A lack of discipline reportedly led to defective garments. Delays of 1 to 2 weeks to clear customs and unreliable telephone, electricity, and water systems also contributed to the firm's decision to end its operations in Ghana.

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[107] U.S. Department of State cable, "Nigerian Cotton," message reference No. 005149, prepared by U.S. Embassy, Lagos, May 31, 1996.

[108] "African Export-Import Bank Extends Loans to Nigeria," Comtex Scientific Corp., NewsEDGE/LAN, July 2, 1996.

[109] U.S. Department of State cable, "Senegal's Textile Industry at Impasse with Parastatal Cotton Company as Production Falls," message reference No. 011367, prepared by U.S. Embassy, Dakar, Nov. 24, 1995.

[110] U.S. Department of State cable, "Senegal to Privatize Sodefitex, Despite French Scepticism," message reference No. 005852, prepared by U.S. Embassy, Dakar, July 19, 1996.

[111] U.S. Department of State cable, "U.S. Company to Help Restart West Africa's Most Modern Textile Mill," message reference No. 011213, prepared by U.S. Embassy, Dakar, Nov. 20, 1995.

[112] U.S. Department of State cable, "Foreign Investment in Ghana-One Step Backward," message reference No. 000131, prepared by U.S. Embassy, Accra, Jan. 11, 1996.

Mauritius has about 280 textile and apparel mills operating in its export-processing zone.[113] Because of the country's low unemployment rate (1.6 percent), the textile and apparel industry has imported foreign workers, mainly from China and South Asia. Nevertheless, the textile and apparel industry of Mauritius is facing strong competition from firms in Asian countries.[114] Higher labor costs caused by the full employment have led to reduced competitiveness.[115] As a result, the Government has placed an emphasis on developing other sectors of the economy, particularly the financial sector.

With the establishment of a democratic government in Madagascar, a process begun in 1993, the country is resuming economic reforms and building its manufacturing sector.[116] More than 150 investors, primarily apparel firms, have located in the country's free-trade zone. With severe under- and unemployment, labor is readily available and wages are low.[117] Malagasy workers are relatively easily trained and have skills needed for work in this industry.

Mozambique is privatizing many of its state-owned firms. A firm in Singapore is negotiating to buy a big textile mill, the Mocuba Textile Plant.[118] This plant also owns 400,000 hectares of cotton fields. ■

Minerals and Metals[119]

Overview

During 1994-95, the U.S. trade deficit in minerals and metals with Sub-Saharan Africa was relatively unchanged at $1.9 billion.[120] U.S. exports to the region increased 49 percent from $147.8 million in 1994 to $220.2 million in 1995. Over the same period, U.S. imports from this region grew 4 percent from $2.0 billion in 1994 to $2.1 billion.

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[113] U.S. Department of State cable, "Mauritius: Economic and Trade Forecasts," message reference No. 000513, prepared by U.S. Embassy, Port Louis, Mar. 21, 1996.

[114] U.S. Department of State cable, "The Stock Exchange of Mauritius," message reference No. 001718, prepared by U.S. Embassy, Port Louis, Sept. 15, 1995.

[115] U.S. imports of textiles and apparel from Mauritius increased 2 percent in 1995 compared with 15 and 41 percent, respectively, in 1994 and 1993.

[116] U.S. Department of State cable, "Madagascar Country Commercial Guide: Executive Summary," message reference No. 003687, prepared by U.S. Embassy, Antananarivo, July 3, 1996.

[117] U.S. Department of State cable, "Madagascar 1996 Investment Climate Statement," message reference No. 003688, prepared by U.S. Embassy, Antananarivo, July 3, 1996.

[118] "Nine Enterprises Privatized in Mozambique This Year," Comtex Scientific Corp, NewsEDGE/LAN, July 21, 1996.

[119] This sector includes a wide range of mineral and metal products: sand and gravel, clays and earths, cut and crushed stone, plaster and cement, and certain other mineral substances; ores, concentrates, slag, and metal-bearing ash; articles of stone, plaster, cement, ceramics, and glass; precious and semiprecious stones; iron and steel, base-metals, precious-metals, and metal alloys in unwrought and scrap forms; semifabricated metal products (i.e., plates and sheets, bars and rods, wire, etc.); and certain fabricated metal products (e.g., tubes and pipes, structural shapes and rails, containers, wire ropes and cables, chain, fasteners, implements, builder's hardware, forgings and castings, etc.).

[120] U.S. trade with Sub-Saharan Africa in this sector is characterized by insufficient domestic resources in the United States to meet industrial demand for key raw materials and few large-scale export markets for semifabricated and fabricated metal products outside of South Africa.

The top U.S. export markets in Sub-Saharan Africa in 1995 included South Africa, Nigeria, and Angola, as shown below (million dollars):[121]

South Africa	100.5
Nigeria	40.6
Angola	36.6
Ghana	7.1
Côte d'Ivoire	6.0
All others	29.4
Total	220.2

South Africa is the major market for U.S. exports of minerals and metals to the region, accounting for nearly 46 percent of such exports. The United States exported a wide range of semifabricated and fabricated metal products, unwrought and scrap metals, clays and earths, and glass products to South Africa, but the major identifiable export in 1995 was stainless steel scrap. Outside of South Africa, the United States exported mostly to countries with extensive U.S. corporate investment in the exploration and production of petroleum and natural gas (e.g., Nigeria, Angola, and Côte d'Ivoire) and primary metals (e.g., Ghana).[122] The United States exported a wide range of semifabricated and fabricated metal products to the region, but the major identifiable export continued to be iron and steel pipe for oil and gas line transport and drilling, primarily to Nigeria, the region's largest petroleum producer.

The top U.S. import sources in Sub-Saharan Africa in 1995 included South Africa, Zaire, and Ghana, as shown below (million dollars):[123]

South Africa	1,592.6
Zaire	128.2
Ghana	125.1
Guinea	91.0
Zimbabwe	50.2
All others	155.4
Total	2,142.5

As the world's largest producer of precious metals, diamonds, and many strategic metals,[124] South Africa continued to be the predominant source of U.S. mineral and metal imports from the region, accounting for

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[121] The value of U.S. exports of minerals and metals to all other Sub-Saharan African countries in 1995 exceeded $1,000, with the exception of Lesotho, Guinea-Bissau, and Swaziland.

[122] U.S. Department of Commerce, ITA, "1996 Country Commercial Guide for Nigeria;" ibid., "1996 Country Commercial Guide for Côte d'Ivoire," National Trade Data Bank, 1995; ibid., "1996 Country Commercial Guide for Ghana," National Trade Data Bank, 1995; and U.S. Senate, "Angola," *Country Reports on Economic and Trade Practices*.

[123] The value of U.S. imports of minerals and metals from all other Sub-Saharan African countries in 1995 exceeded $1,000, with the exception of Chad, Equatorial Guinea, Djibouti, Guinea-Bissau, Sudan, and Benin.

[124] The term "strategic metals" refers to cobalt, titanium, nickel, manganese, chromium, vanadium, zirconium, tantalum, and certain others for which there are few satisfactory substitutes in the manufacture of steel alloys and in a wide range of other industrial and high-technology applications.

74 percent of such imports. Other important sources were Zaire and Ghana, each of which provided 6 percent of U.S. imports. Major imports were platinum-group metals[125] from South Africa (nearly 38 percent of imports); diamonds from South Africa, Zaire, and Ghana (17 percent); and ferroalloys[126] from South Africa and Zimbabwe (10 percent). Other noted imports were cobalt and other strategic metals from South Africa, Zambia, Zaire, and Zimbabwe (10 percent); metal-bearing slags and dross from South Africa (7 percent); and noncalcined bauxite from Guinea (4 percent).

Recent developments in the region offer potential for additional U.S. trade and investment in this sector. Impacts of tariff reductions and nontariff barrier elimination on U.S. trade in this sector are influenced to a large extent by the actions of South Africa, the largest regional trading partner. Regional productivity in minerals and metals is enhanced by bilateral and multilateral assistance, either directed towards specific projects or for structural economic reform. Although there is currently a limited U.S. presence in the region, Sub-Saharan African countries are opening their minerals sectors to additional foreign investment through structural economic reform, liberalized investment and mining regulations, and privatization of parastatal enterprises. In addition, development of the region's oil and gas resources, and upgrading of electric-power, transportation, and other infrastructure networks offers potential opportunities for additional U.S. trade in certain iron and steel products, and other materials associated with these industries.

URA Developments Affecting Sector Trade and Investment

The dutiable value of imports of minerals and metals from Sub-Saharan Africa decreased 32 percent to $221.9 million in 1995. Only 10.4 percent of sector imports were dutiable in 1995 compared to 15.9 percent in 1994, reflecting in part a greater proportion of GSP-eligible products, such as ferroalloys, in the import mix. The ATWT on dutiable U.S. imports of minerals and metals was 4.4 percent AVE in 1995, a slight reduction from the previous year's rate of 4.8 percent AVE. South Africa, with an ATWT of 4.4 percent AVE, was the predominant source of dutiable imports, accounting for 98 percent, or $218.3 million, of such imports in 1995. The second largest source of dutiable imports was Zimbabwe, with U.S. imports of $2.0 million in 1995 and an ATWT of 3.2 percent AVE.

The most significant tariff-related changes in the minerals and metals sector in Sub-Saharan Africa were reductions undertaken by South Africa.[127] Although South Africa continued to lower its duty rates in 1995, simplification of its tariff system through consolidation of similar products classified under formerly separate listings led inadvertently to higher tariffs on some sector products. A notable example was the increase by up to 180 percent in the tariff on certain steel products. Elimination of import surcharges on October 1, 1995, did not impact the minerals and metals sector because most of these products were previously classified under the zero-percent surcharge category applied to inputs for manufacturing. Under the most recent revisions of the GEIS, subsidies to South African exporters of partially manufactured products (e.g., semifabricated and certain fabricated metal products) were lowered from 12.5 percent to 3 percent on April 1, 1995, and to 2

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[125] The platinum-group metals (PGMs) are platinum, palladium, rhodium, iridium, ruthenium, and osmium. Due to their unique catalytic properties, PGM alloys are utilized extensively in automotive emissions control, chemical synthesis, and petroleum refining.

[126] Ferroalloys contain a small portion of iron and larger portions of one or more alloy elements of silicon, manganese, chromium, nickel, molybdenum, tungsten, titanium, vanadium, and niobium. The steel industry relies upon ferroalloys as an additive in the manufacture of steel alloys and as de-oxidants, de-sulphurizing, or de-nitrating agents in ferrous metallurgy.

[127] U.S. Department of Commerce, ITA, "1996 Country Commercial Guide for South Africa;" U.S. Senate, "South Africa" *Country Reports on Economic and Trade Practices;* and USTR, *1996 National Trade Estimate Report on Foreign Trade Barriers.*

percent on April 1, 1996. Subsidies for exports of raw and beneficiated raw materials were eliminated outright on April 1, 1995. Furthermore, some products previously defined as "partially manufactured" were downgraded to "beneficiated" and were no longer eligible for subsidy payments.

Despite South Africa's expressed commitment to eventual tariff reductions under the WTO, the South African Board of Trade and Tariffs agreed to modify scheduled duty reductions on certain products manufactured by domestic industries. Reductions of import tariffs on aluminum were slowed to facilitate capacity expansion of the Pietermaritzburg aluminum sheet mill from 50,000 to 150,000 tons per annum.[128]

Economic and Trade Policies Affecting U.S.-Sub-Saharan Africa Trade and Investment

U.S. Policies

Duty-free imports of minerals and metals under the GSP from Sub-Saharan Africa totaled $221.7 million in 1995, up 90 percent from $116.6 million the previous year. GSP imports in 1995 were highly concentrated in the southern Africa region, as shown below (million dollars):

South Africa	186.2
Zimbabwe	30.7
Kenya	1.7
Tanzania	1.7
Uganda	0.5
All others	0.9
Total	221.7

South Africa accounted for 84 percent of GSP imports and Zimbabwe accounted for another 14 percent. Aside from Kenya and Tanzania, all other sources amounted to less than 1 percent. The predominant recipient of GSP provisions were ferroalloy imports, valued at $166.0 million, or about 75 percent of the GSP-eligible sector imports from the region.

Potential revisions to the Mining Law of 1872[129] and tighter environmental regulations may encourage the U.S. mining industry to further shift exploration efforts abroad, including Sub-Saharan Africa. The Metals Economics Group of Gold Fields Mineral Service estimated that global exploration expenditures on the entire African Continent reached $320 million in 1995, just exceeding the $294 million spent in the United States that same year.[130]

[128] This mill, which produces foil, can stock, and plate, will be supplied with unwrought aluminum from Alusaf's new Bayside smelter located at Richards Bay. Mbendi Information Services, "South Africa, Mining Industry," found at http://mbendi.co.za/mbendi/comb.htm, May 17, 1996.

[129] The Mining Law of 1872 regulates mining on Federally owned lands. Proposed revisions would most likely include royalty payments and restrictions on security of tenure. Although revisions have been debated in Congress and by the Administration for years, no changes were enacted in 1995.

[130] "Mining in Africa, King Solomon's Mines, Continued," *The Economist*, May 25, 1996, pp.68-71.

Development of primary-metal resources in Sub-Saharan Africa was supported by several U.S. bilateral trade and investment agencies. In August 1995, the Eximbank approved a loan guarantee of $1.3 million for a joint gold mining project in Ghana by Ashanti Goldfields Corp. Ltd. and the project sponsor, Driltech Inc.[131] Several grants by the TDA were identified that funded feasibility studies of base-metals projects in southern Africa. Partial funding of $675,000 was provided in TDA's FY 1995 budget for a feasibility study of an aluminum smelter complex in Mozambique.[132] In its largest grant to date in the African continent, TDA entered into an agreement with Industrial Development Corp. of South Africa, Ltd. in July 1995 to contribute $800,000 towards a $4.16 million feasibility study of a direct iron reduction plant in South Africa. This greenfield iron reduction plant, a priority project of the South African Government, has a planned annual capacity of four million tons and an anticipated capital budget of $800 million.[133] In a previously approved project that received partial TDA support of $630,000, Fluor Daniel was selected to perform a feasibility study for possible upgrading and expansion of the Hulett Aluminum Rolling Mill facility in Pietermaritzburg, South Africa.[134] Additionally, one of several U.S. investments in Côte d'Ivoire supported by OPIC is a gold mine which began producing in 1992.[135]

Policy Developments in Sub-Saharan Africa

Efforts by Sub-Saharan African countries that directly impact and potentially enhance production of their minerals and metals sectors include economic and investment policy reforms and privatization of parastatal companies. To varying degrees, most countries in Sub-Saharan Africa opened their minerals and metals sectors to foreign investment over the past few years. South Africa, the region's largest minerals producer, began revising its mineral policy in April 1995 with a trilateral plenary session of representatives from the Ministry of Mineral and Energy Affairs, the mining companies, and organized labor.[136] In March 1995, the Ministry of Finance announced several reforms benefitting foreign investors, including scrapping of the two-tiered foreign-exchange rate system, the Non-Resident Shareholder Tax on foreign companies, and restrictions on repatriation of profits and capital.[137]

Other efforts in the region include the recent adoption of more liberal foreign-investment and mining regulations by Zambia.[138] In addition, Zimbabwe granted foreign investors exemptions from sales taxes and certain import duties.[139] Foreign investors can now market their products outside the Minerals Marketing Corp., and they can negotiate terms for paying income taxes and repatriating profits. The Reserve Bank of Zimbabwe removed most restrictions on the repatriation of previously blocked profits and dividends from pre-1993 investments in September 1995.[140]

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[131] Export-Import Bank of the United States, Final Authorization from October 1, 1994 through July 5, 1996, facsimile received by USITC staff, July 10, 1996.

[132] U.S. Trade and Development Agency, *TDAprojects*, Apr. 1996, found at http://www.tda.gov/docs/africame.html.

[133] U.S. Trade and Development Agency, "TDA Funds $800,000 Grant for Iron Plant in South Africa," *TDAnews*, Mar. 6, 1996, found at http://www.tda.gov/docs/press/html.

[134] U.S. Trade and Development Agency, *TDAprojects*, Apr. 1996.

[135] U.S. Department of Commerce, ITA, "1996 Country Commercial Guide for Côte d'Ivoire," National Trade Data Bank, 1995.

[136] Mbendi Information Service, "South Africa, Mining Industry," found at htp://mbendi.co.za/mbendi/comb.htm, May 17, 1996.

[137] U.S. Department of Commerce, ITA, "1996 Country Commercial Guide for South Africa."

[138] Ibid., "1996 Country Commercial Guide for Zambia," National Trade Data Bank, 1995.

[139] "Zimbabwe Gives Investors Tax Break," *Platt's Metals Week*, Aug. 7, 1996, p.7.

[140] USTR, "Zimbabwe," *1996 National Trade Estimate Report.*

Many countries in the region have announced that either state-owned or state-dominated minerals and metals enterprises will be privatized; however, few projects have yet been successfully concluded. Nigeria announced its intentions to lease various parastatal enterprises, including steel mills, to local and foreign investors, for an initial 10-year period with potential for contract renewal.[141] Zaire plans to partially privatize its state copper mining conglomerate, Gecamines, by soliciting Western and Japanese investments.[142] However, the most ambitious privatization effort is that of Zambia, which has been trying to sell its money-losing copper mining conglomerate, Zambian Consolidated Copper Mines (ZCCM), since the beginning of 1995. This action is significant because copper provides some 80 percent of the country's foreign exchange. Progress on ZCCM's privatization has been slow, however, for economic and political reasons and because it is estimated that investments on the order of $2 billion are required to revive ZCCM's operations.[143]

Multilateral Lending

The focus of most multilateral lending in the mineral and metals sector is on enhancing resource management capabilities and facilitating privatization efforts. Recently, the AfDB announced several upcoming feasibility studies of mining projects in Malawi and Tanzania as part of its 1995 lending program.[144] The IDA of The World Bank recently supported mining and mineral management projects in Burkina, government reform initiatives to promote private investment in Ghana's mining industry, and economic recovery and privatization assistance to Zambia.[145] More specifically in Zambia, the IDA announced on June 4, 1996, the Economic Recovery and Investment Promotion Technical Assistance Credit, a $23 million multilateral package to support economic reforms, promote private sector business, finance privatization, and revitalize mining.[146]

Multilateral support for oil and gas projects in Sub-Saharan Africa provides additional market potential for U.S. exports of oil tubular products and related iron and steel products. Two ventures are to be appraised by the International Finance Corporation (IFC) of The World Bank-- a $20 million regional project to develop Chad's oil fields and to construct a petroleum export pipeline from southern Chad to the Atlantic coast of Cameroon, and the $245 million Songo Songo gas development project in Tanzania. [147] The IFC, however, declined to provide a $100 million loan for a proposed liquefied natural-gas project in Nigeria in November 1995, citing insufficient progress in implementation of key economic policy reforms.[148] ■

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[141] U.S. Department of Commerce, ITA, "1996 Country Commercial Guide for Nigeria."

[142] "Zaire Seeks Japanese Funds to Modernize Gecamines," *Platt's Metals Week*, Jun. 12, 1995, p. 9.

[143] U.S. Department of Commerce, ITA, "1996 Country Commercial Guide for Zambia."

[144] African Development Bank, "1995 AFDB Lending Program," African Development Bank Business Opportunities, National Trade Data Bank, Sept. 19, 1995.

[145] The World Bank, "Africa Region," World Bank International Business Opportunities Service, National Trade Data Bank, Sept. 11, 1995.

[146] The World Bank, International Development Association, "Zambia: Economic Recovery and Investment Promotion Technical Assistance Credit," *IDA News Release*, No. 95/29/AFR, Jun. 4, 1996, found at http://www.worldbank.org/html/extme/9629afr.htm.

[147] The World Bank, "Africa Region," World Bank International Business Opportunites Service, Oct. 6, 1995.

[148] The World Bank, "IFC Pulls Out of Nigeria LNG Project," *World Bank News*, Nov. 16, 1995, found at http://www.worldbank.org/html/extdr/wbn1116.html#IFC.

Machinery[149]

Overview

U.S. trade with Sub-Saharan Africa in the machinery sector, with the exception of South Africa, continues to be restrained by a number of factors, particularly by underdeveloped industrial sectors.[150] The United States, nevertheless, continued to experience an overall regional trade surplus in these products in 1995, which increased by 9 percent to $585.6 million compared to 1994.

U.S. exports of machinery to Sub-Saharan Africa increased from $581.1 million in 1994 to $638.9 million in 1995, or by 10 percent, while U.S. imports rose from $44.1 million in 1994 to $53.3 million in 1995, or by 21 percent. South Africa is the leading regional U.S. export market, accounting for $366.3 million, or 57 percent of U.S. machinery exports during 1995 as shown below (million dollars):

South Africa	366.3
Nigeria	58.9
Zimbabwe	28.9
Angola	24.8
Ethiopia	19.7
All others	140.4
Total	638.9

Many U.S. producers and exporters were forced to abandon the South African market, Sub-Saharan Africa's largest single market, after the passage of the Comprehensive Anti-Apartheid Act of 1986 (CAAA).[151] Consequently, many important machinery markets in South Africa, such as machine tools, are presently dominated by companies from Western Europe, Japan, and China. A number of U.S. producers, however, continued to service the South African market through their European subsidiaries. After the repeal of the CAAA in 1994, a number of U.S. companies rushed to regain lost market share and to take advantage of South Africa's more developed economy, infrastructure, and industrial base.[152]

[149] This sector encompasses a wide range of specialized and general machinery and consumer durables. Major product segments include farm and garden machinery, metalworking machinery, printing machinery, textile machinery, pumps and valves, mineral-processing machinery, certain electric power generation and transmission equipment, electric motors and generators, and electrical household appliances.

[150] U.S. machinery trade with the region continues to be constrained by small-scale commercial markets with limited manufacturing capabilities, distance and the absence of historical trade ties, underdeveloped or inadequate transportation infrastructure and legal systems, unreliable power supplies, shortages of raw materials and skilled manpower, and war. Also, regional economic dominance of South Africa and historic economic links to former European colonial powers have served to limit U.S. access of machinery products to these markets. The World Bank, *Adjustment in Africa* (Oxford: Oxford University Press, 1994).

[151] U.S. Department of Commerce, ITA, "1996 Country Commercial Guide for South Africa."

[152] U.S. Department of Commerce, ITA, "South Africa: Big Emerging Market," found at http://www.sta.usa.gov/bems /bemssoaf/bemssoaf.html, Aug. 12, 1996.

Agricultural and horticultural machinery, parts, and accessories accounted for $175.3 million, or 27 percent of the value of total U.S. exports of machinery to Sub-Saharan Africa during 1995, as shown below (million dollars):

Ag machinery, parts & accessories	175.3
Earth moving equipment	40.6
Pumps	21.1
Printing machinery & parts	12.8
All other	389.1
Total	638.9

The United States exported a wide range of machinery products to South Africa, whereas U.S. exports to Nigeria and Zimbabwe, the second-and third-largest regional U.S. export markets, consisted primarily of oil and gas field, construction, agricultural, and industrial machinery.[153]

U.S. exports to the CFA franc zone countries continued to expand in 1995 despite the devaluation of the CFA franc in January 1994.[154] U.S. exports of machinery to CFA franc zone nations grew by 18 percent during 1993-94 and by 35 percent during 1994-95. Although the CFA franc devaluation effectively doubled the cost of their imports of raw materials and intermediate goods, several CFA franc zone countries, such as Cameroon, benefited from the doubling in value, in local currency terms, of petroleum and other export commodities.[155] Others, such as Benin, were able to obtain foreign aid that allowed them to maintain the flow of imports necessary for economic expansion.[156]

South Africa was the leading source of U.S. imports of machinery from Sub-Saharan Africa during 1995, accounting for 92 percent of total U.S. imports, as shown below (million dollars):[157]

South Africa	49.2
Mauritius	1.6
Zimbabwe	0.7
Mali	0.6
Sierra Leone	0.4
All other	0.7
Total	53.3

[153] U.S. Department of Commerce, ITA, "1996 Country Commercial Guide for Zimbabwe," National Trade Data Bank, 1995.

[154] The countries of the CFA franc area include: Benin, Burkina, Côte d'Ivoire, Mali, Niger, Senegal, Togo, Cameroon, Central African Republic, Chad, Congo, Equatorial Guinea, and Gabon.

[155] U.S. Department of Commerce, ITA, "1996 Country Commercial Guide for Cameroon," National Trade Data Bank, 1995 .

[156] *Africa South of the Sahara* (London: Europa Publications, 1996), p. 168 and p. 234.

[157] During 1995, there were no sector imports from 26 countries in Sub-Saharan including: Benin, Botswana, Burundi, Cameroon, Cape Verde, Central African Republic, Chad, Comoros, Congo, Djibouti, Ethiopia, Eritrea, Gabon, Guinea-Bissau, Lesotho, Madagascar, Malawi, Mauritania, Mozambique, Rwanda, São Tomé and Principe, Sudan, Tanzania, Togo, Uganda, and Zambia.

U.S. imports from the region consisted principally of mineral processing machines; taps, cocks, and valves; air conditioning and refrigeration equipment; and machine tools as shown below (million dollars):

Mineral processing machines	18.4
Machine tools	2.3
Taps cocks & valves	4.7
Pumps	1.9
Ag & horticultural equipment	2.1
A/C and refrigeration equipment	2.8
All other	21.1
Total	53.7

These listed items accounted for 48 percent of the value of total U.S. imports of machinery from Sub-Saharan Africa during 1995.

URA Developments Affecting Sector Trade and Investment

The ATWT on dutiable U.S. imports of machinery from Sub-Saharan Africa declined from 3.4 percent AVE in 1994 to 2.9 percent AVE in 1995. The ATWT on imports from South Africa declined from 3.4 percent AVE in 1994 to 2.8 percent AVE in 1995, as South Africa accounted for 62 percent, or $4 million, of the $6.5 million of dutiable U.S. imports of machinery from Sub-Saharan Africa. Mauritius was the second leading source of dutiable imports, with imports of $1.6 million and an ATWT of 2.8 percent AVE.

In 1995, the two largest importers of machinery from the United States in Sub-Saharan Africa announced they would lower import duties. South Africa ended surcharges on imports of "luxury" and "white" goods, especially electrical household appliances.[158] Nigeria announced that it would lower its import duties by 35 percent across-the-board.[159] Nigeria's tariff reductions may stimulate U.S. machinery exports, particularly oil and gas field machinery, sales of which to Nigeria are expected to exceed $200 million in 1996.[160]

Economic and Trade Policies Affecting U.S.-Sub-Saharan Africa Trade and Investment

U.S. Policies

GSP imports from Sub-Saharan Africa increased by 82 percent during 1994-95 to $39.1 million. South Africa dominated GSP imports during 1995, accounting for $38.1 million, or 98 percent of the value. In 1995, GSP imports from South Africa consisted primarily of parts of crushing or grinding mineral processing machines (46 percent), jacks and hoists of a type used in garages (10 percent), parts of machinery and mechanical appliances (9 percent), parts of automotive air conditioners (6 percent), and pneumatic fluid, power type, pressure-reducing valves (4 percent).

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[158] Republic of South Africa, Department of Finance, *Budget Review* (Capetown: Republic of South Africa, 1995), pp. 5-10.

[159] U.S. Department of Commerce, ITA, "Nigeria-Tariff Reductions," National Trade Data Bank, 1995.

[160] U.S. Department of Commerce, ITA, "1996 Country Commercial Guide for Nigeria."

Eximbank, TDA, and OPIC sponsored a number of projects during 1995-96 that may generate demand for U.S. machinery and equipment. During this period, Eximbank announced that it would assist in the sale of U.S. products, especially spare parts, mining, and capital equipment in Zimbabwe and South Africa through medium- and long-term credit insurance policies, loans, and guarantees. Eximbank guaranteed a revolving loan for John Royle & Sons (Pompton Lakes, NJ) in July 1995 to export wire and cable making machinery valued at $18 million to various markets including South Africa.[161] In April 1996, Eximbank approved financing to support sales of U.S.-made oil and gas field machinery and equipment valued at $326 million to Ghana.[162] The Eximbank also authorized a long-term guarantee of $253 million to finance the export of machinery and equipment by Continental Engineering and Construction Company (Lafayette, LA) and Westinghouse International Services Co. (Orlando, FL) to Ghana. As of May 1, 1996, Nigeria was included on Eximbank's country limitation schedule that legally prohibited support. The Eximbank also placed restrictions on support for Angola based on the country's continued political instability and its outstanding arrears.[163]

The TDA has sponsored a number of projects designed to assist U.S. companies compete for infrastructure projects in Sub-Saharan Africa. Among those projects were funding for a $630,000 feasibility study by Fluor Daniel (U.S.) to upgrade and expand the Helett Aluminum Rolling Mill plant of Pietermaritzburg, South Africa, and the development of transportation infrastructure projects in the Johannesburg-Maputo corridor of South Africa.[164] TDA also initiated a number of construction and/or rehabilitation feasibility studies in 1995-96, including: a direct iron reduction plant in South Africa; an aluminum extrusion plant in the Cameroon; an aluminum smelter in Mozambique; hydroelectric, gas fired, and coal-fired electricity generating plants in Zambia, Botswana, Benin, Mozambique, Senegal, Uganda, Zambia, and Zimbabwe; a plastics factory in Ethiopia; a refinery in Ghana; and a fish-processing plant in Angola. Feasibility studies were also initiated in 1996 to study ways to train water supply and pollution control officials and agricultural workers in Malawi and Nigeria, respectively, to use U.S- made machinery.[165]

OPIC has insured or financed a number of projects in Sub-Saharan Africa, some of which could potentially generate demand for exports of U.S. machinery. Such projects include: assisting representatives of the Government of Mozambique engaged in road maintenance and rehabilitation; financing mining projects in Ghana, Côte d'Ivoire, Zambia, and Zimbabwe; financing a joint venture between BMI International of South Africa and Quickwash-Dryclean USA to open 100 laundry centers in South Africa; co-financing a $66 million expansion and modernization of Sierra Leon's Sierra Rutile Ltd., a major world producer of rutile; and continuing support for a joint venture between Cargill and National Seed Cotton and Milling Ltd. to operate two oilseed- and three rice-processing mills in Malawi.[166]

[161] Export-Import Bank of the United States, "South Africa: Final Comment," Meeting of the Board of Directors, Summary and Minutes, July 11, 1995, found at http://www.exim.gov/summary/jul95wk3.html.

[162] Export-Import Bank of the United States, "EX-IM Bank Supports U.S. Exports to Ghana Power Project," EX-IM Press Releases," Apr. 5, 1996, found at http://www.exim.gov:80/press/apr0596.html.

[163] U.S. Department of Commerce, ITA, "Angola: An Overview," FlashFax Directory for Sub-Saharan Africa, May 12, 1996.

[164] U.S. Trade and Development Agency, *TDAProjects*, Aug. 1996.

[165] Ibid.

[166] Overseas Private Investment Corporation, "Africa: A Regional Report," OPIC Factsline, Aug. 9, 1996.

Multilateral Lending

A number of international agencies have sponsored development projects in Sub-Saharan Africa designed to improve and develop water and waste management facilities, modernize transportation infrastructure (roads, bridges, etc.), improve industrial production, and increase electric power production and distribution that will need large amounts of imported technology and machinery. For example, the AfDB approved a loan for $22.2 million for road construction in Côte d'Ivoire in 1995.[167] World Bank projects approved during 1995-96 include a $60.7 million credit to Cameroon for road maintenance; transportation infrastructure projects in Cameroon, Ghana, Burkina, and Malawi; loans to Kenya, Tanzania, Zambia, Senegal, and Uganda for pollution control and water quality monitoring systems; credits for power rehabilitation projects in Niger and Mali; a $6.8 million loan to promote development of small-scale irrigation systems in Niger; and a loan for the construction of a $414 million thermal electricity generation plant in Ghana.[168] Additionally, the IFC approved $5 million in financing for a paper manufacturer in Swaziland for the purchase of $12 million in new processing equipment and a $133,000 loan to a Nigerian tile company to modernize and expand its equipment.[169] As markets become more aware of U.S. leadership in the areas of quality, reliability, efficiency, and technology in many machinery categories, demand for U.S. made machinery could increase. ■

Transportation Equipment[170]

Overview

Transportation equipment continues to be the leading sector in terms of U.S. exports to Sub-Saharan Africa, accounting for 22 percent of total U.S. exports to the region in 1995. The U.S. trade surplus with Sub-Saharan Africa in this sector increased in 1995 by $223.0 million to reach $1.1 billion.

In 1995, South Africa was the leading market for U.S. exports of transportation equipment to Sub-Saharan Africa, accounting for $506.4 million in sector exports, or 43 percent of sector exports to the region, as shown below (million dollars):

South Africa	506.4
Nigeria	174.4
Angola	112.7
Zimbabwe	51.8
Côte d'Ivoire	38.8
All other	295.9
Total	1,179.7

[167] U.S. Department of Commerce, ITA, "List of Projects in Electric Power Systems Funded by the African Development Bank," National Trade Data Bank, Aug. 1995.

[168] The World Bank, "Loan and Credit Summary," found at http://www.worldbank.org/html/extdr/loanapp.htm, Sept. 10, 1996.

[169] International Finance Corporation, "IFC to Invest in Swazi Paper Mill," press release No. 95/102, Mar. 14, 1995, and "La SFI approuve le financement de sept projets en Afrique Subsaharienne," press release No. 96/107, found at http://www.ifc.org/PUBLICAT/PRESS/REGIONS/AFRICAP1.HTM.

[170] Included in this sector are motor vehicles and motor-vehicle parts; aircraft and spacecraft; locomotives and rolling stock; ships, tugs, and pleasure boats; construction and mining equipment; miscellaneous vehicles; and engines.

Sector exports to the region are concentrated in the aircraft, construction and mining equipment, and automotive industries. Certain parts for boring or sinking machinery were the leading U.S. export to Sub-Saharan Africa, accounting for 5 percent of such exports in 1995. Certain parts of airplanes and helicopters accounted for 3 percent of U.S. exports to Sub-Saharan Africa and dump trucks for off-highway use accounted for 2 percent. Leading U. S. exports to South Africa include airplane and helicopter parts, dump trucks for off-highway use, and parts and attachments for derricks. The United States accounts for 75 percent of the civilian aircraft market in South Africa. U.S. firms are also the largest suppliers of spare parts for aircraft to that country.[171]

Nigeria and Angola accounted for 15 and 9 percent, respectively, of sector exports in 1995. The oil and gas field machinery sector is the leading nonagricultural sector for U.S. exports to Nigeria. There is no local production of this equipment in Nigeria, and U.S. exports account for over 50 percent of the market.[172] Over 80 percent of the automobiles imported into Nigeria are used vehicles, creating a market for replacement parts. Official statistics indicate that U.S. products account for over 50 percent of the replacement parts market. However, a large volume of Nigeria's imports of automotive spare parts and accessories from the United States are bought off the shelf in the United States at retail prices, brought to Nigeria as accompanied air freight, and are not recorded in U.S. export data.[173]

South Africa was the leading source of U.S. imports in 1995, accounting for $52.2 million, or 97 percent of sector imports from Sub-Saharan Africa, as shown below (million dollars):

South Africa	52.2
Zimbabwe	0.7
Mauritius	0.4
Nigeria	0.2
Botswana	0.1
All other	0.3
Total	53.9

Zimbabwe and Mauritius were the second- and third-leading sources in the region for U.S. transportation equipment imports in 1995. These countries, however, together accounted for slightly more than 1 percent of sector imports in that year. Transportation imports from the region include motor-vehicle parts and parts for railway or tramway locomotives and rolling stock.

Aside from little positive movement in the reduction of tariffs in the major Sub-Saharan African markets in 1995, trends in both U.S. and Sub-Saharan African policies favor a continuing increase in U.S. exports of transportation-related equipment. These trends include U.S., African, and multilateral project financing and domestic policies in Sub-Saharan Africa affecting mining and infrastructure development.

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171 U.S. Department of Commerce, ITA, "South Africa - Aircraft Spare Parts," Market Research Report, Feb. 8, 1996.

172 U.S. Department of Commerce, ITA, "1996 Country Commercial Guide for Nigeria."

173 Ibid.

URA Developments Affecting Sector Trade and Investment

Tariff Changes

The U.S. ATWT for transportation equipment was 3.4 percent AVE in 1995, down slightly from 3.5 percent AVE in 1994. The dutiable value of U.S. imports from the region in 1995 reached $17.4 million, a 10-percent increase over the 1994 amount of $15.8 million. In 1995, Kenya led the region with the highest ATWT of 5.3 percent AVE; Niger followed with an ATWT of 4.6 percent AVE; and Côte d'Ivoire registered an ATWT of 4.5 percent AVE.

There was little change in tariffs for principal U.S. export markets in Sub-Saharan Africa. Tariff rates in Sub-Saharan Africa that apply to the five leading U.S. export categories are shown in table 4-2.

South Africa eliminated its import surcharge on all goods effective October 1, 1995, in conformance with WTO commitments.[174] For most transportation equipment, this surcharge was 15 percent.[175] Under its WTO commitments, South Africa has reserved the right to utilize a maximum of 8 years to adjust tariffs in the motor industry downward instead of 5 and will reach a terminal maximum tariff of 50 percent.[176]

U.S. exports of passenger vehicles to Nigeria continue to be hampered by tariffs of 30 to 100 percent. Although Nigeria announced a 35-percent across-the-board reduction in import tariffs effective July 31, 1995, implementation of this tariff reduction reportedly has not been consistent. Some nontariff import restrictions still apply to aircraft and ocean-going vessels. For example, all imported aircraft and ocean-going vessels must be inspected by a government authorized inspection agent, and performance bonds and off-shore guarantees must be arranged before down payments or subsequent payments are authorized by the Ministry of Finance.[177] Nigeria requires that 40 percent of cargoes are reserved for Nigerian vessels and assesses cargo revenue fees on foreign vessels.[178]

Other URA Developments

The South African automotive sector continues to be one of the most protected industries in the South African economy. Import tariffs are 61 percent on light vehicles, 36 percent on heavy vehicles, and 46 percent on components. As an additional measure to increase local manufacturing and domestic content, and to improve the competitive position of the South African automotive industry, the Government has instituted the South African Motor Industry Development Program (MIDP). The MIDP offers several export-oriented rebates, allowances, and credits for the domestic manufacture of heavy motor vehicles, light motor vehicles, and components. According to the U.S. Department of State, the MIDP appears to create several tariff and nontariff barriers to protect the automotive industry that may or may not bring it into conflict with the WTO, but the program does not appear to qualify as a TRIM.[179]

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[174] USTR, *1996 National Trade Estimate Report.*

[175] U.S. Department of Commerce, ITA, "1996 Country Commercial Guide for South Africa."

[176] USTR, *1996 National Trade Estimate Report,* p. 307.

[177] Ibid, p. 260.

[178] U.S. Department of State cable, "Nigeria - 1996 Investment Climate," message reference No. 002774, prepared by U.S. Embassy Lagos, Mar. 1996.

[179] U.S. Department of State cable, "South Africa: WTO TRIMs Compliance (Part I: The Automotive Sector)," message reference No. 005443, prepared by U.S. Embassy Pretoria, June 1996.

Table 4-2
Sub-Saharan Africa: 1995-96 tariff rates applying to leading U.S. transportation equipment export categories, by country and value of U.S. exports

HTS No.	Product	Country	Value of U.S. exports, 1995 *($000)*	1995 tariff rate	1996 tariff rate
8431.43	Parts for boring & sinking machinery	Nigeria	90,309	25 percent	25 percent
8803.30	Parts for airplanes & helicopters	South Africa	86,654	Free	Free
8704.10	Off-highway dumpers	South Africa	70,837	20 percent	20 percent
8431.43	Parts for boring & sinking machinery	Angola	61,350	1-4 percent	1-4 percent
8431.49	Parts & attachments for construction equipment	South Africa	50,453	5-22 percent	Free-22 percent

Source: U.S. Department of Commerce.

Economic and Trade Policies Affecting U.S.-Sub-Saharan Africa Trade and Investment

U.S. Policies

GSP imports of transportation equipment from the region increased from $11.9 million to $28.8 million during 1994-95, or by 142 percent, and accounted for 53 percent of sector imports from the region in 1995. South Africa was the principal regional beneficiary of the GSP program in this sector. GSP-eligible imports from South Africa accounted for over 99 percent of all sector GSP imports from Sub-Saharan Africa and were concentrated in the motor vehicle components sector. Other countries entering transportation equipment imports under GSP in 1995 were Zimbabwe (miscellaneous motor-vehicle parts), Swaziland (transmission shafts and cranks), and Ghana (miscellaneous engine parts).

All programs of the Export Import Bank of the United States (Eximbank) are available to finance the sale of U.S. goods and services to South Africa;[180] however, the only transportation equipment-related project that has been funded recently is an oil and gas field extraction project.[181] No new Eximbank programs have been introduced in Nigeria, and Angola is ineligible for trade finance from the Eximbank because of the country's elevated business risk and its extensive outstanding arrears.[182] It is possible, however, that the Eximbank will consider supporting specific projects in Angola.[183] Eximbank has recently approved sector loans for other countries in Sub-Saharan Africa, most notably Ghana, in the oil and gas field development, gold mining, and

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180 Export-Import Bank of the United States, "Guidelines for Financing U.S. Exports - South Africa," found at http://www.exim.gov/country/ebd-y-22.html.
181 Official of the Export-Import Bank of the United States, written communication to USITC staff, July 15, 1996.
182 U.S. Department of Commerce, ITA, "1996 Country Commercial Guide for Nigeria."
183 U.S. Department of State, "Economic Policy and Trade Practices: Angola," Apr. 20, 1996, pp. 1-5.

water supply sectors.[184] Projects such as these may provide opportunities for U.S. construction and mining equipment exports.

Two feasibility studies for South Africa, one for a corn-based glycol processing facility and the other for the upgrade and expansion of a bakery and milling operation, were approved by the TDA in 1995.[185] These projects may lead to U.S. exports of construction and related equipment should they come to fruition. Other TDA-funded activities in the transportation sector (including possible export opportunities for U.S. suppliers) include--

- a TDA-sponsored orientation visit of air traffic control officials from various Sub-Saharan African nations to meet with officials of the Eximbank, the Federal Aviation Administration, and suppliers of aviation equipment and services;

- a TDA-funded orientation visit for African automotive officials to U.S. suppliers of automotive equipment and services; and

- a TDA grant for a study on a regional locomotive repair facility in Eastern and/or Southern Africa.[186]

OPIC currently has one transportation-equipment-related project in South Africa. This project involves OPIC providing slightly over $18 million in insurance to the Engelhard Corp. for the production of auto emission catalysts.[187] Prior OPIC programs continue in Nigeria, but no new programs have been introduced.[188] Additional transportation-equipment related projects have recently been approved by OPIC for other Sub-Saharan African countries, including mining projects in Ghana and Guinea and engineering and construction consulting in Mozambique.[189]

Policy Developments in Sub-Saharan Africa

The following provides information on policy developments in major transportation-equipment-related markets during 1995-96.

South Africa

As noted in the earlier sector on minerals and metals, South Africa began revising its minerals policy in April 1995. Enactment of final legislation is expected by the end of 1996.[190] Further development of the mining sector in South Africa could lead to increased U.S. exports of mining equipment.

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[184] Official of the Export-Import Bank of the United States, written communication to USITC staff, July 15, 1996.

[185] U.S. Trade and Development Agency, *TDAbrief*, Nov. 1995.

[186] Ibid.

[187] Overseas Private Investment Corporation, *1995 Annual Report*, p. 26.

[188] U.S. Department of Commerce, "1996 Country Commercial Guide for Nigeria."

[189] Overseas Private Investment Corporation, *1995 Annual Report*, pp. 25-26.

[190] U.S. Department of State cable, "South Africa Moving Toward Investor-Friendly Mineral Policies - Part II," message reference No. 000039, prepared by U.S. Embassy, Johannesburg, Jan. 1996.

South Africa continues to offer considerable potential in its long-term reconstruction and development efforts; substantial investment by the South African Government in project management, consulting, construction, and housing is expected.[191] In October 1995, the South African Government announced that $191 million would be allocated and disbursed to municipal infrastructure projects for the fiscal year ending March 1996. This funding is in addition to the $208 million that was announced earlier that month to be spent on 614 municipal infrastructure rehabilitation projects to provide services such as water, sewage treatment and removal, electricity, and roads.[192]

Although the potential for U.S. exports through government-sponsored projects exists in South Africa, a recent incident involving U.S. transportation equipment exports to South Africa points to a lack of transparency in the tender process. Boeing was awarded a contract worth over $1 billion to supply 10 airframes, but then the tender and offset were suddenly re-examined by the South African Ministry of Public Enterprises and the Department of Trade and Industry (DTI). DTI tried to gain further offset contributions from Boeing, and there were rumors of last minute lobbying by Airbus after the tender was reportedly closed. Boeing did close the deal, but felt obliged to make modest revisions to its offset package in response to pressure from DTI.[193]

Nigeria

Automotive parts and accessories rank fourth in terms of U.S. exports of nonagricultural goods to Nigeria. Automotive spare parts and accessories for vehicles of U.S. origin or specification are in high demand because of the increasing importation of such vehicles. The U.S. share of the Nigerian automotive spare parts and accessories market is expected to grow in the future, and the market itself is expected to grow at an average annual rate of slightly more than 100 percent in the next 3 years.[194]

Construction equipment ranks fifth in terms of U.S. exports of nonagricultural goods to Nigeria. Increases in imports for earth moving and road building machinery are anticipated due to the Nigerian Government's emphasis on road maintenance and reconstruction. U.S. products account for over 50 percent of the Nigerian market.[195] Nigeria's road network, though still one of the best in Sub-Saharan Africa, has deteriorated. According to a high-level government official, reconstruction of these roads nationwide will begin in 1996. U.S. construction equipment manufacturers may find export opportunities resulting from this investment in infrastructure.[196]

Multilateral Lending

Three projects in Nigeria that could potentially affect Nigeria's demand for transportation equipment were presented to the Board of the AfDB in 1995. These projects include the reconstruction of federal highways,

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[191] U.S. Department of Commerce, ITA, "1996 Country Commercial Guide for South Africa."

[192] U.S. Department of Commerce, ITA, "South Africa - Infrastructure Project Funding," Market Research Report, Dec. 8, 1995. However, these additional funds are coming from the unspent allocation for housing subsidies, highlighting problems in the Government's housing program, which was launched in June 1995.

[193] USTR, *1996 National Trade Estimate Report*, p. 309.

[194] U.S. Department of Commerce, ITA, "Nigeria - Automotive Spare Parts and Accessories," Market Research Report, July 13, 1996.

[195] U.S. Department of Commerce, ITA, "1996 Country Commercial Guide for Nigeria."

[196] U.S. Department of Commerce, ITA, "Nigeria - Earth-Moving Equipment Market Trends," Market Research Report, Nov. 8, 1995.

construction of water schemes to increase water supply in Kwara State, and construction of a fresh harbor to improve processing of landed fish at the Lagos Port, including construction of a 12 km access road.[197] In 1995, the various agencies of the AfDB disbursed $116.5 million for transportation projects in Sub-Saharan Africa and $98.7 million for public utilities, including water and sewerage projects. As noted in chapter 3, South Africa became eligible for AfDB assistance on December 31, 1995. South Africa brings an excellent potential borrower to the AfDB as well as an excellent potential business partner for U.S. firms interested in pursuing AfDB-financed procurement activities.[198] Additionally, the AfDB's co-financing partners for transportation equipment suppliers, such as the World Bank, are also providing significant resources to African countries to build highways, construct dams, revamp water systems, and generate power,[199] all affording opportunities for U.S. equipment suppliers. ■

Electronic Products[200]

Overview

Production of electronic products in Sub-Saharan Africa is minimal; most countries depend on imports to fill demand. As a result, the United States has maintained a net trade surplus with Sub-Saharan Africa, which increased from $647.4 million in 1994 to $706.6 million in 1995. U.S. exports of electronic products to Sub-Saharan Africa increased by 12 percent from 1994 to 1995, from $675.9 million to $755.5 million. Growth in exports has been driven primarily by private and public sector efforts to improve computer networks and communication infrastructures. U.S. imports of electronic products from Sub-Saharan Africa increased by 71 percent from 1994 to 1995, from $28.5 million to $48.9 million. U.S. imports have remained at relative low levels largely because of the absence of any notable direct investment in manufacturing facilities by major electronics firms.

Within Sub-Saharan Africa, South Africa is the largest market for U.S. electronic products, accounting for 70 percent of U.S. exports to the region in 1995. Other major export markets in 1995 included Nigeria, Angola, Kenya, and Zimbabwe, as shown below (million dollars):

South Africa	530.6
Nigeria	50.4
Angola	25.1
Kenya	12.0
Zimbabwe	11.0
All other	126.4
Total	755.5

[197] U.S. Department of Commerce, ITA, "Africa/AFDB - Development Project 3," Market Research Report, Dec. 4, 1995.

[198] U.S. Department of Commerce, ITA, "Africa/AFDB - Project Overview," Market Research Report, Dec. 5, 1995.

[199] Ibid.

[200] Electronic products include computers and peripherals, semiconductors, electronic components, recorded media, consumer electronics, telephone and telegraph apparatus, office equipment, optical fibers, optical goods, photographic equipment, navigational and surveying instruments, medical equipment, and watches and clocks.

U.S. sector exports to South Africa increased by 12 percent during 1994-95, whereas U.S. sector exports to Nigeria and Angola rose by 34 and 53 percent, respectively.

U.S. imports of electronic products from Sub-Saharan Africa consist primarily of various types of telecommunications and computer equipment. Mauritius, South Africa, and Côte d'Ivoire were the three largest suppliers of electronic products, accounting together for 76 percent of total U.S. imports from the region in 1995. Other sources of imports were Kenya, Mali, and Senegal, as shown below (million dollars):

Mauritius	15.9
South Africa	11.9
Côte d'Ivoire	9.5
Kenya	3.8
Mali	2.5
Senegal	1.4
All other	3.9
Total	48.9

The countries from which imports increased significantly during 1994-95 were Côte d'Ivoire (759 percent increase, or $8 million); Mauritius (46 percent increase, or $5 million); South Africa (25 percent increase, or $2 million); and Kenya (164 percent increase, or $2 million).

The widespread need for improved telecommunications and computing power industries, in which the United States is a global leader, suggests the likelihood of increased exports by the United States to Sub-Saharan Africa. Protection of intellectual property will likely continue to be a problem for the U.S. motion picture and computer software industries, despite pledges to increase such protection.

URA Developments Affecting Sector Trade and Investment

Tariff Changes

The U.S. ATWT for electronic products imported from Sub-Saharan Africa declined from 4.9 percent AVE in 1994 to 4.0 percent AVE in 1995. The dutiable value increased by 72 percent from $12.0 million in 1994 to $20.6 million in 1995. For the major source countries, the ATWT declined as follows (percent AVE):

Country	1994	1995
Mauritius	5.3	4.1
South Africa	5.1	4.4
Côte d'Ivoire	4.7	3.8

South Africa has committed to reducing the duty on imports of certain testing and measuring equipment from 50 percent ad valorem to 30 percent ad valorem under the URA, but made no other significant commitments to reduce duties on electronic products. No other Sub-Saharan African countries made duty-reduction commitments in this sector.

In 1995, South African telephone equipment suppliers petitioned the Board of Tariffs and Trade for an increase in the ad valorem duty on telephone handsets and telephone equipment from 5 percent to 20 percent, and from 0 percent to 20 percent, respectively. Although such an increase to the upper limit of GATT binding levels is permissible under the WTO framework, the move clearly violates the spirit of its tariff-reduction objectives. Other South African suppliers whose markets formerly were protected from competition by foreign producers likely will move to protect their markets to the full extent permitted under international accord.[201]

Other URA Developments

The Business Software Alliance (BSA), a global body with active antipiracy programs in over 50 countries, estimates that as much as 70 percent of South Africa's software is pirated, resulting in a net loss of over $56 million in revenue to computer firms. South African Government assistance to the BSA has led to the prosecution of 14 South African companies and organizations pirating software and the awarding of damages. A number of organizations have conducted self-audits to identify violations of the copyright act and take corrective measures.[202]

Kenya is amending its intellectual property laws to conform to the World Intellectual Property Organization guidelines and international conventions. In December 1995, Kenya's Parliament revised the Copyright Act, incorporating, among other changes, protection for computer technology and satellite transmissions. The Industrial Property (Patent) and Trademark Acts are scheduled to be amended in 1996. Given the small size of the Kenyan market, improved copyright protection would likely increase exports by less than $10 million.[203]

Economic and Trade Policies Affecting U.S.-Sub-Saharan Africa Trade and Investment

U.S. Policies

Imports entering under GSP rose from $7.7 million in 1994 to $12.2 million in 1995, or by 58 percent. Two countries, South Africa and Mauritius, accounted for 93 percent of sector imports under GSP from Sub-Saharan Africa in 1995. Imports under GSP from Mauritius were concentrated in optical goods, whereas such imports from South Africa consisted of a number of electrical instruments and appliances.

In February 1995, the Eximbank approved a loan for telecommunications services in South Africa in the amount of $8.9 million. The total cost of the project was projected to be $10.3 million.[204] Also in 1995, the TDA offered a $200,000 training grant in support of a U.S. firm's bid on Transtel of South Africa's VSAT communications network project. Subsequent to the grant, a U.S. company, Scientific-Atlanta, won a $10.2 million contract to provide a satellite earth station system that will enable voice and data communications in remote and metropolitan areas of South Africa. TDA provided a grant of $261,000 to the Ministry of Posts and Telecommunications of Swaziland for the design of cellular and data transmission

[201] USTR, *1996 National Trade Estimate Report.*
[202] Ibid.
[203] Ibid.
[204] Official of the Export-Import Bank of the United States, written communication to USITC staff, July 15, 1996.

systems. TDA also provided a training grant of $100,000 to the Zimbabwe Posts and Telecommunications Corp in support of a U.S. firm's bid to build an automated frequency management system.[205]

Policy Developments in Sub-Saharan Africa

South Africa

Although South Africa is the largest telecommunications market in Sub-Saharan Africa, with almost 40 percent of all the telephones on the continent, its telecommunications systems lag far behind those of industrialized nations. The South African Government views the telephone as an indispensable element in stimulating socio-economic development. Therefore, the state-owned telecommunications operator, Telkom, is focusing on providing "reasonable and affordable telephone access to the majority of South Africans." To that end, Telkom has a $1.4-billion, 5-year expenditure plan for the Reconstruction and Development Program, under which it intends to provide telecommunications services to 16,000 schools and 1,500 clinics within 2 years and to 40 percent of households in urban and suburban areas in 5 years. It also plans to install 26,000 lines to rural areas and redeploy equipment used during the election. In July 1995, Telkom announced a tender to install 1 million new lines within 1 year. Several U.S. companies are competing for this tender together with their consortia partners.[206]

Given this backlog and South Africa's prominence in Sub-Saharan Africa, economists predict that South Africa's telecommunications sector will grow significantly. However, Telkom has a relatively strong monopoly as the national telecommunications carrier. Even cellular phone network companies such as Vodacom and Mobile Telephone Networks -- which already have 120,000 subscribers -- have been stopped from seriously undercutting Telkom's lucrative long-distance rates. Although Telkom has recently opened up tendering for supply contracts (to local and overseas suppliers), these companies are still not allowed to set up their own competing telephone companies. Nevertheless, some competition is entering the market, as a number of companies are circumventing the regulations protecting Telkom.[207]

Two South African broadcasting companies have rented transponders on a leased satellite, enabling them to offer affordable direct-to-home broadcasting. This gives both TV companies the option of circumventing Telkom's monopoly on satellite and terrestrial feeds. Industry sources report that U.S. movie giant Viacom will use the new satellite to beam films to South Africa and that a conglomerate of banks may use it for data transfer. Some competition has also come from the growing number of "call-back" operators, which give South African callers access to cheaper U.S. telephone networks and have, as a result, already forced Telkom to cut its international tariffs. Telkom's monopoly of telecommunications services will likely continue to be eroded in the future because of modern satellite telecommunications and the merging of voice, data, image, and video technologies.[208]

Nigeria

Computers, software and peripherals, and telecommunications are among the areas expected to enjoy sustained market activity. The lack of foreign exchange is the primary obstacle to growth in this sector.

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[205] U.S. Trade and Development Agency, *TDA Brief*, Nov. 1995.
[206] U.S. Department of Commerce, *South Africa: Economic Trends and Outlook* (Washington, DC: GPO, 1995).
[207] Ibid.
[208] Ibid.

Micro- and mini-computers and state-of-the-art printers represent the best sales opportunities and are projected to account for the bulk of the imports in this import-dependent sector.[209]

In 1993, Nigeria embarked on a privatization of the telecommunications sector and since then various subsectors of this sector have been privatized as part of the Government of Nigeria's move to modernize the telecommunications sector. There is ongoing replacement of Nigeria's outdated telecommunications infrastructure through both multilateral and government funding. However, announcements of Nigeria's intent to commercialize telecommunications have not yet yielded results. Conflicting guidelines on licensing and monitoring make entry into this area extremely difficult. While U.S. suppliers will continue to face aggressive competition from European and Asian companies, equipment of U.S. origin is generally regarded to be superior.[210]

Kenya

Although Kenya's electronics industry is still in its infancy, key opportunities for direct investment, joint ventures, and subcontracting exist. The Government of Kenya has accepted that liberalization of this sector is essential. Opportunities in strategic alliances or joint ventures in telecommunications should develop in the near future, especially in the areas of cellular telephone and value add-ons to the traditional telephone system.[211]

Multilateral Lending

During 1992-95, the AfDB approved several programs, projects, and studies for telecommunications. The Ethiopian Telecommunications Authority borrowed $48 million for a project which will upgrade and expand telecommunications services. The Tanzania Post & Telecommunications Corp. borrowed $30 million for a project which includes a telephone exchange and national transit exchange and an optical fiber cable system and microwave link. The Post and Telecommunications Corp. of Zimbabwe borrowed $40 million for the provision of an external line plant, protection units, transmission, and a factory and repair center. The four projects combined are valued in excess of $180 million. Many other AfDB projects, some approved prior to 1992, continue to offer opportunities for U.S. companies.[212] ■

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[209] U.S. Department of Commerce, "1996 Country Commercial Guide for Nigeria."

[210] Ibid.

[211] U.S. Department of Commerce, "1996 Country Commercial Guide for Kenya."

[212] African Development Bank, "Procurement Opportunities Through Projects Approved by the African Development Bank," African Development Bank Business Opportunities, National Trade Data Bank, Apr. 30, 1996.

Miscellaneous Manufactures[213]

Overview

Sub-Saharan Africa continued to be a very minor trading partner for the United States in 1995 in terms of products classified as miscellaneous manufactures. The U.S. trade surplus in miscellaneous manufactures totaled a modest $4.3 million in 1995, down from $12.3 million in 1994. In the same period, U.S. exports declined by 27 percent, from $70 million to $51 million, while U.S. imports fell from $58 million to $47 million, or by 19 percent.

Many countries in Sub-Saharan Africa have relatively high tariffs, fees, or quantitative restrictions on products in the miscellaneous manufactures category in order to discourage imports and to save limited foreign exchange reserves for imports of food, machinery, and other essential or industrial inputs. Consequently, U.S. exports to Sub-Saharan Africa of products in the miscellaneous manufacturers sector are small. The primary market for U.S. exports of these products in 1995 was South Africa, accounting for $37.7 million, or 74 percent of total sector exports to Sub-Saharan Africa, as shown below (million dollars):

South Africa	37.7
Nigeria	2.6
Angola	1.6
Seychelles	1.1
Mauritius	1.1
All other	6.8
Total	50.9

Major U.S. export items to South Africa in this sector in 1995 included coin-operated games ($5 million), leather automobile-seat parts ($4 million), golf equipment ($4 million), and gymnasium and other exercise equipment ($1 million).

U.S. imports of sector products from Sub-Saharan Africa continue to be relatively small as the manufacturing bases in many Sub-Saharan African countries are not sufficiently diversified to produce such products at competitive prices. Major sources for sector imports from Sub-Saharan Africa in 1995 are shown below (million dollars):

Zimbabwe	13.2
South Africa	11.6
Swaziland	3.8
Mauritius	3.8
Tanzania	3.3
All other	10.9
Total	46.6

[213] Miscellaneous manufactures encompasses a very broad group of commodities. Examples include: luggage and other leather goods; musical instruments; jewelry; bicycles; furniture; writing instruments; lamps; prefabricated buildings; toys and dolls; games and fairground amusements; sporting goods; smokers' articles; brooms; and grooming articles.

The most important sector imports from Sub-Saharan Africa in 1995 were jewelry and semiprecious stones ($19.7 million); paintings, certain collectors' items, and antiques ($6 million);[214] wood furniture, excluding antiques ($4.5 million); and wigs ($1.4 million). Virtually all of the imports from Zimbabwe consisted of gold for jewelry manufacture ($6.3 million) and gold necklaces and chains ($5.8 million). Imports from South Africa were concentrated in wood furniture and furniture parts ($3.8 million). Growing import items from South Africa included works of art ($1.2 million) and wigs ($1 million).

URA Developments Affecting Sector Trade and Investment

The U.S. ATWT on miscellaneous manufactures declined slightly from 6.1 percent AVE in 1994 to 6.0 percent AVE in 1995, reflecting lower tariffs on certain consumer goods. The value of dutiable U.S. imports of products from Sub-Saharan Africa in the miscellaneous manufactures sector decreased from $9.0 million in 1994 to $6.3 million in 1995. U.S. import duties were applied to only 13 percent of trade in 1995.[215] In 1995, South Africa supplied the highest amount of dutiable products at $2.5 million, with an ATWT of 6.3 percent AVE, up from 5.9 percent in 1994. Mauritius followed with $700,000 of dutiable imports with an ATWT of 5.2 percent AVE.

Economic and Trade Policies Affecting U.S.-Sub-Saharan Africa Trade and Investment

U.S. Policies

In 1995, imports of miscellaneous manufactures from Sub-Saharan Africa that entered duty free under the GSP increased 44 percent over 1994 and totaled $28.4 million, or 61 percent of sector imports from the region in that year. Zimbabwe accounted for 44 percent of sector imports under GSP, followed by South Africa, with 24 percent, and Swaziland, with 13 percent. GSP-eligible imports from Zimbabwe in the miscellaneous manufactures category consisted primarily of jewelry of precious metal. Wood furniture was the major miscellaneous manufactures item imported under GSP from both South Africa and Swaziland.

From the U.S.-policy side, the abeyance of the GSP caused some hardship for Botswana companies marketing to the United States. In early 1996, one large gold jewelry manufacturer reported that continued uncertainty about renewal of GSP was undermining its ability to compete with Mexican firms.[216]

Policy Developments in Sub-Saharan Africa

South Africa is the only country in Sub-Saharan Africa that has a diversified export base for products in the miscellaneous manufactures sector. For many of the remaining countries in the region, the ability to produce export-quality finished goods in this sector continue to be hindered by low capacity utilization due to cash-

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[214] Antiques, collectors' items, and works of art enter the United States free of duty.

[215] Imports entering under GSP and most-favored-nation (MFN) free imports, which primarily consist of antiques, collectors' items, sculptures, and works of art, account for the bulk of the sector trade from Sub-Saharan Africa.

[216] U.S. Department of State cable, "USITC Study on U.S.-Africa Trade Flows," message reference No. 003450, prepared by U.S. Embassy, Gaborone, Aug. 1, 1996.

flow problems, a shortage of maintenance and equipment, low levels of investment, or weak technological and human resource capacity. Moreover, small domestic markets, lack of foreign exchange and foreign exchange controls, and a poor infrastructure that impedes efficient delivery continue to constrain the level of U.S. exports to Sub-Saharan Africa.[217] ■

Services[218]

Overview

Sub-Saharan Africa has few nations in which indigenous service providers are active internationally. Underdeveloped communication and transportation infrastructures have hindered the development of services trade, with the exception of tourism in some parts of the continent. The scheduled commitments of Sub-Saharan African countries under the WTO's General Agreement on Trade in Services (GATS) are currently modest and are likely to have a negligible impact on U.S. trade in the immediate future. However, the additional transparency of rules created by the WTO services schedules and the promise of greater efficiency of dispute resolution under the GATS may well assist U.S. exports and investment in parts of the region during the short term. The longer term effects may be considerable, given that GATS signatories have committed to participate in negotiations to liberalize international trade and investment in services.

Among Sub-Saharan African countries, South Africa offers the most extensive GATS schedule of commitments. A basic listing of service industries in which countries in Sub-Saharan Africa made commitments is found in table 4-3.

URA Developments Affecting Sector Trade and Investment

This section furnishes an update of the four specific service industry negotiations that were "extended" following the creation of the WTO on January 1, 1995. These four areas include (1) financial services, including banking, securities, insurance and related services; (2) movement of natural persons,[219] i.e., the ability to obtain visas for one country's nationals to work temporarily in another; (3) basic telecommunications,[220] e.g., voice and data transmission; and (4) maritime services. The latter includes three major parts: international shipping services, including multimodal shipping (which refers to seamless through-service using one bill of lading to meet customer needs for land-sea-land transportation of cargoes); related maritime services such as freight forwarding and customs clearance operations; and port and warehousing services.

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[217] United Nations Conference on Trade and Development (UNCTAD), *The Least-Developed Countries: 1995 Report Mid-Term Review* (New York: UNCTAD, 1995), p. 53.

[218] The services sector includes, among others, audiovisual, investment, tourism, hotel, restaurant, tour operator, travel agent, insurance, leasing, environmental, banking, securities, distribution, education, advertising, legal, health care services, accounting, architectural, engineering, construction, rail, truck, maritime, telecommunication, and information services.

[219] As meant here, a natural person is an individual citizen of a given country that temporarily enters a foreign market for the purpose of providing services.

[220] Basic telecommunication services entail the transmission of customer-supplied information between two or more points without change in form or content.

In the area of financial services, South Africa was the only Sub-Saharan African nation that participated formally in the extended WTO/GATS negotiations that ended on June 30, 1996.[221] A few other Sub-Saharan countries, however, have limited schedules for some parts of financial services dating back to commitments they made at the end of the Uruguay Round in December 1993 and finalized at Marrakesh in April 1994 (table 4-3).[222] Under an agreed interim accord, the WTO/GATS financial services commitments and MFN exemptions are scheduled to be in effect from August 1, 1996[223] through November 1, 1997. Beginning November 1997, any WTO trading partner may change the financial services portion of its schedule of commitments, either offering further commitments or withdrawing commitments it has already scheduled. If a new, permanent, financial services agreement can be negotiated and agreed upon during the period November 1-December 31, 1997, it will take effect on January 1, 1998.

The United States took a broad MFN exemption in its own GATS financial services schedule of commitments, which basically guarantees foreign financial institutions currently operating in the United States the right to continue doing so, but not guaranteeing liberalization in terms of future market entry and regulatory treatment questions. It is unlikely that Sub-Saharan financial institutions currently operating in the U.S. market would be adversely affected by such a restriction, at least in the short term.

In regard to the extended negotiations for the movement of natural persons, no Sub-Saharan nation was especially active in the discussions surrounding the issue and little progress was achieved during the talks. These negotiations ended June 30, 1995.

With respect to the extended basic telecommunications negotiations, Côte d'Ivoire and Mauritius made new offers. Both these offers, along with those of 34 other countries, were evaluated by the United States Trade Representative as "requiring improvement."[224] Although South Africa had indicated it would make an improved offer, it failed to do so.[225] On April 30, 1996, these basic telecommunications negotiations were extended for a further period scheduled to end on February 15, 1997.

Finally, for maritime services, the extended negotiations were "suspended" until the year 2000 on June 28, 1996.[226] Forty-two nations participated in these talks, 24 of which made offers. The United States did not make an offer. In regard to Sub-Saharan Africa, Nigeria and South Africa participated and made either new

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[221] Discussions of a procedural kind and the refinement of country schedules and commitments continued until July 30, 1996.

[222] See USTR and U.S. Department of the Treasury, "Assessment of Schedules and MFN Exemptions, Insurance," and "Assessment of Schedules and MFN Exemptions -- Financial Services, Excluding Insurance," Apr. 1996.

[223] There are reports, however, that technical difficulties may delay the implementation of the interim accord to a somewhat later date. As of August 26, 1996, the interim accord was in effect, but Brazil, Egypt, Greece, Italy, the Philippines, and Spain had still not ratified the Second Protocol. The window for signature had been extended to November 30, 1996, for these six countries. USITC staff electronic mail exchange with U.S. Mission, Geneva, June 18-19, 1996 and Aug. 26, 1996.

[224] USTR, "Statement of Ambassador Charlene Barshefsky, Basic Telecom Negotiations," press release 96-40, Apr. 30, 1996, found at http://www.ustr.gov/releases/1996/04/96-40.html.

[225] Ibid.

[226] *Inside U.S. Trade*, June 7, 1996, p. 3. Also, U.S. Department of State cable, "WTO Maritime Negotiations: Demarche Request," message reference No. 123126, prepared by the U.S. Department of State, Washington, DC, June 1996. Also, "WTO Talks on Global Shipping Suspended," *Journal of Commerce*, July 1, 1996; "WTO Maritime Committee Puts Talks on Hold Until 2000, at U.S. Request," *BNA International Trade Daily*, July 2, 1996.

Table 4-3
Sub-Saharan Africa: Summary of scheduled commitments under the General Agreement on Trade in Services

Country	Service(s)										Tourism and travel	MFN exemptions
	Profes-sional	Commu-nication	Construc-tion	Distri-bution	Educa-tion	Environ-mental	Financial	Health/ Social	Recrea-tional	Transpor-tational	Other		
Angola							x		x			x	x
Benin	x						x			x		x	x
Botswana	x	x										x	
Burundi	x			x								x	
Cameroon	x											x	x
Chad												x	
Central African Republic	X	X				X			X			X	
Côte d'Ivoire	X		X							X		X	X
Congo									x			x	x
Djibouti		x							x			x	
Gabon	x		x				x					x	x
Gambia	x	x	x	x	x	x	x	x	x	x	x	x	
Guinea	x					x		x		x		x	
Guinea-Bissau									X			X	
Kenya		x					x			x	x	x	
Lesotho	x	x	x	x	x	x	x			x	x	x	
Madagascar	x												
Malawi	x		x				x	x				x	
Mali					x							x	x
Mauritania												x	
Mauritius		x										x	
Mozambique							x						
Niger										x		x	x
Nigeria		x					x			x		x	
Namibia	x											x	
Rwanda	x				x	x			x			x	
Sierra Leone	X	X	X		X	X	X	X	X	X		X	X
South Africa	x	x	x	x		x	x			x	x	x	x
Senegal	x	x		x					x	x		x	x
Swaziland	x							x				x	x
Tanzania												x	
Togo			x						x			x	
Uganda												x	
Zaire	x	x	x		x				x			x	
Zambia	x		x					x				x	
Zimbabwe		x					x					x	

Source: Prepared by staff of the U.S. International Trade Commission.

offers or revised offers based on the original UR schedules. Those countries that did offer a schedule of commitments have until July 30, 1996, to freeze the commitments made in these offers or to withdraw them.[227]

Economic and Trade Policies Affecting U.S.-Sub-Saharan Africa Trade and Investment

U.S. Policies

On November 28, 1995, the U.S. Federal Communications Commission (FCC) issued an order to add a new analysis to the FCC's public interest review for foreign investment in the U.S. telecommunications market.[228] When considering foreign applications for investment in the U.S. market, the FCC will now determine if U.S. companies have effective opportunities to compete or invest in the relevant country of domicile of the applicant, as well as whether foreign carrier applicants have market power and, thus, the potential to act in an anticompetitive manner in either their home or U.S. markets.[229] It is judged unlikely that Sub-Saharan telecommunications carriers will be materially affected by the new rule over the short term.

Through the Leland Initiative, the U.S. Agency for International Development (USAID), in cooperation with private firms, is attempting to bring full Internet connectivity in up to 20 USAID countries in Sub-Saharan Africa. This project is an attempt to assist African nations to enter the information age and to ensure that effective use is made of the Internet in those institutions that contribute to the sustainable development of USAID-assisted countries in Africa.[230]

Policy Developments in Sub-Saharan Africa

Zimbabwe continues to attempt to persuade foreign insurance companies to reduce their current majority holdings to minority ones.[231] Zimbabwe made no commitments for insurance services in its WTO/GATS services schedule, thus providing no transparency for its current rules or making any provision to guarantee market access or national treatment for foreign insurance investment.[232] ■

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[227] "WTO Maritime Committee Puts Talks on Hold Until 2000, at U.S. Request." *BNA International Trade Daily*, July 2, 1996.

[228] "FCC Adopts New Rules on Foreign Carrier Entry into U.S. Markets," (IB docket 99-22), *NEWSReport* No. DC 95-137, International/News-Releases.

[229] Ibid.

[230] U.S. Agency for International Development, "Leland Initiative Africa II Gateway," found at http://www.info.usaid.gov/regions/afr/leland/enduser.htm.

[231] USITC staff interviews with U.S. insurance executives, 1994-1996.

[232] WTO, GATS, *Zimbabwe, Schedule of Specific Commitments*, GATS/SC/94, Apr. 15, 1994.

CHAPTER 5
Progress in Regional Integration In Sub-Saharan Africa

Introduction

This chapter highlights some of the achievements and developments of regional integration organizations in Sub-Saharan Africa during 1995-96. This chapter focuses on developments in the Common Market for Eastern and Southern Africa (COMESA), the Southern African Customs Union (SACU), the Southern African Development Community (SADC), the West African Economic and Monetary Union (WAEMU), and the Permanent Tripartite Commission for East African Cooperation (PTC/EAC). The chapter also provides information on the Cross-Border Initiative (CBI), an activity funded by the European Union (EU) and various multilateral organizations to assist certain Sub-Saharan African countries in meeting their regional integration commitments. Table 5-1 shows the participation of Sub-Saharan African countries in these various regional groups. The chapter additionally provides information on U.S. trade with selected regional organizations as requested by the United States Trade Representative.

The most visible trade-related activity undertaken toward regional integration in Sub-Saharan Africa was the progress made in developing a trade protocol by SADC members in 1996. In March a delegation from the SADC Secretariat held meetings with various U.S. agencies to discuss among other issues, the development of the trade protocol. Other trade-related activities include a report on implementing a common external tariff by COMESA and work in progress on a harmonized external tariff under the CBI. Additional activities include the institutionalization of the PTC/EAC, discussions on merging SADC and COMESA, the expansion of the CBI, and the negotiations in the SACU on a new customs union structure and revenue-sharing formula.

Cross-Border Initiative

At the Global Coalition for Africa at the Maastricht Conference on African Development in July 1990, the EU committed to promote ways in which the donor community could be more supportive of African regional economic integration. The result was the Initiative to Facilitate Cross-Border Trade, Investment, and Payments in Eastern and Southern Africa and the Indian Ocean, now known as the Cross-Border Initiative (CBI). The EU, the African Development Bank, the International Monetary Fund, and the World Bank are all funding sponsors.[1]

The CBI is not a regional integration organization but is an integrated program working to improve the success of existing regional integration organizations. The CBI helps to establish conditions in participating countries that will facilitate cross-border economic activities.[2]

[1] European Commission, *Cross-Border Initiative: Eastern and Southern Africa and Indian Ocean* (Brussels: European Commission, 1995).
[2] Ibid., p. iii.

Table 5-1
Sub-Saharan Africa: Participation in selected regional integration groups, by country[1]

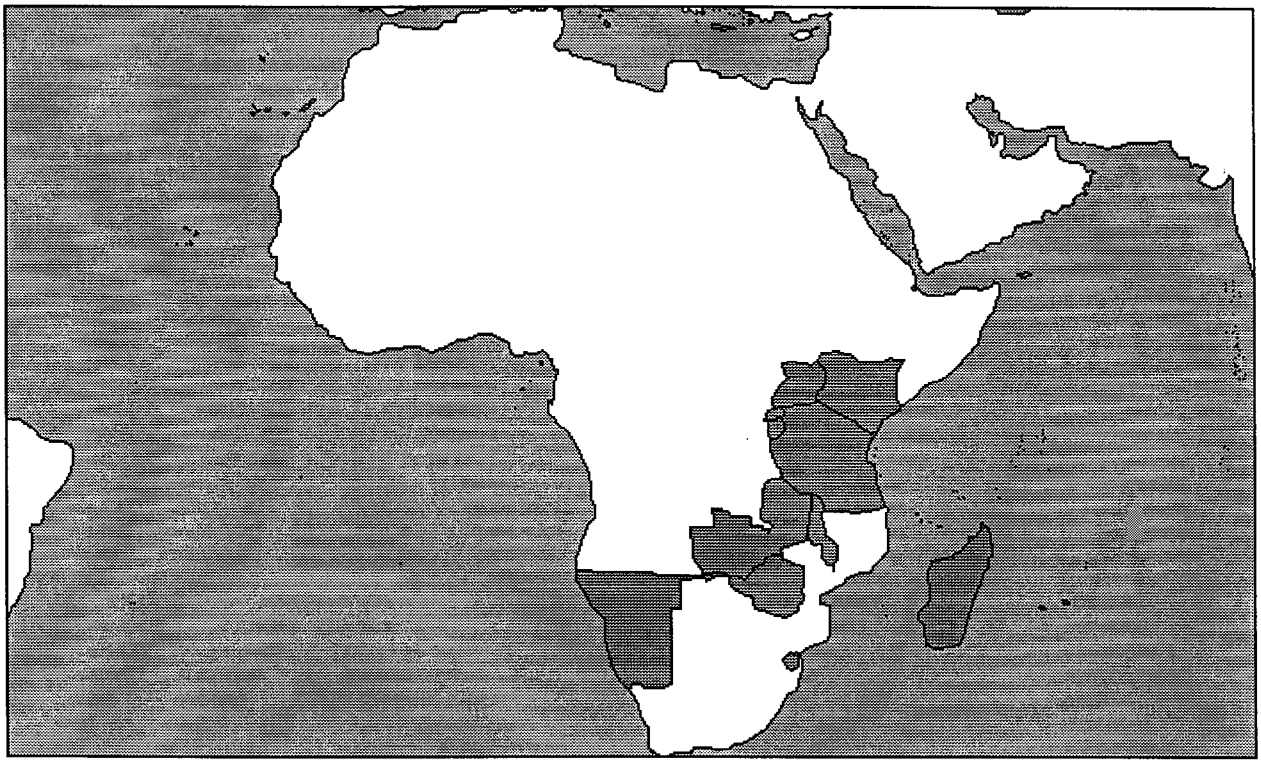
Country	CBI	COMESA	SACU	SADC	WAEMU	PTC/EAC
Angola		X		X		
Benin					X	
Botswana			X	X		
Burkina Faso					X	
Burundi	X	X				
Cameroon						
Cape Verde						
Central African Republic						
Chad						
Comoros	X	X				
Congo						
Côte d'Ivoire					X	
Djibouti						
Equatorial Guinea						
Eritrea		X				
Ethiopia		X				
Gabon						
Gambia, The						
Ghana						
Guinea						
Guinea-Bissau						
Kenya	X	X				X
Lesotho		X	X	X		
Liberia						
Madagascar	X	X				
Malawi	X	X		X		
Mali					X	
Mauritania						
Mauritius	X	X		X		
Mozambique		X		X		
Namibia	X	X	X	X		
Niger					X	
Nigeria						
Rwanda	X	X				
São Tomé & Principe						
Senegal					X	
Seychelles	X					
Sierra Leone						
Somalia						
South Africa			X	X		
Sudan		X				
Swaziland	X	X	X	X		
Tanzania	X	X		X		X
Togo					X	
Uganda	X	X				X
Zaire		X				
Zambia	X	X		X		
Zimbabwe	X	X		X		
Total member countries	**14**	**20**	**5**	**12**	**7**	**3**

[1] CBI - Cross-Border Initiative, COMESA - Common Market for Eastern and Southern Africa, SACU - Southern African Customs Union, SADC - Southern African Development Community, WAEMU - West African Economic and Monetary Union, PTC/EAC - Permanent Tripartite Commission for East African Cooperation.

Source: Prepared by staff of the U.S. International Trade Commission.

Offers to participate in the CBI were extended to three regional organizations: COMESA,[3] SADC, and the Indian Ocean Commission.[4] Seventeen nations participated in discussions with the sponsors to create a framework to assist countries in implementing the policy measures that already existed in these organizations' preexisting regional arrangements. Of these 17 countries, 14 countries decided to carry out the CBI-supported reform agenda. Participant countries include Burundi, Comoros, Kenya, Madagascar, Malawi, Mauritius, Namibia, Rwanda, Seychelles, Swaziland, Tanzania, Uganda, Zambia, and Zimbabwe, as shown in figure 5-1.[5]

Figure 5-1
The fourteen countries participating in the Cross-Border Initiative



Source: Compiled by staff of the U.S. International Trade Commission from PC Globe.

Participating countries established country-specific Technical Working Groups (TWGs), which included participation from both the public and private sectors during the initial phases of the CBI. These TWGs then agreed, along with the national governments, to the CBI Concept Paper drafted by the four sponsoring

[3] At that time it was the Preferential Trade Area .
[4] Comoros, Madagascar, Mauritius, Réunion, and Seychelles.
[5] Ibid., pp. 1, 56.

organizations. Thirteen nations and several regional institutions formally endorsed the Concept Paper at the August 27, 1993, ministerial meeting in Kampala.[6]

The concept paper set out the following four principles:[7]

- **Deep integration**, involving dismantling of payments, transport and other barriers, and the enhancing of factor mobility through deregulation of capital and labor flows;

- **Comparative advantage**, becoming the driving force behind the integration process, in contrast to the previously unsuccessful experience with "top-down" regional integration schemes;

- **Outward orientation**, involving integration through external trade liberalization in order to reduce inefficient investment and trade diversion;[8] and

- **Self-selection**, in which each participant country would set the pace of liberalization according to its own needs, thus allowing faster reformers to proceed ahead.

CBI financing helps member countries to cope with the possible negative transitional effects of proposed reforms, such as the initial loss of budgetary revenue due to reduction or elimination of import tariffs. Financial requirements to set up the CBI-supported reforms have been estimated at $30 million per country, with assistance decided for each country on a case-by-case basis.[9]

Participant countries have maintained a strong commitment to the CBI and have reported substantial progress with trade reform. However, in March 1995, many countries expressed concerns at the second ministerial meeting on the CBI in Mauritius.[10] Concerns focused on the adverse impact of tariff reduction on tax revenues and the resulting decline in revenue; the lack of technical assistance in designing and implementing CBI policies; and the need for developing a regional infrastructure as a complementary factor to ease regional trade and to attract foreign investment. The countries that had taken the lead in starting the CBI actions expressed the concern that they would face an undue cost without reciprocal actions by the other countries. These nations recognized that some of their actions were beneficial despite the absence of reciprocal actions or immediate benefit.[11]

At the Third Meeting of the TWGs in April 1996, the participant countries recognized the need to take measures rapidly to dismantle the barriers to the cross-border flow of goods and factors among themselves while simultaneously integrating their economies into the world economy.[12] Most countries reported generally good, but varied, progress in moving forward on the CBI-supported reform agenda. Substantial progress has occurred in investment deregulation, in removing the barriers to the flow of persons, in moving toward market-determined exchange rates and in removing nontariff barriers, particularly in foreign exchange

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[6] Ibid., p. 56.

[7] Ibid., p. 58.

[8] This is also of principal concern because the cosponsors, principally the World Bank, explicitly state that support will be withdrawn if the CBI countries do not conform to the agreed upon reforms and instead become a "closed" preferential trading bloc.

[9] European Commission, *Cross-Border Initiative.*

[10] Kevin Cleaver and Nicolas Gorjestani, "Cross-Border Initiative: Second Ministerial Meeting," Mauritius, Mar. 23-24, 1995 (unpublished minutes submitted Apr. 11, 1995 to the World Bank), Annex II, p. 1.

[11] Ibid.

[12] Ibid..

allocation and export licensing.[13] Tariff reform has had varied progress, with Zambia, Uganda, and Malawi progressing the furthest, while Kenya, Tanzania, and Uganda have made considerable progress in removing the cross-border barriers among themselves due to the resurgence of the PTC/EAC.[14]

The CBI plans to focus on implementing changes proposed under a new harmonized external tariff (HET) in the coming year.[15] The HET structure is seeking to integrate previous objectives on tariffs and tariff structure that include eliminating tariffs on intraregional trade and lowering the trade-weighted average tariff to not more than 15 percent. These proposals are to be completed by 1998.[16] Three countries--Zambia, Uganda, and Malawi--have already implemented most of these changes; thus, Tanzania, Zimbabwe, Mauritius, and Kenya will likely be the focus of concentration for 1996. Success in these seven nations in implementing CBI-proposed reforms is hoped to accelerate the reform process in the slower reforming countries.[17] The CBI countries have also continued to make progress in establishing policy coordination mechanisms and in specifying country specific actions to implement the CBI-supported reform agenda, as shown in table 5-2.

As shown in table 5-2, 11 participating countries have established a Policy Implementation Committee at the ministerial level, and another two, Madagascar and Tanzania, expect to complete the process shortly. The Committee's responsibilities are to manage the preparation and implementation of country reforms. Ten countries have prepared their Letter of CBI Policy (LCBIP), which elaborates on the country's official position and timetable for the implementation of the measures described in the initial CBI Concept Paper. This LCBIP is a prerequisite for program participation. Five countries have completed discussions with the cosponsors and have agreed on LCBIPs, and Comoros should do so shortly. Technical assistance has been provided by the sponsors to 13 countries as of September 1, 1996. The World Bank has provided grants under its Institutional Development Fund to eight countries in support of the CBI. Zambia and Malawi have received balance of payment assistance from the World Bank in support of the CBI reform agenda for regular adjustment operations.[18]

Common Market for Eastern and Southern Africa

COMESA was established on December 8, 1994, in response to the lack of member countries' success in improving their economies under COMESA's predecessor organization, the Preferential Trade Area (PTA).[19] The COMESA includes 20 countries in Sub-Saharan Africa: Angola, Burundi, Comoros, Eritriea, Ethiopia, Kenya, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Rwanda, Sudan, Swaziland, Tanzania, Uganda, Zaire, Zambia, and Zimbabwe, as shown in figure 5-2.[20]

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[13] Ibid.
[14] Ibid.
[15] Ibid.
[16] Ibid.
[17] Ibid., pp. 2-3.
[18] Ibid., p. 2.
[19] Facsimile received by the staff of the U.S. International Trade Commission from the Secretariat of the COMESA, Development, Finance & Technical Cooperation, July 29, 1996. The PTA was the same group of countries as COMESA, with the addition of Djibouti and Seychelles.
[20] Ibid.

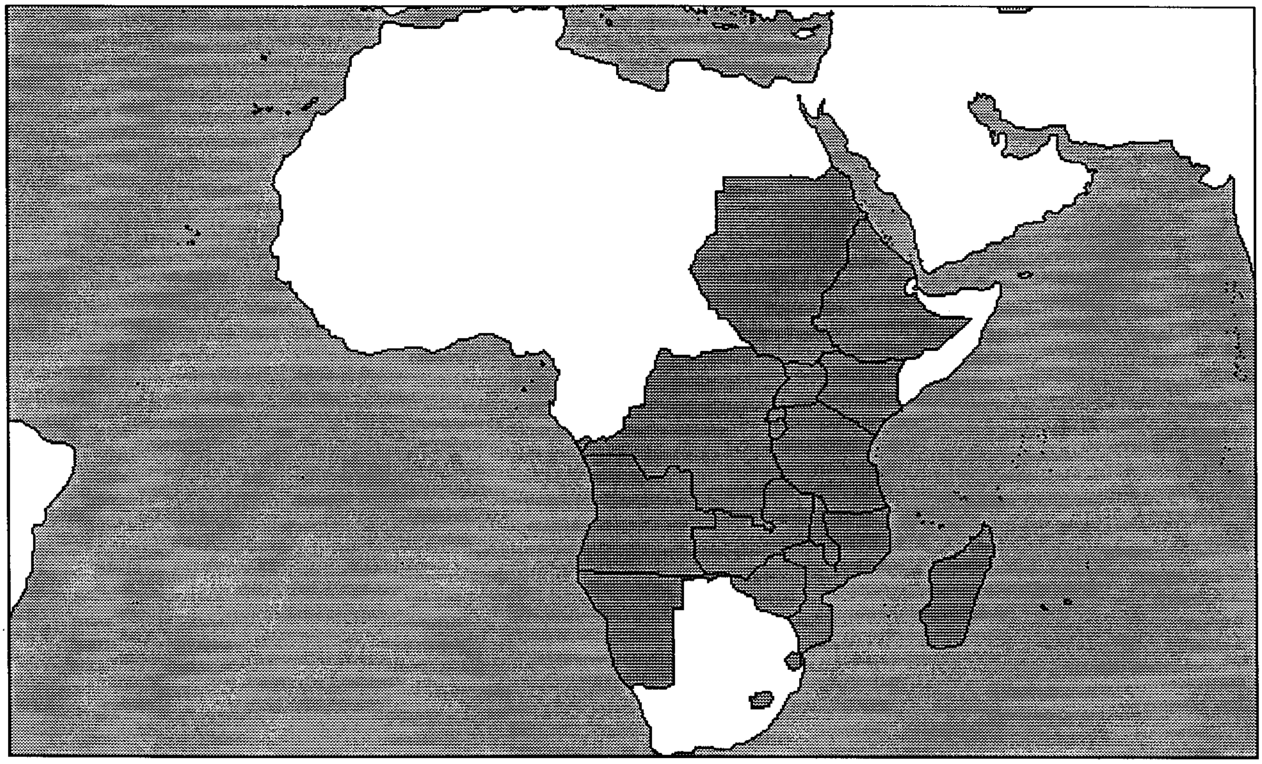
Table 5-2
Cross-Border Initiative (CBI) Technical Working Group Meeting, April 1-2, 1996 implementation status

Country	Policy Implementation Committee (formally constituted)	Letter of CBI Policy (submitted to cosponsors)	Letter of CBI Policy (discussed with cosponsors)	Letter of CBI Policy (agreed)	Institutional support[1]
Burundi	Yes	In process	No	No	WB: PSD[2]
Comoros	Yes	Yes	In progress	No	WB:MERCAP[3] EU: IMANI
Kenya	Yes	Yes	In progress	No	EU: IMANI WB: IDF
Madagascar	In process	No	No	No	EU: IMANI
Malawi	Yes	Yes	Yes	Yes	EU: IMANI WB: IDF BOP[4] EU & WB
Mauritius	Yes	Yes	Yes	Yes[5]	EU: IMANI
Namibia	Yes	Yes	In progress	No	WB: IDF EU: IMANI
Rwanda	No	No	No	No	
Seychelles	Yes	Yes	No	No	EU: IMANI
Swaziland	Yes	Yes	In progress	No	WB: IDF EU: IMANI
Tanzania	In process	No	No	No	EU: IMANI WB: IDF
Uganda	Yes	Yes	Yes	Yes	EU: IMANI WB: IDF
Zambia	Yes	Yes	Yes	Yes	WB: IDF EU: IMANI BOP: EU & WB
Zimbabwe	Yes	Yes	Yes	Yes[6]	EU: IMANI WB: IDF

[1] Support from the European Union (EU) is through a contract with the Imani Development Company in Zimbabwe, and support from the World Bank (WB) comes through technical assistance projects from the Institutional Development Fund (IDF).
[2] Private sector development.
[3] Macro-economic reform and building credit.
[4] Balance of payment.
[5] Subject to confidential side letter from government.
[6] Subject to agreement on macro-economic framework.

Source: Compiled by staff of the U.S. International Trade Commission from World Bank data.

Figure 5-2
The twenty countries of the Common Market for Eastern and Southern Africa



Source: Compiled by staff of the U.S. International Trade Commission from PC Globe.

Recent Developments

The COMESA's stated objectives are to:[1]

- attain sustainable growth and development of the member States by promoting a more balanced and harmonious development of its production and marketing structure;
- promote joint development in all fields of economic activity and the joint adoption of macro-economic policies and programs to raise the standard of living of its peoples and to foster closer relations among its member States;
- cooperate in the creation of an enabling environment for foreign, cross-border, and domestic investment, including the joint promotion of research and the adaptation of science and technology for development;
- cooperate in the promotion of peace, security, and stability among the member States in order to enhance economic development in the region;

[1] Ibid.

- cooperate in strengthening the relations between the Common Market and the rest of the world and the adoption of common positions in international fora; and
- contribute towards the establishment, progress, and the realization of the objectives of the African Economic Community.

Private sector involvement and market-led integration are two of the pivotal differences between the PTA and COMESA.[22] The PTA was conceptualized and designed as an intergovernmental organization with emphasis on government-to-government cooperation.[23] COMESA, on the other hand, is designed to provide a more conducive environment for business, as shown in table 5-3.

Table 5-3
Common Market for Eastern and Southern Africa (COMESA): Objectives and progress in 1995-96

Objective	Rationale	Progress or implementation
Private Sector Development	Increase investment and production with greater efficiency and positive macroeconomic impacts.	Enterprise development and assistance. Publication of industry and trade documents. Computerized customs data management system installed in all countries.
Production and Market-led Integration	High quality goods are not produced in the region. Emphasis on value added goods. COMESA is a single "domestic market" for investment purposes.	Preferential Trade Area clearing house remains intact from the former agreement. Significant tariff reduction. Elimination of various intraCOMESA trade barriers, including import licensing, quotas, road blocks and foreign exchange allocations. Study on the establishment of a common external tariff.
Multi-speed Development with Accelerated Implementation of Agreements	By waiting for the slowest member of the group, objectives were difficult to meet. Consensus decision making slowed development down for the faster moving members.	The formation of the Permanent Tripartite Commission for East African Cooperation.
Principle of Enforceability and Sanctions	Obligates members to comply with the agreement or risk suspension or expulsion from the group.	A court/ruling body is being put together.

Source: Compiled by staff of the U.S. International Trade Commission from information from the COMESA Secretariat.

[22] Ibid.
[23] Ibid.

According to COMESA, intraCOMESA trade is growing at an annual rate of 10.1 percent.[24] The stimulation of trade has come about in part through the reduction of import tariffs by member states as approximately 14 of the 20 member states have lowered tariffs by 60 to 70 percent since 1989.[25] The establishment of a common external tariff is under consideration by COMESA. A study about the effects of implementing a common external tariff has been completed by COMESA and will be released to the public in October 1996.

Increasing concerns over the duplicative efforts of COMESA and SADC (discussed below) led to a joint SADC/COMESA summit in early August 1996 to discuss the activities of both groups.[26] Ten countries with membership in COMESA are also members of SADC, as shown in table 5-1.[27] Following this summit, COMESA released a statement indicating that the two organizations would continue separately.[28] However, a joint meeting is scheduled for November 1996 in Mauritius to discuss further the possibility of a merger or potential areas of cooperation.[29]

US-COMESA Trade Flows

COMESA accounted for $1.0 billion, or 19.1 percent, of total U.S. exports to Sub-Saharan Africa in 1995, which is virtually unchanged from its share of 19.7 percent in 1991 (table 5-4). Of total U.S. imports from Sub-Saharan Africa, COMESA accounted for $3.1 billion, or 24.0 percent, in 1995, up from 20.6 percent in 1991.

The major sectors for U.S. exports to COMESA in 1995 included transportation equipment, agricultural products, machinery, and electronic products. The major sectors for U. S. imports from COMESA were energy-related products and agricultural products, which accounted for 74 percent and 9 percent, respectively, of such imports in 1995. Growth in U.S. imports from COMESA during 1991-95 was largely due to imports of energy-related products, which increased from $1.8 billion in 1991 to $2.3 billion in 1995 and are primarily from Angola.

Southern African Customs Union

SACU provides a common pool of customs, excise, and sales duties according to the relative volume of trade and production in each member country. The original SACU treaty extends back to 1910 as part of the Act of the Union of South Africa. Original parties to the treaty included South Africa, Botswana, Lesotho, and Swaziland. In 1990, Namibia formally acceded to the agreement with no major modifications to the revenue-

[24] Kayayam Nysebgwa, "SAP Affecting Intra-COMESA Trade," Africa News Service (via Comtex), Apr. 14, 1996, found at http://www.elibrary.com.

[25] Ibid.

[26] Mildred Mulenga, "COMESA urged to Strive in Economic Integration," Africa News Service (via Comtex), Apr. 18, 1996, found at http://www.elibrary.com.

[27] South Africa and Botswana are not members of COMESA. While COMESA is open to membership of South Africa and Botswana it remains unclear if South Africa will join the group, especially in light of the discussions concerning a free trade agreement between South Africa and the EU. Facsimile supplied by the Secretariat of COMESA.

[28] Musengawa Kayaya, "Africa in Brief," Africa News Service (via Comtex), Aug. 7, 1996, found at http://www.elibrary.com.

[29] Ibid.

Table 5-4
Common Market for Eastern and Southern Africa[1]: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by major commodity sectors, 1991-1995[2]

(Million dollars)

Item	1991	1992	1993	1994	1995
U.S. exports of domestic merchandise:					
Agricultural products	188.5	376.0	243.7	345.7	260.2
Forest products	8.4	8.4	12.2	18.0	29.4
Chemicals & related products	56.2	49.8	60.9	55.9	81.2
Energy-related products	5.8	4.1	8.0	6.1	4.3
Textiles & apparel	19.3	37.7	29.8	30.5	32.4
Footwear	1.6	0.3	0.4	0.9	1.4
Minerals & metals	20.1	11.4	15.8	18.1	47.7
Machinery	87.6	78.3	90.1	95.9	123.2
Transportation equipment	418.0	401.7	198.7	251.3	282.8
Electronic products	68.0	69.0	81.9	96.8	99.8
Miscellaneous manufactures	8.8	4.4	9.4	18.3	5.3
Special provisions	50.1	56.2	47.1	64.7	44.5
Total	932.3	1,097.2	798.0	1,002.1	1,012.2
U.S. imports for consumption:					
Agricultural products	287.8	290.8	329.9	361.0	276.0
Forest products	3.7	4.9	5.5	7.6	15.6
Chemicals & related products	10.5	4.3	2.3	3.7	13.1
Energy-related products	1,808.7	2,299.6	2,110.0	2,085.2	2,296.5
Textiles & apparel	156.3	200.2	280.6	331.6	332.5
Footwear	0.6	0.2	0.9	0.5	0.1
Minerals & metals	108.3	161.0	96.3	124.1	106.4
Machinery	1.7	1.1	2.2	2.1	2.7
Transportation equipment	1.7	1.0	2.1	1.1	1.2
Electronic products	7.6	14.7	13.5	12.7	20.6
Miscellaneous manufactures	6.2	8.6	18.9	18.1	26.3
Special provisions	19.4	22.7	16.9	18.3	18.3
Total	2,412.6	3,008.0	2,879.1	2,966.1	3,109.2
U.S. merchandise trade balance:					
Agricultural products	-99.3	85.2	-86.2	-15.3	-15.8
Forest products	4.7	3.5	6.7	10.3	13.8
Chemicals & related products	45.7	45.5	58.6	52.2	68.1
Energy-related products	-1,802.8	2,295.5	-2,102.0	-2,079.1	-2,292.2
Textiles & apparel	-137.1	-162.5	-250.8	-301.1	-300.0
Footwear	1.0	0.1	-0.5	0.3	1.4
Minerals & metals	-88.3	-149.6	-80.5	-106.0	-58.7
Machinery	85.9	77.1	87.9	93.8	120.5
Transportation equipment	416.3	400.7	196.6	250.2	281.6
Electronic products	60.4	54.3	68.4	84.1	79.2
Miscellaneous manufactures	2.6	-4.2	-9.5	0.2	-21.0
Special provisions	30.7	34.5	30.2	46.4	26.2
Total	-1,480.2	-1,910.9	-2,081.1	-1,954.1	-2,097.1

[1] Includes Angola, Burundi, Comoros, Eritrea, Ethiopia, Kenya, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Rwanda, Somalia, Sudan, Swaziland, Tanzania, Uganda, Zambia, and Zimbabwe.

[2] Import values are based on customs value; export values are based on f.a.s. value.

Note.--Because of rounding, figures may not add to the totals shown.

Source: Compiled by staff of the U.S. International Trade Commission from the data supplied by the U.S. Department of Commerce.

sharing formula undertaken at that time.[30] Figure 5-3 shows the members of SACU. Major modifications had occurred in 1969 as a result of the independence gained by the BLS[31] countries during the 1960s.

The original treaty of 1910 allocated fixed proportions of the tariff revenue according to pre-SACU trade patterns between the member countries. In 1969, the BLS countries' receipts were greatly increased because of changes in the allocation formulas incorporating an enhancement factor. According to the BLS countries, the change in the revenue-sharing formula was necessary because membership in SACU adversely impacted their economies in four ways: increased prices due to South Africa's tariff protection; increased prices due to South Africa's quantitative import restrictions; loss of fiscal discretion; and polarization of economic development, with concentration in South Africa to the detriment of the BLNS countries.

Renegotiation of the SACU Treaty

Negotiation to amend the treaty began in early 1995, with no agreement to date in place. Three factors have contributed to the lack of an agreement. First, the region has undergone significant changes in the past three years owing to the democratization of South Africa. Second, other regional integration schemes, such as COMESA and SADC, are gaining strength and momentum in overlapping programs and country memberships. Third, criticisms of the revenue-sharing formula in the agreement by member and neighboring countries are being expressed. The economies of the SACU member countries are divergent, as shown in table 5-5.

In principle, all member countries have agreed that the revised revenue-sharing formula should be based on the cost raising effects of common external tariffs on internal trade flows.[32] This could effectively compensate the BLNS for premium prices the South African industry is able to charge due to tariff protection.[33] The determination of what products will be included in the formula is yet to be completed and remains a point of contention. While the issue of the formula appears to be resolved, the issue of the revenues taken in by external tariffs remains under discussion and contentious.[34] South Africa does not feel obligated to pay out, from the SACU revenue pool, more to the BLNS countries than is generated from the same countries. The formula, as currently agreed upon, does just that.

The BLNS countries, Botswana in particular, point out that exports from South Africa to the BLNS countries reap high profits and duties and, therefore, some of this revenue should be redistributed. Swaziland objects to strictly basing revenues on trade flows because past agreements have allowed for the BLNS countries to share the residual and unclaimed revenues by South Africa.[35] A significant percentage of the total budget of Lesotho and Swaziland is from SACU revenues. Namibia's Deputy Minister for Industry and Trade stated in March that SACU favors South Africa and prevents member countries from making independent trades

[30] Botswana Confederation of Commerce, Industry and Manpower (BOCCIM), *BOCCIM's Recommendations to the Government of Botswana for the Renegotiation of the Southern African Customs Union Agreement*, Feb.15, 1995.

[31] BLS refers to the countries of Botswana, Lesotho and Swaziland and BLNS refers to Botswana, Lesotho, Namibia and, Swaziland. This is the standard way of noting the countries in the literature available on SACU.

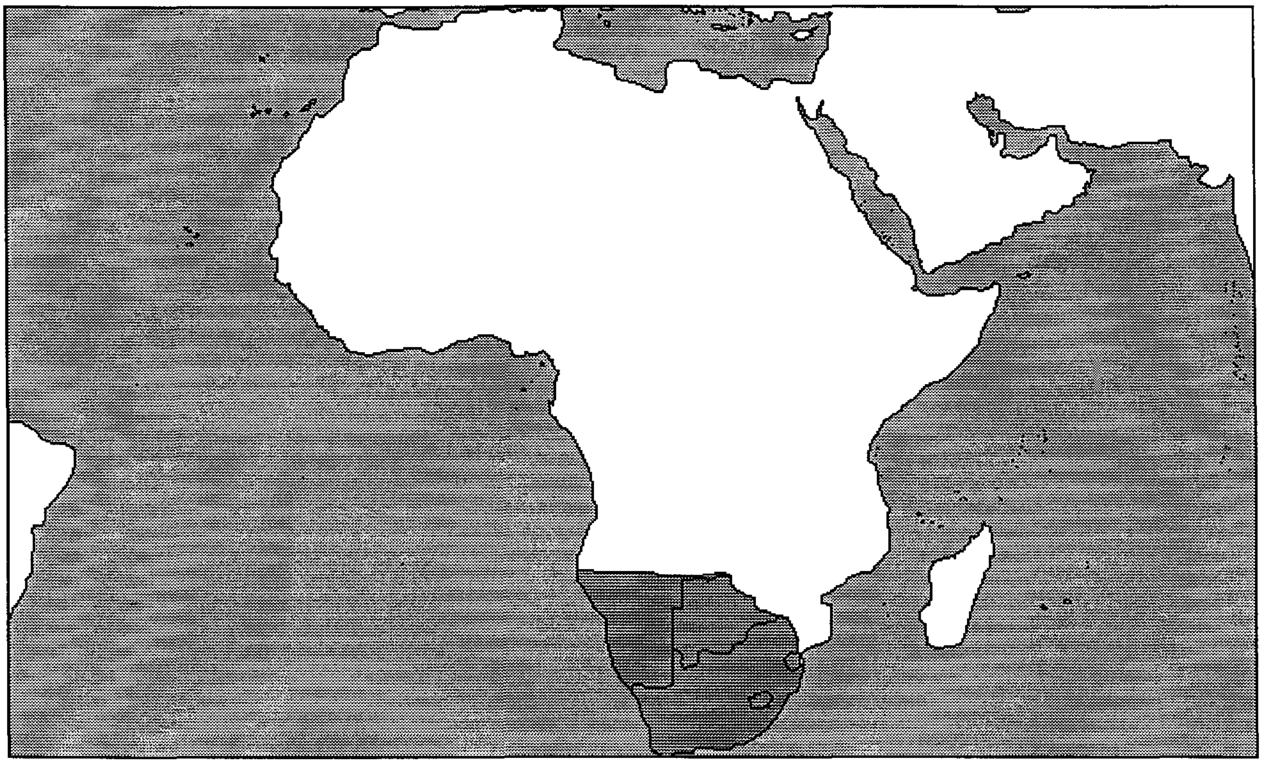
[32] U.S. Department of State cable, "SACU Break through and SADC Hurdles," message reference No. 00984, prepared by U.S. Embassy, Maseru, Lesotho, July 1996.

[33] U.S. Department of State cable, "SACU Renegotiations Seen From Gabarone," message reference No. 002610, prepared by U.S. Embassy, Gaborone, July 1996.

[34] Ibid.

[35] U. S. Department of State cable, "SACU Break through and SADC Hurdles," message reference No. 00984, prepared by U.S. Embassy, Maseru, June 1996.

Figure 5-3
The five countries of the Southern African Customs Union



Source: Compiled by staff of the U.S. International Trade Commission from PC Globe.

Table 5-5
Southern African Customs Union: Basic indicators of member countries, 1994

Country	Population (*millions*)	Area (*thousands of square km*)	GNP (*per capita, US dollars*)	Average annual growth of GNP 1990-94 (*percent*)	Index of GNP per capita (*South Africa=100*)	Life expectancy (*years*)
South Africa	41.60	1,221	3,010	1	100	63
Botswana	1.40	567	2,800	7	93	65
Lesotho	2.00	20	700	5	23	61
Namibia	1.50	823	2,030	34	67	59
Swaziland	0.90	17	1,160	-10	38	58

Note.--GNP refers to gross national product.
Source: Compiled by the staff of the U. S. International Trade Commission from World Bank data.

with countries outside of SACU. This charge is based on the fact that the accord forces the BLNS countries to rely on South African raw materials and South African trade routes.[36]

U.S.- SACU Trade Flows

SACU accounted for $2.8 billion, or 52.1 percent, of total U.S. exports to Sub-Saharan Africa in 1995, compared to 45.1 percent in 1991 (table 5-6). Of total U.S. imports from Sub-Saharan Africa, SACU countries accounted for $2.3 billion, or 18.0 percent, in 1995, up from 15.7 percent in 1991.

U.S. exports to SACU vary across a large number of sectors, primarily because of South Africa's dominant position in U.S. trade with Sub-Saharan Africa. In 1995, South Africa accounted for 98 percent of U.S. exports to SACU and 95 percent of U.S. imports. U.S. imports from SACU are highly concentrated in minerals and metals, of which South Africa is the United States' largest supplier in the region.

Southern African Development Community

The Southern African Development Coordination Conference gave rise to SADC in 1992 with original members Angola, Botswana, Lesotho, Malawi, Mozambique, Namibia, Swaziland, Tanzania, Zambia, and Zimbabwe. South Africa joined SADC in 1994 and Mauritius became the 12th member in 1995. Figure 5-4 provides a map of the SADC countries. SADC is working toward the creation of a 130-million person southern African common market by the year 2000. SADC's objectives include free trade, free movement of people, a single currency, democracy, and respect for human rights.[37]

Each SADC country assumes the lead responsibility for an area of growth and development.[38] These areas, and the responsible countries, are shown in table 5-7.

Progress on the SADC Trade Protocol

SADC's focus is primarily on trade reform within the southern African region. On August 24, 1996, a trade protocol providing for a free trade agreement to be phased in over the next 8 years was signed by the members of SADC.[39] Details of the agreement were not included in the protocol but are to be worked out over the next 6 months. Because all members of SADC are members of the World Trade Organization, each is bound to reduce tariffs and to eliminate nontariff barriers, including quantitative restrictions on imports.[40] The five members of SACU may be on the "fast track" because, inherent to the SACU Treaty is a free-trade area.[41]

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[36] British Broadcast Service summary of World Broadcasts, Mar. 11, 1996, "Namibia threatens to Withdraw from Regional Customs Union," Internet Dialogue, NEXUS/LEXUS.

[37] Southern African Development Community, profile information, found at http://www.kent.edu/bus_coll.www/sabos/intro.htm.

[38] *Africa South of the Sahara 1996* (London: Europa Publications, 1996), pp. 112-113.

[39] Lionel Williams, "South Africa Trade-- Southern Africa Agrees on Establishment of Free Trade Area", Africa News Service (Comtex, Scientific Corporation), News Edge/LAN, Aug. 9, 1996.

[40] Will Martin and L. Alan Winters, eds., *The Uruguay Round and the Developing Economies*, World Bank Discussion Paper No. 307 (Washington, DC: The World Bank, 1995), p 305.

[41] David Evans, "Trade Policy Strategies for Southern Africa: Building Trade Policy Capabilities," Discussion draft, Commonwealth Secretariat, London, England, Apr. 1996.

Table 5-6
Southern African Customs Union[1]: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by major commodity sectors, 1991-1995[2]

(Million dollars)

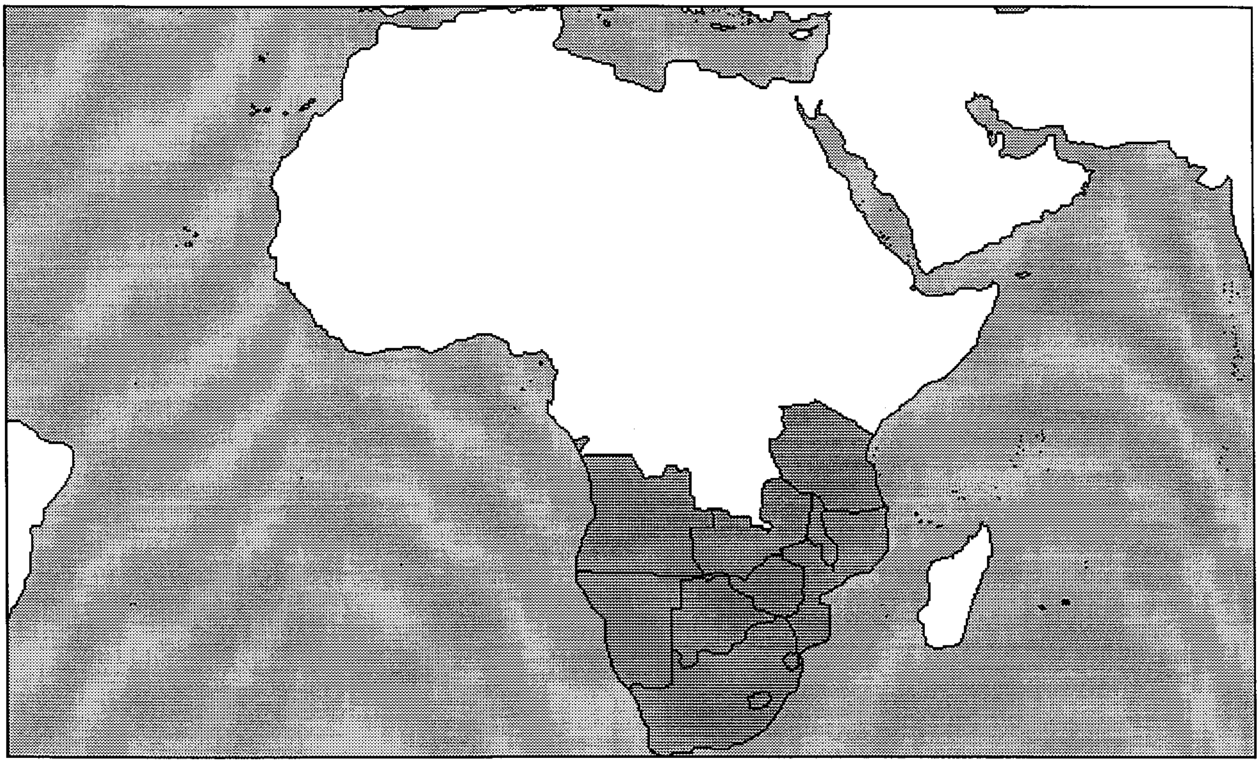
Item	1991	1992	1993	1994	1995
U.S. exports of domestic merchandise:					
Agricultural products	86.1	479.7	263.2	165.0	290.2
Forest products	124.9	126.1	134.1	129.6	149.1
Chemicals & related products	315.4	304.1	277.9	327.0	442.3
Energy-related products	75.0	77.8	70.9	91.7	107.2
Textiles & apparel	43.1	41.8	41.7	42.4	42.7
Footwear	1.3	2.1	3.3	6.5	4.4
Minerals & metals	72.6	92.7	66.2	83.5	101.0
Machinery	261.5	286.4	268.5	318.0	368.8
Transportation equipment	644.9	518.8	502.8	345.7	522.3
Electronic products	375.9	387.7	431.2	486.0	540.3
Miscellaneous manufactures	26.2	25.5	23.3	43.9	38.2
Special provisions	104.6	127.1	111.8	122.8	157.3
Total	2,131.4	2,470.0	2,195.0	2,162.0	2,763.9
U.S. imports for consumption:					
Agricultural products	36.4	87.3	113.2	142.9	149.4
Forest products	58.7	56.8	50.5	55.5	70.1
Chemicals & related products	53.3	64.6	73.4	93.1	118.0
Energy-related products	35.1	65.2	41.6	39.6	37.8
Textiles & apparel	36.5	83.3	102.5	141.8	155.8
Footwear	0.4	0.6	1.5	2.5	0.7
Minerals & metals	1,522.0	1,402.2	1,441.1	1,544.8	1,604.3
Machinery	33.5	31.1	33.3	37.2	49.4
Transportation equipment	15.8	19.6	26.2	31.7	52.3
Electronic products	1.8	3.4	4.3	9.7	12.0
Miscellaneous manufactures	5.6	5.9	9.6	13.5	17.4
Special provisions	34.0	35.9	61.6	51.7	67.1
Total	1,833.1	1,856.0	1,958.9	2,164.1	2,334.3
U.S. merchandise trade balance:					
Agricultural products	49.7	392.4	150.1	22.0	140.9
Forest products	66.2	69.3	83.5	74.0	79.0
Chemicals & related products	262.1	239.5	204.5	233.8	324.3
Energy-related products	39.9	12.6	29.4	52.1	69.4
Textiles & apparel	6.6	-41.5	-60.9	-99.4	-113.1
Footwear	1.0	1.5	1.8	4.0	3.7
Minerals & metals	-1,449.5	-1,309.5	-1,375.0	-1,461.3	-1,503.3
Machinery	228.0	255.4	235.3	280.8	319.4
Transportation equipment	629.1	499.2	476.6	314.0	470.0
Electronic products	374.1	384.3	426.9	476.3	528.3
Miscellaneous manufactures	20.5	19.5	13.7	30.4	20.8
Special provisions	70.6	91.3	50.2	71.2	90.2
Total	298.2	614.0	236.2	-2.1	429.6

[1] Includes Botswana, Lesotho, Namibia, South Africa, and Swaziland.
[2] Import values are based on customs value; export values are based on f.a.s. value.

Note.--Because of rounding, figures may not add to the totals shown.

Source: Compiled by staff of the U.S. International Trade Commission from data supplied by the U.S. Department of Commerce.

Figure 5-4
The twelve countries of the Southern African Development Community



Source: Compiled by staff of the U.S. International Trade Commission from PC Globe.

The additional "fast track" group is comprised of Malawi, Mauritius, Tanzania, Zambia, and Zimbabwe with each holding dual membership within SADC and COMESA and also participating in the CBI.[42] COMESA is committed to the establishment of a free trade area by the year 2000, and countries participating in the CBI are committed to significant reductions in tariff and nontariff barriers by 1998. Table 5-8 shows the SADC tariff status, by country.

Additional protocols on transportation, communication and meteorology, energy, and combating illicit drug trafficking were signed by SADC members on August 28, 1996. Projects in all sectors continue to enhance development efforts in the region and support the protocols. Table 5-9 shows the number and types of projects by sector and the funding organization.

[42] Namibia and Swaziland are also participants in the CBI, but because they are members of SACU they are unable to reciprocate tariff reductions.

Table 5-7
Southern African Development Community: Sectoral responsibility, by country

Member	Sectoral responsibility
Angola	Energy
Botswana	Agricultural research, livestock production and animal disease control
Lesotho	Tourism, environment and land management
Malawi	Inland fisheries, forestry, and wildlife
Mauritius	Assignment has not yet been made
Mozambique	Culture and information, transport and communications
Namibia	Marine fisheries and resources
South Africa	Finance and investment
Swaziland	Human resources development
Tanzania	Industry and trade
Zambia	Minining, employment, and labor
Zimbabwe	Food, agriculture, and natural resources

Source: Internet URL http://052.iafrica.com/mbendi/ORSADC.htm.

U. S.-SADC Trade Flows

SADC accounted for $3.3 billion, or 63.0 percent, of total U.S. exports to Sub-Saharan Africa in 1995, down from 55.0 percent in 1991 (table 5-10). Of total U.S. imports from Sub-Saharan Africa, SADC countries accounted for $5.1 billion, or 39.3 percent in 1995, up from 33.8 percent in 1991.

U.S. exports to SADC, similar to exports to SACU, are diversified across sectors, largely due to South Africa's membership in the organization. In 1995, South Africa accounted for 81 percent of U.S. exports to SADC countries. As shown in table 5-10, U.S. exports to SADC increased steadily during 1991-95, with transportation equipment, electronic products, chemicals and related products, and machinery being the largest export sectors. U.S. imports from SADC are largely concentrated in the energy-related and minerals and metals sectors, of which Angola (energy-related products) and South Africa (minerals and metals) are major import sources. Angola was the major SADC import supplier to the United States in 1995, accounting for 45 percent of such imports, with South Africa accounting for 43 percent.

Table 5-8
Southern African Development Community: Tariff status, by country

Country/group	Aspect of trade barriers/reforms and current status	Commodities with hghest duties according to HS chapters
Angola	• Highest tariff range use is 50% - 80% • Products in highest group use is 273 • Total tariff range: 0 - 80% • Six categories in highest range • Largest number of products subject to 10% duty • Average import tariff use is 30% • Restructuring process in place after years of civil strife. Domestic reform is occurring at a slow pace and is looking to follow CBI guidelines.	II, IV, V, VI, VIII, X, XI, XII, XIII, XIV, XV, XV, XVIII, XIX, XX
Malawi	• Highest tariff range use is 35% - 40% • Products in highest group use is 1,615 • Total tariff range: 0 - 35% • Nine import tariff rates. • Most common rates are set at 20%, 25% and 35%. Sixty percent of all products fall under one of these categories. • Average import tariff use is 30% • Tariff rates have been reduced to the 35% range from a high of 70%. • CBI country tariff reduction - 70% • Import liberalized except for health, safety, and national security. • Exports liberalized, except those covered by food security.	I, II, III, IV, VI, VII, VIII, IX, X, XI, XII, XIII, XIV, XV, XVI, XVII, XVIII, XIX, XX
Mauritius	• Highest tariff range use is 50% - 160% • Products in highest group use is 1,155 • Total tariff range: 0 - 100% • 700 products at 70% - 100% • 3,000 product at 0, 15%, or 20%. • Average import tariff use is 30% • Tariff rates have been traditionally very high with a program of reducing tariffs put into place in 1994. • CBI country tariff reduction - 70% • Imports fully liberalized except for health, safety and national security. • Exports liberalized.	IV, VI, VII, VIII, X, XI, XII, XV, XVI, XVII, XVIII, XIX, XX
Mozambique	• Highest tariff range use is 35% • Products in highest group use is 1,089 • Total tariff range: 0 - 35% • Six categories in highest range • Largest number of products subject to 10%, 15%, 25% and 35% duty. • Exemptions are significant. Up to 60% of duty that would otherwise have been collected are determined to be exempt. • Average import tariff use is 30%. • Reforms are under various stages of implementation.	I, II, IV, VI, VII, IX, X, XI, XIII, XIV, XV, XVI, XVII, XVIII, XIX, XX

Table continues on next page.

Table 5-8--Continued
Southern African Development Community: Tariff status, by country

Country/group	Aspect of trade barriers/reforms and current status	Commodities with hghest duties according to HS chapters
SACU (South Africa, Namibia, Botswana, Swaziland and Lesotho)	• Highest tariff range use is 32% - 100% • Number of products in highest group use is 67 • Total tariff range 0 - 100% • Largest number of products fall under 0, 10%, 15% and 30% rates • A number of industries are very heavily protected in South Africa	VI, VII, VIII,, XII, XIII, XV, XVI, XVII, XVIII, XX
Tanzania	• Highest range use is 40% • Number of products in highest group use is 1,253 • Total tariff range 5% - 40% • Relatively low import tariffs • Most products taxed at 20%, 30%, 40% -- accounting for 80% of total number of products • CBI country tariff reduction - 70% in theory, but 60% in actuality • Exports liberalized • Imports liberalized except for health and national security reasons	I, II, III, IV,VI, VIII, IX, X, XI, XII, XIV, XVI, XX
Zambia	• Highest tariff range - 25% • Number of products in highest group is 28 • Total tariff range between 0 - 25% • CBI country tariff reduction - 60% • Imports liberalized except for health and national security reasons	V, X, XI, XIII, XV
Zimbabwe	• Highest tariff range use is 35% - 100% • Number of products in highest group - 215 • Total tariff range 0 - 100% • Most products at relatively low levels (10 - 30%) • Most goods no higher than 35%, two grouping at 60% • Tariff reform carried out so a 25% maximum tariff rate will be achieved. CBI recommendation to be incorporated. CBI tariff preferences of 60%. • Quotas on certain products.	IV, V, VI, VII, VIII, IX, X, XI, XIII, XIV, XV, XVI, XVII, XX

Source: Adapted from Marina Mayer and Harry Zarenda, *Study on SADC Trade Protocol and The Establishment of a SADC Free Trade Area* (Durban, South Africa, University of Natal: June 1996).

Table 5-9
Southern African Development Community: 1995 projects and funding, by sector, by $mil

Sector	Number of projects	Estimated total cost US	Funding secured	Funding gap	Donor organizations and countries[1]
Culture and information	7	$15.90	$10.95	$4.95	SADC, EEC, Norway, Nordics[2]
Energy (total):	65	861.91	624.86	237.05	SADC, EEC,OPEC, CIDA, Angola, Norway, Belgium, Brazil, Canada, Sweden, France, Portugal, UK, Zambia, Botswana, Holland,
Coordination	5	34.44	32.44	2.00	
Petroleum	6	65.70	.44	65.26	
Coal	1	.11	.00	.11	
Electricity	35	723.63	575.24	147.79	
New and renewable	6	3.48	1.58	1.90	
Wood fuel	8	20.99	4.14	16.85	
Conservation	4	13.57	11.01	2.55	
Agriculture reseach and training	14	126.92	79.91	47.01	SADC,EEC, Canada, USAID/ISA, Germany,Nordics, UK
Inland fisheries, forestry and wildlife	35	258.45	148.33	110.12	SADC, UNEP, GEF, Norway, Iceland Sweden, Nordics, Tanzania, USA, Lesotho
Food security	11	71.67	21.75	49.92	SADC, EEC, Australia,Zimbabwe, Denmark, Netherlands, Germany
Livestock production and animal disease control	14	110.99	78.08	31.93	SADC, UNDP, USAID, EEC, Angola, Botswana, Denmark, Netherlands, Belgium, Tanzania, Sweden
Enviroment and land management	10	49.13	27.51	21.62	SADC, UNEP, Sweden, Nordic, USA, Lesotho
Marine fisheries and resources	6	6.96	.72	6.24	EU, Iceland
Industry and trade	12	13.75	2.75	11.00	Norway[3]
Human resources development	18	44.76	16.27	28.49	EC, Belgium, Canada, Russia, Germany, Australia, India
Mining	28	30.12	14.34	15.78	SADC, CFTC, EU, Australia, France, Germany
Tourism	11	5.31	2.46	2.86	SADC, COMSEC, CBI, UNDP, ICEIDA, EU,Netherlands, Canada, Sweden

See footnotes at end of table.

Table 5-9--Continued
Southern African Development Community: 1995 projects and funding, by sector, by $mil

Sector	Number of projects	Estimated total cost US	Funding secured	Funding gap	Donor organizations and countries[1]
Transport and communications	194	$6,474.40	$2,991.70	$3,482.70	SADC, UNDP, SATCC, IDA/IBRD, ITU, EU, AfDB, BADEA, OPEC, Nordics, USA, Australia, Sweden, Finland, Angola, Namibia, Canada, Belgium, Gemany, Mozambique, Malawi, Denmark, Lesotho, Kuwait, Swaziland, UK, Italy, Zimbabwe, Italy, Sweden, Portugal
Finance and investment	1[4]	([5])	([5])	([5])	SADC

[1] Southern African Development Community (SADC); European Economic Community (EEC); Consortium of Scandinavian countries (Nordics); Organization of Petroleum Exporting countries (OPEC); Canadian International Development Agency (CIDA); U.S. Agency for International Development (USAID); Initiative for Southern Africa (ISA); United Nations Environmental Program (UNEP); European Union (EU); Global Environment Facility (GEF); United Nations Development Program (UNDP); Commonwealth Fund for Technical Cooperation (CFTC); Commonwealth Secretariat (COMSEC); Confederation of British Industries (CBI); Icelandic International Development Assistance (ICEIDA); Southern Africa Transport and Communications Commission (SATCC); International Development Agency /International Bank for Reconstruction and Development (IDA/IBRD); International Telecommunications Union (ITU); African Development Bank (AfDB); Arab Bank for Economic Development in Africa (BADEA).

[2] Nordics refers to the consortium of Scandinavian countries.

[3] Incomplete information available.

[4] The Finance and Investment sector is new to SADC as of August 1995. Prior to then, responsibilities were held by the SADC Secretariat and the Sector of Trade and Industry. Currently, research is being conducted to enable projects and programs to be designed and funded.

[5] Not available.

Source: Compiled by staff of the U.S. International Trade Commission from nine SADC annual reports presented by members at Johannesburg, Feb. 1, 1996.

Table 5-10
Southern African Development Community[1]: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by major commodity sectors, 1991-1995[2]

(Million dollars)

Item	1991	1992	1993	1994	1995
U.S. exports of domestic merchandise:					
Agricultural products	136.6	696.4	343.7	247.6	384.2
Forest products	128.4	130.5	142.9	144.0	170.9
Chemicals & related products	344.5	329.7	300.8	346.3	473.9
Energy-related products	77.2	81.4	76.3	93.9	108.9
Textiles & apparel	56.4	71.1	62.1	64.4	65.6
Footwear	2.9	2.4	3.7	7.2	5.4
Minerals & metals	89.6	102.2	78.7	98.9	143.7
Machinery	308.8	332.1	320.2	377.3	442.5
Transportation equipment	878.1	689.7	627.1	489.1	724.2
Electronic products	416.5	430.3	474.5	536.4	604.4
Miscellaneous manufactures	29.1	29.1	28.7	57.6	42.0
Special provisions	124.6	155.3	131.6	146.1	178.3
Total	2,592.8	3,050.1	2,590.3	2,608.9	3,344.1
U.S. imports for consumption:					
Agricultural products	150.0	225.0	296.1	272.2	242.2
Forest products	59.1	57.7	51.5	58.0	73.4
Chemicals & related products	54.5	66.7	73.7	93.6	126.2
Energy-related products	1,809.3	2,329.6	2,134.3	2,108.8	2,328.5
Textiles & apparel	153.3	216.1	291.6	352.5	369.1
Footwear	0.5	0.7	1.9	2.7	0.8
Minerals & metals	1,622.6	1,538.3	1,524.6	1,647.8	1,700.4
Machinery	34.3	31.5	34.2	38.9	51.7
Transportation equipment	17.0	20.3	27.7	32.5	53.3
Electronic products	8.5	13.3	16.2	20.7	28.0
Miscellaneous manufactures	9.9	12.9	24.3	26.4	37.8
Special provisions	39.4	43.4	67.3	59.5	75.6
Total	3,958.3	4,555.5	4,543.4	4,713.4	5,087.1
U.S. merchandise trade balance:					
Agricultural products	-13.4	471.4	47.6	-24.6	142.0
Forest products	69.3	72.7	91.4	86.1	97.5
Chemicals & related products	290.1	263.0	227.1	252.7	347.7
Energy-related products	-1,732.1	-2,248.2	-2,058.0	-2,014.9	-2,219.6
Textiles & apparel	-96.9	-145.0	-229.5	-288.1	-303.6
Footwear	2.4	1.7	1.7	4.5	4.6
Minerals & metals	-1,532.9	-1,436.1	-1,445.9	-1,548.8	-1,556.6
Machinery	274.5	300.6	286.0	338.4	390.8
Transportation equipment	861.1	669.4	599.4	456.6	670.9
Electronic products	407.9	417.1	458.3	515.7	576.3
Miscellaneous manufactures	19.2	16.2	4.4	31.2	4.2
Special provisions	85.3	111.9	64.3	86.6	102.7
Total	-1,365.5	-1,505.4	-1,953.1	-2,104.6	-1,743.1

[1] Angola, Botswana, Lesotho, Malawi, Mauritius, Mozambique, Namibia, Swaziland, South Africa, Tanzania, Zambia, and Zimbabwe.

[2] Import values are based on customs value; export values are based on f.a.s. value.

Note.--Because of rounding, figures may not add to the totals shown.

Source: Compiled by staff of the U.S. International Trade Commission from data supplied by the U.S. Department of Commerce.

West African Economic and Monetary Union

The WAEMU[43] was initiated by seven West African countries--Benin, Burkina Faso, Côte d'Ivoire,Mali, Niger, Senegal, and Togo--in 1994 (these countries are shown in figure 5-5). WAEMU was created to help stabilize the financial base of the these countries' economies following the devaluation of the CFA[44] in January 1994. WAEMU member countries are a subset of the 16-member Economic Community of West African States (ECOWAS), which is composed of Benin, Burkina, Cape Verde, Côte d'Ivoire, Gambia, Ghana, Guinea, Guinea-Bissau, Liberia, Mali, Mauritania, Niger, Nigeria, Senegal, Sierra Leone, and Togo. The West African Monetary Agency (WAMA) is the ECOWAS specialized agency charged with facilitating action for the Community's common currency by the year 2000.

Recent Developments

In August 1995, a protocol was enacted by the 16 members of ECOWAS outlining the functions of WAMA. The protocol was ratified in January 1996. One its primary functions will be to promote the use of member countries' national currencies in regional trade and other transactions, thus resulting in savings of foreign reserves. Harmonization of fiscal and monetary policies and structural adjustment programs for member countries were additional functions agreed to under the protocol.[45]

U.S.-WAEMU Trade Flows

U.S. exports to WAEMU countries are relatively small, accounting for $346.2 million, or 6.4 percent, of total U.S. exports to Sub-Saharan Africa in 1995, compared to 5.4 percent in 1991 (table 5-11). Of total U.S. imports from Sub-Saharan Africa, WAEMU countries accounted for $267.1 million, or 2.0 percent, in 1995, which is virtually unchanged from 2.2 percent in 1991.

The major sectors for U.S. exports include agricultural products, transportation, and chemicals and related products, with U.S. exports increasing in the latter two sectors by 186.1 percent and 85.6 percent during 1994-95. The major sector for U.S. imports from WAEMU is agricultural products, which accounted for 64.6 percent of such imports in 1995.

The Permanent Tripartite Commission of the East African Community

The PTC/EAC officially opened on March 14, 1996, in Arusha, Tanzania. The PTC/EAC is composed of Kenya, Uganda, and Tanzania, shown in figure 5-6, and represents a market of approximately 80 million people. The PTC/EAC previously existed between 1967 and 1977 and is working to rebuild strong economic ties.[46]

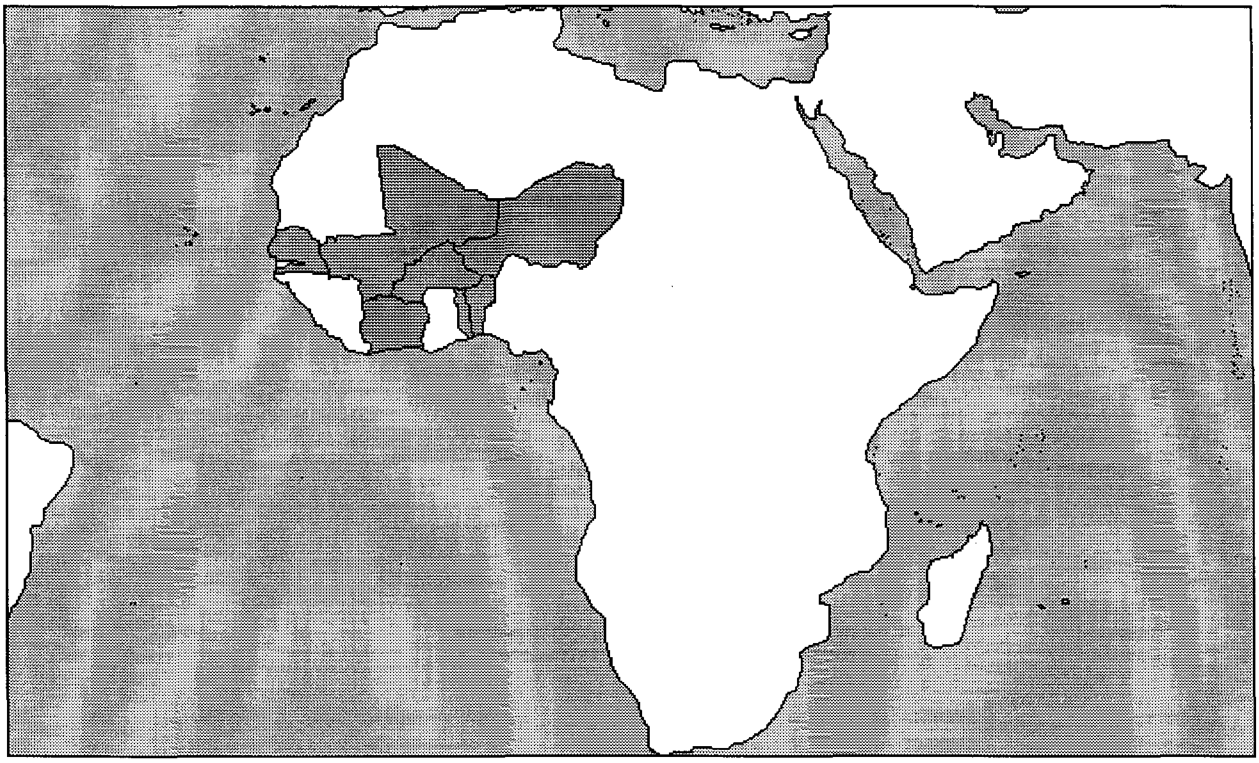
[43] Also, the Union Economic et Monitaire d'Afrique d'Ouest (UEMOA).

[44] USITC, *U.S. Africa Trade Flows and Effects of the Uruguay Round,* USITC publication 2938.

[45] Paul Ejime, "ECOWAS-integration Compare Defends Francophone Monetary Union Within ECOWAS," Africa News Service (via Comtex), July 27, 1996, found at http://www.elibrary.com.

[46] Rose Umoren, *Africa Finance,* Inter Press Service English New Wire, Mar. 9, 1996, found at http://www.elibrary.com.

Figure 5-5
The seven countries of the West African Monetary and Economic Union



Source: Compiled by staff of the U.S. International Trade Commission from PC Globe.

Table 5-11
West African Economic and Monetary Union[1]: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by major commodity sectors, 1991-1995[2]

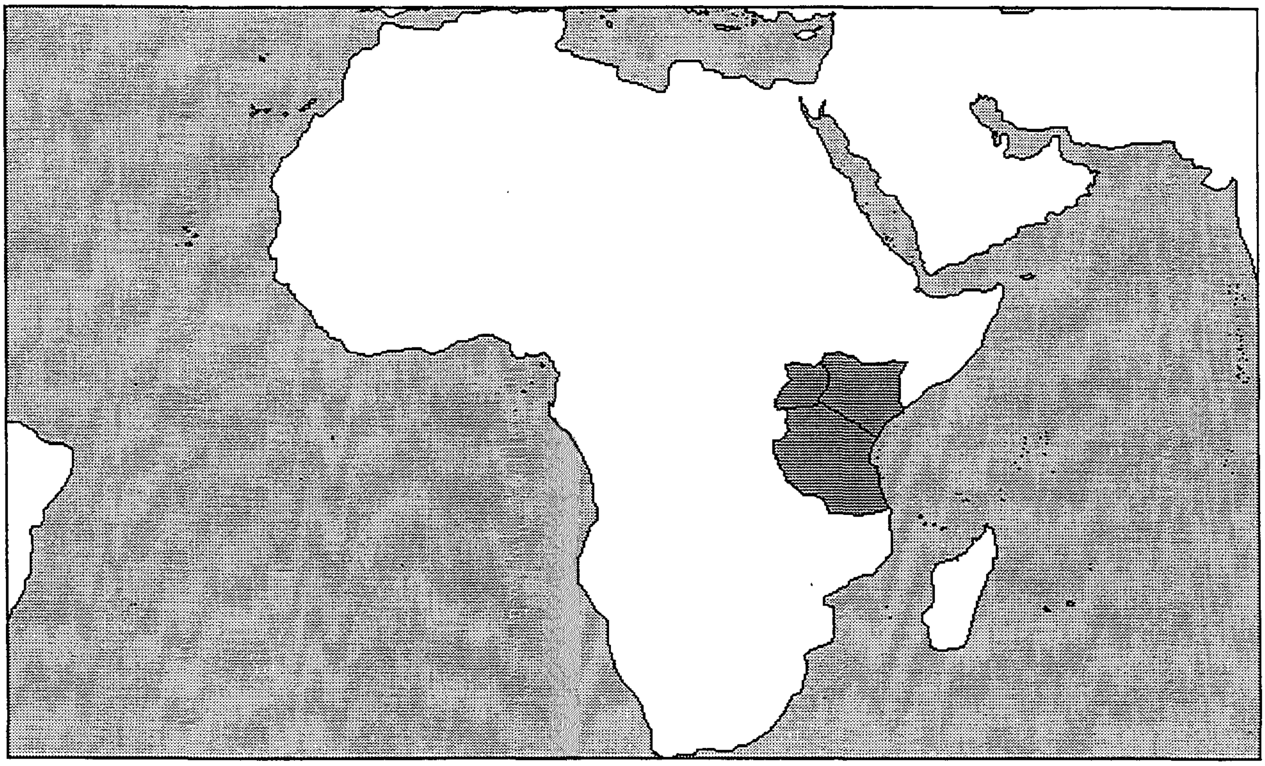
(Million dollars)

Item	1991	1992	1993	1994	1995
U.S. exports of domestic merchandise:					
Agricultural products	109.1	87.1	93.3	62.6	77.8
Forest products	8.1	8.8	7.8	8.6	24.9
Chemicals & related products	27.9	34.8	23.6	32.7	85.6
Energy-related products	5.2	2.0	2.2	1.8	3.2
Textiles & apparel	34.4	31.8	28.3	25.6	43.8
Footwear	0.7	1.4	0.9	0.7	0.9
Minerals & metals	1.3	1.4	5.8	4.2	6.7
Machinery	17.3	13.7	25.7	28.4	38.1
Transportation equipment	25.1	29.6	40.6	28.3	71.8
Electronic products	16.9	24.9	15.0	26.4	18.6
Miscellaneous manufactures	1.9	1.3	1.2	1.6	1.2
Special provisions	8.8	9.6	12.4	7.9	10.9
Total	256.6	246.2	256.8	228.7	346.2
U.S. imports for consumption:					
Agricultural products	166.8	141.6	131.1	146.5	172.7
Forest products	5.1	4.1	4.3	5.2	4.9
Chemicals & related products	7.7	7.6	8.1	9.5	15.5
Energy-related products	45.1	36.5	45.4	18.6	38.7
Textiles & apparel	3.8	6.1	8.5	5.9	4.6
Footwear	0.1	0.2	1.2	0.7	0.2
Minerals & metals	21.2	13.8	3.8	1.1	8.4
Machinery	2.0	0.4	0.6	0.6	0.8
Transportation equipment	0.4	0.0	0.3	0.3	0.1
Electronic products	2.4	1.7	2.0	2.9	13.5
Miscellaneous manufactures	2.9	3.3	2.3	21.9	3.1
Special provisions	3.4	3.2	4.9	6.3	4.6
Total	261.1	218.7	212.4	219.6	267.1
U.S. merchandise trade balance:					
Agricultural products	-57.6	-54.5	-37.8	-83.9	-94.9
Forest products	3.0	4.6	3.6	3.3	20.0
Chemicals & related products	20.1	27.1	15.5	23.1	36.4
Energy-related products	-39.9	-34.5	-43.2	-16.8	-35.5
Textiles & apparel	30.6	25.6	19.8	19.7	39.3
Footwear	0.6	1.2	-0.3	0.0	0.7
Minerals & metals	-19.9	-12.4	2.0	3.0	-1.7
Machinery	15.3	13.2	25.2	28.1	37.3
Transportation equipment	24.7	29.6	40.3	28.0	71.6
Electronic products	14.5	23.1	13.0	23.5	1.6
Miscellaneous manufactures	-1.0	-2.0	-1.1	-20.3	-1.9
Special provisions	5.4	6.4	7.5	1.6	6.3
Total	-4.4	27.5	44.4	9.0	79.1

[1] Includes Benin, Burkina, Côte d'Ivoire, Mali, Niger, Senegal, and Togo.
[2] Import values are based on customs value; export values are based on f.a.s. value.
Note.--Because of rounding, figures may not add to the totals shown.

Source: Compiled by staff of the U.S. International Trade Commission from data supplied by the U.S. Department of Commerce.

Figure 5-6
The three countries of the Permanent Tripartite Commission of the East African Community



Source: Compiled by staff of the U.S. International Trade Commission from PC Globe.

Since the formalization of the PTC/EAC, the currencies of the three countries have been made convertible. Program priorities include development of transport and communications, trade and industry, harmonization of fiscal and monetary policies, and security and immigration.[47] ■

[47] "EAC Chief Commends Economic Integration Efforts", Comtex, Scientific Corporation, News Edge/LAN, Aug. 9, 1996.

APPENDIX A
Letter from USTR

EXECUTIVE OFFICE OF THE PRESIDENT
OFFICE OF THE UNITED STATES TRADE REPRESENTATIVE
WASHINGTON, D.C. 20508

June 5, 1996

DOCKET NUMBER
1908
Office of the Secretary
Int'l Trade Commission

'96 JUN 11 P1:13

The Honorable Peter S. Watson
Chairman
U.S. International Trade Commission
500 E street, S.W.
Washington, D. C. 20436

Dear Chairman Watson:

In February 1996 the President, as directed by Section 134 of the Uruguay Round Agreements Act, submitted to the Congress the Administration's report on a Comprehensive Trade and Development Policy for the Countries of Africa. This report presents a comprehensive policy framework through which the United States will pursue its trade and development strategy with the 48 countries in Sub-Saharan Africa.

The Statement of Administrative Action (SAA) that was approved by the Congress with the Uruguay Round Agreements Act requires the President to direct the U.S. International Trade Commission to prepare an annual report in support of the Administration's Comprehensive Trade and Development Policy for the next four years. The SAA provides a broad outline of the information that should be provided to the President in this report. We received the Commission's first report in November 1995, as requested, to assist in the formulation of the policy framework.

To assist the President in implementing Section 134 of the Act, under authority delegated by the President, I request, pursuant to Section 332(g) of the Tariff Act of 1930, as amended, that the Commission provide the President annual reports for the next four years containing the following:

1. An update, for the latest year available, on U.S.-Africa trade and investment flows for both overall totals and for the following major sectors to the extent possible: agriculture, forest products, textiles and apparel, footwear, energy, chemicals, minerals and metals, machinery, transportation equipment, electronics technology, miscellaneous manufactures, and services. It is also requested that basic trade flow information be provided for U.S. trade with the following regional trade groups:
   --The Southern African Customs Union (SACU)
   --The Southern African Development Community (SADC)
   --Western African Economic and Monetary Union (WAEMU)
   --Common Market for Eastern and Southern Africa (COMESA)

2. An identification of major developments in the World Trade Organization and U.S. trade/ economic policy and commercial activities, which significantly affect U.S.-Africa trade and

investment flows by sector during the latest year. Similarly, to the extent possible, changing trade and economic activities within African countries that have a significant impact should be highlighted.

3. Progress in regional integration in Africa.

The Commission's investigation and report should be confined to the 48 countries of Sub-Saharan Africa. The Commission is requested to provide the next report not later than October 4, 1996, and to provide an update of the report annually thereafter through October 1999. A supplemental request will be sent in the event that it becomes necessary to change the scope of the requested report.

It is the expectation of this office that the Commission's report will be made available to the public in its entirety. Therefore, the report should not contain any confidential business or national security information. The Commission's assistance in this matter is greatly appreciated.

Sincerely,

Charlene Barshefsky
Acting U.S. Trade Representative

APPENDIX B
U.S. Trade Data and Country Information

Country Indicators - Sub-Saharan Africa

Country	Population mid-1994 *(millions)*	Area *(thousands of square km)*	GNP per capita: Dollars 1994	GNP per capita: Average annual percentage growth 1985-94	Life expectancy at birth 1993 *(years)*
Angola	10.7	1,247	...	-7.0	47
Benin	5.2	111	370	-0.8	48
Botswana	1.4	567	2,800	6.6	65
Burkina Faso	10.0	274	300	-0.1	47
Burundi	6.2	26	150	-0.7	50
Cameroon	12.9	465	680	-6.6	56
Cape Verde	0.4	4	910	1.8	65
Central African Republic	3.2	623	370	-2.9	49
Chad	6.2	1,259	190	0.9	48
Comoros	0.5	2	510	-1.4	56
Congo	2.4	342	640	-2.7	51
Côte d'Ivoire	13.8	318	510	-5.2	51
Djibouti	0.6	23	...	...	49
Equatorial Guinea	0.4	28	430	1.6	48
Eritrea	3.4	121	...	...	51
Ethiopia	53.4	1,101	130	-0.7	48
Gabon	1.0	258	3,550	-2.3	54
Gambia, The	1.1	10	360	0.6	45
Ghana	16.9	228	430	-0.1	56
Guinea	6.5	246	510	1.2	45
Guinea-Bissau	1.1	28	240	1.9	44
Kenya	26.0	569	250	0.0	58
Lesotho	2.0	30	700	0.5	61
Liberia	2.9	97	...	...	56
Madagascar	13.1	582	230	-1.7	57
Malawi	10.8	94	140	-2.0	45
Mali	9.5	1,220	250	1.0	46
Mauritania	2.2	1,025	480	0.3	52
Mauritius	1.1	2	3,180	5.8	71
Mozambique	16.6	784	80	3.5	46
Namibia	1.5	823	2,030	3.4	59
Niger	8.8	1,267	230	-2.2	47
Nigeria	107.9	911	280	1.2	51
Rwanda	7.8	25	80	-6.2	47
São Tomé & Principe	0.1	1	250	-1.4	...
Senegal	8.1	193	610	-0.5	50
Seychelles	0.1	0	6,210	4.6	...
Sierra Leone	4.6	72	150	-0.6	39
Somalia	9.1	627	...	-1.2	47
South Africa	41.6	1,221	3,010	-1.4	63
Sudan	27.4	2,376	...	-0.2	53
Swaziland	0.9	17	1,160	-1.0	58
Tanzania	28.8	884	...	0.8	52
Togo	4.0	54	320	-2.7	55
Uganda	18.6	200	200	3.0	45
Zaire	42.6	2,267	...	-0.8	52
Zambia	9.2	743	350	-1.3	48
Zimbabwe	11.0	387	490	-0.6	53
SUB-SAHARAN AFRICA	573.9	23,629	451	-1.2	52
excluding South Africa	532.3	22,408	259	-1.0	51
excluding South Africa & Nigeria	424.4	21,497	245	-1.5	51

... Indicates information not available.

Source: The World Bank, *African Development Indicators 1996* (Washington, DC: The World Bank, 1996).

ANGOLA						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$16,486,499	$10,244,942	$8,365,250	$37,088,257	$32,753,040
Imports	Agriculture	-	2,000	-	-	-
Exports	Chemicals & related products	12,431,824	8,222,332	9,788,072	7,333,274	11,476,931
Imports	Chemicals & related products	-	-	7,804	-	7,383,059
Exports	Electronic products	14,002,559	19,128,245	20,079,153	16,416,798	25,132,852
Imports	Electronic products	19,199	6,434	-	5,003	6,350
GSP imports	Electronic products	-	-	-	5,003	-
Exports	Energy related products	1,514,684	2,074,452	1,327,212	1,005,416	902,754
Imports	Energy related products	1,774,176,657	2,264,378,806	2,092,571,806	2,067,144,249	2,287,173,988
Exports	Footwear	55,677	281,799	188,403	162,013	287,867
Exports	Forest products	412,945	1,352,411	1,386,310	1,035,952	777,121
Imports	Forest products	-	3,000	-	-	3,554
GSP imports	Forest products	-	-	-	-	3,554
Exports	Machinery	20,608,486	20,732,944	18,092,708	16,487,177	24,837,462
Imports	Machinery	3,038	-	-	-	1,994
Exports	Minerals & metals	13,210,352	7,569,747	9,537,452	12,834,541	36,611,573
Imports	Minerals & metals	6,828,641	5,429,243	3,490,649	6,501,707	4,973,334
GSP imports	Minerals & metals	-	-	-	-	30,000
Exports	Miscellaneous manufactures	923,816	1,594,015	3,287,243	12,152,811	1,610,321
Imports	Miscellaneous manufactures	-	1,450	-	463,170	2,000
Exports	Special provisions	5,843,285	7,247,315	5,386,795	4,784,228	5,447,207
Imports	Special provisions	2,799,520	5,088,944	3,730,721	5,124,629	5,312,817
Exports	Textile & apparel	2,569,793	14,603,105	1,537,056	3,563,145	6,227,641
Imports	Textile & apparel	-	-	1,198	-	-
Exports	Transportation equipment	98,776,696	62,258,797	88,573,264	83,850,541	112,721,452
Imports	Transportation equipment	1,014,900	350,000	1,163,000	9,030	-
GSP imports	Transportation equipment	-	-	1,163,000	-	-
Total export value		186,836,616	155,310,104	167,548,918	196,714,153	258,786,221
Total import value		1,784,841,955	2,275,259,877	2,100,966,376	2,079,247,788	2,304,857,096
Total import (GSP) value		-	-	1,163,000	5,003	33,554

Source: U.S. Department of Commerce, Bureau of the Census.

BENIN						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$9,135,459	$12,647,346	$5,897,488	$14,497,176	$10,393,931
Imports	Agriculture	149,192	344,628	247,858	625,024	1,125,849
Exports	Chemicals & related products	800,404	333,428	504,734	653,068	336,589
Imports	Chemicals & related products	-	-	-	1,300	-
GSP imports	Chemicals & related products	-	-	-	1,300	-
Exports	Electronic products	335,538	565,796	573,504	396,050	1,389,163
Imports	Electronic products	-	-	1,181	-	-
Exports	Energy related products	-	51,771	398,954	9,099	48,922
Imports	Energy related products	21,980,797	9,025,416	14,327,889	7,708,178	7,467,621
Exports	Footwear	200,476	309,758	594,132	376,288	157,465
Exports	Forest products	129,446	127,338	115,724	63,031	14,161
Imports	Forest products	3,041	1,800	-	54,427	53,827
GSP imports	Forest products	-	-	-	47,204	53,827
Exports	Machinery	216,153	1,427,610	838,486	2,128,032	8,123,953
Exports	Minerals & metals	46,495	-	93,650	131,410	45,938
Imports	Minerals & metals	119,466	-	-	-	-
Exports	Miscellaneous manufactures	4,866	6,500	111,651	4,400	17,938
Imports	Miscellaneous manufactures	17,760	35,000	21,749	15,931	13,501
GSP imports	Miscellaneous manufactures	-	-	-	3,750	-
Exports	Special provisions	342,549	478,393	670,164	608,962	946,670
Imports	Special provisions	55,215	185,856	35,018	2,418	13,831
Exports	Textile & apparel	11,738,122	9,681,778	10,843,976	5,155,617	7,731,470
Imports	Textile & apparel	112,872	702,634	1,106,427	1,569,281	1,095,024
Exports	Transportation equipment	2,603,504	1,137,017	991,770	1,831,305	4,639,567
Imports	Transportation equipment	-	-	-	-	-
Total import value		25,553,012	26,766,735	21,634,233	25,854,438	33,845,767
Total import (GSP) value		22,438,343	10,295,334	15,740,122	9,976,559	9,769,653
Total export value		-	-	-	52,254	53,827

Source: U.S. Department of Commerce, Bureau of the Census.

BOTSWANA						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$17,818	$2,473,743	$643,282	$916,426	$3,834,717
Imports	Agriculture	7,784,494	8,040,160	2,055,978	1,195,953	203,320
GSP imports	Agriculture	505,257	272,425	700,695	400,838	167,200
Exports	Chemicals & related products	264,736	562,683	91,054	613,547	1,597,799
Imports	Chemicals & related products	-	28,883	-	-	351
Exports	Electronic products	12,117,433	3,125,879	9,016,183	4,668,308	6,654,507
Exports	Energy related products	31,430	-	-	9,163	15,441
Imports	Footwear	-	-	2,378	-	871
Exports	Forest products	114,239	131,226	394,123	289,448	1,053,099
Imports	Forest products	35,737	34,309	38,042	3,618	24,362
GSP imports	Forest products	-	30,617	34,394	3,618	16,605
Exports	Machinery	1,270,708	663,299	671,684	538,602	988,141
Imports	Machinery	-	-	-	35,947	-
GSP imports	Machinery	-	-	-	26,986	-
Exports	Minerals & metals	114,745	458,838	138,533	157,986	178,036
Imports	Minerals & metals	2,886,518	3,252,598	5,467,755	9,464,695	11,028,988
GSP imports	Minerals & metals	-	-	-	2,427	-
Exports	Miscellaneous manufactures	191,394	25,624	44,290	747,256	30,866
Imports	Miscellaneous manufactures	135,932	90,755	367,866	75,290	1,907,168
GSP imports	Miscellaneous manufactures	84,996	1,392	48,607	45,939	1,896,305
Exports	Special provisions	9,680,477	9,393,747	10,820,134	11,965,222	17,733,495
Imports	Special provisions	819,019	602,959	595,141	773,429	3,129,671
Exports	Textile & apparel	65,855	12,799	122,698	65,159	30,073
Imports	Textile & apparel	1,255,551	104,517	278	2,106,141	4,706,414
GSP imports	Textile & apparel	123,648	92,302	-	-	-
Exports	Transportation equipment	6,766,861	29,551,197	2,626,766	2,270,403	3,543,466
Imports	Transportation equipment	187,375	2,520	-	-	112,155
Total export value		30,635,696	46,399,035	24,568,747	22,241,520	35,659,640
Total import value		13,104,626	12,156,701	8,527,438	13,655,073	21,112,429
Total import (GSP) value		713,901	396,736	783,696	479,808	2,080,110

Source: U.S. Department of Commerce, Bureau of the Census.

BURKINA FASO						
	Sector	1991	1992	1993	1994	1995
Exports	Agriculture	$17,315,324	$6,395,238	$9,198,334	$2,413,290	$6,946,726
Imports	Agriculture	14,375	44,379	211,492	-	-
Exports	Chemicals & related products	502,921	329,301	54,268	21,916	98,307
Imports	Chemicals & related products	-	-	124,307	-	-
Exports	Electronic products	486,012	1,718,004	630,711	1,128,748	471,541
Imports	Electronic products	2,225	-	2,500	2,314	4,531
Exports	Footwear	-	-	-	5,000	-
Imports	Footwear	-	20,250	-	163,944	57,942
Exports	Forest products	-	3,750	17,381	44,992	31,958
Imports	Forest products	9,338	22,190	62,594	20,107	11,330
GSP imports	Forest products	9,338	22,190	62,594	18,827	11,330
Exports	Machinery	446,958	318,961	-	82,688	1,347,211
Imports	Machinery	-	-	-	-	12,161
Exports	Minerals & metals	21,211	8,554	33,140	16,266	78,093
Imports	Minerals & metals	10,707	5,107	16,089	27,735	2,000
GSP imports	Minerals & metals	2,983	1,632	-	27,735	2,000
Exports	Miscellaneous manufactures	-	56,302	-	54,940	6,713
Imports	Miscellaneous manufactures	15,513	27,072	25,874	70,979	90,977
GSP imports	Miscellaneous manufactures	2,064	14,711	10,691	19,909	17,647
Exports	Special provisions	605,581	351,352	761,464	372,024	746,962
Imports	Special provisions	336,664	2,678	5,979	143,817	186,389
Exports	Textile & apparel	3,694,284	3,728,576	2,872,192	2,738,036	4,180,175
Imports	Textile & apparel	10,977	113,380	24,221	15,893	11,945
GSP imports	Textile & apparel	6,567	3,249	6,835	6,045	5,034
Exports	Transportation equipment	410,699	205,121	4,081,736	361,388	668,594
Imports	Transportation equipment	98,262	-	-	-	1,900
Total export value		23,482,990	13,115,159	17,649,226	7,239,288	14,576,280
Total import value		498,061	235,056	473,056	444,789	379,175
Total import (GSP) value		20,952	41,782	80,120	72,516	36,011

Source: U.S. Department of Commerce, Bureau of the Census.

BURUNDI						
	Sector	**1991**	**1992**	**1993**	**1994**	**1995**
Exports	Agriculture	$7,946	$0	$139,141	$15,376,069	$483,077
Imports	Agriculture	8,036,511	6,495,114	1,267,109	1,944,445	18,824,248
Exports	Chemicals & related products	187,527	100,940	96,275	225,396	86,150
Exports	Electronic products	181,637	172,009	1,361,736	743,694	552,177
Exports	Footwear	-	-	-	-	6,000
Imports	Footwear	41,175	-	-	-	-
Exports	Forest products	24,415	867,748	47,236	-	-
Imports	Forest products	5,000	7,486	3,420	21,020	1,500
GSP imports	Forest products	-	7,486	3,000	6,020	1,500
Exports	Machinery	182,618	43,335	53,534	233,688	37,377
Exports	Minerals & metals	-	66,600	4,429	37,976	3,151
Imports	Minerals & metals	43,775	1,895,901	1,079,901	4,215,834	2,266,057
GSP imports	Minerals & metals	-	-	-	-	1,400
Exports	Miscellaneous manufactures	30,000	-	-	11,338	4,000
Imports	Miscellaneous manufactures	1,300	-	-	5,448	-
Exports	Special provisions	1,077,061	7,448,468	140,864	359,463	753,169
Imports	Special provisions	27,901	32,279	380,607	46,365	78,920
Exports	Textile & apparel	136,279	404,139	405,172	644,849	653,999
Imports	Textile & apparel	2,891	-	1,875	3,201	14,807
GSP imports	Textile & apparel	-	-	-	758	-
Exports	Transportation equipment	-	460,998	54,441	85,362	332,958
Total export value		1,827,483	9,564,237	2,302,828	17,717,835	2,912,058
Total import value		8,158,553	8,430,780	2,732,912	6,236,313	21,185,532
Total import (GSP) value		-	7,486	3,000	6,778	2,900

Source: U.S. Department of Commerce, Bureau of the Census.

CAMEROON						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$13,449,804	$22,086,858	$21,410,439	$11,138,316	$4,330,719
Imports	Agriculture	7,264,862	4,992,457	4,068,163	4,741,352	11,771,897
GSP imports	Agriculture	2,966,936	1,104,623	3,038,760	1,281,017	2,135,615
Exports	Chemicals & related products	5,819,575	4,435,576	5,034,257	4,108,378	3,740,241
Imports	Chemicals & related products	1,878,023	2,005,187	4,136,302	4,543,022	7,766,845
Exports	Electronic products	1,179,562	1,992,236	1,391,866	1,526,978	1,084,068
Imports	Electronic products	102,471	138,999	102,384	1,585,587	701,588
Exports	Energy related products	4,763,421	3,975,779	4,047,140	2,789,714	2,996,829
Imports	Energy related products	113,599,082	72,843,666	89,402,769	39,432,315	29,715,600
GSP imports	Energy related products	-	-	-	-	1,296
Exports	Footwear	-	211,219	322,981	94,506	193,937
Imports	Footwear	17,820	126,078	142,110	259,377	339,777
Exports	Forest products	3,664,246	3,410,549	2,559,778	2,257,249	6,777,503
Imports	Forest products	526,692	1,045,341	1,878,042	2,293,206	4,301,830
GSP imports	Forest products	20,385	113,957	78,575	64,986	107,725
Exports	Machinery	3,630,512	6,306,978	2,225,938	5,798,404	7,524,134
Imports	Machinery	209,078	3,440	163,644	113,421	0
Exports	Minerals & metals	950,218	704,487	896,922	834,866	1,642,475
Imports	Minerals & metals	670,088	129,050	121,752	332,585	1,089,984
GSP imports	Minerals & metals	564,096	12,435	21,810	33,264	27,906
Exports	Miscellaneous manufactures	1,869,943	208,650	217,202	604,422	661,993
Imports	Miscellaneous manufactures	510,583	151,939	248,751	1,350,718	935,483
GSP imports	Miscellaneous manufactures	4,019	-	17,802	20,660	70,587
Exports	Special provisions	1,083,772	1,593,041	1,704,872	1,462,877	1,483,834
Imports	Special provisions	850,480	792,435	335,960	645,753	125,988
Exports	Textile & apparel	607,079	562,924	664,029	1,266,457	1,501,998
Imports	Textile & apparel	39,477	117,368	277,337	973,742	829,271
GSP imports	Textile & apparel	-	-	7,752	-	-
Exports	Transportation equipment	8,443,997	11,377,832	7,740,692	21,580,663	13,633,496
Imports	Transportation equipment	7,000	-	341,868	34,539	12,300
Total export value		45,462,129	56,866,129	48,216,116	53,462,830	45,571,227
Total import value		125,675,656	82,345,960	101,219,082	56,305,617	57,590,563
Total import (GSP) value		3,555,436	1,231,015	3,164,699	1,399,927	2,343,129

Source: U.S. Department of Commerce, Bureau of the Census.

CAPE VERDE						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$3,108,566	$1,905,838	$2,068,135	$2,200,638	$4,615,443
Imports	Agriculture	-	-	18,987	-	6,192
GSP imports	Agriculture	-	-	18,987	-	-
Exports	Chemicals & related products	12,128	12,335	2,802	-	31,776
Imports	Chemicals & related products	-	-	1,323	-	37,407
Exports	Electronic products	315,463	275,765	1,035,796	712,322	861,018
Imports	Electronic products	-	-	-	116,176	184,131
Exports	Energy related products	10,227	9,101	-	15,000	-
Exports	Forest products	-	24,736	-	24,206	12,934
Imports	Forest products	-	-	1,662	-	-
Exports	Machinery	7,788	8,000	46,558	101,246	23,970
Imports	Machinery	-	-	-	2,945	-
Exports	Minerals & metals	-	21,075	6,449	21,932	8,085
Imports	Minerals & metals	2,900	-	8,261	-	1,950
Exports	Miscellaneous manufactures	24,724	18,100	-	3,950	-
Imports	Miscellaneous manufactures	2,100	-	-	4,278	-
Exports	Special provisions	381,727	693,110	702,770	729,243	1,115,950
Imports	Special provisions	-	-	2,246	-	-
Exports	Textile & apparel	-	12,886	-	-	35,893
Imports	Textile & apparel	-	54,600	-	-	48,735
Exports	Transportation equipment	80,249	55,809	131,707	80,720	104,118
Total export value		3,940,872	3,036,755	3,994,217	3,889,257	6,809,187
Total import value		5,000	54,600	32,479	123,399	278,415
Total import (GSP) value		-	-	18,987	-	-

Source: U.S. Department of Commerce, Bureau of the Census.

CENTRAL AFRICAN REPUBLIC (CAR)						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$307,986	$285,150	$639,470	$29,019	$0
Imports	Agriculture	311,512	515,318	193,245	1,100	171,556
GSP imports	Agriculture	39,533	470,325	151,705	-	163,453
Exports	Chemicals & related products	19,335	78,645	10,400	169,091	1,013,341
Exports	Electronic products	186,543	152,601	196,548	462,398	2,742,536
Exports	Forest products	2,618	-	37,501	2,520	-
Imports	Forest products	-	-	-	19,821	48,388
GSP imports	Forest products	-	-	-	1,565	-
Exports	Machinery	499,228	210,590	1,078,359	746,213	792,919
Exports	Minerals & metals	15,180	100,556	207,299	24,404	37,194
Imports	Minerals & metals	115,332	-	54,180	-	101,945
Exports	Miscellaneous manufactures	4,000	-	-	-	9,009
Imports	Miscellaneous manufactures	-	42,460	3,000	210,000	32,048
Exports	Special provisions	119,926	91,018	387,814	291,933	694,891
Imports	Special provisions	5,101	99,964	4,592	649	505
Exports	Textile & apparel	3,250	25,911	116,304	182,414	534,099
Imports	Textile & apparel	800	-	3,380	17,582	-
Exports	Transportation equipment	55,299	49,498	2,195,901	626,651	303,836
Total export value		1,213,365	993,969	4,869,596	2,534,643	6,127,825
Total import value		432,745	657,742	258,397	249,152	354,442
Total import (GSP) value		39,533	470,325	151,705	1,565	163,453

Source: U.S. Department of Commerce, Bureau of the Census.

CHAD						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$5,361,795	$391,883	$1,148,510	$929,807	$822,824
Imports	Agriculture	3,671	284,831	220,883	1,490,465	3,131,197
Exports	Chemicals & related products	45,938	106,915	179,840	57,648	59,358
Imports	Chemicals & related products	-	-	-	-	-
Exports	Electronic products	3,684,779	561,547	239,977	574,984	5,150,037
Imports	Electronic products	-	-	6,750	-	-
Exports	Energy related products	-	-	-	-	11,623
Imports	Energy related products	-	-	-	1,440	3,850
Imports	Footwear	37,251	-	-	-	-
Exports	Forest products	174,846	120,047	137,443	43,371	3,225
Imports	Forest products	-	-	-	-	-
Exports	Machinery	631,923	2,794,742	2,062,071	1,560,284	979,003
Exports	Minerals & metals	7,003	302,284	487,743	175,592	11,946
Imports	Minerals & metals	-	-	2,000	2,100	-
Exports	Miscellaneous manufactures	6,401	-	17,200	85,248	10,825
Imports	Miscellaneous manufactures	-	-	-	38,138	-
Exports	Special provisions	585,105	184,384	304,874	1,908,814	326,809
Imports	Special provisions	199,927	770	59,164	272,980	118,876
Exports	Textile & apparel	-	87,500	32,670	33,391	81,287
Imports	Textile & apparel	480	29,775	-	653	1,679
Exports	Transportation equipment	3,104,859	684,081	3,101,623	2,067,139	2,925,747
	Total export value	13,602,649	5,233,383	7,711,951	7,436,278	10,382,684
	Total import value	241,329	315,376	288,797	1,805,776	3,255,602
	Total import (GSP) value	-	-	-	-	-

Source: U.S. Department of Commerce, Bureau of the Census.

COMOROS						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$0	$471,592	$0	$0	$554,679
Imports	Agriculture	9,014,155	9,897,976	9,395,655	5,866,380	1,823,601
Exports	Chemicals & related products	-	7,965	150,376	36,720	59,360
Imports	Chemicals & related products	383,425	362,985	147,694	108,750	392,436
GSP imports	Chemicals & related products	-	-	-	-	305,100
Exports	Electronic products	29,904	67,480	3,778	40,466	37,928
Imports	Electronic products	30,042	60,492	-	-	-
Exports	Forest products	-	-	-	4,679	-
Exports	Machinery	2,865	-	7,228	-	-
Imports	Machinery	206,050	-	-	-	-
Exports	Miscellaneous manufactures	37,000	-	11,876	3,164	-
Exports	Special provisions	11,531	48,555	61,147	13,012	11,159
Imports	Special provisions	25,010	32,572	29,871	20,012	6,567
Exports	Textile & apparel	-	-	-	2,602	-
Imports	Textile & apparel	91,174	-	-	39,085	1,380
Exports	Transportation equipment	28,191	36,712	75,000	-	15,626
Imports	Transportation equipment	365,972	-	-	-	-
Total export value		109,491	632,304	309,405	100,643	678,752
Total import value		10,115,828	10,354,025	9,573,220	6,034,227	2,223,984
Total import (GSP) value		-	-	-	-	305,100

Source: U.S. Department of Commerce, Bureau of the Census.

CONGO						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$2,124,517	$6,404,907	$464,860	$6,250,180	$6,047,928
Imports	Agriculture	24,927	3,047,828	3,075,899	10,995	-
GSP imports	Agriculture	24,927	3,047,828	2,939,315	10,995	-
Exports	Chemicals & related products	1,075,034	2,358,586	3,522,063	2,213,588	2,720,646
Imports	Chemicals & related products	68,578	-	44,584	835	126,121
GSP imports	Chemicals & related products	-	-	-	300	-
Exports	Electronic products	2,061,509	2,968,915	2,693,876	999,591	2,962,956
Imports	Electronic products	-	-	-	15,540	105,228
Exports	Energy related products	98,682	288,084	150,919	223,977	279,826
Imports	Energy related products	403,660,477	503,671,588	492,912,508	387,973,387	173,934,860
Exports	Footwear	7,478	-	-	11,545	-
Exports	Forest products	3,579	59,335	11,993	131,450	16,813
Imports	Forest products	688,511	174,681	529,681	470,234	2,695,067
Exports	Machinery	3,220,232	7,486,399	2,306,974	3,190,324	7,746,271
Imports	Machinery	22,653	19,436	725,960	-	-
Exports	Minerals & metals	2,437,098	1,667,475	1,326,745	3,854,707	5,064,385
Imports	Minerals & metals	2,200,769	711,776	751,490	13,783,995	16,015,063
Exports	Miscellaneous manufactures	34,464	66,452	139,696	24,749	29,808
Imports	Miscellaneous manufactures	143,000	105,719	20,137	45,810	55,100
Exports	Special provisions	1,594,424	1,135,786	1,690,430	1,190,241	1,834,632
Imports	Special provisions	2,828,100	2,034,439	1,916,977	707,017	558,038
Exports	Textile & apparel	33,380	130,826	170,564	26,645	3,447
Imports	Textile & apparel	-	-	1,310	-	-
Exports	Transportation equipment	30,423,724	36,792,466	14,881,635	19,776,239	27,695,604
Imports	Transportation equipment	-	-	29,993	22,160	-
Total export value		43,114,121	59,359,231	27,359,755	37,893,236	54,402,316
Total import value		409,637,015	509,765,467	500,008,539	403,029,973	193,489,477
Total import (GSP) value		24,927	3,047,828	2,939,315	11,295	-

Source: U.S. Department of Commerce, Bureau of the Census.

	COTE D'IVOIRE					
	Sector	1991	1992	1993	1994	1995
Exports	Agriculture	$29,826,632	$27,571,315	$26,741,867	$24,815,157	$37,959,345
Imports	Agriculture	161,511,267	137,008,158	128,594,465	142,031,116	168,827,576
GSP imports	Agriculture	11,941,947	6,270,908	12,498,644	10,050,480	7,524,986
Exports	Chemicals & related products	11,035,952	12,681,794	11,548,523	19,244,294	32,580,128
Imports	Chemicals & related products	7,487,227	6,591,691	6,825,910	8,927,593	13,120,366
GSP imports	Chemicals & related products	-	-	4,789	1,543	-
Exports	Electronic products	3,008,119	9,764,766	7,266,811	19,739,452	5,234,476
Imports	Electronic products	772,205	483,490	940,846	1,104,640	9,493,943
GSP imports	Electronic products	-	12,500	548,895	-	-
Exports	Energy related products	5,125,321	1,779,014	1,636,676	180,168	2,792,663
Imports	Energy related products	18,708,203	21,778,350	25,901,410	6,272,725	5,426,222
Exports	Footwear	20,152	370,375	42,603	192,032	206,921
Imports	Footwear	101,861	182,610	1,176,839	512,499	176,969
Exports	Forest products	7,178,101	7,486,686	7,047,418	7,701,404	22,956,895
Imports	Forest products	4,557,358	2,629,501	3,938,738	4,910,802	4,761,748
GSP imports	Forest products	89,416	164,516	393,326	579,550	337,092
Exports	Machinery	8,017,641	5,023,320	7,503,398	12,857,280	10,934,729
Imports	Machinery	629,264	58,191	75,285	354,293	45,925
GSP imports	Machinery	-	-	1,940	7,888	-
Exports	Minerals & metals	657,215	908,332	1,448,617	3,319,826	5,999,929
Imports	Minerals & metals	19,627,923	13,661,635	3,724,606	866,809	8,313,089
GSP imports	Minerals & metals	94,987	46,973	4,552	23,334	27,897
Exports	Miscellaneous manufactures	482,581	604,763	271,041	502,072	370,836
Imports	Miscellaneous manufactures	1,616,690	864,832	807,415	18,510,340	1,122,624
GSP imports	Miscellaneous manufactures	12,127	51,279	12,323	28,385	18,981
Exports	Special provisions	3,905,510	2,660,916	3,596,608	2,953,893	3,902,579
Imports	Special provisions	459,176	564,736	2,530,767	546,992	1,956,858
Exports	Textile & apparel	5,608,537	3,847,868	4,907,036	5,610,463	10,609,732
Imports	Textile & apparel	2,110,960	3,630,366	3,569,945	1,265,914	795,768
GSP imports	Textile & apparel	1,254	2,490	2,625	1,896	10,423
Exports	Transportation equipment	4,548,461	13,661,590	15,733,870	12,935,457	38,766,900
Imports	Transportation equipment	10,256	-	135,100	41,258	36,733
Total export value		79,414,222	86,360,739	87,744,468	110,051,498	172,315,133
Total import value		217,592,390	187,453,560	178,221,326	185,344,981	214,077,821
Total import (GSP) value		12,139,731	6,548,666	13,467,094	10,693,076	7,919,379

Source: U.S. Department of Commerce, Bureau of the Census.

DJIBOUTI

	Sector	1991	1992	1993	1994	1995
Exports	Agriculture	$1,668,595	$2,006,660	$4,041,777	$2,242,945	$3,631,951
Imports	Agriculture	-	-	24,901	19,600	-
Exports	Chemicals & related products	166,366	323,364	61,050	234,292	145,744
Imports	Chemicals & related products	-	-	-	1,320	-
Exports	Electronic products	261,672	319,710	886,490	816,780	184,810
Imports	Electronic products	-	-	-	-	25,980
Exports	Energy related products	28,727	26,219	24,909	-	4,375
Exports	Forest products	301,477	131,361	99,268	40,238	98,455
Imports	Forest products	-	-	1,500	-	2,000
GSP imports	Forest products	-	-	1,500	-	-
Exports	Machinery	835,515	768,224	988,443	726,205	588,133
Exports	Minerals & metals	663,923	86,400	88,511	23,924	4,034
Imports	Minerals & metals	-	-	-	26,824	-
Exports	Miscellaneous manufactures	81,734	53,125	134,453	69,998	28,486
Imports	Miscellaneous manufactures	-	-	-	-	6,070
GSP imports	Miscellaneous manufactures	-	-	-	-	6,070
Exports	Special provisions	1,049,679	2,009,096	899,438	303,026	452,352
Imports	Special provisions	26,966	-	1,751	14,458	-
Exports	Textile & apparel	4,216,863	4,616,570	5,537,888	2,014,061	3,290,481
Exports	Transportation equipment	700,114	245,938	190,914	231,677	28,665
Imports	Transportation equipment	25,897	-	-	-	-
Total export value		9,974,665	10,586,667	12,953,141	6,703,146	8,457,486
Total import value		52,863	-	28,152	62,202	34,050
Total import (GSP) value		-	-	1,500	-	6,070

Source: U.S. Department of Commerce, Bureau of the Census.

EQUATORIAL GUINEA						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$2,256,259	$2,416,410	$0	$17,342	$13,175
Exports	Chemicals & related products	13,683	532,728	350,353	40,906	881,429
Imports	Chemicals & related products	-	-	-	23,387	-
GSP imports	Chemicals & related products	-	-	-	23,387	-
Exports	Electronic products	202,931	85,068	216,720	107,885	177,203
Imports	Electronic products	-	23,578	-	288,816	423,124
Exports	Energy related products	-	4,730	-	-	-
Imports	Energy related products	-	-	3,640,260	-	27,648,228
Exports	Footwear	-	10,000	157,622	-	-
Exports	Forest products	712,980	430,659	16,712	42,391	22,391
Imports	Forest products	1,800	-	-	-	2,339,475
Exports	Machinery	2,966	56,750	238,476	66,016	1,130,586
Imports	Machinery	-	-	-	-	20,278
Exports	Minerals & metals	17,336	1,292,315	40,869	8,100	98,231
Imports	Minerals & metals	-	101,290	-	-	-
Exports	Miscellaneous manufactures	-	13,400	-	-	-
Imports	Miscellaneous manufactures	1,879	-	-	13,035	2,813
GSP imports	Miscellaneous manufactures	1,879	-	-	-	-
Exports	Special provisions	195,707	185,088	377,838	23,174	97,891
Imports	Special provisions	217,444	668	39,591	986	501,223
Exports	Textile & apparel	82,752	59,084	78,113	128,091	145,414
Imports	Textile & apparel	-	-	-	-	34,350
Exports	Transportation equipment	9,191,914	5,639,912	1,956,274	1,459,907	2,768,881
Total export value		12,676,528	10,726,144	3,432,977	1,893,812	5,335,201
Total import value		221,123	125,536	3,679,851	326,224	30,969,491
Total import (GSP) value		1,879	-	-	23,387	-

Source: U.S. Department of Commerce, Bureau of the Census.

ERITREA						
	Sector	1991	1992	1993	1994	1995
Exports	Agriculture	$0	$0	$263,854	$5,919,115	$3,309,757
Imports	Agriculture	-	-	-	12,004	83,540
Exports	Chemicals & related products	-	-	-	5,402	21,406
Imports	Chemicals & related products	-	-	-	-	74,991
Exports	Electronic products	-	-	430,372	637,162	2,302,568
Imports	Electronic products	-	-	-	-	32,742
Exports	Forest products	-	-	-	90,528	48,000
Imports	Forest products	-	-	-	-	17,342
Exports	Machinery	-	-	3,912	397,004	2,123,563
Exports	Minerals & Metals	-	-	-	17,500	3,645
Exports	Miscellaneous Manufactures	-	-	-	-	125,000
Imports	Miscellaneous Manufactures	-	-	-	69,962	-
Exports	Special Provisions	-	-	215,876	375,488	650,168
Imports	Special Provisions	-	-	-	16,500	12,279
Exports	Textile & Apparel	-	-	-	-	5,206
Imports	Textile & Apparel	-	-	-	4,197	40,986
Exports	Transportation equipment	-	-	4,100	711,369	7,950,859
	Total export value	-	-	918,114	8,153,568	16,540,172
	Total import value	-	-	-	102,663	261,880
	Total import (GSP) value	-	-	-	-	-

Source: U.S. Department of Commerce, Bureau of the Census.

ETHIOPIA						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$59,589,439	$66,096,062	$69,012,930	$85,499,753	$62,862,035
Imports	Agriculture	8,619,320	7,463,621	19,808,366	31,671,894	29,713,299
GSP imports	Agriculture	-	-	28,112	-	39,507
Exports	Chemicals & related products	2,603,421	4,342,464	15,880,138	6,861,022	27,041,781
Imports	Chemicals & related products	2,284,446	508,298	87,921	120,055	1,009,366
GSP imports	Chemicals & related products	-	-	593	900	363,260
Exports	Electronic products	2,385,572	3,760,678	4,295,866	8,872,878	6,063,979
Imports	Electronic products	9,623	-	-	7,800	1,314
Exports	Energy related products	13,827	6,924	51,513	123,463	46,302
Exports	Footwear	-	-	-	-	8,794
Imports	Footwear	-	-	962	1,754	-
Exports	Forest products	195,878	402,586	1,253,479	653,561	1,494,532
Imports	Forest products	16,694	-	6,645	20,735	7,460
GSP imports	Forest products	-	-	2,000	2,000	-
Exports	Machinery	1,030,325	1,153,523	3,969,338	8,463,464	17,557,426
Imports	Machinery	-	10,000	-	61,769	-
Exports	Minerals & metals	519,150	251,461	523,256	504,277	563,500
Imports	Minerals & metals	10,690	2,196	6,125	10,533	269,575
GSP imports	Minerals & metals	-	-	-	6,700	2,054
Exports	Miscellaneous manufactures	167,830	47,730	116,828	202,610	168,100
Imports	Miscellaneous manufactures	23,615	11,158	396,158	38,776	16,123
GSP imports	Miscellaneous manufactures	-	-	15,944	34,396	8,352
Exports	Special provisions	13,237,204	6,005,304	7,789,819	6,626,392	7,858,486
Imports	Special provisions	2,564,131	315,603	1,585,530	967,259	860,274
Exports	Textile & apparel	156,129	830,546	1,500,054	941,651	1,272,544
Imports	Textile & apparel	810,984	41,475	166,108	1,185,425	906,645
GSP imports	Textile & apparel	-	-	-	102,700	-
Exports	Transportation equipment	130,150,690	166,452,234	31,667,715	23,671,891	21,854,640
Imports	Transportation equipment	-	4,000	5,000	13,872	-
Total export value		210,049,465	249,349,512	136,060,936	142,420,962	146,792,119
Total import value		14,339,503	8,356,351	22,062,815	34,099,872	32,784,056
Total import (GSP) value		-	-	46,649	146,696	413,173

Source: U.S. Department of Commerce, Bureau of the Census.

GABON						
	Sector	1991	1992	1993	1994	1995
Exports	Agriculture	$1,529,852	$1,321,717	$1,867,219	$1,553,282	$1,053,357
Imports	Agriculture	3,740,916	2,899,941	292,035	465,197	299,397
Exports	Chemicals & related products	1,722,145	1,613,097	1,314,763	1,976,281	2,002,374
Imports	Chemicals & related products	63,770	5,143,368	327,009	407,603	410,804
Exports	Electronic products	11,345,801	6,203,516	3,188,616	4,481,625	2,564,385
Imports	Electronic products	-	28,835	2,913	11,927	8,272
Exports	Energy related products	157,430	319,771	618,609	909,740	534,053
Imports	Energy related products	674,842,562	890,820,524	905,257,420	1,207,817,612	1,540,001,202
Exports	Footwear	5,155	21,557	-	-	3,107
Imports	Footwear	-	-	36,397	-	-
Exports	Forest products	431,126	84,684	241,383	1,542,804	1,168,577
Imports	Forest products	53,689	34,143	5,213	137,831	153,814
Exports	Machinery	3,871,032	9,679,010	5,549,783	6,673,212	6,522,756
Imports	Machinery	-	-	2,518	112,130	-
Exports	Minerals & metals	3,064,172	1,196,673	1,415,253	965,311	2,103,447
Imports	Minerals & metals	29,865,990	27,497,853	15,353,413	22,275,935	20,569,511
Exports	Miscellaneous manufactures	487,729	69,525	117,135	369,884	827,950
Imports	Miscellaneous manufactures	189,429	53,792	107,515	431,215	56,096
Exports	Special provisions	2,854,997	1,372,498	1,049,279	1,406,182	1,650,317
Imports	Special provisions	2,789,231	873,315	1,286,518	1,046,058	2,375,079
Exports	Textile & apparel	304,410	127,872	920,230	309,983	377,141
Imports	Textile & apparel	13,475	555,092	10,764	3,291	1,293
Exports	Transportation equipment	58,484,460	32,656,471	31,091,599	19,883,045	35,110,087
Imports	Transportation equipment	-	7,000	-	-	-
	Total export value	84,258,309	54,666,391	47,373,869	40,071,349	53,917,551
	Total import value	711,559,062	927,913,863	922,681,715	1,232,708,799	1,563,875,468
	Total import (GSP) value	-	-	-	-	-

Source: U.S. Department of Commerce, Bureau of the Census.

GAMBIA						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$4,686,523	$4,043,806	$4,620,529	$1,441,542	$3,048,496
Imports	Agriculture	97,219	-	6,351,967	15,417	26,164
GSP imports	Agriculture	42,500	-	9,525	5,808	5,203
Exports	Chemicals & related products	2,173,596	1,389,676	1,999,190	97,970	148,388
Imports	Chemicals & related products	-	92,015	1,100	-	3,892
GSP imports	Chemicals & related products	-	-	1,100	-	-
Exports	Electronic products	592,188	1,664,033	1,032,563	681,906	770,936
Imports	Electronic products	-	24,000	-	14,816	26,466
Exports	Energy related products	9,013	79,220	40,425	-	-
Exports	Forest products	45,981	20,380	35,871	-	161,506
Imports	Forest products	3,500	57,845	9,800	1,600	11,850
GSP imports	Forest products	3,500	28,300	2,800	-	11,850
Exports	Machinery	159,884	224,705	579,687	500,290	182,121
Imports	Machinery	-	50,000	-	-	2,300
Exports	Minerals & metals	132,611	84,432	148,855	149,181	326,242
Imports	Minerals & metals	2,024,328	717,753	1,991,933	1,950,803	2,096,001
GSP imports	Minerals & metals	-	-	-	-	1,500
Exports	Miscellaneous manufactures	123,609	57,077	86,419	47,500	21,241
Imports	Miscellaneous manufactures	3,553	-	4,133	11,363	12,566
GSP imports	Miscellaneous manufactures	3,553	-	2,595	2,000	10,150
Exports	Special provisions	195,797	219,117	263,872	261,310	633,982
Imports	Special provisions	31,577	8,954	26,250	220,797	7,215
Exports	Textile & apparel	2,319,198	2,117,069	1,218,726	469,577	627,720
Imports	Textile & apparel	59,735	138,180	209,221	458,952	62,267
GSP imports	Textile & apparel	-	-	509	-	400
Exports	Transportation equipment	223,449	85,385	50,994	202,230	67,720
Imports	Transportation equipment	-	53,797	-	11,019	10,199
Total export value		10,661,849	9,984,900	10,077,131	3,851,506	5,988,352
Total import value		2,219,912	1,142,544	8,594,404	2,684,767	2,258,920
Total import (GSP) value		49,553	28,300	16,529	7,808	29,103

Source: U.S. Department of Commerce, Bureau of the Census.

GHANA						
	Sector	1991	1992	1993	1994	1995
Exports	Agriculture	$15,073,402	$27,067,834	$45,378,047	$36,631,008	$46,526,838
Imports	Agriculture	83,489,156	44,664,631	58,505,777	17,361,890	58,699,399
GSP imports	Agriculture	612,412	889,148	1,577,586	938,619	677,281
Exports	Chemicals & related products	28,115,463	21,066,747	41,647,699	15,004,636	27,332,777
Imports	Chemicals & related products	360,239	100,063	65,645	156,889	646,072
GSP imports	Chemicals & related products	-	-	-	960	-
Exports	Electronic products	8,886,593	8,249,086	9,904,157	8,512,579	10,254,441
Imports	Electronic products	6,129	-	42,291	14,458	8,536
Exports	Energy related products	15,092,909	6,537,638	506,072	5,279,579	7,902,777
Imports	Energy related products	57,728	7,123,675	11,243,167	21,117,842	-
Exports	Footwear	368,793	308,316	470,306	297,141	386,773
Imports	Footwear	-	1,311	820	448	-
Exports	Forest products	1,752,298	1,401,935	8,353,152	1,361,365	2,750,423
Imports	Forest products	1,555,065	1,960,146	2,226,465	4,191,968	6,722,541
GSP imports	Forest products	142,319	210,528	347,021	455,262	637,049
Exports	Machinery	21,796,346	12,739,521	37,607,101	11,914,972	15,553,592
Imports	Machinery	54,081	208,925	90,246	-	25,048
Exports	Minerals & metals	11,057,329	7,519,574	11,678,142	5,186,993	7,120,873
Imports	Minerals & metals	65,159,657	41,249,485	126,826,212	152,902,543	125,112,274
GSP imports	Minerals & metals	643,152	800,156	411,968	1,264,446	96,969
Exports	Miscellaneous manufactures	2,756,637	1,677,370	3,178,780	1,142,416	738,249
Imports	Miscellaneous manufactures	53,866	91,743	110,934	303,328	541,918
GSP imports	Miscellaneous manufactures	29,598	61,063	96,350	193,880	331,018
Exports	Special provisions	8,420,251	7,126,955	9,481,068	5,008,168	6,743,565
Imports	Special provisions	643,599	642,418	8,276,085	509,804	1,331,375
Exports	Textile & apparel	7,884,602	9,004,193	10,708,254	7,330,010	7,758,983
Imports	Textile & apparel	152,208	378,784	1,081,085	1,920,116	2,980,937
GSP imports	Textile & apparel	16,550	8,566	40,818	15,836	33,702
Exports	Transportation equipment	19,479,005	16,987,070	32,378,687	23,700,184	33,631,794
Imports	Transportation equipment	79,357	-	-	7,013	6,000
GSP imports	Transportation equipment	-	-	-	-	2,000
Total export value		140,683,628	119,686,239	211,291,465	121,369,051	166,701,085
Total import value		151,611,085	96,421,181	208,468,727	198,486,299	196,074,100
Total import (GSP) value		1,444,031	1,969,461	2,473,743	2,869,003	1,778,019

Source: U.S. Department of Commerce, Bureau of the Census.

GUINEA						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$33,089,385	$23,795,698	$27,116,157	$16,801,381	$29,296,273
Imports	Agriculture	363,089	599,142	649,064	311,066	332,748
GSP imports	Agriculture	114,203	98,426	47,416	4,263	5,458
Exports	Chemicals & related products	9,130,115	4,328,206	5,280,247	5,045,103	5,203,680
Imports	Chemicals & related products	567	52,585	4,873,088	598	90,677
GSP imports	Chemicals & related products	-	-	-	598	-
Exports	Electronic products	2,886,135	3,691,826	3,464,001	3,711,961	4,085,500
Imports	Electronic products	17,810	-	3,259	153,134	628,954
GSP imports	Electronic products	-	-	-	10,550	-
Exports	Energy related products	5,906,122	4,521,767	1,634,111	1,261,600	1,267,342
Imports	Energy related products	-	-	4,490,414	-	-
Exports	Footwear	24,394	25,994	31,018	91,374	49,035
Imports	Footwear	-	44,445	-	-	-
Exports	Forest products	715,673	927,102	1,036,400	980,616	1,321,293
Imports	Forest products	34,410	61,089	58,857	14,919	11,917
GSP imports	Forest products	11,785	33,400	8,850	13,419	3,330
Exports	Machinery	4,061,830	3,134,644	2,754,836	2,812,370	3,077,733
Imports	Machinery	6,274	5,876	20,240	3,000	38,762
GSP imports	Machinery	4,691	-	-	3,000	10,882
Exports	Minerals & metals	1,852,867	1,385,123	1,728,896	1,416,566	1,431,369
Imports	Minerals & metals	122,519,907	100,142,121	102,258,317	90,011,777	91,041,631
Exports	Miscellaneous manufactures	734,949	637,722	469,620	278,499	417,121
Imports	Miscellaneous manufactures	16,978	78,005	195,812	42,202	46,726
GSP imports	Miscellaneous manufactures	-	-	3,275	4,375	3,120
Exports	Special provisions	9,651,482	4,744,957	4,450,386	5,228,520	7,884,128
Imports	Special provisions	664,173	377,975	408,477	2,202,170	687,521
Exports	Textile & apparel	1,642,837	1,589,719	1,590,753	2,016,385	2,594,093
Imports	Textile & apparel	94,085	8,807	12,984	73,953	155,394
Exports	Transportation equipment	15,380,521	11,155,292	7,703,621	7,650,547	9,674,693
Imports	Transportation equipment	-	-	3,000	2,500	80,240
Total export value		85,076,310	59,938,050	57,260,046	47,294,922	66,302,260
Total import value		123,717,293	101,370,045	112,973,512	92,815,319	93,114,570
Total import (GSP) value		130,679	131,826	59,541	36,205	22,790

Source: U.S. Department of Commerce, Bureau of the Census.

GUINEA-BISSAU						
	Sector	1991	1992	1993	1994	1995
Exports	Agriculture	$57,917	$15,294	$652,096	$20,711	$376,904
Exports	Chemicals & related products	-	-	-	204,958	-
Exports	Electronic products	54,474	1,308,639	402,851	512,282	476,947
Imports	Electronic products	-	15,088	-	-	-
Exports	Footwear	-	-	-	56,552	-
Exports	Forest products	-	-	-	4,942	-
Imports	Forest products	-	1,500	-	-	39,000
Exports	Machinery	748,841	-	-	14,129	-
Exports	Minerals & metals	7,677	3,413	-	-	-
Imports	Minerals & metals	84,150	-	198,241	-	-
Exports	Miscellaneous manufactures	-	-	25,777	29,783	-
Exports	Special provisions	31,323	30,966	17,257	30,714	14,323
Imports	Special provisions	-	6,962	10,431	-	-
Exports	Textile & apparel	-	23,500	-	-	-
Imports	Textile & apparel	1,000	1,150	-	-	-
Exports	Transportation equipment	533,013	84,342	546,420	105,636	-
	Total export value	1,433,245	1,466,154	1,644,401	979,707	868,174
	Total import value	85,150	24,700	208,672	-	39,000
	Total import (GSP) value	-	-	-	-	-

Source: U.S. Department of Commerce, Bureau of the Census.

KENYA						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$7,898,366	$47,574,058	$29,186,982	$57,393,850	$33,912,108
Imports	Agriculture	43,466,972	40,705,863	44,831,229	53,627,041	48,639,878
GSP imports	Agriculture	2,682,687	2,260,727	3,037,061	3,938,177	2,118,917
Exports	Chemicals & related products	20,795,739	16,939,763	17,784,172	26,378,096	17,086,989
Imports	Chemicals & related products	5,480,523	535,632	865,229	1,495,266	1,476,989
GSP imports	Chemicals & related products	178,805	-	-	91,011	18,753
Exports	Electronic products	13,477,589	8,044,829	8,535,813	13,719,721	11,952,761
Imports	Electronic products	658,997	4,113,775	1,542,359	1,431,553	3,778,015
GSP imports	Electronic products	66,324	6,354	38,535	16,310	211,261
Exports	Energy related products	2,283,179	285,702	2,262,855	3,259,633	2,324,573
Imports	Energy related products	3,968,058	3,387,023	8,008,247	101,356	-
Exports	Footwear	-	15,000	3,757	106,643	272,969
Imports	Footwear	378,232	166,065	122,620	306,597	510
GSP imports	Footwear	-	66,838	-	-	-
Exports	Forest products	1,865,753	2,311,038	1,486,566	1,609,066	3,286,050
Imports	Forest products	1,361,434	1,720,391	2,230,223	2,512,502	2,159,201
GSP imports	Forest products	1,234,229	1,533,015	2,138,253	2,208,216	1,937,750
Exports	Machinery	16,792,620	16,840,685	19,370,730	10,308,879	12,735,285
Imports	Machinery	520,039	629,806	1,134,669	235,652	166,040
GSP imports	Machinery	-	6,866	7,570	173,060	-
Exports	Minerals & metals	1,706,759	959,587	1,063,693	1,262,237	2,344,207
Imports	Minerals & metals	1,898,235	1,851,632	2,965,458	3,741,227	2,873,879
GSP imports	Minerals & metals	899,821	763,272	1,367,044	1,969,408	1,738,104
Exports	Miscellaneous manufactures	2,816,312	428,275	991,908	1,448,624	399,404
Imports	Miscellaneous manufactures	1,141,038	806,347	1,102,720	1,655,681	1,330,859
GSP imports	Miscellaneous manufactures	327,959	338,641	594,536	721,964	464,626
Exports	Special provisions	4,588,167	7,688,743	8,057,354	25,958,272	5,296,195
Imports	Special provisions	9,180,084	11,032,476	4,836,187	7,759,906	4,237,313
Exports	Textile & apparel	2,204,528	1,854,247	2,624,266	3,383,417	3,422,496
Imports	Textile & apparel	5,653,954	8,085,472	24,059,432	38,016,844	36,665,664
GSP imports	Textile & apparel	8,083	5,187	10,994	22,135	121,860
Exports	Transportation equipment	16,611,180	20,057,370	24,095,784	23,656,012	19,613,237
Imports	Transportation equipment	63,828	299,815	577,145	80,639	106,844
Total export value		91,040,192	122,999,297	115,463,880	168,484,450	112,646,274
Total import value		73,771,394	73,334,297	92,275,518	110,964,264	101,435,192
Total import (GSP) value		5,397,908	4,980,900	7,193,993	9,140,281	6,611,271

Source: U.S. Department of Commerce, Bureau of the Census.

LESOTHO						
	Sector	1991	1992	1993	1994	1995
Exports	Agriculture	$1,661,958	$1,780,595	$2,482,236	$2,708,908	$1,496,060
Imports	Agriculture	54,279	13,778	-	-	-
GSP imports	Agriculture	27,537	13,778	-	-	-
Exports	Chemicals & related products	196,440	42,529	136,273	33,946	15,178
Imports	Chemicals & related products	-	-	-	12,776	1,524
GSP imports	Chemicals & related products	-	-	-	12,776	1,524
Exports	Electronic products	170,964	647,761	112,988	115,714	121,855
Exports	Forest products	32,696	7,500	-	3,573	-
Exports	Machinery	827,335	55,058	44,450	35,550	24,225
Exports	Minerals & metals	14,073	-	-	-	-
Imports	Minerals & metals	-	1,218,628	458,218	82,680	82,646
Exports	Miscellaneous manufactures	76,000	61,443	47,487	-	-
Imports	Miscellaneous manufactures	1,315	2,240	-	30,215	1,000
GSP imports	Miscellaneous manufactures	1,315	2,240	-	30,215	1,000
Exports	Special provisions	455,306	66,406	347,230	71,968	258,940
Imports	Special provisions	85,518	89,833	169,918	155,047	32,445
Exports	Textile & apparel	-	159,600	150,000	11,439	34,730
Imports	Textile & apparel	27,043,606	51,063,910	55,093,200	62,456,253	61,791,698
GSP imports	Textile & apparel	-	-	1,734	7,866	-
Exports	Transportation equipment	6,107	232,191	693,618	349,453	35,000
Total export value		3,440,879	3,053,083	4,014,282	3,330,551	1,985,988
Total import value		27,184,718	52,388,389	55,721,336	62,736,971	61,909,313
Total import (GSP) value		28,852	16,018	1,734	50,857	2,524

Source: U.S. Department of Commerce, Bureau of the Census.

LIBERIA						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$37,486,152	$14,996,414	$14,007,830	$36,192,531	$29,838,724
Imports	Agriculture	2,931	-	-	2,750	2,412
Exports	Chemicals & related products	890,006	1,695,622	775,741	834,563	962,549
Imports	Chemicals & related products	6,666,492	9,341,059	648,219	970,798	1,561,886
Exports	Electronic products	506,604	2,145,511	920,558	1,777,310	865,748
Imports	Electronic products	5,250	16,791	12,255	133,515	7,700
Exports	Energy related products	148,884	181,176	33,503	8,267	1,900,773
Imports	Energy related products	-	-	-	156,555	-
Exports	Footwear	5,381	-	50,518	265,916	257,909
Exports	Forest products	183,548	1,381,637	264,544	233,070	559,337
Imports	Forest products	29,301	13,016	-	31,994	-
Exports	Machinery	805,513	2,978,654	558,341	475,225	429,008
Imports	Machinery	8,544	-	15,000	1,944	85,303
Exports	Minerals & metals	239,564	309,888	120,094	214,316	57,854
Imports	Minerals & metals	2,315,422	2,748,430	2,088,747	2,122,829	7,986,506
Exports	Miscellaneous manufactures	108,699	281,935	446,022	219,721	138,135
Imports	Miscellaneous manufactures	223,628	30,000	115,197	1,500	22,800
Exports	Special provisions	4,498,075	2,591,521	874,734	3,294,869	3,792,337
Imports	Special provisions	55,732	46,369	137,414	19,666	43,104
Exports	Textile & apparel	223,924	1,567,159	1,202,052	2,071,996	1,631,973
Imports	Textile & apparel	-	540	44,506	-	-
Exports	Transportation equipment	1,819,118	2,291,358	748,904	622,490	1,117,974
Imports	Transportation equipment	16,692	26,950	22,783	29,198	18,648
	Total export value	46,915,468	30,420,875	20,002,841	46,210,274	41,552,321
	Total import value	9,323,992	12,223,155	3,084,121	3,470,749	9,728,359
	Total import (GSP) value	-	-	-	-	-

Source: U.S. Department of Commerce, Bureau of the Census.

MADAGASCAR						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$7,569,995	$2,381,569	$3,657,197	$2,213,907	$2,860,275
Imports	Agriculture	42,019,340	48,219,566	36,051,726	47,108,006	38,484,220
GSP imports	Agriculture	3,158,418	5,763,949	49,000	5,894,376	3,325,815
Exports	Chemicals & related products	183,883	586,890	148,369	121,276	295,523
Imports	Chemicals & related products	615,229	675,581	713,209	1,000,133	941,401
Exports	Electronic products	768,414	1,229,073	1,650,238	5,692,314	1,807,025
Imports	Electronic products	10,994	9,416	1,760	127,914	664,574
GSP imports	Electronic products	-	-	-	87,410	614,211
Exports	Energy related products	27,418	30,850	-	125,288	35,360
Exports	Footwear	-	-	-	2,671	-
Exports	Forest products	327,368	7,157	13,080	195,628	104,153
Imports	Forest products	341,894	251,176	407,157	881,688	3,064,451
GSP imports	Forest products	294,523	196,748	312,105	771,551	1,765,537
Exports	Machinery	1,605,845	406,384	377,059	1,085,155	681,285
Imports	Machinery	-	10,987	-	-	-
Exports	Minerals & metals	169,990	29,348	86,782	198,445	143,375
Imports	Minerals & metals	3,034,311	3,276,822	2,797,998	3,070,364	3,090,899
GSP imports	Minerals & metals	37,528	25,722	470,670	339,879	79,004
Exports	Miscellaneous manufactures	7,327	106,951	2,714,995	102,794	45,476
Imports	Miscellaneous manufactures	121,862	171,344	306,629	855,180	651,540
GSP imports	Miscellaneous manufactures	100,607	141,759	79,710	108,383	18,591
Exports	Special provisions	1,651,712	648,419	1,166,034	381,810	237,026
Imports	Special provisions	76,786	62,091	89,401	161,874	2,448,625
Exports	Textile & apparel	29,696	51,003	25,355	21,714	465,358
Imports	Textile & apparel	400,201	826,066	2,343,020	3,514,104	7,887,754
GSP imports	Textile & apparel	-	28,154	426,371	565,544	875,155
Exports	Transportation equipment	1,743,298	593,902	976,343	37,138,377	2,826,877
Imports	Transportation equipment	1,351	-	-	-	5,000
Total export value		14,084,946	6,071,546	10,815,452	47,279,379	9,501,733
Total import value		46,621,968	53,503,049	42,710,900	56,719,263	57,238,464
Total import (GSP) value		3,591,076	6,156,332	1,337,856	7,767,143	6,678,313

Source: U.S. Department of Commerce, Bureau of the Census.

MALAWI						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$8,289,658	$1,961,882	$6,234,759	$3,594,803	$7,583,028
Imports	Agriculture	44,201,880	47,555,221	75,974,868	44,235,219	36,342,316
GSP imports	Agriculture	5,361,976	368,278	4,705,410	3,944,089	284,706
Exports	Chemicals & related products	1,193,492	955,113	694,516	432,318	991,255
Exports	Electronic products	1,766,800	2,589,490	1,545,375	1,439,653	3,559,624
Imports	Electronic products	3,764	-	-	2,000	74,085
GSP imports	Electronic products	-	-	-	2,000	-
Exports	Energy related products	-	-	-	-	25,582
Exports	Forest products	994,251	746,360	1,328,844	1,291,544	416,251
Imports	Forest products	9,936	325,759	18,590	1,384	34,221
GSP imports	Forest products	9,936	313,233	13,648	-	18,287
Exports	Machinery	1,331,539	1,091,600	2,990,126	4,707,549	766,980
Exports	Minerals & metals	352,198	183,952	313,507	205,816	32,560
Imports	Minerals & metals	9,540	-	5,649	5,941	17,976
GSP imports	Minerals & metals	7,237	-	5,649	-	-
Exports	Miscellaneous manufactures	23,912	8,106	3,670	-	60,586
Imports	Miscellaneous manufactures	95,678	70,590	37,180	58,799	80,923
GSP imports	Miscellaneous manufactures	40,008	6,307	6,223	5,237	3,037
Exports	Special provisions	2,933,114	1,104,051	1,520,032	3,353,026	3,412,022
Imports	Special provisions	70,756	705,827	26,770	18,925	39,633
Exports	Textile & apparel	26,688	146,251	68,010	353,097	492,315
Imports	Textile & apparel	5,679,572	7,761,875	8,176,136	3,766,384	2,265,052
GSP imports	Textile & apparel	-	-	-	-	300
Exports	Transportation equipment	37,004,682	4,784,428	1,119,147	3,279,390	470,009
Total export value		53,916,334	13,571,233	15,817,986	18,657,196	17,810,212
Total import value		50,071,126	56,419,272	84,239,193	48,088,652	38,854,206
Total import (GSP) value		5,419,157	687,818	4,730,930	3,951,326	306,330

Source: U.S. Department of Commerce, Bureau of the Census.

MALI						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$11,718,157	$5,840,597	$1,809,665	$494,035	$2,052,020
Imports	Agriculture	321,279	151,698	118,640	321,763	179,334
GSP imports	Agriculture	12,559	-	92,104	20,417	13,950
Exports	Chemicals & related products	865,760	1,079,124	1,180,281	2,419,887	1,405,817
Imports	Chemicals & related products	10,376	418,793	49,513	42,946	80,307
GSP imports	Chemicals & related products	10,376	-	-	17,710	22,722
Exports	Electronic products	1,198,038	1,257,197	2,061,661	987,913	2,761,066
Imports	Electronic products	194,841	178,784	194,685	1,153,486	2,451,840
GSP imports	Electronic products	-	-	9,664	77,250	11,209
Exports	Energy related products	-	-	-	-	31,200
Exports	Footwear	20,219	0	30,106	-	33,228
Exports	Forest products	73,351	69,924	334,604	11,610	273,648
Imports	Forest products	173,053	242,585	211,794	146,331	55,926
GSP imports	Forest products	79,261	184,295	194,414	117,053	51,476
Exports	Machinery	1,003,159	242,451	10,865,906	8,271,251	10,847,815
Imports	Machinery	5,722	13,421	204,144	-	562,148
GSP imports	Machinery	-	2,235	-	-	347,477
Exports	Minerals & metals	51,466	48,546	3,633,627	582,800	109,426
Imports	Minerals & metals	71,704	18,628	42,447	204,312	66,004
GSP imports	Minerals & metals	6,788	1,824	33,989	3,538	3,401
Exports	Miscellaneous manufactures	82,243	23,008	417,249	782,011	87,909
Imports	Miscellaneous manufactures	344,475	328,463	141,824	1,138,566	322,103
GSP imports	Miscellaneous manufactures	22,498	51,872	35,140	63,786	41,097
Exports	Special provisions	398,740	349,967	469,420	421,814	524,474
Imports	Special provisions	100,268	80,314	118,530	851,894	716,587
Exports	Textile & apparel	1,428,691	1,554,387	1,860,871	1,699,024	2,941,010
Imports	Textile & apparel	211,419	136,852	176,153	187,278	1,042,765
GSP imports	Textile & apparel	882	365	1,523	7,540	283,804
Exports	Transportation equipment	1,474,777	700,914	9,814,875	3,338,750	2,050,195
Imports	Transportation equipment	-	-	120,691	26,236	17,510
GSP imports	Transportation equipment	-	-	-	26,236	-
Total export value		18,314,601	11,166,115	32,478,265	19,009,095	23,117,808
Total import value		1,433,137	1,569,538	1,378,421	4,072,812	5,494,524
Total import (GSP) value		132,364	240,591	366,834	333,530	775,136

Source: U.S. Department of Commerce, Bureau of the Census.

MAURITANIA						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$6,877,368	$7,643,708	$4,380,588	$5,791,364	$27,504,970
Imports	Agriculture	318,472	54,991	13,430	-	-
GSP imports	Agriculture	318,472	-	-	-	-
Exports	Chemicals & related products	255,090	469,132	213,327	821,414	252,949
Imports	Chemicals & related products	1,842	-	-	-	-
Exports	Electronic products	343,062	437,901	614,071	639,600	8,182,369
Imports	Electronic products	4,022	3,700	15,992	59,955	2,754
GSP imports	Electronic products	2,160	-	-	-	-
Exports	Energy related products	-	61,044	61,237	21,698	29,240
Imports	Energy related products	-	-	1,975,814	1,239,506	-
Imports	Footwear	-	-	423	-	-
Exports	Forest products	23,962	-	4,400	13,512	-
Exports	Machinery	1,226,739	4,879,564	446,798	1,278,745	1,788,133
Exports	Minerals & metals	128,317	285,505	4,379,375	1,390,160	1,699,312
Imports	Minerals & metals	10,058,668	6,200,137	3,746,689	2,192,331	5,523,162
Exports	Miscellaneous manufactures	973,303	5,120	-	-	-
Imports	Miscellaneous manufactures	-	-	-	11,193	-
GSP imports	Miscellaneous manufactures	-	-	-	11,193	-
Exports	Special provisions	716,698	571,887	231,295	565,116	515,288
Imports	Special provisions	1,036,494	2,115,035	605,418	1,002	14,412
Exports	Textile & apparel	13,155	28,040	79,046	78,266	-
Imports	Textile & apparel	-	165,474	93,723	13,151	-
Exports	Transportation equipment	11,018,582	44,049,910	8,760,250	3,343,575	2,966,662
Total export value		21,576,276	58,431,811	19,170,387	13,943,450	42,938,923
Total import value		11,419,498	8,539,337	6,451,489	3,517,138	5,540,328
Total import (GSP) value		320,632	-	-	11,193	-

Source: U.S. Department of Commerce, Bureau of the Census.

MAURITIUS						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$485,165	$788,702	$900,750	$510,461	$516,009
Imports	Agriculture	18,003,902	2,534,127	14,512,253	10,540,626	10,646,976
GSP imports	Agriculture	13,557,449	917,695	10,897,343	8,836,881	3,160,340
Exports	Chemicals & related products	748,776	1,181,599	530,142	992,013	1,251,968
Imports	Chemicals & related products	994,141	1,915,535	89,337	129,563	296,170
GSP imports	Chemicals & related products	33,294	8,911	8,529	61,858	-
Exports	Electronic products	4,421,995	5,412,222	3,459,781	4,098,708	8,133,253
Imports	Electronic products	6,589,285	9,757,863	11,827,098	10,903,406	15,888,356
GSP imports	Electronic products	3,712,181	4,006,105	4,659,509	4,829,703	5,677,730
Exports	Energy related products	56,083	158,469	164,865	850,206	35,989
Imports	Energy related products	1,400	-	-	-	-
Imports	Footwear	144,274	32,431	412,264	24,245	68,118
Exports	Forest products	435,305	864,552	948,994	733,950	1,227,681
Imports	Forest products	116,053	277,713	54,582	114,889	464,359
GSP imports	Forest products	16,176	90,162	20,277	51,645	18,660
Exports	Machinery	3,560,907	4,993,086	3,577,211	8,250,805	3,318,030
Imports	Machinery	501,058	207,028	386,290	994,934	1,620,281
GSP imports	Machinery	-	43,465	-	-	-
Exports	Minerals & metals	271,586	463,345	889,295	381,270	697,300
Imports	Minerals & metals	1,365,103	1,718,309	1,740,796	3,552,812	4,601,988
GSP imports	Minerals & metals	89,993	172,929	150,103	107,402	102,887
Exports	Miscellaneous manufactures	1,003,194	891,962	716,764	470,948	1,091,864
Imports	Miscellaneous manufactures	3,278,582	4,533,587	3,988,420	2,110,973	3,792,709
GSP imports	Miscellaneous manufactures	2,252,459	2,143,691	2,433,939	1,789,166	1,501,698
Exports	Special provisions	440,419	640,891	678,282	866,676	841,518
Imports	Special provisions	782,999	453,408	858,789	835,808	813,539
Exports	Textile & apparel	392,877	861,891	1,019,649	1,125,543	1,355,650
Imports	Textile & apparel	99,495,903	115,347,500	162,338,875	187,298,157	191,034,204
GSP imports	Textile & apparel	600	2,250	-	6,069	14,314
Exports	Transportation equipment	2,068,908	2,832,637	2,080,763	706,113	971,497
Imports	Transportation equipment	133,287	69,783	230,904	263,504	367,153
Total export value		13,885,215	19,089,356	14,966,496	18,986,693	19,440,759
Total import value		131,405,987	136,847,284	196,439,608	216,768,917	229,593,853
Total import (GSP) value		19,662,152	7,385,208	18,169,700	15,682,724	10,475,629

Source: U.S. Department of Commerce, Bureau of the Census.

MOZAMBIQUE						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$21,869,587	$69,543,224	$24,768,060	$19,482,602	$28,347,190
Imports	Agriculture	21,536,629	18,507,465	6,581,489	19,762,791	23,993,493
GSP imports	Agriculture	9,764,975	7,265,073	-	17,156,461	20,082,991
Exports	Chemicals & related products	524,161	1,964,640	1,625,225	1,848,126	1,505,489
Imports	Chemicals & related products	-	60,149	820	-	238,800
GSP imports	Chemicals & related products	-	60,149	-	-	-
Exports	Electronic products	6,351,015	2,540,933	3,269,093	4,381,355	1,800,571
Imports	Electronic products	97,487	33,727	-	5,745	15,111
Exports	Energy related products	99,864	17,310	54,720	38,349	41,405
Imports	Energy related products	2,798	-	-	-	1,416,682
Exports	Footwear	-	5,347	-	-	-
Imports	Footwear	-	33,879	-	-	-
Exports	Forest products	53,500	32,849	19,191	141,552	188,845
Imports	Forest products	11,750	-	35,293	20,583	-
Exports	Machinery	1,804,919	1,167,345	2,154,547	2,106,571	1,106,342
Imports	Machinery	25,360	32,099	21,387	-	-
Exports	Minerals & metals	618,367	84,842	138,087	193,400	1,174,939
Imports	Minerals & metals	110,797	93,007	107,835	147,202	927,458
GSP imports	Minerals & metals	108,969	93,007	106,505	64,582	7,062
Exports	Miscellaneous manufactures	145,524	7,494	66,567	10,694	34,548
Imports	Miscellaneous manufactures	10,700	28,737	3,850	165,281	1,536
GSP imports	Miscellaneous manufactures	-	1,950	-	-	-
Exports	Special provisions	3,063,536	1,197,843	1,049,041	1,339,853	1,449,799
Imports	Special provisions	290,763	305,419	169,928	218,998	655,266
Exports	Textile & apparel	2,073,829	792,776	3,889,033	2,749,458	3,512,942
Imports	Textile & apparel	599,167	78,061	1,425,187	464,547	281,709
Exports	Transportation equipment	64,251,672	72,276,357	2,332,848	6,979,844	9,841,735
Imports	Transportation equipment	-	196,719	4,250	10,999	13,573
Total export value		100,855,974	149,630,960	39,366,412	39,271,804	49,003,805
Total import value		22,685,451	19,369,262	8,350,039	20,796,146	27,543,628
Total import (GSP) value		9,873,944	7,420,179	106,505	17,221,043	20,090,053

Source: U.S. Department of Commerce, Bureau of the Census.

	NAMIBIA					
	Sector	1991	1992	1993	1994	1995
Exports	Agriculture	$145,436	$2,405,323	$9,589,912	$1,161,214	$4,648,641
Imports	Agriculture	2,954,754	5,077,296	7,635,583	5,238,243	3,738,397
GSP imports	Agriculture	292,500	3,203,931	3,582,525	1,908,699	1,538,019
Exports	Chemicals & related products	147,475	168,920	339,501	368,134	353,958
Imports	Chemicals & related products	14,188	19,081	10,742	59,538	11,758
GSP imports	Chemicals & related products	-	17,333	-	-	-
Exports	Electronic products	1,489,865	1,788,871	3,794,445	5,297,565	2,470,761
Imports	Electronic products	4,041	406,700	8,752	119,303	17,437
Exports	Energy related products	346,560	10,623	-	-	24,245
Imports	Energy related products	30,507,360	31,831,710	9,054,666	15,436,365	5,818,587
Imports	Footwear	2,226	1,650	-	17,861	-
Exports	Forest products	72,227	50,595	197,064	34,464	65,162
Imports	Forest products	-	4,038	1,281	166,513	478,884
GSP imports	Forest products	-	-	-	3,465	16,164
Exports	Machinery	8,779,069	4,795,845	177,930	492,541	1,437,281
Imports	Machinery	-	2,453	1,402	4,282	37,278
GSP imports	Machinery	-	-	-	-	22,090
Exports	Minerals & metals	58,780	28,517	67,383	76,704	335,934
Imports	Minerals & metals	249,218	8,947,048	934,472	8,088,998	322,414
GSP imports	Minerals & metals	-	8,230,775	-	4,557,765	-
Exports	Miscellaneous manufactures	11,340	108,805	49,196	206,129	406,382
Imports	Miscellaneous manufactures	106,022	98,099	445,026	21,349	11,056
GSP imports	Miscellaneous manufactures	-	5,930	-	-	-
Exports	Special provisions	3,693,379	3,375,830	1,595,846	2,885,777	4,360,008
Imports	Special provisions	1,425,051	2,167,849	3,862,725	800,303	962,999
Exports	Textile & apparel	42,413	87,495	92,008	173,308	130,452
Imports	Textile & apparel	185,058	39,103	61,075	117,331	50,820
GSP imports	Textile & apparel	11,404	21,339	3,002	-	21,400
Exports	Transportation equipment	17,522,344	20,871,328	3,694,284	5,492,524	12,299,537
Imports	Transportation equipment	-	-	11,923	106,119	-
Total export value		32,308,888	33,692,152	19,597,569	16,188,360	26,532,361
Total import value		35,447,918	48,595,027	22,027,647	30,176,205	11,449,630
Total import (GSP) value		303,904	11,479,308	3,585,527	6,469,929	1,597,673

Source: U.S. Department of Commerce, Bureau of the Census.

NIGER						
Sector		**1991**	**1992**	**1993**	**1994**	**1995**
Exports	Agriculture	$4,333,325	$2,818,919	$2,016,419	$1,078,391	$2,076,735
Imports	Agriculture	42,958	19,886	141,276	807,767	345,274
Exports	Chemicals & related products	1,096,598	2,317,213	4,274,971	1,840,052	243,866
Imports	Chemicals & related products	246,936	620,240	1,079,030	62,223	136,418
Exports	Electronic products	682,327	1,709,239	1,217,968	1,067,393	907,911
Imports	Electronic products	767,360	129,275	416,995	33,258	90,499
Exports	Energy related products	-	22,500	-	-	13,280
Imports	Energy related products	1,474,200	-	2,489,513	1,948,043	-
Exports	Footwear	2,698	6,165	31,646	12,985	-
Imports	Footwear	-	-	-	360	405
Exports	Forest products	10,538	266,026	192,422	289,195	97,952
Imports	Forest products	248,702	327,501	-	8,130	8,004
Exports	Machinery	848,722	278,925	2,909,957	326,317	169,445
Imports	Machinery	86,609	262,278	146,564	188,044	92,395
Exports	Minerals & metals	173,832	111,882	144,300	78,226	50,376
Imports	Minerals & metals	54,961	37,850	20,803	12,612	10,305
Exports	Miscellaneous manufactures	47,958	91,025	70,991	124,748	347,316
Imports	Miscellaneous manufactures	25,038	414,974	42,886	313,742	462,994
GSP imports	Miscellaneous manufactures	17,324	-	15,175	14,400	13,850
Exports	Special provisions	809,906	1,019,305	969,012	457,295	968,175
Imports	Special provisions	1,553,329	1,033,112	942,523	152,810	58,642
Exports	Textile & apparel	1,848,765	2,854,578	2,071,611	4,972,232	10,457,962
Imports	Textile & apparel	49,778	25,076	408,003	540,831	279,623
GSP imports	Textile & apparel	-	-	-	1,940	-
Exports	Transportation equipment	472,477	1,053,116	1,913,526	1,658,521	1,790,312
Imports	Transportation equipment	318,157	13,956	28,274	191,840	66,152
Total export value		10,327,146	12,548,893	15,812,823	11,905,355	17,123,330
Total import value		4,868,028	2,884,148	5,715,867	4,259,660	1,550,711
Total import (GSP) value		17,324	-	15,175	16,340	13,850

Source: U.S. Department of Commerce, Bureau of the Census.

NIGERIA						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$35,588,684	$68,617,907	$141,634,429	$68,772,469	$117,191,717
Imports	Agriculture	31,739,309	20,693,974	33,203,361	30,200,624	17,706,165
Exports	Chemicals & related products	105,236,276	91,866,747	68,248,004	36,376,964	83,359,247
Imports	Chemicals & related products	12,785,749	16,189,760	30,071,232	27,620,899	68,825,237
Exports	Electronic products	62,686,598	83,514,331	85,098,033	37,689,236	50,445,497
Imports	Electronic products	228,893	80,369	96,892	52,579	78,580
Exports	Energy related products	14,825,792	18,205,566	36,718,360	2,741,034	19,417,430
Imports	Energy related products	5,321,193,423	5,026,406,963	5,230,546,570	4,529,937,977	4,783,682,565
Exports	Footwear	161,216	495,781	323,791	199,908	214,312
Imports	Footwear	-	-	19,444	704	18,444
Exports	Forest products	13,624,213	14,351,777	9,059,871	6,697,975	19,427,034
Imports	Forest products	1,229,063	884,501	2,007,496	437,699	482,036
Exports	Machinery	87,540,940	179,313,585	162,301,878	95,814,257	58,921,657
Imports	Machinery	-	15,561	1,861	-	3,344
Exports	Minerals & metals	48,775,402	53,333,478	43,010,090	21,868,385	40,559,232
Imports	Minerals & metals	589,332	945,899	384,037	174,634	2,335,460
Exports	Miscellaneous manufactures	6,467,414	7,001,862	10,502,889	2,590,865	2,583,502
Imports	Miscellaneous manufactures	414,126	325,780	576,037	1,249,250	576,692
Exports	Special provisions	13,147,182	13,368,112	14,258,490	8,441,752	7,417,855
Imports	Special provisions	2,430,698	2,735,473	11,560,022	4,476,628	2,786,808
Exports	Textile & apparel	17,598,988	21,623,225	21,241,871	16,359,471	15,813,690
Imports	Textile & apparel	3,011,526	1,504,128	786,629	1,041,412	1,820,177
Exports	Transportation equipment	418,435,308	428,459,856	282,807,981	203,035,030	174,398,367
Imports	Transportation equipment	81,295	1,418,233	216,716	172,092	164,500
Total export value		824,088,013	980,152,227	875,205,687	500,587,346	589,749,540
Total import value		5,373,703,414	5,071,200,641	5,309,470,297	4,595,364,498	4,878,480,008
Total import (GSP) value		-	-	-	-	-

Source: U.S. Department of Commerce, Bureau of the Census.

RWANDA						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$0	$7,700	$5,315,646	$30,366,838	$32,188,149
Imports	Agriculture	5,657,575	2,435,196	576,070	162,931	832,173
Exports	Chemicals & related products	189,437	542,433	474,832	139,598	537,212
Imports	Chemicals & related products	206,309	-	5,000	-	-
Exports	Electronic products	455,672	365,046	293,488	1,913,576	1,771,022
Imports	Electronic products	1,723	1,800	-	66,947	2,398
Exports	Footwear	-	-	-	-	6,046
Exports	Forest products	-	5,318	23,388	2,576	1,638,298
Imports	Forest products	14,840	-	-	4,145	-
GSP imports	Forest products	14,840	-	-	-	-
Exports	Machinery	13,541	86,362	11,147	822,349	241,061
Imports	Machinery	-	2,847	-	-	-
Exports	Minerals & metals	4,752	3,498	36,817	-	128,835
Imports	Minerals & metals	891,822	2,346,815	3,501,705	1,412,545	597,654
GSP imports	Minerals & metals	839,963	221,583	366,374	-	-
Exports	Miscellaneous manufactures	10,300	-	9,690	-	36,104
Imports	Miscellaneous manufactures	464,324	-	-	8,626	1,300
GSP imports	Miscellaneous manufactures	1,335	-	-	-	-
Exports	Special provisions	338,779	372,313	279,440	1,221,005	1,629,807
Imports	Special provisions	24,379	17,458	11,214	7,368	446,669
Exports	Textile & apparel	181,451	1,052,598	483,669	24,356	186,849
Imports	Textile & apparel	1,404	600	-	-	-
Exports	Transportation equipment	107,906	13,041	91,693	109,205	97,694
Imports	Transportation equipment	5,127	-	-	-	-
Total export value		1,301,838	2,448,309	7,019,810	34,599,503	38,461,077
Total import value		7,267,503	4,804,716	4,093,989	1,662,562	1,880,194
Total import (GSP) value		856,138	221,583	366,374	-	-

Source: U.S. Department of Commerce, Bureau of the Census.

SAO TOME & PRINCIPE						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$264,308	$531,480	$108,192	$219,964	$518,783
Imports	Agriculture	-	4,661	12,644	-	-
Exports	Chemicals & related products	173,700	91,940	74,871	8,183	47,391
Imports	Chemicals & related products	-	13,932	-	3,100	-
Exports	Electronic products	27,609	109,275	1,022,647	2,712,719	563,173
Imports	Electronic products	-	345,214	74,247	1,970	2,484
Exports	Energy related products	-	3,960	-	9,431	-
Exports	Forest products	31,300	56,300	20,198	341,504	-
Imports	Forest products	-	-	3,482	23,950	30,068
Exports	Machinery	-	431,514	292,361	3,135,037	91,997
Exports	Minerals & metals	-	37,450	86,148	1,067,595	62,692
Exports	Miscellaneous manufactures	-	-	-	371,761	2,928
Imports	Miscellaneous manufactures	-	29,265	-	-	-
Exports	Special provisions	772,826	701,016	769,762	265,436	98,153
Imports	Special provisions	-	5,668	515,681	5,000	42,632
Exports	Textile & apparel	10,507	-	-	-	-
Imports	Textile & apparel	883	-	69,001	-	64,383
Exports	Transportation equipment	3,161,443	720,360	137,747	4,892,582	438,789
Imports	Transportation equipment	-	2,713	-	4,814	4,892
Total export value		4,441,693	2,683,295	2,511,926	13,024,212	1,823,906
Total import value		883	401,453	675,055	38,834	144,459
Total import (GSP) value		-	-	-	-	-

Source: U.S. Department of Commerce, Bureau of the Census.

SENEGAL						
	Sector	1991	1992	1993	1994	1995
Exports	Agriculture	$28,570,875	$24,079,589	$41,442,012	$16,645,358	$14,215,178
Imports	Agriculture	3,128,489	2,133,369	495,212	1,187,708	1,171,968
GSP imports	Agriculture	1,890,810	1,220,187	295,628	1,066,293	971,308
Exports	Chemicals & related products	11,673,807	16,884,336	5,686,233	7,567,046	15,040,912
Imports	Chemicals & related products	1,449	17,349	6,001	503,116	1,485,275
Exports	Electronic products	10,278,004	9,294,861	2,476,582	2,694,023	3,934,329
Imports	Electronic products	646,296	916,221	396,494	578,707	1,416,168
GSP imports	Electronic products	3,740	119,154	9,080	23,572	-
Exports	Energy related products	89,072	149,667	129,640	1,584,270	340,944
Imports	Energy related products	2,975,952	2,397,225	2,702,665	2,675,619	-
Exports	Footwear	83,827	13,745	92,860	-	5,240
Imports	Footwear	-	18,441	2,290	275	846
Exports	Forest products	613,835	711,907	100,771	357,272	1,468,398
Imports	Forest products	75,050	901,589	11,724	56,624	13,248
GSP imports	Forest products	2,940	4,803	6,360	7,562	9,146
Exports	Machinery	5,796,161	5,757,331	3,581,427	2,637,751	4,033,511
Imports	Machinery	1,310,291	95,015	67,766	69,705	70,765
GSP imports	Machinery	-	-	-	28,672	-
Exports	Minerals & metals	72,373	175,835	433,961	54,955	355,395
Imports	Minerals & metals	1,305,582	16,667	-	26,896	2,007
GSP imports	Minerals & metals	7,908	5,255	-	-	2,007
Exports	Miscellaneous manufactures	1,229,746	420,706	241,064	113,454	303,423
Imports	Miscellaneous manufactures	662,631	1,074,756	998,294	1,636,930	501,280
GSP imports	Miscellaneous manufactures	485,264	1,045,261	397,202	249,881	167,129
Exports	Special provisions	2,172,973	4,342,341	5,389,085	2,096,458	1,822,028
Imports	Special provisions	867,329	1,081,206	1,258,338	4,611,397	1,181,371
Exports	Textile & apparel	3,816,157	6,246,847	3,740,602	2,689,570	3,515,046
Imports	Textile & apparel	684,120	1,516,669	1,517,793	72,743	629,010
GSP imports	Textile & apparel	-	954	-	-	4,214
Exports	Transportation equipment	11,366,127	8,758,561	5,589,753	5,741,125	22,053,516
Imports	Transportation equipment	-	21,201	39,719	9,076	4,374
Total export value		75,762,957	76,835,726	68,903,990	42,181,282	67,087,920
Total import value		11,657,189	10,189,708	7,496,296	11,428,796	6,476,312
Total import (GSP) value		2,390,662	2,395,614	708,270	1,375,980	1,153,804

Source: U.S. Department of Commerce, Bureau of the Census.

SEYCHELLES						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$160,887	$139,610	$90,694	$151,099	$245,753
Imports	Agriculture	83,315	116,052	64,618	237,390	58,735
Exports	Chemicals & related products	25,905	40,232	140,559	202,817	125,928
Imports	Chemicals & related products	24,439	22,516	2,728	126,189	-
Exports	Electronic products	829,514	1,281,314	5,557,346	3,659,080	3,509,133
Imports	Electronic products	213,001	4,735	19,825	842,440	636,088
GSP imports	Electronic products	2,794	-	-	-	-
Exports	Forest products	24,810	19,169	30,199	2,650	23,118
Imports	Forest products	-	42,724	-	15,210	-
Exports	Machinery	408,120	177,179	116,078	209,516	1,426,259
Imports	Machinery	8,169	416,140	60,922	32,000	2,592
Exports	Minerals & metals	39,794	52,009	230,900	114,445	54,626
Imports	Minerals & metals	2,596	-	5,110	1,902	155,060
GSP imports	Minerals & metals	-	-	-	-	24,595
Exports	Miscellaneous manufactures	91,589	21,135	211,017	248,310	1,115,511
Imports	Miscellaneous manufactures	6,682	-	154,444	2,700	30,473
Exports	Special provisions	146,292	186,037	618,051	185,990	218,808
Imports	Special provisions	511,883	454,080	4,128,938	2,108,975	1,520,657
Exports	Textile & apparel	5,408	19,626	27,603	-	7,580
Imports	Textile & apparel	203,418	142,162	48,060	14,952	26,920
GSP imports	Textile & apparel	-	-	-	-	1,968
Exports	Transportation equipment	125,440	310,406	57,452,311	1,280,421	144,386
Imports	Transportation equipment	16,320	-	-	-	-
Total export value		1,857,759	2,246,717	64,474,758	6,054,328	6,871,102
Total import value		1,069,823	1,198,409	4,484,645	3,381,758	2,430,525
Total import (GSP) value		2,794	-	-	-	26,563

Source: U.S. Department of Commerce, Bureau of the Census.

SIERRA LEONE						
	Sector	1991	1992	1993	1994	1995
Exports	Agriculture	$7,058,894	$14,070,127	$6,652,726	$10,037,083	$10,326,950
Imports	Agriculture	740,463	1,481,076	1,562,200	364,416	2,475,503
GSP imports	Agriculture	37,708	68,230	39,795	56,957	37,533
Exports	Chemicals & related products	1,890,196	1,233,836	1,068,331	943,999	557,323
Imports	Chemicals & related products	-	520,460	1,288,954	1,568,446	529,250
GSP imports	Chemicals & related products	-	434,961	686,934	1,562,636	415,309
Exports	Electronic products	932,285	878,876	749,944	1,012,308	500,694
Imports	Electronic products	-	8,730	10,048	1,750	38,830
Exports	Energy related products	258,516	513,759	310,314	672,641	4,980
Exports	Footwear	7,500	22,136	136,389	281,562	108,968
Imports	Footwear	1,500	949,107	900,735	-	6,589
Exports	Forest products	94,636	29,048	119,781	90,288	51,340
Imports	Forest products	-	4,599	92,433	49,832	1,723
GSP imports	Forest products	-	3,000	-	3,830	1,723
Exports	Machinery	3,853,279	3,250,718	2,602,682	3,183,764	1,184,708
Imports	Machinery	-	575,775	43,466	4,022,272	445,694
GSP imports	Machinery	-	334,248	43,466	3,992,424	441,567
Exports	Minerals & metals	1,309,727	990,297	578,625	2,348,102	211,738
Imports	Minerals & metals	46,887,481	55,884,273	42,875,433	44,816,606	23,954,184
GSP imports	Minerals & metals	-	41,593	410,053	121,658	28,465
Exports	Miscellaneous manufactures	167,744	75,388	112,248	265,148	40,256
Imports	Miscellaneous manufactures	23,190	1,329,494	365,929	300,400	457,615
GSP imports	Miscellaneous manufactures	5,000	482,510	180,735	232,229	378,918
Exports	Special provisions	2,954,364	3,317,583	2,054,103	1,531,821	1,022,023
Imports	Special provisions	101,319	81,822	22,297	24,691	93,071
Exports	Textile & apparel	3,042,531	2,704,661	3,860,775	2,803,382	3,366,917
Imports	Textile & apparel	305	11,598	58,769	66,271	462,109
Exports	Transportation equipment	1,945,475	902,012	2,301,405	894,390	493,494
Imports	Transportation equipment	-	6,009	104,924	254,203	13,243
	Total export value	23,515,147	27,988,441	20,547,323	24,064,488	17,869,391
	Total import value	47,754,258	60,852,943	47,325,188	51,468,887	28,477,811
	Total import (GSP) value	42,708	1,364,542	1,360,983	5,969,734	1,303,515

Source: U.S. Department of Commerce, Bureau of the Census.

SOMALIA						
	Sector	**1991**	**1992**	**1993**	**1994**	**1995**
Exports	Agriculture	$3,849,934	$19,610,279	$10,893,513	$15,601,378	$5,903,154
Imports	Agriculture	2,503,495	2,411,335	61,224	65,872	38,496
Exports	Chemicals & related products	38,412	-	128,781	332,604	1,044,388
Imports	Chemicals & related products	-	3,700	11,327	1,589	-
Exports	Electronic products	31,598	975,691	9,001,354	1,625,664	149,145
Imports	Electronic products	81,960	-	27,794	17,051	5,360
Exports	Energy related products	-	-	19,802	-	-
Imports	Footwear	-	-	34,120	14,307	-
Exports	Forest products	239,622	-	9,738	15,677	-
Exports	Machinery	20,306	11,107	1,701,941	4,095,219	94,640
Imports	Machinery	15,519	-	-	-	3,500
GSP imports	Machinery	15,519	-	-	-	-
Exports	Minerals & metals	-	51,303	357,985	67,705	25,395
Imports	Minerals & metals	-	-	-	-	1,343
Exports	Miscellaneous manufactures	2,404,427	7,900	2,632	2,460,230	-
Imports	Miscellaneous manufactures	-	1,616	-	409	40,000
Exports	Special provisions	604,155	141,867	4,877,077	731,152	130,461
Imports	Special provisions	146,277	6,696	72,058	11,974	15,785
Exports	Textile & apparel	19,310	14,500	174,893	31,233	348,956
Imports	Textile & apparel	5,155	2,230	2,998	-	1,490
Exports	Transportation equipment	142,589	6,795	3,393,665	4,800,827	358,611
Imports	Transportation equipment	-	-	2,500	6,372	-
	Total export value	7,350,353	20,819,442	30,561,381	29,761,689	8,054,750
	Total import value	2,752,406	2,425,577	212,021	117,574	105,974
	Total import (GSP) value	15,519	-	-	-	-

Source: U.S. Department of Commerce, Bureau of the Census.

SOUTH AFRICA						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$83,959,660	$472,742,562	$250,137,207	$158,396,940	$278,112,11
Imports	Agriculture	6,520,907	66,686,751	97,028,807	119,160,751	138,808,659
GSP imports	Agriculture	-	-	-	16,636,573	24,545,678
Exports	Chemicals & related	314,522,451	303,120,109	277,113,841	325,700,636	440,189,254
Imports	Chemicals & related	52,971,136	64,525,949	73,306,086	92,612,884	117,060,228
GSP imports	Chemicals & related	-	-	-	26,959,410	57,251,950
Exports	Electronic products	360,564,541	380,510,977	417,934,612	474,378,632	530,582,234
Imports	Electronic products	1,768,359	2,725,429	4,249,625	9,582,714	11,944,454
GSP imports	Electronic products	-	-	-	2,608,761	5,648,935
Exports	Energy related products	74,661,299	77,829,271	70,932,303	91,636,215	107,149,182
Imports	Energy related products	4,582,928	33,384,837	32,335,898	23,733,099	31,999,433
Exports	Footwear	1,312,826	2,146,175	3,265,100	6,448,975	4,432,060
Imports	Footwear	356,872	627,412	1,195,124	2,443,457	716,933
GSP imports	Footwear	-	-	-	115,388	58,119
Exports	Forest products	123,101,827	125,902,432	133,438,856	129,213,674	147,918,988
Imports	Forest products	57,058,092	54,779,401	48,600,421	53,899,441	63,084,956
GSP imports	Forest products	-	-	-	6,304,731	7,962,262
Exports	Machinery	250,561,867	280,746,391	266,805,663	315,651,219	366,256,154
Imports	Machinery	33,289,058	31,068,562	33,125,107	37,028,012	49,197,081
GSP imports	Machinery	-	-	-	17,084,825	38,110,731
Exports	Minerals & metals	72,351,048	92,220,504	65,863,768	83,244,706	100,483,144
Imports	Minerals & metals	1,517,310,26	1,383,724,28	1,433,647,74	1,526,800,56	1,592,575,11
GSP imports	Minerals & metals	-	-	-	94,168,551	186,183,159
Exports	Miscellaneous manufactures	25,738,828	25,260,016	23,146,106	42,911,562	37,730,617
Imports	Miscellaneous manufactures	5,318,566	5,167,595	6,829,704	11,620,683	11,640,925
GSP imports	Miscellaneous manufactures	-	-	-	4,766,529	6,698,297
Exports	Special provisions	90,392,632	113,656,485	98,728,842	107,760,749	134,725,807
Imports	Special provisions	31,407,170	32,854,080	56,870,507	49,658,188	62,854,473
Exports	Textile & apparel	42,879,313	41,520,338	41,287,582	42,122,869	42,473,048
Imports	Textile & apparel	2,799,390	24,753,273	37,669,016	61,604,540	77,544,953
GSP imports	Textile & apparel	-	-	-	1,303,021	1,773,712
Exports	Transportation equipment	620,456,640	467,615,002	495,806,521	337,418,575	506,448,152
Imports	Transportation equipment	15,597,913	19,602,325	26,187,448	31,556,305	52,159,511
GSP imports	Transportation equipment	-	-	-	11,270,371	28,754,682
Total export value		2,060,502,93	2,383,270,26	2,144,460,40	2,114,884,75	2,696,500,75
Total import value		1,728,980,65	1,719,899,89	1,851,045,49	2,019,700,63	2,209,586,72
Total import (GSP) value		-	-	-	181,218,160	356,987,525

Source: U.S. Department of Commerce, Bureau of the Census.

SUDAN						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$52,733,649	$13,521,309	$23,741,779	$38,160,653	$10,497,678
Imports	Agriculture	14,922,813	11,143,267	11,467,650	34,336,092	21,884,241
GSP imports	Agriculture	56,120	-	-	-	-
Exports	Chemicals & related products	1,863,118	385,543	840,139	477,161	841,090
Imports	Chemicals & related products	-	10,437	31,338	9,288	14,132
Exports	Electronic products	5,510,816	5,230,890	6,055,162	3,014,773	3,012,133
Imports	Electronic products	26,500	1,800	6,116	-	6,015
Exports	Energy related products	995,334	175,950	251,715	355,302	131,769
Imports	Footwear	4,227	-	-	-	-
Exports	Forest products	193,003	49,531	138,262	20,190	102,764
Imports	Forest products	-	-	12,500	-	-
Exports	Machinery	10,243,067	8,754,238	10,764,278	6,856,285	12,315,437
Imports	Machinery	-	6,665	2,350	-	-
Exports	Minerals & metals	446,047	496,630	236,819	415,169	1,338,294
Imports	Minerals & metals	-	-	4,526	-	-
Exports	Miscellaneous manufactures	144,422	33,481	16,141	3,828	16,611
Imports	Miscellaneous manufactures	17,287	16,252	48,961	800,000	288
Exports	Special provisions	2,490,261	1,266,987	829,136	890,204	558,183
Imports	Special provisions	189,590	178,926	90,343	127,525	532,855
Exports	Textile & apparel	129,226	797,679	265,561	54,891	113,628
Imports	Textile & apparel	117,808	-	90,911	1,054	59,640
Exports	Transportation equipment	17,408,847	20,894,136	9,417,246	4,108,691	13,886,941
Imports	Transportation equipment	101,893	-	2,205	4,959	-
Total export value		92,157,790	51,606,374	52,556,236	54,357,147	42,814,528
Total import value		15,380,118	11,357,347	11,756,900	35,278,918	22,497,171
Total import (GSP) value		56,120	-	-	-	-

Source: U.S. Department of Commerce, Bureau of the Census.

SWAZILAND						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$315,866	$335,822	$391,315	$1,785,676	$2,135,582
Imports	Agriculture	19,088,439	7,499,701	6,465,392	17,341,782	6,622,382
GSP imports	Agriculture	17,677,663	7,388,350	6,234,661	16,868,380	6,098,397
Exports	Chemicals & related products	272,509	215,217	262,665	268,087	171,496
Imports	Chemicals & related products	348,383	74,193	80,094	450,701	905,976
GSP imports	Chemicals & related products	212,537	15,229	16,637	353,864	852,039
Exports	Electronic products	1,514,163	1,653,538	337,400	1,533,120	460,686
Imports	Electronic products	18,107	286,811	23,062	38,619	49,237
Exports	Energy related products	-	-	5,460	6,300	-
Imports	Energy related products	-	-	169,645	419,658	-
Exports	Footwear	-	-	32,794	27,431	-
Imports	Footwear	-	-	304,674	-	-
Exports	Forest products	1,567,273	3,320	22,400	28,285	46,737
Imports	Forest products	1,634,554	2,007,082	1,870,745	1,476,354	6,492,103
GSP imports	Forest products	58,494	21,364	64,113	255,030	92,278
Exports	Machinery	29,227	174,890	821,058	1,235,658	84,718
Imports	Machinery	167,377	5,835	126,991	117,976	180,177
GSP imports	Machinery	-	-	1,279	3,000	-
Exports	Minerals & metals	25,184	31,508	110,007	70,405	-
Imports	Minerals & metals	1,574,444	5,061,473	631,913	387,144	251,122
GSP imports	Minerals & metals	1,409,307	1,041,741	511,852	130,796	149,814
Exports	Miscellaneous manufactures	152,907	-	17,605	29,355	41,419
Imports	Miscellaneous manufactures	61,960	560,631	1,996,681	1,783,070	3,818,158
GSP imports	Miscellaneous manufactures	48,169	358,728	1,920,817	1,781,627	3,733,283
Exports	Special provisions	374,933	638,057	353,017	139,088	265,598
Imports	Special provisions	282,893	139,067	125,649	284,133	169,360
Exports	Textile & apparel	100,960	-	8,036	38,054	17,853
Imports	Textile & apparel	5,236,004	7,294,738	9,725,366	15,505,503	11,733,204
Exports	Transportation equipment	121,931	536,118	23,465	156,907	9,170
Imports	Transportation equipment	-	-	23,793	-	15,640
GSP imports	Transportation equipment	-	-	-	-	15,640
Total export value		4,474,953	3,588,470	2,385,222	5,318,366	3,233,259
Total import value		28,412,161	22,929,531	21,544,005	37,804,940	30,237,359
Total import (GSP) value		19,406,170	8,825,412	8,749,359	19,392,697	10,941,451

Source: U.S. Department of Commerce, Bureau of the Census.

TANZANIA						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$2,510,377	$2,452,303	$4,213,442	$16,722,564	$12,990,403
Imports	Agriculture	9,930,687	6,457,016	6,130,568	4,535,283	9,360,369
GSP imports	Agriculture	112,262	84,114	129,482	79,786	105,736
Exports	Chemicals & related products	4,062,253	2,114,521	1,722,939	1,846,305	1,637,202
Imports	Chemicals & related products	87,115	87,950	181,590	147,435	131,389
GSP imports	Chemicals & related products	-	-	-	-	1,160
Exports	Electronic products	2,547,179	2,762,014	2,946,593	4,512,370	6,268,992
Imports	Electronic products	1,848	-	-	-	3,226
Exports	Energy related products	238,431	1,178,132	987,284	167,352	539,705
Imports	Energy related products	-	-	193,632	-	-
Exports	Footwear	28,722	-	35,103	135,000	411,000
Exports	Forest products	336,924	628,695	879,568	1,061,816	991,522
Imports	Forest products	129,196	212,261	321,421	436,578	484,479
GSP imports	Forest products	41,104	44,111	108,852	21,700	121,161
Exports	Machinery	4,710,742	2,953,721	3,877,457	3,061,158	10,657,293
Exports	Minerals & metals	456,225	168,122	373,887	167,836	2,649,898
Imports	Minerals & metals	192,416	553,035	528,959	2,315,003	3,050,693
GSP imports	Minerals & metals	11,831	28,132	175,977	929,854	1,691,328
Exports	Miscellaneous manufactures	251,707	124,698	776,413	345,516	151,410
Imports	Miscellaneous manufactures	157,302	79,699	156,742	252,903	3,285,045
GSP imports	Miscellaneous manufactures	18,620	1,333	14,802	6,354	2,644
Exports	Special provisions	2,159,325	4,429,683	2,211,322	8,284,022	4,046,666
Imports	Special provisions	311,301	128,264	162,199	618,767	609,791
Exports	Textile & apparel	6,443,446	7,433,652	7,400,072	7,143,134	5,782,563
Imports	Textile & apparel	4,064,439	3,435,490	3,752,019	6,622,318	5,495,083
GSP imports	Textile & apparel	-	850,328	73,653	-	-
Exports	Transportation equipment	8,772,745	6,530,944	7,333,195	5,319,313	20,019,250
Total export value		32,518,076	30,776,485	32,757,275	48,766,386	66,145,904
Total import value		14,874,304	10,953,715	11,427,130	14,928,287	22,420,075
Total import (GSP) value		183,817	1,008,018	502,766	1,037,694	1,922,029

Source: U.S. Department of Commerce, Bureau of the Census.

TOGO						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$8,246,170	$7,739,696	$6,232,820	$2,642,123	$4,167,344
Imports	Agriculture	1,627,528	1,891,468	1,338,415	1,538,945	1,090,369
GSP imports	Agriculture	154,562	289,855	77,591	56,323	103,309
Exports	Chemicals & related products	1,887,562	1,166,297	314,633	914,310	2,115,722
Imports	Chemicals & related products	-	-	780	-	628,133
GSP imports	Chemicals & related products	-	-	780	-	-
Exports	Electronic products	881,110	541,760	722,897	357,060	366,285
Imports	Electronic products	-	20,617	-	19,405	-
GSP imports	Electronic products	-	-	-	19,405	-
Exports	Energy related products	-	-	8,094	-	15,594
Imports	Energy related products	-	3,317,823	-	-	25,833,373
Exports	Footwear	330,252	693,629	77,078	158,237	489,527
Exports	Forest products	58,718	94,776	5,035	83,304	74,114
Imports	Forest products	49,985	14,581	31,063	42,884	2,500
GSP imports	Forest products	49,985	11,391	29,563	42,884	2,500
Exports	Machinery	965,610	605,766	48,830	2,111,241	2,631,106
Imports	Machinery	-	1,462	71,799	-	-
GSP imports	Machinery	-	-	71,799	-	-
Exports	Minerals & metals	327,059	141,655	8,460	3,780	23,471
Imports	Minerals & metals	29,125	11,240	6,016	3,010	2,100
GSP imports	Minerals & metals	14,125	11,240	4,516	3,010	2,100
Exports	Miscellaneous manufactures	68,000	67,663	47,040	6,862	89,697
Imports	Miscellaneous manufactures	255,300	568,596	256,175	227,034	583,419
GSP imports	Miscellaneous manufactures	24,300	390,672	31,285	3,654	106,399
Exports	Special provisions	547,839	358,682	563,552	987,194	1,986,944
Imports	Special provisions	6,468	255,158	14,880	9,912	476,628
Exports	Textile & apparel	6,266,603	3,854,559	2,010,899	2,687,329	4,381,327
Imports	Textile & apparel	612,077	6,589	1,671,847	2,246,888	708,686
GSP imports	Textile & apparel	1,458	3,557	604	275	495
Exports	Transportation equipment	4,207,037	4,131,765	2,511,801	2,470,935	1,801,265
Total export value		23,785,960	19,396,248	12,551,139	12,422,375	18,142,396
Total import value		2,580,483	6,087,534	3,390,975	4,088,078	29,325,208
Total import (GSP) value		244,430	706,715	216,138	125,551	214,803

Source: U.S. Department of Commerce, Bureau of the Census.

UGANDA						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$4,182,022	$5,149,242	$8,598,754	$6,896,619	$5,288,915
Imports	Agriculture	17,791,399	11,659,407	9,446,724	34,406,069	12,440,708
GSP imports	Agriculture	-	67,707	4,340	-	-
Exports	Chemicals & related products	579,293	837,195	1,724,644	1,323,139	2,120,215
Imports	Chemicals & related products	7,933	39,863	1,500	22,570	104,317
GSP imports	Chemicals & related products	4,558	39,863	1,500	5,370	76,717
Exports	Electronic products	1,388,911	2,438,876	2,774,592	3,167,614	5,037,754
Imports	Electronic products	-	3,196	7,923	-	-
Exports	Energy related products	10,230	15,912	19,951	4,442	11,864
Exports	Footwear	-	-	13,200	33,488	140,473
Exports	Forest products	352,024	337,738	152,583	843,489	764,969
Imports	Forest products	-	8,778	17,217	135,136	25,040
GSP imports	Forest products	-	-	17,217	128,728	21,820
Exports	Machinery	756,806	285,330	1,108,094	2,528,714	2,112,024
Imports	Machinery	7,203	-	-	-	-
GSP imports	Machinery	7,203	-	-	-	-
Exports	Minerals & metals	34,795	50,545	792,157	74,830	82,095
Imports	Minerals & metals	77,996	275,141	422,730	153,543	521,870
GSP imports	Minerals & metals	47,996	168,245	195,230	133,893	521,870
Exports	Miscellaneous manufactures	26,693	45,672	18,100	173,138	305,744
Imports	Miscellaneous manufactures	-	3,823	-	5,935	6,210
GSP imports	Miscellaneous manufactures	-	1,692	-	5,935	-
Exports	Special provisions	1,533,747	2,271,163	1,627,272	1,701,427	1,505,886
Imports	Special provisions	48,492	15,278	4,190	131,687	47,065
Exports	Textile & apparel	2,922,020	3,148,892	3,605,092	3,166,767	2,886,510
Imports	Textile & apparel	2,838	288	-	911	12,834
GSP imports	Textile & apparel	-	-	-	911	12,834
Exports	Transportation equipment	964,998	668,578	260,350	7,553,796	1,605,370
Imports	Transportation equipment	2,500	-	2,000	2,550	-
Total export value		12,751,539	15,249,143	20,694,789	27,467,463	21,861,819
Total import value		17,938,361	12,005,774	9,902,284	34,858,401	13,158,044
Total import (GSP) value		59,757	277,507	218,287	274,837	633,241

Source: U.S. Department of Commerce, Bureau of the Census.

ZAIRE						
Sector		1991	1992	1993	1994	1995
Exports	Agriculture	$15,164,573	$9,300,110	$10,754,850	$10,490,548	$30,969,416
Imports	Agriculture	3,253,760	4,962,005	1,954,965	1,609,864	4,176,457
GSP imports	Agriculture	-	-	-	5,220	356,320
Exports	Chemicals & related products	5,517,750	1,983,958	2,020,227	2,251,302	2,296,378
Imports	Chemicals & related products	905,616	677,569	3,234,943	11,973,868	1,203,088
GSP imports	Chemicals & related products	546,498	677,569	617,117	956,913	1,108,417
Exports	Electronic products	6,961,178	2,203,594	3,111,086	3,139,517	7,996,403
Imports	Electronic products	-	4,000	1,470	33,493	8,000
Exports	Energy related products	296,423	303,334	225,758	198,462	261,759
Imports	Energy related products	167,427,707	110,328,308	128,587,220	105,999,271	132,432,339
Exports	Footwear	66,797	236,110	533,284	485,022	731,820
Imports	Footwear	59,684	-	-	-	-
Exports	Forest products	254,613	240,763	142,407	132,540	216,458
Imports	Forest products	126,363	201,280	372,399	221,747	370,719
GSP imports	Forest products	1,450	54,987	34,965	92,167	50,143
Exports	Machinery	4,427,254	2,527,484	1,043,501	2,312,110	2,479,677
Imports	Machinery	-	3,862	3,676,320	-	4,571
Exports	Minerals & metals	826,113	248,913	986,275	2,398,322	4,637,342
Imports	Minerals & metals	128,962,597	131,433,385	101,910,803	63,686,931	128,167,626
GSP imports	Minerals & metals	143,576	5,608,149	30,020,127	189,597	78,054
Exports	Miscellaneous manufactures	220,343	56,291	53,200	125,873	17,931
Imports	Miscellaneous manufactures	1,114,973	1,960,572	866,528	1,898,618	859,000
GSP imports	Miscellaneous manufactures	792,864	954,806	421,290	552,526	371,766
Exports	Special provisions	2,683,997	3,014,945	1,955,334	2,555,326	3,005,323
Imports	Special provisions	339,000	92,871	138,166	858,426	168,548
Exports	Textile & apparel	7,260,261	7,452,774	8,149,178	9,059,854	14,490,785
Imports	Textile & apparel	14,649	1,385	3,310	6,557	11,307
Exports	Transportation equipment	17,566,851	4,775,328	6,169,738	6,272,575	9,713,234
Imports	Transportation equipment	3,000	-	-	679,209	-
GSP imports	Transportation equipment	-	-	-	622,940	-
Total export value		61,246,153	32,343,604	35,144,838	39,421,451	76,816,526
Total import value		302,207,349	249,665,237	240,746,124	186,967,984	267,401,655
Total import (GSP) value		1,484,388	7,295,511	31,093,499	2,419,363	1,964,700

Source: U.S. Department of Commerce, Bureau of the Census.

	ZAMBIA					
	Sector	1991	1992	1993	1994	1995
Exports	Agriculture	$314,314	$43,927,044	$10,678,467	$1,928,797	$2,664,184
Imports	Agriculture	1,089,860	321,998	680,008	572,248	401,418
GSP imports	Agriculture	-	2,750	7,380	71,696	44,490
Exports	Chemicals & related products	1,813,306	2,503,168	1,138,828	815,700	3,959,065
Imports	Chemicals & related products	7,432	8,415	1,579	6,855	27,450
Exports	Electronic products	4,002,588	2,874,812	4,233,205	4,060,904	8,211,567
Imports	Electronic products	6,729	7,931	15,822	-	3,531
Exports	Energy related products	-	-	2,759,484	77,703	20,585
Exports	Footwear	-	-	34,763	308,251	273,464
Exports	Forest products	369,939	267,142	975,075	9,340,803	15,449,748
Imports	Forest products	19,538	45,823	33,343	24,770	35,211
GSP imports	Forest products	18,038	27,712	31,217	24,770	15,211
Exports	Machinery	2,420,908	1,447,291	4,074,127	3,883,545	4,177,777
Imports	Machinery	10,906	-	-	-	-
GSP imports	Machinery	1,380	-	-	-	-
Exports	Minerals & metals	789,595	304,459	726,159	162,043	720,137
Imports	Minerals & metals	42,544,520	69,578,081	39,482,091	61,464,617	32,284,781
GSP imports	Minerals & metals	132,401	12,736	111,016	69,974	189,515
Exports	Miscellaneous manufactures	115,983	33,071	66,324	72,447	107,606
Imports	Miscellaneous manufactures	14,610	48,190	45,464	2,907	35,222
GSP imports	Miscellaneous manufactures	2,655	6,190	10,011	961	-
Exports	Special provisions	1,941,733	6,700,271	5,165,633	2,450,214	2,867,675
Imports	Special provisions	201,435	230,742	104,945	126,454	105,168
Exports	Textile & apparel	1,020,572	4,291,748	5,966,407	5,684,401	4,294,891
Imports	Textile & apparel	900	255,155	404,960	1,279,040	-
GSP imports	Textile & apparel	-	-	-	260	-
Exports	Transportation equipment	7,954,991	5,217,443	5,950,737	3,477,942	6,029,928
Imports	Transportation equipment	17,648	22,809	15,752	-	-
Total export value		20,743,929	67,566,449	41,769,209	32,262,750	48,776,627
Total import value		43,913,578	70,519,144	40,783,964	63,476,891	32,892,781
Total import (GSP) value		154,474	49,388	159,624	167,661	249,216

Source: U.S. Department of Commerce, Bureau of the Census.

ZIMBABWE						
	Sector	1991	1992	1993	1994	1995
Exports	Agriculture	$556,708	$87,747,164	$25,265,235	$3,287,676	$9,163,190
Imports	Agriculture	18,882,062	62,352,018	79,022,194	49,593,651	12,135,709
GSP imports	Agriculture	7,692,358	289,752	511,418	18,289,233	8,012,084
Exports	Chemicals & related products	8,360,815	8,680,187	7,394,436	6,078,419	10,719,131
Imports	Chemicals & related products	47,582	21,654	34,555	161,326	116,810
GSP imports	Chemicals & related products	13,420	6,359	12,281	90,811	45,668
Exports	Electronic products	7,518,962	7,291,124	7,729,469	15,505,474	10,986,980
Imports	Electronic products	12,896	32,758	26,801	13,538	42,038
GSP imports	Electronic products	-	2,468	-	-	-
Exports	Energy related products	225,961	154,389	55,352	61,787	178,027
Imports	Energy related products	-	-	-	2,057,644	2,108,653
Exports	Footwear	1,534,408	-	103,028	105,047	15,983
Imports	Footwear	8,633	-	-	177,592	257
Exports	Forest products	917,187	479,717	3,350,290	846,906	2,760,763
Imports	Forest products	77,528	55,128	536,610	1,817,004	2,315,562
GSP imports	Forest products	31,563	53,556	139,613	184,134	149,628
Exports	Machinery	12,903,775	13,257,959	16,908,899	20,890,933	28,850,685
Imports	Machinery	292,660	207,054	536,370	714,781	691,587
GSP imports	Machinery	3,712	207,054	38,834	137,830	140,042
Exports	Minerals & metals	1,378,202	664,260	540,930	1,435,470	860,012
Imports	Minerals & metals	49,480,586	58,742,210	38,099,614	28,942,880	50,254,197
GSP imports	Minerals & metals	2,041,620	13,516,712	24,765,662	12,419,304	30,708,997
Exports	Miscellaneous manufactures	466,275	947,910	466,438	610,699	712,377
Imports	Miscellaneous manufactures	703,881	2,181,797	10,383,829	9,798,111	13,244,485
GSP imports	Miscellaneous manufactures	237,345	1,662,213	9,793,694	9,060,685	12,542,535
Exports	Special provisions	3,663,898	4,859,026	3,765,832	2,227,718	2,901,767
Imports	Special provisions	913,518	659,783	634,537	875,645	901,387
Exports	Textile & apparel	811,338	1,141,793	577,031	1,369,825	1,211,315
Imports	Textile & apparel	6,954,118	5,931,160	12,961,214	11,301,527	14,213,531
GSP imports	Textile & apparel	-	-	2,047	12,529	1,291
Exports	Transportation equipment	14,354,435	16,949,881	16,905,857	39,808,890	51,815,059
Imports	Transportation equipment	9,058	10,074	65,679	574,228	664,424
GSP imports	Transportation equipment	3,318	-	-	-	23,422
Total export value		52,691,964	142,173,410	83,062,797	92,228,844	120,175,289
Total import value		77,382,522	130,193,636	142,301,403	106,027,927	96,688,640
Total import (GSP) value		10,023,336	15,738,114	35,263,549	40,194,526	51,623,667

Source: U.S. Department of Commerce, Bureau of the Census.