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Protection Facing Exports from Sub-Saharan Africa in the EC, Japan, and the United States

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and
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Sub-Saharan African countries have suffered relatively little from trade protection in Japan, the European Community, and the United States. This is in part due to the substantive preferential treatment they receive, especially in the European Community, and in part a consequence of the product mix of their exports, heavy in primary goods.

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Erzan and Svedberg address two questions in this report:

- Have exporters in Sub-Saharan Africa (SSA) faced more or less protection in Japan, the EC, and the United States than other developing countries?

- To what extent has protection in those markets constrained SSA's export growth?

Erzan and Svedberg find that on the whole SSA suffered relatively little from either tariff or nontariff protection in the major industrial markets.

In part this is because they often get a better preferential treatment, especially in the EC. In part it is because their exports are heavy primary goods which are generally subject to less protection.

There is no compelling evidence that protection in the major industrial markets has constrained export growth in SSA.

This paper is a product of the International Trade Division, International Economics Department. Copies are available free from the World Bank, 1818 H Street NW, Washington DC 20433. Please contact Grace Ilogon, room S8-038, extension 33732 (56 pages with tables).

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PROTECTION FACING EXPORTS FROM SUB-SAHARAN AFRICA IN THE EEC, JAPAN AND THE US

Refik Erzan* and Peter Svedberg**

1. INTRODUCTION

The real export earnings of a great majority of Sub-Saharan African (SSA) 1/ countries declined over the 1970-85 period. Moreover, the African countries lost shares in most of the world primary commodity markets on a substantial scale. In 1988, Singapore, with a population of 2.5 million, had export revenues at par with all of the SSA countries together - the home of over four hundred million people. It has been shown that although supply shortcomings were the predominant cause of the poor export performance of most SSA countries, the demand-side, specifically the deterioration in the barter terms-of-trade had a negative impact on export revenues (Svedberg (1988)).

The objective of this paper is to investigate yet another constraint on the demand-side, namely, the extent to which protection in the major industrial market economies facing SSA products might have hampered their

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1/ SSA is broadly defined as all countries in the continent excluding the North African countries and South Africa. The 47 SSA countries under study are listed in Table 6.

export growth. The incidence of protection encountered by SSA is analyzed and compared with that faced by all developing countries taken together.

Industrial market economies are represented by the EEC (10), Japan and the US, which together absorb more than three-fourths of total African exports. This share has remained largely unaltered during the past two decades, particularly in the 1980s. Both tariffs and non-tariff barriers (NTBs) which were effective in the 1980s are analyzed. However, since tariffs in industrial market economies, especially those on primary products - the bulk of SSA exports - are relatively low, the critical area is the incidence of NTBs, although tariff escalation is a potential problem.

The plan of the paper is as follows. The export performance of the SSA countries over the 1970-85 period is briefly summarized in Section II. In Section III, a short description of the export structure of these countries is provided as additional background. In Section IV, the general developments in tariff and NTB protection of the industrial market economies and escalation of trade barriers are discussed. In Section V, the average tariffs on African exports and the incidence of NTBs are compared with those faced by all developing countries taken together. Also the main NTBs affecting SSA are singled out. In Section VI, the SSA countries are considered individually. Tariff averages, preference margins and the incidence of NTBs are investigated. Furthermore, products affected by specific NTBs are examined. In the case of the EEC, NTBs on major product groups are scrutinized to distinguish the purely restrictive ones from those that actually allow preferential treatment of SSA. A final, concluding Section summarizes the main findings of the study.

2. THE EXPORT PERFORMANCE OF SUB-SAHARAN AFRICA

Over the past two decades, the purchasing power of the combined export earnings of the SSA countries remained stagnant (see Svedberg (1988)). An overwhelming majority of SSA countries, for which data were available, had their real export earnings dwindle or stagnate. Only three oil-exporting SSA countries -- Congo, Gabon and Nigeria -- and Niger, owing to uranium, had increasing export earnings at par with the rest of the world; another four countries (Central African Republic, Malawi, Mali and Rwanda), had more modest increases in real export earnings. Compared to the export achievements of the African countries over the period 1954-69, their performance during the the years 1970-85 was strikingly bleak. During the earlier period, their real export earnings grew by 6 percent annually; in fact, no single SSA country experienced declining real export earnings in that period.

The meager performance of the SSA countries since the early 1970s has meant drastically declining shares in world markets. Between 1970 and 1986, their share of total world exports fell from 2.4 to 1.3 percent. In non-oil export the decline was even more drastic. In all primary commodities excluding oil, their world share fell from 7 to below 4 percent (see Svedberg (1988)).

The predominant causes of the poor export performance for most African countries are found on the supply-side. On the demand-side, the most notable event over the 1970-85 period is the deteriorating barter terms of trade that all the SSA countries, except the oil-exporters, experienced. The price decline of primary products accounted for about one third of the overall world market share loss of the SSA. The remaining two thirds was due to failures to expand export volumes. The volume decline has so far been ascribed to problems on the supply-side. In the following, we shall investigate to what extent protection in the main importing countries could have been part of the explanation.

3. COMMODITY COMPOSITION AND DESTINATION OF SUB-SAHARAN AFRICA'S EXPORTS

The s.ructure and intensity of protection that exporters encounter differ considerably across products and markets. Commodity composition and destination of exports were thus important determinants of the overall protection faced by SSA.

Since the time when the African countries were drawn into world trade by the colonial powers, primary commodities have dominated their exports. Manufactures defined narrowly (as SITC 5 to 8 less 68) accounted for only 6 percent of SSA's total exports in both 1970 and 1985 (see Table 1). 1/ Two major changes occured in the composition of SSA's exports during this period. First, the total value of crude oil exports expanded roughly twenty

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1/ Tables 1 and 2 are based on partner country import statistics. This gives a more accurate profile since import data of the OECD countries - which constitute the major market - are considerably more reliable and up to date. Yeats (1989a) found that, especially in crude oil, cacao and coffee - which are under cartels - many SSA countries underreport their exports with a large margin. Furthermore, in many cases the most recent data pertain to 1983 (see Appendix Tables 1 and 2). There are two major shortcomings, however, in using partner country import statistics. One is that the data are in c.i.f., rather than f.o.b., prices - including freight and insurance. Secondly, due to non-reporting centrally planned economies and poorly reporting developing countries, the actual share of industrial market economies is overstated.

times and its share jumped from 13 to 60 percent. Second, there was a drastic decline in the share of the exports of ores and metals, from 32 to 9 percent. The value of exports of foodstuffs and agricultural raw materials roughly doubled, yet their share in total exports dropped by half.

The predominance of primary products in SSA's exports is a mixed blessing from the point of view of protection in the industrial market economies. Mineral fuels, ores and metals face negligible duties and often only nominal NTBs. Also most tropical products which do not compete with production in the developed countries are relatively less protected goods. However, since agriculture is the most heavily protected and subsidized sector in the industrial market economies, in temperate zone products their markets are very difficult to penetrate (see OECD (1987)). Furthermore, there is considerable escalation in trade barriers in higher levels of processing for most goods; agricultural and mining (Yeats (1988)), as well as in tropical products (Cable (1988) and UNCTAD (1988)).

Only a very small number of SSA countries have managed to diversify their export base during the 1970-85 period. The most notable example was Mauritius where textiles and clothing became the predominant exports (see Appendix Table 1). 1/ Some other countries added "non-traditional" primary products to their exports. These included horticultural and fishery products which also comprised some processed items. 2/

1/ Appendix Tables 1 and 2 which give information for individual SSA countries are based on these countries' own export data - as opposed to Tables 1 and 2 in the main text which use partner country import statistics. This is due to the fact that, at an individual level, for some SSA countries, non-reporting centrally planned economies and some poorly reporting developing countries are relatively important markets. In these cases, a tabulation based on partner countries would yield an even more inaccurate picture.

2/ Certain processed goods do not fall into the conventional definition of manufactures. Conversely, items such as precious and semi-precious stones are captured as manufactures (see, e.g., Sierra Leone in Appendix Table 1).

Table 1: Commodity Composition of Sub-Saharan Africa's Exports[a], 1970 and 1985

percent

Sector	(SITC)	1970	1985[b]
Non-manufactures	(0 to 4 + 68)	94[b]	94[b]
Food	(0 + 1 + 22 + 4)	37	20
Agricultural raw materials	(2 less (22 + 27 + 28))	13	6
Ores and metals	(27 + 28 + 68)	32	9
Fuels	(3)	13	60
Manufactures	(5 to 8 less 68)	6	6
Total	(0 to 9)	100	100
(Million US$)		(7,887)	(37,294)

Source: COMTRADE Data Base, UNSO.

Notes:

a. Based on partner country import statistics.
b. Due to rounding up, the components add up to 95 percent.

Table 2: Destination of Developing Countries' Exports[a], 1970 and 1985

percent

Exports from	Year	Developed market economies				Developing countries	All other countries
		Total	EEC	Japan	US		
All developing countries	1970	80	40	12	18	18	2
	1985	77	25	16	27	22	1
Non-OPEC developing	1970	79	35	12	22	20	1
	1985	77	21	15	34	22	1
Sub-Saharan Africa	1970	87	58	8	9	11	2
	1985	85	50	2	21	15	0
Memo item: World	1970	80	41	7	14	18	2
	1985	81	37	8	21	18	1

Source: COMTRADE Data Base, UNSO.

Notes:

a. Based on partner country import statistics. Due to non-reporting centrall planned economies and poorly reporting developing countries, the figure overstate the actual shares for developed market economies.
b. Developing countries are defined in accordance with the UN.

Concerning destination, Europe and, in particular, the EEC, is the dominant market for SSA's exports. More than two thirds of total exports from most SSA countries went to the EEC in 1985 (see Appendix Table 2). Only around one-third of the SSA countries had less than half of their exports going to this market. Botswana, the Seychelles and Somalia had less than 20 percent of their exports to the EEC. For these countries, and also for Burkina Faso, Cape Verde, Kenya, Mozambique and Sudan, other developing countries (or the South African Union in the case of Botswana) have become important markets, absorbing roughly half of their exports.

The concentration of SSA's exports to Europe, and in particular to the EEC, largerly reflects the colonial heritage. The special ties of the industrial countries with their ex colonies still have a considerable influence on trade patterns (see Svedberg (1981) and Kleiman, (1977)). Nevertheless, during the 1970-1985 period, in addition to the increasing importance of other developing countries, there was also some reshuffling between the EEC and the US markets for SSA's exports. Angola, Congo, Gabon and Nigeria - which are the main oil producers - shifted the bulk of their exports from the EEC to the US. For the coffee exporters, Ethiopia, Burundi and Rwanda, the opposite happened (see Appendix Table 2).

The market concentration on Europe had important implications for Africa's export growth. Of the three main markets considered here, the US is by far the largest in terms of non-oil imports from developing countries. In fact, in 1985, US imports from developing countries were roughly the same as those of the EEC and Japan taken together (see Table 2). In the early 1970s the situation was quite different; the EEC was then the largest market for non-oil exports from developing countries. Over a decade, the growth in the US market for developing country exports was about twice the rate of that in the EEC. The share of SSA's exports going to the US did increase significantly during this period, from 9 to 21 percent. However, petroleum accounted for most of this increase. A noteworthy development was that the share of SSA's exports to Japan dropped drastically, from 8 to 2 percent, while this market absorbed an increasing share of developing countries' exports in general. It should be emphasized, however, that while fuels, mainly crude oil, constituted approximately half of SSA's total exports to the EEC, and over three forths of its exports to the US, they were negligible in SSA's exports to Japan.

It seemed that Sub-Saharan Africa did not have the "right" products to exploit the potential in the fast growing US market for labor-intensive manufactures. Despite an increase in "new" forms of protection, the US largely remained an open market, and the developing countries on the whole managed to penetrate it with great success (see Yeats (1989b)). Nevertheless, lost opportunity aside, it will be argued in Sections 5 and 6 that the fact that SSA's exports were concentrated to the EEC - rather than to the US - did not necessarily imply relatively less favorable conditions in terms of trade barriers faced. This was due to the preferential treatment the SSA enjoyed in the EEC.

4. TARIFF AND NON-TARIFF PROTECTION IN INDUSTRIAL MARKET ECONOMIES

The major accomplishment of the post-war multilateral trade negotiations (MTNs) was the drastic reduction of industrial country tariffs. Through seven rounds of negotiations - Geneva (1947 and 1956), Annecy (1949), Torquay (1951), Dillon (1962), Kennedy (1968) and the Tokyo (1979) Round - the average for the developed country most-favoured-nation (MFN) tariffs was slashed from 40 to about 5 percent (see GATT (1980), UNCTAD (1968) and (1982)). 1/

4.1. "New" Protectionism

As tariffs have been progressively reduced, the importance of non-tariff barriers (NTBs) or non-tariff measures (NTMs), as they are sometimes called, have increased significantly (see Laird and Yeats (1988)). 2/ While governments were under legal obligation with respect to tariffs, they responded to domestic protectionist pressures by resorting to NTBs, which were only loosely monitored by the General Agreement on Tariffs and Trade (GATT). Moreover, the most favored nation (MFN) principle, the cornerstone of the GATT, has been eroded as NTBs were increasingly directed against specific countries and country groups.

The spread of these measures and their domination of major sectors, such as agriculture, textiles and steel, is widely considered a threat to the functioning of the GATT and, more generally, the international trading system. The system is challenged in at least three important respects. Firstly, there has been an increase in the use of formally permissible instruments of non-tariff protection. Agriculture is the case in point where the EEC, for example, has become one of the world's largest exporters of sugar and beef through price support policies. Secondly, agreements such as the Multi-Fibre Arrangement (MFA), which are in essence discriminatory against products of importance to developing countries, have been "legitimized."

1/ Nevertheless, there are tariff "peaks", especially on products of special export interest for developing countries, such as textiles and clothing (see Erzan and Karsenty (1989)).

2/ See, also, Finger and Laird (1987), Nogues *et al* (1986) and Olechowski (1988).

Thirdly, the use of "grey area measures", such as "orderly marketing arrangements" and "voluntary export restraints", has increased. These measures lack transparency and involve de facto discrimination among trading partners.

Among the objectives of the current round of MTN, the Uruguay Round, which was launched in 1986, are the reversal of the trend concerning NTBs and the full integration of agriculture and other exceptions, such as textiles back into the GATT discipline. This makes it the most ambitious MTN round so far.

4.2. Non-Tariff Barriers

There is no commonly agreed term to describe non-tariff instruments, let alone a consensus on their coverage. While NTB is the term preferred by economists, who consider the distortions they create the common denominator, policymakers often wish to classify them among other policy measures and hence prefer the term non-tariff "measures." The UNCTAD Data Base on Trade Control Measures, which we use in our analysis, defines non-tariff measures as all government regulations and practices that may distort international trade by introducing differential treatment for imported and domestically produced goods. In doing so, no prior judgment is made as to the restrictiveness of specific NTBs, or whether they conform to national or international trade rules.

The information thus includes a wide range of non-tariff measures, some of which might have been implemented for legitimate non-protection reasons, such as concern for public health and safety. Since the discriminatory effect of some measures, such as health and safety regulations, technical standards and excise taxes, against imports vis-a-vis domestic products is arguable, they have been generally excluded from the analysis of official trade interventions. The "broad" group of NTBs used in such analysis includes para-tariff measures (such as tariff quotas, seasonal tariffs, supplementary tariffs, etc.), variable levies, countervailing and anti-dumping actions, quantitative restrictions, the surveillance of quantities and/or prices of imports, and various types of licensing. What is commonly referred to as the "narrow" group of NTBs excludes para-tariff measures, "automatic" licensing and authorizations and import surveillance measures. Finally, measures which with some certainty constitute effective trade barriers, such as tariff quotas, variable levies, quantiative restrictions and non-automatic import authorizations and licenses are often called "hard core" NTBs.

Most assessments of the general extent of the application of NTBs use two indicators: trade coverage and frequency ratios (see Laird and Yeats (1989)). The trade coverage ratio measures the value of imports affected by selected NTBs as a share of imports from a particular source. The frequency ratio for a given importer is based on a count for all trading parties. It shows the number of tariff lines in which imports occur in the presence of one or more NTBs divided by the total number of tariff lines where there are imports. The profile of NTBs has been analyzed by computing these indicators for selected NTBs and for specific groups of products. The trends in trade intervention have been analyzed by calculating these indicators for a number of years, using the trade flows of a fixed base year as weights. A major shortcoming of this method, however, is that the underlining trade flows are already affected by NTBs. In the extreme case, when an import barriers is prohibitive, it would appear that trade is not affected at all. It is therefore important to remember that trade coverage and frequency ratios do not necessarily measure the restrictiveness of the NTBs considered.

4.3. Escalation of Trade Barriers

Most primary (unprocessed) commodities in industrial market economies, with the exception of some temperate-zone agricultural products, are either free of import duties or face the lowest tariff rates - with the duties escalating as the goods undergo increased fabrication. The same pattern holds, although to a lesser extent, for non-tariff protection. Such escalation of trade barriers provides a disincentive for increased processing of primary commodities in the developing countries. This general phenomenon holds true in the case of tropical products as well. Furthermore, following the Tokyo Round Tariff reductions, also tariff escalation in highly processed tropical products has increased (Cable (1988)).

A recent study by Yeats (1988) considering sixteen material groups - meat, fish, vegetables, fruit, vegetable oils, tobacco, sugar, cocoa, rubber, leather, wood, cotton, iron, other metal ores, phosphates and petroleum - revealed that in all but fish, average tariffs (incorporating preferential rates) increased on the average by five to ten percentage points as one moved higher in the processing chain. Furthermore, in eleven of these cases, the incidence of NTBs also escalated considerably. Studies by Cable (1988), and UNCTAD (1988) corroborated these findings in tropical products. Ironically, developing countries export a much smaller proportion of processed tropical products than industrial countries do. Escalation of trade barriers certainly does not help to improve this imbalance.

It should also be underlined, however, that escalation of trade barriers is not a developed country phenomenon only. The pattern is the same in the case of developing countries (Yeats (1988)), where, as well, the level of protection is several times higher than in the industrial economies (Erzan et al (1989)).

4.4. Preferences

In previous MTN rounds, most developing countries preferred to stand by and enjoy the benefits of MFN concessions which resulted from negotiations among the major industrial market economies rather than participate actively on a reciprocal basis. 1/ They also argued strongly for unilateral preferential treatment by the developed countries. Following discussion under the auspicies of the GATT and UNCTAD in the late 1960s and early 1970s, the unilateral preferential schemes of industrial countries concerning tariffs were somewhat harmonized and put under a framework known as the Generalised System of Preferences (GSP). GSP covers only tariffs, not NTBs.

As the GSP schemes are unilaterally granted by the industrial countries, the list of beneficiary developing countries, the product coverage and the depth of the preference margins vary considerably across the donors. In the US, GSP beneficiaries are further subject to a "competetive need limit" for each product under the scheme. An eligible country exceeding this limit is temporarily disqualified for GSP treatment of the product in question. Otherwise, imports under the GSP are duty-free. More advanced developing countries, however, have "graduated" from the GSP beneficiary status altogether. In most other developed countries, the preference margin for beneficiaries is a certain percentage of the MFN rate (see UNCTAD (1989)). Certain limitations on GSP treatment exist in all industrial countries'

1/ This was probably a major reason why tariff cuts in products of particular interest for developing countries did not achieve the same depth.

schemes. The least developed countries (LLDCs) usually enjoy deeper preference margins and their product coverage is somewhat broader.

A survey of the GSP schemes of the major industrial countries revealed that, on the whole, the product coverage of GSP schemes in high tariff items was significantly narrower compared to lower tariff items (Erzan and Karsenty (1989)). The Japanese, US and EEC GSP schemes covered, respectively, 69, 51 and 68 percent of all tariff positions. In the EEC, GSP coverage in high tariff products was 69 percent compared to 78 percent in lower tariff items and in the US 27 and 57 percent, respectively.

Almost all Sub-Saharan countries are GSP beneficiaries in all developed country markets. Under this scheme, many of them also qualifying as LLDCs, 1/ enjoy wider product coverage and deeper preference margins compared to other developing countries. In the US, LLDCs are not subject to the "competetive need" criterion. Furthermore, all SSA countries belong to the ACP (Africa, Caribbean and Pacific) Group. 2/ <u>In principle</u>, as beneficiaries of the Lomé Convention, their exports enter the EEC without being subject to any barriers - tariff or non-tariff.

1/ Of the 42 LLDCs according to the UN, 25 are in SSA (denoted by * in Table 6). Mozambique received this status in 1988. In addition to this list, both the EEC and the US treat Botswana, Cape Verde and Tanzania (also the Seychelles in the EEC) as LLDCs. However, Mauritania in the EEC scheme and Ethiopia, Mauritania, Mozambique and Sao Tome in the US scheme do not have LLDC status.

2/ Except Namibia and Reunion. This also goes for EEC's GSP scheme.

5. TARIFF AND NON-TARIFF PROTECTION FACING SUB-SAHARAN AFRICA'S EXPORTS 1/

This Section investigates the overall incidence of tariffs and non-tariff barriers on exports from SSA in the major industrial market economies and compares this with the exports of all developing countries in the same markets.

5.1. Tariff Protection

The major exports of Sub-Saharan Africa, being primary products, are subject to relatively low tariff rates in developed market economies. Besides enjoying Most Favoured Nation (MFN) status, they are eligible for preferential treatment under the GSP schemes and the Lomé Convention.

Table 3 gives trade weighted average tariffs for all products excluding fuels faced by Sub-Saharan Africa and by all developing countries in the EEC, Japan and US. The averages are based on the tariffs which were actually applied to the individual countries' exports, taking into account preference margins. It was found that, in the EEC, where SSA was virtually exempt from tariff duties, 2/ the weighted average tariff rate for all developing countries was 1.76 percent for all products. In Japan, the

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1/ The NTB data used in the following Sections pertain to 1986 and (1981 for comparison). The base year for the data on trade and tariffs, on the other hand, is not always the same. The apparent inconsistency stems from the use of various specially designed computer programmes which cannot easily accommodate year to year changes in the product classifications of the markets studied.

2/ According to GATT sources, in 1986, 58 percent of ACP imports in the EEC had duty-free treatment under MFN and another 41 percent were admitted duty-free under the Lomé convention. At the same time, nine percent of these imports were eligible for GSP treatment, implying full exemption or reduced tariffs.

Table 3: Trade Weighted Average Tariffs[a] Faced by Sub-Saharan Africa and All Developing Countries in the EEC, Japan and the USA (all products excluding fuels)

Exporter	Market		
	EEC	Japan	USA
	percent		
Sub-Saharan Africa	0.01	1.64	0.48
All developing countries	1.76	4.03	6.67
(for same products as Sub-Saharan Africa)[b]	(1.75)	(1.71)	(6.63)

Source: GATT Tariff Study computer files.

Notes:

a. The averages are based on actual tariffs faced by individual countries including preference margins in 1983. Weights also pertain to actual 1983 trade.

Tariff lines for which data were not available were excluded. This was particularly important in the case of the EEC where over four hundred items, predominantly in the food sector, mostly pertaining to variable levies with no fixed component, had to be excluded.

b. Average for all developing countries, yet restricted to the list of products exported by Sub-Saharan countries to the relevant markets - using aggregate trade weights of all developing countries.

corresponding figures were 4.08 percent for all developing countries and 1.64 percent for SSA; in the US these were 6.67 percent and 0.48 percent respectively. Hence, the average perference margin, in percentage points, appeared to be the highest in the US, followed by Japan.

Part of these apparent preference margins were due to differences in the product mix of SSA compared to the rest of the developing countries. To remove the effect of this difference, yet another comparison, limited to the same products as SSA countries exported, was conducted. In weighting tariffs for the constrained list of products, actual trade weights were retained to reflect the relative importance of particular products for each country. When the tariff averages in the EEC and the US were calculated accordingly, the results did not change. It can thus be concluded that the difference between the average rates faced by SSA and the rest of developing countries was the reflection of actual preference margins. In Japan, however, the average tariff facing all developing countries, when restricted to the same list of products, was not much different from that facing Sub-Saharan Africa. The apparent margin in the first calculation was thus mainly due to differences in the composition of imports from the SSA and other developing countries.

It is noteworthy that duty-free treatment in the EEC under the Lomé scheme provided only a negligible margin to SSA's exports. On the other hand, the relatively higher tariff average in the US facing other developing countries yielded a substantial margin to Africa. 1/

1/ In the US, a number of developing countries have "graduated" from GSP beneficiary status. Furthermore, exceeding "competetive need limits", some beneficiaries temporarily disqualify concerning certain products.

5.2. Non-Tariff Protection

Using the two measures for the incidence of NTBs - their frequency and trade coverage ratios (described in Section 4.2) - Table 4 presents the overall situation faced by SSA's exports in comparison with that for all developing countries taken together. For all products in the three markets combined, the frequency of NTBs on SSA's exports was 14 percent as opposed to 24 percent for all the developing countries. On the other hand, NTBs covered around 16-18 percent of the exports of both groups. When fuels were excluded, however, the trade coverage of NTBs was considerably lower for SSA compared to the aggregate group of developing countries: 14 percent versus 24 percent. 1/

The picture in the EEC market, which dominated the aggregate figures, closely resembled the overall situation described above. In the US, the frequency of NTBs and their trade coverage of SSA's exports did not exceed a few percentage points, except in manufuctures. In Japan, NTB incidence on SSA appeared to be greater than that encountered by other developing countries. An inter-sectoral comparison revealed that, among SSA's exports, the products most affected by NTBs were foodstuff and manufactures in all three markets, and mineral fuels in the EEC.

In making these comparisons, it should be observed that the purpose of using the NTB frequency and trade coverage ratios is to give a snapshot by summarizing the information involving large and diversified trade flows encountering a variety of NTBs. However, for SSA's limited exports, the NTB

1/ Computations by Laird and Yeats (1989) corroborate our figures on the aggregate control group of all developing countries. Confining their analysis to "hard core" NTBs in 1986 facing non-fuel exports of developing countries in the OECD markets, they arrived at 18 percent for the frequency ratio and 21 percent for trade coverage.

and All Developing Countries in the EEC, Japan and the US

Sector[b]	Exporter	Market: EEC Frequency ratio[c]	EEC Coverage ratio[d]	Japan Frequency ratio	Japan Coverage ratio	USA Frequency ratio	USA Coverage ratio	Total Frequency ratio	Total Coverage ratio
		p e r c e n t							
Food	SSA	31	15	47	42	5	8	29	15
	All Dev.[e]	41	26	48	56	9	15	35	28
Agricultural raw materails	SSA	8	2	13	1	3	1	8	1
	All Dev.	11	5	17	6	3	12	11	6
Ores and metals	SSA	5	5	12	4	0	0	5	4
	All Dev.	3	5	6	5	1	3	3	5
Mineral fuels	SSA	28	31	0	0	0	0	22	18
	All Dev.	25	27	12	2	0	0	18	11
Chemicals	SSA	6	1	0	0	0	0	5	1
	All Dev.	3	1	12	19	1	15	3	11
Manufactures (exl. chem)	SSA	12	56	9	8	2	18	11	48
	All Dev.	26	42	8	8	18	24	24	29
All sectors	SSA	15	23	21	17	2	2	14	16
	All Dev.	25	28	15	8	15	14	24	18
Excluding fuels	SSA	15	14	21	17	3	3	14	14
	All Dev.	25	28	15	21	15	23	24	24

Source: UNCTAD Data Base on Trade Control Measures.

Notes:

a. The broad group of NTBs used in the analysis incude para-tariff measures such as tariffs with quota, seasonal tariffs, supplementary tariffs, etc., variable levies, countervailing and anti-dumping actions, quantitative restrictions, the surveillance of quantities and/or prices of imports, and various types of licensing. Health and safety regulations, technical standards and excise taxes are excluded. While data on NTBs pertain to 1986, trade data employed to calculate frequency and coverage ratios are of 1984.

b. Sectors are defined in SITC as the following: food SITC 0 + 1 + 22 + 4, agricultural raw materials SITC 2 less (22 + 27 + 28), ores and metals SITC 27 + 28 + 68, mineral fuels SITC 3, chemicals SITC 5, manufactures SITC 6 to 8 less 68, all sectors SITC 0 to 9.

c. Frequency Ratio gives the number of trade flows covered by NTBs as a share of the total number of trade flows where the number of trade flows is the number of national tariff lines times the number of trading partners in which imports originate in each tariff line in the base year.

d. Trade Coverage ratio measures the value of imports affected by selected NTBs as a share of all imports.

e. All Dev. stands for all developing countries.

incidence indices are somewhat irrelevant, as we can look into the products and barriers in a detailed fashion - a task which would have been insurmountable in the case of major exporters.

We start this detailed investigation with the NTBs faced by SSA. Table 5 lists the individual NTBs and gives the value of imports which were affected by the respective barrier in the EEC, Japan and the US. Individual NTBs are not mutually exclusive in their coverage of imports. The information provided in Table 5 considerably modifies the impression of the relatively high NTB protection conveyed by Table 4. The predominant tool used by Japan against SSA happens to be import authorization (covering US$133 million worth of imports). In the US, the largest item was flexible import fees -- the counterpart of the EEC's variable levies -- used in combination with bilateral quotas (US$82 million) followed by MFA quotas (against imports from Mauritius worth US$60 million in 1986).

In the case of the EEC, the relatively large array of NTBs and the volume of trade they cover give a partially misleading impression. Most of these NTBs relate to agricultural products, especially foodstuff which are regulated by the Common Agricultural Policy (CAP). However, while CAP is an extremely protectionist mechanism, for the beneficiaries of the Lomé Convention it implies certain rewards. For instance, while other exporters are subject to extremely high variable levies, 1/ for the ACP countries - including the SSA - these levies are often reduced or eliminated. In turn SSA countries have quota allocations under which they can sell their produce at artificially high EEC domestic prices - several times the price prevailing in

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1/ Variable levies are used to maintain an artifically high guaranteed domestic price in the face of fluctuating international market prices.

Table 5: List of NTBs Facing Sub-Saharan Africa's Exports in the EEC, Japan and the US and Value of Trade Affected

NTB[a]	Imports[b] (million US$) from SSA affected in EEC	Japan	US
Tariff quotas	44.0	9.3	-
Seasonal tariffs	41.3	-	-
Anti-dumping duties	-	-	0.1
Countervailing duties	-	-	0.4
Variable levies	372.4	-	-
Variable component	4.9	-	-
Flexible import fees	-	-	82.0
Licenses	395.6	0.1	-
Import authorization	-	133.1	-
Global quotas, unallocated	-	33.8	-
Global quotas, allocated	-	-	0.2
Bilateral (country) quotas	1.2	-	82.2
MFA quotas	-	-	59.9[e]
Seasonal quotas	15.2	-	-
Quotas not elsewhere spec.	2,984.7[c]	-	-
Surveillance license	711.4[d]	-	-
Retrospective surveillance	1.3	-	-
Community surveillance	12.1	-	-
Reference prices	118.8	-	-
Price surveillance	1.5	-	-
Anti-dumping investigations	-	-	0.2
Countervailing duty investigations	-	-	0.6
Sole importing agency	-	12.5	-
(Memo item: total imports)	(18,266.4)	(1,005.0)	(7,943.5)
(excl. fuels)	(9,063.3)	(1,005.0)	(1,722.2)

Source: UNCTAD Data Base on Trade Control Measures.

Notes:

a. All NTBs in place during 1986, except health and safety regulations, prohibition for conservation, etc., technical standards and excise taxes.
b. 1984 imports. The reported import coverages of the individual NTBs are not mutually exclusive and hence there can be overlapping up to a hundred percent.
c. The bulk of this amount, US$ 2.7 billion, was mineral fuels subject to quota systems in some EEC member states.
d. US$ 49 million of this amount was mineral fuels.
e. 1986 MFA import value.

international markets. These special provisions obviously cannot be taken into account in Tables 4 and 5, and consequently, they are not distinguished from the purely restrictive barriers. To clarify this matter, important items are scrutinized in Section 6.3.1.

In the EEC, national quota systems constitute the biggest item in terms of import coverage (nearly US$ 3 billion). The bulk of the imports subject to this tool is petroleum - whose flow is monitored in compliance with national energy conservation policies, particularly by France.

To conclude this Section; the incidence of NTBs facing SSA was somewhat lower compared to that for all developing countries taken together. However, there was a more significant difference if one took into account that (i) over 20 percent of all developing countries' non-fuel exports encountered "hard core" NTBs in the OECD markets (Laird and Yeats (1989)), (ii) while the nature of the NTBs most frequently faced by SSA were relatively "soft". The following Section (Section 6) further narrows down the focus of the investigation by considering the SSA countries and their products individually.

6. TARIFF AND NON-TARIFF PROTECTION BY EXPORTER AND PRODUCT

This Section addresses the following questions: (i) which SSA countries were most affected by tariff and non-tariff protection, (ii) what was the depth of preference margins in tariffs for individual countries, (iii) in which products did exporters encounter tariff "peaks", (iv) on which products were specific NTBs concentrated, (v) in the EEC, did NTBs allow preferential treatment of SSA, and, (vi) did the incidence of NTBs on SSA countries exports intensify during the 1980s? Table 6 summarizes the country

Table 6: Weighted Tariff Averages and NTB coverage on Sub-Saharan African Countries' Exports in the EEC, Japan and the US

Exporter	EEC Imports[a] m. US$	EEC Weighted average tariffs[b], % facing the exporter	EEC Weighted average tariffs[b], % (facing all developing)	EEC NTB[c] coverage ratio, %	JAPAN Imports[a] m. US$	JAPAN Weighted average tariffs[b], % facing the exporter	JAPAN Weighted average tariffs[b], % (facing all developing)	JAPAN NTB[c] coverage ratio, %	US Imports[a] m. US$	US Weighted average tariffs[b], % facing the exporter	US Weighted average tariffs[b], % (facing all developing)	US NTB[c] coverage ratio, %
Angola	600.2	0.0	(0.7)	0.1	0.6	0.0	(0.0)	0.0	599.7	0.7	(0.8)	0.0
Benin*	109.8	0.0	(0.5)	1.6	1.2	4.1	(0.5)	0.0	0.1	0.7	(4.0)	0.0
Botswana	60.2	0.0	(1.7)	71.2	0.2	0.8	(0.1)	23.8	2.3	1.8	(15.3)	0.0
Burkina Faso*	41.9	0.0	(1.3)	13.4	2.6	0.6	(1.3)	0.0	0.9	8.6	(11.1)	0.0
Burundi*	104.5	0.0	(1.9)	0.1	1.8	0.0	(0.0)	0.0	10.0	0.2	(1.7)	0.0
Cameroon	1,255.2	0.0	(0.9)	0.6	42.2	1.1	(3.2)	0.1	230.[illegible]	0.8	(3.5)	0.1
Cape Verde	2.1	0.0	(2.1)	1.4	..	..	..	..	1.0	0.0	(0.0)	0.0
C.A.R.*	109.0	0.0	(1.6)	0.5	5.6	0.0	(0.0)	0.1	3.0	0.4	(5.0)	0.0
Chad*	43.6	0.0	(1.6)	0.0	1.5	0.0	(0.0)	0.0	0.1	29.9	(32.0)	0.0
Comoros*	12.6	0.0	(2.2)	0.4	0.2	0.2	(0.1)	6.1	3.5	0.7	(7.5)	0.0
Congo	419.8	0.0	(0.6)	0.7	5.6	0.0	(0.0)	0.0	161.1	0.6	(0.7)	2.7
Djibouti*	3.4	0.0	(1.9)	14.5	0.1	1.9	(5.0)	38.5	0.2	2.2	(6.0)	0.0
Ethiopia*	236.8	0.0	(1.7)	4.0	43.5	0.2	(0.1)	0.6	73.0	0.3	(3.5)	0.0
Eq. Guinea*	36.3	0.0	(1.5)	0.1	..	..	..	..	0.2	17.0	(27.7)	0.0
Gabon	750.5	0.0	(0.9)	2.2	15.7	0.0	(0.0)	0.0	195.1	0.7	(3.5)	0.3
Gambia*	14.2	0.0	(1.9)	27.8	8.3	0.5	(4.0)	100.0	0.5	0.0	(1.2)	0.0
Ghana	344.0	0.0	(1.4)	0.3	74.1	0.4	(1.2)	8.7	190.8	0.0	(1.8)	0.1
Guinea*	250.5	0.0	(1.6)	0.2	1.1	0.8	(4.3)	17.1	89.1	0.0	(4.0)	0.0
Guinea-B.*	4.3	0.0	(1.1)	30.0	0.3	0.5	(4.0)	100.0	0.8	0.7	(4.3)	0.0
Ivory Coast	2,102.9	0.0	(1.2)	2.1	43.8	0.2	(0.1)	0.1	423.9	0.1	(4.1)	2.2
Kenya	586.8	0.0	(1.7)	11.7	12.3	3.1	(1.7)	10.1	140.6	0.6	(7.1)	0.1
Lesotho*	2.8	0.0	(1.8)	5.2	0.1	0.0	(5.6)	0.0	3.3	13.6	(18.6)	0.3
Liberia	526.1	0.0	(1.2)	0.6	91.7	0.0	(0.0)	0.1	80.8	0.0	(6.1)	0.0
Madagascar	193.9	0.0	(1.4)	6.5	44.3	1.6	(1.9)	72.7	62.4	0.0	(2.4)	7.0
Malawi*	172.9	0.0	(1.7)	6.9	14.1	0.0	(0.0)	99.9	17.3	11.1	(3.7)	0.1
Mali*	57.8	0.0	(1.3)	2.0	2.9	4.3	(3.4)	0.0	7.8	1.9	(7.9)	0.7
Mauritania*	206.0	0.0	(1.3)	15.8	135.4	0.7	(4.1)	100.0	2.0	4.3	(11.5)	1.2
Mauritius	459.9	0.0	(2.1)	47.5	1.3	2.6	(5.1)	46.9	115.7	14.4	(8.7)	61.2
Mozambique*	22.0	0.0	(1.0)	64.2	17.4	2.9	(2.6)	95.9	18.4	0.2	(2.5)	47.5
Namibia	..	..	..	..	..	..	..	..	18.4	0.4	(1.4)	0.0

Table 6 concl.

Exporter	EEC				JAPAN				US			
	Imports[a]	Weighted average tariffs[b], %		NTB[c]	Imports[a]	Weighted average tariffs[b], %		NTB[c]	Imports[a]	Weighted average tariffs[b], %		NTB[c]
	m. US$	facing the exporter	(facing all developing)	coverage ratio, %	m. US$	facing the exporter	(facing all developing)	coverage ratio, %	m. US$	facing the exporter	(facing all developing)	coverage ratio, %
Niger*	176.5	0.0	(0.6)	0.3	0.1	0.0	(0.0)	0.0	8.6	0.9	(4.4)	0.2
Nigeria	4,409.1	0.0	(0.8)	0.1	5.1	2.6	(3.1)	85.6	2,519.6	0.7	(2.0)	0.1
Reunion	..	..	..	..	..	..	..	..	..	..	..	..
Rwanda*	146.6	0.0	(1.8)	0.2	1.7	0.0	(0.0)	13.5	10.8	0.3	(5.9)	0.0
Sao Tome*	6.3	0.0	(2.3)	0.7	..	..	..	..	1.0	1.9	(3.5)	0.0
Senegal	299.1	0.0	(1.4)	24.6	26.8	3.4	(2.3)	71.4	5.4	2.6	(9.2)	0.1
Seychelles	22.0	0.0	(2.1)	91.1	0.2	3.5	(4.6)	95.9	6.6	3.3	(6.7)	0.0
Sierra Leone*	138.1	0.0	(1.2)	7.3	0.1	3.0	(3.0)	100.0	10.4	0.7	(5.8)	0.0
Somalia*	22.9	0.0	(2.2)	3.6	0.1	0.0	(0.0)	93.5	0.4	6.1	(8.7)	0.0
Sudan*	118.2	0.0	(1.2)	13.3	43.5	0.0	(0.1)	4.3	12.2	1.1	(18.5)	0.2
Swaziland	119.9	0.0	(2.4)	77.8	9.0	0.0	(0.0)	0.0	18.6	2.2	(7.9)	56.4
Tanzania	260.7	0.0	(1.6)	7.0	22.2	0.2	(1.3)	12.1	11.9	0.4	(1.0)	0.0
Togo*	158.2	0.0	(1.3)	2.9	5.2	0.0	(0.0)	0.2	24.1	0.0	(3.8)	0.0
Uganda*	295.0	0.0	(1.6)	0.1	18.2	0.0	(0.0)	0.0	133.0	0.0	(1.6)	0.0
Zaire	1,200.2	0.0	(0.8)	0.2	54.1	0.0	(0.1)	3.3	221.0	0.5	(1.0)	0.0
Zambia	264.9	0.0	(2.1)	0.3	202.8	0.0	(0.1)	0.1	63.1	0.7	(2.0)	0.0
Zimbabwe	453.3	0.0	(2.0)	22.6	61.3	1.2	(0.1)	1.6	69.1	3.2	(8.1)	10.4

Source: GATT Tariff Study computer files and UNCTAD Data Base on Trade Control Measures.

Notes:

a. 1986 imports. Apparently irrelvant items such as return goods, postal packages, stamps etc. are excluded from the trade values reported.

b. Trade weighted actual average tariffs in 1986, including preferences. The average for the individual SSA country is based on its own trade weights in the market concerned. The corresponding average for "all developing" is restricted to the same products - however uses aggregate trade weights of all developing countries.

c. All NTBs in place during 1986, except health and safety regulations, prohibition for conservation, etc., technical standards and excise taxes. This broad definition of NTBs includes para-tariffs, i.e. tariffs with quota, seasonal tariffs, supplemetary tariffs, etc. In the case of the EEC, the NTBs are confined to those applied uniformly by the Community, leaving out those NTBs used only by some member State(s).

* Least developed countries (LLDCs) according to the UN. Mozambique was added to the list in 1988.

specific information for SSA on trade, tariffs and NTBs in the EEC, Japanese and the US markets. Exporter and product specific data on NTBs in the respective markets are provided in Appendix Tables 4A o C.

6.1. Tariffs and Preference Margins

Weighted average tariffs, including preferences, encountered by individual SSA countries and the averages in the corresponding products for the "control group" covering all developing countries were computed in the same fashion as the overall averages reported in Section 5.1. Furthermore, as a second check of the underlying tariff rates, the corresponding unweighted tariff averages were also calculated (reported in Appendix Table 3).

The results revealed that, in the EEC, where SSA enjoyed virtually duty-free treatment, 1/ weighted preference margins were around two percentage points. The smallness of these margins were due to (i) the relatively low level of EEC's MFN and GSP tariffs (given that most highly protected foodstuffs were covered by variable levies with no fixed component) 2/, (ii) the fact that SSA had little to export in processed goods with higher tariffs, and (iii) the preferences which the Mediterranian associates of the EEC enjoyed.

1/ Unweighted tariff averages in the EEC for 14 SSA countries were non-zero, yet a fraction of one percent (see Appendix Table 3). This was due to a handful of items and seasonal tariffs on some fruits. In most of these cases, SSA enjoyed some preference margin over other developing countries.

2/ These items which constitute roughly 10 percent of tariff-lines in the EEC (see Erzan and Karsenty (1989)) are excluded from the tariff averages.

In Japan and the US, the SSA countries were beneficiaries of the GSP, which implied duty-free status in the US for eligible products. 1/ Weighted average tariffs encountered by SSA countries in the Japanese market ranged from zero to four percent. Weighted preference margins were generally negligible. In ten cases, SSA countries faced slightly higher weighted average tariffs compared to the control group of all developing countries. This was not, however, due to less favorable treatment of SSA as revealed by arithmetic averages of the underlying tariffs in Appendix Table 3. 2/

While the weighted average tariffs facing most SSA countries in the US were zero or under one percent, for five countries - Chad, Equatorial Guinea, Lesotho, Malawi and Mauritius - this rate was between 10 to 30 percent. Also Malawi and Mauritius encountered considerably higher tariff facing most SSA countries in the US averages compared to the aggregate control group of all developing countries. Behind all these cases were the extremely high tariffs on textile yarn and clothing items which were excluded from the GSP. 3/ The relative weight of the few high tariff products in SSA's exports accounted for this outcome. Otherwise, almost all other SSA countries had a weighted average preference margin often above 4 percent in the US market.

1/ Except the two OPEC members, Gabon and Nigeria, and Ethiopia, and Namibia, all SSA countries were beneficiaries of the US GSP scheme.

2/ Although the tariff averages were limited to the same products for comparison, differences in the trade weights used (the country's export basket versus overall trade weights of developing countries in that market) generated this result concerning weighted averages.

3/ Even the most generous US scheme for developing countries, the Caribbean Basin Initiative (CBI), excludes textiles and clothing. The only exception is for imports under the off-shore assembly provision 807, some of which enter the US duty-free (see World Bank (1988)).

6.2. Non-Tariff Protection

While most SSA countries apparently encountered some NTBs in the EEC, this was not the case in Japan, and especially, not in the US (see Table 6). 1/ The main reason for the difference in the NTB burden on the SSA countries in the EEC versus Japan and the US was the volume and diversity of exports to the former market. A great majority of the SSA countries had exports to the EEC amounting to several hundred million US$ - covering a relatively wide range of products - as opposed to exports worth a few hundred thousand or a few million US$ to the other two main markets. The second major reason for the difference in the apparent NTB incidence relates to the penetration of some SSA exports into otherwise extremely restricted EEC markets for temperate zone agricultural products. While lack of trade gives a rosy picture despite NTBs, market penetration makes the NTBs visible.

Excluding the major petroleum exporters, which encountered quota systems on fuels in some member States of the Community, 2/ nine countries - Botswana, Gambia, Guinea Bissau, Mauritius, Mozambique, Senegal, Seychelles, Swaziland and Zimbabwe - had over 20 percent of their export products affected by NTBs in the EEC market. Among them, Guinea Bissau was the only one with exports less than US$ 10 million to the EEC. All these countries, except Swaziland and Zimbabwe, also had very high NTB incidences in Japan, exceeding 90 percent in most cases. However, with the exception of Mozambique and

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1/ NTB coverage ratios reported in Table 6 for individual SSA countries are not fully comparable with the aggregates given in Tables 4 and 5 due to the fact that the underlying import values pertain to different years (1986 versus 1984). Another difference concerning the EEC is that Table 6 pertains to NTBs applied uniformly by the Community, leaving out those NTBs used only by some member State(s).

2/ Not accounted for in Table 6 which pertains to NTBs applied uniformly by the Community.

Senegal, all had exports to Japan below US$10 million. There were seven other SSA countries in this market which had high NTB coverage. These were Djibouti, Madagascar, Malawi, Mauritania, Nigeria, Sierra Leone and Somalia. Three of them - Djibouti, Sierra Leone and Somalia - exported less than US$ 100 thousand to Japan.

Finally, in the US, it was only Mauritius, Mozambique and Swaziland which had NTB coverage ratios over 20 percent. Madagascar and Zimbabwe were the only others facing NTBs to a significant extent.

6.3. NTBs By Exporter and Product

Documenting the limited number of specific NTBs affecting the export products of the individual SSA countries in the Japanese and the US markets is rather straightforward. In the EEC, however, the number of products involved are far greater and some of the apparent NTBs actually allow preferential treatment of SSA. We should also remember the differences in the magnitude of the three markets' imports from SSA and the share of petroleum in this: (i) the EEC, total over US$18 billion, approximately half of it non-fuel, (ii) Japan, around US$1 billion, no petroleum, and (iii) the US, roughly US$8 billion yet less than one forth of it non-fuel.

6.3.1. The EEC Market

In 95 product categories, 1/ SSA countries' exports to the EEC were affected by NTBs (see Appendix table 4A). When fuels - which were subject to quotas under energy policies of some EEC States - were excluded, imports from

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1/ Defined at the 4-digit aggregation level of EEC's import classification - which is at this level identical with the CCCN.

SSA subject to NTBs were US$1.3 billion, or roughly 14 percent of non-fuel imports. These products can be studied under four large clusters: (i) agricultural products, mostly foodstuff, subject to the CAP, (ii) textiles and clothing, exempt from the MFA in the case of SSA, nevertheless somewhat affected by it, (iii) precious and semi-precious stones and ores and minerals, and (iv) other manufactured goods.

In addition to reduced levels of barriers in most agricultural goods, in five products - sugar, beef, rice, bananas and rum - imports from ACP countries are regulated by special "regimes" or "protocols." Other than rice and rum which had little relevance for Africa, these provided guaranteed export revenues for the SSA countries. The arrangement in sugar is an outright income transfer mechanism, not different from the deal the European farmers in the EEC get. For the stipulated annual ceilings, SSA countries receive the artificially high EEC prices and pay no duties or variable levies. To provide the EEC with the agreed quantities of sugar is not only a right but as well a duty for the SSA suppliers. In beef, the SSA countries enjoy exemption from duties of around 20 percent - and Botswana and Kenya have as well major reductions in the variable levies - subject to annual ceilings, which are often highly utilized. Under the banana protocol, the EEC pledges to provide and maintain the advantages of the ACP countries in market access. Particularly in the British, French and Italian markets, ACP countries enjoy guaranteed market shares provided by quotas. However, ACP countries, including those in SSA, often failed to fully exploit this advantage.

An inspection of Appendix table 4A reveals that imports of meat, including beef, from Botswana, Djibouti, Ivory Coast, Madagascar, Swaziland and Uganda totaled US$43 million (in 1984). The NTBs facing products falling in this category were variable levies, licenses and tariff quotas. 1/ The information conveyed here is that when annual ceilings are surpassed, exemption from or reduction in tariffs and variable levies may no longer hold. Sugar imports from Congo, Ivory Coast, Kenya, Madagascar, Malawi, Mauritius, Swaziland, Tanzania and Zimbabwe totaled US$271 million. Licenses and variable levies are listed as the effective NTBs for the same reason explained above. Bananas from Benin, Cameroon, Guinea, Ivory Coast, Madagascar and Togo, worth US$86 million came under quotas devised for promotion of these imports.

A large number of SSA countries supplied the EEC market with fish and shellfish totaling to US$72 million. Some of these products were subject to reference prices and licenses for the purpose of surveillance. In most of these goods, the EEC's Common Customs Tariff was around 20 percent and ACP countries were exempt from it. However, if the landed import price was below a certain reference price, they were subject to a compensatory charge. Similarly, imports of prepared or preserved fish from Cape Verde, Ivory Coast and Senegal, worth US$73 million, were subject to these provisions. Fruits and vegetables were also important export items for a large number of SSA countries. Most of these were exempt from tariffs, yet some were subject to tariff quotas according to which tariffs were restored above certain annual ceilings. For some, reference prices applied. Especially in fruits, there were seasonal tariffs, often with a reduced rate for the ACP countries.

In textiles and clothing, despite free access provisions of the Lomé Convention, VERs (voluntary export restraints) have been imposed on Mauritius,

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1/ The list of NTBs given in the Appendix Table relates to one or more - not necessarily all - products in the product group. Similarly, not necessarily, all exporters listed are affected.

in France and the UK. Furthermore, ACP countries' exports of MFA products were put under import surveillance. Imports into France from the Ivory Coast and Senegal faced some limitations.

Precious and semi-precious stones, and minerals and metals (mostly copper) constituting a very large category of imports, worth nearly half a billion US$ were subject to surveillance licenses - which, however, amounted to a monitoring measure rather than a restrictive barrier.

The last cluster of goods, diverse manufactured products - many of them originating in duty-free zones of SSA countries - were subject to surveillance licenses. Some of these products, such as radios, also came under quotas in some member States of the EEC, notably in France, Greece and Italy. We have no information on the restrictive effect of these measures. Nevertheless, the trade values involved were extremeley small and the statistics include some irrelevant items such as used ships, etc.

Finally, we found no evidence of a significant deterioration in the preferential treatment enjoyed by SSA in higher levels of processing. For instance, meat, fish, fruits and vegetables appeared to penetrate the market not with much greater formality or difficulty when they were in prepared or preserved forms. In preparations which used inputs subject to variable levies - such as macaroni made of hard wheat - the "variable component" charged at the border for the final product was often reduced or eliminated for the SSA countries.

6.3.2. The Japanese Market

Fresh, chilled or frozen fish (excluding fillets) and other produce from the sea, such as, shrimps, prawns, lobsters, squids and octopus, adding up to approximately US$130 million, constituted the bulk of SSA's exports to

Japan which encountered NTBs (see Appendix Table 4B). These products were all subject to import authorization and some of them, worth around US$20 million, were under global quotas as well.

Import authorization in Japan is a general measure, used mainly to monitor imports of goods considered "sensitive", particularly vis-á-vis domestic production. In cases where informal VERs ('voluntary' export restraints) exist, the monitoring may have important implications. In the absence of other arrangements, however, as is often the case for SSA countries, their restrictive impact is usually negligible. A number of exporters, such as Djibouti and Sierra Leone, which had extremely small export volumes covered by import authorization fall into this category. On the other hand, for example in the case of Mauritania, the largest supplier of octopus in the Japanese market, the authorizations might be more than a sheer formality.

Global quotas - with no country allocations - are potentially more potent barriers. As they are administered on a first-come-first-serve basis, at times, they may hinder even the small quantities which the SSA countries supply. In addition to some sea products, global quotas affected a variety of goods, most importantly chromium, niobium and tantalum ores from Madagascar, Nigeria, Rwanda and Zaire. Other major mineral exports of SSA, manganese from Congo, Gabon and Ghana were subject to tariff quotas. 1/ Details of these barriers are not readily available. However, it can be expected that, in a natural resource poor country like Japan, with some exceptions, their main purpose would not be to curtail imports. Tariff quotas also covered leather

1/ This reflected the general transition in the Japanese foreign trade regime from global quotas to tariff quotas since the mid 1980s.

from Tanzania and maize supplied by Zimbabwe. Textile fabrics, fibers, cordage and ropes from Burkina Faso, Kenya and Tanzania were subject to import authorization only. Imports of tobacco in Japan are virtually under the monopoly of the State. Hence tobacco supplied by Malawi and Zimbabwe fell under this constraint.

6.3.3. The US Market

Sugars, syrups and molasses worth over US$80 million was the main item encountering NTBs in the US (see Appendix Table 4C). These products, originating from Congo, Madagascar, Malawi, Mauritius, Mozambique, Swaziland and Zimbabwe, were subject to country quotas as well as flexible import fees - the counterpart of the variable levies of the EEC. Due to the artificially high US domestic prices, exports were profitable for the SSA countries despite the import fees. Consequently, the country quotas were generally filled or highly utilized, implying that the quantitative restrictions were effective barriers in most cases.

The second major NTB in the US facing SSA was the MFA quotas on textile and clothing exports of Mauritius totaling US$60 million (in 1986). These quotas were also fully or highly utilized. However, while this was an effective constraint, some of the production in Mauritius might not have been there in the first place had there been no MFA restrictions on exports of major developing country suppliers of textiles and clothing.

Sudan's cotton exports worth around two hundred thousand US$ was also subject to bilateral quotas. Furthermore, miscellaneous edible preparations with roughly the same value from Burkina Faso, Ivory Coast, Kenya, Mali and Swaziland were subject to global quotas with allocations. Kenya's exports of carnations and other cut flowers, totaling three hundred thousand US$ dollars, were subject to anti-dumping investigations and some of them came under anti-dumping duties. Finally, less than half a million dollars worth of wire rods of iron and steel from Zimbabwe triggered countervailing duties in the US.

6.4. Change in the Incidence of NTBs

The incidence of NTBs on a country's exports might change over time as a result of (i) changes in the destination of exports - assuming differences in NTB usage across markets, (ii) changes in the commodity composition of exports, and (iii) changes in the trade practices within each market.

As observed in Section 3, there were no significant changes in the commodity composition and destination of most SSA countries' exports over the period under consideration. However, the considerable intensification in the usage of NTBs by developed market economies in the 1970s and the 1980s (see Laird and Yeats (1988) and UNCTAD (1988)) could have affected SSA as well. The earliest NTB data comparable with the 1986 information reported in this paper pertains to 1981. Using these, NTB coverage ratios were computed for individual SSA countries' in the EEC, Japanese and the US markets. For the great majority of the SSA countries, however, there was no or little change in the share of their exports covered by NTBs. The main exceptions were the oil exporting SSA countries. Due to the abolition of import surveillance on oil in the US, the shares of total exports from these six countries (Angola, Cameroon, Congo, Gabon, Nigeria and Zaire) that were subject to NTBs fell drastically.

The finding here, that SSA countries were not adversely affected in any significant way by the general intensification of NTB protection during the 1980s, is mainly due to the commodity composition of their exports. Labor intensive manufactures from developing countries, which triggered most of the NTB action in developed market economies - and nevertheless achieved a dramatic expansion - constitute only a minute portion of SSA's exports.

The longer-term evolution of the incidence of the NTBs SSA encountered could not be studied due to the fact that comparable information was not readily available on earlier periods. However, it can be safely stated that the increase in the relative share of agricultural products in SSA countries' exports coupled with a decline in non-fuel mineral and ores has made SSA more vulnerable to protection.

7. SUMMARY AND CONCLUSIONS

Two main questions were addressed in this paper: (i) how did the incidence of protection encountered by SSA's exports in the major industrial market economies compare with that faced by all developing countries, and (ii) to what extent protection in these markets might have constrained SSA's export growth?

The findings on the first issue were conclusive. On the whole, SSA had a better deal in terms of both tariff and non-tariff protection in all three markets. This was in part due to special preferential treatment, especially in the EEC, and in part a consequence of the commodity composition of its exports, heavy in primary goods.

As to the second question, there was no compelling evidence suggesting that protection in the major industrial markets has been a significant constraint on SSA's export growth. In fact we found evidence to the contrary. Some SSA countries have benefitted from protection restricting

(MFA) - and in some cases virtually barring (CAP) - other developing countries' exports.

In cases where SSA's exports were subject to "hard core" barriers, they nevertheless had most often an advantage over other developing countries in market access. This finding rules out protection in the major markets as a cause of the poor relative export performance of SSA countries with respect to other developing countries. We do not, however, in any definite manner rule out the negative impact of protection on SSA's exports: most importantly, because we lack information on the actual application of the various license and authorization requirements which affect the bulk of SSA's exports. This, and a more thorough investigation of the true value of the preferential treatment SSA countries receive for their major export products, especially in the EEC, are among the issues for further research.

We have identified two other developments pertaining to the demand-side which might have had some bearing on SSA's poor export growth. One was the increase in the share of agricultural products in SSA countries' exports coupled with the decline in non-fuel minerals and ores. This has made SSA potentially more vulnerable to protection. The second development, was the slow growth in the EEC, the traditional market for Africa. The growth in the US market for developing countries' exports was over twice that rate in Europe.

Finally, we would like to remind the reader that, evaluations of the type undertaken in this paper necessarily have an *ex post* and myopic nature, which becomes evident in forward looking endeavors such as the current Uruguay Round of Multilateral Trade Negotiations in the auspicies of the GATT. Apparently, SSA has very little to gain from multilateral trade liberalization in the short term; in fact it has much to lose on several accounts. For instance, if there will be a substantial tariff reduction in tropical products (accompanied by an adjustment in GSP rates), ACP preferences in the EEC will be severely eroded. Similarly, SSA would suffer in the short run if agricultural protection and subsidies in this market were to be reduced. The abolition of MFA might cut down some of the textile and clothing production in SSA. The simple fact remains to be that, however, protection in the major industrial market economies did not harass SSA countries in general, mainly because SSA did not have much to export in the first place. The longer run interest of the SSA countries, like any other country for that matter, lies in a liberal, non-discriminatory and stable trade environment. In this context, as the industrially more advanced developing countries constitute an increasing share of this environment, improvements in the conditions of market access in these countries will also be of prominent importance for SSA.

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Appendix Table 1: Export Structure of SSA Countries by Main Product Category

percent[a]

Country	Year[b]	Primary Commodities					Manu-factures	Others
		Total	Food	Agric.	Fuels	Ores	Total	Total
	1970	79	45	8	13	12	21	-
Angola	1981	88	5	-	82	-	12	-
	1970	89	71	18	-	-	11	-
Benin	1982	53	36	12	4	1	46	1
	1970	97	68	28	-	1	3	-
Burkina Faso	1983	90	34	56	-	-	10	-
	1970	99	85	10	-	4	1	-
Burundi	1985	91	90	1	-	-	5	4
	1970	92	63	19	-	10	8	-
Cameroon	1987	73	40	16	18	9	18	-
	1970	94	81	2	-	11	6	-
Cape Verde	1984	97	84	1	3	9	3	-
	1970	56	26	29	-	-	44	-
C.A.R.	1980	74	31	43	-	-	26	-
	1970	95	24	71	-	-	2	3
Chad	1975	92	16	67	8	1	8	-
	1970	71	18	52	1	-	29	-
Congo	1985	96	1	2	93	-	3	-
	1970	98	86	11	1	1	2	-
Ethiopia	1985	99	71	18	10	-	1	-
	1970	91	2	33	43	14	9	-
Gabon	1983	94	-	7	80	7	6	-
	1970	100	100	-	-	-	-	-
Gambia	1977	99	99	-	-	-	-	1
	1970	100	78	9	-	13	-	-
Ghana	1981	99	51	6	12	30	1	-
	1970	98	94	4	-	-	2	-
Guinea-Bissau	1980	87	85	2	-	-	8	4

Appendix Table 1 (cont.)

Country	Year[b]	Primary Commodities					Manu-factures	Others
		Total	Food	Agric.	Fuels	Ores	Total	Total
Ivory Coast	1970	94	68	25	1	1	6	-
	1985	90	68	12	10	-	9	1
Kenya	1970	88	63	12	12	1	12	-
	1983	89	59	6	21	13	11	-
Liberia	1970	97	4	20	-	74	2	1
	1984	99	9	26	-	65	-	1
Madagascar	1970	93	79	5	4	5	7	-
	1986	91	81	3	2	5	8	-
Malawi	1970	96	88	8	-	-	3	1
	1983	96	96	-	-	-	4	-
Mali	1970	90	65	24	-	1	10	1
	1982	99	40	57	-	-	2	1
Mauritania	1970	99	8	3	-	88	1	-
	1984	99	50	-	-	49	-	1
Mauritius	1970	98	98	-	-	-	2	-
	1983	70	69	-	-	-	30	-
Mozambique	1970	91	57	23	8	2	9	-
	1984	87	69	11	6	1	1	12
Niger	1970	96	91	5	-	-	3	1
	1981	98	16	1	1	80	2	-
Nigeria	1970	99	31	5	58	4	1	-
	1981	99	2	-	97	-	-	1
Reunion	1970	95	94	-	-	1	5	-
	1987	89	88	-	-	1	10	-
Rwanda	1970	99	61	3	-	35	-	1
	1980	100	80	10	-	10	-	-
Senegal	1970	81	65	4	3	9	19	-
	1981	80	27	2	37	14	20	-

Appendix Table 1 (concl.)

Country	Year[b]	Primary Commodities					Manu-factures	Others
		Total	Food	Agric.	Fuels	Ores	Total	Total
	1971	96	90	1	-	5	4	1
Seychelles	1985	93	11	-	82	-	7	-
	1970	40	16	1	3	20	60	1
Sierra Leone	1983	71	33	1	4	34	29	-
	1970	94	86	8	-	-	5	1
Somalia	1981	100	98	2	-	-	-	-
	1970	100	24	74	1	1	-	-
Sudan	1981	99	59	36	4	1	1	-
	1970	87	50	30	7	1	13	-
Tanzania	1981	89	63	21	-	5	11	-
	1970	94	67	2	-	25	6	-
Togo	1981	85	26	6	1	52	15	-
	1970	100	68	22	-	9	-	-
Uganda	1976	100	90	7	1	2	-	-
	1970	93	12	3	-	78	7	-
Zaire	1978	93	29	8	1	55	5	2
	1970	100	1	-	-	99	-	-
Zambia	1982	93	-	-	-	93	3	4
	1976	86	36	9	1	40	13	-
Zimbabwe	1984	80	36	12	1	31	16	4

Source: UNCTAD Handbook of International Trade and Development Statistics, 1988, Table 4.1.

Notes:

a. Due to rounding up, the percentages do not always add up to a hundred.
b. 1970 or the nearest year and the latest year available for each country.

Appendix Table 2: Export Structure of SSA Countries by Main Destination

percent[a]

Country	Year[b]	Industrial Market Economies				Developing Countries		Socialist Countries
		Total	EEC	US[c]	Japan	Total	Africa	Total
	1970	92	66	18	7	6	.5	-
Angola	1981	68	27	37	1	28	2	2
	1970	81	66	5	10	19	18	19
Benin	1981	69	56	1	9	24	20	24
	1970	47	31	-	15	51	49	2
Burkina F.	1983	35	29	1	4	54	26	11
	1970	96	32	59	5	4	3	-
Burundi	1986	90	62	5	2	7	6	-
	1970	86	73	10	3	10	8	4
Cameroon	1987	78	68	7	1	20	18	2
	1975	96	79	-	-	4	4	-
Cape Verde	1984	50	46	-	-	50	50	-
	1970	92	71	-	4	8	7	-
C.A.R.	1985	96	91	-	-	4	4	-
	1970	71	71	-	-	29	29	-
Chad	1982	65	63	-	2	28	28	-
	1970	81	65	2	-	16	13	4
Congo	1985	95	35	60	-	5	3	-
	1970	81	20	50	6	17	6	1
Ethiopia	1985	71	49	11	10	20	6	9
	1970	72	63	4	1	28	9	1
Gabon	1979	66	40	19	1	31	-	3
	1970	99	87	-	-	1	1	-
Gambia	1980	68	68	-	-	30	30	-

Appendix Table 2 (cont.)

Country	Year[b]	Industrial Market Economies				Developing Countries		Socialist Countries
		Total	EEC	US[c]	Japan	Total	Africa	Total
	1970	81	47	20	7	8	1	11
Ghana	1983	68	32	6	5	20	16	12
	1980	91	56	35	-	9	6	-
Guinea	1983	89	52	37	-	10	5	-
	1970	94	94	-	-	7	3	-
Guinea B.	1981	83	62	-	-	8	8	10
	1970	90	69	19	2	8	8	1
Ivory C.	1985	72	58	13	1	18	16	6
	1970	64	41	12	2	22	12	3
Kenya	1984	56	45	6	1	35	24	1
	1970	98	67	23	8	2	1	-
Liberia	1984	92	71	20	1	6	3	2
	1970	70	43	23	3	27	20	1
Madagascar	1986	85	58	15	11	9	4	5
	1970	77	65	4	-	21	19	-
Malawi	1986	88	58	10	7	12	11	-
	1970	29	25	-	4	63	62	2
Mali	1979	76	71	-	3	24	24	-
	1970	94	86	1	6	6	6	-
Mauritania	1986	81	54	-	27	15	13	4
	1970	98	69	26	-	2	1	-
Mauritius	1986	94	75	18	-	5	4	-
	1970	77	54	10	1	20	10	-
Mozambique	1983	51	31	13	7	49	12	..
	1970	65	65	-	-	35	35	-
Niger	1982	85	70	-	15	14	14	-
	1970	89	71	14	1	8	1	3
Nigeria	1981	90	34	51	2	11	3	-
	1970	97	96	1	-	3	1	-
Reunion	1987	93	89	-	3	7	7	-

Appendix Table 2 (concl.)

Country	Year[b]	Industrial Market Economies				Developing Countries		Socialist Countries
		Total	EEC	US[c]	Japan	Total	Africa	Total
	1970	82	29	52	-	18	18	-
Rwanda	1986	95	90	3	1	5	3	-
	1970	75	71	-	1	22	22	-
Senegal	1984	50	48	-	2	28	22	-
	1975	29	14	14	-	76	14	-
Seychelles	1984	16	5	7	3	85	11	-
	1970	95	64	14	17	3	2	3
Sierra L.	1984	65	56	9	-	6	2	-
	1970	30	29	1	-	67	3	3
Somalia	1985	11	10	-	-	89	4	-
	1970	49	34	4	9	22	6	29
Sudan	1983	34	25	2	5	47	5	18
	1970	60	39	11	6	34	10	5
Tanzania	1985	71	58	3	4	24	5	2
	1970	91	88	-	3	3	3	6
Togo	1984	66	63	1	1	22	13	12
	1970	77	35	24	11	15	4	8
Uganda	1983	89	53	31	5	8	3	-
	1970	76	74	2	-	24	24	-
Zaire	1982	98	83	3	1	3	2	-
	1970	87	58	-	23	7	1	6
Zambia	1984	68	32	10	24	22	5	10

Source: UNCTAD Handbook of International Trade and Development Statistics, 1987 and 1988, Table 3.4.

Notes:

a. Due to rounding up and data inconsistencies, the percentages do not always add up to a hundred.
b. 1970 or the nearest year and the latest year available for each country.
c. USA and Canada.

Appendix Table 3: Arithmetic Average of Actual Tariffs[a] on SSA Countries' Exports and that for All Developing Countries in Corresponding Products in the EEC, Japan and the US

percent

	EEC		JAPAN		US			EEC		JAPAN		US	
EXPORTER	for the exporter	for all developing	for the exporter	for all developing	for the exporter	for all developing	EXPORTER	for the exporter	for all developing	for the exporter	for all developing	for the exporter	for all developing
Angola	0.0	1.4	0.0	0.0	0.3	1.1	Mali*	0.0	1.8	1.1	2.5	3.3	5.2
Benin*	0.0	1.5	2.3	2.3	1.6	3.2	Mauritania*	0.0	3.2	4.6	5.0	8.4	9.8
Botswana	0.0	1.9	0.8	0.8	5.7	6.8	Mauritius	0.1	1.9	4.6	4.6	5.9	7.8
Burkina Faso*	0.2	1.6	0.8	2.4	8.3	9.1	Mozambique*	0.2	1.6	0.8	0.8	1.3	3.7
Burundi*	0.0	1.6	0.0	0.0	3.5	3.7	Namibia	..	..	..	..	2.9	2.5
Cameroon	0.0	1.5	0.4	0.4	4.7	6.0	Niger*	0.0	1.4	0.0	0.0	3.0	4.6
Cape Verde	0.0	2.1	..	..	0.0	0.0	Nigeria	0.0	1.3	1.4	1.5	5.3	4.5
C.A.R.*	0.0	1.9	0.0	0.0	2.4	4.2	Reunion	..	..	..	..	..	..
Chad*	0.0	1.2	0.0	0.0	31.3	31.3	Rwanda*	0.1	1.4	0.0	0.0	4.0	5.2
Comoros*	0.0	0.6	0.8	0.8	2.7	6.7	Sao Tome*	0.0	1.5	..	..	6.3	7.5
Congo	0.0	1.3	0.0	0.0	0.1	2.4	Senegal	0.1	2.3	2.5	2.6	4.1	5.7
Djibouti*	0.0	1.3	2.5	5.0	3.0	4.9	Seychelles	0.0	2.0	2.5	3.3	6.7	8.5
Ethiopia*	0.2	1.4	1.7	1.7	5.4	4.2	Sierra Leone*	0.0	2.9	3.0	3.0	4.9	5.7
Eq. Guinea*	0.0	1.1	..	..	19.8	19.8	Somalia*	0.0	2.2	0.0	0.0	7.4	8.4
Gabon	0.0	1.4	0.0	0.0	4.3	3.6	Sudan*	0.2	1.4	0.4	0.5	7.8	8.4
Gambia*	0.0	2.9	3.0	3.8	0.0	1.8	Swaziland	0.2	2.9	0.0	0.0	5.4	7.0
Ghana	0.0	1.9	0.6	0.6	2.3	3.9	Tanzania	0.1	1.3	0.8	0.9	1.2	1.9
Guinea*	0.0	1.7	5.0	6.3	2.1	3.3	Togo*	0.0	1.6	0.0	0.0	2.3	4.1
Guinea-B.*	0.0	2.9	2.5	4.1	0.3	3.8	Uganda*	0.3	1.5	0.0	0.0	5.4	5.8
Ivory Coast	0.1	2.3	1.1	1.1	4.2	6.4	Zaire	0.0	1.5	0.0	0.2	1.1	2.3
Kenya	0.0	2.2	1.3	1.4	3.8	6.3	Zambia	0.1	1.7	0.0	0.0	0.1	2.0
Lesotho*	0.1	2.1	0.0	5.6	11.6	12.2	Zimbabwe	0.1	1.7	1.1	1.2	7.0	7.8
Liberia	0.0	1.5	1.3	1.3	3.6	4.6							
Madagascar	0.0	1.4	0.9	0.9	2.2	2.6							
Malawi*	0.0	1.4	0.0	0.0	4.5	5.0							

Source: GATT Tariff Study computer files.

Notes:

a. Actual tariffs taking into account preferential rates.

*Least developed countries (LLDCs) according to the UN.

Appendix Table 4A: SSA's Products Affected by NTBs in the EEC by Product and Exporter

Product[a]	Exporter[b]	Value[c] (million US$)	NTB[d]
Meat, fresh, chilled or frozen	Botswana, Djibouti, Ivory Coast, Madagascar, Swaziland, Uganda	43.1	Variable levy, license, tariff quota, surveillance license
Fish, fresh, chilled or frozen	Cape Verde, Gabon, Ghana, Ivory Coast, Madagascar, Mauritania, Mauritius, Senegal, Seychelles	13.0	Reference prices
Shellfish, fresh, frozen salted, etc.	Benin, Cameroon, Eq. Guinea, Gabon, Gambia, Ghana, Guinea-Bissau, Ivory Coast, Kenya, Liberia, Madagascar, Mauritania, Mozambique, Senegal, Seychelles, Sierra Leone, Somalia, Tanzania, Togo	59.5	Reference prices, surveillance license
Cut flowers	Ethiopia, Ivory Coast, Kenya, Mauritius, Zimbabwe	15.3	Seasonal tariffs, community surveillance
Vegetables, fresh or chilled	Burkina-Faso, Cameroon, Ethiopia, Ivory Coast, Kenya, Mali, Mauritius, Niger, Nigeria, Senegal, Sudan, Togo, Zaire	31.3	Quotas n.e.s., reference prices, seasonal tariffs, seasonal quota, surveillance license
Vegetables, provisionally preserved	Kenya, Madagascar, Swaziland	0.1	License, quotas, surveillance license
Dried, dehydrated, etc. vegetables	Swaziland	0.2	Surveillance license
Dried leguminous vegetables	Kenya, Tanzania, Zimbabwe	4.2	License, surveillance license
Roots	Cameroon, Ivory Coast, Nigeria, Tanzania	1.0	Tariff quota, variable levy, license, quota by country
Dates, bananas, coconuts, etc., fresh or dried	Benin, Cameroon, Guinea, Ivory Coast, Madagascar, Togo	86.3	Quotas n.e.s.

Appendix Table 4A (cont.): EEC

Product[a]	Exporter[b]	Value[c] (million US$)	NTB[d]
Citrus fruits, fresh or dried	Burkina-Faso, Burundi, Cameroon, Ivory Coast, Kenya, Mozambique, Sierra Leone, Swaziland, Zaire, Zimbabwe	9.2	Seasonal tariffs, reference prices
Grapes, fresh or dried	Ivory Coast	0.1	Seasonal tariffs, reference prices
Other nuts, fresh or dried	Malawi	0.1	Reference prices
Berries, fresh	Ethiopia, Ivory Coast, Kenya, Zimbabwe	1.1	Seasonal tariffs, reference prices
Other fruit, fresh	Ethiopia, Ivory Coast, Kenya, Madagascar, Mauritius, Senegal, Zimbabwe	3.3	Reference prices, seasonal quota
Maize	Zambia	0.7	Variable levy, license
Rice	Togo	0.1	Variable levy, license
Buckwheat, millet, other cereals	Kenya, Malawi, Sudan	0.4	Variable levy, license
Cereal groats and cereal meal	Sudan	0.1	Variable levy, license
Seeds	Kenya, Madagascar, Tanzania, Zimbabwe	0.6	License, surveillance license
Other prepared, preserved meat	Botswana, Ethiopia, Kenya, Zimbabwe	21.6	Variable levy, license
Prepared, preserved fish	Cape Verde, Ivory Coast, Senegal	73.0	Quotas n.e.s, surveillance license, reference prices
Shellfish, prepared, preserved	Gambia, Ivory Coast, Senegal, Togo	0.4	Surveillance license, reference prices
Beet and cane sugar	Congo, Ivory Coast, Kenya, Madagascar, Malawi, Mauritius, Swaziland, Tanzania, Zimbabwe	271.0	License, variable levy

Appendix Table 4A (cont.): EEC

Product[a]	Exporter[b]	Value[c] (million US$)	NTB[d]
Molasses	Ethiopia, Ivory Coast, Kenya, Madagascar, Mauritius, Mozambique, Senegal, Somalia, Sudan, Tanzania	35.5	Variable levy, license
Sugar confectionery	Mauritius	0.1	Quotas n.e.s., variable component
Chocolate and other preparations containing cocoa	Ivory Coast	4.6	Variable component
Macaroni, spaghetti, etc.	Ivory Coast	0.1	Variable component, surveillance license
Tapioca and sago	Madagascar	0.3	Variable component
Vegetables, prepared, preserved	Cameroon, Ethiopia, Ivory Coast, Kenya, Madagascar	2.0	Quota by country, surveillance license, license
Jams, marmalades, etc.	Kenya, Malawi, Zimbabwe	0.5	Variable levy, license
Fruit otherwise prepared or preserved	Ivory Coast, Kenya, Lesotho, Swaziland, Uganda, Zimbabwe	28.5	Variable levy, license, surveillance license
Fruit juices	Ivory Coast, Kenya	1.4	Surveillance license, variable levy
Extracts, etc. of coffee, tea, mate	Ivory Coast, Tazania	0.8	Surveillance license
Food preparations, not elsewhere spec.	Ivory Coast, Nigeria, Senegal	0.3	Variable component, surveillance license
Wine	Comoros, Nigeria	0.1	License, reference prices
Spirits	Madagascar	0.1	Quotas n.e.s.
Residuals derived from cereals or leguminous vegetables	Benin, Cameroon, Gabon, Ivory Coast, Liberia, Nigeria, Togo, Uganda, Zaire	8.0	Variable levy, license
Residuals from sugar, starch, etc. manufacture	Liberia	0.1	License
Other vegetable products	Ghana, Guinea, Ivory Coast	0.9	License

Appendix Table 4A (cont.): EEC

Product[a]	Exporter[b]	Value[c] (million US$)	NTB[d]
Metallic ores	Mozambique, Zaire	0.1	Surveillance license
Petroleum oils and oils obtained from bituminous minerals, crude	Cameroon, Congo, Gabon, Nigeria	2,745.3	Quotas n.e.s.
Petroleum oils and oils obtained from bituminous minerals, other than crude	Angola, Cameroon, Gabon, Kenya, Nigeria, Sierra Leone, Tanzania	62.0	Quotas n.e.s., surveillance license
Petroleum gases	Angola, Nigeria	3.6	Quotas n.e.s.
Vaccines, toxins, etc.	Senegal	0.2	Surveillance license
Medicaments	Djibouti, Kenya, Nigeria	0.1	Surveillance license
Woven fabrics of man-made fibers	Togo	0.1	Quotas n.e.s.
Wool	Kenya	0.1	Surveillance license
Cotton, not carded or combed	Mali, Sudan, Tanzania	3.1	Surveillance license
Cotton yarn	Cameroon, Ivory Coast, Senegal, Sudan, Tanzania, Zimbabwe	7.3	Surveillance license
Terry towelling of cotton	Cameroon	1.4	Surveillance license
Other woven fabrics of cotton	Benin, Cameroon, Cent. Afr. Rep., Chad, Eq. Guinea, Ivory Coast, Liberia, Madagascar, Malawi, Rwanda, Senegal, Zambia, Zimbabwe	36.7	Quotas n.e.s., surveillance license
Yarn of man-made fibers	Mauritius	0.1	Surveillance license
Woven fabrics of man-made fibers	Ivory Coast, Mauritius, Togo, Zimbabwe	0.8	Surveillance license, quotas n.e.s.
Other vegetable textile fibers	Kenya, Tanzania	0.3	Surveillance license
Woven fabrics of jute	Kenya	0.1	Surveillance license, quotas n.e.s.

Appendix Table 4A (cont.): EEC

Product[a]	Exporter[b]	Value[c] (million US$)	NTB[d]
Twine, cordage, ropes, etc.	Kenya, Madagascar, Tanzania	0.5	Surveillance license
Gloves, mittens, etc.	Mauritius	1.4	Surveillance license, quotas n.e.s.
Under garments, knitted or crocheted	Djibouti, Ivory Coast, Mauritius, Senegal, Tanzania, Zimbabwe	3.3	Surveillance license, quotas n.e.s.
Outer garments, knitted or crocheted	Gambia, Ivory Coast, Lesotho, Malawi, Mauritius, Zimbabwe	24.9	Surveillance license, quotas n.e.s.
Men's and boys' outer garments	Burkina-Faso, Chad, Ivory Coast, Kenya, Lesotho, Mauritania, Mauritius, Niger, Zambia, Zimbabwe	7.4	Surveillance license, quotas n.e.s.
Women's, girls' and infants' outer garments	Cameroon, Congo, Ivory Coast, Kenya, Liberia, Malawi, Mali, Mauritius, Sudan, Zimbabwe	2.8	Surveillance license, quotas n.e.s.
Men's and boys' under garments	Liberia, Mauritania, Mauritius, Tanzania	6.5	Surveillance license, quotas n.e.s.
Women's, girls' and infants' under garments	Zimbabwe	0.2	Surveillance license, quotas n.e.s.
Bed linen, table linen, curtains, etc.	Cameroon	0.8	Surveillance license, quotas n.e.s.
Sacks and bags	Ethiopia, Ivory Coast, Mauritius	0.6	Surveillance license, quotas n.e.s
Footwear with rubber, etc. soles	Senegal	0.1	Community surveillance, surveillance license
Footwear with leather soles	Burkina-Faso, Congo, Ethiopia, Kenya, Liberia, Rwanda, Senegal, Zimbabwe	0.4	Community surveillance, surveillance license
Footwear with wood or cork soles	Djibouti	0.1	Community surveillance
Footwear with soles of other materials	Mauritius	0.1	Community surveillance

Appendix Table 4A (cont.): EEC

Product[a]	Exporter[b]	Value[c] (million US$)	NTB[d]
Parts of footwear	Burkina-Faso	0.1	Community surveillance
Precious and semi-precious stones	Botswana, Burundi, Cent. Afr. Rep., Congo, Gambia, Ghana, Guinea, Ivory Coast, Lesotho, Liberia, Madagascar, Mali, Mauritius, Nigeria, Sierra Leone, Tanzania, Togo, Zaire, Zambia	362.0	Surveillance license
Ferro-alloys	Zimbabwe	24.5	Surveillance license
Iron or steel coils	Zaire	0.1	Community surveillance, price surveillance
Bars and rods of iron or steel	Togo	0.1	Retrosp. surveillance
Angles, shapes, etc. of iron or steel	Zimbabwe	1.2	Retrosp. surveillance, community surveillance, price surveillance
Tubes and pipes of iron and steel	Congo, Ivory Coast	0.3	Surveillance license
Stranded wire, cables, etc. of iron or steel	Congo, Ivory Coast, Uganda	0.1	Surveillance license
Copper	Benin, Cameroon, Congo, Gabon, Ivory Coast, Kenya, Senegal, Zaire, Zambia, Zimbabwe	84.2	Surveillance license
Nickel	Tanzania, Zaire, Zambia, Zimbabwe	4.2	Surveillance license
Electrical goods	Chad, Liberia	0.1	Surveillance license
Sound equipment	Gabon	0.1	Surveillance license
Transmission and reception equipment	Cameroon, Congo, Gabon, Guinea, Ivory Coast, Madagascar, Mali, Niger, Senegal	0.4	Quotas n.e.s
Electrical apparatus	Benin	0.1	Surveillance license
Insulated electric wire, cable, etc.	Cameroon	0.1	Surveillance license

Appendix Table 4A (concl.): EEC

Product[a]	Exporter[b]	Value[c] (million US$)	NTB[d]
Motor vehicles	Cameroon, Cent. Afr. Rep., Congo, Niger, Nigeria, Togo	1.5	Surveillance license
Parts and accessories of motor vehicles	Angola, Cameroon, Congo, Djibouti, Gabon, Ivory Coast, Madagascar, Mali, Nigeria, Senegal, Zimbabwe	0.5	Surveillance license
Trucks and tractors	Ivory Coast	0.1	Surveillance license
Flying machines	Burkina-Faso, Gabon, Ivory Coast, Mali, Senegal	1.2	Surveillance license
Ships and boats	Benin, Ivory Coast, Liberia	13.4	Quotas n.e.s.
Photographic equipment	Zambia	0.1	Surveillance license
Medical instruments	Cameroon, Congo, Djibouti, Gabon, Ivory Coast	0.1	Surveillance license
Watches	Benin, Mauritius	0.5	Quotas n.e.s.
Watch movements	Mauritius	2.5	Quotas n.e.s.
Other clock and watch parts	Mauritius	0.1	Quotas n.e.s.

Source: UNCTAD Data Base on Trade Control Measures

Notes:
a. EEC import classification at the 4-digit aggregation level.
b. Exporters with US$ 10,000 or more in a single product within the aggregate product group.
c. Import values for 1984 in the aggregate product group from all SSA exporters.
d. NTBs covering one or more products/exporters concerning the aggregate product group.

Appendix Table 4B: SSA's Products Affected by NTBs in Japan by Product and Exporter

Product[a]	Exporter	Value[b] (million US$)	NTB[c]
Live animals, n.e.s.	Botswana, Ethiopia, Ghana, Kenya, Liberia, Senegal, Seychelles, Zimbabwe, Togo, Tanzania	0.5	Global quota (unallocated), import authorization
Aquarium fish	C.A.R., Kenya	0.1	Import authorization
Aji, frozen (excluding fillets)	Mauritania, Senegal	0.1	Global quota (unallocated), import authorization
Other fresh, chilled or frozen fish (excluding fillets)	Djibouti, Ghana, Gambia, Mauritania, Mauritius, Namibia, Senegal, Seychelles, Sierra Leone	22.0	Import authorization
Fish, salted or dried, n.e.s.	Reunion, Senegal, Seychelles	0.1	Global quota (unallocated), import authorization
Shrimps, prawns and lobster, fresh, chilled or frozen	Guinea, Madagascar, Mozambique, Nigeria, Senegal, Tanzania	44.5	Import authorization
Cuttle fish and squid, fresh, chilled or frozen	Ghana, Mauritania, Nigeria, Senegal	21.2	Global quota (unallocated), import authorization
Octopus, fresh, chilled or frozen	Guinea Bissau, Mauritania	41.8	Import authorization
Bekko	Kenya, Seychelles, Somalia, Tanzania	0.2	Global quota (unallocated), import authorization
Shells	Comoros, Kenya, Tanzania	0.1	Import authorization
Other live plants	Ivory Coast, Liberia, Madagascar	0.1	License

Appendix Table 4B (concl.) : Japan

Product[a]	Exporter	Value[b] (million US$)	NTB[c]
Dried vegetables, n.e.s.	Zimbabwe	0.1	Global quota (unallocated)
Maize	Zimbabwe	0.4	Tariff quota
Seaweeds	Madagascar	0.1	Import authorization
Fish liver oil	Ivory Coast, Senegal	0.2	Import authorization
Bacon	Ethiopia	0.1	Import authorization
Flours and meal, not for human consumption	Ethiopia	0.3	Import authorization
Tobacco	Malawi, Zimbabwe	12.5	Sole importing agency
Manganese	Congo, Gabon, Ghana	8.8	Tariff quota
Chromium, niobium and tantalum	Madagascar, Nigeria, Rwanda, Zaire	5.5	Global quota (unallocated)
Leather, tanned	Tanzania	0.1	Tariff quota, global quota (unallocated)
Textile fabrics, fibers, cordage and ropes	Burkina Faso, Kenya, Tanzania	2.0	Import authorization
Worked ivory, etc.	Congo, Kenya, Sudan	0.1	Global quota (unallocated)
Collections, zoological, botanical, anatomical, etc.[d]	Kenya	5.9	Global quota (unallocated)

Source: UNCTAD Data Base on Trade Control Measures.

Notes:

a. According to Japan's tariff classification. Some related items are aggregated for the presentation.
b. Total import values for 1984.
c. NTBs in 1986.
d. In more recent years extremely low trade due to prohibition.

Appendix Table 4C: SSA's Products Affected by NTBs in the US by Product and Exporter

Product[a]	Exporter	Value[b] (million US$)	NTB[c]
Sugars, syrups and molasses	Congo, Madagascar, Malawi, Mauritius, Mozambique, Swaziland, Zimbabwe	82.0	Bilateral quotas, flexible import fees
Edible preparations, n.e.s.	Burkina Faso, Ivory Coast, Kenya, Mali, Swaziland	0.2	Global quota (allocated)
Fresh cut carnations	Kenya	0.2	Anti-dumping investigations
Fresh cut flowers, n.e.s.	Kenya	0.1	Anti-dumping investigations and anti-dumping duties
Raw cotton (short and long staple)	Sudan	0.2	Bilateral quotas
Textiles and clothing[d]	Mauritius	59.9[e]	MFA quotas
Wire rods of iron and steel	Zimbabwe	0.4	Countervailing duty investigations and countervailing duties

Source: UNCTAD Data Base on Trade Control Measures.

Notes:

a. According to the US tariff classification. Some related items are aggregated for the presentation.
b. Total import values for 1984.
c. NTBs in 1986.
d. All textile and clothing items subject to MFA.
e. 1986 MFA import value.

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