

From Made in the World to Made in Africa?

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Abstract

'Radical uncertainty' about the future of the World Trading System is pushing countries to deglobalize to reduce their exposition to potentially more risky production networks and to turn towards supply chains with geopolitically closer partners. This paper uses multi-regional input-output measures over 1995-2022 to evaluate Africa's participation in supply chain trade. Africa's position in global value chains has remained largely unchanged over the period. In 2022, the continent's backward participation (import content of exports) was about 14%, compared with 20% at the world level. Its forward participation rose to 25%, indicating that exports continue to be processed abroad before reaching the final consumer. This pattern confirms that Africa remains concentrated at the start of supply chains.

A successful AfCFTA could contribute towards a 'made in Africa'. Progress is uneven. Tariff liberalization commitments is advancing. Rules of origin remain complex and fragmented. Both limit the emergence of regional production networks. Africa has yet to build the conditions for reshoring within the continent. While some efforts are made on the tariff front, notably, negotiators' commitments to adopt simple rules of origin, both necessary to direct supply production networks towards African countries, lack ambition.

Note: I used ChatGPT-5.1. for the information in figure 3. Ideas and arguments are entirely my own, and I take full responsibility for them.

Table of Contents

1. Progress at African regional integration through the Press	2
2. Supply chains: the two sides of the death of distance.....	3
2.1 Measuring supply chain activity.....	4
2.2 Africa is at the start of supply chains	4
2.3. Reshoring is occurring, but not in Africa.....	6
3. Drivers of intra-African trade	6
3.1 Continental trade across RECs is stubbornly low.....	7
3.2 Ethnic, cultural, and linguistic diversity affect continental trade	8
3.3. tariff barriers within and across RECs are still high.....	10
4. Progress on monitorable AcFTA negotiations	11
4.1 Substantial tariff elimination among members is making progress.....	11
4.2 ...but slow progress on harmonization towards user-friendly Product-Specific Rules of Origin (PSRO).....	14
5. Conclusions	16
References.....	17
Appendix	20
A1. Constructing Regions and assigning countries to regions and mutually exclusive RECs	20

“In conclusion, randomized evaluations represent a major step forward in our ability to assess development programs, but they should be used with care and in combination with other approaches. Their greatest contribution may lie in fostering a culture of rigorous evaluation and continuous learning in development practice.”

Elisabeth Sadoulet (2005, pp. 249-250)

1. Progress at African regional integration through the Press

Economists have closely dissected progress at African regional integration for the last 50 years with periods of hope following periods of despair as reflected in **The Economist's** title covers below. Since 2000, Africa made the front cover of **The Economist**: *Hopeless continent* (2000)—dismal policies; *Africa rising* (2011) and *Aspiring Africa* (2013)—policy reforms with some improvements in performance; *New scramble for Africa* (2016)—the rush towards minerals. Early narratives around *hopeless Africa* were inspired by country studies of East Asian countries concluding that openness to the world was key to success. The *Aspiring Africa* and *Africa Rising* narratives followed temporary improvements in performance, a narrative that was then amended to recognize that markets needed to be amended rather than replaced (Stiglitz (1996) on the ‘Asian miracle’). Then, when cross-country growth regressions reigned supreme, institutions were found to trump openness to trade and geography in the growth contest (though geography was found to have an indirect effect on growth via institutions).

In 2026, a decade later, we could now propose a front cover *From Made in the World to Made in Africa*—this paper's title-- as part of a ‘requiem for hyper globalization’ (Patel et al. 2024). Two reasons come to mind. First, Africa's has had limited participation in the growth of outsourcing in supply chains boosted by the birth of Information and Communication Technologies (ICT). For African countries, this ‘death of distance’ was with partners outside the continent at the start of the chain with African exports undergoing further transformation in importing countries. As documented in this paper, African imports of intermediate goods necessary to produce a complete product before entering a new line of business were less than in other regions over 1995-2022. In short, the African continent is the region that has failed to start developing Regional Value Chains (RVCs). Second, wars and geopolitical conflicts are shortening the length of supply chains accelerating reshoring/friendshoring (Miroudot and Nordstrom (2020) estimate that between 2012 and 2016, the average length of supply chains shrunk by 50 km per year).

The spread of randomized control trials (RCTs) gave new hope in titles like “Can the West Save Africa?” (Easterly 2009). The above extract from Betty Sadoulet's comments on Esther Duflo's invited paper at the AFD's 2004 annual conference--at a time when Randomized Control Trials (RCTs) were taking off-- foresaw and summarized much of the subsequent discussion on the value of Impact Evaluation (IE) *stricto sensu* from other forms of evaluation: continuous learning from rigorous methods to be combined with other methods.

When evaluating progress at regional integration in Africa, quasi experimental methods have been successful at complementing randomization methods, for example at evaluating drivers of trade costs (like improved customs procedures, reduced corruption, or better information)¹ As recognized by Betty and by Rodrik (2008), we face the inescapable trade-off between ‘internal validity’ (the ability to identify impact effects net of confounding influences), which improves as one goes from cross-country studies to impact evaluations, and ‘external validity’ (the ability to draw general policy propositions from evaluation results), which may well worsen when evaluation relies exclusively on quasi-experimental methods, let alone RCTs.

I review here the contention that a successful AfCFTA could contribute to a shift away from the past growth of supply chains with countries outside the continent towards ‘made in Africa’ by re-orienting production networks towards African partners. What are the prospects for this shift? This paper uses comparable measures of supply chain trade (i.e. trade in intermediate products) across regions over the past 30 years to measure progress. Measures of progress and remaining policy restrictions on international trade indicate that Africa has a long way to go, notably in comparison with Asia.

Section 2 recalls the two faces of the death of distance: making both offshoring and reshoring more attractive which is ambiguous for supply chain trade. It documents that supply chain trade in Africa has developed with countries outside the continent, not within Africa. Section 3 highlights three dimensions along which African goods trade is low: Unhospitable geography, Ethnic and linguistic Fragmentation, and relatively high tariffs between Regional Economic Communities (RECs). Section 4 takes stock at progress on AfCFTA negotiations. These are promising on tariffs, but slow on harmonization of Rules of origin. Section 5 concludes.

2. Supply chains: the two sides of the death of distance.

Supply chains took off in the 1980s when trade costs fell through several channels. Transport costs fell (containerization of trade); trade barriers were reduced through unilateral, regional and multilateral negotiations; and the advent of Information and Communication Technologies (ICT) eased the fragmentation of production. On one side, this ‘death of distance’ from increased ease of communication transformed the competitive landscape for a handful of countries in East Asia and Central Europe. They joined and contributed to the development of ‘factory Asia’ which followed in the footsteps of ‘factory Europe’. Globalization was on its way. So, the death of distance helped the delocalization of production, and to what Baldwin

¹ While no randomized controlled trials evaluate regional integration agreements directly, causal evidence from quasi-experimental studies shows that reductions in trade costs—through improved customs procedures, reduced corruption, and better information—have large effects on trade flows (Sequeira and Djankov 2014; Volpe Martincus et al. 2015; Allen 2014). Complementary experimental evidence at the firm level confirms that access to export markets improves firm performance (Atkin et al. 2017), while Cadot et al (2014) review methods used to evaluate aid for trade and trade policies. Melo et al. (2025) estimate reductions in trade costs resulting from improvements in customs procedures.

(2016) calls tele migration, as workers in the global South carried out activities along supply chain networks with headquarters in the North.

On the other side, the arrival of 'Industry 4.0' (growth of artificial intelligence, automation and robotics, machine learning and big data analytics, the Internet of Things (IoT), and 3D printing) was a first incentive to reshore. A second was the financial crisis of 2008-09 that increased trade uncertainty. Discriminatory trade measures, mostly against LDCs, grew.² Geopolitical tensions were already pressuring countries to 'reshore' by retreating from engagement in global production networks. A third was the added incentive coming from the increasing uncertainty following from ongoing wars and the growing geopolitical tensions.

2.1 Measuring supply chain activity

A supply chain flow is defined as trade that crosses at least two borders before reaching the consumer. Multi-Region Input-Output (MRIO) data allows consistent measurement of supply chain trade across countries and sectors.

Two component indicators summarize participation. The backward component is the share of imported inputs embodied in exports (table 1, col. 1). The forward component is the share of exports that are further processed abroad before final consumption (col. 2).

These measures capture both gains and vulnerabilities. High backward and forward shares indicate integration into production networks. They are associated with technology transfer, learning, and scale effects. At the same time, they imply exposure to shocks. High backward shares increase vulnerability to supply disruptions. High forward shares increase exposure to demand shocks.

Countries with high import content in exports are also more exposed to trade policy shocks. By contrast, exporters of primary products—typical in Africa—face lower risk of input taxation, because importers of African exports have no incentive to tax inputs with low substitution possibilities.

2.2 Africa is at the start of supply chains

Without supply chain linkages, countries must produce complete goods before entering new activities. Supply chains relax this constraint. They allow specialization in stages of production and facilitate upgrading.

At the global level, intermediate goods accounted for about 41% of exports in 1995. This share rose to about 50% in 2022 (table 1). Over the same period, the global share of GVC trade increased by roughly 22%.

² A tally of trade measures applied by countries shows that discriminatory measures have been growing more rapidly than liberalizing measures since the crisis and that these measures have impacted trade. See <https://www.globaltradealert.org/> for an up to date count of trade measures and the [Trade Policy Activity](#) (TPA) index developed at the IMF and WTO.

Drawing on a taxonomy of GSCs classifying manufacturing on a ladder from concentration on commodities to concentration on innovation activities, the World Bank's World Development Report (WDR 2020) shows that GDP per capita grows more rapidly when countries move away from commodities into limited manufacturing GVCs or beyond to innovative activities. Thus, participation in GVCs is also apparently associated with higher growth. Supply networks in China and India--two countries that a successful AfCFTA could aspire to emulate at the continental level--have grown at both ends of the chains.

Africa's pattern differs. Participation remains concentrated at the start of supply chains. Forward shares are high, while backward shares are low. In 2022, Africa's backward share was about 14%, compared with 20% for the world. Its forward share reached 25%. This pattern limits gains from integration. Exposure to imported inputs—often associated with learning and upgrading—is low. Exports are processed further abroad, reducing domestic value added in downstream activities.

Table 1: Anatomy of GVC trade by region: 1995 and 2022

	Year	Backward. share	Forward. share	Mixed share	Total GVC Share
Column		1	2	3	4=1+2+3
World Exc.	1995	.18	.18	.06	.41
Oceania	2022	.20	.22	.09	.50
Africa (50)	1995	.15	.21	.05	.42
	2022	.14	.25	.04	.47
Asia (47)	1995	.16	.17	.04	.37
	2022	.15	.22	.06	.46
LAC (30)	1995	.15	.14	.03	.32
	2022	.17	.18	.06	.42
NAFTA (3)	1995	.22	.12	.03	.37
	2022	.25	.14	.05	.44
Eur. & Central.	1995	.22	.19	.09	.49
Asia (43)	2022	.28	.19	.15	.63
China	1995	.09	.16	.02	.27
	2022	.18	.24	.04	.36
India	1995	.19	.19	.02	.30
	2022	.21	.21	.07	.46

Notes: Simple averages. Number of countries in each region in parentheses in column 1.

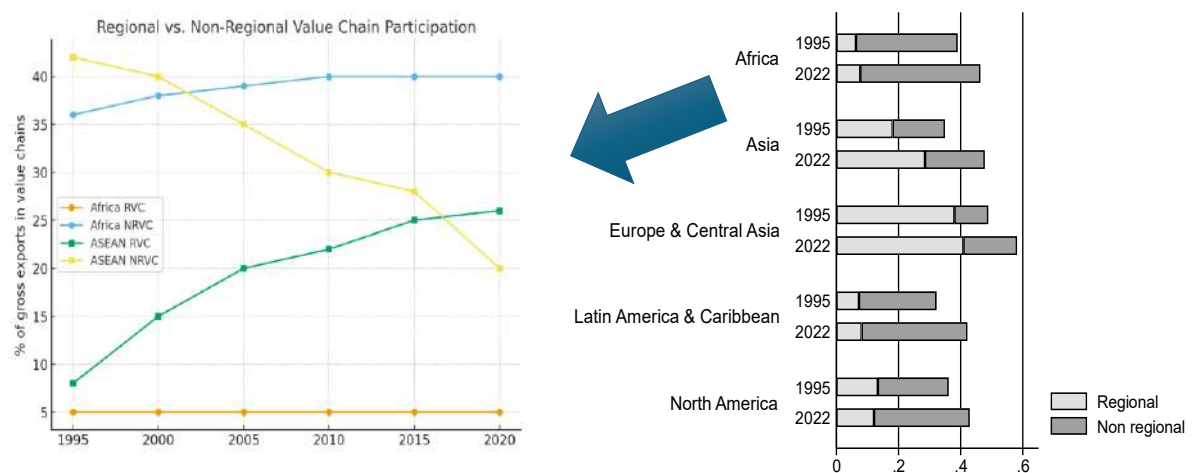
LAC excludes Mexico and Asia excludes China and India. GVC exports are defined as exports that cross at least two borders. The GVC share (col.4=col.1+col.2+col.3) is the share of value added trade in gross exports. This is the sum of the share of imports in gross exports (pure backward share in col. 1), exports that undergo further processing in the importing country before final destination (pure forward share in col. 2) and mixed (col. 3) which captures all the imported inputs in a country's exports that are re-exported by the bilateral partner. Africa includes all members of AfCFTA.

Source: Melo and Solleder (2025, table 1). Calculations for 188 countries from EORA 26 sector data.

2.3. Reshoring is occurring, but not in Africa.

Africa stands out both as the region with the largest forward share, and the region with the smallest backward share. This means African exports undergo further processing in importing countries and African exports embody few imports. Europe's export basket has the highest import content, but imports are overwhelmingly sourced within the region (figure 1). By this metric, in our times of 'radical uncertainty', Europe's supply chains are relatively safe (at least relative to North America) to disruptions in supply chains outside the region whereas African exports are exposed to shocks in their export markets.

Figure 1: Comparing supply chains: Asia ("Made in Asia") and Africa "Made elsewhere"



Notes: Decomposition of GVC trade: Regional Value Chains (RVCs) vs. Non-Regional Value Chains (NRVCs): 1995 and 2022) RVC + NRVC = GVC. The GVC share in figure 1 adds up to the total GVC trade share in table 1, col. 4). Source: Melo and Solleder (2025, table 4)

Evidence also suggests that reshoring is strengthening regional production networks elsewhere, especially in Asia. There is little indication of a similar trend within Africa. Regional value chains have not expanded in response to recent shocks.

This asymmetry underscores the central challenge. The global shift towards shorter supply chains creates an opportunity. Africa has yet to capture it.

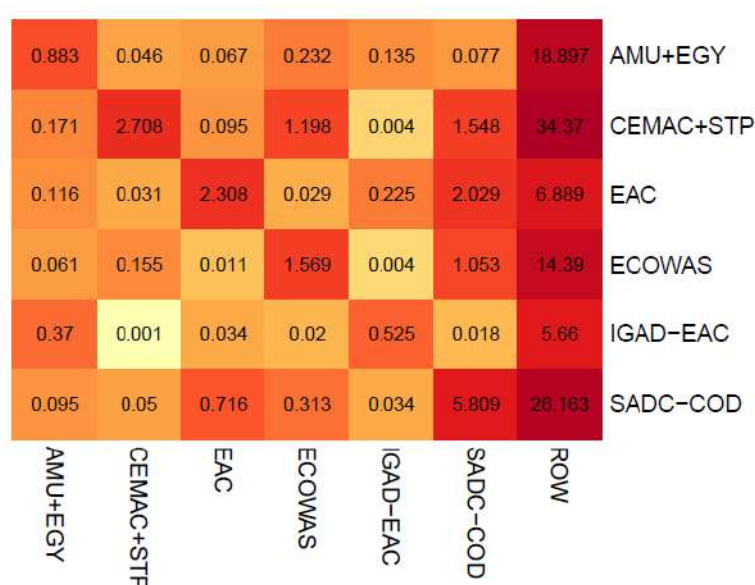
3. Drivers of intra-African trade

Low intra-African trade reflects both structural and policy factors. Geography is unfavorable. Borders are artificial. Ethnic and linguistic fragmentation is high. Policy barriers remain significant. Together, these factors limit intra-industry trade across Regional Economic Communities (RECs).

3.1 Continental trade across RECs is stubbornly low

Trade within RECs is about twice trade between RECs. Along the Lagos-planned path, removal of barriers to trade along the RECs were to stimulate intra-African trade, especially across REC members. The ratio of within-REC trade to between-REC trade grew from 1.2 times in 1960 to 2.75 times in 1990, but since then, within-RECs trade has fallen. During 2010-2022, on average, within-REC trade never exceeded 6% while trade across RECs is insignificant.³ In 2022, within-REC trade in Africa was only twice between-REC trade.

Figure 2: Heatmap of REC exports: Intra-and between as percentage of origin REC GDP (Average 2010-2022)



Notes: RECs are defined to exclude multiple membership. See the acronyms-abbreviations file for classification of countries in each constructed non-overlapping REC membership.

EAC countries export on average 2.3% of GDP to other EAC members and 6.8% to Rest-of-the-world (ROW).

Source: Krantz and D. Beltekian (2025, figure 4). See definition of non-overlapping RECs in table A3

The heatmap in figure 2 shows that inter-RECs trade share of GDP rarely exceeds 1% of GDP while it exceeds 10% when it is trade with the rest-of-the-world. Intra-REC trade only exceeds 5% of GDP for SADC. Inhospitable geography, artificial borders, ethnic fragmentation, and high

³ The definition of RECs in figure 2 is slightly modified from the official definition to eliminate country participation in multiple RECs. See Krantz and Beltekian (2025). The RECs were largely drawn from colonial heritage, rather than along geographical, ethnic, or linguistic lines. Melo and Tsikata (2015) report that 54 African countries were involved in 55 PTAs, among which 31 are cross-regional, an important observation in view of the insignificant cross-region trade in figure 2. Note that Mold (2024) warns that neglecting informal cross-border trade leads to an under-estimate of exports to African partners as high as 38-42 percent for non-oil resource intensive and landlocked countries.

transport costs overland, all contribute to this insignificant trade across African regions, especially across an East-West or North-South divide.

3.2 Ethnic, cultural, and linguistic diversity affect continental trade

Africa's fragmented geographical environment (Africa is the continent with the largest share of artificial borders, Alesina et al. (2011)) raises trade costs between ethnicities that are fragmented across these borders. Other drivers of low intra African trade include conflicts across ethnic groups and conflicts over natural resources unevenly distributed across countries. The gains from trade are also concentrated in the hands of elites with negative impacts on institutions and democracy.⁴

Figure 3 contrasts intra-regional trade across the three largest Regional Trade Agreements (RTAs) in terms membership (membership in parenthesis) [AfCFTA (54); ASEAN (10); EU(28)] considering ethnic and linguistic fragmentation. The pattern is clear: Intra-regional trade is lowest in Africa ($\approx 10\text{--}15\%$), intermediate in ASEAN ($\approx 20\text{--}25\%$), and highest in the European Union ($\approx 60\text{--}70\%$). This pattern is consistent with evidence from the literature on language-family diversity and extent of cross-border ethnicity summarized below.

Consistent with the differences in intra-regional trade intensities and Africa's fragmented geographical environment, the number of dialects and shares of cross-border ethnic groups are largest for AfCFTA, least for EU. Michalopoulos and Papaioannou (2016) observe that of 835 ethnicities, 28% have at least 10% of their homeland in more than one country.

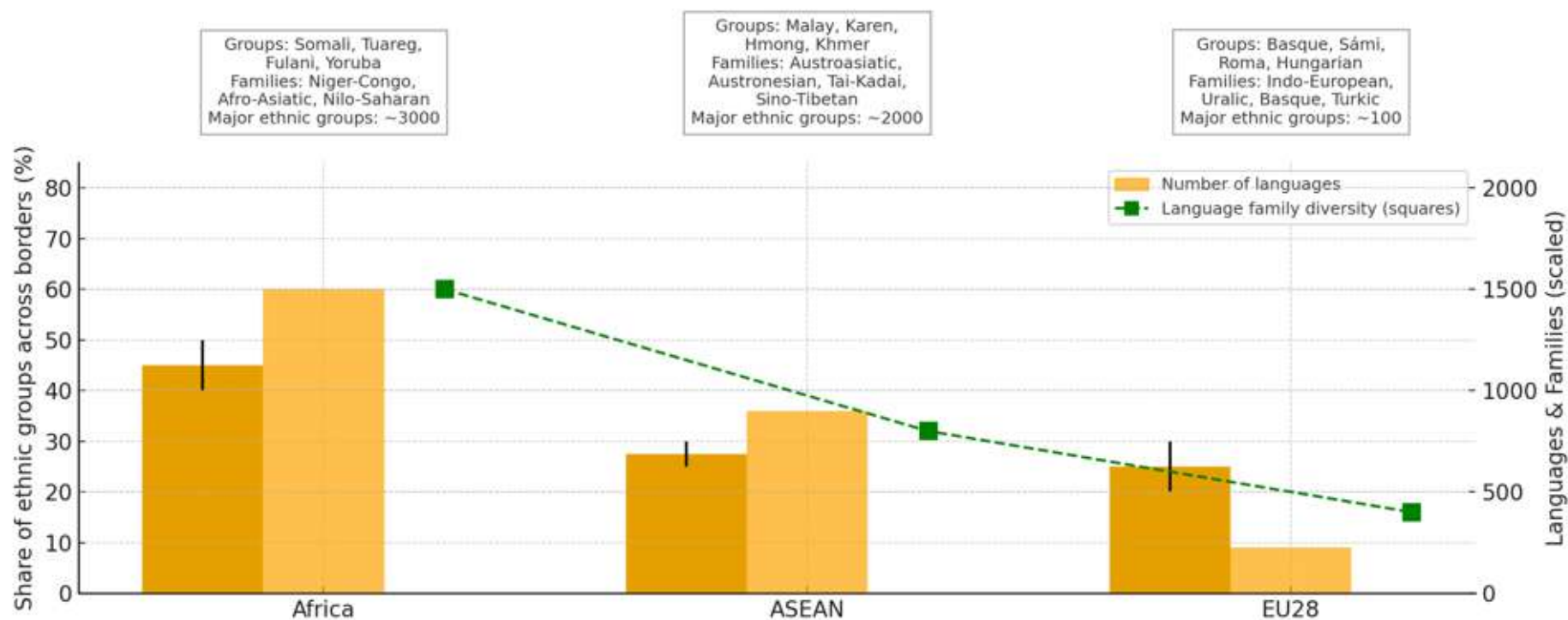
On the one hand, they estimate that conflict intensity is 40% higher, the conflict duration 50%-60% higher and the likelihood of conflict 8% higher in the homelands of partitioned groups.

On the other hand, cultural proximity is an enhancer of trade. In gravity estimates of bilateral trade for the EU, Felbelmayr and Toubal (2010) estimate that cultural proximity as proxied from time-varying Eurovision voting patterns has an effect on bilateral trade of comparable magnitude, though smaller, than distance. These results suggest that cultural proximity-- as captured from Eurovision voting patterns—affects bilateral trade by lowering transaction costs (better information flows), fomenting greater trust and, on the demand side, greater preference similarity.⁵

⁴ Using nighttime satellite imagery, Buhler (2024) shows that the gains from trade are concentrated in ethnic groups and, conditional on a large set of fixed effects, he estimates that a 10% increase in exports decreases household wealth by 10% of a standard deviation for those not in power, but increases wealth by 4.6% of a standard deviation for ethnic groups in power. He attributes this result to a relocation of manufacturing into the homelands of homeland elites. He conjectures that this concentration of the gains from trade in the hands of elites to the negative impacts of trade on institutions and democracy shown in the Afrobarometer surveys.

⁵ Gurevitch et al. (2020) also establish the importance of linguistic proximity for bilateral trade in Canada Drawing on Quebec's 101 bill that made French an official language in Canada, Gurevitch et al. (2020) estimate that linguistic proximity accounts for about 10 percent of the estimated 'home bias', establishing that linguistic proximity is an influential determinant of bilateral trade, both internationally and domestically.

Figure 3: Stylized representation of Ethnic and linguistic Fragmentation across three large-membership Regional Integration Arrangements



Notes: Number of countries in parenthesis and intra-region trade in brackets: ACFTA (54), [~10-15%]; ASEAN (10), [~20-25%] EU (28), [~60-75%]

Yellow bars: Number of languages/dialects EU (~300); ASEAN (~800); Africa (~1500)

Orange bars: Share of cross-border ethnic groups [EU (0.25); ASEAN (0.45); Africa (0.85)] (ranges shown as error bars)

Squares: Language diversity For Africa from Michalopoulos and Papaioannou (2016) [EU (0.25); ASEAN (0.45); Africa (0.85)]. EU has low diversity (mostly indo-european and Africa multiple major families)

Source: chatgpt 5.0 from author query to give number of languages, ethnicities and family diversity in each RTA

Interstate conflict intensity over resources is a brake on intra-regional trade. Conflict is also exacerbated when at least one country has natural resources and, when both countries have resources, when resources are located asymmetrically vis-à-vis the border. Caselli et al. (2014) give support for this prediction for oil fields in Africa. Conflict is more likely when at least one country has natural resources, when the resources in the resource-endowed country are closer to the border, and, in the case where both countries have natural resources, when the resources are located asymmetrically vis-à-vis the border.

Cross-border ethnic partitioning has two opposing effects. It may facilitate trade through trust and network effects while simultaneously increasing conflict and coordination costs. The net effect is therefore ambiguous. A gravity specification incorporating ethnic overlap and fragmentation would predict a positive effect of ethnic overlap and a negative effect of fragmentation. Estimating such a specification is beyond the scope of this paper.⁶

3.3. tariff barriers within and across RECs are still high...

Reduction in trade barriers under AfCFTA should help boost reshoring. Yet, RECs are still central for implementing AfCFTA as most negotiations like those on tariffs and on the harmonization of Rules of Origin (RoO), take place at the REC level.

Eliminating tariffs on intra-African is centerpiece of AfCFTA phase I, at least one that is easily monitorable. Estimates by Feodora Teti show large data gaps but a clear pattern. Preferential tariffs are incomplete and unevenly implemented. For many LDCs, reported preferential rates cover less than half of the years in which agreements are in force. Table 2 contrasts the average applied tariffs within RECs with the corresponding average MFN tariffs. For all regions except SACU, MFN tariffs are above 10%, often close to 15%. Except for CU or FTA members where intra-group tariffs are low, for trade flows between countries in different trading groups, applied tariffs are close to the prevailing MFN tariffs. In short, Teti's painstakingly estimated applied tariffs show that there is ample room for AfCFTA to reduce/eliminate tariffs on intra-African trade across regions.⁷

⁶ EthnicOne could

⁷ Teti (2024) reports that applied tariffs are missing for over 50% of observations for LDCs in the WITS data base. And for LDCs, concentrated in Africa, the number of years in which preferential tariffs are reported is less than half of the number of years of the respective preferential scheme is in force. See her description of steps taken to construct the applied bilateral tariffs in table 2.

Table 2: Average bilateral Tariffs (in %) across African regions and individual trading partners (2017)

Export Import		South		East		Central		West	North	EU	USA	China	MFN
		SACU	Non-SACU	EAC	Non-EAC	CEMAC	Non-CEMAC	ECOWAS					
South	SACU	0	1	6	8	8	4	8	8	3	8	8	8
	Non-SACU	2	2	3	4	10	6	10	8	7	10	10	10
East	EAC	6	1	0	3	13	8	13	10	13	13	13	13
	Non-EAC	15	8	7	10	16	14	16	13	16	16	16	16
Central	CEMAC	17	17	17	17	1	17	17	17	17	17	17	17
	Non-CEMAC	10	10	10	10	10	10	10	10	10	10	10	10
West	ECOWAS	12	12	12	12	12	12	4	12	11	12	12	12
North		13	9	9	6	13	13	13	2	8	12	13	13
EU		0	0	0	0	1	0	0	1	0	5	5	5
USA		1	1	1	1	1	1	1	2	4	–	4	4
China		9	5	4	1	6	6	5	9	11	11	–	11
		Customs Union				FTA between all countries				FTA between selected countries			

Note: The figure shows bilateral (unweighted) average tariffs between African regions and with individual selected trading partners. Tariff data describe the year 2017, trade agreements include all those notified to the WTO (as of date: September 9, 2021).

Notes:

Blue is reserved for the four customs unions: SACU, EAC, CEMAC, ECOWAS. Dark red cells indicate that an FTA exists between all countries in the respective two regions (e.g. the SADC FTA exists between all SACU and non-SACU countries in the South. Light red cells indicate that an FTA exists between at least one pair of countries in two different regions. In the East, EAC has an average MFN tariff of 13% and 0% tariff for within member trade, but close to MFN rates for trade with countries in the West other regions. In the West, ECOWAS has an average applied MFN of 12% as well as for trade with countries in other African regions, 4% average applied tariff for trade within members

Source: Böschmeier, et al. table 1 from data in Teti (2024). See table A3 for definition of Regional Agreements.

4. Progress on monitorable AcFTA negotiations

Among the more easily monitorable objectives, negotiators face two implementation challenges. First, on exclusions in reducing tariffs, second on Rules of Origin (RoO) that must be harmonized across RECs. Below, I review the State of (still ongoing as of early 2026) negotiations on both. Progress on tariff reductions is encouraging. Not so for harmonization on rules of origin.

4.1 Substantial tariff elimination among members is making progress....

Table A3 details the criteria to be met by Tariff Lines (TLs) in the submissions by State Parties (SPs). Boysen (2024) has painstakingly checked compliance with the criteria in table A3 as no submission was fully compliant. (Some were incomplete (missing tariff lines and/or missing lists for categories B and C) and some failed on some criteria.) This reconciliation allowed him to construct a liberalization Stance (i.e LS index) for each offer. LS measures how much the negotiators are offering (Toff) that is compatible with the imposed minima vs. what they would offer if their objective is to maximize revenue (Trmax), which could be the objective of negotiators told or to make it simple, established rules (rules SP is offering, Toff, relative to

the minimum offer that would maximize tariff revenue, Tr_{max} , while meeting the criteria in table 3. The LS index is calculated as:

$$LS = 1 - (Toff/Tr_{max})$$

A high LS value corresponds to an offer close to zero tariffs compared to a tariff offer that would maximize tariff revenue. A low LS value corresponds to a minimal offer (i.e. $Toff$ close to Tr_{max}). Note, however, that a high LS value obtains for countries with low applied tariffs. This is the case of Mauritius (MRU) and Zambia (ZMB) since they already have low MFN applied rates. Among the 4 offers submitted by CUs, COMESA and EAC were deemed receivable.

Table 3 displays the state of play in 2024--6 years into implementation of AFCFTA—as provided by Boysen's 'repaired' list in table 3, column 3 (see notes to table 4 and table A5). Boysen, then uses this repaired list to compute the Liberalization Stance (LS) reported in column 6.⁸ The details on the repair list and the estimation of LS are necessary estimate what is likely to transpire from the negotiations and the likely implications for government revenues.

Table 3: Estimated Trade liberalization stance in constructed AcFTA offers

Importer	Tariff share in tax revenue (AU share in tariff revenue)	Average Import Tariffs (%) from repaired offers. (see table A5)			Liberalization Stance (LS)
		Pre-AfCFTA	Offer toff	Maximum Revenue trmax	$LS = 1 - (toff/tr_{max})$
Column 1	2	3	4	5	$6 = 1 - (4/5)$
(7) CEMAC	12.9(1.3)	11.1	1.8	2.4	0.6
(6) EAC	8.1(0.5)	5.9	2.6	2.6	0.0
(15) ECOWAS	14.8(0.7)	9.7	2.2	2.1	0.0*
(5) SACU	6.4(0.3)	0.4	0.3	0.4	0.8
COD	11.2(5.1)	10.9	1.8	2.0	0.1
DZA	--(--)	8.3	0.6	3.0	0.8
EGY	6.4(0.0)	1.4	0.2	0.6	0.8
MAR	3.9(0.3)	1.3	0.2	0.7	0.7
MDG	16.0(1.3)	4.3	1.0	1.6	0.3
MUS	1.4(0.1)	0.1	0.1	0.1	1.0
SYC	4.3(0.2)	2.0	1.9	2.0	0.1
TUN	4.6(0.1)	1.0	0.3	0.9	0.7
ZMB	7.0(0.1)	0.1	0.0	0.1	0.0

⁸ Boysen maximizes tariff revenue for each SP over unassigned TLs (i.e. those TLs with zero tariffs at the start of the negotiations --above 5000 TLs for Mauritius and Seychelles, but around 1000 or less for most other SPs—taking into account the constraints imposed by categories A, B, and C in table A3 and the excluded C category in table.

Notes. Only 8 regions use 2017 HS-6 revision. An asterisk (*) in column 1 indicates that TLs for cat. B and C were not submitted. These are signaled as (-) in cols. 3 and 4.

REPAIR: Missing TLs in column 1 (e.g. 656 for EAC) with zero tariffs or zero imports were assigned to category A but can be assigned to categories B or C so long as modalities in table A3 are respected. TLs with zero imports and >0 tariffs are put in category C (presumably these TLs are perceived as important in case of an import surge by other SPs). See details in annex tables A3 and A4.

REPAIRED ESTIMATES (cols 5-8). All average tariff estimates in columns 5,6,7 are import-weighted.

Tariffs from MACMap 2019 data. Trade data from Baci (CEPII).

Col. 1: number of members in CUs in parenthesis.

Col. 2: Tariff share in government revenue; share of AfCFTA tariffs in total tariff revenue in parenthesis. Boysen (tables S3 and S4)

Col. 3: Estimated pre-AfCFTA trade weighted tariff from repaired offers—See table A4.

Col. 4: Repaired tariff offer (see table A4)

Col.5 : Tariff-offers compliant with criteria in table A3 that would maximize tariff revenue

*Col6: $LS = 1.0 - (toff/trmax)$. An * on LS indicates a toff that is less than the calculated maximum AfCFTA-compatible $trmax$.*

Source: Author from Boysen (2024, tables 4 and 5) constructed from the AfCFTA's Secretariat e-Tariff Book website in February 2024. See table A4.

Three patterns stand out in table 3.

First, despite governments' concerns about revenue, tariff revenue is less than 12%, with AfCFTA's trade share in that revenue peaking at 4% for the Democratic Republic of Congo (COD). So tariff revenue concerns are not a plausible motive not to adopt a liberalization stance in AfCFTA negotiations. Pre-AfCFTA average tariffs are highest in the CUs (except for SACU). All CUs exclude the maximum number of TLs (161), indicating that bargaining inside CUs resulted in more protectionist stance by CUs (see table A4). This probably reflects the greater influence by large members in a CU that have a more protectionist than smaller members.⁹

Second, several countries have high LS values, an indication of taking on board the AfCFTA's objective of liberalizing trade among members. (Table A4 gives details on the approximate liberalization stance across SPs). For example, Mauritius (MUS) and Seychelles (SYC) have less than 300 TLs with positive tariffs on AfCFTA, which explains their high LS values. ¹⁰ At the other end of the scale, 8 SPs have over 4000 TLs with positive tariffs. 9 of 13 SPs offers excluded the maximum (161) allowed TLs.

Four countries have offered substantial market access. Algeria (DZA) kept a small number (36) of TLs on the exclusion list with a strong reduction in protection to an average of (0.6%), well beyond the 3.0% required by AfCFTA modalities. Similar remarks apply to Egypt (EGY) and Tunisia (TUN). All 4 countries have high LS indices in column 6.

⁹ Among CUs, SACU has the lowest pre-AfCFTA average applied tariff on extra-CU African trade. The ranking conforms to the comprehensive estimates reported in Teti (2024).

¹⁰ Mauritius and Seychelles have the highest LS values because they have negligible market access to offer.

Third, offers of EAC and ECOWAS are close to offers they would have made, had they sought to maximize their revenue from tariffs on AfCFTA trade. If both SPs exclude 161 TLs in their final offer, the final offers would result in 5326 currently positive TLs set to zero for ECOWAS and 3093 for EAC. For these two RECs that have submitted lists acceptable to the AfCFTA secretariat, negotiators have followed the well-trodden path of excluding products with the highest tariffs. Goods in categories B and C ('OUT') in EAC [ECOWAS] have an average tariff of 29% [23%], as opposed to 11% [11%] for goods in category (IN'). (Melo and Solleder forthcoming, figure 4). This pattern of exclusions is a 'kiss of death' for the development of continental supply chains.

4.2 ...but slow progress on harmonization towards user-friendly Product-Specific Rules of Origin (PSRO).

Second, Rules of Origin (RoO) must be harmonized to ensure that only bona fide African products benefit from tariff concessions. Negotiations on regime-wide and Product-specific Rules (PSR) take place at the REC level. Agreement on regime-wide rules has been reached (see details in Gourdon et al. 2021) but not on (PSRO). Agreement must be reached on both and for all RECs.

Negotiations towards harmonization started in 2018. Figure 4 shows that 7 years into the negotiations, negotiators are yet to agree on 408 PSRO (~8% of TLs). There is some choice among rules. This gives some flexibility (see the number of sectors with either CTH or RVC 40% (1152 sectors); Or CTH or RVC 40%, or SP (863 sectors). But this choice is less than in the case of ASEAN (Cadot et Ing (2016)).¹¹ Negotiations have stumbled in sectors with high preferential margins. These are sectors where REC-level PSRO were already the most restrictive (as captured by high values for the restrictiveness R-index), and these were also the sectors most engaged in supply chain trade (e.g. textiles, autos and motorcycles) (Gourdon et al. 2023).

¹¹ Under ASEAN importers have a choice of ROO on 64% of TLs and under AfCFTA on 17% of TLs. 3.1% of TLs with WO rule under ASEAN and 17% under AfCFTA.

Figure 4. Status of Rule of Origin Negotiations on Product-Specific Rules (PSRs) under AfCFTA (April 2025)



Notes: CTH: Change of Tariff Heading; SP: Special Process; RVC: Regional Value Content

Source: ITC: [Rules of Origin Facilitator](#)

How restrictive are these PSRs under negotiation? Difficult to assess because few countries report Preference Utilization Rates (PURs). See WTO (2024) compendium of studies covering PURs). However, case studies (mostly from textiles & apparel where preference margins are high) give strong evidence that products with high preference margins have more restrictive PSRs (i.e. high R-index values---see definition in table 4) and low PURs (Carrère and Melo (2006) and Systma (2021)).

Even though case studies showing high rates of preference utilization is not sufficient to estimate their restrictiveness, high preference utilization rates are likely to reflect less restrictive PSRs. Table 4 gives suggestive evidence that PSRs still under negotiation are for high preferential margin products that happen to have restrictive PSRs.

Table 4: Comparing agreed PSRs (YES)with PSRs still under negotiation (NO)

PSR in AfCFTA a/	Pref margin b/	Regulatory similarity c/s	R-index d/
YES	11%	28	25
NO	21%	14	35

Notes: As of April 2021. All values are simple averages over all hs6 products across all countries in the 6 negotiating PTAs: Agadir, Arab League, Common Market for Eastern and Southern Africa (COMESA), East African Community (EAC), ECOWAS, SADC Product-Specific Rules (PSRs) are at the HS6 product level.

a/ YES refers to PSRs where agreement has been reached, NO to PSRs still under negotiation as of April 2021.

b/ Unweighed average applied Preference margin (MFN minus preferential tariff) over the 6 PTAs

c/ The regulatory proximity index is constructed as an average of the 30 Regime Wide Rules and the proximity of PSRs based on textual overlap and regulatory similarity. A higher value indicates closer match of PSRs. See Gourdon et al. (2021, tables 5 and 7) computed over the 6 PTAs.

d/ R-index is an ordinal index based on an observation rule introduced by Estevadeordal (2000). For example, a regional value content (RVC) of 60% is more restrictive than an index of 40% and a CTC (change of tariff classification) requiring a CC (change of chapter) is more difficult to satisfy than a CTC requiring a CH (change of heading). A higher index value indicates a more restrictive PSR.

Source: Gourdon et al. (2021, table 8)

Furthermore, drawing on the Deep Trade Agreements database, Gourdon et al. (2023) estimate bilateral trade flows across 128 reciprocal Preferential Trade Agreements (PTAs) for the period 1990–2015 in which trade flows are categorized into different types of PSRs. Their estimates, based on a structural gravity model controlling for confounding factors, show that PTAs with more flexible PSRs are associated with a significantly stronger trade effect compared to those where exporters do not have a choice among PSRs or must satisfy multiple PSRs. They carry out a simulation exercise in which all PTAs radically simplify their PSRs to the adoption of flexible PSRs where importers could choose between alternative PSRs. Allowing for choice in PSR selection would have increased global trade on average by between 2.7% and 4% over the sample period.

5. Conclusions

Conflicts across Africa are still pervasive. This is a brake on market integration across Africa. A successful AfCFTA implementation would increase the opportunity cost of conflicts (Mayer and Thoenig (2008) by raising the potential gains from trade. At the same time, under AfCFTA, countries retain freedom to pursue their trade policies with the outside world. Indeed, the free trade integration route pursued by ASEAN is politically more acceptable than the deeper integration path followed by the EU. Arguably, it is probably the only implementable route to accommodate diversity across Africa.

This paper has documented that reshoring in the form of regional production networks occurred in the Asia region during 1995–2022, to a lesser extent in other regions. Reshoring has also taken in individual countries like China and India two countries of population sizes comparable to Africa, but not in Africa as documented here, a sign of remaining barriers to trade: inhospitable geography (artificial borders, ethnic and linguistic Fragmentation) and remaining policy-imposed restrictions (tariffs and RoO that act like NTBs) on intra-African trade.

Africa's position in global value chains has remained largely unchanged over the period. In 2022, the continent's backward participation (import content of exports) was about 14%, compared with 20% at the world level. Its forward participation rose to 25%, indicating that exports continue to be processed abroad before reaching the final consumer. This pattern confirms that Africa remains concentrated at the start of supply chains.

Market integration remains limited. On average over the period 2010-2022, within-REC trade averaged below 6% of GDP. Trade across RECs is smaller still, rarely exceeding 1% of GDP. By contrast, trade with the rest of the world exceeds 10% of GDP for most regions. These gaps reflect structural constraints—geography and ethnic fragmentation—as well as policy barriers.

Tariff structures confirm the scope for integration. MFN tariffs often remain in the 10–15% range. Applied tariffs across RECs are close to MFN levels, indicating limited effective preferences. Estimates of liberalization stance (LS) show heterogeneity across countries. Some countries, including Mauritius and Seychelles, exhibit high LS values, reflecting low initial tariffs. Others, including major customs unions, adopt more protectionist positions, often excluding the maximum number of tariff lines.

Progress on tariff liberalization is therefore real but uneven. More importantly, the pattern of exclusions targets high-tariff products. This limits the impact of liberalization on trade and undermines the development of supply chains.

Rules of origin remain a central constraint. As of 2025, around 8% of product-specific rules were still under negotiation. These sectors correspond to products with high preference margins and more restrictive rules. Evidence from case studies and cross-country analysis shows that restrictive rules reduce preference utilization and limit trade responses. Simulations suggest that more flexible rules could increase trade by 2.7–4%.

Taken together, these results point to a clear conclusion. AfCFTA can support the emergence of regional value chains, but only if implementation goes beyond tariff reductions. Simplification and harmonization of rules of origin are essential. Without such reforms, firms will not reorganize production within the continent.

The shift towards “made in Africa” remains possible. It will depend on reducing both structural and policy barriers to intra-African trade.

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Appendix

A1. Constructing Regions and assigning countries to regions and mutually exclusive RECs

East Asia & Pacific	Europe & Central Asia	Sub Saharan Africa	Middle East and North
Brunei	Albania	Angola	Algeria
Australia	Andorra	Benin	Bahrain (●)
Cambodia	Armenia	Botswana(◊)	Djibouti
China	Austria	Burkina Faso (◊)	Iran
North Korea	Azerbaijan	Burundi (◊)	Iraq
Fiji	Belarus	Cameroon	Israel
French Polynesia	Belgium	Cape Verde	Jordan
Hong Kong	Bosnia and	Central African	Kuwait(●)
Indonesia	Herzegovina	Republic(◊)	Lebanon
Japan	Bulgaria	Chad (◊)	Libya
Laos	Croatia	Congo	Malta
Macao SAR	Cyprus	Cote d'Ivoire	North America
Malaysia	Czech Republic	DR Congo	Bermuda
Mongolia	Denmark	Egypt	Canada
Myanmar	Estonia	Eritrea	Mexico
Latin America &	Finland	Eswatini	South Asia
Antigua	France	Ethiopia (◊)	Afghanistan
Argentina	Georgia	Gabon	Bangladesh
Aruba	Germany	Gambia	Bhutan
Bahamas	Greece	Ghana	India
Barbados	Greenland	Guinea	Maldives
Belize	Hungary	Kenya	Nepal
Bolivia	Iceland	Lesotho(◊)	Pakistan
Brazil	Ireland	Liberia	Sri Lanka
British Virgin Islands	Italy	Madagascar	
Cayman Islands	Kazakhstan	Malawi (◊)	
Chile	Kyrgyzstan	Mali (◊)	
Colombia	Latvia	Mauritania(◊)	
Costa Rica	Liechtenstein	Mauritius	
Cuba	Lithuania	Mozambique	
Dominican Republic	Luxembourg	Namibia	

Table A2: Classification of African Countries into non-overlapping RECs

REC	Description	Countries
AMU+EGY	Arab Maghreb Union + Egypt	DZA, EGY, LBY, MRT, MAR, TUN, ESH
CEMAC+STP	Economic Community of Central African States + São Tomé and Príncipe	CMR, CAF, TCD, COG, GNQ, GAB, STP
EAC	East African Community	BDI, COD, KEN, RWA, SSD, TZA, UGA
ECOWAS	Economic Community of West African States	BEN, BFA, CPV, CIV, GMB, GHA, GIN, GNB, LBR, MLI, NER, NGA, SEN, SLE, TGO
IGAD-EAC	Intergovernmental Authority on Development, excluding EAC Mmembers	DJI, ERI, ETH, SOM, SDN
SADC-COD	Southern African Development Community, excluding the DRC (now EAC)	AGO, BWA, COM, SWZ, LSO, MDG, MWI, MUS, MOZ, NAM, SYC, ZAF, ZMB, ZWE

Notes: Table assigns countries into mutually exclusive RECs. The assigned REC name reflects deviations from official membership.

Source: Krantz and Beltekian, 2024, table1

Table A3. The 3 categories of AfCFTA modalities by Tariff Lines (TLs)

Category	Label	All criteria relate to Tariffs Lines (TLs) at the HS6-level
A	Non-sensitive	Zero tariffs on at least 90% (4848) TLs to be eliminated over 5 years for non-LDCs and 10 years for LDCs.
B	Sensitive	No more than 7% (377) TLs. Non-LDCs liberalise over 10 years, LDCs over 13 years. For LDCs, liberalisation start may be delayed to year 6.
C	Excluded	No more than 3% (161) TLs may be exempted from liberalisation. The total value of these imports must not exceed 10% of the value of the average of all imports from within the AU, here over the period 2015 to 2017.

Source: Boysen and authors elaborated on AU (2017) based on HS6-2017 revision (5387 TLs).

Table A4 displays Boysen's estimates of Liberalization efforts in the tariff offers by selected countries in FTAs and by the RECs that are CUs. Column1 lists the countries (and CUs) with number of missing TLs in parenthesis for those submissions with less than 5387 lines (the number of TLs in the 2017 HS revision). 9 of the 13 submissions fall short of a complete list of TLs by about 9% (approximately 500 TLs). Also note that 5 submissions only included TLs for category A. Column 2 displays the tariff share in government revenue for each submission with the corresponding share in tariff revenue from intra-AfCFTA. Tariff revenue exceeded 10 percent of government revenue for Côte d'Ivoire, ECOWAS and Madagascar, and the share of government revenue from AfCFTA trade never exceeds exceeds 5 percent, a reflection of both a low value of intra-African trade and trade concentrated in low-tariff primary products.

Boysen carried out 3 steps to obtain repaired schedules. Step 1 involved assigning all TLs to one of the three categories in table A3, and, where necessary, assigning the missing TLs (see

column 1) to one of the three categories. Step 2 (see column 3 table A4) checks if the offers satisfy the percentage criteria in table A3 for categories A and B. Step 3 does the same for criterion C (i.e. no more than 161 excluded TLs). See column 4. For example, Côte d'Ivoire (COD) only excluded 58 TLs, but these TLs accounted for 25.1% of the value of imports. The result is the pre-ACFTA trade-weighted average repaired tariffs in column 5.

Table A4 Repair of AcFTA offers and calculation of Liberalization Stance

Importer	(%)TLs submitted for zero tariffs (cat. A) & (%)TLs (Submitted for sensitive (cat.B))	#Excluded Tariff Lines (C cat).	Average Import Tariffs (%)			Liberalization stance (LS)
			Pre-AfCFTA	Repaired data		
				Offer toff	Max. Revenue trmax	LS=1.0-(toff/trmax)
Column 1	2	3	4	5	6	7=1.0- (5/6)
(7) CEMAC	90.3 (6.8)	161 (11.7)	11.1	1.8	2.4	0.6
(6) EAC [656]*	87.8(-)	161(-)	5.9	2.6	2.6	0.0
(15) ECOWAS*	92.0(-)	161(-)	9.7	2.2	2.1	0.0*
(5) SACU [494]*	90.8(-)	161(-)	0.4	0.3	0.4	0.8
COD	89.3(7.3)	58(25.1)	10.9	1.8	2.0	0.1
DZA	89.8(7.4)	36 (2.6)	8.3	0.6	3.0	0.8
EGY	90.4(6.8)	161(8.2)	1.4	0.2	0.6	0.8
MAR [461]*	91.4(-)	161(-)	1.3	0.2	0.7	0.7
MDG	92.4 (5.4)	161(22.8)	4.3	1.0	1.6	0.3
MUS [1]	92.6(4.7)	122(4.8))	0.1	0.1	0.1	1.0
SYC [2]	97.6(0.4)	92(1.4)	2.0	1.9	2.0	0.1
TUN	89.8(6.5)	161 (3.7)	1.0	0.3	0.9	0.7
ZMB [564]*	(-)	161(-)	0.1	0.0	0.1	0.0

Notes. Only 8 regions use 2017 HS-6 revision. An asterisk (*) in column 1 indicates that TLs for cat. B and C were not submitted. These are signaled as (-) in cols. 3 and 4.

REPAIR: Missing TLs in column 1 (e.g. 656 for EAC) with zero tariffs or zero imports were assigned to category A but can be assigned to categories B or C so long as modalities in table 3 are respected. TLs with zero imports and >0 tariffs are put in category C (presumably these

TLs are perceived as important in case of an import surge by other SPs). Submissions not meeting criteria indicated in bold in columns 3 and 4.

REPAIRED ESTIMATES (cols 4-7). All average tariff estimates in columns 4,5,6 are import-weighted.

Tariffs from MAcMap 2019 data. Trade data from Baci (CEPII).HS6-2017 TLs= 5387. '—' Missing

Col. 1: number of members in CUs in parenthesis and, when missing data, number of missing TLs in brackets [] when submissions are complete (i.e. include TLs in category C).

Col. 3: # Excluded TLs (161 TLs is maximum allowable). If exclusion exceeds the limit (or import value exceeds 10% of import value), the estimate is indicated in bold. The repair to reach the minimum number of TLs needed to satisfy the criterion is transferred to category A, starting with the TLs with the lowest tariff rates.

Col.5 : Trade-weighted corrected pre-AfCFTA average tariff on imports from African partners (assumed zero for intra-CU trade)

Col. 6. Tariff offer (toff) constructed from repaired data

col. 7: Constructed AcFTA-compliant Tariff offers that would maximize tariff revenue (trmax)

*col.8: LS= 1- (toff/trmax). An * on LS indicates a toff that is less than the calculated maximum AfCFTA-compatible trmax.*

Source: Author from Boysen (2024, tables 4 and 5) constructed from the AfCFTA's Secretariat e-Tariff Book website in February 2024.

Table A5: States of the Africa Union and their membership in Regional Agreements

Region	Country	Customs Union	FTAs		RECs	
South	Angola		SADC-FTA	SADC	ECCAS	
	Botswana	SACU	SADC-FTA	SADC		
	Eswatini	SACU	SADC-FTA	COMESA-FTA	SADC	COMESA
	Lesotho	SACU	SADC-FTA	SADC		
	Madagascar		SADC-FTA	COMESA-FTA	SADC	COMESA
	Malawi		SADC-FTA	COMESA-FTA	SADC	COMESA
	Mauritius		SADC-FTA	COMESA-FTA	SADC	COMESA
	Mozambique		SADC-FTA	SADC		
	Namibia	SACU	SADC-FTA	SADC		
	Seychelles		SADC-FTA	COMESA-FTA	SADC	COMESA
	South Africa	SACU	SADC-FTA	SADC		
	Zambia		SADC-FTA	COMESA-FTA	SADC	COMESA
	Zimbabwe		SADC-FTA	COMESA-FTA	SADC	COMESA
East	Burundi	EAC	COMESA-FTA	EAC	COMESA	ECCAS
	Comoros		COMESA-FTA	COMESA	SADC	CEN-SAD
	Djibouti		COMESA-FTA	COMESA	CEN-SAD	IGAD
	Eritrea		COMESA-FTA	COMESA	CEN-SAD	IGAD
	Ethiopia		COMESA-FTA	COMESA	IGAD	
	Kenya	EAC	COMESA-FTA	EAC	COMESA	CEN-SAD
	Rwanda	EAC	COMESA-FTA	EAC	COMESA	ECCAS
	Somalia			COMESA	CEN-SAD	IGAD
	South Sudan	EAC		EAC	IGAD	
	Tanzania	EAC	SADC-FTA	EAC	SADC	
	Uganda	EAC	COMESA-FTA	EAC	COMESA	IGAD
Central	Cameroon	CEMAC		ECCAS		
	Central African Republic	CEMAC		ECCAS	CEN-SAD	
	Chad	CEMAC		ECCAS	CEN-SAD	
	Democratic Republic of the Congo		COMESA-FTA	SADC-FTA	ECCAS	COMESA
	Equatorial Guinea	CEMAC		ECCAS		
	Gabon	CEMAC		ECCAS		
	Republic of the Congo	CEMAC		ECCAS		
	São Tomé and Príncipe			ECCAS	CEN-SAD	
						SADC
West	Benin	ECOWAS		ECOWAS	CEN-SAD	
	Burkina Faso	ECOWAS		ECOWAS	CEN-SAD	
	Cape Verde	ECOWAS		ECOWAS	CEN-SAD	
	Côte d'Ivoire	ECOWAS		ECOWAS	CEN-SAD	
	Gambia	ECOWAS		ECOWAS	CEN-SAD	
	Ghana	ECOWAS		ECOWAS	CEN-SAD	
	Guinea	ECOWAS		ECOWAS	CEN-SAD	
	Guinea-Bissau	ECOWAS		ECOWAS	CEN-SAD	
	Liberia	ECOWAS		ECOWAS	CEN-SAD	
	Mali	ECOWAS		ECOWAS	CEN-SAD	
	Niger	ECOWAS		ECOWAS	CEN-SAD	
	Nigeria	ECOWAS		ECOWAS	CEN-SAD	
	Senegal	ECOWAS		ECOWAS	CEN-SAD	
	Sierra Leone	ECOWAS		ECOWAS	CEN-SAD	
	Togo	ECOWAS		ECOWAS	CEN-SAD	
North	Egypt		PAFTA	COMESA-FTA	COMESA	CEN-SAD
	Algeria		PAFTA		AMU	
	Libya		PAFTA	COMESA-FTA	AMU	COMESA
	Morocco		PAFTA		AMU	CEN-SAD
	Mauretania				AMU	CEN-SAD
	Sudan		PAFTA	COMESA-FTA	COMESA	CEN-SAD
	Tunisia		PAFTA	COMESA-FTA	AMU	COMESA
	Western Sahara					CEN-SAD

Note: Entries marked in light red indicate that the accession of the respective country to the stated agreement is currently under negotiation.

Source: Böschmeier, et al. table A1

“Sur quoi la fondera-t-il l’économie du monde qu’il veut gouverner ? Sera-ce sur le caprice de chaque particulier ? Quelle confusion ! Sera-ce sur la justice ? Il l’ignore.”

Pascal



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