

# **Evolving wave of competition in the international market: Challenges for Africa through the rise of China and India**

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## **Evolving wave of competition in the international market: Challenges for Africa through the rise of China and India**

### **Introduction. The broad setting**

The remarkable economic growth of China and India combined account for one-third of the global population, and together with their progressive integration into the global economy over the last decades, this has left its mark on international trade flows. Their role in international trade is bound to be further enhanced if, as expected, their very high GDP growth continues.

China's outstanding trade growth has already made it the world's third-largest trader of goods and services, the second-largest exporter of manufactures and a major importer of fuels and other raw materials (e.g. iron ore, copper, cotton). India's strength in global markets lies with services exports. In particular, software services for which it has become a major global supplier. India's merchandise exports are still relatively small (less than one per cent of world exports) and its exports of manufactured goods are less than one-tenth those of China. Both China and India are large net-importer of fuels and raw materials. Linked to the vigorous growth in these economies is their import demand for fuels and raw materials which surged in the past and is expected to continue its dynamic growth in the medium term.

The rising import demand of China and India corresponds well with Africa's major traditional export items (i.e. crude petroleum, diamonds, gold, cotton, copper, aluminium/alumina, and fish (see Appendix Table 1)). The African region benefits not only from the real increase in the demand from these two countries for its products, but also to a strengthening of prices for many primary commodities caused by this new additional demand. These benefits are not only limited to those exporting primary goods to China but also indirectly to all other primary goods exporters with no trade links to China/India. Higher prices for its exports and perhaps somewhat weaker prices for imports of manufactures, due to the reliance on more competitively priced Chinese goods than those of traditional suppliers, could lead to a marked structural improvement of the terms of trade of Africa as a group.

The strength of the current commodity boom contributed greatly to the high GDP growth in Africa in recent years which was well above the long term average trend for the fourth consecutive year.<sup>1</sup> However, a number of observers are concerned that "poorly handled a resource boom can easily become a resource curse".<sup>2</sup>

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<sup>1</sup> OECD, African Development Bank, African Economic Outlook 2006/07

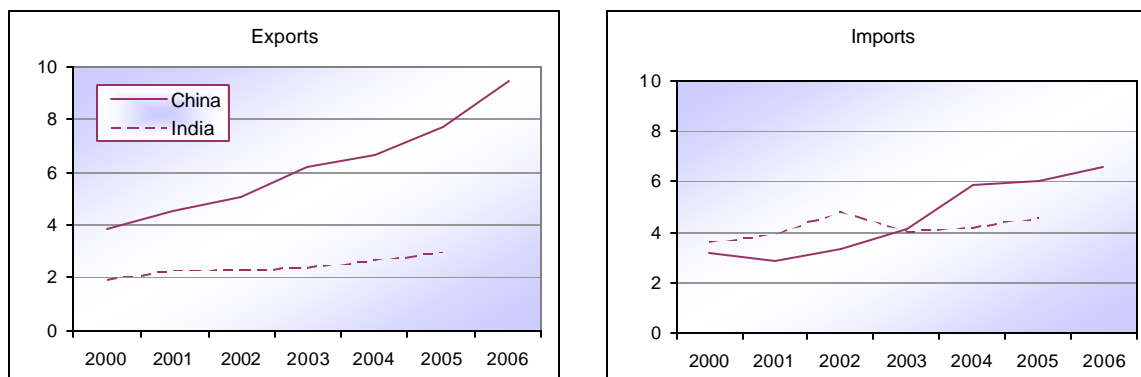
<sup>2</sup> Kaplinsky R., McCormick D. and Morris M.(2006), The impact of China on Sub Saharan Africa.

While in the present situation the expansion of Africa's merchandise trade with China and India is complementary given the respective commodity export and import structures and profitable for all parties involved, the question might be asked whether this current division of labour corresponds also to Africa's longer term objective to diversify its export structure and that trade should contribute to the industrial development of African economies. There could be a risk that the expansion of the mining sector could divert financial and human resources away from other sectors (agriculture, manufacturing and services) which would face increasing costs for domestic inputs and at the same time increased competition from somewhat cheaper imports (in particular in the manufacturing sector). In any case even if product diversification (of the African region) is currently not fostered by trade with China and India, some diversification of export markets was achieved. The emergence of China and India as major export markets reduced already somewhat the dependence of African shipments on the evolution of the European and North American markets which still accounted for more than two-thirds of African exports in 2005.

The interest of China (and India) to develop exchanges with Africa has led to a considerable increase in FID outflows and project finance to the African countries which is often intended to improve the export capacity and infrastructure. FDI flows and projects financed in the context of economic cooperation can provide not only fresh capital investment but also knowledge transfer. This is not a one way street. South African companies have also invested in China bringing their know-how in mining but also in modern brewing technologies to this country.

While all these trade and investment developments have been very dynamic in recent years, the bilateral trade and investment flows between Africa on one side and China and India on the other side are still a rather small part of Africa's overall trade and investment inflows. In respect to merchandise trade it is estimated that about one tenth of Africa's merchandise trade (exports plus imports) are with these two countries in 2005 (see Chart 1). One should also remember that the aggregate regional data conceals rather large differences at the country level in respect to the importance of trade with these two Asian economies.

**Chart 1: Share of China and India in Africa's merchandise trade, 2000-2006**  
(Percentage)



In the following section A. detailed review of African merchandise exports to China and India is offered and complemented by information on FDI and trade policy development which could affect Africa's merchandise export growth to these countries in the future. Thereafter in section B the focus is on the competition between African exporters and those from China and India on major third markets. The last section C looks at the emerging competition for African exporters and domestic industry from China and India in African markets. The paper concludes with the main findings.

### **A.1. China and India as African export markets.**

Africa's merchandise exports to China increased fourfold between 2000 and 2005 to reach \$18 billion.<sup>3</sup> Shipments to India are estimated to have doubled in that period and accounted for more than \$10 billion in 2005.<sup>4</sup> There is some uncertainty about the size of Africa's shipment to India which is most likely somewhat understated in latest WTO estimates.<sup>5</sup> By 2005, China has become the third and India the fourth largest export market for African goods (Counting the EU(25) as a single

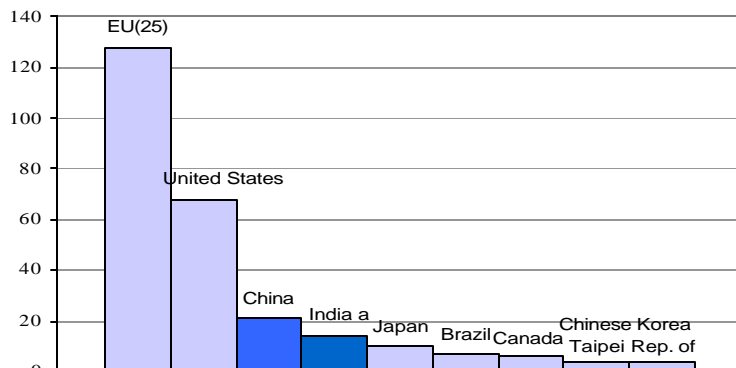
<sup>3</sup> In 2006, China's imports (c.i.f.) from Africa rose by a further 37 per cent to a new record level of \$28.8 billion. In the first four months of 2007 Chinese imports from Africa increased by 10.4 per cent to \$9.9 billion. The more moderate increase can be linked to lower oil prices in the first months of 2007 compared to those a year ago. China's exports to Africa continued to rise unabatedly at 43 per cent to \$9.8 billion.

<sup>4</sup> See WTO, International Trade Statistics 2006. African exports (the combination of data for more than 50 African countries) are provided in some product and regional breakdown in regular WTO/ITS statistics. For African exports at a more disaggregated partner country or/and product level the individual African partner statistics are used which are often more up to date and more accurate. However, in the case of Indian imports the official trade returns provide an incomplete picture as oil imports are not shown by origin. Therefore an allocation of Indian oil imports by region/country has to be undertaken in order to get a realistic picture of Indian imports from Africa. Adjusted Indian imports from Africa in FY 2005-06 are estimated to be \$14.1 billion. Adjusted for the c.i.f valuation and for calendar year this could correspond to African exports (fob) to India of about \$12 billion in 2005.

<sup>5</sup> India does not report the origin of its fuels exports and many African oil exporters do not provide details on the destination of their oil shipments. There are strong indications that the WTO/ITS 2006 estimate on Africa's exports to India is too low.

market) (see Chart 2). On the basis of new WTO estimates China and India combined accounted for somewhat more than 10 per cent of Africa's exports in 2005, about the size of intra-African trade.

**Chart 2: Africa's exports to major destinations, 2005**  
(Billion dollars)



a Refers to FY 2005/06 . *Note*: Based on imports (c.i.f.) of Africa's trading partners. *Source*: Appendix Table 2

By far the most important product category in Africa's exports to China and India is fuels. It is estimated that African fuels exports to China and India amounted to \$13 billion and about \$8 billion respectively in 2005.

Looking at China's imports statistics for the year 2006 one notices that 85 per cent of China's imports from Africa consist of fuels and other mining products, nearly 7 per cent of agricultural products and 6.5 per cent of manufactured goods (see Appendix Chart 1b).

Following crude oil, the second largest product category in Africa's exports to China are ores, minerals and non-ferrous metals (copper, aluminium, etc) which amounted to \$1.9 billion or 10 per cent of total shipments in 2005. Africa's agricultural products have also increased sharply and amounted to \$1.2 billion in 2005. African exporters expanded their merchandise shipments to China even faster than the rest of the world. Africa's share in China's total imports increased from 2.5 per cent in 2000 to 3.6 per cent in 2006. Most of this increase can be attributed to fuels. In 2006, Africa supplied nearly 24 per cent of China's fuels imports after nearly 18 per cent in 2000. African exporters increased also their market share in agricultural products by 0.7 percentage points to 3.8 per cent in 2006 and even in manufactured goods a small rise to 0.3 per cent could be observed. The available data indicate that Africa succeeded in all three broad product categories to expand its share in China's imports between 2000 and 2006.

The importance of China in Africa's merchandise exports differs significantly by product category. The share of shipments to China in total African exports exceed the 10 per cent level for ores and

minerals (17 per cent) and agricultural raw materials (11 per cent) and remain in the 5 to 10 per cent range for fuels (7 per cent), non-ferrous metals (6 per cent) and iron and steel (7 per cent).

Available data for African exports to India suggest that beside fuels (about \$8 billion), gold (\$1.4 billion), chemicals (\$0.8 billion) and agricultural products (\$0.7 billion) are other important items. In relative terms the share of the Indian market in African exports by products exceeds the average level for gold (about one third), chemicals (other than pharmaceuticals) (9 per cent) and agricultural raw materials (5 per cent). The product structure of India's merchandise imports from Africa is estimated to consist for 71 per cent of mining products (of which fuels alone account for two thirds). Imports of manufactures (mainly chemicals) account for 11 per cent, gold 12 per cent and agricultural products 6 per cent (see Appendix Chart 2b).

India's official trade returns (and those provided to UN Comtrade) do not provide a complete picture in respect to the importance of Africa as a supplier to the Indian market. First, India's oil imports are not broken down by country/regional origin and therefore two thirds of India's imports from Africa are not shown. Second, even if one has adjusted for the large missing bi-lateral oil flows the picture is most likely still incomplete due to large indirect imports, i.e. goods which are transhipped via third countries to India. In this respect, it is not unlikely that a large part of India's raw diamond imports from Belgium, Hong Kong China, the UAE and the UK (valued at \$ 9 billion in FY 2005/06 and cut and polished in India) originate for a large part from African mines. Official Indian import statistics report only negligible amounts of diamond imports from Africa. One should also expect that a part of Africa's gold exports to the Middle East and Europe is eventually imported and transformed into jewellery in India. India's gold imports from non-gold producing countries, such as Switzerland (\$5.4 billion), the United Kingdom (\$0.4 billion) and from the UAE (\$1.3 billion), amounted to more than \$7 billion in FY2005/06 or four times more than direct imports from South Africa. The dollar value of these indirect imports could match that of fuels in Indian imports from Africa.

The outstanding feature of Africa's exports to China and India is their high concentration on mineral products. The importance of these unprocessed primary products is much larger in African exports to the two Asian economies than in its exports to the world in general and in particular in its shipments to Europe its major trading partner (see Appendix Table 2b ). However, imports of the United States and Canada from Africa are even more concentrated on mining products than India's imports.

The trade overview on the aggregate regional level above cannot reveal the importance of trade with China and India at the country level. As many African countries do not report regularly in detail their exports the following summary contains a number of estimates. Available data complemented with

estimates indicate that Sudan is an outstanding case as it is the only African country which exports in 2005 more than 70 per cent of its exports to China. Five other countries exported between one-quarter and four fifth of their total merchandise exports to China (e.g. Congo, Burkina Faso, Benin Angola and Equatorial Guinea) while for Tanzania, Zimbabwe and Gabon exports to China accounted for slightly more than 5 per cent of total exports in 2004-05. In all, only 9 out of 53 African countries had until 2005 a major export interest in the Chinese market.<sup>6</sup> Five of them are oil exporters which would have no difficulty to sell their major export item anywhere on global markets. The cotton exporter, however, depend more strongly on China and India in recent years. The fragmentary data on African countries exports to India reveal that five countries report India as a major export market: Benin (7 per cent), Egypt (5 per cent), Nigeria (about 10 per cent), Senegal (13 per cent) and Togo (6 per cent).(see Appendix Tables 3 and 4).

(A recent study by NORAD and SIDA<sup>7</sup> has shown some African export success stories in the field of agricultural products concerning five non-traditional products (fish, horticultural products, fruits/vegetables, prawns and mangos) from five countries (Kenya, Uganda, Tanzania, Mozambique and Mali). Having updated the data up to the year 2005 the success stories – as measured by the dollar value of exports in these categories continued but the destination of these shipments was largely concentrated on the EU market. In this small, unrepresentative sample China and India did appear as an export destination).

The current situation of African exports to China and India can be described as being in a very strong expansion and of major importance to a dozen of African countries while accounting overall for somewhat more than 10 per cent of Africa's merchandise exports(2005). This means that exports to these two countries is about the same size as intra African trade. The share of Africa in China's imports has increased not only for fuels but also for agricultural products and manufactured goods. Looking at the share of China and India in African countries exports one has to keep in mind that one measures only the direct impact of the new demand stemming from the rise of China and India. The indirect impact through higher prices for shipments to third countries is not caught in this measure. India is most likely a more important market to African products than indicated by bi-lateral trade flows as transshipment of some African goods via third countries are potentially quite large (e.g. diamonds and gold).

The expansion of African exports to China and India depends in the short run much first on the import demand growth of these countries and second on the strength of commodity prices in particular oil,

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<sup>6</sup> Defining "major interest" as a share in exports exceeding 5 per cent.

<sup>7</sup> NORAD, SIDA,(2004), Development of trade in Africa.



metals (including gold) and cotton. In the medium-term, however, the creation of a more favourable export environment, FDI inflows, project finance and product diversification could stimulate the volume and diversify African merchandise exports. The following part looks therefore at foreign direct investment and the trade policy of China and India in respect to Africa.

## **A.2. Foreign direct investment flows between China, India and Africa.**

Africa's inward FDI stock is estimated to amount to \$264 billion at the end of 2005.<sup>8</sup> The share of China and India in this FDI stock is rather small and according to official BOP statistics less than 2 per cent at the end of 2005.

China's foreign direct investments in Africa have received some attention in recent years. Most of these investments are in the energy sector and in other natural resources and sometimes in countries which have difficulties to attract investment from other sources. In this respect it is noteworthy to recall that the ownership of Chinese FDI is largely with state-owned or state-controlled companies in contrast to the multinationals from developed countries which are mostly private owned. Over the last three years China's FDI flows to Africa have risen sharply and represent a new development. However, the current level of recorded FDI flows is still relatively small if one takes a regional perspective. China's balance of payments reported an FDI outflow to Africa of nearly \$400 million in 2005 and a cumulative Chinese FDI stock in Africa of \$1.6 billion at the end of 2005. Despite the sharp rise of Chinese FDI flows to Africa the share in total African FDI inward stocks remained below 1 per cent in 2005. Five countries (Sudan \$352 million, Algeria \$171 million, Zambia \$160 million, South Africa \$112 million and Nigeria \$94 million) account for more than 56 per cent of China's FDI stock in Africa. There are numerous announcements in the press about new big investment deals between China and African countries in 2006 and 2007 which should contribute in the near future to a further steep rise in the bilateral trade flows.

A particular aspect of China's engagement in Africa is reflected in its foreign economic cooperation programme. Africa accounts for a prominent share in this global programme. The activities of the programme cover "contracted engineering projects", "labour services" and "design consultation services" and the cumulative value of these projects in Africa exceeds largely the stock of direct China's foreign direct investment flows to Africa. About \$18 billion have been invested/transferred by China in project finance over the six year period 2000-06. At the country level these economic cooperation projects are somewhat more concentrated than FDI flows (Sudan 19%, Algeria 15% and Nigeria 11%). These projects represent largely overseas projects financed by the Chinese government

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<sup>8</sup> UNCTAD(2006), World Investment Report 2006, Annex table B.2.

through its foreign cooperation programme but includes also civil engineering projects financed by foreign investors (see Appendix Table 10). About 56369 Chinese workers had been employed in civil engineering projects in Africa at the end of 2005. Through labour services contracts another 25309 Chinese workers are employed in Africa according to official Chinese sources.<sup>9</sup>

The stock of India's total FDI abroad is reported by UNCTAD to amount to \$9.6 billion at the end of 2005. India's foreign direct investment outflows are not published by region but the UNCTAD Secretariat obtained from Indian authorities the data on the stock of India's FDI in Africa. According to this compilation Indian FDI in Africa amounted to nearly \$2 billion at the end of 2004.<sup>10</sup> India's FDI in Africa are highly concentrated on only two countries, Sudan (\$ 912 million) and Mauritius (\$949 million) account together for 95 per cent of India's FDI stock in Africa. Indian FDI in Sudan are employed in the fuels sector while those in Mauritius are concentrated in the financial sector.

### **A.3. Trade policy of China and India in respect to African products. Do China and India provide trade preferences to African merchandise exporters?**

Over the last decade China and India have substantially lowered their tariff protection, a favourable development also for African exporters. The simple applied MFN tariffs decreased to 9.9 per cent (2006) and 19.2 per cent (2005) respectively.<sup>11</sup> However, the average MFN tariff applied in China and those of India remain considerably higher than those of the EU or the United States. In addition, preferences granted by the EU and the US to African countries reduce substantially tariff levels—often to nil—while African exports to China get some preferences and none on the Indian market. Appendix Table 5 reports the average weighted tariff including preferences which African exporters face in China, India, the EU and the United States. The tariff information shown reflects through its weighting pattern the tariff barriers for current trade flows and need to be interpreted with caution given the sometimes high product concentration and the relative small trade flows involved / (for non-oil exporters). Nevertheless, the data reveal that tariffs remain at present for the current export pattern often a major obstacle to African non-oil exports to China and even more so to India.<sup>12</sup>

China's trade policy has recently started to encourage Africa's merchandise exports to China by introducing trade preferences for a number of African countries. Since January 2005 China has granted to African LDCs duty free entry for 183 tariff items which represents a preference margin of

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<sup>9</sup> China National Bureau of Statistics(2007), China Trade and External Economic Statistical Yearbook, 2006.

<sup>10</sup> UNCTAD(2007) Asian Foreign Direct Investment in Africa. Table 1.5.

<sup>11</sup> WTO(2007), Tariff Profiles 2006.

<sup>12</sup> The high tariff averages flagged by the WTO Tariff Profiles could be misleading in respect to African cotton exporters due to the prevalence of in- and out-of quota tariffs.

nearly 10 per cent for this products.<sup>13</sup> At the China-African Summit in 2006 the Chinese government announced that it will extend the duty free list to about 400 tariff lines from 2007 onward. Once implemented more than 10 per cent of China's 7637 tariff lines (2007 tariff) will be duty free for African LDCs.

Until now India has not provided any preferential duty rates for African LDCs. However, the Indian government has expressed its willingness to grant such preferences and some observers believe that with the preferential tariff treatment elaborated in the framework of the renewed SARC agreement India would/could extend these preferences also to African LDCs. On the occasion of India's Trade Policy review discussion in Geneva in May 2007 the representative of India declared that the Indian government " proposes to introduce in a phased manner, the Duty Free Quota Free Scheme for LDCs this year."<sup>14</sup>

According to World Bank estimates the average tariff rates in 2005 on Africa's exports to Asia are several times larger than those of the EU and the United States for both LDCs and Non-LDCs in Africa. The difference is particularly large in respect to tariffs on imports from African LDCs.<sup>15</sup>

India has taken more anti-dumping actions (AD) than any other WTO member over the 1.1.1995-31.12. 2006 period according to the WTO data base on AD which allows to track each WTO members action against other countries. A review of India's anti-dumping actions by country revealed that out of its 457 actions only six had been taken against African countries. Since 2000, India has taken six anti-dumping actions against South Africa exporters. The products concern are four chemical and two steel products.<sup>16</sup>

## **B. Africa's merchandise exports in competition with Chinese and Indian exports in world markets.**

A thorough review of the competition between African and Chinese or Indian exporters should be done at a product level in individual regional markets. However, this is beyond the scope of this short paper. Available data at the WTO Secretariat allow to get a broad picture at a more aggregated level which indicate that African exporters maintained or increased their shares in world trade and regions

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<sup>13</sup> World Bank(2006), Broadman, H.G. Africa's Silk Road. Table 3.13, World Bank 2006

<sup>14</sup> WTO, Trade Policy Review: India, 23-25 May 2007. Reply on behalf of India by Mr G:K: Pillai, Commerce Secretary, Government of India

<sup>15</sup> World Bank(2006), Africa's Silk Road, Tables 3.1 and 3.2

<sup>16</sup> WTO, Anti-dumping actions data base

between 2000 and 2005. Again it should be recalled that only merchandise trade is considered and competition in the services sectors (such as tourism) are not considered.<sup>17</sup>

An overview of Africa's participation in world merchandise exports since 2000 can be broadly summarized in a few sentences. Africa's share in world merchandise exports increased by half a percentage point to 2.9 per cent between 2000 and 2005. All of the increase occurred between 2002 and 2005 when oil and other commodity prices started to recover. China and India increased their share over that period by 3.5 and 0.3 percentage points respectively. Africa's gains in market share had been large in North America (1.2 percentage points), in South America (0.6 percentage points) and in Asia (0.3 percentage points). Although Africa's merchandise exports expanded faster than the global average since 2000 its exports account for less than 3 per cent in all major regions' imports, except in Africa. Intra-African trade is estimated to amount to about 11 per cent of Africa's merchandise imports (2005).<sup>18</sup>

As both China and India are large net-importer of fuels the competition between these two countries' exports and those of Africa are concentrated mainly in the agricultural, non-fuels minerals and manufacturing sector. Agricultural product exports of Africa (\$32 billion in 2005) continue to exceed those of China (\$28.7 billion) and India (\$9.3 billion). Africa's exports of agricultural products expanded faster than global exports and that of India but lagged behind the expansion of China's exports. While Africa exports most of its *agricultural products*<sup>19</sup> to Europe those of China are directed largely to Asia. In the European market the share of Africa decreased slightly while that of China advanced moderately during the 2000-05 period. Only a more detailed analysis at a product level could reveal if the decline in Africa's share is related to the expansion in the Chinese market share. In the 2000-05 period, African exports of agricultural products gained market share in the North American market but China's gains had been even stronger (1.6 percentage points versus 0.5 percentage points). The development of market shares in Asia and the Middle East is similar to those on the European market with Africa's share stagnating or decreasing while that of China advanced further. The share of India in the imports of agricultural products of the major regions remained unchanged between 2000 and 2005. Africa and India account both for about 5 per cent of agricultural imports into the Middle East. According to very tentative estimates India's share was maintained while that of Africa decreased somewhat in this market. Overall Africa's agricultural

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<sup>17</sup> In 2005, travel receipts of Africa matched with \$29 billion those of China and exceeded those of Africa (\$6.5 billion). Africa's travel receipts increased not only faster than the world but also faster than those of China and India since 2000.

<sup>18</sup> WTO, International Trade Statistics 2006, Appendix table A2.

<sup>19</sup> It should be recalled that the WTO, ITS definition of agricultural products used above includes fish and processed agricultural products and differs from the WTO-AOA definition.

exports hold up well as they expanded faster than the world average and faster than those from India but less rapidly than those of China.

Turning to trade in *manufactures* one has to take note first that China exported ten times more manufactured goods than either India or Africa in 2005. The bulk of China's exports of manufactured goods are today electronic products, a product category which is almost non-existent in Africa's or India's manufactures exports. China's share in world exports of manufactures doubled between 2000 and 2005 reaching 9.6 per cent while those of Africa and India increased only marginally (0.1 and 0.2 percentage points) and accounted each for less than one per cent of world exports at the end of that period. China's dynamic export growth resulted in a doubling of its share in all regions with the exception of Asia. In 2005, China's share in Asia stood at 14.1 per cent and thereby somewhat larger than in the North American market. According to the available data African exporters of manufactured hold roughly their share in Europe its largest export market and gained somewhat in Asia its second largest market.

Africa's major manufactured goods exports are in descending order: semi-manufactures (including diamonds), chemicals (excluding pharmaceuticals), clothing and iron and steel products. Africa's share in world chemicals exports (excluding pharmaceuticals) increased from 1.0 to 1.1 per cent between 2000 and 2005. Over the same five year period, Africa's share remained unchanged for semi-manufactures and iron and steel but decreased for clothing. (At a more disaggregated product level Africa's share can be much larger than for a group average and the evolution of Africa's share shows a larger year to year variation.)

The expansion of China's exports in the four broad product groups indicated above was two times faster than the global average over 2000 and 2005. India's exports in these four product categories expanded in all much faster than Africa's exports and exceeded or matched the global average. This leads to the conclusion that African exporters have participated with less success than their Chinese and Indian counterparts in the global trade expansion in the four largest manufactured goods of current interest in Africa.

It is in the clothing sector in which Africa's exports lag with a considerable margin behind not only of China's and India's clothing exports but also that of the global average growth (see Appendix Table 11). In 2005, Africa's clothing exports to the EU and the United States decreased and the recovery of shipments in 2006 was weaker than the average import growth.

Africa's exports of clothing are largely concentrated on two markets: the EU(25) and the United States. African clothing exports to EU(25) are largely from Northern Africa (ranging between 83-88 per cent in the 2000-05 period) while those to the United States originated above all from Sub-Saharan Africa (59-72 per cent). African clothing exports to the EU(25) had been in size 3 to 4 times larger than exports to the United States during the 2000-2005 period.<sup>20</sup>

The share of African clothing exports in EU(25) imports (excl. intra-EU trade) decreased steadily from a peak level of 14.1 per cent in 2001 to 10.1 per cent in 2005. The relative decline concerned both North African and Sub-Saharan exporters.<sup>21</sup> In 2006, Sub-Saharan clothing exports recovered strongly while those of North Africa expanded by less than 4 per cent to the EU(25).

The evolution of Sub-Saharan African clothing exports to the United States differed largely from those to the European markets. Under the impact of AGOA and Asian FDI in Africa, US imports of clothing from Sub-Saharan Africa more than doubled between 2000 and 2004 but decreased sharply in 2005. At the beginning of 2005 all remaining clothing quotas of the WTO Agreement on Textiles and Clothing (ATC) were lifted which contributed to a surge of imports from previously restricted suppliers. Both China and India sharply increased their share in EU(25) and US imports. North African textiles/clothing exporters fared better in 2005 than the Sub-Saharan exporters on the US market. The latter group recorded steep export declines while the former increased the level of its shipments to the United States.

Developments in 2006 show a further slight decrease in the share of Africa in United States clothing imports while China and India increased their share. US clothing imports from Africa increased by 3 per cent somewhat less than the average rate of 3.6 per cent. North African exporters (in particular Egypt) recorded strong gains in market shares while those from Sub-Saharan Africa decreased further by 11 per cent. In contrast US clothing imports from China and India increased by 15 per cent and 5.5 per cent respectively.

US imports in 2005 and in 2006 suggest that the preferential tariff treatment through AGOA was not large enough for Sub-Saharan suppliers to remain competitive in respect to supplies from China and

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<sup>20</sup> Europe and North America account for more than 90 per cent of Africa's clothing exports with shipments to other regions negligible except for intra-African trade which accounts for 3-4 per cent.

<sup>21</sup> For the Sub-Saharan clothing exporters an absolute decline of their clothing shipments could be observed between the years 2000 and 2005. This development can be largely attributed to the decline of clothing exports of Mauritius and Madagascar to the EU. In 2006, this development was reversed as Sub-Saharan exports of textiles and clothing to the EU increased by 11 per cent thanks to a recovery of shipments from both Mauritius and Madagascar. These two countries alone accounted for nearly 80 per cent of EU textiles and clothing imports from Sub-Saharan countries in 2006.

India in the post ATC period. The focus on China and India should not conceal the fact that other low income Asian developing countries, such as Bangladesh, Cambodia and Viet-Nam reported substantial increases (more than 20 per cent in 2006) in their clothing exports to the United States. Obviously, Sub Saharan African exporters of clothing suffered from the increased competition with China's and Indian clothing exporters on the US market but this competition was not limited to these two countries and have included other low income countries in Asia as well as some North African countries. African clothing exporters face increased competition in these two major markets -where they enjoy significant preferential treatment- not only from the large suppliers such as China and India but also from low income exporters mainly in Asia. The success of the latter shows that relative small suppliers can compete with the large suppliers if the conditions in the exporting country are adequate. low income countries in Asia having also preferential access to the European market might become a major competitor to Sub Saharan clothing exporters to Europe.

### **C. China and India as competitors on African markets.**

The share of intra-African trade in total merchandise imports of Africa has remained most likely unchanged at somewhat more than 10 per cent between 2000 and 2005. There is quite some uncertainty in the actual size of intra-African trade given the unknown volume of the informal trade. Much of Africa's border trade might not be registered in the official trade returns. According to WTO estimates, intra-African trade is more important for mining products (28 per cent on average for 2000-05) and agricultural products (18 per cent) than in manufactured products (about 7 per cent). According to these very crude estimates it seems that the African exporters could maintain their share in Africa's overall imports of both agricultural and manufactured goods over the 2000-05 period. It could be that for agricultural products India's share had been increasing while that of China had been decreasing over the last five years. The estimated share of these two countries combined in African agricultural imports remained below 5 per cent. The situation is quite different in the case of manufactured goods. In this sector the African imports from China and India have increased much faster than imports from all regions and also faster than intra-African trade. While intra-African trade in manufactured goods expanded at the same pace as overall imports, Africa's imports from China increased fourfold in value and doubled their share in African imports of manufactures. In 2005, the share of Chinese manufactured goods in Africa's imports is estimated to exceed slightly ten per cent. Since 2003 the dollar value of imports of manufactured goods from China exceeds intra-African trade. The share of India increased steadily but moderately and accounted for about 3 per cent of African manufactured goods imports in 2005.

The increase in the share of China and India in Africa's imports alone reflects only in an incomplete manner the impact these trade flows can have on the domestic market. First, it could be that increased

(low-priced) imports from these countries replace only (high priced imports from other sources which in the absence of a local production would increasing local welfare. If the imports from China replace local production (or production from other African suppliers) than the welfare impact is less certain. These limitations should be kept in mind in an interpretation of the rise of import shares at the country level discussed below.

At a more disaggregated product level China's share in African imports has attained a substantial level in a number of product categories. Imports from China account for about 40 per cent of Africa's total clothing imports, nearly 40 per cent of its personal and household goods imports, 30 per cent of its textiles imports and nearly 15 per cent of its telecom equipment imports in 2005. In a number of other product groups in which the share of China is still much smaller (less than 6 per cent) one could observe a doubling of the share between 2000 and 2005 (e.g. iron and steel (4.2 per cent), chemicals (excl. pharmaceuticals) (5.1 per cent), automotive products (3 per cent), other transport equipment (5.9 per cent) and scientific control instruments (5.1 per cent). The emerging picture is clear, China's share is increasing rapidly in all manufactured product categories and reached a leading position in some categories.

India's share in African imports is particularly large in textiles. India still accounted for 8.6 per cent of African textiles imports in 2005, this share is unchanged from 2000. (China's share more than doubled in these five years.) Measured in dollar terms, textiles was the most important product group in Africa's imports from India in 2000, but was overtaken by food, oil products, and chemicals by 2005. India's share in African clothing imports has most likely decreased somewhat and accounted for about 3 per cent in 2005. The most prominent share of Indian goods in African imports in 2005 was observed for pharmaceutical goods (8.5 per cent), a product group for which Indian goods recorded also a faster increase than all other suppliers combined.

At the African country level the share of China in total merchandise imports has increased markedly in most African countries over the 2000-05 period. The share of Chinese goods exceeds the regional average of 8 per cent in Sudan, Togo, Congo, Madagascar, Mauritius, Ethiopia, Gambia, Benin and Ghana (ranging from 19 to 9 per cent). Indian goods account for a prominent share (about 5 per cent) in total imports of many East African countries which often have an important Indian overseas community (e.g. Kenya, Uganda, Tanzania, Madagascar, Mauritius and Sudan) (see Appendix Tables 6 and 7).

The share of China and India in African countries imports of *manufactured goods* is reported in Appendix Tables 8 and 9. China's share in the imports of manufactures of 23 African countries (for



which we have complete 2000-05 data) increased significantly. Only in one country the share is reported to have decreased while in 14 countries the share more than doubled in the five years between 2000 and 2005. In 2005, China's share exceeds 20 per cent in imports of Sudan and Togo and ranges between 10 and 20 per cent in seven other African countries (Benin, Cameroon, Gambia, Ghana, Mauritius, South Africa and Tanzania). South African imports of manufactured goods from China amounted to \$4.7 billion in 2005, five times their value in 2000. Due to this surge in values the share of China in South African imports of manufactured goods surged from less than 5 per cent in 2000 to 12.4 per cent in 2005 (based on South Africa's import statistics).

In the same sample of 23 African countries the share of Indian manufactures increased in the imports of 16 countries, stagnated in 3 and decreased in 4 countries. India's share is the highest in manufactured goods imports Uganda (9%), Tanzania (8%), Mauritius (7%) and Malawi(7%).

*Import developments of South Africa* the region's largest market may shed some additional light on the competition from Asia. South Africa's imports of manufactured goods from China rose fivefold to \$4.7 billion between 2000 and 2005. This flow represents about one fifth of China's exports of manufactured goods to all of Africa. Textiles and clothing products alone account for \$1.07 billion. *Clothing* alone is the biggest import item of South Africa from China and amounted to \$602 million or 72 per cent of clothing imports from all regions. South African clothing imports from African countries (excl. SACU members) stagnated in dollar terms between 2000 and 2004 and despite an increase in 2005 recorded a share of only 5 per cent, just half the rate in 2000. The share of India (accounting for about 6 per cent) in South Africa's clothing imports decreased too between 2000 and 2005.

Over the same period, South African imports of *textiles* from China increased fivefold to one third while textiles imports from India doubled in dollar terms and raised their share by two percentage points to 7 per cent. The share of other African countries in South African textiles imports remained roughly unchanged at about 3 per cent.

South African imports of *personal and household goods* are also sourced largely from China. Imports from China in this category tripled between 2000 and 2005 in dollar terms and accounted for nearly 50 per cent of total imports in 2005. Imports from India and Africa increased somewhat in dollar terms but the respective shares decreased sharply by 5 percentage points to about 10 per cent.

The sevenfold increase in South African imports of *office and telecom equipment* from China did not affect imports from India as these product group is not part of its export basket. Other African

exporters ship a moderate amount of office and telecom equipment to South Africa but its value stagnated and its share declined.

As mentioned above the competition between African exporters and the two Asia giants is not limited to manufactured goods but includes also in some cases agricultural and in particular food products. Import developments of South Africa illustrate this well. South Africa's imports of food from Africa amounted to \$143 million, more than 10 per cent of South Africa's non-minerals imports from Africa in 2005. The South African import data reveals that imports from India increased fourfold between 2000 and 2005 and gained in market share while the African suppliers share was reduced. The difference in the trade performance between the Indian and African suppliers was most striking for fish products for which supplies from India have overtaken those from Africa according to our estimates.

### **Conclusions.**

The review of trade developments above has shown that African producer and exporter face increasing competition from Chinese and Indian exporters at home and in third markets while the rapid growth of these large economies provide an attractive outlet for African mineral and agricultural products.

The share of China and India combined in Africa's merchandise trade (exports plus imports) increased from nearly 6 per cent in 2000 to nearly 11 per cent in 2005. The data available indicate that African fuels and agricultural exporters have increased their share in the rapidly expanding imports of China. The marked increase of Chinese FDI in and economic cooperation with Africa in the last few years combined with the very strong growth promise a further strong expansion in African exports to China in the years to come. In India the share of African suppliers is estimated to have declined in the agricultural imports and manufactured goods imports between the years 2000 and 2005. However, over the last three years of that period a recovery in the share of Africa can be observed. In FY 2005/06 the share of Africa in India's imports of agricultural and manufactured products was nearly 12 per cent and 2.2 per cent respectively. Given the lack of official data an accurate picture of the development of Africa's share in India's fuels imports cannot be given.

African exporters of agricultural products seem to hold up to the competition from China/India on third markets. In world exports of agricultural products the share of Africa increased slightly to 3.8 percent by 2005. Most of this increase of Africa's share is due to its dynamic export growth to the North American market. The share of African agricultural exporters in the imports of Europe and Asia, the two largest markets, was roughly stable over the 2000-05 period. China and not India seems

to be a major competitor as the former increased its market share in all regions and its export value is nearly matching those of Africa in 2005.

African exporters of manufactures seem to be more severely threatened by the competition from China and India than their counterparts in the agricultural sector. Outside Africa, but increasingly also in Africa, manufactured exports of China, and to a lesser extent those of India, are serious challenge to African manufactures. In contrast to agricultural products Africa's share in world exports increased only marginally for manufactures and decreased for textiles and clothing. In the iron and steel sector the share was roughly maintained over the 2000-05 period.

Clothing/textiles is obviously a sector highly affected but in certain agricultural products competition from India cannot be neglected. After the phase out of the ATC on January 1, 2005 the share of Africa's exports in clothing imports of the EU and the United States decreased in 2005 and 2006. In 2005, Africa recorded even an absolute decline in its shipments in both markets followed by a recovery in 2006 (see Table 11).

Competition in the textiles and clothing sector is increasingly felt in African markets. South Africa, Africa's largest clothing importer, has introduced quotas on imports from China. From January 2007 onward, the growth of 31 textiles and clothing categories is quantitatively limited for the following two years. Allowed increases range from 7 to 20 per cent. Despite the very high MFN applied import duties of 38 per cent (WTO, World Tariff Profiles 2006) the domestic producers had not been able to compete successfully against imported Chinese clothing products. But restrictions at home do not help the domestic producers for their shipments to third markets. In the medium term, only through productivity increases in African firms (through better management, training and infra structure) the competitiveness can be strengthened enough to maintain and develop the industry.

In respect to the labour intensive products contained in the category personal and household goods (e.g. footwear, toys.) the rapid rise in supplies from China causes not so much a concern about a threat to existing African industries but more a challenge for the future. The establishment of an Africa (export) industry based on small and medium sized firms in a highly competitive environment dominated by established suppliers benefiting from economies of scale is a difficult task..

At present many African countries can finance the sharply higher imports due to their higher earnings from primary commodity exports. Unfortunately the rise in minerals production and exports does not provide enough jobs for the growing population and by strengthening the exchange rates might even hamper the expansion of exports of domestic agricultural and manufacturing output. Once the

commodity cycle turns, the risk will be that many of the structural problem holding back the productivity of African workers and limit the competitiveness of its enterprises have not be tackled the funds presently at hand of many governments will have vanished and the chances for fostering development through improvements in education, training and infrastructure will be gone.

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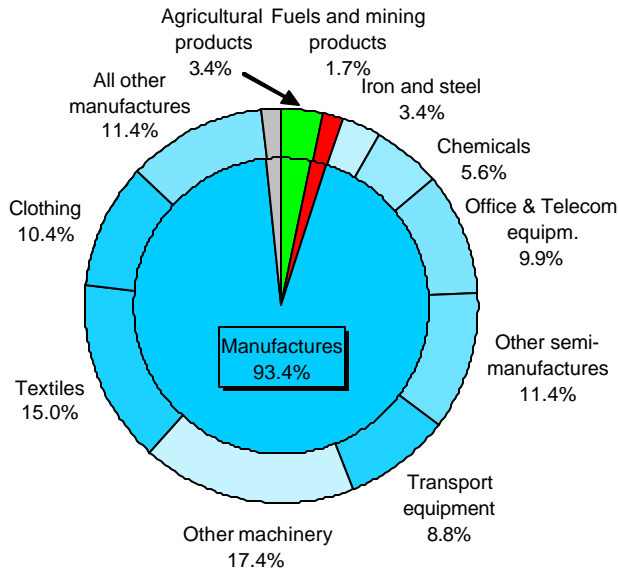
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Appendix chart 1a

**Merchandise exports of China to Africa by major product group, 2006**

(Percentage)

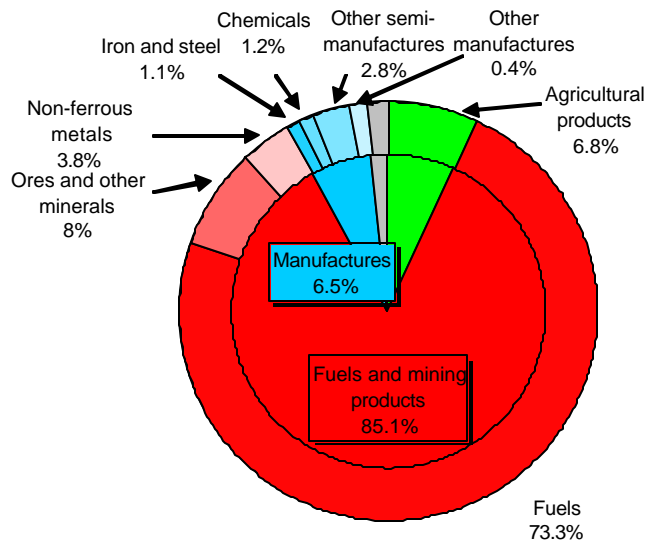


Source: UN, Comtrade.

Appendix chart 1b

**Merchandise imports of China from Africa by major product group, 2006**

(Percentage)

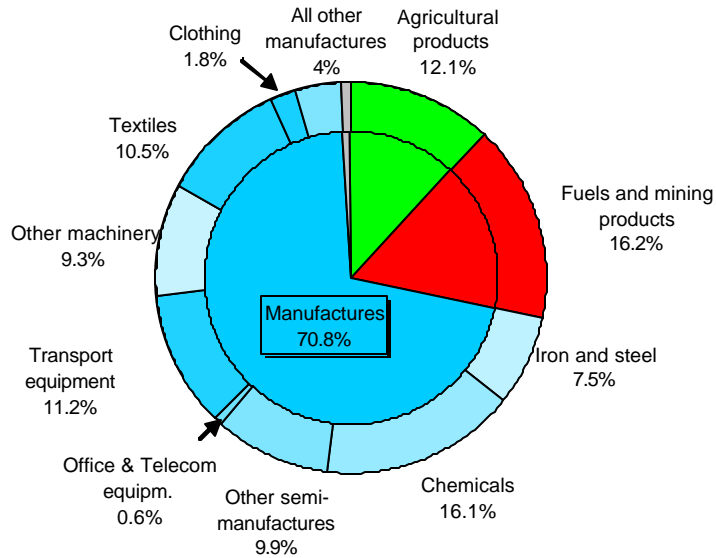


Source: UN, Comtrade.

Appendix chart 2a

**Merchandise exports of India to Africa by major product group, FY 2005/06**

(Percentage)

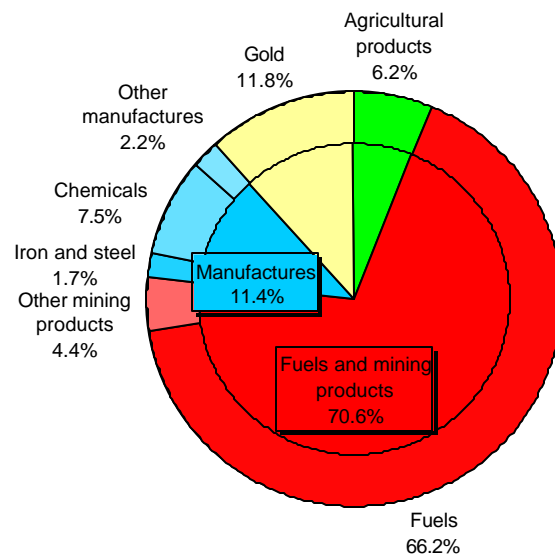


Source: UN, Comtrade.

Appendix chart 2b

**Merchandise imports of India from Africa by major product group, FY 2005/06**

(Percentage)



Source: UN, Comtrade and WTO estimates.



Appendix table 1

**Share of Africa in world exports of selected product groups, 2000 and 2005**

(Billion dollar and percentage share)

	Value	Share	
	2005	2000	2005
<b>Fuels and mining products</b>	<b>194</b>	<b>10.0</b>	<b>11.1</b>
Fuels	177	11.4	12.6
Ores and minerals	8	5.8	5.2
Non-ferrous metals	9	4.6	4.8
<b>Agricultural products</b>	<b>32</b>	<b>3.5</b>	<b>3.8</b>
Agricultural raw materials	7	4.1	4.2
(263) cotton	(3)	17.6	(25.5)
(121) tobacco	(1)	16.8	(12.9)
(292) cut flower	(0.4)	3.3	(4.0)
(245-7) wood rough	(1.0)	8.0	8.3
Food products (excl. fish)	20	3.0	3.4
(072) cocoa	(5)	38.5	(48.4)
(071) coffee	(1)	10.3	(8.6)
(057) fruits	(2)	5.1	(5.9)
Fish	5	5.9	6.3
<b>Manufactures</b>	<b>63</b>	<b>0.8</b>	<b>0.9</b>
Clothing	8	3.6	3.1
Semi-manufactures	19	2.7	2.7
(667) diamonds	(6)	10.7	(7.8)
(661) lime	(0.7)	2.7	(4.6)
(611) leather	(0.3)	2.4	(1.6)
(612) manufactures of leather	(0.0)	0.8	(0.9)
Iron and steel	6	2.0	2.0
Chemicals (excl. pharmaceuticals)	9	1.0	1.1
(522) organic chemical elements	(2.1)	8.7	(8.7)
(502) fertilizer	(1.3)	6.9	(5.9)
(551) essential oils	(0.9)	3.0	(6.1)
(821) furniture	(0.9)	0.9	(1.0)
<b>All products</b>	<b>298</b>	<b>2.4</b>	<b>2.9</b>

Note: Values and shares in brackets refer to the year 2004.

Source: WTO, International Trade Statistics 2006, WTO estimates and UN, International Trade Year Book 2004.

Appendix table 2a

**Africa's exports to major destinations, 2005**

(Billion dollars)

	Total	Mining Prod.	Fuels	Agric. Prod.	Manu- factures	Textiles& Clothing	Residual incl. gold
EU(25)	128.3	72.3	65.4	16.7	33.1	8.1	6.2
United States	67.9	59.1	56.1	1.9	6.6	2.4	0.4
China	21.1	17.3	14.6	1.7	1.7	0.0	0.5
India a	14.1	9.9	9.3	0.9	1.6	0.0	1.8
Japan	9.9	6.3	3.1	1.5	2.0	0.1	0.0
Brazil	6.9	6.3	6.1	0.0	0.6	0.0	0.0
Canada	5.7	4.7	4.5	0.4	0.5	0.0	0.2
Chinese Taipei	3.6	2.8	2.4	0.2	0.6	0.3	0.0
Korea Rep. of	3.5	2.8	1.8	0.2	0.6	0.0	0.0
Total above	260.9	181.4	163.4	23.4	47.1	10.9	9.0
<i>Memorandum item:</i>							
Africa's world exports	297.7	194.2	176.9	32.3	63.0	9.9	8.2

a. Refers to FY 2005/06.

*Note:* Based on imports (c.i.f.) of Africa's trading partners.*Source:* UN, Comtrade.

Appendix table 2b

**Product structure of Africa's exports to major destinations, 2005**

(Percentage)

	Total	Mining Prod.	Fuels	Agric. Prod.	Manu- factures	Textiles& Clothing	Residual incl. gold
EU(25)	100.0	56.3	51.0	13.0	25.8	6.3	4.8
United States	100.0	87.1	82.7	2.7	9.7	3.5	0.5
China	100.0	82.0	69.4	7.8	7.9	0.1	2.2
India a	100.0	70.2	66.0	6.1	11.2	0.1	12.5
Japan	100.0	64.0	31.8	15.6	20.2	0.5	0.2
Brazil	100.0	91.4	88.9	0.6	8.0	0.1	0.0
Canada	100.0	81.7	78.4	6.3	8.2	0.3	3.8
Chinese Taipei	100.0	77.2	66.9	5.8	16.9	8.3	0.0
Korea Rep. of	100.0	78.9	51.0	4.3	16.8	0.6	0.0
Total above	100.0	69.5	62.7	9.0	18.1	4.2	3.5
<i>Memorandum item:</i>							
Africa's world exports	100.0	65.2	59.4	10.9	21.2	3.3	2.7

a. Refers to FY 2005/06.

*Note:* Based on imports (c.i.f.) of Africa's trading partners.*Source:* UN, Comtrade.

Appendix table 3

**Share of China in merchandise exports of African countries, 2000-2006**

(Percentage)

	2000	2001	2002	2003	2004	2005	2006
Algeria	0.0	0.5	0.4	0.4	0.8	...	...
Benin	0.2	0.2	5.6	23.0	31.2	36.2	...
Botswana	0.0	0.0	0.0	0.0	...	...	...
Burkina Faso	0.0	0.0	...	0.0	0.0	...	...
Burundi	...	...	...	0.2	0.1	0.1	...
Cameroon	6.2	5.9	4.3	4.3	2.5	2.8	...
Cape Verde	...	...	...	...	...	0.0	0.0
Central African Rep.	0.0	0.7	0.3	0.1	...	0.3	...
Côte d'Ivoire	0.1	0.2	0.2	1.1	0.9	1.1	1.3
Egypt	0.8	1.0	4.7	1.6	1.6	1.0	...
Eritrea	0.4	...	0.1	0.7	...	...	...
Ethiopia	0.2	1.1	1.8	1.0	...	...	...
Gabon	6.7	5.1	4.5	19.5	6.3	4.0	10.6
Gambia	0.1	0.1	0.7	9.4	0.2	1.1	...
Ghana	1.7	1.4	...	1.4	1.1	0.6	1.1
Guinea	0.0	0.0	1.9	...	...	...	...
Kenya	0.3	0.2	0.3	0.3	0.4	...	...
Lesotho	0.0	0.0	...	...	...	...	...
Madagascar	0.7	0.8	1.0	1.4	2.1	...	...
Malawi	0.1	0.4	0.4	0.0	0.0	1.1	0.2
Mali	0.0	0.0	0.2	1.2	4.8	...	...
Mauritania	0.7	0.4	0.6	1.8	...	...	...
Mauritius	0.1	0.1	0.5	0.4	0.3	0.3	0.2
Morocco	0.5	0.5	0.3	0.8	0.5	0.7	0.9
Mozambique	0.7	0.2	0.7	0.5	1.4	1.9	...
Namibia	0.0	0.5	0.3	0.4	1.3	1.8	...
Niger	0.0	0.2	0.1	0.1	0.3	0.4	...
Nigeria	0.5	0.7	0.4	0.5	...	...	...
Rwanda	...	0.4	...	1.3	...	...	...
Senegal	1.8	1.0	0.1	1.3	0.5	1.0	0.6
Seychelles	...	...	...	0.0	0.0	0.0	...
Sierra Leone	...	...	0.1	...	...	...	...
South Africa	1.1	1.7	2.0	2.8	2.6	2.9	4.0
Sudan	43.3	58.2	46.8	65.2	68.3	76.2	...
Swaziland	0.0	0.7	0.4	...	...	...	...
Togo	0.1	0.1	1.0	2.2	4.2	2.2	...
Tunisia	0.0	0.2	0.2	0.2	0.3	0.2	...
Uganda	0.1	0.1	0.2	0.5	0.7	0.7	0.7
United Rep. of Tanzania	0.1	0.1	0.1	0.3	4.9	6.4	8.9
Zambia	0.0	0.0	0.3	1.7	2.0	2.1	...
Zimbabwe	5.2	8.7	0.6	...	5.7	...	...

**Estimates based on China imports (c.i.f.) by country and total exports of African countries**

Angola	23.3	11.0	13.1	23.2	35.0	27.3	31.1
Burkina Faso	...	...	0.3	10.1	25.9	47.1	45.0
Congo	13.0	8.8	11.0	30.4	46.0	47.5	41.2
Equatorial Guinea	29.1	29.3	18.1	14.7	21.7	20.1	28.5
Libya	0.2	0.5	0.0	0.3	2.0	3.1	4.4
Nigeria	1.5	1.3	0.8	0.3	1.5	1.2	0.5

Source: UN, Comtrade and WTO, International Trade Statistics 2007.

Appendix table 4

**Share of India in merchandise exports of African countries, 2000-2006**

(Percentage)

	2000	2001	2002	2003	2004	2005	2006
Algeria	0.2	0.1	0.4	0.1	0.2	...	...
Benin	31.7	30.7	14.2	10.1	7.4	6.9	...
Botswana	0.0	0.0	0.0	0.0	...	...	...
Burkina Faso	0.0	0.2	0.1	0.0	0.0	...	...
Burundi	...	...	0.0	0.0	0.0	0.0	...
Cameroon	0.5	0.9	1.5	0.3	0.7	0.4	...
Cape Verde	...	...	...	...	0.0	0.0	0.0
Central African Rep.	...	...	0.1	...	...	...	...
Côte d'Ivoire	2.6	2.1	1.7	1.4	1.8	1.8	1.4
Egypt	3.3	6.1	8.8	7.5	4.9	5.0	...
Eritrea	3.4	17.0	0.9	7.2	...	...	...
Ethiopia	1.6	4.3	2.6	1.4	...	...	...
Gabon	1.2	0.5	3.7	2.7	1.6	1.9	2.1
Gambia	0.7	0.0	0.0	2.2	0.3	0.0	...
Ghana	0.9	0.5	...	0.5	0.7	6.3	1.6
Guinea	0.1	0.1	0.0	...	...	...	...
Kenya	1.1	1.9	2.5	1.4	1.9	...	...
Madagascar	0.1	0.2	0.3	0.9	1.5	...	...
Malawi	0.9	0.3	0.4	0.6	0.9	0.3	0.5
Mali	...	1.2	1.3	1.2	1.2	...	...
Mauritius	0.2	0.1	0.2	0.3	0.9	0.4	0.6
Morocco	4.2	3.4	3.3	3.1	3.4	4.0	4.3
Mozambique	4.9	0.2	0.6	0.3	2.2	1.4	...
Namibia	0.0	0.0	0.0	0.0	0.0	0.1	...
Niger	...	...	0.0	0.1	0.1	0.0	...
Nigeria	14.5	11.5	11.6	9.9	...	...	...
Rwanda	...	0.1	...	...	...	...	...
Senegal	12.2	12.4	28.2	12.8	13.9	12.9	5.3
Seychelles	...	...	...	0.0	0.0	0.1	...
Sierra Leone	...	...	0.0	...	...	...	...
South Africa	1.2	1.3	1.5	1.2	1.4	2.5	1.5
Sudan	0.6	0.5	0.5	1.0	0.9	0.6	...
Swaziland	0.0	0.1	0.0	...	...	...	...
Togo	4.7	1.9	2.0	2.1	3.8	5.9	...
Tunisia	1.9	1.2	1.2	0.6	0.9	0.9	...
Uganda	1.0	0.1	0.0	0.1	0.2	0.1	0.2
United Rep. of Tanzania	15.0	10.7	7.2	6.1	7.1	4.5	3.8
Zambia	1.2	1.4	1.8	3.5	1.0	1.4	...
Zimbabwe	0.7	1.0	0.4	...	0.2	...	...

Source: UN, Comtrade.

Appendix table 5

**Applied duties faced by African products in China, India, the EU and the United States, 2005**

(Weighted MFN tariff average including preferences)

	China a	India b	EU	United States
<b>Major oil exporters</b>				
Algeria	0.0	...	0.0	0.0
Angola	0.0	...	0.0	0.0
Congo	0.0	...	0.0	0.0
Equatorial Guinea	0.0	...	0.0	0.0
Gabon	0.0	...	0.0	0.0
Libyan Arab Jamahiriya	0.0	...	0.0	0.0
Sudan	0.2	15.4	3.1	...
<b>Cotton exporters</b>				
Benin	(36.3)	19.3	6.2	...
Burkina Faso	(40.0)	...	9.0	...
Cameroon	(25.8)	...	5.8	0.0
Côte d'Ivoire	...	19.5	4.3	0.0
Mali	(39.7)	10.4	0.1	...
<b>Other countries</b>				
Central African Republic	4.4	...	0.0	0.0
Chad	4.1	...	0.0	0.0
Congo (Dem)	0.2	...	0.6	0.0
Djibouti	...	13.9	0.3	0.0
Egypt	8.7	...	0.6	4.5
Eritrea	...	12.8	0.2	0.1
Ethiopia	0.0	...	1.7	0.0
Gambia	...	28.2	0.1	...
Ghana	3.0	...	0.2	0.0
Guinea-Bissau	...	29.8	0.3	...
Kenya	...	30.2	0.7	0.0
Madagascar	0.2	...	0.6	0.0
Morocco	5.9	11.3	1.2	2.8
Mozambique	3.2	29.5	0.9	...
Namibia	2.6	...	3.4	0.0
Rwanda	0.0	...	0.1	0.0
Senegal	...	15.4	0.2	...
Sierra Leone	1.1	19.3	0.0	0.0
South Africa	3.2	15.3	1.2	0.0
Tanzania	8.8	23.8	0.0	...
Togo	33.1	8.4	1.8	...
Tunisia	...	12.4	1.5	4.4
Uganda	24.8	...	0.0	0.0
Zambia	4.5	...	8.5	...
Zimbabwe	12.4	...	6.4	0.7

a. China's tariff estimates contain an upward bias for cotton exporters as the data reflect only the high out of quota tariff for cotton and do not include the lower in-quota tariffs.

b. Duties in India refer to the year 2004.

Source: WTO, Tariff Profiles 2006.

Appendix table 6

**Share of China in merchandise imports of African countries, 2000-2006**

(Percentage)

	2000	2001	2002	2003	2004	2005	2006
Algeria	2.3	2.0	2.8	3.8	5.0	...	...
Benin	5.4	8.0	6.4	7.1	6.7	8.8	...
Botswana	0.4	0.4	0.5	0.6	...	...	...
Burkina Faso	3.8	4.6	4.3	1.9	2.4	...	...
Burundi	3.7	4.1	5.0	0.9	3.3	4.2	...
Cameroon	3.0	2.7	3.6	4.0	4.6	5.2	...
Cape Verde	1.4	7.4	1.0	1.1	1.1	1.4	2.0
Central African Rep.	0.8	0.9	1.5	2.5	...	1.8	...
Comoros	0.6	...	...	...	...	...	...
Côte d'Ivoire	2.7	3.0	2.4	3.5	2.8	3.1	4.3
Egypt	4.6	4.1	4.5	4.9	5.1	4.6	...
Eritrea	1.0	1.9	3.6	2.7	...	...	...
Ethiopia	7.7	7.4	9.1	11.7	...	...	...
Gabon	0.7	0.9	...	1.1	1.5	1.8	2.6
Gambia	7.5	6.5	4.3	5.1	12.1	9.3	...
Ghana	3.2	3.9	4.7	5.6	9.0	8.5	9.5
Guinea	4.6	5.4	6.6	...	...	...	...
Kenya	3.5	2.4	2.4	2.5	3.6	...	...
Lesotho	1.6	0.5	3.8	...	...	...	...
Libya	...	...	...	2.0	3.3	...	...
Madagascar	12.4	9.2	5.8	9.8	10.3	...	...
Malawi	2.5	2.7	1.5	2.8	2.7	2.9	2.2
Mali	4.5	2.7	2.4	3.1	4.9	...	...
Mauritania	1.5	1.3	1.5	2.3	1.2	2.1	...
Mauritius	7.6	7.1	8.4	8.4	9.2	9.8	8.6
Morocco	2.3	2.5	2.9	3.4	4.2	5.1	5.4
Mozambique	1.9	2.0	2.0	2.3	2.0	2.6	...
Namibia	0.5	1.1	0.9	1.3	1.2	1.6	...
Niger	6.7	5.6	9.1	9.4	5.2	5.5	...
Nigeria	4.3	6.6	8.5	7.2	...	...	...
Rwanda	...	2.3	2.0	1.9	...	...	...
Sao Tome and Principe	0.1	0.1	0.0	0.1	...	...	...
Senegal	2.7	2.4	2.1	2.7	3.4	3.6	4.3
Seychelles	...	0.3	0.4	0.8	0.8	1.0	...
Sierra Leone	...	...	3.4	...	...	...	...
South Africa	3.7	4.4	5.2	6.4	7.5	9.0	10.0
Sudan	7.1	10.3	10.2	10.7	14.1	18.6	...
Swaziland	0.4	0.5	1.4	...	...	...	...
Togo	2.9	2.8	2.9	4.1	8.3	13.2	...
Tunisia	1.2	1.4	1.5	1.8	2.3	2.9	...
Uganda	3.1	3.6	4.1	5.1	6.2	5.3	5.4
United Rep. of Tanzania	4.1	4.1	4.7	5.3	6.8	7.9	7.0
Zambia	1.1	2.9	2.8	2.7	2.2	3.0	...
Zimbabwe	...	1.2	1.9	...	2.6	...	...
<b>Estimates based on IMF, Direction of Trade Statistics Yearbook 2006</b>							
Congo	0.9	1.3	4.1	2.7	5.2	13.2	...
Djibouti	9.6	8.2	8.1	8.9	8.1	10.5	...
Egypt a	6.2	7.4	7.3	9.0	10.8	9.8	...
Morocco a	2.6	3.0	4.1	5.3	5.7	6.4	...

a. Estimated based on China exports (f.o.b.).

Source: UN, Comtrade and IMF, Direction of Trade Statistics Yearbook 2006.

Appendix table 7

**Share of India in merchandise imports of African countries, 2000-2006**

(Percentage)

	2000	2001	2002	2003	2004	2005	2006
Algeria	0.3	0.4	0.7	1.0	1.2	...	...
Benin	1.6	1.4	1.9	1.7	1.0	1.6	...
Botswana	0.3	0.3	0.3	0.2	...	...	...
Burkina Faso	0.4	1.2	2.4	1.7	0.8	...	...
Burundi	2.8	3.9	4.2	4.2	4.6	4.1	...
Cameroon	0.5	0.6	1.4	1.5	1.1	1.3	...
Cape Verde	0.1	...	0.1	0.0	0.0	0.0	0.0
Central African Rep.	...	...	0.3	0.0	...	0.0	...
Comoros	0.7	...	...	...	...	...	...
Côte d'Ivoire	0.7	0.9	2.8	2.0	1.2	1.4	1.8
Egypt	1.6	2.3	2.9	1.3	1.6	1.5	...
Eritrea	2.0	3.4	3.4	6.3	...	...	...
Ethiopia	5.2	5.0	5.9	6.5	...	...	...
Gabon	0.6	1.2	...	0.5	1.1	0.8	0.8
Gambia	1.5	2.0	2.4	3.5	1.8	4.7	...
Ghana	1.7	2.0	2.6	3.1	3.7	3.7	3.9
Guinea	1.9	1.6	3.1	...	...	...	...
Kenya	4.6	4.3	5.4	5.0	5.8	...	...
Lesotho	0.1	0.0	0.2	...	...	...	...
Libya	...	...	...	0.3	2.6	...	...
Madagascar	1.7	2.1	3.7	4.9	4.3	...	...
Malawi	4.8	5.5	3.8	4.8	6.3	4.7	4.1
Mali	0.5	0.7	3.1	2.9	2.0	...	...
Mauritania	0.1	0.1	0.2	0.3	0.2	0.2	...
Mauritius	8.8	8.0	7.3	8.2	9.1	6.9	13.6
Morocco	0.5	0.6	0.7	1.2	0.7	0.7	0.8
Mozambique	1.7	2.3	5.1	3.9	3.1	2.8	...
Namibia	0.2	0.2	0.4	0.5	0.9	0.5	...
Niger	0.4	0.5	4.1	3.2	1.5	3.9	...
Nigeria	3.4	4.0	3.5	2.5	...	...	...
Rwanda	...	2.3	2.7	3.5	...	...	...
Senegal	1.6	1.2	1.9	2.2	1.4	3.3	3.0
Seychelles	...	1.5	2.4	2.2	2.6	2.0	...
Sierra Leone	...	...	3.8	...	...	...	...
South Africa	0.9	1.0	1.1	1.2	1.5	2.0	2.4
Sudan	4.9	6.1	4.6	5.0	5.1	4.5	...
Swaziland	0.0	0.0	0.0	...	...	...	...
Togo	1.4	1.5	1.2	1.4	1.8	2.4	...
Tunisia	0.5	0.5	0.7	0.8	0.9	0.8	...
Uganda	5.0	6.6	6.7	7.4	7.3	6.4	8.2
United Rep. of Tanzania	5.2	5.0	6.4	7.6	8.6	6.8	5.3
Zambia	1.6	1.8	3.6	2.3	2.4	3.1	...
Zimbabwe	...	0.7	1.3	...	0.6	...	...

Source: UN, Comtrade.

Appendix table 8

**Share of China in manufacture imports of African countries, 2000-2006**

(Percentage)

	2000	2001	2002	2003	2004	2005	2006
Algeria	3.1	2.4	3.5	4.7	6.3	...	...
Benin	9.6	13.1	11.1	13.7	13.0	17.7	...
Botswana	0.6	0.5	0.6	0.7	...	...	...
Burkina Faso	1.7	3.2	3.8	1.6	2.7	...	...
Burundi	5.9	5.7	6.7	1.5	4.4	4.9	...
Cameroon	2.8	2.2	2.7	4.6	6.3	9.8	...
Cape Verde	2.2	12.4	1.3	1.8	1.8	2.1	3.2
Central African Rep.	1.2	1.4	2.5	4.5	...	4.9	...
Comoros	0.8	...	...	...	...	...	...
Côte d'Ivoire	2.2	3.3	3.4	4.9	4.6	5.8	8.7
Egypt	6.3	6.9	8.2	9.2	9.2	9.2	...
Eritrea	1.6	2.8	5.4	4.6	...	...	...
Ethiopia	10.7	10.7	12.1	17.9	...	...	...
Gabon	0.9	1.2	...	1.4	2.1	2.4	3.3
Gambia	9.0	11.7	8.1	8.8	16.6	16.9	...
Ghana	5.0	5.9	6.1	8.4	11.3	10.6	12.3
Guinea	5.7	2.6	4.6	...	...	...	...
Kenya	4.8	3.7	3.5	3.8	5.6	...	...
Lesotho	3.3	0.7	6.0	...	...	...	...
Libya	...	...	...	2.2	3.9	...	...
Madagascar	16.7	13.3	11.9	14.0	15.9	...	...
Malawi	3.4	3.6	2.4	3.8	3.9	4.2	3.1
Mali	4.9	2.7	2.6	3.9	6.3	...	...
Mauritania	0.9	1.8	2.0	3.2	1.1	2.1	...
Mauritius	9.8	9.8	11.9	11.4	13.2	14.4	12.6
Morocco	2.6	3.1	3.5	4.3	5.5	7.3	7.8
Mozambique	2.1	2.8	3.5	3.4	3.4	5.0	...
Namibia	0.4	1.5	0.9	1.8	1.5	1.9	...
Niger	5.9	6.9	10.5	12.6	8.4	8.9	...
Nigeria	5.4	7.8	9.0	9.9	...	...	...
Rwanda	...	3.4	3.0	2.7	...	...	...
Sao Tome and Principe	0.1	0.2	0.0	0.2	...	...	...
Senegal	3.0	3.0	4.3	4.3	5.7	6.9	8.0
Seychelles	...	0.4	0.5	1.2	1.4	1.5	...
Sierra Leone	...	...	8.5	...	...	...	...
South Africa	4.9	6.0	6.9	8.3	10.3	12.4	14.6
Sudan	10.0	13.2	13.3	13.1	16.0	21.1	...
Swaziland	0.6	0.7	2.2	...	...	...	...
Togo	4.2	3.8	4.1	6.2	14.5	24.1	...
Tunisia	1.4	1.6	1.8	2.2	2.9	3.9	...
Uganda	4.8	5.2	6.2	7.5	8.6	7.9	8.5
United Rep. of Tanzania	4.9	5.7	6.6	7.6	10.0	10.3	11.1
Zambia	1.5	3.7	3.6	3.5	2.7	3.6	...
Zimbabwe	...	2.3	2.0	...	4.6	...	...

Source: UN, Comtrade.



Appendix table 9

**Share of India in manufacture imports of African countries, 2000-2006**

(Percentage)

	2000	2001	2002	2003	2004	2005	2006
Algeria	0.3	0.4	0.9	1.3	1.5	...	...
Benin	3.1	1.9	2.1	2.1	1.7	2.4	...
Botswana	0.4	0.4	0.4	0.2	...	...	...
Burkina Faso	0.6	2.1	1.8	0.9	0.7	...	...
Burundi	4.5	5.5	5.9	6.6	6.3	4.9	...
Cameroon	0.7	0.7	1.0	1.3	1.1	1.5	...
Cape Verde	0.1	...	0.1	0.1	0.0	0.1	0.0
Central African Rep.	...	...	0.4	0.0	...	0.0	...
Comoros	0.6	...	...	...	...	...	...
Côte d'Ivoire	1.5	1.6	2.0	2.0	1.9	1.8	2.6
Egypt	1.8	2.8	4.4	2.0	2.6	2.6	...
Eritrea	1.7	3.7	3.6	2.7	...	...	...
Ethiopia	7.0	7.5	7.7	9.2	...	...	...
Gabon	0.1	0.3	...	0.3	0.5	0.3	0.4
Gambia	2.7	4.0	1.9	1.6	1.6	2.0	...
Ghana	2.7	3.6	3.2	4.5	4.7	4.6	5.1
Guinea	3.5	2.4	3.4	...	...	...	...
Kenya	7.1	6.3	7.4	6.8	6.7	...	...
Lesotho	0.2	0.0	0.3	...	...	...	...
Libya	...	...	...	0.2	3.1	...	...
Madagascar	2.6	3.2	4.7	5.2	5.1	...	...
Malawi	6.6	7.8	6.0	6.5	8.4	6.6	5.7
Mali	0.9	1.0	1.4	1.3	1.8	...	...
Mauritania	0.1	0.2	0.4	0.5	0.2	0.3	...
Mauritius	11.3	10.4	9.6	9.9	9.9	7.2	8.3
Morocco	0.7	0.9	1.1	1.0	1.0	1.0	1.2
Mozambique	2.3	4.2	4.5	4.2	4.9	4.9	...
Namibia	0.3	0.3	0.4	0.5	0.6	0.6	...
Niger	0.9	0.5	0.8	1.2	1.5	2.1	...
Nigeria	4.1	5.1	3.9	2.8	...	...	...
Rwanda	...	3.6	4.0	5.0	...	...	...
Senegal	2.4	2.1	1.9	1.5	1.6	3.3	4.0
Seychelles	...	0.7	1.7	2.3	2.7	2.2	...
Sierra Leone	...	...	7.8	...	...	...	...
South Africa	1.1	1.2	1.1	1.3	1.6	2.1	2.5
Sudan	5.7	5.4	5.0	4.4	4.9	4.5	...
Swaziland	0.0	0.0	0.1	...	...	...	...
Togo	2.3	2.5	1.3	1.9	2.7	2.3	...
Tunisia	0.5	0.5	0.7	0.7	0.7	0.8	...
Uganda	7.5	9.5	9.7	10.4	8.9	9.2	11.1
United Rep. of Tanzania	7.9	7.0	8.0	8.2	7.8	8.2	6.5
Zambia	2.3	2.3	4.8	2.9	3.0	3.9	...
Zimbabwe	...	1.4	1.6	...	0.9	...	...

Source: UN, Comtrade.

Appendix table 10

## China's trade, FDI stock and economic cooperation with Africa, 2005-06

(Million dollars)

	Trade		FDI	Foreign	Foreign	Foreign
	Exports	Imports	Stock	Economic	Engineering	Labour
	2006	2006	2005	Cooperation a	Projects	Services
<b>Total Africa</b>	<b>26587</b>	<b>28772</b>	<b>1595</b>	<b>6274</b>	<b>6092</b>	<b>154</b>
<b>Oil exporting countries</b>	<b>8169</b>	<b>21398</b>	<b>727</b>	<b>3897</b>	<b>3834</b>	<b>42</b>
Angola	894	10933	9	306	304	2
Sudan	1410	1943	352	1343	1330	5
Nigeria	2852	278	94	800	774	17
Congo	241	2792	13	116	114	1
Equatorial Guinea	41	2538	17	75	73	2
Libya	704	1694	33	132	128	4
Algeria	1948	143	171	1065	1050	11
Gabon	64	817	35	43	42	1
Chad	14	260	3	18	18	...
<b>South Africa</b>	<b>5768</b>	<b>4085</b>	<b>112</b>	<b>83</b>	<b>80</b>	<b>3</b>
<b>Other countries</b>	<b>12649</b>	<b>3288</b>	<b>756</b>	<b>2294</b>	<b>2179</b>	<b>108</b>
Egypt	2976	217	40	277	277	0
Morocco	1570	359	21	49	46	4
Benin	1452	89	19	2	2	0
Ghana	803	80	7	83	82	1
Togo	704	22	5	13	12	0
Kenya	621	24	58	36	35	1
Ethiopia	431	132	30	183	182	0
United Rep. of Tanzania	383	153	62	212	210	1
Liberia	530	2	16	9	1	8
Mauritania	109	402	2	44	35	9
Dem. Rep. of the Congo	69	369	25	83	83	0
Tunisia	358	51	2	65	61	0
Cameroon	191	200	8	19	17	1
Zambia	103	270	160	33	33	0
Côte d'Ivoire	227	125	29	26	26	0
Zimbabwe	136	139	42	90	89	1
Namibia	133	122	2	36	32	3
Madagascar	223	24	50	30	28	2
Burkina Faso	19	193	...	1	1	...
Mozambique	128	80	15	96	96	...
Mauritius	198	7	27	92	41	51
Senegal	187	9	2	34	33	1
Mali	75	114	13	177	177	0
Guinea	175	12	44	77	75	2
Gambia	162	0	1	14	14	0
Uganda	138	18	5	56	55	1
Djibouti	155	0	0	10	9	1
Niger	72	1	20	19	19	0
Botswana	62	8	18	265	264	1
Lesotho	64	1	1	25	17	8
Sierra Leone	39	1	18	18	16	2
Eritrea	38	1	0	19	19	1
Rwanda	12	22	5	10	9	0
Swaziland	7	25	...	1	...	1
Malawi	31	1	1	4	4	...
Somalia	28	3	...	...	...	...
Burundi	10	2	...	3	2	0
Central African Rep.	2	9	2	24	24	0
Cape Verde	10	0	1	2	2	0
Comoros	6	0	0	5	5	0
Seychelles	5	1	4	22	21	1
Guinea-Bissau	6	0	...	27	26	2
Other Africa, nes	2	1	0	3	1	2

a. Foreign economic cooperation comprises foreign engineering projects, foreign labour services and foreign design consultation services.

Source: UN, Comtrade and China, Trade and External Economic Statistical Yearbook 2006.

Appendix table 11

**Imports of clothing and textiles of the EU and the United States from Africa and selected Asian countries, 2004-06**

(Million dollars and percentage)

	Value			Annual percentage change					
	EU(25)	US	EU and US	EU(25)		United States		EU and US	
	2006	2006	2006	2005	2006	2005	2006	2005	2006
<b>Clothing</b>									
World	79069	82972	162041	7.9	11.2	5.7	3.6	6.7	7.2
Africa	7521	2193	9714	-6.9	4.4	-12.8	2.9	-8.4	4.1
North Africa	6552	823	7376	-5.7	3.4	1.8	40.3	-5.1	6.5
Sub-Saharan Africa	969	1370	2338	-15.4	12.2	-17.3	-11.3	-16.6	-2.9
South Africa	38	53	91	-31.0	-26.3	-52.5	-25.7	-45.4	-26.0
Asia									
China	25489	24403	49892	43.4	10.8	46.9	15.4	45.0	13.0
India	5091	3560	8652	26.8	14.8	32.9	5.5	29.4	10.8
Bangladesh	5762	3121	8883	-4.8	30.9	19.7	23.0	2.9	28.0
Cambodia	692	2271	2963	-8.3	17.0	19.6	24.9	11.3	23.0
<b>Textiles</b>									
World	23554	23498	47052	1.2	10.8	9.1	4.3	5.1	7.4
Africa	992	246	1238	-6.5	5.8	14.9	9.4	-3.0	6.5
North Africa	804	201	1005	-3.1	8.1	20.7	7.4	0.9	7.9
Sub-Saharan Africa	188	46	233	-17.4	-3.0	-6.6	19.0	-15.8	0.7
South Africa	109	41	150	-8.5	-1.9	-4.7	14.8	-7.6	2.2
Asia									
China	5903	6960	12863	24.5	20.8	31.8	14.8	28.4	17.5
India	2691	2269	4960	2.2	9.1	14.0	11.5	7.2	10.2
Bangladesh	275	118	393	1.4	26.7	-3.0	-2.5	-0.2	16.2
Cambodia	2	16	18	188.7	-10.2	5.1	8.2	14.7	5.7

Note: EU imports exclude intra-EU trade.

Source: Eurostat, Comext and UN, Comtrade 2007.