

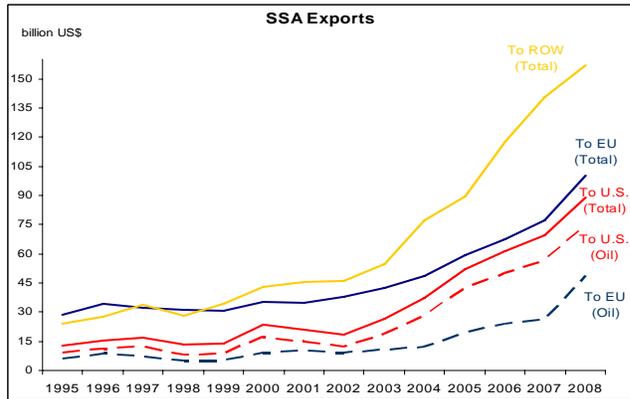
SUB-SAHARAN AFRICA (SSA) EXPORTS DOMINATED BY THE UNITED STATES AND THE EUROPEAN UNION, THOUGH COMPOSITION DIFFERS SUBSTANTIALLY (1995–2008)

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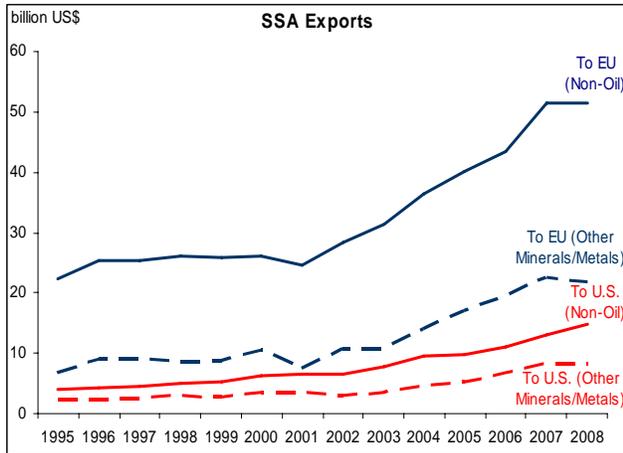
SSA exports to its two dominant markets, the United States (due to size of market and preference programs) and the European Union (due to closer proximity and historical ties), have been driven by different factors. U.S.-bound exports have been dominated by oil, while agricultural products have played a more important role in the European Union.

Driven by oil, the gap between SSA exports to the United States and SSA exports to the European Union has narrowed in recent years

- In 2008, SSA exports to the EU (\$100.1 billion) and the U.S. (\$88.7 billion) accounted for 62% of total SSA exports (33% to the EU and 29% to the U.S.).
- In 2008, 83% of total SSA exports to the U.S were oil exports, having increased from 69% in 1995. In 2008, 49% of total SSA exports to the EU were oil exports, having increased from 22% in 1995.
- Higher oil prices were the principal reason for the boost in SSA exports to the U.S. and the EU. Oil prices grew at a 14% compound annual growth rate (1995 to 2008). The volume of SSA oil exports to both the U.S. and the EU grew approximately 3%.

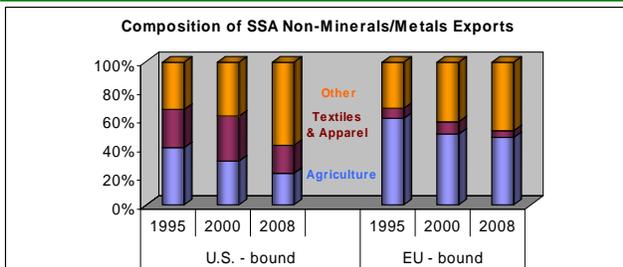


SSA non-oil exports to the European Union have been noticeably higher than to the United States



- Minerals and metals (excl. oil) have played an important role in SSA exports to the U.S. and the EU. In 2008, SSA exports of non-oil minerals and metals accounted for 9% of total SSA exports to the U.S., but 22% of total SSA exports to the EU.
- Principal non-oil products exported by SSA to the U.S. included platinum, diamonds, cocoa beans, jerseys, and sweaters.
- The main non-oil products exported by SSA to the EU included cocoa beans, coffee, catalytic converters, raw sugar, and prepared or preserved tuna (fluctuations in prices of coffee, cocoa beans, gold, and platinum were responsible for the 2001 shift in the growth trend to the EU).

Textiles and apparel were prominent in non-minerals/metals SSA exports to the United States, while agricultural products were a larger component in SSA exports to the European Union



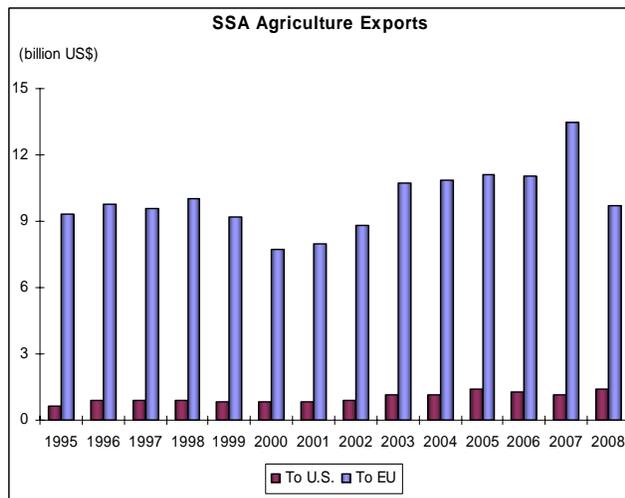
- Agriculture and textiles and apparel represented 22% and 20%, respectively, of SSA non-mineral/metals exports to the U.S. in 2008; and 1.6% and 1.4%, respectively, of total SSA exports to the U.S.
- In 2008, SSA exports of agriculture and textiles and apparel represented 47% and 5%, respectively, of non-mineral/metals exports to the EU; and 14% and 1.4%, respectively, of total SSA exports to the EU.

Following AGOA's 2000 implementation, U.S.-bound SSA exports spiked until the termination of the Multi-Fiber Agreement, and are now roughly in line with those headed towards the EU



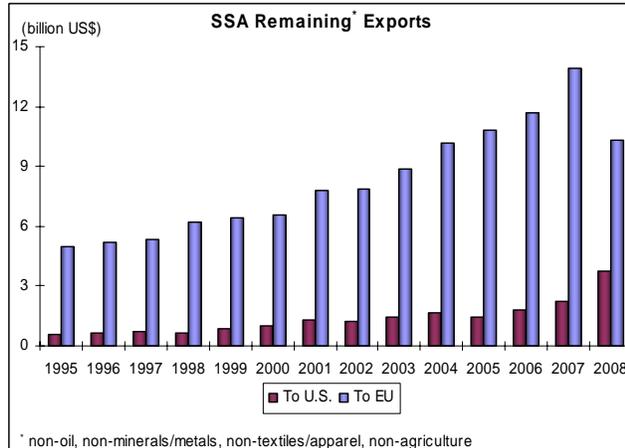
- The leading SSA textiles and apparel exports to the U.S. and the EU are men's shirts, men's trousers, sweaters, t-shirts, women's trousers (primarily to the U.S.), and wool tops.
- Over the 1995–2008 period, the major SSA textile and apparel exporters to the U.S. were Lesotho, Madagascar, Kenya, Swaziland, and Mauritius.
- The major SSA textile and apparel exporters to the EU were Mauritius, Madagascar, South Africa, Chad, and Zimbabwe, over this same period.
- Multi-Fiber Agreement quotas expired at the end of 2004, which reversed the growth of SSA exports to the U.S.

SSA agricultural exports to the United States are markedly lower than to the European Union (due, in part, to the closer proximity of Europe to SSA)



- Cocoa beans, coffee, vanilla beans, tobacco, and cane sugar are the leading SSA agricultural exports to the U.S. In 2008, cocoa beans represented 45% of SSA agricultural exports to the U.S. (with Côte d'Ivoire as the principal SSA exporter).
- The principal SSA agricultural exports to the EU include cocoa beans, coffee, cane sugar, tobacco, bananas and plantains, and grapes. In 2008, cocoa beans represented 24% of SSA agricultural exports to the EU; Côte d'Ivoire and Ghana have been the largest SSA exporters of cocoa to the EU.
- The top SSA agricultural exporters to the U.S. and EU are Côte d'Ivoire, Ghana, Kenya, South Africa, Cameroon (primarily to EU), and Ethiopia (primarily to U.S.).

While remaining (non-oil, non-minerals/metals, non-textiles/apparel, non-agriculture) SSA exports to the United States have grown, they are still markedly lower than to the European Union



- Leading exports to the U.S. in this category are automobiles, catalytic converters, rubber, wood pulp, raw hides and skins, and leather.
- Leading exports to the EU in this category are catalytic converters, wood, fish and crustaceans, furniture, and automobiles.
- Major SSA exporters of these products to the U.S. and EU included Cameroon, Côte d'Ivoire, Liberia, South Africa, Ghana (primarily to U.S.), and Nigeria (primarily to EU).
- In 2008, exports from South Africa accounted for 81% of total SSA exports in this category to the U.S., and 59% to the EU.