

# Taking SACU Export Products beyond borders - Tapping into the AfCFTA Market and Beyond

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SACU Investment Roundtable



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# 1. INTRODUCTION

- Exports can act as an engine of **growth and stability** for the SACU region.
- Broadly, the Export Promotion portion of the technical committee aims to provide support through the following channels:
  - Helping exporters connect with **new opportunities**
  - Offering **export promotion services**
  - Helping exporters adapt to the new reality of the **African Continental Free Trade Agreement (AfCFTA)**
- As a first step in offering this support, the committee undertook a **export scoping exercise** to identify key global opportunities in the following value chains:
  - Leather and leather products
  - Fruit and vegetable products
  - Meat and meat products
  - Textile and clothing
  - Essential oils and cosmetics

## 2. SCOPING

- The export scoping exercise considers three factors:
  - **Competitiveness:** Where do our current and emerging competitive strengths lie?
  - **Opportunity:** Where do current and emerging markets opportunities lie, and where do we have good compatibility with those markets?
  - **Access:** Which markets do we have the best access to, considering barriers like tariffs and logistics costs?
- The scoping exercise considers all three factors, and tries to create a **balanced assessment** of where realistic opportunities lie
- In addition to the formal scoping, consideration was also given amongst others to **current industry capability** and **government priorities**.
- ***Disclaimer:*** *These opportunities primarily consider trade and economic data, but not the specific standards and technical considerations of the value chain.*

### 3. STRATEGIC OPPORTUNITIES

- The SACU ESE model currently assesses 3 898 048 distinct opportunities, and features market coverage comparable to 99.5% of SACU's exports.
- The scoping exercise identified **six markets** and **seven products** that have the best strategic potential.
- Markets and rationale:
  - **France:** SACU's largest export market for leather products, fruits, and essential oils products.
  - **Germany:** Traditional market for fruits exports as well as an emerging market for essential oils.
  - Markets such as **Zambia, Zimbabwe, Malawi** and **Egypt** offer good export opportunities and market access for products within the fruit, meat and essential oils value chains.

## 4. STRATEGIC OPPORTUNITIES

- Products and rationale:
  - **Handbags** (leather and leather products) - SACU's largest global export with strong demand and market access.
  - **Fresh or dried oranges and fresh apples** (fruit and vegetables) - Both are among SACU's largest exports, with strong competitiveness globally.
  - **Frozen, boneless meat of bovine animals** (meat and meat products) - SACU's largest meat export offering with good export opportunities and excellent market access.
  - **Women's or girls' trousers, bib and brace overalls, breeches and shorts** (textile and clothing) - A traditional area of strength in SACU, with strong market access.
  - **Mixtures of odoriferous substances** (essential oils and cosmetics): Consistently ranks as the best opportunity the AfCFTA market and beyond.

## 5. LEATHER AND LEATHER PRODUCTS - AfCFTA

Competitiveness	Opportunity	Access	Overall Compatibility
<i>Segments suited to our export strengths</i>	<i>Segments with good import opportunities</i>	<i>Segments we have good access to</i>	<i>Top Segments considering all factors</i>
Footwear	Footwear	Leather apparel	Footwear
Leather products	Leather products	Leather products	Leather products
Leather & animal hides	Leather apparel	Footwear	Leather apparel
Leather apparel	Leather & animal hides	Leather & animal hides	Leather & animal hides

- Overall compatibility shows that **footwear** ranks as the best opportunity when weighting for competitiveness and opportunity, whereas **leather apparel** ranks as the best opportunity when weighting for market access.

## 6. LEATHER AND LEATHER PRODUCTS - BEYOND AfCFTA

Competitiveness	Opportunity	Access	Overall Compatibility
<i>Segments suited to our export strengths</i>	<i>Segments with good import opportunities</i>	<i>Segments we have good access to</i>	<i>Top Segments considering all factors</i>
Leather & animal hides	Footwear	Leather apparel	Footwear
Footwear	Leather products	Leather products	Leather products
Leather products	Leather apparel	Footwear	Leather apparel
Leather apparel	Leather & animal hides	Leather & animal hides	Leather & animal hides

- **Leather and animal hides** ranks high when weighting for competitiveness, whereas footwear ranks high when weighting for opportunity, and leather apparel ranks high when weighting for market access.
- However, overall compatibility shows that **footwear and leather products** offer the best opportunity for SACU in the rest of the world.



## 7. TOP PRODUCTS - AfCFTA

<b>Competitiveness</b>	<b>Opportunity</b>	<b>Access</b>	<b>Balanced</b>
<i>Products suited to our export strengths</i>	<i>Products with good import opportunities</i>	<i>Products we have good access to</i>	<i>Top Products considering all factors</i>
Articles of leather or composition leather	Trunks, suitcases, vanity cases, executive-cases, briefcases, school satchels and similar containers	Travelling-bags, shopping or tool bags, jewellery boxes, cutlery cases and similar	Articles of leather or composition leather
Articles of gut, goldbeater's skin, bladders or tendons	Handbags	Handbags	Handbags
Travelling-bags, shopping or tool bags, jewellery boxes, cutlery cases and similar	Travelling-bags, shopping or tool bags, jewellery boxes, cutlery cases and similar	Trunks, suitcases, vanity cases, executive-cases, briefcases, school satchels and similar containers	Travelling-bags, shopping or tool bags, jewellery boxes, cutlery cases and similar
Saddlery and harness for any animal	Belts and bandoliers, of leather or composition leather	Gloves, mittens and mitts, of leather or composition leather (excl. special sports gloves)	Trunks, suitcases, vanity cases, executive-cases, briefcases, school satchels and similar containers
Handbags	Gloves, mittens and mitts, of leather or composition leather	Belts and bandoliers, of leather or composition leather	Articles of gut, goldbeater's skin, bladders or tendons
Clothing accessories of leather or composition leather excl. gloves, mittens and mitts, belts, bandoliers, footwear and headgear and parts thereof	Articles of leather or composition leather	Articles of apparel, of leather or composition leather excl. clothing accessories, footwear and headgear and parts thereof	Gloves, mittens and mitts, of leather or composition leather (excl. special sports gloves)
Gloves, mittens and mitts, of leather or composition leather (excl. special sports gloves)	Wallets, purses, key-cases, cigarette-cases, tobacco-pouches and similar articles of a kind normally carried in the pocket or handbag	Gloves, mittens and mitts, of leather or composition leather (excl. special sports gloves)	Wallets, purses, key-cases, cigarette-cases, tobacco-pouches and similar articles of a kind normally carried in the pocket or handbag
Trunks, suitcases, vanity cases, executive-cases, briefcases, school satchels and similar containers	Clothing accessories of leather or composition leather (excl. gloves, mittens and mitts, belts, bandoliers, footwear and headgear and parts thereof)	Trunks, suitcases, vanity cases, executive-cases, briefcases, school satchels and similar containers	Clothing accessories of leather or composition leather (excl. gloves, mittens and mitts, belts, bandoliers, footwear and headgear and parts thereof)

## 8. TOP PRODUCTS - BEYOND AfCFTA

<b>Competitiveness</b> <i>Products suited to our export strengths</i>	<b>Opportunity</b> <i>Products with good import opportunities</i>	<b>Access</b> <i>Products we have good access to</i>	<b>Balanced</b> <i>Top Products considering all factors</i>
Articles of apparel, of leather or composition leather	Articles of gut, goldbeater's skin, bladders or tendons	Articles of gut, goldbeater's skin, bladders or tendons	Trunks, suitcases, vanity cases, executive-cases, briefcases, school satchels and similar containers
Travelling-bags, insulated food or beverage bags, toilet bags, rucksacks, shopping-bags, map-cases, tool bags, sports bags, jewellery boxes, cutlery cases, binocular cases, camera cases, musical instrument cases, gun cases, holsters and similar containers	Clothing accessories of leather or composition leather excl. gloves, mittens and mitts, belts, bandoliers, footwear and headgear and parts thereof	Clothing accessories of leather or composition leather excl. gloves, mittens and mitts, belts, bandoliers, footwear and headgear and parts thereof	Articles of leather or composition leather
Trunks, suitcases, vanity cases, executive-cases, briefcases, school satchels and similar containers	Saddlery and harness for any animal, incl. traces, leads, knee pads, muzzles, saddle cloths, saddlebags, dog coats and the like, of any material	Articles of apparel, of leather or composition leather	Travelling-bags, insulated food or beverage bags, toilet bags, rucksacks, shopping-bags, map-cases, tool bags, sports bags, jewellery boxes, cutlery cases, binocular cases, camera cases, musical instrument cases, gun cases, holsters and similar containers,
Handbags	Trunks, suitcases, vanity cases, executive-cases, briefcases, school satchels and similar containers	Trunks, suitcases, vanity cases, executive-cases, briefcases, school satchels and similar containers	Handbags
Articles of gut, goldbeater's skin, bladders or tendons	Travelling-bags, insulated food or beverage bags, toilet bags, rucksacks, shopping-bags, map-cases, tool bags, sports bags, jewellery boxes, cutlery cases, binocular cases, camera cases, musical instrument cases, gun cases, holsters and similar containers	Handbags	Travelling-bags, shopping or tool bags, jewellery boxes, cutlery cases and similar
Clothing accessories of leather or composition leather excl. gloves, mittens and mitts, belts, bandoliers, footwear and headgear and parts thereof	Articles of apparel, of leather or composition leather	Articles of leather or composition leather	Saddlery and harness for any animal

## 9. TOP MARKETS - AfCFTA

Leather hides	Leather products	Leather apparel	Footwear	Leather value chain
Zimbabwe	Mauritius	Zambia	Zambia	Zambia
Zambia	Ghana	Malawi	Malawi	Zimbabwe
Malawi	Zambia	Zimbabwe	Zimbabwe	Malawi
Mozambique	Malawi	Mauritius	Angola	Mauritius
Madagascar	Angola	Ghana	Mauritius	Ghana
Mauritius	Zimbabwe	Mozambique	Ghana	Mozambique
Morocco	Morocco	Uganda	Mozambique	Uganda
Nigeria	Kenya	Angola	Kenya	Angola
Tunisia	Mozambique	Kenya	Uganda	Kenya
Ghana	Uganda	Madagascar	Rwanda	Nigeria
Angola	Seychelles	Nigeria	Madagascar	Madagascar
Uganda	Madagascar	Seychelles	Nigeria	Seychelles
Congo	Rwanda	Sierra Leone	Seychelles	Sierra Leone
Ethiopia	Nigeria	Cameroon	Morocco	Cameroon
Kenya	Cameroon	Rwanda	Cameroon	Rwanda
Egypt	Congo	Burkina Faso	Egypt	Burkina Faso
Rwanda	Sierra Leone	Guinea	Ethiopia	Guinea
United Rep. of Tanzania	Gabon	Congo	Congo	Congo
Central African Rep.	Ivory Coast	Ethiopia	United Rep. of Tanzania	Senegal
Cameroon	United Rep. of Tanzania	Senegal	Algeria	Mali

## 10. TOP MARKETS - BEYOND AfCFTA

Leather hides	Leather products	Leather apparel	Footwear	Leather Value Chain
China	France	France	United Kingdom	China
India	United Kingdom	United Kingdom	France	France
France	China	Netherlands	China	India
United Kingdom	Singapore	Italy	Germany	United Kingdom
Germany	Germany	Germany	Netherlands	Germany
Italy	Netherlands	China	Italy	Netherlands
Netherlands	India	Spain	United Arab Emirates	Italy
Spain	Italy	Belgium	Spain	United Arab Emirates
Belgium	Spain	India	Belgium	Spain
China, Hong Kong SAR	Belgium	Switzerland	India	Belgium
Japan	Japan	United Arab Emirates	Switzerland	Singapore
Singapore	Switzerland	Canada	Singapore	Poland
Switzerland	United Arab Emirates	Poland	Poland	Japan
Rep. of Korea	Canada	Singapore	Japan	Canada
Portugal	Poland	Austria	Canada	Switzerland
Poland	Rep. of Korea	Australia	Austria	China, Hong Kong SAR
Austria	Austria	Sweden	China, Hong Kong SAR	Rep. of Korea
Australia	Thailand	China Hong Kong SAR	Portugal	Austria
Thailand	China, Hong Kong SAR	Denmark	Sweden	Australia
Hungary	Sweden	Portugal	Rep. of Korea	Portugal

# 11. FIRM OPPORTUNITIES

Firm-Segment opportunity matrix		Value chain segment			
		Leather hides	Leather products	Leather apparel	Footwear
Firm segment	Best markets for small firms and new exporters	China, India, France	United Kingdom, Singapore, China	United Kingdom, France, Zambia	United Kingdom, Zambia, Zimbabwe
	Best markets for large, established exporters	China, Italy, France	France, United Kingdom, Singapore	France, United Kingdom, Italy	United Kingdom, France, Italy
	Best markets for quick-wins	China, India, France	Singapore, South Korea, France	Hong Kong, France, Italy	Qatar, UAE, United Kingdom
	Best markets in Africa	Nigeria, Egypt, Tunisia	Ghana, Mauritius, Zambia	Ghana, Mauritius, Mozambique	Zambia, Mozambique, Angola

## 12. FRUITS AND VEGETABLES - AfCFTA

Competitiveness	Opportunity	Access	Overall Compatibility
<i>Segments suited to our export strengths</i>	<i>Segments with good import opportunities</i>	<i>Segments we have good access to</i>	<i>Top Segments considering all factors</i>
Other fruit & veg products	Other fruit & veg products	Other fruit & veg products	Other fruit & veg products
Berries	Apples & pears	Apples & pears	Apples & pears
Apples & pears	Staples & their derivatives	Citrus	Staples & their derivatives
Staples & their derivatives	Sugar	Staples & their derivatives	Berries
Fruit juice	Berries	Grapes	Grapes
Grapes	Grapes	Sugar	Sugar

- **Other fruit and vegetables products** consistently rank as the best opportunity in the region.
- **Berries** feature more prominently when considering competitiveness, whereas **apples and pears** feature prominently when considering demand and market access.
- There are significant opportunities for value added products like **fruit juice** and **sugar**.

# 13. FRUITS AND VEGETABLES - BEYOND AfCFTA

Competitiveness	Opportunity	Access	Overall Compatibility
<i>Segments suited to our export strengths</i>	<i>Segments with good import opportunities</i>	<i>Segments we have good access to</i>	<i>Top Segments considering all factors</i>
Grapes	Grapes	Grapes	Grapes
Citrus	Other processed food	Other processed food	Other processed food
Other fruit	Other fruit	Other fruit	Citrus
Other processed food	Soups & sauces	Soups & sauces	Other fruit
Apples & pears	Sweets and chocolates	Citrus	Soups & sauces
Berries	Citrus	Sweets and chocolates	Apples & pears

- **Grapes** consistently ranks as the best opportunity in the region.
- **Citrus fruits** feature more prominently when considering competitiveness.
- Segments of vegetable products show a lower ranking than fruit products, but processed vegetable products such as **other processed food, soups and sauces** show significant opportunities when weighting for demand and access.
- The region can leverage existing strengths to move into advanced value addition in products like **fruit juice** and **fruit preserves**. Support to emerging products should focus on commodities like cranberries and macadamia nuts.

## 14. TOP PRODUCTS - AfCFTA

<b>Competitiveness</b>	<b>Opportunity</b>	<b>Access</b>	<b>Balanced</b>
<i>Products suited to our export strengths</i>	<i>Products with good import opportunities</i>	<i>Products we have good access to</i>	<i>Top Products considering all factors</i>
Cotton linters	Broken rice	Cotton linters	<b>Cotton linters</b>
Fresh cranberries, bilberries and other fruits of the genus Vaccinium	Fresh pears	Fresh cranberries, bilberries and other fruits of the genus Vaccinium	<b>Fresh cranberries, bilberries and other fruits of the genus Vaccinium</b>
Groats and meal of maize "corn"	Mixtures of fruit juices, incl. grape must, and vegetable juices	Fresh apples	<b>Mixtures of fruit juices, incl. grape must, and vegetable juices</b>
Fresh or dried macadamia nuts, in shell	Palm oil and its fractions	Mixtures of fruit juices, incl. grape must, and vegetable juices	<b>Groats and meal of maize "corn"</b>
Fresh apples	Soya-bean oil and its fractions, whether or not refined (excluding chemically modified and crude)	Groats and meal of maize "corn"	<b>Fresh apples</b>
Mixtures of fruit juices, incl. grape must, and vegetable juices	Food preparations, n.e.s.	Potatoes, uncooked or cooked by steaming or by boiling in water, frozen	<b>Fresh or dried macadamia nuts, in shell</b>
Potatoes, uncooked or cooked by steaming or by boiling in water, frozen	Cane or beet sugar and chemically pure sucrose, in solid form	Fresh or dried macadamia nuts, in shell	<b>Potatoes, uncooked or cooked by steaming or by boiling in water, frozen</b>
Fresh or dried oranges	Cotton linters	Fresh or dried oranges	<b>Fresh or dried oranges</b>
Fresh grapes	Potatoes, uncooked or cooked by steaming or by boiling in water, frozen	Fresh grapes	<b>Fresh grapes</b>
Roasted chicory and other roasted coffee substitutes, and extracts, essences and concentrates thereof	Fresh or dried macadamia nuts, in shell	Crude soya-bean oil, whether or not degummed	<b>Crude soya-bean oil, whether or not degummed</b>



## 15. TOP PRODUCTS - BEYOND AfCFTA

Competitiveness	Opportunity	Access	Balanced
<i>Products suited to our export strengths</i>	<i>Products with good import opportunities</i>	<i>Products we have good access to</i>	<i>Top Products considering all factors</i>
Fresh cranberries, bilberries and other fruits of the genus Vaccinium	Fresh apples	Fresh apples	Fresh cranberries, bilberries and other fruits of the genus Vaccinium
Bran, sharps and other residues of maize "corn"	Fresh or dried oranges	Fresh cranberries, bilberries and other fruits of the genus Vaccinium	Fresh apples
Fresh apples	Fresh grapes	Fresh or dried oranges	Bran, sharps and other residues of maize "corn"
Grapefruit juice, unfermented	Fresh cranberries, bilberries and other fruits of the genus Vaccinium	Fresh grapes	Fresh or dried oranges
Fruit stones and kernels and other vegetable products	Preparations for sauces and prepared sauces; mixed condiments and seasonings	Dried grapes	Fresh grapes
Fresh or dried oranges	Food preparations, n.e.s.	Fresh pears	Dried grapes
Seeds, fruits and spores, for sowing	Maize (excluding seed for sowing)	Mixtures of fruit juices	Fresh pears
Dried grapes	Fresh or dried lemons and limes	Fresh or dried lemons and limes	Fresh or dried lemons and limes
Groats and meal of maize "corn"	Fresh pears	Preparations for sauces and prepared sauces; mixed condiments and seasonings	Mixtures of fruit juices
Fresh or dried lemons and limes	Mixtures of fruit juices	Food preparations, n.e.s.	Fruit stones and kernels and other vegetable products

## 16. TOP MARKETS - AfCFTA

Other fruit & veg	Apples & pears	Staples & their derivatives	Berries	Grapes	Fruit & vegetables value chain
Zambia	Zambia	Malawi	Zambia	Zambia	Zambia
Zimbabwe	Malawi	Ghana	Zimbabwe	Malawi	Zimbabwe
Malawi	Ghana	Angola	Malawi	Mauritius	Malawi
Mozambique	Mauritius	Mauritius	Mauritius	Zimbabwe	Mauritius
Ghana	Morocco	Zimbabwe	Ghana	Angola	Mozambique
Madagascar	Zimbabwe	Zambia	Angola	Ghana	Angola
Angola	Kenya	Mozambique	Kenya	Algeria	Ghana
Uganda	Angola	Nigeria	Mozambique	Kenya	Madagascar
Mauritius	Nigeria	Rwanda	Uganda	Uganda	Kenya
Rwanda	Cameroon	Kenya	Seychelles	Morocco	Seychelles
Congo Rep.	Mozambique	Burkina Faso	Madagascar	Seychelles	Nigeria
Nigeria	Rwanda	Sierra Leone	Congo Rep.	Nigeria	Uganda
Sudan	Uganda	Uganda	Nigeria	Mozambique	Rwanda
Egypt	Senegal	Mali	Rwanda	Gabon	Congo
Senegal	Guinea	Cameroon	Morocco	Rwanda	Morocco
Kenya	Seychelles	Madagascar	United Rep. of Tanzania	Senegal	Egypt
Morocco	Burkina Faso	Seychelles	Ethiopia	Sudan	United Rep. of Tanzania
Seychelles	Liberia	Congo Rep.	Cameroon	Madagascar	Cameroon
United Rep. of Tanzania	Sierra Leone	Senegal	Central African Rep.	Cameroon	Ethiopia
Central African Rep.	Gabon	Morocco	Egypt	Burkina Faso	Burkina Faso

## 17. TOP MARKETS - BEYOND AfCFTA

Grapes	Other processed food	Citrus	Soups & Sauces	Apples & pears	Fruit Value Chain
United Kingdom	China	United Kingdom	United Kingdom	United Kingdom	<b>United Kingdom</b>
United Arab Emirates	India	Netherlands	France	China	<b>China</b>
Netherlands	United Kingdom	France	Netherlands	Germany	<b>Netherlands</b>
China	Netherlands	Germany	Germany	Netherlands	<b>France</b>
Germany	Spain	China	Singapore	France	<b>Germany</b>
India	Germany	India	Belgium	India	<b>India</b>
Japan	Singapore	Canada	Canada	Singapore	<b>Belgium</b>
France	France	Belgium	Spain	Spain	<b>Italy</b>
Spain	United Arab Emirates	Italy	Italy	Belgium	<b>Spain</b>
Canada	Canada	UAE	China	Italy	<b>Japan</b>
Sweden	Belgium	Spain	United Arab Emirates	United Arab Emirates	<b>Canada</b>
Singapore	Italy	Switzerland	India	Canada	<b>Switzerland</b>
Australia	Switzerland	Japan	Switzerland	China Hong Kong SAR	<b>Singapore</b>
Malaysia	Australia	Singapore	Japan	Thailand	<b>Poland</b>
Italy	Japan	Russian Federation	Austria	Malaysia	<b>United Arab Emirates</b>
Poland	Austria	Austria	Sweden	Switzerland	<b>China, Hong Kong SAR</b>
Switzerland	Poland	Saudi Arabia	Australia	Russian Federation	<b>Austria</b>
Russian Federation	Portugal	China Hong Kong SAR	Poland	Indonesia	<b>Rep. of Korea</b>
Switzerland	Romania	Poland	Portugal	Austria	<b>USA</b>
Thailand	Sweden	Qatar	Russian Federation	Romania	<b>Thailand</b>

## 18. FIRM OPPORTUNITIES (FRUITS)

Firm-Segment opportunity matrix		Value chain segment			
		Grapes	Apples & pears	Berries	Citrus
Firm segment	Best markets for small firms and new exporters	United Kingdom, India, Zambia	Zambia, Malawi, China	United Kingdom, Germany, Zambia	United Kingdom, Zambia, Malawi
	Best markets for large, established exporters	United Kingdom, United Arab Emirates, Netherlands	China, United Kingdom, Zambia	Germany, Netherlands, United Kingdom	United Kingdom, Netherlands, Mauritius
	Best markets for quick-wins	United Kingdom, United Arab Emirates, Zambia	China, United Kingdom, Zambia	United Kingdom, Germany, Netherlands	United Kingdom, Netherlands, France
	Best markets in Africa	Zambia, Mauritius, Malawi	Zambia, Malawi, Zimbabwe	Zambia, Zimbabwe, Malawi	Zambia, Mauritius, Malawi

## 19. FIRM OPPORTUNITIES (VEGETABLES)

Firm-Segment opportunity matrix		Value chain segment			
		Staples & their derivatives	Other processed food	Other fruit & vegetables	Soups & sauces
Firm segment	Best markets for small firms and new exporters	Zambia, Zimbabwe, Malawi	Malawi, Zambia, Zimbabwe	Zambia, Zimbabwe, India	United Kingdom, Zambia, Zimbabwe
	Best markets for large, established exporters	Netherlands, United Kingdom, Germany	China, India, Netherlands	China, India, France	United Kingdom, France, Netherlands
	Best markets for quick-wins	United Kingdom, Netherlands, China	China, India, United Kingdom	China, India, Zambia	United Kingdom, France, Netherlands
	Best markets in Africa	Zambia, Zimbabwe, Malawi	Malawi, Zambia, Zimbabwe	Zambia, Zimbabwe, Malawi	Zambia, Malawi, Zimbabwe

## 20. MEATS AND MEAT PRODUCTS - AfCFTA

Competitiveness	Opportunity	Access	Overall Compatibility
<i>Segments suited to our export strengths</i>	<i>Segments with good import opportunities</i>	<i>Segments we have good access to</i>	<i>Top Segments considering all factors</i>
Poultry	Beef	Beef	Beef
Beef	Poultry	Poultry	Poultry
Prepared meat products	Prepared meat products	Prepared meat products	Prepared meat products
Pork	Pork	Pork	Pork
Lamb	Lamb	Lamb	Lamb
Meat products	Meat products	Meat products	Meat products

- Compared to pork and lamb, **beef** offers the best opportunity when weighting for demand and market access, whereas **poultry** offers the best opportunity when weighting for competitiveness.

## 21. MEAT AND MEAT PRODUCTS - BEYOND AfCFTA

Competitiveness	Opportunity	Access	Overall Compatibility
<i>Segments suited to our export strengths</i>	<i>Segments with good import opportunities</i>	<i>Segments we have good access to</i>	<i>Top Segments considering all factors</i>
Prepared meat products	Prepared meat products	Prepared meat products	Prepared meat products
Pork	Pork	Pork	Pork
Beef	Beef	Beef	Beef
Lamb	Lamb	Lamb	Lamb
Poultry	Poultry	Poultry	Poultry
Meat products	Meat products	Meat products	Meat products

- The most significant opportunity lies in **prepared meat products**.
- **Pork is a relatively small segment** when compared to poultry and beef, however findings from the ESE assessment indicate the emergence of the segment due to **increasing global demand for pork imports** and growth of the sector in recent years.

## 22. TOP PRODUCTS - AfCFTA

<b>Competitiveness</b>	<b>Opportunity</b>	<b>Access</b>	<b>Balanced</b>
<i>Products suited to our export strengths</i>	<i>Products with good import opportunities</i>	<i>Products we have good access to</i>	<i>Top Products considering all factors</i>
Fresh or chilled cuts and edible offal of domestic geese (excluding fatty livers)	Frozen, boneless meat of bovine animals	Fresh or chilled cuts and edible offal of domestic geese (excluding fatty livers)	Fresh or chilled cuts and edible offal of domestic geese (excluding fatty livers)
Frozen bovine carcasses and half-carcasses	Sausages and similar products, of meat, offal or blood; food preparations based on these products	Frozen bovine carcasses and half-carcasses	Frozen bovine cuts, with bone in (excluding carcasses and half-carcasses)
Prepared or preserved meat, offal or blood	Frozen bovine cuts, with bone in (excluding carcasses and half-carcasses)	Prepared or preserved meat, offal or blood	Frozen, boneless meat of bovine animals
Frozen bovine cuts, with bone in (excluding carcasses and half-carcasses)	Frozen boneless cuts of sheep	Fresh or chilled carcasses and half-carcasses of swine	Frozen bovine carcasses and half-carcasses
Fresh or chilled carcasses and half-carcasses of swine	Meat of bovine animals, salted, in brine, dried or smoked	Frozen, boneless meat of bovine animals	Prepared or preserved meat, offal or blood
Frozen, boneless meat of bovine animals	Frozen fowls of the species Gallus domesticus, not cut in pieces	Fresh or chilled carcasses and half-carcasses of swine	Fresh or chilled carcasses and half-carcasses of swine
Fresh or chilled sheep carcasses and half-carcasses (excluding lambs)	Fresh or chilled carcasses and half-carcasses of swine	Meat and edible offal, salted, in brine, dried or smoked, and edible flours and meals of meat and meat offal, of primates	Sausages and similar products, of meat, offal or blood; food preparations based on these products
Meat and edible offal, salted, in brine, dried or smoked, and edible flours and meals of meat and meat offal, of primates	Fresh or chilled cuts and edible offal of domestic geese (excluding fatty livers)	Frozen bovine cuts, with bone in (excluding carcasses and half-carcasses)	Meat of bovine animals, salted, in brine, dried or smoked
Meat of bovine animals, salted, in brine, dried or smoked	Frozen bovine carcasses and half-carcasses	Sausages and similar products, of meat, offal or blood; food preparations based on these products	Frozen fowls of the species Gallus domesticus, not cut in pieces
Sausages and similar products, of meat, offal or blood; food preparations based on these products	Prepared or preserved meat, offal or blood	Fresh or chilled sheep carcasses and half-carcasses (excluding lambs)	Meat and edible offal, salted, in brine, dried or smoked, and edible flours and meals of meat and meat offal, of primates



## 23. TOP PRODUCTS – BEYOND AfCFTA

Competitiveness	Opportunity	Access	Balanced
<i>Products suited to our export strengths</i>	<i>Products with good import opportunities</i>	<i>Products we have good access to</i>	<i>Top Products considering all factors</i>
Fresh or chilled cuts and edible offal of domestic geese	Frozen, boneless meat of bovine animals	Frozen, boneless meat of bovine animals	<b>Prepared or preserved meat, of offal or blood (other)</b>
Prepared or preserved meat, of offal or blood (other)	Fresh or chilled bovine meat, boneless	Prepared or preserved meat, offal or blood (other)	<b>Frozen bovine cuts, with bone in</b>
Frozen bovine carcasses and half-carcasses	Frozen cuts and edible offal of fowls of the species Gallus domesticus	Frozen bovine cuts, with bone in	<b>Frozen, boneless meat of bovine animals</b>
Frozen bovine cuts, with bone in	Frozen bovine cuts, with bone in	Fresh or chilled cuts and edible offal of domestic geese	<b>Fresh or chilled cuts and edible offal of domestic geese</b>
Fresh or chilled carcasses and half-carcasses of swine	Frozen meat of swine	Fresh or chilled bovine meat, boneless	<b>Frozen bovine carcasses and half-carcasses</b>
Fresh, chilled or frozen meat and edible offal of game	Prepared or preserved meat, offal or blood (other)	Frozen bovine carcasses and half-carcasses	<b>Fresh or chilled carcasses and half-carcasses of swine</b>
Fresh, chilled or frozen meat and edible offal of primates	Sausages and similar products, of meat, offal or blood	Fresh or chilled carcasses and half-carcasses of swine	<b>Fresh or chilled bovine meat, boneless</b>
Fresh, chilled or frozen meat and edible offal of reptiles	Fresh or chilled carcasses and half-carcasses of swine	Fresh, chilled or frozen meat and edible offal of game	<b>Fresh, chilled or frozen meat and edible offal of game</b>
Frozen, boneless meat of bovine animals	Meat or offal of fowls of the species “Gallus domesticus”, prepared or preserved	Frozen cuts and edible offal of fowls of the species Gallus domesticus	<b>Frozen meat of swine</b>
Frozen or chilled sheep carcasses and half-carcasses (excl. lambs)	Fresh or chilled cuts and edible offal of domestic geese	Frozen meat of swine	<b>Frozen cuts and edible offal of fowls of the species Gallus domesticus</b>

## 24. TOP MARKETS - AfCFTA

Beef	Poultry	Prepared meat products	Pork	Meat and meat products value chain
Angola	Zimbabwe	Zimbabwe	Zimbabwe	Zambia
Mauritius	Zambia	Malawi	Zambia	Zimbabwe
Zambia	Malawi	Zambia	Malawi	Malawi
Zimbabwe	Angola	Mauritius	Mozambique	Mozambique
Malawi	Ghana	Angola	Angola	Angola
Ghana	Mozambique	Ghana	Seychelles	Ghana
Seychelles	Nigeria	Nigeria	Ghana	Mauritius
Mozambique	Madagascar	Mozambique	Czechia	Madagascar
Nigeria	Uganda	Uganda	Madagascar	Seychelles
Uganda	Mauritius	Seychelles	Sudan	Congo
Madagascar	Seychelles	Madagascar	Uganda	Nigeria
Gabon	Guinea	Rwanda	Mauritius	Uganda
Sudan	Gabon	Mali	Congo	Rwanda
Mali	Mali	Guinea	Gabon	Kenya
Kenya	Congo	Kenya	Mali	Central African Rep.
Czechia	Rwanda	Gabon	Guinea	Gabon
Central African Rep.	Czechia	Sierra Leone	Nigeria	Egypt
Congo	Kenya	Congo	Kenya	United Rep. of Tanzania
United Rep. of Tanzania	United Rep. of Tanzania	Czechia	Rwanda	Morocco
Guinea	Central African Rep.	Senegal	United Rep. of Tanzania	Ivory Coast

## 25. TOP MARKETS - BEYOND AfCFTA

Prepared meat products	Pork	Beef	Poultry	Meat and meat products value chain
United Kingdom	United Kingdom	China	Germany	United Kingdom
France	Italy	France	United Kingdom	France
Germany	Germany	United Kingdom	France	Germany
Belgium	Netherlands	Netherlands	Belgium	China
Netherlands	China	Japan	Netherlands	Netherlands
Japan	France	Germany	China	Belgium
Canada	Belgium	China, Hong Kong SAR	Spain	India
Spain	Romania	Italy	Italy	Italy
Italy	Poland	Spain	India	Spain
China	Spain	Belgium	China, Hong Kong SAR	Japan
China, Hong Kong SAR	Japan	Rep. of Korea	Switzerland	Switzerland
India	China, Hong Kong SAR	India	Japan	China, Hong Kong
Austria	Hungary	USA	Canada	Austria
Denmark	Portugal	Switzerland	Austria	Canada
Switzerland	Greece	United Arab Emirates	Poland	Poland
Hungary	Austria	Russian Federation	Rep. of Korea	Portugal
Rep. of Korea	India	Canada	Russian Federation	Rep. of Korea
Portugal	Rep. of Korea	Singapore	USA	United Arab Emirates
Poland	Slovenia	Thailand	Thailand	Singapore
Sweden	USA	Mexico	Greece	Denmark

## 26. FIRM OPPORTUNITIES

Firm-Segment opportunity matrix		Value chain segment			
		Beef	Prepared meat products	Poultry	Pork
Firm segment	Best markets for small firms and new exporters	China, Zimbabwe, Zambia	United Kingdom, Zimbabwe, Zambia	Zambia, Zimbabwe, United Kingdom	United Kingdom, Zambia, Germany
	Best markets for large, established exporters	China, France, United Kingdom	United Kingdom, France, Germany	Germany, United Kingdom, France	United Kingdom, Italy, Germany
	Best markets for quick-wins	China, United Kingdom, France	United Kingdom, France, Germany	United Kingdom, Germany, Zambia	United Kingdom, Germany, Italy
	Best markets in Africa	Zimbabwe, Zambia, Malawi	Zambia, Zimbabwe, Malawi	Zambia, Zimbabwe, Malawi	Zambia, Zimbabwe, Malawi

## 27. TEXTILES AND CLOTHING - AfCFTA

Competitiveness	Opportunity	Access	Overall Compatibility
<i>Segments suited to our export strengths</i>	<i>Segments with good import opportunities</i>	<i>Segments we have good access to</i>	<i>Top Segments considering all factors</i>
Personal accessories	Clothing, outerwear	Clothing, outerwear	Clothing, outerwear
Clothing, shirts	Other textile products	Clothing, shirts	Clothing, shirts
Clothing, outerwear	Clothing, shirts	Personal accessories	Personal accessories
Clothing, underwear	Personal accessories	Other textile products	Other textile products
Wool & wool yarn	Synthetic fibres & yarns thereof	Synthetic fibres & yarns thereof	Synthetic fibres & yarns thereof
Other textile products	Clothing, underwear	Clothing, underwear	Clothing, underwear

- A broad evaluation of segments in the textiles and clothing value chain suggests that SACU's most significant opportunities lie in the mix of **clothing products**, while prospects for the export of basic textiles and fibres appears to be low.
- **Clothing, outerwear** offers the best opportunity when weighting for demand and market access, whereas **personal accessories** offers the best opportunity when weighting for competitiveness.
- Other textile products features prominently when weighting for demand when compared to clothing products.

## 28. TEXTILES AND CLOTHING - BEYOND AfCFTA

Competitiveness	Opportunity	Access	Overall Compatibility
<i>Segments suited to our export strengths</i>	<i>Segments with good import opportunities</i>	<i>Segments we have good access to</i>	<i>Top Segments considering all factors</i>
Clothing, shirts	Clothing, shirts	Clothing, shirts	Clothing, shirts
Other textile products	Other textile products	Other textile products	Other textile products
Clothing, other	Clothing, other	Clothing, outerwear	Clothing, other
Clothing, outerwear	Clothing, outerwear	Personal accessories	Clothing, outerwear
Clothing, babies' clothes	Clothing, babies' clothes	Clothing, babies' clothes	Clothing, babies' clothes
Clothing, professional	Clothing, professional	Clothing, professional	Personal accessories

- A broad evaluation of segments in the textiles and clothing value chain suggests that SACU's most significant export opportunities lie in the mix of clothing products and technical textiles, while prospects for the export of basic textiles and fibres appears to be low.
- Products under the category **other textile products** include large sturdy sheets (of the type used in tarpaulins or sails) and **packaging of textile materials**.
- **Clothing, shirts** consistently ranks as the best opportunity for the region, followed by other textile products.

## 29. TOP PRODUCTS - AfCFTA

<b>Competitiveness</b>	<b>Opportunity</b>	<b>Access</b>	<b>Balanced</b>
<i>Products suited to our export strengths</i>	<i>Products with good import opportunities</i>	<i>Products we have good access to</i>	<i>Top Products considering all factors</i>
Skins and other parts of birds with their feathers or down, feathers, parts of feathers, down and articles thereof	Staple fibres of polypropylene, not carded, combed or otherwise processed for spinning	Skins and other parts of birds with their feathers or down, feathers, parts of feathers, down and articles thereof	Skins and other parts of birds with their feathers or down, feathers, parts of feathers, down and articles thereof
Men's or boys' shirts of man-made fibres, knitted or crocheted	Worn clothing and clothing accessories, blankets and travelling rugs, household linen and articles for interior furnishing, of all types of textile materials	Women's or girls' trousers, bib and brace overalls, breeches and shorts of synthetic fibres, knitted or crocheted	Women's or girls' trousers, bib and brace overalls, breeches and shorts of synthetic fibres, knitted or crocheted
Women's or girls' trousers, bib and brace overalls, breeches and shorts of synthetic fibres, knitted or crocheted	Jerseys, pullovers, cardigans, waistcoats and similar articles, of man-made fibres, knitted or crocheted	Men's or boys' shirts of man-made fibres, knitted or crocheted	Men's or boys' shirts of man-made fibres, knitted or crocheted
Cotton, neither carded nor combed	Cotton, neither carded nor combed	Worn clothing and clothing accessories, blankets and travelling rugs, household linen and articles for interior furnishing, of all types of textile materials	Worn clothing and clothing accessories, blankets and travelling rugs, household linen and articles for interior furnishing, of all types of textile materials
Staple fibres of polypropylene, not carded, combed or otherwise processed for spinning	Skins and other parts of birds with their feathers or down, feathers, parts of feathers, down and articles thereof	Cotton, neither carded nor combed	Cotton, neither carded nor combed
Carbonised wool, neither carded nor combed	T-shirts, singlets and other vests of cotton, knitted or crocheted	Staple fibres of polyesters, not carded, combed or otherwise processed for spinning	Staple fibres of polypropylene, not carded, combed or otherwise processed for spinning
Full-length or knee-length stockings, socks and other hosiery, incl. footwear without applied soles, of textile materials, knitted or crocheted	Fabrics, knitted or crocheted, of a width of > 30 cm	Full-length or knee-length stockings, socks and other hosiery, incl. footwear without applied soles, of textile materials, knitted or crocheted	Full-length or knee-length stockings, socks and other hosiery, incl. footwear without applied soles, of textile materials, knitted or crocheted
Worn clothing and clothing accessories, blankets and travelling rugs, household linen and articles for interior furnishing, of all types of textile materials	Twine, cordage, ropes and cables of polyethylene or polypropylene	Carbonised wool, neither carded nor combed	Carbonised wool, neither carded nor combed

## 30. TOP PRODUCTS - BEYOND AfCFTA

<b>Competitiveness</b>	<b>Opportunity</b>	<b>Access</b>	<b>Balanced</b>
<i>Products suited to our export strengths</i>	<i>Products with good import opportunities</i>	<i>Products we have good access to</i>	<i>Top Products considering all factors</i>
Skins and other parts of birds with their feathers or down, feathers, parts of feathers, down and articles thereof	Men's or boys' trousers, bib and brace overalls, breeches and shorts, of cotton	Skins and other parts of birds with their feathers or down, feathers, parts of feathers, down and articles thereof	<b>Skins and other parts of birds with their feathers or down, feathers, parts of feathers, down and articles thereof</b>
Men's or boys' shirts of man-made fibres, knitted or crocheted	Women's or girls' trousers, bib and brace overalls, breeches and shorts, of synthetic fibres, knitted or crocheted	Men's or boys' trousers, bib and brace overalls, breeches and shorts, of cotton	<b>Women's or girls' trousers, bib and brace overalls, breeches and shorts, of synthetic fibres, knitted or crocheted</b>
Women's or girls' trousers, bib and brace overalls, breeches and shorts, of synthetic fibres, knitted or crocheted	Women's or girls' trousers, bib and brace overalls, breeches and shorts of textile materials	Men's or boys' shirts of man-made fibres, knitted or crocheted	<b>Men's or boys' shirts of man-made fibres, knitted or crocheted</b>
Women's or girls' trousers, bib and brace overalls, breeches and shorts of textile materials	Jerseys, pullovers, cardigans, waistcoats and similar articles, of man-made fibres, knitted or crocheted	Women's or girls' trousers, bib and brace overalls, breeches and shorts, of synthetic fibres, knitted or crocheted	<b>Men's or boys' trousers, bib and brace overalls, breeches and shorts, of cotton</b>
Men's or boys' trousers, bib and brace overalls, breeches and shorts of textile materials, knitted or crocheted	Skins and other parts of birds with their feathers or down, feathers, parts of feathers, down and articles thereof	Women's or girls' trousers, bib and brace overalls, breeches and shorts of textile materials	<b>Women's or girls' trousers, bib and brace overalls, breeches and shorts of textile materials</b>
Jerseys, pullovers, cardigans, waistcoats and similar articles, of man-made fibres, knitted or crocheted	T-shirts, singlets and other vests of cotton, knitted or crocheted	Jerseys, pullovers, cardigans, waistcoats and similar articles, of man-made fibres, knitted or crocheted	<b>Jerseys, pullovers, cardigans, waistcoats and similar articles, of man-made fibres, knitted or crocheted</b>
Men's or boys' trousers, bib and brace overalls, breeches and shorts, of cotton	Men's or boys' shirts of man-made fibres, knitted or crocheted	Men's boys' shirts of cotton, knitted or crocheted	<b>Men's boys' shirts of cotton, knitted or crocheted</b>
Men's boys' shirts of cotton, knitted or crocheted	T-shirts, singlets and other vests of textile materials, knitted or crocheted	T-shirts, singlets and other vests of textile materials, knitted or crocheted	<b>Men's or boys' trousers, bib and brace overalls, breeches and shorts of textile materials, knitted or crocheted</b>



## 31. TOP MARKETS - AfCFTA

Clothing, outerwear	Clothing, shirts	Personal accessories	Other textile products	Synthetic fibres & yarns thereof	Textiles & clothing value chain
Zambia	Zambia	Zimbabwe	Zambia	Mozambique	Zimbabwe
Malawi	Zimbabwe	Zambia	Malawi	Mauritius	Zambia
Mauritius	Malawi	Malawi	Ghana	Zimbabwe	Malawi
Zimbabwe	Ghana	Kenya	Zimbabwe	Malawi	Mozambique
Morocco	Mauritius	Mozambique	Kenya	Zambia	Mauritius
Angola	Angola	Uganda	Angola	Kenya	Madagascar
Rwanda	Nigeria	Seychelles	Uganda	Angola	Ghana
Ghana	Mozambique	Morocco	Madagascar	Nigeria	Angola
Uganda	Kenya	Madagascar	Rwanda	Algeria	Kenya
Mozambique	Uganda	Ghana	Mauritius	Uganda	Uganda
Seychelles	Seychelles	Angola	Mozambique	Ghana	Nigeria
Kenya	Burkina Faso	Congo	Morocco	Madagascar	Seychelles
Nigeria	Madagascar	Nigeria	Sierra Leone	Egypt	Rwanda
Madagascar	Morocco	Rwanda	Nigeria	Rwanda	Congo
Gabon	Gabon	United Rep. of Tanzania	Liberia	Morocco	Morocco
Tunisia	Guinea	Central African Rep.	Burkina Faso	Senegal	Egypt
Burkina Faso	Mali	Ethiopia	Seychelles	Seychelles	United Rep. of Tanzania
Guinea	Rwanda	Cameroon	Congo	Ethiopia	Ethiopia
Egypt	Cameroon	Niger	Gabon	United Rep. of Tanzania	Cameroon
Sierra Leone	Algeria	Burkina Faso	Mali	Sudan	Burkina Faso

## 32. TOP MARKETS - BEYOND AfCFTA

Clothing, shirts	Other textile products	Clothing, other	Clothing, outerwear	Textiles & Clothing Value Chain
United Kingdom	India	France	United Kingdom	United Kingdom
France	United Kingdom	Netherlands	France	China
Netherlands	Netherlands	United Kingdom	Germany	India
Germany	France	Germany	Netherlands	Germany
Japan	Germany	Belgium	China	France
Italy	China	Italy	Italy	Netherlands
China	Belgium	Spain	Japan	Italy
Spain	Japan	Japan	Spain	Spain
Canada	Italy	Canada	Belgium	Belgium
India	Spain	China	Canada	Japan
Belgium	Canada	Poland	Switzerland	Switzerland
Switzerland	USA	USA	India	Poland
United Arab Emirates	United Arab Emirates	Switzerland	China, Hong Kong SAR	China, Hong Kong SAR
China, Hong Kong SAR	Rep. of Korea	India	Rep. of Korea	Austria
Australia	China, Hong Kong SAR	China, Hong Kong SAR	USA	Rep. of Korea
Rep. of Korea	Poland	Rep. of Korea	Poland	Turkey
USA	Singapore	Singapore	Austria	Australia
Singapore	Switzerland	United Arab Emirates	Australia	Canada
Poland	Thailand	Austria	United Arab Emirates	Singapore
Austria	Austria	Sweden	Singapore	Portugal

## 33. FIRM OPPORTUNITIES

Firm-Segment opportunity matrix		Shirts	Outerwear	Other textile products	Clothing, other	Personal accessories	Synthetic fibres & yarns thereof
Firm segment	Best markets for small firms and new exporters	United Kingdom, Zambia, Zimbabwe	United Kingdom, Zambia, Zimbabwe	India, Zambia, Zimbabwe	Malawi, United Kingdom, Zambia	Zimbabwe, Zambia, Malawi	Zimbabwe, Zambia, India
	Best markets for large, established exporters	United Kingdom, France, Netherlands	United Kingdom, France, Germany	India, United Kingdom, Netherlands	France, Netherlands, United Kingdom	United Kingdom, Germany, France	China, India, United Kingdom
	Best markets for quick-wins	United Kingdom, France, Netherlands	United Kingdom, France, Germany	India, United Kingdom, Netherlands	France, United Kingdom, Netherlands	United Kingdom, Germany, France	China, India, Kingdom
	Best markets in Africa	Zambia, Malawi, Mauritius	Zambia, Zimbabwe, Malawi	Zambia, Zimbabwe, Malawi	Malawi, Zambia, Zimbabwe	Malawi, Zambia, Zimbabwe	Zimbabwe, Zambia, Malawi

## 34. ESSENTIAL OILS AND COSMETICS - AfCFTA

Competitiveness	Opportunity	Access	Overall Compatibility
<i>Segments suited to our export strengths</i>	<i>Segments with good import opportunities</i>	<i>Segments we have good access to</i>	<i>Top Segments considering all factors</i>
Essential oils	Essential oils	Essential oils	Essential oils
Cosmetics	Cosmetics	Cosmetics	Cosmetics

- SACU has better potential in the essential oils than in the cosmetics segment.
- An assessment of individual products indicates that good prospects lie in mixtures of odoriferous substances of a kind used in the manufacture of beverages, soaps, preparations for waving or straightening and beauty or make-up preparations (see slide 36).
- It is worth noting that on the individual product level, consumer cosmetics sector appears to have fared as well as the essential oils sector in the African continent.

## 35. ESSENTIAL OILS AND COSMETICS - BEYOND AfCFTA

Competitiveness	Opportunity	Access	Overall Compatibility
<i>Segments suited to our export strengths</i>	<i>Segments with good import opportunities</i>	<i>Segments we have good access to</i>	<i>Top Segments considering all factors</i>
Cosmetics	Cosmetics	Cosmetics	Cosmetics
Essential oils	Essential oils	Essential oils	Essential oils

- An initial assessment of the value chain indicates that SACU has strong potential in the category of **consumer cosmetics**, albeit with the region having slightly weak competitiveness in this segment.
- An assessment of individual products indicates that good prospects lie in mixtures of odoriferous substances of a kind used in the manufacture of beverages, personal deodorants and antiperspirants and organic surface-active products and preparations for washing the skin (see slide 37).

## 36. TOP PRODUCTS - AfCFTA

<b>Competitiveness</b>	<b>Opportunity</b>	<b>Access</b>	<b>Balanced</b>
<i>Products suited to our export strengths</i>	<i>Products with good import opportunities</i>	<i>Products we have good access to</i>	<i>Top Products considering all factors</i>
Mixtures of odoriferous substances and mixtures, of a kind used in the food and drink industries	Mixtures of odoriferous substances and mixtures, of a kind used in the food and drink industries	Mixtures of odoriferous substances and mixtures, of a kind used in the food and drink industries	<b>Mixtures of odoriferous substances and mixtures, of a kind used in the food and drink industries</b>
Soap in the form of flakes, granules, powder, paste or in aqueous solution	Soap in the form of flakes, granules, powder, paste or in aqueous solution	Soap in the form of flakes, granules, powder, paste or in aqueous solution	<b>Soap in the form of flakes, granules, powder, paste or in aqueous solution</b>
Preparations for permanent waving or straightening	Soap and organic surface-active products and preparations	Beauty or make-up preparations	<b>Soap and organic surface-active products and preparations</b>
Soap and organic surface-active products and preparations	Beauty or make-up preparations	Soap and organic surface-active products and preparations	<b>Preparations for permanent waving or straightening</b>
Personal deodorants and antiperspirants	Sanitary towels (pads) and tampons, napkins and napkin liners for babies, and similar articles	Preparations for permanent waving or straightening	<b>Beauty or make-up preparations</b>
Sanitary towels (pads) and tampons, napkins and napkin liners for babies, and similar articles	Dentifrices, incl. those used by dental practitioners	Sanitary towels (pads) and tampons, napkins and napkin liners for babies, and similar articles	<b>Sanitary towels (pads) and tampons, napkins and napkin liners for babies, and similar articles</b>
Beauty or make-up preparations	Personal deodorants and antiperspirants	Personal deodorants and antiperspirants	<b>Personal deodorants and antiperspirants</b>
Preparations for oral or dental hygiene, incl. denture fixative pastes and powders	Preparations for permanent waving or straightening	Dentifrices, incl. those used by dental practitioners	<b>Dentifrices, incl. those used by dental practitioners</b>
Dentifrices, incl. those used by dental practitioners	Perfumes and toilet waters (excl. after shave lotions, personal deodorants and hair lotions)	Preparations for use on the hair	<b>Organic surface-active products and preparations for washing the skin, in the form of liquid or cream and put up for retail sale, whether or not containing soap</b>

## 37. TOP PRODUCTS - BEYOND AfCFTA

<b>Competitiveness</b>	<b>Opportunity</b>	<b>Access</b>	<b>Balanced</b>
<i>Products suited to our export strengths</i>	<i>Products with good import opportunities</i>	<i>Products we have good access to</i>	<i>Top Products considering all factors</i>
Mixtures of odoriferous substances and mixtures, of a kind used in the food and drink industries	Mixtures of odoriferous substances and mixtures, of a kind used in the food and drink industries	Mixtures of odoriferous substances and mixtures, of a kind used in the food and drink industries	Mixtures of odoriferous substances and mixtures, of a kind used in the food and drink industries
Soap in the form of flakes, granules, powder, paste or in aqueous solution	Sanitary towels (pads) and tampons, napkins and napkin liners for babies, and similar articles	Personal deodorants and antiperspirants	Personal deodorants and antiperspirants
Personal deodorants and antiperspirants	Organic surface-active products and preparations for washing the skin, in the form of liquid or cream and put up for retail sale	Organic surface-active products and preparations for washing the skin, in the form of liquid or cream and put up for retail sale	Organic surface-active products and preparations for washing the skin, in the form of liquid or cream and put up for retail sale
Preparations for permanent waving or straightening	Personal deodorants and antiperspirants	Sanitary towels (pads) and tampons, napkins and napkin liners for babies, and similar articles	Sanitary towels (pads) and tampons, napkins and napkin liners for babies, and similar articles
Organic surface-active products and preparations for washing the skin, in the form of liquid or cream and put up for retail sale	Shampoos	Soap in the form of flakes, granules, powder, paste or in aqueous solution	Soap in the form of flakes, granules, powder, paste or in aqueous solution
Sanitary towels (pads) and tampons, napkins and napkin liners for babies, and similar articles	Preparations for use on the hair	Shampoos	Shampoos
Oils of sweet and bitter orange, whether or not terpenes, incl. concretes and absolutes	Perfumes and toilet waters	Essential oils of citrus fruit, whether or not terpenes, incl. concretes and absolutes	Preparations for use on the hair
Essential oils of citrus fruit, whether or not terpenes, incl. concretes and absolutes	Soap in the form of flakes, granules, powder, paste or in aqueous solution	Oils of sweet and bitter orange, whether or not terpenes, incl. concretes and absolutes	Depilatories and other perfumery, toilet or cosmetic preparations, n.e.s.
Soap and organic surface-active products and preparations	Mixtures of odoriferous substances and mixtures, of a kind used as raw materials in industry	Depilatories and other perfumery, toilet or cosmetic preparations, n.e.s.	Perfumes and toilet waters
Extracted oleoresins	Depilatories and other perfumery, toilet or cosmetic preparations, n.e.s.	Extracted oleoresins	Preparations for perfuming or deodorising rooms, incl. odoriferous preparations used during religious rites

## 38. TOP MARKETS - AfCFTA

Odoriferous substances	Soap	Soap and organic surface-active products	Preparations for permanent waving or straightening	Beauty or make-up preparations	Essential oils and cosmetics value chain
Zambia	Malawi	Zimbabwe	Malawi	Zambia	Zimbabwe
Malawi	Zambia	Zambia	Ghana	Zimbabwe	Zambia
Zimbabwe	Zimbabwe	Angola	Zambia	Mauritius	Malawi
Angola	Mauritius	Malawi	Zimbabwe	Malawi	Mozambique
Mauritius	Ghana	Ghana	Mauritius	Ghana	Ghana
Ghana	Angola	Rwanda	Angola	Kenya	Mauritius
Rwanda	Nigeria	Mauritius	Gabon	Rwanda	Angola
Uganda	Rwanda	Mozambique	Uganda	Angola	Madagascar
Nigeria	Mozambique	Uganda	Rwanda	Nigeria	Kenya
Mozambique	Madagascar	Seychelles	Kenya	Uganda	Nigeria
Kenya	Uganda	Mali	Mozambique	Morocco	Uganda
Madagascar	Seychelles	Madagascar	Seychelles	Mozambique	Congo Rep.
Cameroon	Kenya	Kenya	Madagascar	Cameroon	Rwanda
Sudan	Burkina Faso	Sierra Leone	Morocco	Sudan	Egypt
Seychelles	Sudan	Cameroon	Algeria	Seychelles	United Rep. of Tanzania
Senegal	Sierra Leone	Congo	United Rep. of Tanzania	Burkina Faso	Morocco
Gabon	Gabon	United Rep. of Tanzania	Congo	Mali	Seychelles
Sierra Leone	Algeria	Niger	Liberia	Madagascar	Cameroon
Mali	Mali	Burkina Faso	Nigeria	Djibouti	Ethiopia
Ethiopia	Guinea	Central African Rep.	Ethiopia	Liberia	Burkina Faso



## 39. TOP MARKETS - BEYOND AfCFTA

Odoriferous substances	Beauty or make-up preparations	Soaps	Organic surface-active products & preparations	Essential oils & Cosmetics Value Chain
Mexico	China	United Arab Emirates	China	Singapore
Belgium	India	Saudi Arabia	Singapore	India
Singapore	Singapore	India	Netherlands	United Kingdom
Netherlands	United Kingdom	Netherlands	France	Sri Lanka
United Kingdom	France	Singapore	United Kingdom	China
Germany	Germany	Portugal	Canada	Netherlands
China	Netherlands	United Kingdom	United Arab Emirates	Belgium
France	Canada	Germany	Japan	Germany
Canada	Belgium	Oman	Belgium	France
India	Italy	Canada	Germany	Spain
Italy	Japan	China	Philippines	United Arab Emirates
Spain	Spain	Italy	Italy	Malaysia
Switzerland	China, Hong Kong SAR	Spain	Switzerland	Pakistan
China, Hong Kong SAR	Poland	Turkey	Poland	Switzerland
Philippines	Indonesia	Japan	Spain	Brazil
Argentina	United Arab Emirates	Austria	Russian Federation	Austria
Peru	Switzerland	Switzerland	Austria	Italy
Rep. of Korea	Mexico	Pakistan	Romania	Australia
Finland	Malaysia	Poland	Australia	Portugal
USA	Thailand	Australia	Vietnam	Greece

## 40. FIRM OPPORTUNITIES

Firm-Segment opportunity matrix		Value chain segment			
		Odoriferous substances	Soaps	Soap & organic surface-active products	Beauty or make-up preparations
Firm segment	Best markets for small firms and new exporters	Zambia, Malawi, Zimbabwe	Malawi, Zambia, Zimbabwe	Zimbabwe, Zambia, Malawi	Zambia, Zimbabwe, Singapore
	Best markets for large, established exporters	Zambia, Malawi, Singapore	United Arab Emirates, Malawi, Singapore	Australia, France, Angola	China, Singapore, India
	Best markets for quick-wins	Zambia, Malawi, Singapore	Malawi, Zambia, Zimbabwe	Zimbabwe, Zambia, Angola	China, Singapore, India
	Best markets in Africa	Zambia, Malawi, Zimbabwe	Malawi, Zambia, Zimbabwe	Zimbabwe, Zambia, Angola	China, Singapore, India

## 48. KEY TAKEAWAYS

- The results of the model indicates that **leather products (including bags, cases and wallets)** and **leather footwear** offer the best opportunities in the leather and leather products value chain at present, but there should also be a focus on improving regional competitiveness and capacity in these areas.
- In the fruit and vegetables value-chain, while there are general opportunities for fruit and vegetable products not classified, **grapes, citrus, apples, cranberries** and **pears** offer opportunities at present while the region can leverage existing strengths to move into value added products such as **fruit juice** and **fruit preserves**.
- In addition, support to emerging products should focus on commodities like **cranberries** and **macadamia nuts**.
- **Beef** and **prepared meat products** offer the best opportunities for the region in the AfCFTA and beyond, while **pork** products are an emerging area of interest specifically for the rest of the world.

## 49. KEY TAKEAWAYS (CONTINUED)

- A broad evaluation of segments in the textiles and clothing value chain suggests a mix of clothing products (outerwear, shirts and trousers) presents opportunities, as well as technical textiles (for tarpaulin, sails and packaging).
- Essential oil mixtures of odoriferous substances (used for soaps and beverages), as well as soaps, beauty and make-up preparations, a personal deodorants and antiperspirants feature as products with the highest export potential in the essential oils and cosmetics value chain.

# Thank You !