

INTRA-AFRICA AGRICULTURAL TRADE

**EAST AFRICAN COMMUNITY (EAC) AND
THE INTERGOVERNMENTAL AUTHORITY
ON DEVELOPMENT (IGAD)**



MAY 2024

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EXECUTIVE SUMMARY

This analysis examines the trade patterns of East African Community (EAC) and Inter-Governmental Authority on Development (IGAD) member countries in agricultural commodities. The scope of the report includes an analysis of the trade patterns, trends, and main export and import market of main agricultural commodities, such as cereals, coffee, tea, edible fruits and nuts, edible vegetables, flowers, and cocoa beans, within the EAC and IGAD countries.

Within the EAC, key commodities like Tea, Cereals (including Rice and Maize), Coffee, and Edible Vegetables show substantial export values, indicating the region's strength in these sectors. Tea emerges as a significant export, with a trade surplus and notable growth, showcasing the EAC's prowess in the global tea market. Similarly, cereals exhibit a mixed balance, with both exports and imports indicating reliance on both domestic production and international sourcing. Coffee and cut flowers also demonstrate positive growth trends, emphasizing the diversification and expansion of agricultural exports within the EAC. In terms of imports, cereals remain crucial, with substantial demand evident for staple commodities like maize, rice, and wheat across the EAC. Notably, there is a significant increase in the importation of cereals, highlighting the region's need to supplement domestic production to meet consumption demands. However, there are fluctuations in imports of specific commodities like grain sorghum and certain vegetables, indicating shifting market dynamics and consumption patterns. Overall, the agricultural trade performance within the EAC underscores the region's role as a key player in intra-Africa trade, with opportunities for further growth and diversification.

The analysis reveals that the studied countries predominantly trade agricultural commodities within their respective regions, particularly within the East African Community (EAC). Uganda, Kenya, Tanzania, Rwanda, and Burundi primarily engage in intra-regional trade, with Kenya serving as a central hub. However, Ethiopia, a member of the Inter-Governmental Authority on Development (IGAD), stands out by exporting agricultural commodities primarily outside the EAC region, notably to Somalia, Djibouti, Egypt, South Africa, and Kenya. Despite this, Kenya emerges as a common market for agricultural commodities across both the EAC and IGAD countries studied. Other common markets include Egypt, South Africa and the Democratic Republic of the Congo (DRC). This underscores the pivotal role of Kenya as a central trading partner within both the EAC and IGAD regions, emphasizing the importance of cross-regional cooperation and trade agreements.

While intra-regional trade dominates, engagement with diverse partners across Africa is evident. Policy interventions are crucial to address trade imbalances. Policy harmonization, infrastructure development, and capacity building are imperative to foster a resilient agricultural sector. Diversification of exports, addressing trade imbalances, and enhancing climate resilience are essential for sustainable growth. Continued regional integration and data sharing will facilitate informed decision-making and strengthen agricultural trade networks.





I Introduction & Background

I.1 Introduction

The regional economic interactions within the East African Community (EAC), the Intergovernmental Authority on Development (IGAD), and the African Continental Free Trade Area (AfCFTA) are significantly shaped by the pivotal roles played by these trade arrangements. Specifically, the rules of origin and preferences granted to agricultural commodities emerge as influential factors in determining the dynamics of cross-border trade within these regional blocs. Within the EAC, the adherence to rules of origin and the preferential treatment of select agricultural goods can significantly impact the overall trade flow. Similarly, IGAD, operating as a regional organization in East Africa, actively works towards trade facilitation by offering preferences and delineating rules of origin for its member states. Meanwhile, the AfCFTA, extending its influence across the entire African continent, endeavors to establish a single market, fostering intra-African trade through the systematic elimination of barriers and the establishment of clear rules of origin. Despite these concerted efforts, persistent impediments continue to hinder cross-border agricultural trade in these regions, with challenges such as non-tariff barriers, insufficient infrastructure, and diverse regulatory frameworks posing significant obstacles. Effectively addressing these issues becomes paramount for creating a more seamless and prosperous environment for agricultural trade across the EAC, IGAD, and Africa as a whole.

The East African Community (EAC) stands as a regional economic bloc committed to fostering cooperation and integration among its member states namely Burundi, Democratic Republic of Congo, Kenya, Rwanda, Somalia, South Sudan, Tanzania, Uganda. Tanzania, Uganda and Kenya were the founding members (July 2020), while Rwanda and Burundi joined in 2007. South Sudan became a member after its accession in 2016, marking the EAC's commitment to regional integration and cooperation and recently Democratic Republic of Congo and Somalia become newest members in July 2022 and December

2023 respectively. On the other hand, IGAD, the Intergovernmental Authority on Development, comprises a consortium of eight member states: Djibouti, Ethiopia, Kenya, Somalia, South Sudan, Sudan, and Uganda (Eritrea is presently inactive). The organization is headquartered in Djibouti and is dedicated to supporting and enhancing the initiatives of its member states in various domains, including peace, security, agriculture, environment, economic cooperation, and social development. Nevertheless, the presence of overlapping membership in both regional organizations by Kenya, Uganda, and South Sudan presents challenges such as the duplication of efforts and coordination issues.

In the pursuit of economic development and food security, the EAC and IGAD places significant emphasis on intra-regional trade in agricultural commodities. Agriculture, being a cornerstone of the economies in the EAC, IGAD and Africa in general, plays a pivotal role in ensuring food self-sufficiency and generating income for millions of individuals.



The East African Community (EAC), with a population of 301.8 million and a GDP of US\$ 312.9 billion as of 2021, faces significant challenges in ensuring food security for its diverse and growing population.



POPULATION
301.8
MILLION



GDP
US\$ 312.9
BILLION

Recognizing the potential for growth and collaboration, the EAC and IGAD has been actively working towards the facilitation and promotion of intra-regional trade in agricultural commodities. The agricultural sector, accounting for 25%-40% of the EAC Partner States' Gross Domestic Product (GDP) and employing over 80% of the population, forms a vital foundation for economic activity in the region. With more than 70% of industries in the EAC being agro-based and relying on agriculture as a primary source of raw materials, the emphasis on intra-regional trade further strengthens the sector's significance. Agricultural commodities, constituting about 65% of the volume of intra-regional trade in the EAC, play a crucial role in fostering economic collaboration and enhancing food security. The sector's dominance by smallholder mixed farming highlights its diverse contributions, ranging from livestock and food crops to cash crops, fishing, and aquaculture. As the EAC continues to prioritize agricultural development, these efforts not only stimulate economic growth but also contribute significantly to regional sustainability and cooperation.

On the other hand, the Intergovernmental Authority on Development (IGAD) is a regional organization in Africa that was established with the aim of promoting economic cooperation and integration, as well as addressing issues related to peace and security in the Horn of Africa. IGAD was officially launched in 1986 with the signing of the Agreement Establishing the Intergovernmental Authority on Drought and Development. Originally formed to tackle the challenges of drought and desertification in the region, IGAD's mandate expanded over time to include broader economic and political cooperation.

1.2 Study Objectives

This study analyzes the main agricultural commodities trade in EAC and IGAD countries and the rest of Africa. It consolidates and analyzes data published by the International Trade Centre (ITC) for the period 2018-2022 to quantify and identify trends in trade of main agricultural commodities and markets. The Agricultural products included are; cereals, Coffee, Tea, Edible Fruits and Nuts, Edible vegetables and certain roots and tubers, Flowers and Cocoa beans.



1. To analyze the main agricultural commodities trade in EAC and IGAD countries and the rest of Africa for the period 2018-2022.



2. To quantify and identify trends in trade of main agricultural commodities and markets.



3. To provide recommendations based on the analysis for improving trade practices and policies in the agricultural sector within these regions.



2 Trade Performance

2.1 EAC Agricultural Commodity Trade Performance with the Rest of Africa

Over the 5-year period, a comparison of the export and import values for various commodities within the East African Community (EAC) reveals that Tea is a significant export, amounting to USD 1,926.69 million highlighting the EAC's strength in the global tea market while imports were valued at USD 76.5 million over the same period. Similarly, Cereals exhibited a significant trade balance, with exports totaling USD 1,820.88 million and imports at USD 2,176.45 million, indicating a reliance on both domestic production and international sourcing. Coffee demonstrated a substantial export value of USD 779.94 million while its import value was USD 99.09 million.

During the period, the value of Rice and Maize or Corn total EAC exports amounted to **USD 899.64 million and USD 588.14 million respectively, and import values of USD 892.81 million and USD 911.59 million. Notably, Grain Sorghum, Edible Vegetables and Edible Fruit exhibit a trade deficit, with higher import values compared to exports over the five years. Conversely, cut flowers and Cocoa Beans reveal a trade surplus, with an export value of USD 53.5 million against imports of USD 0.8 million and USD 25.36 million against imports of USD 4.04 million respectively.**

Tea exports increased by 34.3%, rising from USD 371 million in 2018 to USD 498 million in 2022 while coffee exports increased by 104.1%, growing from USD 111 million in 2018 to USD 227 million in 2022. Similarly, cereals exports experienced positive growth at 21.1%, increasing from USD 312 million to USD 377 million between 2018 and 2022. Among cereals, rice exhibited the largest change with a notable 153.5% increase during the same period. However, there was a decline in maize and grain sorghum exports, decreasing from USD 139 million to USD 132 million (5.1%) and USD 88 million to USD 51 million (41.8%) respectively from 2018 to 2022. On a positive note, there was a noteworthy increase in EAC exports

of edible vegetables, fruits and ornamental flowers (Edible vegetables: 12.0% increase, USD 157 million to USD 176 million; Edible fruits: 168.9% increase, USD 16 million to USD 43 million; Cut flowers: 85.2% increase, USD 7 million to USD 12 million) between the two periods. In addition, cocoa bean exports surged by 1670.1%, soaring from USD 0.41 million in 2018 to USD 7.23 million in 2022, highlighting a growing cocoa industry within the EAC, notably in the Democratic Republic of Congo (DRC).

In terms of imports from Africa, Tea imports experienced a significant decline of 61.3%, dropping from USD 21.26 million in 2018 to USD 8.22 million in 2022. Similarly, Coffee imports demonstrated a 15.0% decrease, decreasing from USD 16.75 million in 2018 to USD 14.24 million in 2022. In contrast, cereals imports displayed a robust 60.9% increase, rising from USD 366.23 million in 2018 to USD 589.01 million in 2022 (60.9%), indicating a substantial demand for these staple commodities. In terms of cereals, rice imports increased by 289.1% from USD 56.42 million to USD 219.96 million during the same period. Also, Maize imports from Africa experienced a 50.0% growth, increasing from USD 199.67 million to USD 300.07 million. However, grain sorghum imports saw a notable decline of 41.7%, dropping from USD 95.63 million to USD 55.87 million. On the other hand, Edible Vegetables and Certain Roots Tubers imports decreased by 33.5%, declining from USD 159.37 million to USD 105.95 million while edible fruit and nuts imports grew by 15.4%, increasing from USD 50.92 million to USD 58.80 million. Noteworthy, imports of cut flowers and flower buds demonstrated 78.4% increase rising from USD 0.13 million to USD 0.24 million, while cocoa beans imports declined of by 88.9%, decreasing from USD 0.28 million to USD 0.03 million.



TABLE 1:
EAC-intra Africa Agricultural Commodities and Products Exports (Five year Period in Million USD)

		2018	2019	2020	2021	2022	Total
EXPORTS 	Tea	371.0	342.4	337.0	378.5	497.8	1926.7
	Cereals	311.6	259.6	349.5	523.1	377.1	1820.9
	Rice	73.1	102.9	194.8	343.2	185.6	899.6
	Edible vegetables and certain roots and tubers	157.4	94.0	128.2	139.6	176.3	695.5
	Coffee	111.3	111.1	134.8	195.8	226.9	779.9
	Edible fruit and nuts	15.8	15.2	26.1	31.3	42.5	131.1
	Maize or corn	138.7	91.4	102.2	124.1	131.8	588.1
	Grain sorghum	88.1	56.7	43.9	47.2	51.3	287.2
	Cotton	18.3	16.6	13.0	15.9	17.6	81.4
	Cut flowers and flower buds	6.5	8.2	5.3	21.4	12.0	53.5
	Cocoa beans (whole or broken, raw or roasted)	0.4	4.1	4.6	9.0	7.2	25.4
		2018	2019	2020	2021	2022	Total
IMPORTS 	Cereals	366.2	272.0	309.9	639.3	589.0	2176.4
	Maize or corn	199.7	122.1	99.1	190.6	300.1	911.6
	Rice	56.4	55.5	166.8	394.2	220.0	892.8
	Edible vegetables and certain roots and tubers	159.4	83.4	100.0	95.8	105.9	544.5
	Grain sorghum	95.6	80.5	34.5	40.3	55.9	306.9
	Edible fruit and nuts	50.9	44.9	48.7	60.1	58.8	263.4
	Coffee	16.8	19.4	26.5	22.2	14.2	99.1
	Cotton	12.6	14.1	15.2	19.5	27.2	88.6
	Tea	21.3	14.7	16.3	16.1	8.2	76.5
	Cocoa beans (whole or broken, raw or roasted)	0.3	1.0	2.6	0.1	0.0	4.0
	Cut flowers and flower buds	0.1	0.1	0.1	0.2	0.2	0.8

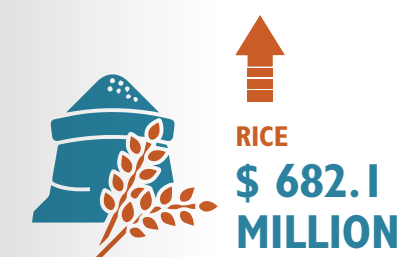
Source: ITC

2.2 Selected EAC and IGAD Partner States Agricultural Commodity Export Performance Trend with the rest of Africa

Table 2 illustrates the top agricultural exports by selected countries within EAC and IGAD over a five-year period from 2018 to 2022.

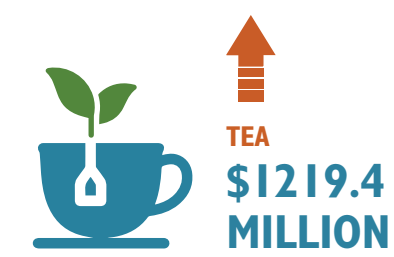
2.2.1 Tanzania

In Tanzania, rice was the top export with a value of USD 682.1 million, followed by maize at USD 274.4 million USD. In addition, vegetables, tea and coffee industry also play a significant role in Tanzania's exports, with a cumulative value of USD 101.0 million, USD 91.2 million and USD 62.0 million respectively within Africa. Other primary agricultural food commodities exported by Tanzania include groundnuts, edible fruits and nuts, soyabeans and grain sorghum. Among these commodities, Groundnuts experienced the highest growth in exports from Tanzania to Africa, with a percentage growth of approximately 10,950%. This is followed by Soya Beans, Whether or Not Broken, with a growth rate of around 2,700%, and rice showing substantial growth of approximately 1587.83%. These commodities have shown significant expansion in export values, reflecting evolving market dynamics and potentially increased demand for these products in the African region.



2.2.2 Kenya

Over the five year period, the top exports of Kenya to Africa are Tea (USD 1,219.4 million), rice (USD 682.1 million), maize or corn (USD 274.4 million), Edible vegetables and certain roots and tubers (USD 151.3 Million) and cut flowers and flower buds (USD 38.3 million). Kenya primarily exports its coffee to destinations outside of Africa, despite it being one of the leading agricultural commodities produced within the country. Between 2018 and 2022, Kenya's export values to Africa witnessed notable percentage changes across various commodities. Grain Sorghum experienced an outstanding growth of approximately 1500%, escalating from USD 0.7 million to USD 11.2 million. The export values for Maize or Corn demonstrated a moderate increase of around 99.53%, rising from USD 42.8 million to USD 85.3 million. Rice exhibited substantial growth of approximately 1486.96%, with export values soaring from USD 11.5 million to USD 182.6 million USD. Edible Vegetables and Certain Roots and Tubers showed a moderate growth of about 54.31%, increasing from USD 19.7 million to USD 30.5 million. Tea, a significant export for Kenya, experienced a moderate growth of approximately 14.74%, reaching USD 279.6 million from USD 243.7 million. Coffee demonstrated a moderate growth of around 93.94%, moving from USD 3.3 million to USD 6.4 million USD. Cut Flowers and Flower and Edible Fruit and Nuts also experienced a significant growth during the same period.



2.2.3 Ethiopia

In Ethiopia, edible vegetables and certain roots and tubers have consistently constituted a significant portion of the country's agricultural exports, amounting to USD 1,930.2 million over the specified period. This category encompasses a diverse array of vegetables, including root vegetables, underscoring Ethiopia's rich agricultural diversity. Another noteworthy export category is that of other fresh or chilled vegetables, making a substantial contribution of USD 1,257.8 million. This underscores Ethiopia's capability to supply fresh produce, meeting both regional and international demands. Moreover, arrowroot, salep, Jerusalem artichokes, and similar roots and tubers experienced a remarkable surge in export value, rising from USD 25.6 million in 2019 to USD 129.6 million in 2021, signaling a growing market for these specific agricultural products. Additionally, Ethiopia's exports were bolstered by dried leguminous vegetables and potatoes, contributing USD 129.0 million and USD 67.0 million, respectively. This diverse portfolio exemplifies Ethiopia's robust position in the global agricultural market. Among the commodities, Arrowroot, Salep, Jerusalem Artichokes and Roots and Tubers experienced the most significant growth, although the percentage change is undefined for 2018 due to no initial exports. Edible Fruit and Nuts also showed positive growth, while Other Fresh or Chilled Vegetables, Dried Leguminous Vegetables, Potatoes, and Coffee experienced declines in export values over the specified period.

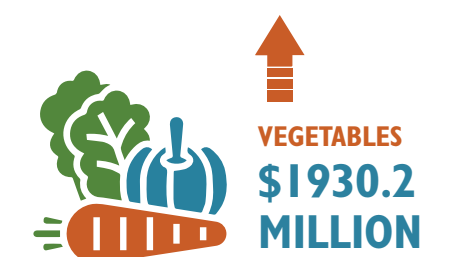


TABLE 2:
Intra Africa agricultural commodity exports by member country, 2018-2022 (US\$ million)

		2018	2019	2020	2021	2022	Total (5-yr)
TANZANIA 	Rice	11.5	44.5	141.8	301.8	182.6	682.1
	Maize or corn	42.8	32.3	23.9	90.1	85.3	274.4
	Edible vegetables and certain roots and tubers	7.7	17.3	22.3	20.0	33.7	101.0
	Tea, whether or not flavoured	23.9	22.8	10.4	17.1	17.0	91.2
	Coffee	10.0	8.3	6.5	15.9	21.3	62.0
	Groundnuts	0.2	2.6	10.3	11.8	22.1	47.0
	Edible fruit and nuts	4.3	3.0	6.0	5.0	16.8	35.0
	Grain sorghum	0.7	0.8	4.2	6.8	11.2	23.6
	Soya beans, whether or not broken	0.4	2.0	0.8	6.9	11.2	21.3
	Wheat and meslin	0.3	0.0	0.3	0.3	1.8	2.7
KENYA 	Tea, whether or not flavoured	243.7	226.8	212.7	256.4	279.6	1219.4
	Rice	11.5	44.5	141.8	301.8	182.6	682.1
	Maize or corn	42.8	32.3	23.9	90.1	85.3	274.4
	Edible vegetables and certain roots and tubers	19.7	19.1	47.5	34.6	30.5	151.3
	Cut flowers and flower buds	0.0	0.0	5.3	21.4	11.7	38.3
	Edible fruit and nuts	4.3	3.0	6.0	5.0	16.8	35.0
	Grain sorghum	0.7	0.8	4.2	6.8	11.2	23.6
	Coffee	3.3	2.6	1.4	7.3	6.4	21.0
ETHIOPIA 	Edible vegetables and certain roots and tubers	352.3	389.5	374.3	453.6	360.6	1930.2
	Other Fresh or chilled vegetables	267.6	236.2	256.2	267.4	230.4	1257.8
	Arrowroot, salep, Jerusalem artichokes and similar roots and tubers	0.0	25.6	72.3	129.6	57.4	284.9
	Coffee	40.4	30.4	34.6	26.8	36.3	168.6
	Dried leguminous vegetables	32.4	50.9	13.4	9.7	22.5	129.0
	Potatoes	18.5	12.1	7.2	11.6	17.6	67.0
	Edible fruit and nuts	6.0	6.6	7.0	8.6	6.4	34.7

Source: ITC

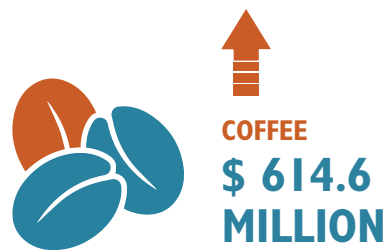
TABLE 2:
Intra Africa agricultural commodity exports by member country, 2018-2022 (US\$ million)

		2018	2019	2020	2021	2022	Total (5-yr)
UGANDA 	Coffee	80.2	86.7	113.2	149.9	184.5	614.6
	Tea, whether or not flavoured	88.8	78.0	78.1	84.8	88.1	417.6
	Dairy produce	72.5	68.3	74.9	86.1	115.4	417.2
	Edible vegetables and certain roots and tubers	109.1	44.8	53.2	81.5	108.2	396.8
	Dried leguminous vegetables, shelled, whether or not skinned or split	90.3	33.6	34.9	69.0	89.8	317.5
	Maize or corn	89.5	52.7	66.2	26.1	41.3	275.7
	Grain sorghum	66.5	36.1	12.4	17.4	37.0	169.4
	Rice	26.9	25.8	18.6	4.9	2.4	78.6
	Edible fruit and nuts	6.5	7.8	10.3	9.4	13.5	47.4
RWANDA 	Tea, whether or not flavoured	8.0	9.6	31.4	15.2	107.1	171.3
	Wheat or Meslin Flour	28.7	28.1	31.7	39.0	39.3	166.8
	Rice	32.6	32.3	34.0	36.5	0.0	135.3
	Edible vegetables and certain roots and tubers	20.9	12.7	5.1	3.6	3.4	45.7
	Coffee	9.5	5.6	7.2	12.1	4.2	38.6
	Wheat Flour	9.1	10.3	9.2	4.8	9.1	42.5
	Coffee	7.2	7.2	5.9	9.1	7.8	37.2
	Tea, whether or not flavoured	6.5	5.3	4.4	4.9	6.0	27.0
	Edible fruit and nuts	0.5	0.5	1.2	0.2	0.5	3.0
DRC 	Cocoa beans, whole or broken, raw or roasted	0.2	3.8	4.2	6.8	6.8	21.8
	Coffee	1.1	0.6	0.6	1.6	2.7	6.6
	Edible vegetables and certain roots and tubers	0.1	0.0	0.1	0.0	0.4	0.7

Source: ITC

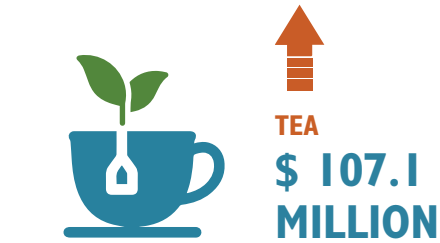
2.2.4 Uganda

Uganda's agricultural exports present a varied range, mainly coffee with a substantial value of USD 614.6 million over the period. Following closely was tea, both flavored and unflavored, making a significant contribution at USD 417.6 million, underscoring Uganda's influence in the global tea market. Dairy produce also played a notable role, totaling USD 417.2 million. Edible vegetables and certain roots and tubers were crucial contributors, amounting to USD 396.8 million. Additionally, dried leguminous vegetables contributed USD 317.5 million. While commodities like Rice, Maize or Corn and Grain Sorghum witnessed significant declines over the period, Coffee, Dairy Produce, and Edible Fruit and Nuts demonstrated substantial growth.



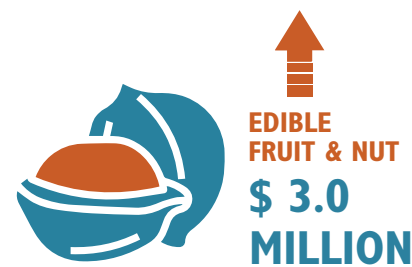
2.2.5 Rwanda

Rwanda's main agricultural exports over five years include tea, wheat flour and rice. Tea, whether flavored or not, experienced substantial growth from USD 8.0 million to USD 107.1 million, making a significant contribution to Rwanda's total export revenue. Wheat or Meslin Flour showed consistent growth, reaching USD 39.3 million, indicating sustained market demand. Conversely, edible vegetables and certain roots and tubers declined from USD 20.9 million to USD 3.4 million, reflecting market challenges. Coffee exhibited variability, decreasing from USD 9.5 million to USD 4.2 million in 2018 and 2022 respectively.



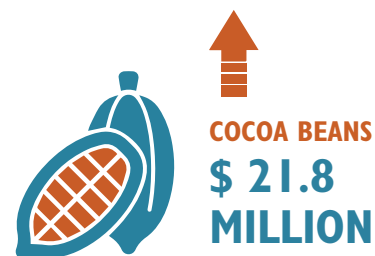
2.2.6 Burundi

Burundi's major agricultural exports included coffee at 37.2 million USD, tea at 27.0 million USD, and edible fruit and nuts at 3.0 million USD. However, it also exported significant amount of wheat flour totaling to a value of 42.5 million USD over the last five years. The export of coffee, a significant contributor to Burundi's economy, exhibited fluctuations but demonstrated a slight positive growth of approximately 4.17%, reaching a value of 37.2 million USD in 2022. Wheat flour exports experienced notable positive growth, increasing by approximately 66.67% over the same period, with the export value reaching 42.5 million USD in 2022. Conversely, Burundi's tea exports, whether flavored or not, faced a decline with a negative growth of approximately -24.62%, reaching an export value of 4.9 million USD in 2022. On a smaller scale, the export of edible fruit and nuts showed a significant growth of approximately 500%, reaching 3.0 million USD in 2022, highlighting emerging opportunities for these commodities in the export landscape.



2.2.7 Democratic Republic of the Congo

Democratic Republic of the Congo (DRC) is not considered a major agricultural exporter on the global stage. Despite its vast size and abundant natural resources, including fertile land, the DRC faces challenges that limit its agricultural productivity and export capabilities. Over a five-year period, a comprehensive analysis of the Democratic Republic of the Congo (DRC)'s primary agricultural commodity exports to Africa reveals that cocoa beans and coffee stand out as the main contributors, with an aggregate value of 21.8 million USD and 6.6 million USD, respectively. The export of coffee experienced an upward trajectory, growing from 1.1 million USD in 2018 to 6.6 million USD in 2022, representing a significant positive growth of approximately 500%. Edible vegetables and certain roots and tubers, though modest in export value, demonstrated a gradual increase, rising from 0.1 million USD in 2018 to 0.7 million USD in 2022. Meanwhile, the export of cocoa beans, whole or broken, showcased substantial growth, increasing from 0.2 million USD in 2018 to 21.8 million USD in 2022, indicating an impressive positive growth of around 10,800%.



2.3 Selected EAC and IGAD Partner States Agricultural Commodity Import Performance Trend with the rest of Africa.

2.3.1 Tanzania

In terms of agricultural imports, Tanzania's primary agricultural import was maize, with a significant value of USD 93.2 million over five years, underscoring its crucial role as a staple. The importation of edible fruits and nuts amounted to USD 15.8 million, while soybeans contributed USD 12.9 million. Other noteworthy agricultural imports from Africa included vegetables, primarily leguminous vegetables, contributing to more than half of Tanzania's edible vegetable imports from the continent. Groundnuts and wheat also made substantial contributions to the country's imports from Africa as shown in Table 3. A comparison between Tanzania's agricultural imports in 2018 and 2022 reveals notable changes. Maize imports surged by approximately 51.5%, growing from 20.4 million USD in 2018 to 30.9 million USD in 2022. Wheat and meslin imports declined, while grain sorghum imports remained stable at 0.0 million USD. Coffee imports showed a remarkable 100% growth, reaching 1.9 million USD in 2022. Edible fruit and nuts imports increased by about 63.2%, and edible vegetables and certain roots and tubers nearly doubled, experiencing a 200% growth. Soybeans imports saw a significant surge, marking a notable increase from 0.0 million USD in 2018 to 2.9 million USD in 2022. Groundnut imports demonstrated considerable growth, rising from 0.0 million USD in 2018 to 1.8 million USD in 2022.



2.3.2 Kenya

Over the past five years, Kenya's agricultural import values for various commodities have demonstrated noteworthy contributions to the country's overall import landscape. Cereals, including staples like maize and rice, have played a vital role, accumulating a substantial total five-year value of USD 807.9 million, underlining their critical position in addressing Kenya's food needs. Among the cereals, Maize or corn emerged as a major contributor with a total five-year value of USD 418.7 million while Rice imports also played a significant role, contributing USD 173.5 million. Despite fluctuations, grain sorghum imports totaled USD 57.7 million. Dairy produce imports have made a significant impact, contributing USD 462.6 million over the period, indicating a consistent demand for these products within the Kenyan market. Groundnut imports, though relatively modest, totaled USD 31.1 million. Edible fruit and nuts, with a total five-year value of USD 102.6 million, and edible vegetables and certain roots and tubers, contributing USD 72.3 million.

Examining Kenya's agricultural import figures from 2018 to 2022 reveals distinct trends, with certain commodities experiencing growth while others faced declines. Notably, cereal imports surged impressively by approximately 80.6%, reaching USD 250.7 million in 2022. Groundnut imports steadily grew by 50.0%, reaching USD 8.7 million in 2022. Maize or corn imports exhibited significant growth, soaring by approximately 67.5% from USD 118.2 million in 2018 to USD 197.5 million in 2022. Grain sorghum imports fluctuated but showed a remarkable growth of about 447.6%. In contrast, some commodities witnessed a decline in demand. Dairy produce saw a modest decline of approximately 8.2%, dropping from USD 100.9 million in 2018 to USD 92.6 million in 2022. Rice imports experienced a notable decline of around 71.3%, decreasing from USD 107.2 million in 2021 to USD 30.7 million in 2022.

Edible fruit and nuts faced a decline of approximately 10.8%, falling from USD 27.9 million in 2018 to USD 25.0 million in 2022. Edible vegetables and certain roots and tubers imports witnessed a substantial negative growth of approximately 81.4%, decreasing from USD 94.0 million in 2018 to USD 17.5 million in 2022.

2.3.3 Ethiopia

Over the past five years, Ethiopia's key imports included cereals, maize or corn, edible vegetables and certain roots and tubers, lentils, sunflower-seed or safflower oil and their fractions, edible fruit and nuts, and fresh or chilled onions and shallots. Ethiopia's top agricultural import commodities over the specified period is as follows: cereals totaling USD 98.3 million, maize or corn at USD 68.7 million, edible vegetables and certain roots and tubers accumulating USD 55.7 million, fresh or chilled onions and shallots reaching USD 47.5 million, sunflower-seed or safflower oil and their fractions totaling USD 30.0 million, lentils at USD 21.9 million and edible fruit and nuts contributing USD 13.4 million. Between 2018 and 2022, Ethiopia's import dynamics for specific commodities saw varying percentage changes. Sunflower-seed or safflower oil and their fractions experienced robust growth, with a percentage increase of approximately 122.2%. Edible fruit and nuts also displayed significant expansion, showing a remarkable percentage increase of about 221.4%. However, fresh or chilled onions and shallots substantially declined, with a percentage decrease of 91.9%. Cereals and maize or corn also experienced notable contractions, with percentage decreases of approximately 60.2% and 74.4%, respectively.

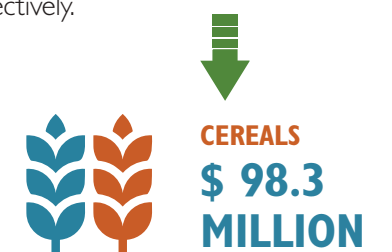


TABLE 3:
Intra-Africa Agricultural Commodity Imports by Member Country, 2018-2022 (US\$ million)

		2018	2019	2020	2021	2022	Total (5-yr)
TANZANIA 	Maize or corn	20.4	25.8	19.2	17.3	30.9	93.2
	Edible fruit and nuts	3.8	2.8	2.9	3.9	6.2	15.8
	Soya beans	0.0	0.0	1.3	8.7	2.9	12.9
	Edible vegetables and certain roots and tubers	0.8	1.2	1.6	3.4	2.4	8.6
	Groundnuts	0.0	0.0	4.0	0.5	1.8	6.4
	Wheat and meslin	0.1	4.9	0.0	0.3	0.1	5.3
	Coffee	0.0	0.1	0.0	1.1	1.9	3.1
	Grain sorghum	0.0	0.6	0.6	0.4	0.1	1.7
KENYA 	Cereals	139.0	96.7	80.8	240.6	250.7	807.9
	Dairy produce	100.9	132.9	65.8	70.4	92.6	462.6
	Maize or corn	118.2	60.0	38.1	123.1	197.5	418.7
	Rice	1.4	0.7	34.9	107.2	30.7	173.5
	Edible fruit and nuts	27.9	23.1	25.2	29.3	25.0	102.6
	Edible vegetables and certain roots and tubers	94.0	25.2	17.1	12.5	17.5	72.3
	Grain sorghum	10.5	34.3	4.2	2.7	16.5	57.7
	Groundnuts	5.8	7.4	6.9	8.0	8.7	31.1
ETHIOPIA 	Cereals	5.9	51.6	33.9	4.6	2.3	98.3
	Maize or corn	4.3	39.2	25.4	3.0	1.1	68.7
	Edible vegetables and certain roots and tubers	16.0	19.9	16.9	6.4	12.4	55.7
	Fresh or chilled onions and shallots	16.0	18.7	10.1	1.5	1.3	47.5
	Sunflower-seed or safflower oil and their fractions	2.7	6.2	10.1	5.1	6.0	30.0
	Lentils	0.0	0.7	6.2	4.2	10.8	21.9
	Edible fruit and nuts	1.4	2.2	2.9	3.8	4.5	13.4

Source: ITC

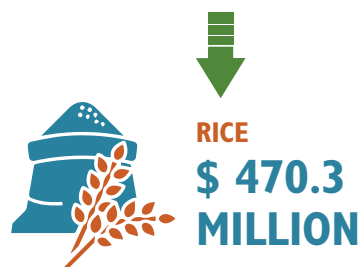
TABLE 3:
Intra-Africa Agricultural Commodity Imports by Member Country, 2018-2022 (US\$ million)

		2018	2019	2020	2021	2022	Total (5-yr)
UGANDA 	Cereals	35	36	85	244	175	575.0
	Rice	29.0	29.9	77.6	221.8	141.0	470.3
	Edible vegetables and certain roots and tubers	9.2	15.4	31.1	42.0	23.6	112.2
	Maize or corn	0.8	1.4	3.5	14.8	24.6	44.3
	Edible fruit and nuts	8.5	8.8	11.9	12.7	9.4	42.9
	Fish	9.2	12.4	12.1	6.0	3.0	42.7
	Barley	2.1	3.7	2.7	3.7	3.1	13.2
	Grain sorghum	2.5	0.4	0.6	3.1	3.3	7.3
RWANDA 	Cereals	56.7	41.1	73.7	79.6	83.4	334.5
	Rice	13.5	12.2	41.1	56.0	40.0	149.3
	Maize or corn	33.6	23.1	27.0	17.5	36.7	104.2
	Fish	17.6	14.9	13.3	13.0	11.8	70.6
	Groundnuts	0.0	9.2	12.8	13.2	19.7	54.9
	Grain sorghum	8.4	4.8	4.7	5.8	6.6	21.9
	Soya beans	0.6	1.5	0.9	6.9	11.5	21.5
	Edible fruit and nuts	7.5	6.0	4.3	7.7	12.5	30.5
BURUNDI 	Cereals	14.3	8.2	13.8	13.8	11.5	61.6
	Maize or corn	11.8	6.2	4.9	4.0	5.0	20.2
	Rice	2.0	1.2	4.8	7.0	4.4	17.4
	Fish and crustaceans, molluscs and other aquatic invertebrates	1.7	2.7	3.8	3.4	3.0	14.6
	Grain sorghum	0.0	0.4	3.2	2.7	2.0	8.4
	Edible vegetables and certain roots and tubers	4.3	2.2	1.8	2.9	1.3	8.1
	Edible fruit and nuts	0.1	0.1	0.1	0.2	0.2	0.7
DRC 	Fish	53.0	35.8	34.8	37.8	85.2	193.6
	Maize flour	5.6	1.1	2.7	3.6	12.6	20.0
	Wheat or meslin flour	3.6	4.6	4.4	3.6	5.3	18.0
	Edible vegetables and certain roots and tubers	1.7	1.2	1.4	4.4	10.8	17.9
	Edible fruit and nuts	2.4	2.7	2.1	3.9	3.5	12.2

Source: ITC

2.3.4 Uganda

A comprehensive analysis of Uganda shows that its **key imports are cereals, mainly rice (USD 470.3 million)**, edible vegetables (USD 112.2 million), maize (USD 44.3 million), and fish (USD 42.7 million). Notably, edible fruits (USD 42.9 million USD), mainly apples, citrus fruits, and grapes, are also among Uganda's significant imports. In summary, the imports of cereals (400%), rice (386%), maize or corn (2950%), grain sorghum (32%), and barley (48%) from Africa to Uganda have experienced significant growth. Edible vegetables and certain roots and tubers showed substantial growth (156%), while edible fruit and nuts experienced a slight increase (11%). However, fish imports declined significantly (67%).



2.3.5 Rwanda

The primary agricultural commodities imported to Rwanda from Africa during the five-year period from 2018 to 2022 include cereals, standing out as the predominant imported agricultural commodity, amassing a total volume of **USD 334.5 million**. Rice and maize or corn also play as a significant import under cereal category, with five-year totals reaching USD 149.3 million and USD 104.2 million, respectively. Fish and groundnuts contribute substantially to Rwanda's agricultural imports, with total volumes of USD 70.6 million and USD 54.9 million, respectively. The agricultural commodity imports to Rwanda from Africa exhibited diverse trends in value growth between 2018 and 2022. Soybeans and Rice experienced substantial growth, with percentage increases of approximately 1816.67% and

196.30%, respectively. On the other hand, Fish imports declined with approximately 32.95%, and Grain sorghum saw a decrease of approximately 21.43%.



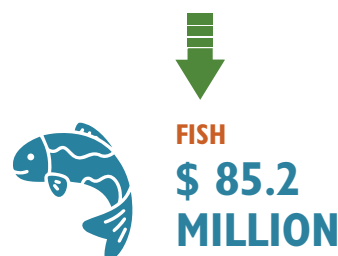
2.3.6 Burundi

Burundi's agricultural imports from Africa between 2018 and 2022 cover various commodities. Cereals, led by rice, maize, and sorghum, constitute a significant portion of these imports. **Cereals, as a whole, accumulated a total value of USD 61.6 million**, underscoring their crucial role in Burundi's food supply. Maize or corn had a total import value of USD 20.2 million while Rice imports total USD 17.4 million. Meanwhile, grain sorghum, with a total import value of USD 8.4 million, adds further diversity to the country's cereal imports. In addition to cereals, fish and aquatic invertebrates play a substantial role, with a total import value of USD 14.6 million, meeting Burundi's demand for aquatic food sources. While rice demonstrated substantial growth, maize or corn and certain vegetables experienced declines. Fish imports also saw a decrease, reflecting fluctuations in trade dynamics and potential shifts in consumption patterns.



2.3.7 Democratic Republic of Congo

Top agricultural imports to DRC from Africa are; fish, maize and wheat flour and edible vegetables mainly leguminous vegetables, onions and potatoes. Comparing the Democratic Republic of the Congo's (DRC) import data between 2018 and 2022 reveals noteworthy changes. **The import value of fish surged from USD 53.0 million in 2018 to USD 85.2 million in 2022**, reflecting an increased demand for fish products. The import of wheat or meslin flour and maize flour also witnessed significant growth over the same period. Additionally, there was a notable surge in the import of edible fruit and nuts, reaching USD 3.5 million in 2022 from USD 2.4 million in 2018. Similarly, edible vegetables and certain roots and tubers imports saw a substantial increase, climbing from USD 1.7 million in 2018 to USD 10.8 million in 2022.



2.4 Aggregate Agricultural Products Trade Balance by Country and Africa

The trade balance for agricultural products traded by various EAC and IGAD African countries from 2018 to 2022 reveals distinct patterns and economic dynamics as shown in figure 1 below:

a) Tanzania

Tanzania consistently maintained a positive trade balance in agricultural products over the five-year period, ranging from **USD 48.7 million in 2018 to USD 361.8 million in 2022**. This indicates a notable surplus in the value of agricultural exports compared to imports.

b) Kenya

Kenya's agricultural trade balance fluctuated, with negative values in 2018 and 2019 (**-24.3 million and -52.5 million, respectively**), turning positive in subsequent years. The highest surplus was recorded in 2020 at USD 272.3 million, reflecting an improvement in Kenya's trade position.

c) Ethiopia

Ethiopia's trade balance for agricultural products was consistently positive from 2018 to 2021, reaching its peak at **USD 345.9 million in 2018**. However, in 2022, Ethiopia experienced a deficit of USD 92.1 million.

d) Uganda

Uganda consistently maintained a positive agricultural trade balance, showcasing a surplus that increased over the years. **The highest surplus was recorded in 2018 at USD 822.6 million**, reflecting Uganda's strong position in agricultural exports.

e) Rwanda

Rwanda's trade balance for agricultural products fluctuated, with both positive and negative values. **The most significant deficit was observed in 2022 at USD 83.2 million**, suggesting challenges or changes in Rwanda's agricultural trade dynamics.

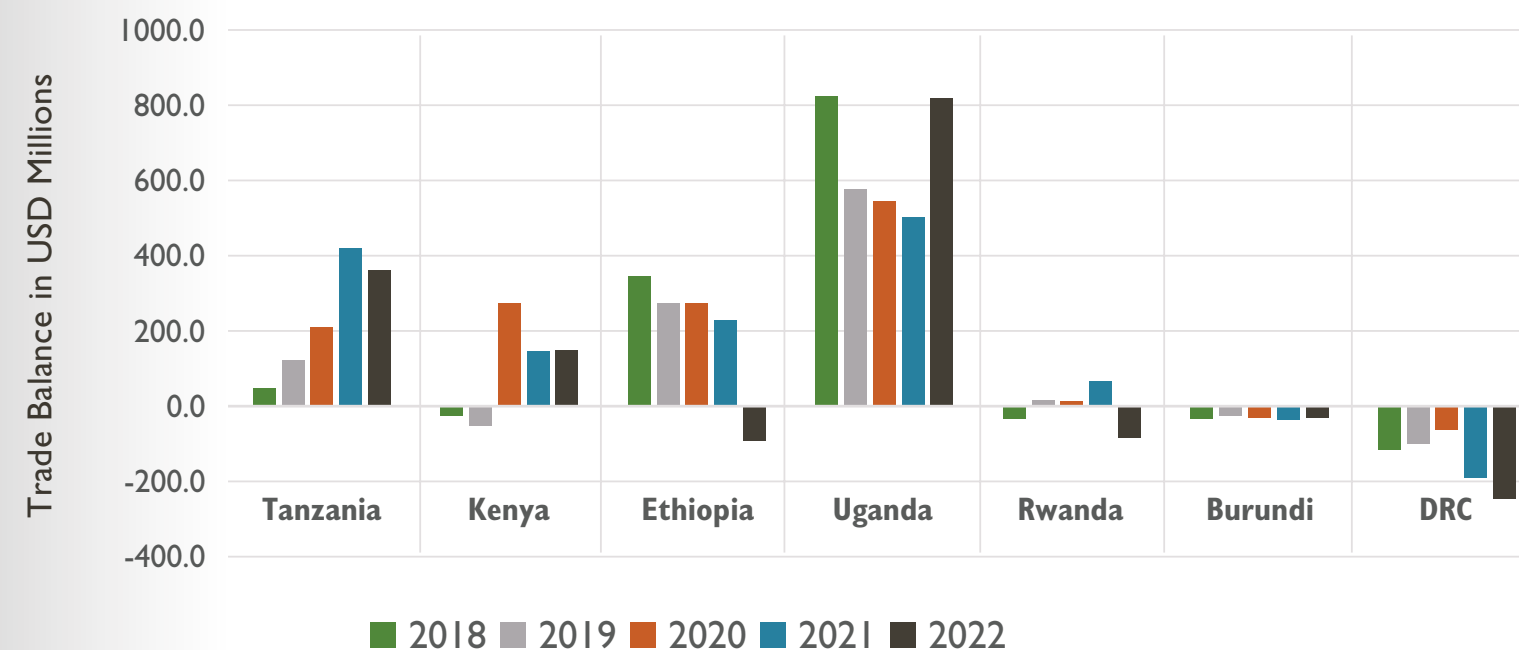
f) Burundi

Burundi consistently experienced a negative trade balance in agricultural products over the five years, indicating a deficit in the value of agricultural exports compared to imports.

g) Democratic Republic of the Congo (DRC)

The DRC consistently had a negative trade balance in agricultural products. **The deficit increased over the years, reaching USD 245.8 million in 2022**, highlighting challenges or imbalances in the DRC's agricultural sector.

FIGURE 1:
Aggregate Agricultural Products Trade Balance by Country and Africa





3 Main Market Destinations and Supplying Markets for Agricultural Commodities by Country

Tanzania

The main market destinations for Tanzania agricultural commodity exports by value are **Kenya (29.19 percent)**, **Uganda (25.5 percent)**, **Rwanda (13.9 percent)** and **DRC (12.6 percent)**. Maize accounts for more than 20 percent of agricultural exports to Kenya. In terms of Agricultural commodity imports, South Africa contributes to 24.2 percent of agricultural commodity imports to Tanzania while Kenya contributes to 19.8 percent, Zambia (17.3 percent) and Uganda (12.1 percent).

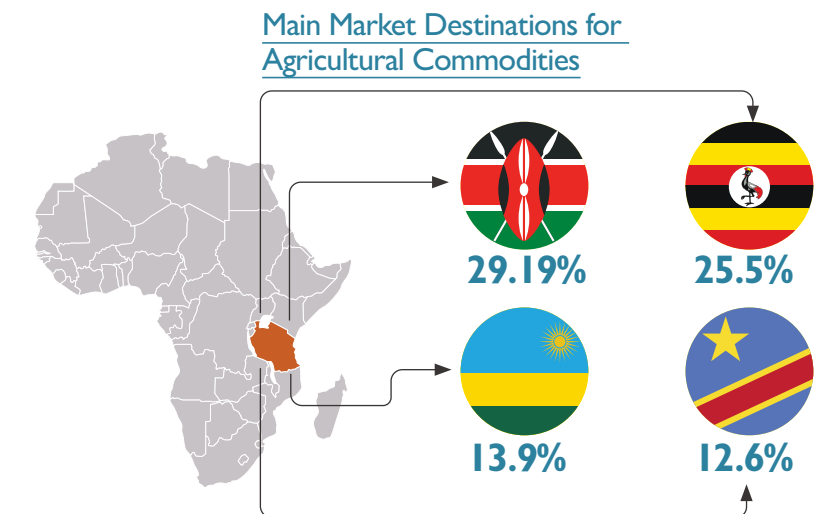


TABLE 4:

Tanzania's Agricultural Products Trade Flows (Five-Year-Value in USD Million)

	Partner	2018	2019	2020	2021	2022	Total
TOP MARKETS 	Africa Aggregation	216.0	268.5	368.9	647.0	627.4	2127.8
	Uganda	29.9	54.2	106.1	190.9	162.5	543.6
	Kenya	85.2	84.2	98.7	198.6	154.5	621.1
	Rwanda	12.3	18.8	50.2	98.4	115.5	295.1
	DRC	38.7	42.5	40.9	63.0	82.4	267.4
	Burundi	6.8	8.3	17.2	28.1	26.9	87.4
	South Africa	14.2	16.1	16.3	16.7	22.8	86.2
	Comoros	1.4	1.5	2.1	2.9	18.9	26.8
	Morocco	4.2	4.3	2.1	6.9	6.2	23.7
SUPPLYING MARKETS 	Africa Aggregation	167.2	147.8	158.2	228.0	265.6	966.9
	South Africa	41.3	40.0	41.2	49.2	62.3	233.9
	Kenya	27.3	24.7	33.0	48.8	57.7	191.5
	Zambia	28.4	22.0	23.0	42.8	51.0	167.3
	Uganda	10.5	11.2	24.9	32.6	37.6	116.8
	Malawi	15.6	20.1	19.8	19.0	20.0	94.5
	Egypt	14.4	8.7	3.1	9.4	10.3	46.0
	Namibia	7.0	6.5	4.4	5.5	6.5	29.9
	Zimbabwe	0.5	0.1	4.0	8.5	7.1	20.2
	Algeria	0.0	0.0	0.0	2.9	3.1	6.0

Source: ITC

TABLE 5:
Tanzania’s Top Agricultural Products Trade Flows by commodity 2018-2022

Commodity	Top Markets
Rice	Uganda, Rwanda, Kenya, Burundi, DRC, Malawi, Zambia, Comoros
Maize	Kenya, Rwanda, Uganda, Burundi, Malawi, DRC, Comoros, South Africa
Grain sorghum	Kenya, South Sudan, Burundi, Rwanda, Uganda, Malawi, Sudan
Wheat	Uganda, DRC, Rwanda, Sudan
Coffee	South Africa, Morocco, Kenya, Rwanda, Algeria, DRC, Egypt, Seychelles, Mozambique, Comoros, Uganda
Tea	Kenya, South Africa, Comoros, Egypt, Mali, Rwanda
Edible Fruits and nuts	DRC, South Africa., Egypt, Kenya, Uganda, Zambia, Comoros, Malawi
Cashew nuts	South Africa, Egypt, DRC, Kenya, Comoros, Zambia,
Bananas	Zambia, Kenya, Botswana, Comoros, DRC
Avocados	South Africa, Kenya, Comoros, Malawi, DRC ,Egypt, Nigeria
Groundnuts	Rwanda, Uganda, Burundi, South Africa ,Kenya
Soyabeans	Rwanda, DRC, South Africa, Uganda, Angola
Onions, shallots, garlic, leeks and other alliaceous vegetables	Uganda, Burundi, Kenya, DRC, Rwanda, Comoros

Source: ITC

Kenya

Kenya’s top agricultural commodities and products exports destinations are **Uganda (23 percent)**, **Egypt (20 percent)**, **Somalia (9.2 percent)** and **Rwanda (6.1 percent)**. Edible vegetables and certain roots and tubers contributes significantly (6.5 percent) of Kenya total agricultural exports to Uganda while tea is Kenya’s biggest agricultural commodity export to Egypt in terms of value at 94 percent of total Kenya’s agricultural exports to Egypt. Over the five years, Uganda, Tanzania, Egypt and South Africa contributed significantly to Kenyan agricultural imports from Africa.

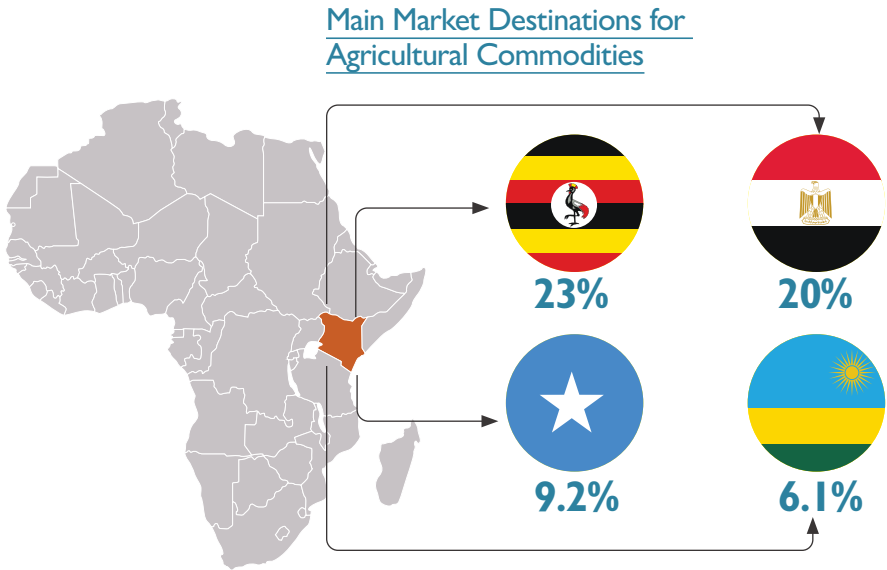


TABLE 6:
Kenya’s Agricultural Products Trade Flows (Five-Year-Value in USD Million)

	Partner	2018	2019	2020	2021	2022	Total
TOP MARKETS 	Africa Aggregation	777.3	764.9	892.8	1005.9	1067.6	4508.5
	Uganda	167.6	181.5	234.1	222.2	232.1	1037.6
	Egypt	178.8	175.1	166.0	183.6	216.0	919.5
	Somalia	94.8	77.4	72.1	78.2	92.4	414.9
	South Sudan	64.5	57.5	109.2	71.0	77.5	379.8
	DRC	53.4	44.3	48.2	121.3	58.7	325.8
	Sudan	54.6	51.3	70.2	55.9	58.6	290.6
	Rwanda	34.7	43.3	49.3	64.8	84.8	276.9
	Tanzania	35.3	30.5	37.1	64.6	67.6	235.2
	Ethiopia	7.0	6.8	8.0	32.1	41.6	95.5
SUPPLYING MARKETS 	Zambia	12.6	12.5	11.4	15.6	18.7	70.8
	Africa Aggregation	801.6	817.3	620.5	860.7	919.3	4,019.5
	Uganda	429.2	238.8	127.6	162.8	176.9	1,135.4
	Tanzania	65.6	114.8	118.2	300.5	260.6	859.6
	Egypt	72.7	102.9	83.7	103.7	100.8	463.8
	South Africa	61.2	61.3	68.2	67.2	69.5	327.3
	Mauritius	45.8	59.0	39.1	55.3	51.4	250.6
	Zambia	50.7	54.4	24.4	42.6	60.9	233.1
	Eswatini	7.9	35.9	24.4	31.4	14.9	114.6
	Malawi	13.3	31.6	26.6	14.5	16.3	102.3
	Rwanda	11.1	13.4	18.8	29.1	27.1	99.6
	Côte d'Ivoire	0.4	0.6	0.1	0.3	67.5	69.0

Source: ITC

TABLE 7:
Kenya top Markets by agricultural commodity 2018-2022

Commodity	Top Markets
Rice	DRC, Tanzania, United Republic of; South Sudan; Djibouti; Uganda; and South Africa.
Tea	Egypt, Sudan, Nigeria, Somalia, Côte d'Ivoire, Burkina Faso, Chad, South Africa, Ghana, and South Sudan
Coffee	Tunisia, Somalia, South Africa, Egypt, South Sudan, Tanzania, Djibouti, and Nigeria.
Edible vegetables and certain roots and tubers	Uganda, South Sudan, Ethiopia, South Africa, Somalia, DRC, Tanzania, Madagascar, and Rwanda.
Dried leguminous vegetables	Tanzania, United Republic of, Ethiopia, Uganda, Zimbabwe, South Africa, Malawi, Egypt, and Rwanda.
Cut flowers and flower buds	South Africa, Egypt, Algeria, Mauritius, Côte d'Ivoire, Angola, Cameroon, Seychelles, Ghana, and Nigeria.
Edible fruits and nuts	Egypt, Rwanda, Uganda, South Africa, South Sudan, Eswatini, Somalia, Libya and Tanzania

Source: ITC

Ethiopia

Ethiopia consistently depended on Somalia, with a total export value of USD 1430.5 million over the five years, comprising 61.62% of Ethiopia's total agricultural market. Djibouti maintained its position as the second-largest market, with a cumulative export value of USD 449.5 million, contributing 19.36%. Sudan, Kenya, and South Africa were also significant, with total export values of USD 210.53 million (9.07%), USD 71.54 million (3.08%) and USD 37.5million (1.61%) respectively. North African Countries such as Egypt, Libya, Morocco and Algeria also played roles in Ethiopia's agricultural markets, reflecting a diverse market distribution. Djibouti emerged as the predominant import supplier to Ethiopia agricultural commodities, experiencing an extraordinary surge from 0.18% in 2018 to a 47.42% in 2022 in value. This remarkable increase underscores Djibouti's growing significance as the primary contributor to Ethiopia's agricultural imports. Egypt, despite fluctuations, maintained a substantial share of 22.32% while South Africa contributing to 10.63% value of Ethiopia's agricultural imports. Kenya and Sudan played a noteworthy role with about 7.5% share each.

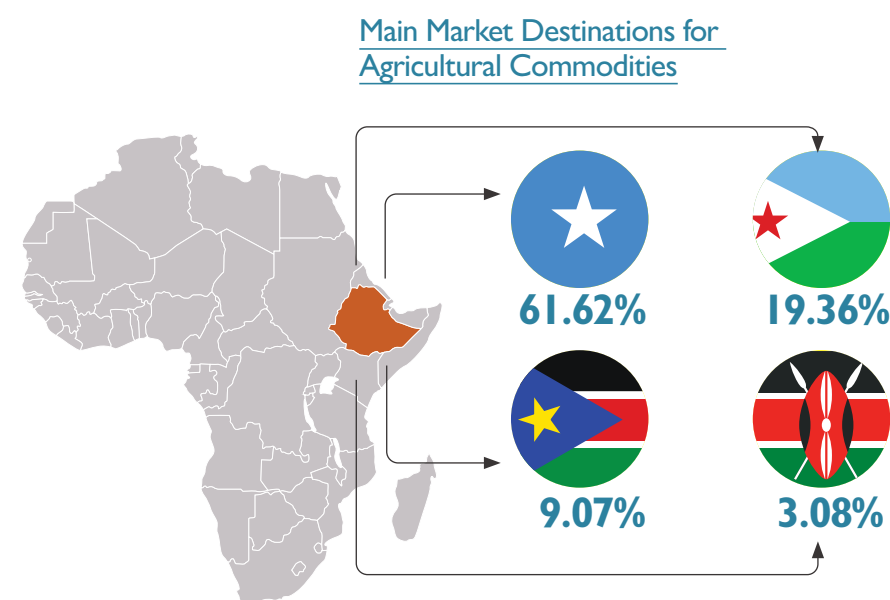


TABLE 8:
Ethiopia's Agricultural Products Trade Flows (Five-Year-Value in USD Million)

	Partner	2018	2019	2020	2021	2022	Total
TOP MARKETS 	Africa Aggregation	442.7	460.2	455.4	534.3	429.0	2321.6
	Somalia	255.0	264.9	289.2	358.5	262.9	1430.5
	Djibouti	90.1	91.3	92.7	94.8	80.6	449.5
	Sudan	51.8	42.4	40.2	33.1	43.1	210.5
	Kenya	13.2	20.9	7.6	7.9	22.0	71.5
	Egypt	12.8	21.6	6.4	6.8	2.7	50.2
	South Africa	9.9	6.9	5.7	7.8	7.1	37.5
	Nigeria	1.7	4.7	5.1	3.4	0.9	15.8
	Libya	0.9	0.5	3.1	5.0	2.7	12.2
	Algeria	1.5	2.2	0.9	2.5	0.8	7.9
	Morocco	0.5	0.2	1.9	1.8	1.7	6.0
	Sierra Leone	0.0	0.0	0.0	1.4	1.3	2.7
SUPPLYING MARKETS 	Africa Aggregation	96.8	187.9	182.9	305.4	521.1	1294.0
	Djibouti	0.2	23.3	52.5	186.2	351.5	613.6
	Egypt	54.5	65.2	49.2	49.0	70.8	288.8
	South Africa	15.2	51.5	44.0	14.4	12.5	137.6
	Sudan	21.7	39.8	25.8	4.4	6.6	98.2
	Kenya	4.3	5.9	7.7	25.8	53.9	97.6
	Rwanda	0.0	0.0	0.0	20.2	19.7	39.9
	Uganda	0.0	0.2	1.1	1.5	1.7	4.5
	Tanzania	0.0	0.6	1.0	0.2	0.7	2.5
	Madagascar	0.0	0.3	0.0	0.0	1.1	1.4
	Mauritius	0.0	0.0	0.0	0.0	1.0	1.0

Source: ITC

TABLE 9:
Ethiopia Top Markets by agricultural commodity 2018-2022

Commodity	Top Markets
Edible vegetables and certain roots and tubers	Somalia, Djibouti, Kenya, Sudan, Egypt South Africa, Sierra Leone, Morocco, Congo and Mozambique
Other Fresh or chilled vegetables	Somalia, Djibouti, Kenya, Sierra Leone, Madagascar.
Arrowroot, salep, Jerusalem artichokes and similar roots and tubers	Somalia, Djibouti
Dried leguminous vegetables	Kenya, Sudan, Egypt, South Africa, Djibouti, Morocco, Mozambique, Mauritius, Algeria, Somalia, and Angola
Potatoes	Somalia, Djibouti, Kenya
Coffee	Sudan, South Africa, Egypt, Morocco, Eswatini, Kenya , Algeria, Djibouti, Libya, Madagascar
Edible fruit and nuts	Somalia, Djibouti, Nigeria, South Africa and Seychelles

Source: ITC

Uganda

Kenya emerges as the most significant trading partner, consistently contributing to the majority share of Uganda agricultural commodity exports, with a five-year total of USD 1911.1 million, representing 38.3% of the Africa Aggregation total. South Sudan follows closely, accounting for 26.5% with a total of USD 1323.8 million, showcasing its substantial role in Uganda's export landscape. The Democratic Republic of the Congo, with a total of USD 609.7 million (12.2%), and Sudan, with USD 350.0 million (7.0%), are also significant contributors. On the hand, Tanzania emerges as a significant supplying market, consistently contributing and reaching a total of USD 675.7 million representing 39.2% of the total agricultural imports from Africa. Kenya contributes to 37.2% of the imports with a total of USD 640.3 million. Egypt and South Africa also play notable roles, contributing 8.6% and 6.9% of the imports, respectively, with total values of USD 148.1 million and USD 118.2 million over five years. Zambia, Morocco and Eswatini represent smaller yet noteworthy contributors, each making distinct contributions to the diversity of Uganda's agricultural imports.

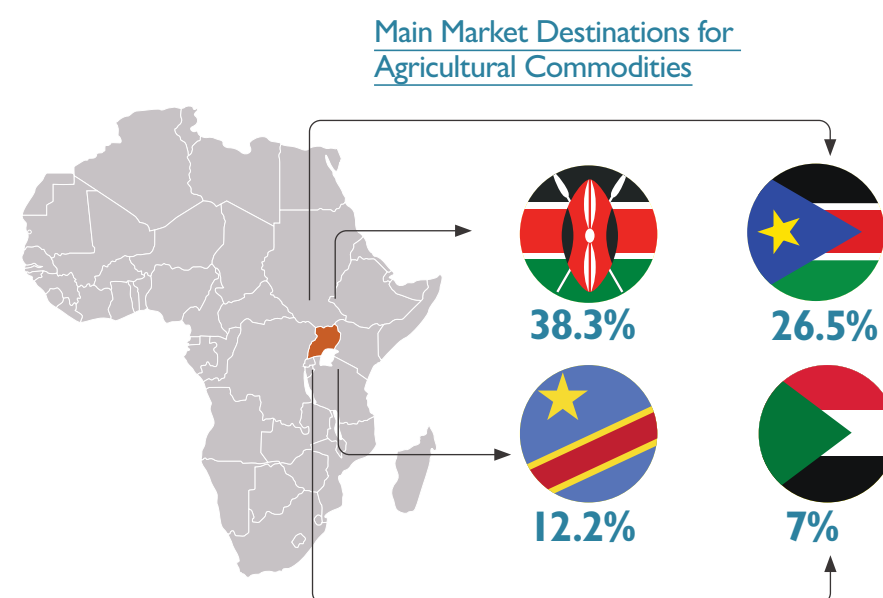


TABLE 10:
Uganda's Agricultural Products Trade Flows (Five-Year-Value in USD Million)

	Partner	2018	2019	2020	2021	2022	Total
TOP MARKETS 	Africa Aggregation	1048.2	807.7	855.3	1001.6	1274.6	4987.4
	Kenya	485.3	317.7	335.3	356.7	416.1	1911.1
	South Sudan	271.9	234.3	208.0	264.5	345.2	1323.8
	DRC	89.9	103.4	113.9	138.1	164.3	609.7
	Sudan	54.3	61.0	88.5	44.9	101.3	350.0
	Tanzania	15.6	23.9	40.7	33.5	45.7	159.4
	Rwanda	76.5	10.7	0.0	0.0	47.4	134.7
	Burundi	13.1	18.3	26.8	25.5	39.7	123.4
	Morocco	18.2	20.0	17.0	32.0	34.1	121.2
	Egypt	5.6	7.4	9.1	24.7	21.8	68.6
	Algeria	3.3	0.1	1.9	55.5	6.8	67.7
	South Africa	5.2	5.4	3.5	8.4	7.9	30.4
	Tunisia	0.0	0.0	0.0	0.9	26.2	27.1
SUPPLYING MARKETS 	Africa Aggregation	225.6	231.9	310.1	499.0	456.0	1722.7
	Tanzania	47.3	51.5	106.5	261.6	208.8	675.7
	Kenya	94.5	103.3	122.8	154.1	165.6	640.3
	Egypt	22.7	22.0	27.0	39.4	36.9	148.1
	South Africa	30.8	20.9	21.0	22.3	23.2	118.2
	Zambia	0.7	2.3	3.2	10.0	7.7	23.9
	Eswatini	7.7	6.1	3.4	2.7	2.3	22.3
	Rwanda	8.4	10.3	1.1	0.5	1.8	22.1
	Burundi	0.8	1.1	14.4	0.7	0.6	17.6
	Morocco	1.5	2.4	2.2	2.6	3.5	12.3
	DRC	1.3	2.1	3.7	0.4	1.8	9.2
	Mauritius	1.0	0.8	0.3	0.5	0.6	3.2

Source: ITC

TABLE 11:
Uganda Top Markets by agricultural commodity 2018-2022

Commodity	Top Markets
Rice	DRC, South Sudan and Kenya
Maize or corn	Kenya, South Sudan, Rwanda, Tanzania, Burundi and DRC
Grain sorghum	South Sudan, Kenya, Rwanda, Somalia, Tanzania, Burundi and DRC
Coffee	Sudan, Morocco, Algeria, Tunisia, South Africa, Egypt, Kenya, South Sudan, Madagascar, Ethiopia, Tanzania and Cabo Verde
Tea, whether or not flavoured	Kenya, South Sudan and DRC
Edible vegetables and certain roots and tubers	Kenya, South Sudan, Rwanda, Tanzania, DRC, Burundi, South Africa, Mauritius, Sudan, Somalia
Dried leguminous vegetables, shelled, whether or not skinned or split	Kenya, South Sudan, Rwanda, DRC, Burundi, Tanzania, South Africa, Mauritius, Sudan, Somalia
Dairy produce	Kenya, Egypt, South Sudan, DRC, Tanzania, Ethiopia, Malawi, Rwanda, Sudan, and Burundi
Edible fruit and nuts	Kenya, Rwanda, South Sudan, DRC and South Africa

Source: ITC

Rwanda

Rwanda's most significant trading partner is the **Democratic Republic of the Congo**, contributing **USD 816.4 million (62.9%)** share of exports, reflecting strong economic ties. Over the span of five years, **Kenya has emerged as Rwanda's second-largest export market**, experiencing a significant surge from **USD 8.9 million in 2018 to USD 115.0 million in 2022**. This growth accumulates to a total of **USD 177.9 million**, representing a **13.7% share of the agricultural market** during this period. Ethiopia and South Sudan also show substantial shares, contributing **USD 45.1 million (3.5%)** and **USD 56.7 million (4.4%)** of exports respectively. Other markets like Uganda, Burkina Faso, and Nigeria make significant contributions as well, showcasing Rwanda's diversified trade relations within the African continent. Tanzania, emerges as the primary supplying market, contributing **USD 526.9 million (39.9% share)** of the agricultural imports to Rwanda over the five years. Similarly, Kenya contributes to **USD 238.2 million (18.0% share)** while Uganda contributes **USD 153.2 million (11.6% share)**, showcasing the significance of these neighboring East African countries in Rwanda's supply chain. Egypt also plays a notable role, supplying agricultural commodities worth **USD 88.0 million (6.7% share)**, demonstrating Rwanda's engagement with North African markets. Zambia, Eswatini, and Malawi contribute **USD 99.1 million (7.5%)**, **USD 24.1 million (1.8%)** and **USD 85.6 million (6.5%)**, respectively.

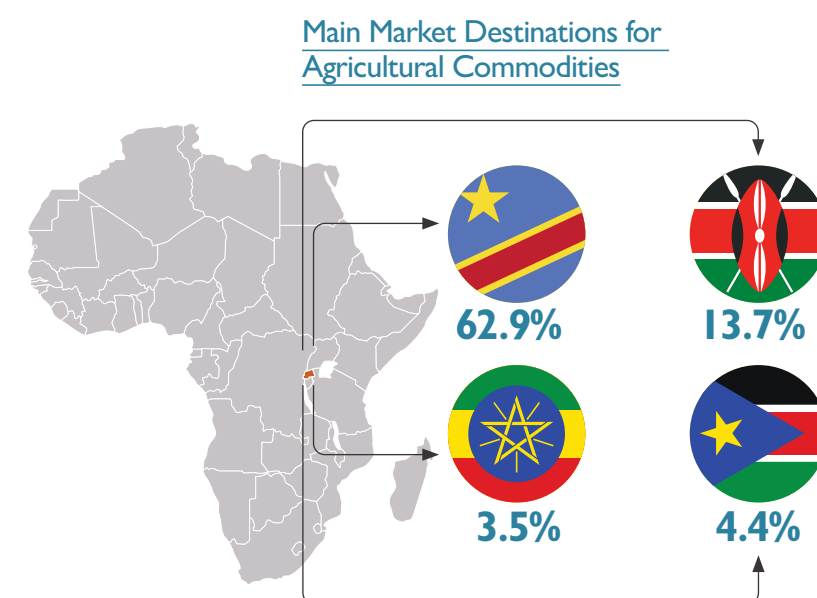


TABLE 12:
Rwanda's Agricultural Products Trade Flows (Five-Year-Value in USD Million)

	Partner	2018	2019	2020	2021	2022	Total
TOP MARKETS 	Africa Aggregation	221.1	223.6	245.5	360.2	246.9	1297.4
	DRC	148.8	147.8	171.0	267.0	81.9	816.4
	Kenya	8.9	5.4	25.9	22.7	115.0	177.9
	Uganda	45.0	26.9	20.6	23.2	0.3	116.0
	South Sudan	1.6	19.5	10.5	7.0	18.0	56.7
	Ethiopia	0.0	0.0	0.0	19.1	26.0	45.1
	Burundi	7.3	9.8	0.2	0.0	0.1	17.3
	Sudan	3.5	2.9	4.6	3.4	0.1	14.6
	Tanzania	1.0	2.2	0.7	2.4	0.7	6.9
	South Africa	0.3	0.3	0.6	0.5	2.0	3.6
	Somalia	0.0	1.6	0.1	0.7	0.4	2.9
	Nigeria	0.1	0.1	0.0	0.9	0.6	1.7
	Niger	0.0	0.0	0.0	0.3	0.5	0.7
	Burkina Faso	0.0	0.0	0.0	0.0	0.7	0.7
SUPPLYING MARKETS 	Africa Aggregation	255.1	207.3	232.9	294.7	330.1	1320.2
	Tanzania	48.1	82.9	116.0	138.8	141.1	526.9
	Kenya	32.9	45.2	49.3	54.1	56.6	238.2
	Uganda	104.9	14.5	0.1	0.0	33.8	153.2
	Zambia	32.0	19.5	15.9	8.3	23.4	99.1
	Egypt	7.0	11.4	16.6	25.9	27.2	88.0
	Malawi	1.7	13.5	14.1	43.0	13.3	85.6
	South Africa	9.0	3.6	5.9	4.7	6.2	29.4
	DRC	4.1	4.7	4.1	5.3	8.3	26.5
	Mozambique	8.4	9.1	4.0	3.0	0.7	25.3
	Eswatini	0.2	0.2	3.1	6.2	14.4	24.1
	Morocco	1.6	1.9	2.4	2.5	0.2	8.6
	Mauritius	1.0	0.1	0.1	0.1	3.0	4.3
	Zimbabwe	0.3	0.0	0.7	0.2	1.7	2.8

Source: ITC

TABLE 13:
Rwanda Top Markets by agricultural commodity 2018-2022

Commodity	Top Markets
Edible vegetables and certain roots and tubers	Congo, DRC, South Sudan; Uganda, Kenya, Nigeria, Tanzania and Burundi
Wheat or Meslin Flour	DRC
Tea, whether or not flavoured	Kenya, Egypt, Sudan
Coffee	Kenya, South Sudan, Uganda, Tanzania, Eswatini
Rice	DRC, South Sudan, Uganda
Dairy produce	DRC, Uganda, South Sudan and Kenya

Source: ITC

Burundi

Burundi's primary market for agricultural exports is the **Democratic Republic of the Congo (DRC)**, accounting for **39.7%** of Burundi's total agricultural-related exports, followed by **Egypt (14.7%)** and **Sudan (13.9%)** in the five-year period. Other notable markets include **Tanzania (8.6%)**, **Mauritius (2.6%)**, **Uganda (8.2%)**, **Zambia (2.9%)**, **Kenya (6.4%)**, **Somalia (0.2%)** and **South Africa (0.3%)**. Among the supplying markets within Africa, Uganda is the largest contributor, constituting 27.0% of Burundi's agricultural imports. Tanzania accounted for 22.0% of the total in the period under review. Kenya, with a share of 15.1%, and Egypt, contributing 6.8%, also play substantial roles in meeting Burundi's agricultural import demands. Zambia, Eswatini, Zimbabwe, Malawi, the Democratic Republic of the Congo (DRC), and South Africa collectively contribute to diverse sources for Burundi's agricultural imports.

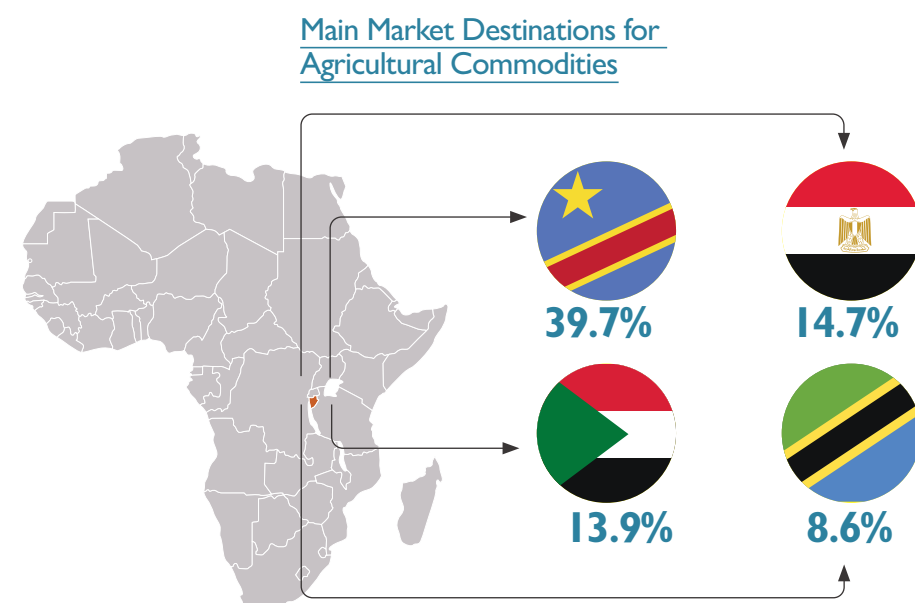


TABLE 14:
Burundi's Agricultural Products Trade Flows (Five-Year-Value in USD Million)

	Partner	2018	2019	2020	2021	2022	Total
TOP MARKETS 	Africa Aggregation	34.6	32.4	38.5	33.5	43.9	182.9
	DRC	14.9	13.4	14.0	11.8	18.5	72.7
	Egypt	6.5	5.3	4.4	4.8	6.0	26.9
	Sudan	2.7	2.9	6.1	5.1	8.7	25.4
	Tanzania	1.1	1.9	6.3	3.0	3.5	15.7
	Uganda	3.8	5.8	1.6	1.8	2.1	15.1
	Kenya	2.2	0.8	3.9	4.0	0.8	11.7
	Zambia	1.1	1.1	1.1	1.0	1.0	5.3
	Mauritius	0.4	0.3	1.0	0.6	2.5	4.8
	South Africa	0.1	0.1	0.0	0.2	0.2	0.6
	Somalia	0.0	0.0	0.0	0.0	0.4	0.4
SUPPLYING MARKETS 	Africa Aggregation	67.6	56.8	69.7	68.2	73.5	335.8
	Uganda	13.0	10.1	19.0	18.1	30.5	90.7
	Tanzania	17.9	10.1	14.1	17.4	14.3	73.8
	Kenya	7.8	11.6	9.5	11.4	10.3	50.7
	Zambia	14.1	8.6	7.9	6.0	4.3	40.9
	Egypt	1.5	2.6	4.7	8.5	5.4	22.7
	Malawi	0.0	0.0	9.1	3.6	1.3	14.1
	DRC	3.1	1.6	0.6	1.3	1.2	7.8
	South Africa	0.5	3.3	1.5	1.3	0.8	7.5
	Eswatini	0.0	0.1	0.7	0.0	2.6	3.4
	Zimbabwe	0.0	0.0	0.0	0.0	1.5	1.5

Source: ITC

TABLE 15:
Burundi Top Markets by Agricultural Commodity 2018-2022

Commodity	Top Markets
Coffee	Mauritius, Tanzania, Uganda, Kenya, Sudan, South Africa, Seychelles and Mauritania
Wheat Flour	DRC
Tea, whether or not flavoured	Egypt, Tanzania
Edible fruit and nuts	Tanzania, DRC

Source: ITC

Democratic Republic of the Congo (DRC)

Over the five-year period from 2018 to 2022, the Democratic Republic of the Congo (DRC) experienced an increase in its agricultural export destinations to Africa. The total export value increased significantly, with a 211.1% rise from USD 9.9 million in 2018 to USD 30.8 million in 2022. **Uganda emerged as the dominant market, accounting for 48.75% of the DRC's total exports over the five-year period.** Other top markets for DRCs agricultural exports are **Morocco and Madagascar contributing to 15.56% and 5.9% respectively while Kenya contributed to 5.56 % of total DRCs exports over the five-year period.** DRC exports mainly Coffee and Bran, sharps and other residues of wheat to Morocco. On the other hand, the Democratic Republic of the Congo (DRC) relies on diverse African markets for agricultural imports, with South Africa holding the largest share (32.07%), followed by Kenya (20.00%) and Tanzania (12.23%). Noteworthy contributors to DRCs imports include Angola (6.53%), Uganda (9.07%) and Zambia (7.39%). These nations play vital roles in supplying mainly processed agricultural products such as maize and wheat flour, fruit juices, food preparations and fresh commodities such as fruits to DRC

TABLE 16:
DRC's Agricultural Products Trade Flows (Five-Year-Value in USD Million)

	Partner	2018	2019	2020	2021	2022	Total
TOP MARKETS 	Africa Aggregation	9.9	14.5	16.5	16.4	30.8	88.0
	Uganda	3.5	8.7	9.2	10.1	11.4	42.9
	Morocco	2.9	4.0	4.6	1.3	1.0	13.7
	Madagascar	0.0	0.0	0.9	2.0	2.3	5.2
	Kenya	0.1	0.0	0.2	0.6	4.0	4.9
	Burundi	0.1	0.1	0.4	0.0	4.0	4.6
	Eswatini	0.4	0.1	0.0	1.3	2.5	4.3
	Senegal	0.0	0.3	0.0	0.3	1.3	1.9
SUPPLYING MARKETS 	Africa Aggregation	125.9	113.9	77.9	206.9	276.6	801.1
	South Africa	38.7	49.6	26.2	88.5	53.9	256.9
	Kenya	29.5	20.4	4.8	48.7	56.8	160.2
	Tanzania	17.0	10.0	2.8	25.9	42.3	98.0
	Uganda	8.6	10.0	15.4	12.7	25.9	72.6
	Zambia	11.7	7.1	11.6	12.4	16.4	59.2
	Angola	3.0	1.1	1.9	2.3	44.0	52.3
	Morocco	7.5	6.3	5.5	4.0	5.9	29.1
	Rwanda	3.0	2.0	2.5	3.6	9.2	20.3
	Egypt	1.9	0.7	2.3	1.8	4.0	10.7
	Cameroon	0.2	0.3	0.1	2.2	7.6	10.3
	Eswatini	0.6	0.9	2.0	0.9	1.7	6.2

Source: ITC

**Main Market Destinations for
Agricultural Commodities**

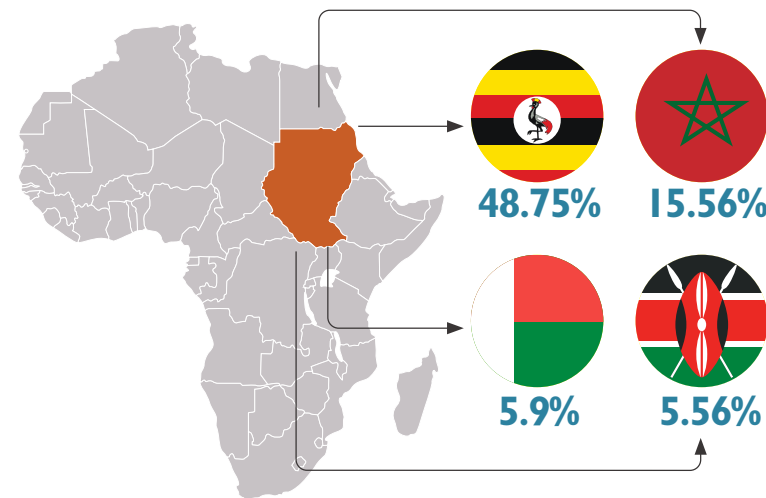


TABLE 17:
DRC Top Markets by Agricultural Commodity 2018-2022

Commodity	Top Markets
Coffee	Eswatini, Kenya, Rwanda, Morocco, South Africa, DRC and Uganda
Edible vegetables and certain roots and tubers	Kenya, Uganda and Rwanda
Cocoa beans, whole or broken, raw or roasted	Uganda, Eswatini, Kenya

Source: ITC



4 Conclusion

4.1 Agricultural Commodity and Products Trade

i. Diverse Export Portfolios

The selected countries within EAC and IGAD exhibit diverse agricultural export portfolios. In Tanzania, rice emerges as the top export, with substantial contributions from maize, vegetables, tea, and coffee. Kenya's top exports include tea, rice, maize, edible vegetables, and cut flowers. Ethiopia showcases a strong position in the African agricultural market with significant exports of edible vegetables, roots, tubers, and other Fresh or chilled vegetables. Uganda's top agricultural exports range from coffee and tea to dairy produce and edible vegetables. Rwanda exports are mainly tea, wheat flour, and rice, while Burundi relies on coffee, tea, and wheat flour as its exports. The Democratic Republic of the Congo primarily exports cocoa beans and coffee in small values.

ii. Export Growth and Challenges

Several countries experience significant export growth in specific commodities. Tanzania observes remarkable export growth in groundnuts, soybeans, and rice. Kenya realizes notable percentage changes in exports of grain sorghum, maize, rice, and coffee. Ethiopia demonstrates growth in the export of diverse products like arrowroot, fresh vegetables, and leguminous vegetables. Uganda stands out in the global tea market, with substantial growth in Coffee, Dairy Produce, and Edible Fruit and Nuts. Rwanda experiences growth in tea and wheat flour exports. Burundi shows positive growth in coffee and wheat flour exports. Despite its challenges, the Democratic Republic of the

Congo displays positive growth in coffee and cocoa bean exports.

iii. Sector-Specific Trends

Each country has unique sector-specific trends. For example, Tanzania and Kenya are prominent in tea exports, Ethiopia excels in supplying fresh produce, Uganda is influential in the global tea market, Rwanda sees growth in tea and wheat flour, Burundi is prominent on coffee and wheat flour, and the Democratic Republic of the Congo demonstrates positive growth in cocoa beans and coffee. These trends underscore the specialization and varying strengths within the agricultural sectors of these countries.

iv. Critical Importance of Staple Commodities

Maize, cereals, and rice emerge as critical imports, underscoring their significance in addressing food needs and ensuring food security within the region. These staple commodities play a central role in meeting the dietary requirements of several countries.

v. Dynamic Import Trends

The import landscape exhibits dynamic trends, with certain commodities experiencing significant growth, such as coffee, soybeans, and edible vegetables. At the same time, fluctuations and declines are observed in the imports of dairy produce, rice, and certain fruits.

vi. Country-Specific Economic Positions

Each country showcases unique economic positions, with specific nations demonstrating strengths in importing particular commodities. For instance, Ethiopia stands out in the importation of sunflower-seed or safflower oil and edible fruit and nuts.



4.2 Agricultural Commodity and Products Trade Surplus and Deficits

Tanzania consistently demonstrated a surplus in agricultural commodities and products, indicating a robust trade position with a steady increase over the five-year period. Kenya experienced fluctuations but ultimately achieved a positive trade balance, showcasing resilience and improvements. Ethiopia, although consistently positive until 2021, faced a deficit in 2022, signaling a shift in its agricultural trade dynamics. Uganda maintained a positive balance, emphasizing its strength in agricultural exports. Rwanda faced fluctuations, with a notable deficit in 2022, suggesting evolving challenges. Burundi consistently had a negative trade balance, indicating ongoing deficits in agricultural trade. Similarly, the Democratic Republic of the Congo consistently grappled with a negative balance, escalating over the

years, emphasizing challenges or imbalances in its agricultural trade landscape.

It is crucial to highlight that policy and trade regulations, such as tariffs and trade barriers, can impede the flow of agricultural commodities. The imposition of such measures by surplus or deficit countries in addition to political stability or conflicts and infrastructure and logistics are some of the factors that may affect the movement of agricultural commodities from surplus to deficit countries.

4.3 Agricultural Commodity and Products Destination and Source Markets

Several common trends and themes emerge from the agricultural trade flows of these countries:

i. Regional Focus

All the countries place significant emphasis on intra-regional trade within Africa. The majority of their top trading partners for agricultural commodities are neighboring countries or those within their respective regions.

ii. Interconnected Supply Chains

The agricultural trade networks among these countries are interconnected. For instance, Uganda emerges as a significant trading partner for Kenya, Rwanda, and Burundi, emphasizing the importance of bilateral trade relationships in the East African region.

iii. Diverse Trading Partnerships

While regional trade is essential, these countries also engage with a diverse set of partners across the continent. For instance, Egypt and South Africa are notable trade partners for several East African countries, showcasing diversified market engagement. Belonging to common Regional Economic Communities such as COMESA and SADC could be a factor due to presence of preferential tariffs.

iv. Dependency on Specific Markets

Certain countries, like Ethiopia relying significantly on Somalia for agricultural imports, showcase the importance of specific trading partners. This dependence also underscores the vulnerability to disruptions in these trade relationships.



5 Policy Recommendations

i. Harmonization of Trade Policies

The EAC and IGAD member states should work towards harmonizing trade policies, particularly in the agricultural sector. Aligning rules and regulations would facilitate smoother cross-border trade, reduce non-tariff barriers, and promote a more integrated regional market.

i. Infrastructure Development: Addressing challenges related to inadequate infrastructure is crucial. Investing in transportation, storage facilities, and border-crossing infrastructure will help streamline the movement of agricultural commodities, reducing trade costs and delays.

ii. Capacity Building

Enhance the capacity of farmers, producers, and other stakeholders in the agricultural value chain. Providing training on best practices, quality standards, and modern farming techniques can improve the quality and quantity of agricultural products, making them more competitive in regional and international markets.

iii. Diversification of Exports

While certain countries show strengths in specific agricultural commodities, encouraging diversification can reduce dependency on a limited set of products. This involves supporting farmers to explore new crops, promoting value addition, and expanding the range of exported goods.

iv. Addressing Trade Imbalances

Countries with persistent trade deficits, such as Burundi and the Democratic Republic of the Congo, should develop strategies to enhance their agricultural production capacities. This may involve investments in research and development, technology adoption, and the creation of incentives for agricultural innovation.

v. Market Access:

Enhance efforts to improve market access for agricultural products within the regions and beyond. This includes negotiating trade agreements that facilitate easier access to international markets, thereby expanding opportunities for agricultural exports.

vi. Climate Resilience:

Given the sensitivity of agriculture to climate change, implementing strategies to enhance climate resilience in the agricultural sector is vital. This may involve promoting sustainable agricultural practices, water management, and the development of climate-resilient crop varieties.

vii. Data Sharing and Analysis:

Establish mechanisms for regular data sharing and analysis among member states. This includes information on market trends, production capacities, and emerging challenges. A collaborative approach to data-driven decision-making can foster better-informed policies.

viii. Continued Regional Integration:

Strengthen the commitment to regional integration efforts, acknowledging the interconnectedness of agricultural trade networks. The establishment of common standards, mutual recognition of certifications, and shared research initiatives can contribute to a more cohesive regional agricultural landscape.



