Helpdesk Report

Knowledge, evidence and learning for development

Approaches to promoting intra-regional trade in staple foods in sub-Saharan Africa

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Question

What approaches have been effective in promoting intra-regional trade in staple foods in sub-Saharan Africa? A particular concern is reducing government interference in markets for staple crops.

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Overview

Intra-regional trade in sub-Saharan Africa (SSA) is significantly lower than its potential. This is particularly true for key staple foods, which are important for development and the alleviation of poverty. The missed opportunities for the development of private sector and specifically staple food cross-border trade are due to the existence of numerous trade barriers, which vary across countries and evolve rapidly, sometimes unpredictably, with time. Policy makers are aware of the existence of these barriers, some of which are gender-specific. The majority of current policies are oriented towards regional liberalisation and integration; however, their implementation on the ground is slow and inconsistent. The key issues concern the predictability of trade policies and the *de facto* implementation of agreements. The most successful initiatives combine (i) consultation with and commitment from a large variety of actors, including government officials, civil society, small businesses, and often including external partnerships; (ii) investment in infrastructure and facilitation of the business environment; and (iii) improvement of relationships between officials and tradespeople.

Regional trade is crucial for development of SSA countries. SSA's agricultural resources are not allocated equally across or within countries; the region has traditional areas of food deficit and food surplus which are artificially demarcated by national borders. On average, the demand for staple goods is much higher than its supply in the SSA region. Given population growth and increased urbanisation, Africa's demand for food staples will continue to increase: hence a need to increase farmers' contributions to meet regional demand (World Bank, 2012). An approach to food security based on *national* self-sufficiency cannot work.

However, only a few SSA countries actively participate in intra-regional trade by exporting staple goods to other SAA countries; the largest share of staple foods comes from outside the region. Particularly for staple foods, regional trade is underdeveloped: only 5% of SSA's imports of cereals come from other SSA countries (World Bank, 2012). Because of volatility in the price of staples in many SSA countries (especially in land-locked countries), governments empower agencies to intervene in agricultural markets to stabilise prices. These interventions discourage intra-regional trade in many cases (World Bank, 2012).

Despite commitments (e.g. regional integration arrangements and regional trade agreements) to opening up regional trade in food, implementation has generally been weak and governments continue to restrict trade by maintaining tariff and non-tariff barriers and other constraints. The persistence of barriers to food trade in SSA can be also explained by a lack of credible commitment between the government and private sector, the disproportionately strong role of anti-reform lobby groups and the difficulties farmers encounter in engaging in collective action (Engel et al., 2013). Nonetheless, the overall current trend is oriented towards regional integration and development of the private sector in the staple food market.

There is a consensus in the literature reviewed for this report that while trade liberalisation is not a panacea, intra-regional trade in SSA should be facilitated. This can be done in partnership with private sector by supporting staple food trade chains. Disseminating information, training cross-border traders, and reducing government interference in price formation are key recommendations in the literature. Numerous trade-promotion initiatives take place on different levels, some targeting small-scale cross border trade and often facilitating, promoting and developing informal trading by women as key ingredients of success.

A large majority of the initiatives identified in this research are supported by international organisations and development agencies in partnership with the private sector. These initiatives facilitate trade by addressing the physical needs of traders, implementing more automated and clear processes, and improving the general regulatory environment. Several initiatives are specific to particular sectors or needs, such as transport initiatives, women-focused initiatives, phytosanitary requirements, and improvement of border posts.

In addition to the usual difficulties of accessing reliable information on informal activities (which play a large role in cross-border trade) and the difficulty of interpreting case studies as being representative of a very heterogeneous region, this review has the following explicit limitations:

- The lack of consideration of the exchange rates and monetary policies of SSA countries. The existence of multiple currencies is not facilitating the cross-border and regional trade; engendering transaction costs and adding to the volatility element.

- The lack of consideration of the impact of the limited access to finance, particularly for female traders.
- The "success bias", when successful initiatives are (at least partially) reported and possibly exaggerated, but the failed ones are omitted from the literature: this does not allow for a comprehensive analysis of key characteristics.
- The scope of the review does not permit a detailed investigation of selected successful initiatives; sometimes documents internal to the international organisations are not readily available.

1. Intra-regional trade in staple foods in sub-Saharan Africa (SSA)

Significant intra-regional trade opportunities in SSA countries remain unexploited, especially in agriculture. This may be explained by several factors:

- A mismatch in staple trade between the supply side (i.e. what SSA countries produce) and the demand side (i.e. what they consume);
- A lack of infrastructure and transport facilities and a continued dependence on traditional trade partners (UNCTAD, 2013);
- Trade barriers, including institutional and political barriers.

Existing trade patterns

Intra-regional trade in sub-Saharan Africa remains consistently low compared with intercontinental trade (Economic Commission for Africa, 2010). Continent-wide, more than 80 percent of Africa's exports are destined for outside markets, with the European Union (EU) and the United States accounting for more than 50 percent of this total.

Analysing trade flows within SSA is quite challenging since a non-negligible amount of trade occurs informally and therefore is not recorded in the usual databases, and when it is recorded, data are often incomplete and inconsistent. For instance, Josserand (2013) has found that official trade statistics of staple foods probably capture on average only about one-third of actual transactions by value.

The growth in volume of SSA intra-regional food trade progresses more slowly than trade outside the continent (Chauvin et al., 2012). The majority of intra-regional trade in basic/most used goods (but also in other goods) occurs in simple informal cross-border deals that often involve female traders traveling from one country to another to buy goods to sell in market stalls. These movements include simple cross-border transactions between extended family and tribe members as well as transactions along traditional corridors that sometimes extend over thousands of kilometres and multiple border posts (Keyser, 2012). Staple goods traded via informal channels vary from very small quantities moved by bicycle to large volumes trucked over long distances.

Larger-scale informal trade routes can be observed from surplus food zones into deficit food areas. For instance, with just 9.3 percent of total land classified as arable, Kenya suffers from a structural deficit in staple food (mostly in maize) and relies in most years on informal imports from Uganda and Tanzania. Southern Malawi is another example of a chronically deficient food zone that depends in most years on maize from northern Mozambique and eastern Zambia (Keyser, 2012).

According to the Food Security and Nutrition Working Group (FSNWG)[1] the total volume of informal trade between 11 eastern Africa countries, maize grain was the most informally traded commodity in Eastern Africa (from July 2016 to June 2017 approximately 339,000 metric tons (MT) of maize is sold through informal channels), following by rice (about 127,000 MT), sorghum (110,000 MT) and dry beans (107,000 MT). In the fourth quarter of 2016 maize grain represented 31 percent of informally traded commodity in Eastern Africa, followed by rice (19 percent), wheat and flour (14 percent), dry beans (12 percent), sorghum (9 percent), sugar (8 percent), sesame seeds (7 percent), (FSNWG, 2017).

Regional cooperation

There is much support from SSA governments for regional integration. Since independence, they have embraced regional integration as an important component of their development strategies (Hartzenberg, 2011) and have concluded many regional integration arrangements (RIAs) and regional trade agreements (RTAs).

At a larger scale, multiple regional blocs, so-called Regional Economic Communities (RECs) were created. These are primarily trade blocs (including in some cases political and military cooperation), several of which have significant membership overlap. The major RECs in SSA:

- the Common Market for Eastern and Southern Africa (COMESA);
- the East African Community (EAC);
- the Economic Community of West African States (ECOWAS);
- the Economic Community of Central African States (ECCAS);
- the Community of Sahel-Saharan States (CEN-SAD);
- the Southern African Development Community (SADC);
- the Intergovernmental Authority on Development (IGAD)

Pointing towards a desire for even broader integration, the African Union’s Agenda 2063 (AU, 2017a) describes a 50-year development plan featuring a focus on African integration including freedom of movement of people, capital, and goods (point 24, Agenda 2063, 2015). This ambition is supported by the desire to develop transportation and communication infrastructure to facilitate both economic and political integration of the continent (point 25, Agenda 2063, 2015). One of the flagship initiatives of the AU is the Continental Free Trade Area (CFTA), (AU, 2017a). The second meeting of the technical working group took place in April 2017 and the draft is scheduled to be proposed soon (AU, 2017b).

The large number of regional trade blocs in SSA suggests that policymakers believe that trade blocs present opportunities for promoting regional trade, boosting growth, engendering development and overcome food security problem (UNCTAD, 2013). However, even if *de jure* both trade and agricultural policy are becoming regionalised, there is still significant variation in

[1] The FSNWG monitors informal cross-border trade of 88 food commodities and livestock in eastern Africa (i.e. Tanzania, Burundi, Rwanda, Uganda, Kenya, Somalia, Djibouti, Ethiopia, Sudan, and South Sudan and DRC).

terms of the pace of integration and harmonisation across the SSA countries, as well as the extent to which private sector actors are incorporated into these processes (Engel et al., 2013).

2. Barriers to food trade in sub-Saharan Africa

Despite expressing an ambition for liberalised trade and steady progress in the *de jure* liberalisation of staple food markets, governments in SSA countries continue to intervene heavily into markets. These interventions may take different forms, e.g. import tariffs (or other legal barriers to trade) or manipulation of the prices of staple goods (i.e. selling public reserves of food staples at below-market prices), and are usually presented as "national food security interventions" (see among others Dorosh et al., 2009).

Limited empirical research has been conducted into the price volatility of staple food in SSA, and the effects of liberalisation remain debated (Poulton et al., 2006). Seasonal and yearly (rainfall dependent) variability of prices, which negatively affect the poorest populations most, are used to justify government intervention to stabilise prices. However, for example, statistical analysis by Minot (2011) finds that the world price of maize has been less volatile than the price of maize in Africa, suggesting that strategies of national food self-sufficiency have not been effective in reducing food price volatility and may even have exacerbated the problem.

Furthermore, according to the World Bank (2012), in most cases these interventions usually have an adverse impact on the regional market for food staples, especially when prices are artificially manipulated and inconsistent with world market prices. Such policies create uncertainty and unpredictability on these markets and, thus, diminish the productivity and trading capacities of domestic farmers and private firms and raise fears of being undercut by subsidised government food (World Bank, 2012).

The key barriers to staple food trade include:

- Official tariff and non-tariff barriers;
- Restricted and limited access to inputs such as seeds and fertilisers;
- Outdated, opaque and unpredictable trade policies;
- Corruption;
- High transportation costs;
- Significant informal trade and gender barriers to trade.

Intra-SSA trade faces high tariffs and significant non-tariff barriers (NTBs) such as: product standards; price controls; discriminatory foreign exchange allocation; quotas or prohibitions; non-automatic licensing; administrative obstacles; excessive and unnecessary document requirements; and unnecessary delays in custom and other official procedures (see also Mbithi et al., 2016).

The effect of NTBs on trade is hard to quantify, but combined with tariffs, they increase trade costs and inhibit intra-regional trade in staple crops[2]. There are also some concerns that the reduction of tariff barriers in SSA may make the use of NTBs more common and pervasive as

[2] Successful regional integration experiences elsewhere in the world highlight that tackling tariff barriers is necessary but not sufficient to enhance trade (Engel and Jouanjean, 2013).

SSA countries continue to rely on a “self-sufficiency model” and seek to protect their markets from external competition (Keane et al., 2010).

NTBs are applied not only to small traders, but also to big ones. For instance, the largest purchaser of food in West Africa, the World Food Programme, has reported frequent problems in obtaining export permits, quality certificates and other documents from different countries in order to process transactions (Keyser, 2012).

Although SSA RECs have signed many trade agreements on the removal of tariffs and NTBs, very little progress has been made in implementation of these agreements; this fact continues to hamper SSA intra-regional trade (UNCTAD, 2013).

The cross-border seeds trade is restricted primarily due to NTBs, resulting from sanitary, phytosanitary and plant quarantine measures, seed certification, and variety release regulations, which differ across countries. “Seeds security” measures are part of the national “food security” approach existing in SSA countries. These restrictions have a significant impact as many SSA farmers lack access to modern high-yield seed varieties (World Bank, 2012). Food safety and sanitary and phytosanitary standards (SPS) rules and regulations for food staples vary across SSA countries despite many having similar agro-ecological conditions for pests and diseases, and similar demands on food safety[3] (World Bank, 2012). Food quality standards also differ among SSA countries and negatively affect regional trade in SSA food staples, mainly because of opacity of national trade policies (e.g. when traders are unaware of the destination country’s standards and only learn of them at the port of entry)[4]. A key concern with seed regulation in SSA is the inordinate amount of time required for the approval process, which can take two to three years or longer (World Bank, 2012).

Similarly, fertilisers cannot move freely from one country to another in SSA. Most fertiliser consumed is imported from outside the continent and almost all of the phosphate rock and fertilisers produced in SSA are exported out of the continent (FTF, 2015). According to the U.S. Government’s ‘Feed the Future’ initiative (2015), challenges and policies that restrain the SSA fertiliser market are mostly associated with government interventions in the form of taxes, tariffs, subsidy programs, and poor infrastructure[5]. For instance, approximately one-third of countries have import duties and half the countries levy some form of tax on fertilisers in SSA (Wanzala, 2011).

Another significant barrier to cross-border trade (in all types of goods) is corruption. The consequences of corruption can be seen on the macroeconomic or political level (e.g. elections in 2016), but also on a local level, crucial for small businesses (Transparency International, 2017). Despite being a model for stability in the region, the corruption index of Ghana, (as well as of Malawi, Lesotho, and Gambia) has significantly declined. Some other large SSA countries, such as South Africa, Nigeria, Tanzania, and Kenya, have also failed to improve their scores on the index. Corruption may affect cross-border traders directly (e.g. bribes at border posts) or through restrictive trade policies implemented at the instance of lobby groups.

[3] Farmers in one country may not have access to higher yield seeds that have been approved by the neighbouring country under similar agro-climatic conditions.
[4] These costs and delays are quite often intensified by border customs officials who do not understand seed trade policy (World Bank, 2012).
[5] For more details, please see FTF (2015), p. 10.

The SSA region is characterised by poor, underdeveloped and inefficient transportation infrastructure, poor national, regional and international connectivity[6] and ineffective logistical services (Viljoen, 2016). The cost of moving goods in SSA is high, transit times uncertain, and delays exceptionally long. According to UNCTAD (2016b), transport costs in Africa are the highest in the world[7]. SSA's high transport prices are accompanied by poor service quality, on average below other regions in the world (Teravaninthorn and Raballand, 2009). The World Bank's Logistics Performance Index 2016 rates SSA lower than any other region worldwide, indicating that a large part of the continent does not provide sufficient affordable and reliable transport and logistics service (World Bank, 2016). According to the World Bank (2012), high transportation costs are due to a lack of competition in transport (trucking) sector, little incentive to modernise, and a large number of cross-border restrictions. One of the more obvious but stubbornly persistent problems is that of roadblocks[8] which cause delays and offer opportunities for bribe seekers (World Bank 2012).

African women are often considered to be "at the forefront" or "key actors" of intra-Africa trading activities (see for example World Bank, 2013). The World Bank report (Brenton et al., 2013) demonstrates that the majority of small cross-border trade is performed by women, informally, and in large part trading staple foods; another study reports that 70 to 80 percent of informal cross-border traders are women, and that their activity is centred on staple foods (TMEA, 2017b).

SSA female cross-border traders face the following gender barriers (Brenton et al., 2013):

- gender biased treatment at cross-border posts (ranging from bribes to insults and physical harassment);
- lack of awareness of their rights (exacerbated by difference in social classes between poor female traders and older, more literate officials);
- lack of "business culture" for women (lack of decision-making power within the household and related private property rights issues, as well as the fact that they are often denied participation in trade networks and high value activities);
- from a formal perspective, women face more constraints and delays in acquiring necessary documents.

Brenton et al. (2013) recommend changes to both households' and officials' behaviours to lift these constraints. They strongly call for transparency and gender equality, among others, at the border crossing posts. One-stop border posts (OSBP), described in section 3, are an attempt to implement these recommendations. Given that many female traders are not formally registered as businesses, the formalisation of these small-scale trade activities would both benefit female empowerment and boost economic activity (FAO, 2017).

3. Policy recommendations from various authorities

Many of the above barriers are not exclusive to staple foods. Thus, while some trade liberalisation and cross-border trade facilitation initiatives are not explicitly aimed at the staple

[6] Landlocked countries are in a particularly difficult situation.

[7] African countries paid more for international transport than any other region over 2005-2014 period (i.e. an average of 11.4 percent of the final cost against only 6.8 percent for developed countries

[8] Even if individual delays and number of bribes made at each roadblock are relatively small, a large number of roadblocks over short distances usually add up to significant expense and delay, raising transport costs and leading to inefficient use of transport equipment and drivers' work-time.

foods market, they will nevertheless significantly affect agricultural products. The key specific barriers to intra-regional trade in staple foods are national trade policies. Policy recommendations and examples of initiatives to address this and some other issues are presented below.

Poulton et al. (2006) offer recommendations to reduce staple food price volatility. One recommendation is to encourage the development of private grain storage facilities. This can be done through subsidies, but the authors warn against using this method in the long term and advocate the setting of clear rules, including the protection of property rights, to minimise the crowding-out effect[9]. Kirimi et al., (2011) and Enzama, (2016) suggest that the development and the use of private storage facilities is restricted by uncertainties in prices of the stored food products. For example, concerning the storage of maize in Kenya, unexpected changes in import tariff rates and in National Cereals and Produce Board selling prices cause significant price volatility and may render the storage facilities unprofitable. Stabilising government behaviour should improve the development of the private storage facilities.

Another recommendation is to adopt a policy of "critical commodity chain support", where support (e.g. access to financing and transport infrastructure) is aimed at small local producers of staple foods, fostering the development of the private sector in production. This approach was adopted in Kenya for maize production, where evidence shows that marketing training offered by the Kenya Maize Development Programme enables farmers allowing them to obtain higher prices (Kirimi et al., 2011). However, the overall effectiveness of this approach is hard to evaluate, as in 2016 Kenya was only net importing maize and the results of support to the local producers and traders are therefore not apparent (Enzama, 2016).

Dorosh et al. (2009) suggest that trade should be the stabilising tool: the authors give the example of Zambia, which depending on the harvest, can be a net exporter or net importer of maize. Cross-border trade of maize and cassava is heavily discouraged by unpredictable policies and general mistrust: producers know that the government is likely to regulate the prices in both abundant and deficient years, reducing the investment incentives (Dorosh et al., 2009).

Subsidy programmes and food aid may provide temporary relief, but are not sustainable in the long term and discourage private production. Dorosh et al. (2009) provide a theoretical model adapted to the case of Zambia and maize trade with South Africa. The authors examine a wide range of policy instruments and conclude that in the event of an exogenous shock (for example a bumper harvest or a drought) an open border policy will be the most beneficial in the long run, especially for the poorest households. On the contrary, authors demonstrate that quotas and price regulations exacerbate the volatility of prices, and reduce the motivation to explore other cultivars (for example drought-resistant ones) and to invest in agricultural innovations. Thus, while acknowledging that full scale liberalisation cannot be a panacea, there is sufficient evidence to recommend regional trade facilitation. Lesser & Moisé-Leeman (2009) obtain similar results for a generalised analysis of SSA countries. The authors give additional recommendations for facilitating dialogue between small cross-border traders and officials. They also warn that trade policy reform will not have an immediate impact and will not fully eliminate the informal trade in the region.

[9] The crowding-out effect occurs when increased government intervention, for example increased government spending on producing staple foods by the public organisations, would replace the production of the private sector.

Such general policy recommendations become closer to practice: available case studies illustrate a shift in trade policy perspective for many SSA countries from restrictive government intervention with "food security" as the stated goal to promotion and development of the private sector. In trade and agricultural policies this was done via a number of Public-Private Partnership initiatives (PPPs). It has to be noted that trade policies are very heterogeneous across different countries, and they may evolve rapidly depending on the political situation. Many countries declare the importance of regional trade integration policies, but others continue to attempt to rely on a "self-sufficiency" model, adopting protectionist measures and restricting staple foods markets.

4. Examples of initiatives for trade promotion and facilitation

Eastern Africa Seed Committee (EASCOM)

EASCOM exemplifies a PPP that has evolved to address the gaps in policy and practice regarding production and trade in seed across ten countries in eastern and central Africa. This committee is comprised of breeders, regulators, policymakers and public-sector representatives from each member country (Burundi, Democratic Republic of Congo, Eritrea, Ethiopia, Kenya, Madagascar, Rwanda, Sudan, Tanzania and Uganda).

The EASCOM platform facilitates the adoption and implementation of harmonised regional seed regulations, standards and procedures that were agreed in 2002. This has led to advances in variety evaluation, release and registration, seed certification, phytosanitary management, plant variety protection, and seed import and export procedures in Eastern and Central Africa.

Seed policy harmonisation in ECA has contributed to growth in private-sector involvement in the sector and more varieties being bred and released by the private sector. The gains from harmonisation include:

- Kenya has released 140 new crop varieties, 30% from the private sector[10];
- Uganda released 27 varieties, 50% from the private sector;
- Tanzania released 121 varieties, 30% from the private sector;
- Sudan released 243 varieties, all from the public sector;

The total welfare gain for the ECA region as a result of this initiative has been estimated to be over US$727 million (CTA, 2015).

Alliance for Commodity Trade in Eastern and Southern Africa (ACTESA)

In 2010, in an effort to boost regional trade in agricultural commodities, the Common Market for Eastern and Southern Africa (COMESA) Heads of State and Government established the Alliance for Commodity Trade in Eastern and Southern Africa (ACTESA), as a Specialised

[10] During 2000-2008, 14 seed enterprises released 140 varieties in Kenya, representing a growth rate of 270 percent over the 38 varieties released 1981-1999. Of these, 43 varieties were from privately owned seed companies (Waithaka et al., 2012).

Agency of COMESA to integrate small-scale farmers into national, regional and international markets (COMESA, 2015).

ACTESA's objectives are to:

- improve competitiveness and integration of staple foods markets in the region through improved micro and macro-economic policies as the drivers of staple food markets;
- improve and expand market facilities and services for key agricultural commodities;
- increase the commercial integration of smallholder farmers into national and regional market.

According to a USAID (2012) evaluation, ACTESA needed improvement in management and governance, as well as financial viability. The latest published report on the COMESA official web-site for 2015 shows a very timid increase in the regional trade and underlines the continuing inconsistencies in tariff rates between the member of the Alliance, as well as difficulties in the implementation of agreements. This concerned particularly cross-border trade, where traders were not aware of their rights and applicable tariffs (COMESA, 2016). The Cassava Cluster Programme is among the few reporting positive results, with clusters established and selling their produce to industries in Zambia, Burundi, Rwanda, and Kenya (in the latter a gendered approach is ensured by the partnership with the Federation of National Associations of Women in Business in Eastern and Southern Africa) (COMESA, 2014).

Food trade remains a major challenge: the region continues to be a net importer and the commitments previously undertaken to promote intra-regional trade and agriculture were not respected. New initiatives were established: the Comprehensive African Agricultural Development Programme (CAADP) in particular should authorise further development of the Public-Private Dialogue Platform. The first events in this programme took place only in the beginning of 2017 (CBC, 2017), thus it is likely to be too early for any evaluation of results.

With the "Trading for Peace" programme COMESA established and funded trade information desks (TID) (for example, at key border posts between Zimbabwe, Zambia and Malawi; Rwanda and Uganda) (AfBD, 2013; ATF, 2015). Such facilities make customs procedures more user-friendly with a TID officer to assist traders in completing documents. Due to cessation of funding by COMESA, since 2015 TIDs have been used as foundation for the Great Lakes Trade Facilitation project established by World Bank. TID officers should be able to help cross-border trade by providing information, including the COMESA Simplified Trade Regime; and by taking complaints and mediating conflicts. The latest report on results (World Bank, 2017b) shows that targets are far from being achieved.

East Africa Trade and Investment Hub (EATIH)

The East Africa Trade and Investment Hub (2014-2019) is an on-going U.S. Agency for International Development (USAID) funded project, managed by Development Alternatives Incorporated (DAI). It aims to increase trade and investment in the region (among Burundi, Kenya, Rwanda, Tanzania and Uganda) and, therefore, to reinforce regional integration. One of the main objectives is to bolster regional trade in staple foods, i.e. to increase the EAC's intra-regional trade in staple foods by 40 percent (USAID, 2015).

The EATIH works with regional public and private sector partners; the EATIH's partners include regional economic communities (RECs) and regional trade associations (RTAs).

According to USAID (2014), some progress has been made in Harmonisation of Standards for Staple Foods. The EATIH has "facilitated extensive consultations between the EAC, COMESA and the Alliance for Commodity Trade in Eastern and Southern Africa (ACTESA), national level bureaus of standards and the private sector to harmonise standards for 22 staple foods including maize, wheat, rice, beans, and millet" (USAID, 2014).

Among other results, this project facilitated the Eastern Africa Grain Council Forum, where 58 contracts were signed to sell 279,000 metric tons of Ethiopian food grain surplus to neighbouring East African countries with food shortages; the total value of these contracts was US$93 million (DAI, 2017).

A similar initiative to reduce trade barriers in a different region, "Southern Africa – Trade and Investment Hub (SATIH)", is also funded by USAID and managed by DAI.

MoveAfrica

MoveAfrica is a transport and logistics initiative of the NEPAD Agency that was officially launched in May 2016 on the margins of the World Economic Forum in Kigali, Rwanda. This initiative aims to address the transformation of Africa's trade by addressing soft issues related to cross-border transport and logistics challenges on the continent. It will seek to reduce transport costs and increase logistical efficiency in Africa in order to boost intra-regional trade and economic development.

This initiative targets the soft infrastructure in particular; to address the existing issues in laws governing cross-border transport, the regulations for crossing the border (e.g. customs clearance, quarantine), and the systems and organisational resources for the operation and maintenance of "hard" infrastructure will be implemented (NEPAD, 2016; TRALAC, 2016).

Because this initiative was launched only last year, outcomes cannot yet be evaluated, but TRALAC (a capacity-building NGO operating in eastern and southern Africa) estimates that the volume of trade in SSA will more than triple, from 102.6 million tonnes in 2009 to 384 million tonnes by 2030, if trade corridors are completed (TRALAC, 2016).

TradeMark East Africa (TMEA)

TradeMark East Africa (TMEA), an organisation funded by multiple international development agencies is working closely with the East African Community to promote economic development through trade. TMEA finances a range of projects on different scales, with an emphasis on facilitating physical access to markets (TMEA, 2017a). These physical improvements are complemented by improvements in the trade environment: TMEA is participating in the construction and monitoring of one-stop border posts (OSBPs) in Uganda, Kenya, Tanzania, Burundi and South Sudan (TMEA 2017b, c, and d).

In Rwanda, the interventions funded by TMEA between 2010 and 2016, at a cost of $65 million and implemented in partnership with the Government of Rwanda, have contributed to:

- Reduction in cost of transporting containers from Mombasa to Kigali from $6500 in 2011 to $4800 in 2016 saving the country approximately $7 million;
- Improvement of Rwanda's ranking in trading across borders; i.e. ranking improved 44 places (from 131 to 87), mostly as a result of investments made by TMEA, that have reduced the time taken to export and import and exit borders.

This was achieved by increased automation of key trade processes, reduction of NTBs, improved standards testing and border infrastructure upgrades in Rwanda. For example, from eight weigh-bridges only one is remaining; roadblocks are reduced; a modern high-capacity bridge is constructed, parking facilities are made available; and an electronic single window at the customs was set (EUROPAID, 2017; RTDA, 2017; OECD, 2017a).

One-stop border posts (OSBPs)

One-stop border posts (OSBPs) provide a legal framework, facilities, and procedures to allow goods and people to cross borders in a single streamlined facility rather than stopping at separate exit and entry posts. They combine and simplify clearance procedures, reduce the number of administrative steps, increase coordination between different controls, and optimise the use of different facilities (e.g. computer and scanning facilities, office accommodation). OSBPs are "expected to reduce time and cost in crossing borders" (TMEA 2017a). They also increase transparency: information is more easily collected and monitored. Warehouse facilities are made available for small cross-border traders, who are also better able to coordinate their activities and access economies of scale (e.g. hiring one truck for several traders). Equality is improving overall, with public toilets, gender disaggregated detention centres, and special facilities for women with children and physically challenged traders (OECD, 2017b). Direct benefits to the private sector are already reported (TMEA, 2017b). OSBPs have been established between Kenya and Tanzania. TMEA and OECD (2017b) report the reduction of customs clearance time in Busia OSBP in Uganda (on the border with Kenya) and the reduction in the volume of customs declarations. There are further plans to establish OSBPs between Uganda and South Sudan.

Regional Electronic Cargo Tracking System (RECTS)

The African Union's Agenda 2063 has an ambitious aspiration for SSA infrastructure and a number of different projects are ongoing. One of the most recent initiatives is the Regional Electronic Cargo Tracking System (RECTS) between Kenya, Uganda, and Rwanda unveiled in 2017. This system should allow reduced transit time, cargo theft and diversion of goods in transit. Countries will seal loopholes that lead to revenue loss because of the diversion of un-taxed goods into the market. RECTS will also eliminate the need for physical escort and monitoring of sensitive cargo (TMEA, 2017d).

Initiatives targeting gender bias and informal trade

Through initiatives of African-specific networks, such as African Women's Economic Policy Network (AWEPON), women have access to training and networks. The importance of gender barriers cannot be underestimated. Successful examples of female-owned and female-employing cereals companies (such as "ETS Tout Super" or "Rama Cereal") trading at the national and regional levels, and achieved with the help of Trade Hub training programmes and access to finance facilitation are showcased by the USAID #EntrepreneuriElle online campaign (USAID, 2017; West Africa Trade and Investment Hub, 2017a and 2017b).

TMEA also trains women in cross-border trade regulations (reporting more than 2000 women trained) and brings together formal and informal actors through a project called "Search for the Common Ground" which aims to inform all participants of the EAC Customs Union protocols. This, in turn, should facilitate the implementation of the official initiatives, which otherwise remain unimplemented and have very little impact. Through all these (and other) networks, dissemination of market information and policy consultations with small-scale cross-border traders is conducted relatively successfully in Uganda, Rwanda, Liberia, and Ghana (FAO, 2017).

The common passport for ECOWAS should also lower some of the barriers faced by female cross-border traders[11], even if this initiative is still limited due to only partial implementation (UNECA, 2017).

One of the most prominent recommendations is to reduce obstacles to formal trade. One such measure was the introduction of simplified trade regimes (STR), reducing customs procedures for relatively low volumes of goods traded. FAO (2017) identifies COMESA's STRs as best practice to be disseminated to other SSA regions. The STR is operational between COMESA Members. It is used where a small scale cross border trader is exporting goods valued at US$1,000.00 or less per consignment. The goods should be listed on the COMESA STR Common List and should be for re-sale or use in the business.

The STR is intended to overcome any challenges by simplifying the whole process of clearing goods for small scale cross border traders by way of:

- A Simplified Certificate of Origin which should be signed and stamped by a national official at the border post for all goods that appear on the Common List.
- A common list of qualifying goods displayed at all border posts within COMESA.
- A simplified customs document completed as the trader enters the country he/she is exporting to (ZIMRA, 2017).

The COMESA Green Pass (CGP)

The COMESA Green Pass (CGP) will be a harmonised sanitary and phytosanitary regime with a regional certification scheme (GIZ, 2012). One of its objectives is to facilitate movement and trade in food and agricultural commodities by restoring confidence among trade partners and removing SPS barriers to trade. The Green Pass would be issued by a National Green Pass Authority that would certify, monitor and keep a database of certified companies. A SPS Certification Technical Panel (within the COMESA SPS Unit) would support and monitor the competent authorities accredited to issue CGPs. According to this scheme, if a product has been inspected and certified in conformity with SPS rules in a COMESA Member state, it can be then traded in other COSMESA countries without any additional inspections.

The feasibility study for CGP (covering maize, beef, and fresh fruits) was completed in 2014 (STDF, 2014). It seems that this initiative is still in a project form (COMESA, 2015) and we were unable to find any robust evaluations of its impacts. However, according to the World Bank (2012), efforts like the Green Pass, which encourage member states to recognise each other's conformity assessment procedures, would reduce the transaction costs of export procedures and therefore boost regional trade in food staples.

Addressing unpredictability and opacity of trade policies

Opacity and unpredictability of trade policies are among the paramount obstacles to intra-regional trade in general and particularly in trade in staple crops, since they usually provoke mistrust between government and the private sector. Predictability and commitment to existing

[11] As female traders more often do not have passports or have more difficulties in obtaining them.

regulations and agreements, and better communication of government policies, are key environmental factors supporting the private sector, enabling agents to make better-informed long-term decisions, and to invest in modernisation. Economic operators should have clarity about import tariffs that they will be charged when they enter into contracts (Euro Commerce, 2015). Uncertainty can even cause withdrawal of private firms from the market altogether (Tschirley et al. 2006). For instance, a study of Zambian maize markets showed that several international grain trading companies left the market because of high risks imposed by unpredictable government participation in the maize market (Nijhoff et al. 2002).

Article X of the GATT (Publication and Administration of Trade Regulations) requires each WTO Member to: 1) publish its related laws, regulations, rulings and agreements in a prompt and accessible manner; 2) abstain from enforcing measures of general application prior to their publication; 3) administer the above-mentioned laws, regulations, ruling and agreements in a uniform, impartial and reasonable manner. The main objective of this article is transparency.

However, many SSA countries continue to meet difficulties in fulfilling the notification obligations for transparency purposes (WTO, 2017b). In 2013, concerns over the length of the negotiation process and disappointment with very limited results were expressed in the conference of Ministers of Trade on Economic Partnership Agreement within the African Union framework (AU, 2013). One example of the impact of unpredictable policies was recently illustrated by a trade dispute between Tanzania and Kenya in which mutual trade restrictions (which were lifted in July 2017) on a range of products including a ban on wheat and maize imports were extremely harmful (TMEA, 2017c). Such bans are against not only EAC rules, their unpredictable nature catches private sector participants unawares, disrupts the trade chains, and participates in the creation of a generally unstable trade environment.

National level initiatives (example of Sierra Leone[12])

Sierra Leone ranks 169th among 190 economies in terms of the ease of trading across borders, according to the World Bank's Doing Business 2017 report (World Bank, 2017a). Border taxation remains an important source of government revenue in Sierra Leone (WTO, 2017a) and tariffs are subject to frequent revisions, which are likely to impact the predictability of the tariff regimes (WTO, 2017a).

Agriculture is one of the most important industries in Sierra Leone (e.g. agricultural sector’s contribution to GDP was 53.7% in 2015). Cocoa is Sierra Leone's major agricultural export, and rice and cassava being the main food crops. Rice is Sierra Leone's main staple food, currently produced mostly for the domestic market with only few marginal cross-border exports to Guinea and Liberia (WTO, 2017).

In 2010, the government of Sierra Leone developed a National Export Strategy (NES) with a vision to "transform Sierra Leone into a flourishing country through a globally competitive export-driven economy”. The NES has defined a framework for boosting agricultural exports to US$251 million by 2015 (compared to US$33.1 million in 2009), (Ministry of Trade and Industry, 2010). A

[12] The example of Sierra Leone is chosen as, while the country was one of the lowest in ranking in terms of ease of trading, it demonstrates a willingness to integrate into the SSA market and adopts liberalising measures, while others (e.g. Nigeria) continue to add more protectionist measures.

unique feature of this initiative is that it is the fruit of constructive collaboration between the public and private sectors.

More precisely, the NES promotes strong private sector participation and addresses issues of competitiveness through its strategic objectives as follows:

- improving productivity and enhancing value addition;
- diversifying the current export base;
- strengthening the human and financial capacity of all stakeholders along the value chain

Incentives are provided under various pieces of legislation. For instance, the Finance Act 2013 allows 5 years' duty-free import of agricultural inputs (fertilisers; pesticides; insecticides; seeds and seedlings; hybrid tree seeds; seed animal for feeding; day-old-chicks; and animal semen).

There is no recent assessment of the NES; the latest assessment was done by Belloc and Di Maio (2012). The authors conclude that:

- export capabilities were improving, although the awareness of local producers about export opportunities remained limited;
- physical infrastructure was still largely inadequate, and compliance with quality requirements and standards continued to be a major challenge;
- limited access to credit restricted considerably the development of export-oriented activities;
- land-tenure system, especially the application of the customary land system in rural areas, was an important barrier to the development of the agriculture sector.

In order to reduce the State's involvement in the private sector, in 2002, Sierra Leone established the National Commission for Privatisation (NCP) with a view to privatising public enterprises. In 2013, the authorities dissolved the Sierra Leone Produce Marketing Board, a state-owned enterprise solely responsible for the purchase, export, and marketing of agricultural cash crop products including cocoa, coffee, cashew, palm oil, rice, and sorghum. The Board was replaced by a limited liability company, the Sierra Leone Produce Marketing Company Limited.

In addition, in 2011, Sierra Leone established a special economic zone (SEZ) with the goal of attracting foreign investors into the country by providing several incentives, including a perpetual duty exemption on imports and exports, a three-year corporate tax holiday, and on-site government services (such as business registration; customs inspection and immigration procedures). However, under the ECOWAS Protocol, exports by SEZ firms to other ECOWAS countries are not eligible for preferential treatment, i.e. they continue to be subject to customs duties at an applicable rate that does not profit to intra-regional trade.

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