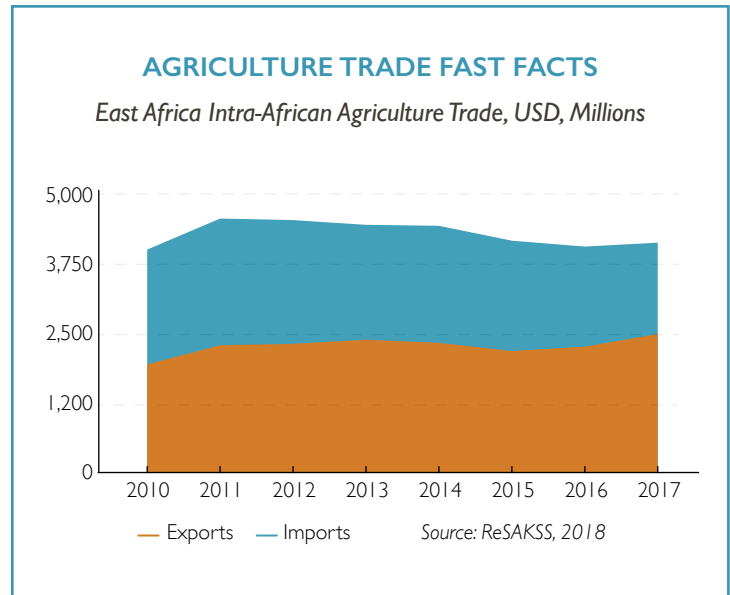




FEED THE FUTURE ENABLING ENVIRONMENT FOR FOOD SECURITY PROJECT Intra-African Agriculture Trade Improvement Scorecard: East Africa

In June 2014, African Union member states committed to a set of goals in the Malabo Declaration. As reported in the 2018 Inaugural Biennial Review Report of the African Union Commission on the Implementation of the Malabo Declaration, countries across Africa vary in their progress toward tripling trade and establishing effective trade policies by 2025.

This scorecard compiles publicly available and regularly updated data related to four key trade determinants that are actionable at the national level. The indicators used in the scorecard align with determinants identified in the Regional Strategic Analysis and Knowledge Support System's (ReSAKSS) 2018 Africa Agriculture Trade Monitor report, namely (1) production capacity, (2) the cost of trade, (3) institutional efficiency, and (4) trade policies. Countries are individually evaluated in comparison with their peers — either the Feed the Future or sub-Saharan African countries, as indicated. The coloring of the indicators designates the country's performance in this area relative to its peers, as shown in the key below.



- Higher-than-average performance (top tertile)
- Average performance (middle tertile)
- Below average performance (lower tertile)
- No data available

COST OF TRADE

	Burundi	DRC	Ethiopia	Kenya	Rwanda	S. Sudan	Sudan	Tanzania	Uganda
Road connectivity	●	●	●	●	●	●	●	●	●
Quality of roads	●	●	●	●	●	●	●	●	●
Perceptions about infrastructure	●	●	●	●	●	●	●	●	●
Truck licensing	●	●	●	●	●	●	●	●	●
Cross-border transport licensing	●	●	●	●	●	●	●	●	●
Domestic transport costs	●	●	●	●	●	●	●	●	●

COST OF TRADE. The quality of infrastructure together with the cost of transport services are determinants of whether agricultural products can even be physically brought to the border to be traded. Without the proper infrastructure, rural populations may remain unconnected or only poorly connected to domestic, regional, or global markets. Lack of adequate border crossings and ports, in quality and in number, can slow down the movement of products. Good roads and an efficient trucking system make it easier and cheaper to import and export food, as measured in the World Economic Forum's (WEF) Road Connectivity Index and by the WEF's quality of roads indicator. Countries are also scored based on users' perceptions about infrastructure in the World Bank's Logistics Performance Index. Poor scoring per the World Bank's Enabling the Business of Agriculture (EBA) truck licensing indicators and by the EBA cross-border transport license indicators highlights a propensity for excessive regulation, which can limit competition and raise prices. Domestic transport costs indicators, derived from the World Bank's Doing Business Trading Across Borders, are used to more closely focus on costs associated with transport within a country's borders.

INSTITUTIONAL EFFICIENCY

	Burundi	DRC	Ethiopia	Kenya	Rwanda	S. Sudan	Sudan	Tanzania	Uganda
Competitive business environment	●	●	●	●	●	●	●	●	●
Agricultural finance	●	●	●	●	●	●	●	●	●
Secured lending	●	●	●	●	●	●	●	●	●
Private international legal instruments	●	●	●	●	●	●	●	●	●
Export border regulations	●	●	●	●	●	●	●	●	●
Export document compliance	●	●	●	●	●	●	●	●	●
Import border regulations	●	●	●	●	●	●	●	●	●
Import document compliance	●	●	●	●	●	●	●	●	●
WTO Trade Facilitation Agreement	●	●	●	●	●	●	●	●	●

INSTITUTIONAL EFFICIENCY refers to the ease of doing business in relation to agricultural trade. High scores per the WEF's product market indicator indicate a competitive domestic market. The EBA finance indicator tracks the ease of accessing finance, with points given for items such as branchless banking and non-bank lending institutions. The secured lending indicator examines the ability of firms and farms to access credit on movable property, including crops on land. Low scores in the private international legal instruments category indicate a need for harmonization with international commercial norms. The Doing Business Trading Across Borders indicators calculate the amount of time importers and exporters spend to comply with regulations at the border and to complete documentation. The World Trade Organization's (WTO) Trade Facilitation Agreement custom indicator examines a country's commitment to implementing the provisions important for agricultural trade outlined in the Agreement.

PRODUCTION CAPACITY

	Burundi	DRC	Ethiopia	Kenya	Rwanda	S. Sudan	Sudan	Tanzania	Uganda
Fertilizer use	●	●	●	●	●	●	●	●	●
Improved seed varieties	●	●	●	●	●	●	●	●	●
Machinery standards	●	●	●	●	●	●	●	●	●
Mobile phone penetration	●	●	●	●	●	●	●	●	●
Digital payments	●	●	●	●	●	●	●	●	●
Rural electrification	●	●	●	●	●	●	●	●	●

PRODUCTION CAPACITY refers to factors that affect the level of supplies. It is determined by resource endowments and other technological and institutional factors that enhance productivity. For example, harvests are bolstered with higher rates of fertilizer use. Larger numbers of available improved seed varieties and a regulatory environment friendly to machinery standards (EBA tractor testing and standards indicators) for tractors lead to more resilient production systems. High rates of mobile phone penetration facilitate communication and exchanges between agricultural actors through digital payment systems, and widespread rural electrification helps farmers power lights, pumps, and equipment.

TRADE POLICIES

	Burundi	DRC	Ethiopia	Kenya	Rwanda	S. Sudan	Sudan	Tanzania	Uganda
Average weighted agricultural tariff	●	●	●	●	●	●	●	●	●
Import and export bans recently enacted	●	●	●	●	●	●	●	●	●
Trade facilitation performance	●	●	●	●	●	●	●	●	●
Export licensing	●	●	●	●	●	●	●	●	●

TRADE POLICIES include measures aimed at protecting and regulating trade. Average weighted agricultural tariffs and import and export bans indicate ways countries engage in protectionist activity. The OECD Trade Facilitation Index measures the performance of border procedures and policies, and the EBA export licensing indicators measure the severity of controls countries place on their main exports.

THE AFRICAN UNION'S 2018 BIENNIAL REVIEW REPORT

	Burundi	DRC	Ethiopia	Kenya	Rwanda	S. Sudan	Sudan	Tanzania	Uganda
Tripling intra-African trade	●	●	●	●	●	●	●	●	●
Establishing intra-African trade policies and institutions	●	●	●	●	●	●	●	●	●

BIENNIAL REVIEW REPORT 2018. The African Union's 2018 Inaugural Biennial Review Report measured member countries' progress toward achieving the Malabo Declaration's goals. To be considered on track for tripling intra-African trade, countries should have reached the minimum of 20 percent in growth rate increase. To be considered on track for establishing intra-African trade policies and institutions, countries are rated by the OECD Trade Facilitation Index. To be considered on track, countries need to reach a cumulative score of 10 points when adding together points given for each of the 10 sub-indicators comprising trade facilitation performance. Note that 10 cumulative points equate to an average trade facilitation performance score equal to one (1) provided by the OECD.