THE DURBAN EDGE

Issue 22 // August 2018

EXPORTING INTO AFRICA

FOCUS ON THE AFRICAN CONTINENTAL FREE TRADE AGREEMENT

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Contents


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Welcome to *the* Durban EDGE

WELCOME TO THE 22ND ISSUE OF *THE DURBAN EDGE*, A QUARTERLY ECONOMIC BULLETIN THAT LOOKS AT THE DURBAN ECONOMY, WITH A BRIEF OVERVIEW OF THE GLOBAL AND NATIONAL CONTEXT.

Published by the Policy, Strategy, Information and Research Department of eThekwini's Economic Development and Investment Promotion Unit, *The Durban EDGE* aims to inform stakeholders of the latest developments and trends in eThekwini.

The theme of this issue is *Exporting into Africa.*

ACKNOWLEDGEMENTS

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Foreword by the Mayor of eThekwini Municipality, Councillor Zandile Gumede

Welcome to the 22nd issue. Development of our continent and her economy is closely tied to development of the City of Durban. Africa forms a crucial export market for the City's manufactured goods. The rest of the Continent receives 40% (R27,7 billion) of all Durban's goods exports, and as the Continent develops, this rand value is increasing rapidly. The leadership of the City is excited about the opportunity that this provides its manufacturers and ultimately, what this will mean for jobs created for her people.

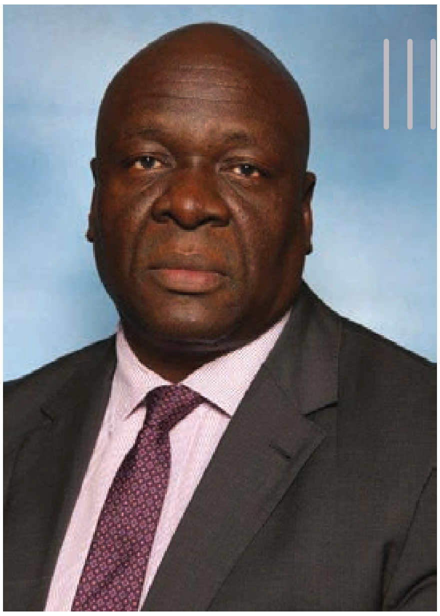
The leadership is also aware of the decade-long efforts by the African Union, and other regional economic communities (RECs) such as the Tripartite Free Trade Area, to encourage regional economic integration and is aware that their hard work is beginning to pay off. Gratitude is also extended to existing RECs such as the Southern African Customs Union (SACU) and the Southern African Development Community (SADC), for having paved the way for regional integration since 1910 and 1992 respectively.

This publication is the City leadership's stamp of approval and endorsement of these efforts, and a call to all affected and relevant parties to make an effort to integrate with the rest of the Continent through export development as a tool to address the economic challenges faced by the City and country.

This year we celebrate the centenary of our former President Tata Nelson Mandela. His dream of peace and reconciliation is being realised on the continent as former foes Ethiopia and Eritrea have ended their longstanding conflict and embraced peace. We congratulate them and wish them well on this new journey. It is also the centenary of former anti-Apartheid stalwart Mama Albertina Sisulu. Her contribution to the struggle for the freedom of our country and people, and the actualisation of women is equally treasured.

Foreword by the Economic Development and Planning Committee (ECOD) Chairperson, eThekwini Municipality, Councillor Sipho Kaunda

The year started off with high business confidence levels, and hopes of a new investor dawn. However, we have recently heard from our new Statistician General Mr Risenga Maluleke that the national economy declined by 2.2% in the first quarter of 2018. The petrol price continues to increase, now hovering around at R16 per litre, and will undoubtedly have an impact on transport costs, business input costs and basic living costs for our people. Eskom is load shedding again and our people are fighting for higher salaries, to be able to feed their families.



The City's leadership has noticed the key challenges facing our country and municipality, and are embarking on the development of a new economic development and job creation strategy for the City, the current one having served its purpose and requiring an update. One of the key tenants of the strategy will be to ensure that the City's economy is able to attract enough external expenditure so that it is not only reliant on its own population's limited buying power, but also on that of external economies. Industries and economic activities such as tourism, exports and investment are all central to the long-term sustainability of the City. The leadership, therefore, appreciates the opportunity to discuss topics of this sort (export development), because it increases the economic strength and sustainability of our economy.

This year, South Africa holds the chairmanship of BRICS for 2018, and therefore hosted the 2018 BRICS Summit from 25 to 27 July. While events were hosted throughout the country, a number of them were hosted by the City, including the 3rd BRICS Film Festival; 8th BRICS STI Senior Officials; 6th BRICS STI Ministerial; BRICS TB Research Network; the 8th Meeting of the BRICS Ministers of Health, and smaller side events. The City is delighted to have hosted these strategic events, and is expectant for the impact it will achieve in the development of the country and its people.

African Union headquarters in Ethiopia, 2018.

Editor's Note

The realisation of the Continental Free Trade Area (CFTA) is a development that the Durban EDGE team has been tracking keenly. The team have strongly felt that this will benefit the Continent if well prepared for by each signatory, but mostly, that it will benefit the City's economy.

After the Kigali Conference in March this year, the natural next step for the *Durban EDGE* team was to keep economic stakeholders in the City appraised of the developments, and, for those who are not familiar with exporting, sensitise them to the importance of exporting.

Some of the key questions that arose after having read the publication are:

- Do exporters, emerging exporters, and potential exporters in the City know where to find assistance?
- Do exporters in the City know the potential markets available to them on the Continent?
- What more can we do to develop existing manufacturers into exporters?

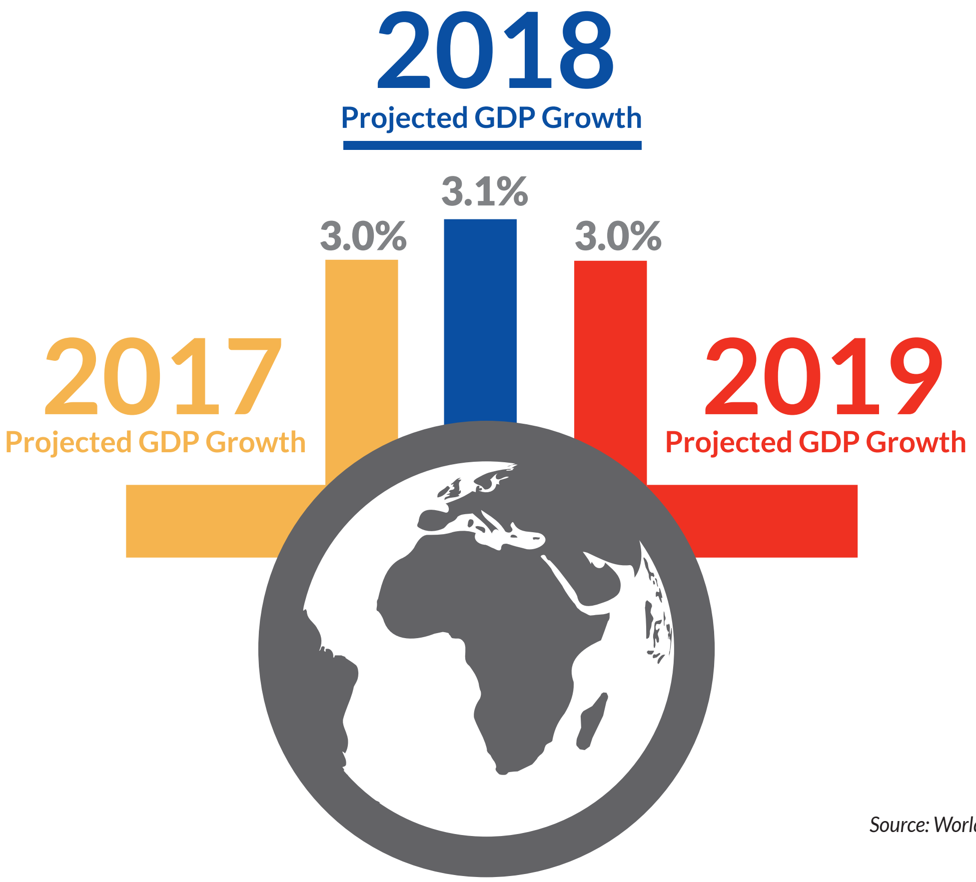
This issue is designed to be of assistance to any exporter or potential exporter in Durban. The *Durban EDGE* team hopes that this information will be passed on, not only through reading the publication, but through word of mouth marketing. We also look forward to engaging with information included in the various articles, and most of all, trust you will be empowered to make better informed decisions.

With kind regards,
The Durban EDGE team

Economic Overview

This publication focuses on exports into the rest of Africa, but will be preceded by some brief highlights affecting the state of the global, national and local economies.

State of the Global Economy

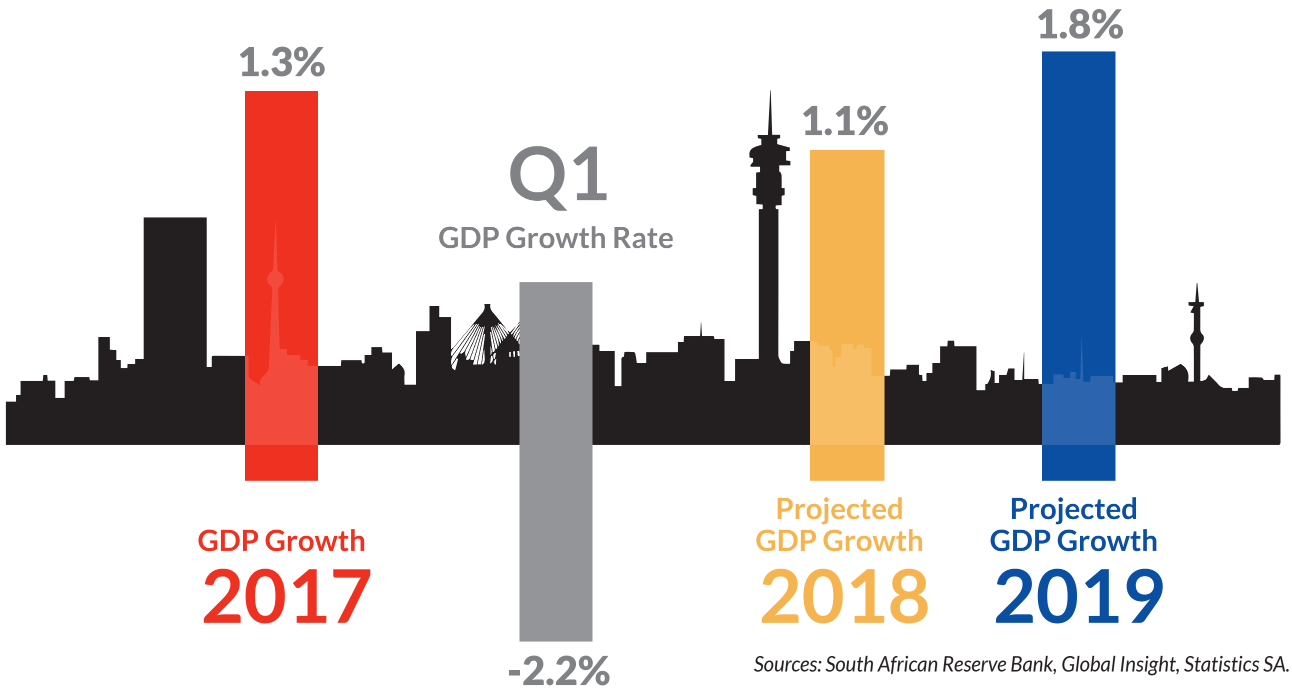


Source: World Bank, June 2018

Global Highlights

Global FDI in 2017	Global World Trade	Historic Free Trade Agreement Signed by African States
According to the FDI (foreign direct investment) Report 2018, the US attracted the most investment in 2017 ($87.4bn), replacing India from the previous year. FDI out of South Africa was $2.9bn, while FDI into South Africa was $3.8bn during 2017. *(The FDI Report 2018).*	World trade growth increased in the first few months of 2018, with the volume of trade expanding by 4.7% according to the World Trade Organization. This was due to cyclical improvements, including an increase in investment growth in developed economies. Rising trade tensions continue to pose a risk to global trade in the future, particularly the trade war between the USA and China. (http:bit.ly/wespreport)	On 21 March 2018, 44 member states of the African Union signed the African Continental Free Trade Area (AfCFTA) Agreement. This commits signatory countries to removing tariffs on 90% of goods, with 10% of designated items to be phased at a later stage. This is expected to boost intra-African trade by 52.3% through this elimination of import duties. (http:bit.ly/wespreport)

State of the SA Economy



Sources: South African Reserve Bank, Global Insight, Statistics SA.

Main positive contributors: Expenditure – household consumption (+1.5%), government consumption (+1.2%). Production – finance, real estate and business services (+1.1%), government services (+1.8%).

Main negative contributors: Expenditure – investment[1] (-3.2%); exports (-16.5%); imports (-6.5%). Production: manufacturing (-6.4%); agriculture, forestry and fishing (-24.2%); mining and quarrying (-9.9%); retail trade catering and accommodation (-3.1%).

National Highlights

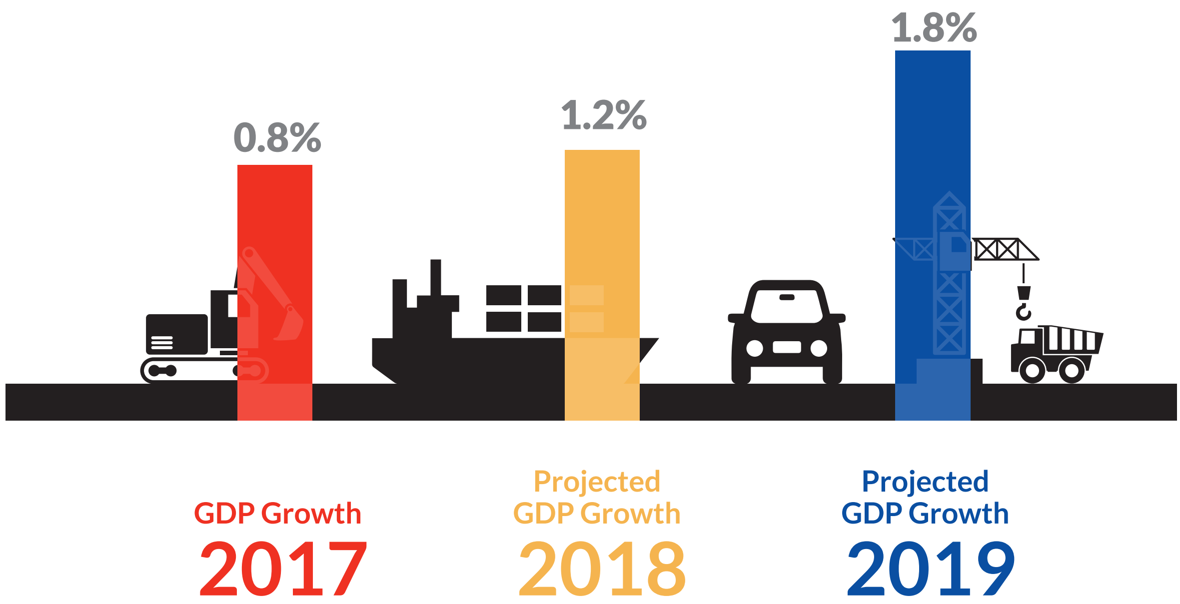
SA to Host BRICS Summit	GDP Contracts in Q1:2018	Production in Q1: 2018	International Trade
The 10th BRICS Summit was hosted in SA commencing 25 July 2018, with the theme 'BRICS in Africa Collaboration for Inclusive Growth and Shared Prosperity in the 4th Industrial Revolution'. The Summit is expected to offer BRICS members the opportunity to extend and advance their cooperation to promote economic development and broaden relationships within the grouping. *(SANews, 4 June 2018)*	GDP contracted by 2.2% in the first quarter of 2018, due to the slowdown in agriculture and mining, after expanding 3.1% in the fourth quarter of 2017. This was the largest quarter-on-quarter decline since Q1:2009. GDP rose 0.8% unadjusted year-on-year in the first quarter. *(SANews, 6 June 2018).*	Agricultural output declined in the first quarter of 2018, due to lower than expected harvests in the Western Cape. Manufacturing output also declined – the mining and construction sector contributed to decline. *(The Real Economy Bulletin, TIPS, Q1: 2018).*	SA had a trade deficit in the first quarter of 2018. Agriculture had the largest decline in exports, while export growth was evident in metals and metal products (2%). *(The Real Economy Bulletin, TIPS, Q1: 2018).*

1 Gross fixed capital formation.

Other Key National Indicators

Inflation Rate	Petrol Price	Exchange Rates	Vehicle Sales
The inflation rate is recorded at 4.5% for June 2018. PPI increased by 4.6% for final manufactured goods, and 0,2% for intermediate manufactured goods, both lower rates than the previous month. PPI for electricity and water was 4,5% in May 2018 compared to 4.9% in April. *(Statistics SA, South African Reserve Bank)*	93 Octane: R15.54 95 Octane: R15.79 0.05% Diesel: R1.19 As at 21 June 2018 (*SA News, 21 June 2018*)	(Increase) Rand/Dollar: 13.47 Rand/Pound: 17.54 Rand/Euro: 15.70 As at 17 July 2018 (*South African Reserve Bank*)	Aggregate new vehicle sales of 42 984 up by 2.4% (+1 022 units) compared to May 2017. (*National Association of Automobile Manufacturers of South Africa*)

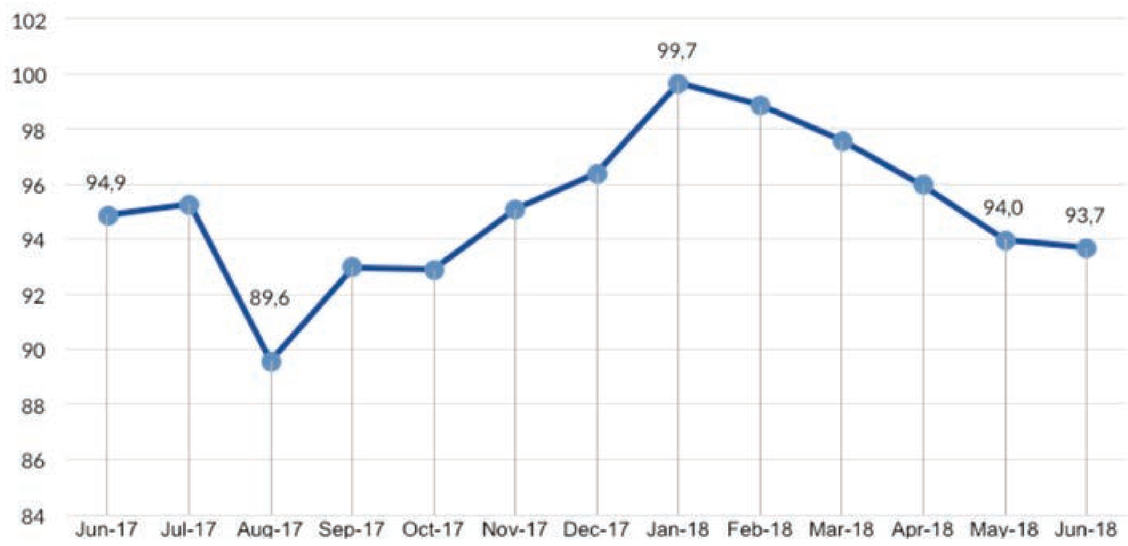
State of the Local Economy



Poverty Statistics	Annual Trade 2017
The number of people living below the food poverty line in 2017 in eThekwini was recorded at approximately 1 951 503. *(Source: Global Insight)*	Total exports: R72.7 billion (increased by 1.6%) Total imports: R105.5 billion (increased by 0.75%) *(Source: Global Insight internal database)*

Business Confidence Overview

SACCI Business Confidence



Source: SACCI, 2018

The above graph depicts the decline of business confidence by 1.6 index points from 97.6 in March 2018 to 96.0 in April 2018. The BCI improved by 1.1 index point year-on-year compared to April 2017. Increased merchandise import volumes, real retail sales and the real value of building plans passed made the largest positive monthly contributions to the BCI in April. However, this was outweighed by less merchandise export volumes, fewer new vehicle sales and the weaker rand.

Labour Force Overview

The City's unemployment trends are more positive than national trends on all indicators.

	EThekwini Quarterly Findings, Q1 2018
New Entrants	More new jobs have been created than new entrants into the labour market (+39 000 jobs vs. +19 000 new entrants), between Jan and March 2018.
Unemployment Rate	Unemployment decreased by 1,6% (Q1 20,3%) and expanded unemployment has also decreased by 0,7% between Jan and March 2018.
Employment Absorption	Employment absorption has increased by 1,47% (49,8%) between Jan and March 2018.
Labour Force	Labour force participation rate has increased by 0.6% (62,5%) between Jan and March 2018.

Source: Stats SA, 2018

Official Unemployment Rate %

	Jan-Mar 2017	Apr-Jun 2017	Jul-Sep 2017	Oct-Dec 2017	Jan-Mar 2018	Q to Q	Y to Y
EThekwini Municipality	21,8	21,8	23,3	21,9	20,3	1,6 ▼	1,5 ▼
KwaZulu-Natal	25,8	24,0	24,6	24,1	22,3	1,8 ▼	3,5 ▼
South Africa	27,7	27,7	27,7	26,7	26,7	–	1,0 ▼

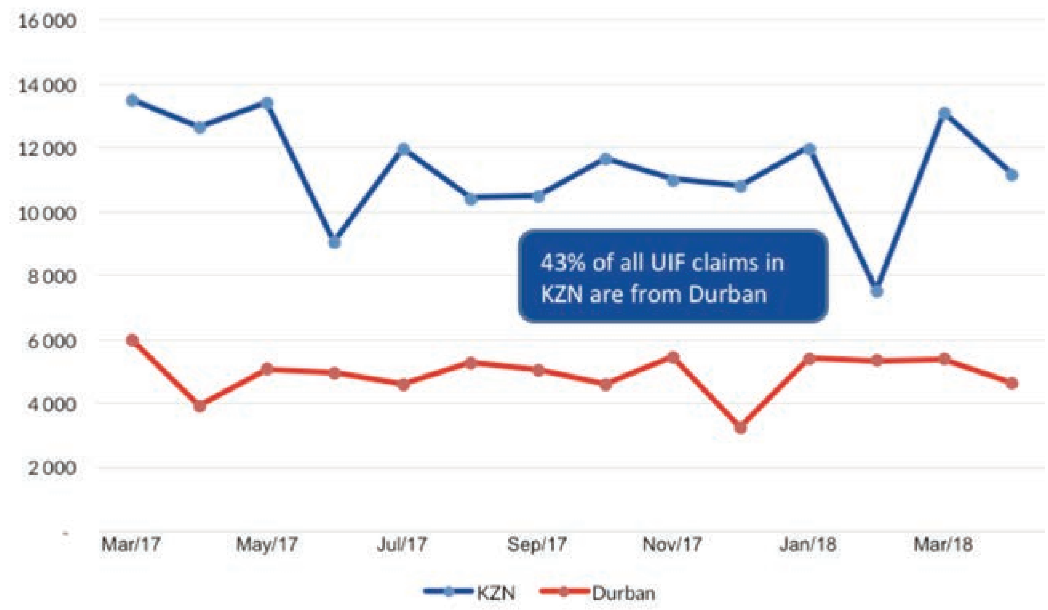
Expanded Unemployment Rate %

	Jan-Mar 2017	Apr-Jun 2017	Jul-Sep 2017	Oct-Dec 2017	Jan-Mar 2018	Q to Q	Y to Y
EThekwini Municipality	28,7	29,3	30,5	28,1	27,4	0,7 ▼	1,3 ▼
KwaZulu-Natal	41,0	40,4	41,0	41,0	40,6	0,4 ▼	0,4 ▼
South Africa	36,4	36,6	36,8	36,3	36,7	0,4 ▲	0,3 ▲

Source: Stats SA, 2018

Unemployment insurance claims give an indication of the number of people who are currently losing their jobs in the formal sector.

UIF Claims for Durban vs KZN

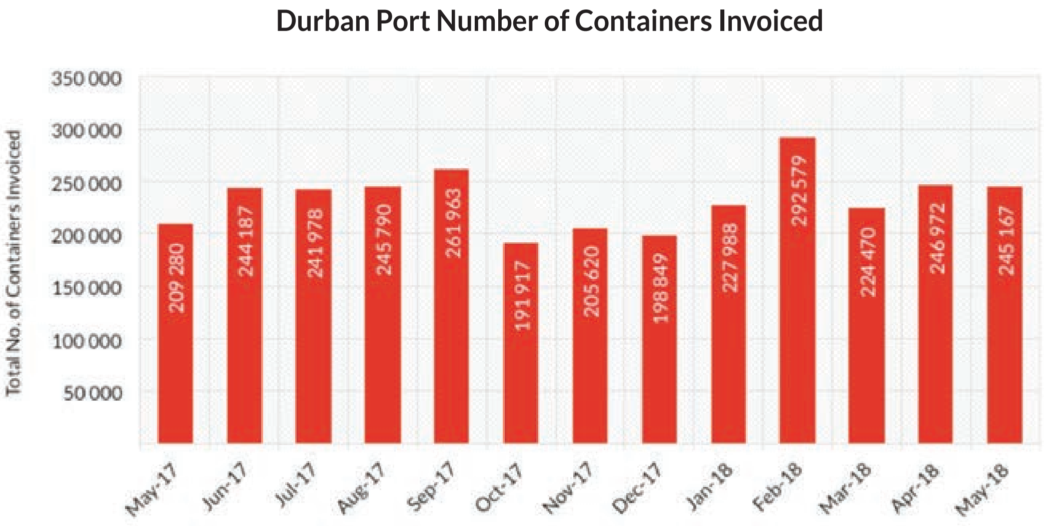


Source: Department of Labour, 2018

Unemployment insurance claims in Durban and KZN are strongly correlated as 43% of all claims originate from Durban. Slight reductions are seen in UIF claims between January 2018 and April 2018. The recent decline in unemployment in the City is yet to have a significant impact on UIF claims.

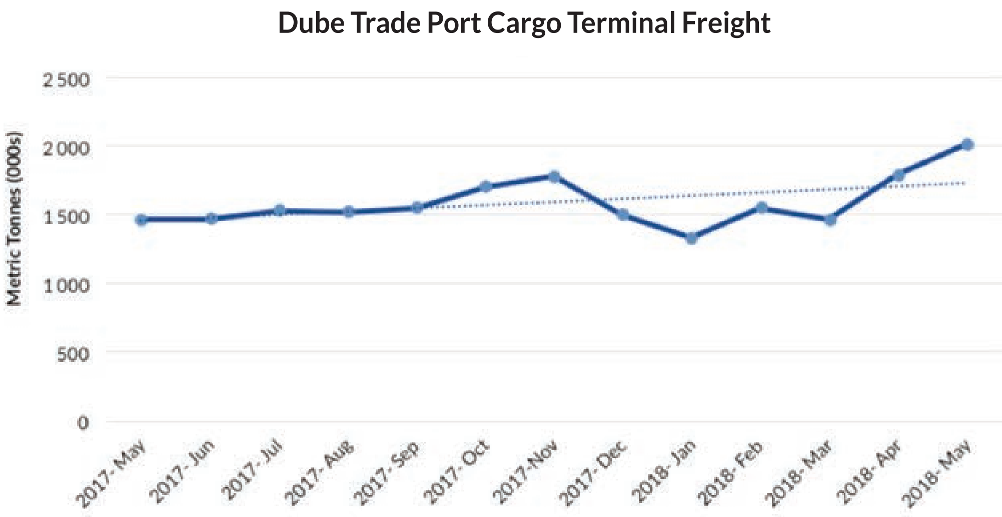
Durban Trade Port Overview

According to PWC[2], shipment remains the most significant method of trade such that a 25% improvement in port performance can increase a country's Gross Domestic Product (GDP) by 2%, placing further importance on the performance of Durban's port.



Source: Transnet National Port Authority, 2018

The total number of containers shipped is slightly above the total number of containers landed by 14 337 TEUs. The total number of containers invoiced increased by 17%, year on year; May 2017 vs. May 2018.



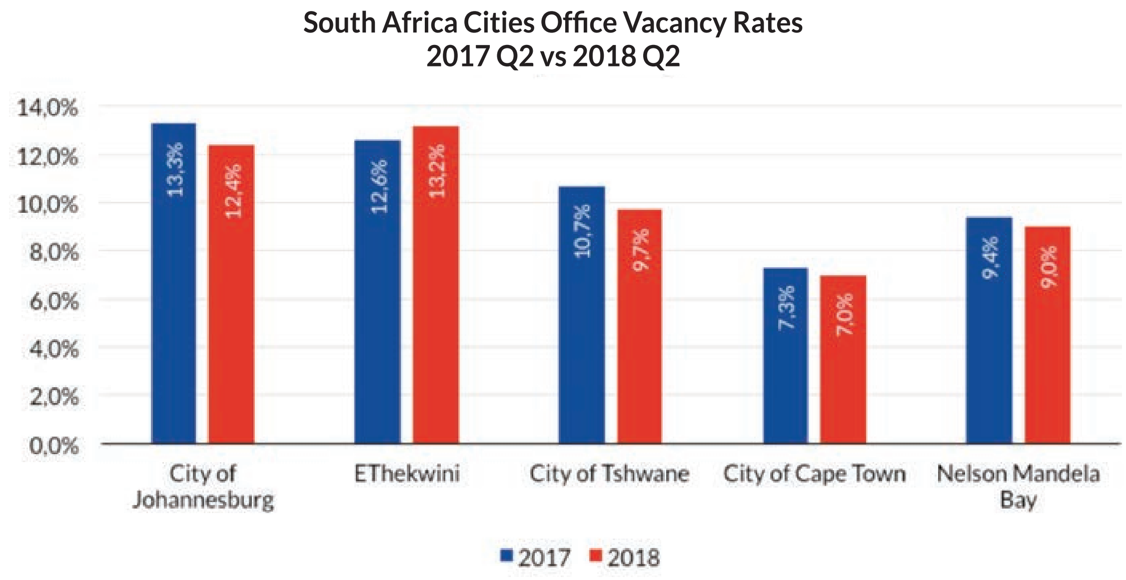
Source: Dube Trade Port, 2018

The above graph illustrates that the throughput at Dube Trade Port increased by 38% from May 2017 to May 2018. The cargo freight indicates a month-to-month increase from 1.8 million tonnes in April 2018 to 2.0 million tonnes in May 2018.

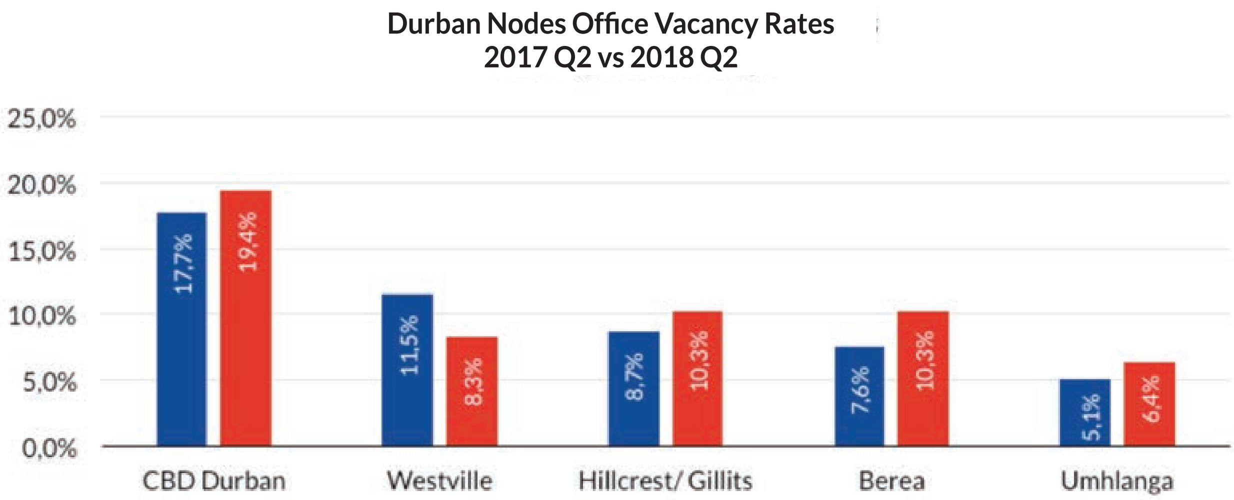
2. 'Strengthening Africa's Gateways to Trade'. https://www.pwc.co.za/en/assets/pdf/strengthening-africas-gateways-to-trade.pdf

Office Vacancies Outlook

The South African Property Owners' Association (SAPOA) reports that in the first quarter of 2018, eThekwini's office vacancy rates increased by 1.8% compared to the first quarter of 2017. The current office vacancy rate of 14.1% is a worrying increase from 12.4% in the Q4 of 2017. Office vacancies in the city have been steadily increasing, having been recorded at 10.21% in 2015.



Source: SAPOA, 2018



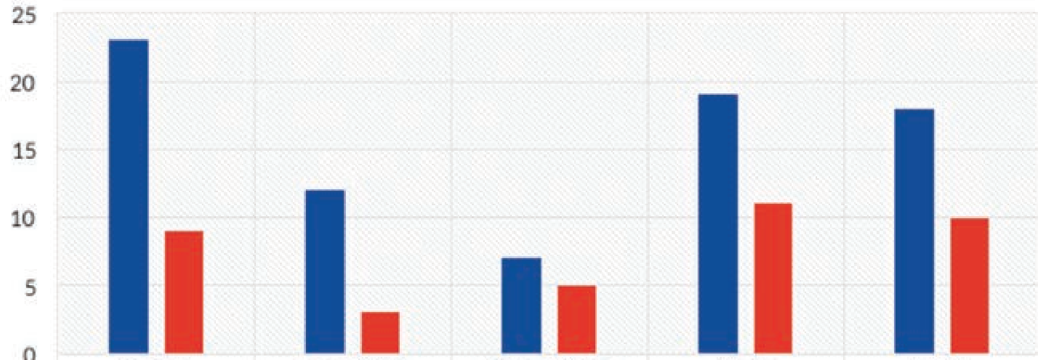
Source: SAPOA, 2018

The inner city still has the highest office vacancies in the first quarter of 2018, having increased by 3.5% year-on-year since 2017. This is flagged for intervention by the City and property owners in the inner -city.

Unequal population densities remain the key problem in comparing the above regions. Hence, it becomes difficult to draw accurate comparative conclusions.

Durban City Development Plan Overview

Approved Number of Building Plans in Durban (July 2017 to June 2018)



	Central	Inner West	Outer West	North	South
Industrial	23	12	7	19	18
Commercial	9	3	5	11	10

Source: Development Management, Development and Planning Unit, 2018

The central regional dominates industrial building plans approved, with 29% of all approved plans being from the central region. This is followed by the northern and southern regions respectively. Although the central regional dominates building plan approvals, this number decreased by 33% in the 12-month period from July 2017 to June 2018.

Commercial building plans approved are mostly situated in the northern region. The new total number of building plans approved in the central city decreased by 27% in the middle of 2018.

Exports in Africa

Trade is an important engine of economic growth and development, lifting people from poverty to prosperity in many regions and countries around the world. In Africa, this potential has not been fully realised, as the share of Africa in global trade is miniscule, at around 3%. Africa's trade is heavily concentrated on primary commodities, and is outwardly focused, with relatively lower levels of intra-regional trade than other regions around the world (18%) compared to approximately 60%, 40%, and 30% intra-regional trade in Europe, North America and ASEAN states respectively.

Key constraints to intra-regional trade include the distance between countries, lack of reliable infrastructure, lack of reliable internet access, political instability, corruption and red tape. In South Africa, particular problems relate to the cost increases and high port charges, which affect the performance of firms, as well as their position in the global economy. Back of port inefficiencies (some 90% of Africa's trade is conducted by ocean) and a heavy reliance on road based transport further add to export costs. In addition to issues faced regionally and nationally, Durban based business is faced with a lack of demand from within the city and surrounds; adding impetus to the need for demand from export markets.

The result is that only a small set of firms are able to penetrate foreign markets. For example the World Bank has established that only around 1 000 exporters account for 93% of the country's exports; while the remaining 7% of exports are produced by another 20 000 small-scale exporters. A closer look at KZN reveals that in eThekwini, firms also have limited export orientation, and lackluster export performance.

As Africa's influence in multilateral trade agreements declines, the need to promote intra-Africa regional trade becomes ever more important. A growing middle class throughout the Continent also adds to the increase in opportunity for local exporters; if challenges in exporting into the Continent are to be addressed.

Realising this, in 2010, the African Union 'Ministers of Trade' Summit endorsed a recommendation for the establishment of a pan-African free trade area, which would pave the way for the current African Continental Free Trade Area. In 2012, the African Union Summit of 'Heads of State and Government' focused on the theme of Boosting Intra-Africa Trade (BIAT) to deliberate on strategies to overcome the challenges experienced in trade. Through the BIAT programme, it is estimated that intra-Africa trade could

> As Africa's influence in multilateral trade agreements declines, the need to promote intra-Africa regional trade becomes ever more important.

increase by between 5.3% and 21.9% by 2020, increasing the prosperity of many Africans.

Currently, although there are no Africa-specific export development programmes; an array of incentive instruments are programmes available through the Department of Trade and Industry (the dti) and Trade and Investment KZN (TIKZN). Examples of some key instruments, albeit not focused on Africa, are included below:

- Capital Projects Feasibility Programme (CPFP): a cost-sharing grant that contributes to the cost of feasibility studies likely to lead to projects that will increase local exports and stimulate the market for South African capital goods and services. The grant is capped at R8 million, covering between 50% and 55% of costs of feasibility studies, with a higher incentive being offered for feasibility studies of exports to African economies.
- Export Marketing and Investment Assistance Schemes (EMIA): a grant that partially compensates exporters for export increasing activities such as market research, trade missions and the showcasing of products and services at international exhibitions. More information is available.
- Sector Specific Assistance Scheme (SSAS): a cost-sharing incentive scheme available to export councils, joint action groups and industry associations (i.e. not individual firms), where financial support is granted to organisations supporting the development of industry sectors contributing to export growth.

More information can be accessed from the dti, on the following link. https://www.thedti.gov.za/industrial_development/industrial_incentives.jsp?year=&subthemeid=25

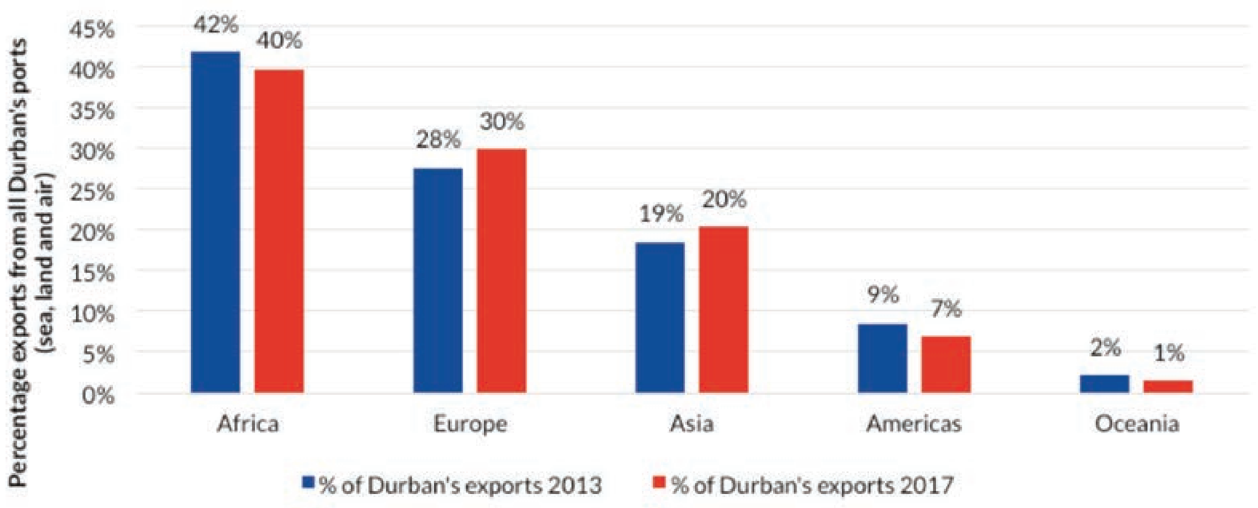
In addition to these incentives, institutions such as the Industrial Development Corporation (IDC) offer favourable loans to exporters. TIKZN has also dedicated a portal to export development and facilitation, which can be accessed from their website: http://www.tikzn.co.za.

South Africa, and especially Durban, are well positioned to be able to benefit significantly from increased regional integration and the growth and development of the Continent. The development of free trade agreements across the Continent, therefore, mean that exciting opportunities await manufacturers in the City, provided that key issues such as infrastructure and port inefficiencies are addressed together with the incentives and supporting policies that have been made available to encourage exports.

Profile of Exports into Africa

There is a significant trade imbalance between the City and the rest of the Continent in favour of Durban. Exports into Africa form 40% of all exports from the City. On the converse side, Durban imports only 5% of its goods from the rest of the Continent.

Durban's Export Destinations



Source: Quantec International Trade Statistics, 2018

The City's biggest export partners are in the SADC. This is expected, given the proximity to the City, and that both SADC and SACU are free trade areas.

Durban's Trading Partners in Africa	Value of Exports from Durban 2017
NA: Namibia	R5 449 510 000
BW: Botswana	R4 049 370 000
ZM: Zambia	R2 412 960 000
MZ: Mozambique	R2 051 060 000
ZW: Zimbabwe	R1 994 180 000
SZ: Swaziland	R1 736 450 000
LS: Lesotho	R1 270 680 000
AO: Angola	R944 210 000
TZ: United Republic of Tanzania	R867 700 000
KE: Kenya	R859 060 000

Source: Quantec International Trade Statistics, 2018

The top ten exports from the City (by rand value) are tabled below, and are topped by vehicles, vehicle parts, machinery and sugar. Demand for vehicles and vehicle parts in SADC has increased significantly. In the 15-year period from 2003-2017, demand for vehicles and parts from the City grew by almost 25% per annum (compounded growth rate). This reflects a growing middle class population in the region, as well as an increase in urbanisation and infrastructure development.

Durban's export basket into the rest of the Continent mainly includes a healthy range of manufactured goods. In addition, demand for manufactured goods from Durban is increasing further.

Products Exported from Durban	Value of Exports from Durban 2017
Vehicles other than railway stock, and parts and accessories thereof	R6 294 289 116
Nuclear reactors, boilers, machinery and mechanical appliances, etc.	R1 694 578 125
Sugars and sugar confectionery	R1 478 668 036
Electrical machinery and equipment and parts thereof, etc.	R1 303 093 745
Plastics and articles thereof	R1 300 694 142
Paper and paperboard, articles of paper pulp, etc.	R1 236 812 270
Soap, organic surface-active agents, washing preparations, etc.	R1 114 202 664
Beverages, spirits and vinegar	R1 009 376 748
Miscellaneous chemical products	R692 379 145
Animal or vegetable fats and oils, etc.	R685 083 289

Source: Quantec International Trade Statistics, 2018

African Continental Free Trade Area AfCFTA – What, When, and What Now?

On 21 March 2018, 44 African states signed the consolidated document of the African Continental Free Trade Agreement (AfCFTA), including the agreement establishing the AfCFTA, and several other related protocols.

This follows decades worth of effort by the AU to achieve the Africa 2063 vision. Part of the objectives of the Africa 2063 vision, include making Africa one market and economy – for the welfare of its citizens and regional economies. One key action goal of the vision is to 'inter-liberalise' Africa by establishing a free trade area, where business people and investments will move around freely; ultimately creating a Continent-wide customs union.

The timelines are such that the AfCFTA will be effective once 22 signatories have ratified the agreement. So far, six countries have ratified, having done so before the annexures on schedules of tariff concessions and services commitments have been submitted (details such as tariffs, etc., have not yet been established). These are meant to be submitted in January 2019, but countries are free to ratify

Countries Ratified	Date*
Kenya	10 May 18
Ghana	10 May 18
Rwanda	26 May 18
Niger	8 June 18
Chad	1 July 18
eSwatini	1 July 18

* Date on which the AfCFTA instrument of ratification was deposited with the AUC Chairperson.

> "In essence, the CFTA will make South African products cheaper for African countries to buy, and it will be cheaper to buy products from within Africa."

before or after this. To date, 49 countries have signed and agreed in principle to the AfCTA plans.

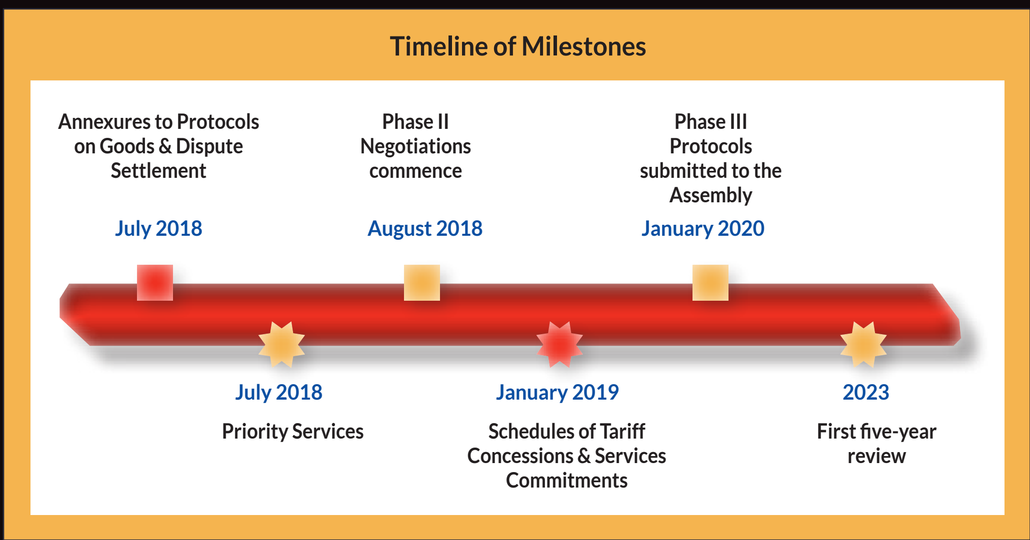
The implications of signing are that countries will have to progressively reduce, and ultimately do away with their tariffs completely, from 90% of their imports from participating African countries. This will have to occur within five years of ratification[3]. There will be a 10-year period to reduce sensitive product duties to zero[4]. This excludes other fees such as VAT and excise duties. Other goals include eliminating non-tarrif barriers, and developing value chains between countries.

In essence, the CFTA will make South African products cheaper for African countries to buy, and it will cheaper to buy products from within Africa. This should increase the amount of South African and Durban exports, particularly manufactured goods.

In addition to this, countries will be able to negotiate for an exclusion list; on which no tariff reductions will be applied.

However, this will be subject to a concentration clause which will ensure that no one sector is largely exempted from tariff removals.

With regard to existing regional economic communities (RECs) – four of of which South Africa is a member (SACU, SADC, Zimbabwe SA Bilateral Agreement, and potentially, the Tripartite Free Trade Area), where existing tariff agreements are in place that are more liberal than those proposed by the CFTA, these will continue. Where tariffs are less liberal, they will be overridden by CFTA rules. RECs will play a role in promoting and implementing the CFTA.



3. This has been dropped to 85% of import lines for least developed countries (LDCs) within 10 years of ratification, and 15 years to drop further to 90%.
4. Thirteen years for LDCs (Angola, Benin, Burkina Faso, Burundi, Cape Verde, Central African Republic, Chad, Comoros, Dem. Rep. of Congo, Djibouti, Equatorial Guinea, Eritrea, Ethiopia, Gambia, Guinea, Guinea-Bissau Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mozambique, Niger, Rwanda, Sao Tome and Principe, Senegal, Sierra Leone, Somalia, Sudan, Tanzania, Togo, Uganda and Zambia). Thirty of 44 countries that have signed are LDCs.

Export Opportunities for eThekwini Manufacturers

In what product categories do export opportunities exist for Durban-based companies?

Using the International Trade Centre's (ITCs) export potential indicator (EPI), the following is an illustration of the size of untapped export potential available on the Continent to South African producers[5]. Only the top untapped export potential in sectors marked as priority by the Incentives Policy and the Durban Investment Promotion Strategy have been listed.

Motor Vehicles and Parts
R47,95bn

Footwear
R1,09bn

Chemicals
R19,18bn

Alcoholic Beverages
R15,07bn

Trains
R653,49mn

Unprocessed Cereal
R3,75bn

Apparel
R3,11bn

Wood Products
R1,68bn

Electronic Equipment
R3,09bn

Boats and Parts
R811,04mn

Pharmaceutical Components
R2,89bn

Vegetable Oils and Fats
R2,38bn

Other Textile Products
R1,17bn

Non-alcoholic Beverages
R6,34bn

5. ITC provides a service which, among other services, assists manufacturers, governments, etc. to understand export opportunities available to them at the country level. It uses data from UN Comtrade, and a detailed methodology that takes into account supply, demand and ease of trade. The ITC's export potential indicator (EPI) identifies products in which the exporting country has already proven to be internationally competitive and which have good prospects of export success in a given target market.

Where in Africa can Durban-based manufacturers export these products to?

Zooming in further, according to the EPI, the most untapped potential available to Durban exporters for the motor vehicles and parts industry on the Continent is found in Namibia (US$ 139mn), Botswana (US$ 81.6mn) and Zambia (US$ 57.5mn).

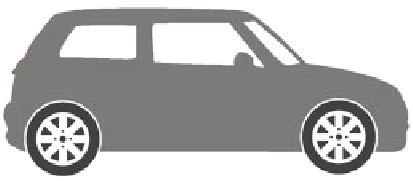
Manufacturers of (non-alcoholic) beverages in the City should consider exporting to Botswana, Namibia, and Zimbabwe: US$31.6mn, US$21.4mn, US$15.9mn worth of export potential are available to Durban exporters in these industries, respectively.

Chemicals manufacturers, particularly polypropylene (in primary form), cleaning chemicals, insecticides and related manufacturers, have potential to export to Zimbabwe (US $35mn), Zambia (US$ 37.4mn) and Botswana (US$ 26.7mn).

Where can I access more detailed information?

The above opportunities are summarised highlights of the export potential on the Continent. Detailed information on export opportunities, including a wider range of exact products and countries can be accessed on the International Trade Centre website, on http://www.intracen.org/.

TIKZN offers personalised advice and company level consultations on exact export opportunities to manufacturers in the province, through the Trade DSM Decision Support Model. TIKZN also offer general exporter assistance and resources through the KZN Export Information Portal, such as export readiness tools, export incentives, and trade delegations. To access this information, visit http://www.exportkzn.co.za/. Exporters, emerging exporters, freight forwarders, industry associations and all other players involved in the export industry are encouraged to register by clicking on the 'register' link on this same url.



Most potential available to Durban exporters for the motor vehicles and parts industry on the Continent is found in

Namibia* (US$ 139mn)	Botswana (US$ 81,6mn)	Zambia (US$ 57,5mn)

* Untapped exports potential per country

Manufacturers of (non-alcoholic) beverages in the City

should consider exporting to

Botswana (US$31,6mn)	Namibia (US$21,4mn)	Zimbabwe (US$15,9mn)

Manufacturers of cleaning chemicals, insecticides and related products

have potential to export to

Zimbabwe (US $35mn)	Botswana (US$ 26,7mn)	Zambia (US$ 37,4mn)

Q&A with an Exporter

First-hand experience is arguably the best teacher. With this in mind, we approached Mr Damian Judge, Financial Director of Kaytech Engineered Fabrics to provide The Durban EDGE readers with an overview of hands-on experience of trading on the Continent; including opportunities, challenges, dos and don'ts, and anything else he has learnt that may equip other manufacturers. This conversation was initially held at the 2017 KZN Manufacturing Indaba, where a panel of exporters shared their real experiences with other manufactures keen to learn. Kaytech was specifically re-invited to feature in The Durban EDGE due to its impressive direct experience, inspiring business profile, knowledge of exporting, and their staff's approachable demeanour and willingness to impart export wisdom to other local businesses.

EDGE: Please explain what your business is, what you produce, and how long you've been operating?

Judge: Kaytech is a 100% local geosynthetics manufacturer that has been producing material for the civil construction, infrastructure development, mining, agricultural and retail sectors since 1978.

EDGE: As a Durban-based business, what made you decide to export into countries in the rest of the Continent? What other countries do you export to?

Judge: The local sectors we service have undergone (and continue to undergo) difficult trading conditions. The decision to explore markets outside of South Africa, therefore, became a necessity. As a result, we have invested in additional capacity, which is surplus to the needs of the South African market. This is specifically to target the export market and grow our footprint globally. Apart from Africa, we currently export to New Zealand on a regular basis and have made some ad-hoc shipments to the United Arab Emirates and the Philippines.

EDGE: Was it easy for you to navigate your way into the export business? What are some of the best places to get support (e.g. government departments, agencies, associations)?

Judge: It certainly isn't easy to navigate the export space, especially as a fairly new entrant! You are up against global players that have been exporting for a number of years and have established relationships and channels to the various markets. In the local market, you know your competition and you know and have probably seen their premises. In the export market, your competition can come from anywhere.

Having the support of government, both locally and in the countries you are targeting, has proven to be very useful depending on the structure and the team in the specific country as there is a lack of consistency across the various embassies through which you have to navigate. There are a number of associations and private companies that we have called on that have provided us with tremendous support and insight on how to break into a market and it is crucial that any company trying to export makes use of these resources.

We have also called on the experience of other local companies who have made a success of exporting and 'picked their brains' on the dos and don'ts. Being able to get this first-hand knowledge has proven to be a valuable tool for us.

EDGE: What, in your opinion, are some of the best opportunities for export?

Judge: We are specifically tracking infrastructure development and mining growth, so that paints Africa as an exciting opportunity. On the infrastructure side, East

African countries have some very ambitious programmes, so we are investing a lot of time and effort into this region. On the mining front, Southern and Western Africa are beginning to thrive again as the oil price starts to rise, so we are keeping close to developments in these countries.

Further afield and for many of the same reasons as above, South America holds a lot of potential. The key economies in the region seem to be getting their economic growth back on track through political stability, so we are putting our feelers out into this space.

EDGE: What are some of the top dos and don'ts that you would like Durban or South African- based businesses to bear in mind when trading across the Continent?

Judge: The first thing that we noted was that we need to commit to a region. There is a perception that South African companies only look to Africa when things are going well, but when times get tough, they pull out. To be successful on the Continent, you need to commit long-term to the region and be present in the country on a regular basis.

It is also important to understand that many countries across the Continent have been importing from Europe and Asia for a number of years and are very resourceful. Generally, South African companies are late to the party, if I can put it that way, which means we actually have to work harder at convincing companies that they need to give us a chance. Non-African countries have invested a lot of time and money in developing the channels to market in Africa and we need to put in the travel, the time and the money to create our own channels. Although we take it for granted that 'Local is Lekker'; we need to start from scratch to convince others.

> "Probably the most important point to note is that you or your company need to adapt to the business culture in the country you are targeting and not try and force our South African business culture on them."

> "A key strategy in achieving this is to partner with a local company that is as close as possible a fit with your business. This is the first step in successfully marketing your business in a new country or city and the step you should invest the most time and effort in."

Probably the most important point to note is that you or your company need to adapt to the business culture in the country you are targeting and not try and force our South African business culture on them.

Every country in Africa operates in its own way despite what we may believe, and you have to get up to speed with those intricacies as quickly as possible in each country. A key strategy in achieving this is to partner with a local company that is as close as possible a fit with your business. This is the first step in successfully marketing your business in a new country or city and the step you should invest the most time and effort in. Finding the right partner will give you a better chance of success, whereas partnering with the wrong company will guarantee failure.

For more information or to continue the conversation, contact:
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Email: kaytech@kaymac.co.za
Website: http://www.kaytech.co.za/

KAYTECH ENGINEERED FABRICS

Durban Youth #OpenAfrica

During the World Economic Forum on Africa 2017 that took place in Durban, a group of young, motivated 'Global Shapers' decided to embark on an initiative that would advocate for the quick introduction of the Continental Free Trade Area by the African Union. This initiative, called 'Open Africa', sought to innovatively provide awareness for advocating for an open Africa. The team travelled across Africa by road; tracking trade routes, and capturing their experiences at every border post and corridor. The goal was to capture the constraints to cross-border road travel and make a case for the need of African governments to improve infrastructure and legislation that would allow for increased Intra-African trade.

The Open Africa initiative managed to create an ecosystem for African youth to work collectively in identifying solutions to Intra-Africa trade. The youth held 21 conferences, targeting key policymakers in 21 different African cities and countries in the lead up to the signing of the Continental Free Trade Area (CFTA) in March 2018. The Initiative now focuses on skilling young entrepreneurs with export readiness so they can take on the new African frontier ushered in by the signing of the AfCFTA.

The Open Africa team having a meeting on Intra-Africa Trade at the African Union offices in Addis Ababa Ethiopia after travelling there by road from South Africa (Durban).
From Left: Justice Matarutse, World Economic Forum Global Shapers Community – Durban Hub Curator (South Africa); Sebastian Collins, WEF Global Shapers – Monrovia Hub (Liberia); Mesfin Tessema, African Union Director for Strategic Policy Planning, Monitoring and Evaluation, International Cooperation and Resource Mobilization (Ethiopia); Ahmed EL-Basheer, African Union Director for Citizens and Diaspora Directorate (Sudan); Chandapiwa Sisila, WEF Global Shapers Community – Gaborone Hub (Botswana); and Nkululeko Mthembu, WEF Global Shapers ¬ Durban Hub (South Africa).

For more information on this exciting initiative contact, The World Economic Forum Global Shapers Community Durban Hub on: Cell: 079 705 3809
Email: info@durbangs.co.za or justice_matarutse@outlook.com
FB: www.facebook.com/openafricags
Tel: +27 31 717 2300, Email: kaytech@kaymac.co.za, Website: http://www.kaytech.co.za/

TIKZN Trade Development Initiatives in Africa: KZN Companies Intensify Global Trade with Ghana Mission

New markets for KwaZulu-Natal companies and a boost for the Province's Trade, Investment Promotion and Economic Development Programme (TIPED) were some of the spin-offs of a recent successful TIKZN trade mission to Ghana.

Following a fruitful visit to Ghana in 2016, TIKZN, which promotes KZN as an investment destination and assists local companies to access international markets, is intensifying efforts to promote foreign trade.

Endorsed by the KZN Department of Economic Development, Tourism and Environmental Affairs, the objective of the latest trade mission from 28 February to 7 March 2018 was to meet organisations that expressed interest in KZN products and to consolidate tangible leads that would translate into lucrative export orders. Seven KZN companies participated in the Ghana International Trade Fair in Accra, supported by TIKZN's BEE Fund.

As a direct result of the Ghanaian trade mission, Leo Garments, a manufacturer of protective outerwear – from ballistic body armour to chemical, mining, blood and fat and rain protective wear – is engaging with two distributors.

"More importantly, we are negotiating an agreement for a company to represent Leo Garments in the West African region. We hope to conclude this agreement by the end of May when the potential agent visits South Africa. An agent will develop distributors resulting in a much larger distributor network," said Ravesh Rama, Managing Director of Leo Garments.

Sibongile Panky Silwanyana, Key Accounts Manager for Home Concept Furniture Manufacturing, said: "We hope to broaden our scope with a small kitchen manufacturing businesses in Ghana. I feel confident that the leads we obtained will definitely contribute to new markets, improve our efficiency and increase our employment."

"We aim to do business with the people of Ghana and will strive towards providing a high standard of quality kitchens at affordable prices," she said.

At the Ghana International Trade Fair in Accra were (from left): Sibongile Silwanyana, Key Accounts Manager Home Concept Furniture Manufacturing; Frank De-Destiny, Chief Executive Potters Concrete Products, Ghana; Nompumelelo Hlela, South African High Commission in Ghana; and Andrew Milne, Director of Home Concept Furniture Manufacturing.

Neville Matjie, Acting Chief Executive Officer at TIKZN, said: "Our previous visit to Ghana generated some tangible leads and the need to further cement relationships with key stakeholders to catapult trade relations between the two countries cannot be overemphasised. The marketing of our TIPED initiative also received a major boost during our discussions with the Ghanaian Investment Promotion Centre (GIPC), which falls directly under the Presidential Office."

During the talks between TIKZN's Executive Manager for Corporate Services, Mxolisi Miya, and Edward Ashong-Lartey, GIPC Director for Investor Services, a serious commitment was given by the Ghanaians to participate in the programme.

Christina Pillay, Export Promotion Officer at TIKZN, said: "Linkages for KZN companies have been created with members of various Ghanaian chambers and agencies who have the proven distribution channels and local infrastructure to include a KZN brand or product into their portfolio. With both Ghana and South Africa showing support for the new CFTA, we look forward to increasing trade flows that are not reliant on the volatile prices of commodities and lifting trade barriers inhibiting intra-Africa trade."

Critical Thought: Are there Negative Impacts to Inter-liberalising Trade in Africa?

While the aim of liberalising trade between countries is to promote economic development and growth, numerous studies have concluded that tariff cuts and eventually tariff elimination may in fact have a negative effect on developing economies. This is particularly the case when developing economies have a weak domestic tax base, and are heavily reliant on revenue from trade tariffs to fund their developmental mandates. For example, 28% of total tax revenues in Africa over the 1994- 2004 decade were made up of international trade taxes, with the same being 0.8% for OECD countries. Eliminating import tariffs means that governments have to develop alternative tax revenue sources – but countries with poor populations, limited local industries, large informal economies, and inefficient tax systems, are likely to struggle to do so. For example, 93% of Malawi's labour force is employed in the informal sector. Malawi, therefore, cannot recover much of its lost import tariffs by increasing PAYE tax on individuals. It is also easier for developing governments to collect trade tax, as these are usually manually collected at the point of entry. This is in contrast with domestic taxes, which require efficient and innovative systems and resources that many developing economies do not have.

"Eliminating import tariffs means that governments have to develop alternative tax revenue sources – but countries with poor populations, limited local industries, large informal economies, and inefficient tax systems, are likely to struggle to do so."

Thirty of the AfCFTA's 44 signatory economies are Least Developed Countries (LDCs), meaning they have been classified by the UN as having significantly low incomes, being highly vulnerable to external shocks, and having






severe structural impediments to their growth. In this case, South Africa's net revenues are not likely to be negatively affected by the drop in import tariffs, as only 2% of South Africa's imports are from the rest of the Continent. However, countries on the Continent are highly dependent on Africa's (and in particular, South Africa's) goods, and not being able to receive tariff revenues from these imports is likely to reduce their government budgets.

The concern is that if the reduction in government revenues negatively affects neighbouring governments' developmental programmes significantly enough, this may have an impact on the development of the markets to which Durban's firms wish to export[6]. Populations and markets across the Continent need to develop in order to make exporting within the Continent sustainable. Less revenue generated by governments means that less can be done to take their populations out of poverty, and poor populations are less able to buy Durban's exports. **Thus, if not carefully implemented, free trade agreements can become self-defeating.** Further discussion on this topic, and recommendations on how developing governments can mitigate negative impacts of trade liberalisation can be found in discussion articles below:

Caliari, 2007. The fiscal impacts of trade liberalization. Rethinking Bretton Woods Project. Center of Concern, Washington DC. https://sarpn.org/documents/d0002552/Trade_liberalization_Caliari_Mar2007.pdf

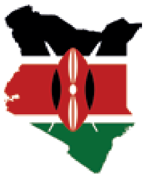
Khattry and Rao, 2002. Fiscal Faux Pas?: An Analysis of the Revenue Implications of Trade Liberalization. University of Massachusetts, Amherst, MA, USA

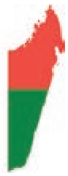
6. The first concern is the impact of a drop in government revenues on the livelihoods of people in developing countries. However, for the purposes of this publication, only the impact on Durban's exports to the rest of the Continent are discussed.

Appendix

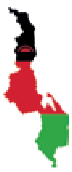
Durban's Top Exports into Co-signatory AfCFTA Countries, Expected Changes in Tariffs per Country, and Projected Timelines

Countries that have Signed CFTA	Total Value of Exports from Durban in 2017	Top 3 Products Exported from Durban			Change Expected from CFTA Policy[7]	Length of Time Allocated to Drop Tariffs
Algeria	R8 270 000	Seeds & plants	Perfumery	Inorganic chemicals	Tariffs to be dropped to R0 on 90% of imports	5 years
Angola	R944 210 000	Soaps & waxes	Beverages	Electric machinery	None. Already R0 tariffs due to SADC	10 years
Benin	R38 430 000	Fruit & nuts	Medical instruments	Soaps & waxes	Tariffs to be dropped to R0 on 90% of imports	5 years
Botswana	R4 049 370 000	Vehicles & parts	Sugars	Rubbers	None. Already R0 tariffs due to SACU	5 years
Burkina Faso	R24 750 000	Metal articles	Machinery & parts	Fruit & nuts	Tariffs to be dropped to R0 on 85% of imports	10 years
Cameroon	R97 030 000	Other chemicals	Plastics	Beverages	Tariffs to be dropped to R0 on 90% of imports	5 years
Cape Verde	R4 670 000	Perfumery	Soaps & waxes	Toys & games	Tariffs to be dropped to R0 on 85% of imports	10 years
C.A.R	R390 000	Vehicles & parts	Apparel	Machinery & parts	Tariffs to be dropped to R0 on 85% of imports	10 years
Chad	R3 550 000	Vehicles & parts	Food preparations	Machinery & parts	Tariffs to be dropped to R0 on 85% of imports	10 years
Comoros	R25 750 000	Sugars	Diary, eggs, honey	Woods	Tariffs to be dropped to R0 on 85% of imports	10 years
Congo	R137 280 000	Prepared grains, etc	Seeds & plants	Beverages	Tariffs to be dropped to R0 on 85% of imports	10 years
Cote d'Ivoire	R99 890 000	Electric machinery	Metal articles	Other chemicals	Tariffs to be dropped to R0 on 90% of imports	5 years
D.R.C	R591 150 000	Mineral fuels	Machinery & parts	Electric machinery	None. Already R0 tariffs due to SADC	10 years
Djibouti	R64 910 000	Vehicles & parts	Perfumery	Soaps & waxes	Tariffs to be dropped to R0 on 85% of imports	10 years
Egypt	R45 200 000	Inorganic chemicals	Iron & steel	Papers	Tariffs to be dropped to R0 on 90% of imports	5 years

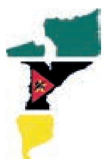



Countries that have Signed CFTA	Total Value of Exports from Durban in 2017	Top 3 Products Exported from Durban			Change Expected from CFTA Policy[7]	Length of Time Allocated to Drop Tariffs
Equatorial Guinea	R3 040 000	Machinery & parts	Beverages	Soaps & waxes	Tariffs to be dropped to R0 on 85% of imports	10 years
Ethiopia	R214 850 000	Vehicles & parts	Machinery & parts	Other chemicals	Tariffs to be dropped to R0 on 85% of imports	10 years
Gabon	R171 500 000	Vehicles & parts	Prepared grains, etc	Animal fodder	Tariffs to be dropped to R0 on 90% of imports	5 years
The Gambia	R28 760 000	Prepared grains, etc	Fruit & nuts	Soaps & waxes	Tariffs to be dropped to R0 on 90% of imports	5 years
Ghana	R834 670 000	Vehicles & parts	Electric machinery	Food preparations	Tariffs to be dropped to R0 on 90% of imports	5 years
Guinea	R37 400 000	Metal articles	Machinery & parts	Plastics	Tariffs to be dropped to R0 on 85% of imports	10 years
Kenya	R859 070 000	Vehicles & parts	Sugars	Cereals	Tariffs to be dropped to R0 on 90% of imports	5 years
Lesotho	R1 270 700 000	Vehicles & parts	Sugars	Soaps & waxes	None. Already R0 tariffs due to SACU.	10 years
Liberia	R37 070 000	Machinery & parts	Seeds & plants	Electric machinery	Tariffs to be dropped to R0 on 85% of imports	10 years
Libya	R5 360 000	Perfumery	Inorganic chemicals	Papers	Tariffs to be dropped to R0 on 85% of imports	10 years
Madagascar	R1 009 380 000	Beverages	Sugars	Vehicles & parts	None. Already R0 tariffs due to SADC	10 years
Malawi	R746 750 000	Machinery & parts	Plastics	Papers	None. Already R0 tariffs due to SADC	10 years
Mali	R30 450 000	Machinery & parts	Fruit & nuts	Dyes & paints	Tariffs to be dropped to R0 on 85% of imports	10 years
Mauritania	R3 780 000	Machinery & parts	Apparel	Metal articles	Tariffs to be dropped to R0 on 85% of imports	10 years
Mauritius	R606 670 000	Vehicles & parts	Electric machinery	Plastics	None. Already R0 tariffs due to SACU.	5 years
Morocco	R30 990 000	Papers	Other chemicals	Other textiles	Tariffs to be dropped to R0 on 90% of imports	5 years
Mozambique	R2 048 570 000	Electric machinery	Vehicles & parts	Machinery & parts	None. Already R0 tariffs due to SADC	10 years







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Namibia	R5 449 540 000	Vehicles & parts	Sugars	Apparel	None. Already R0 tariffs due to SACU	5 years
Niger	R80 000	Plastics	Apparel	Medical instruments	Tariffs to be dropped to R0 on 85% of imports	10 years
Rwanda	R122 470 000	Vehicles & parts	Furniture, etc.	Seeds & plants	Tariffs to be dropped to R0 on 85% of imports	10 years
Saharawi Republic	No exports	No exports	No exports	No exports	Tariffs to be dropped to R0 on 90% of imports	5 years
São Tomé and Principe	No exports	No exports	No exports	No exports	Tariffs to be dropped to R0 on 85% of imports	10 years
Senegal	R57 240 000	Vehicles & parts	Fruit & nuts	Inorganic chemicals	Tariffs to be dropped to R0 on 85% of imports	10 years
Seychelles	R235 460 000	Woods	Metal articles	Prepared grains, etc	None. Already R0 tariffs due to SADC	5 years
Somalia	R32 240 000	Food preparations	Seeds & plants	Soaps & waxes	Tariffs to be dropped to R0 on 85% of imports	10 years
South Sudan	R0	Footwear	-	-	Tariffs to be dropped to R0 on 90% of imports	5 years
Sudan	R41 460 000	Medical instruments	Vehicles & parts	Papers	Tariffs to be dropped to R0 on 85% of imports	10 years
Swaziland	R1 736 450 000	Vehicles & parts	Machinery & parts	Plastics	None. Already R0 tariffs due to SACU	5 years
Tanzania	R867 720 000	Iron & steel	Papers	Vehicles & parts	None. Already R0 tariffs due to SADC	10 years
Togo	R45 240 000	Seeds & plants	Plastics	Prepared grains, etc	Tariffs to be dropped to R0 on 85% of imports	10 years
Tunisia	R21 270 000	Vehicles & parts	Papers	Other chemicals	Tariffs to be dropped to R0 on 90% of imports	5 years
Uganda	R519 160 000	Medical instruments	Vehicles & parts	Papers	Tariffs to be dropped to R0 on 85% of imports	10 years
Zambia	R2 413 070 000	Vehicles & parts	Machinery & parts	Electric machinery	None. Already R0 tariffs due to SADC	10 years
Zimbabwe	R1 994 180 000	Plastics	Vehicles & parts	Soaps & waxes	Tariffs to be dropped to R0 on 90% of imports	5 years

7. Excludes sensitive products, VAT and excise duties.

Looking Ahead to the Next Issue

The Durban EDGE looks at topical and current issues that affect decision-makers in eThekwini, and is produced by the eThekwini Economic Development and Investment Promotion Unit's Policy, Strategy, Information and Research (PSIR) Department.

For feedback or queries, email Tshegang Chipeya on tshegang.chipeya@durban.gov.za or call 031 311 4247.

edtea
Department: Economic Development, Tourism and Environmental Affairs
PROVINCE OF KWAZULU-NATAL

TRADE & INVESTMENT KWAZULU-NATAL
EXPORT WEEK

Think Global: KZN the African Trade Hub

A Full Week of Activities Dedicated to Growing KwaZulu-Natal's Export Businesses and Industries

KZN Export Week is an annual programme of Trade Invest KZN (TIKZN) developed to recognise, promote and assist with growing KwaZulu-Natal's export businesses and industries.

Through a comprehensive programme of activities, it will provide professional development and information on growth sectors and market opportunities to KwaZulu-Natal's new and existing exporters and internationally focused businesses.

Export Week will highlight the significance of exporting to the KwaZulu-Natal economy and will aim to celebrate the success of KwaZulu-Natal exporters. Export Week KZN will be filled with information and networking session of interest for emerging exporters, existing exporters, and seasoned exporters.

Meet trade partners and associations who can help you to reach new markets

Network and build new relationships with fellow attendees from across the continent

Hear some of the top business minds share their tips and stories on how to build a global business

EVENT DETAILS

Date: 1 - 5 Oct 2018
Venue: Durban ICC/Inkosi Albert Luthuli International Convention Centre

Opening times

- **Export Essentials**: 1 October: 9am – 12pm
- **Masterclass**: 1 October: 12pm – 5pm
- **Summit**: 2 – 3 October: 9am – 5pm
- **Expo**: 2 - 3 October: 9am – 5pm
- **Exporter of the Year Awards**: 4 October
- **Golf challenge**: 5 October

To register, visit: http://www.tikzn.co.za/open.php?cat=events&page=exportweek

Trade Invest KZN will be offering 100 FREE places to emerging exporters!
To find out if you qualify email: sakimagoxo@exportweek.co.za

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DURBAN EDGE

www.durban.gov.za

"Make better informed decisions with cutting-edge economic insight."