

# Africa e Affari

Rivista mensile  
sul continente del futuro

## AFCFTA

AN OPPORTUNITY NOT ONLY FOR  
AFRICA

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Rivista mensile  
sul continente del futuro

Ottobre 2020

»» Zoom / Rwanda

## Ambiente e tecnologia, Kigali fa da apripista

Africa e Affari / Anno 8 numero 8 / Ottobre 2020 / € 10 / ISSN 2465-2490



Focus

## Africa e logistica

Viaggio ragionato lungo la spina dorsale del commercio



# WHICH MARKET?

## DEMOGRAPHIC GROWTH



## MEGATRENDS

**01**

**ECONOMIC**

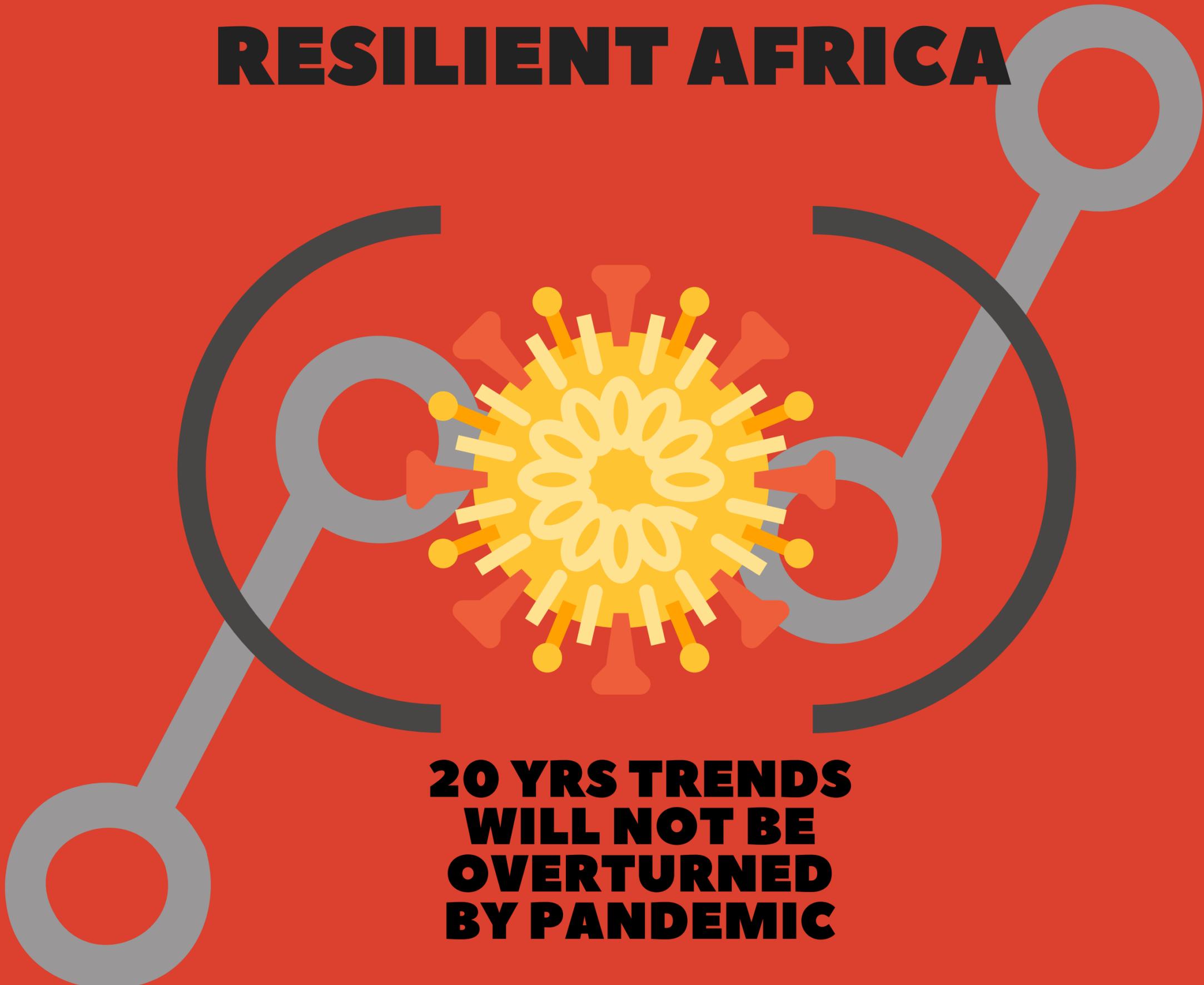
**02**

**DEMOGRAPHIC**

**03**

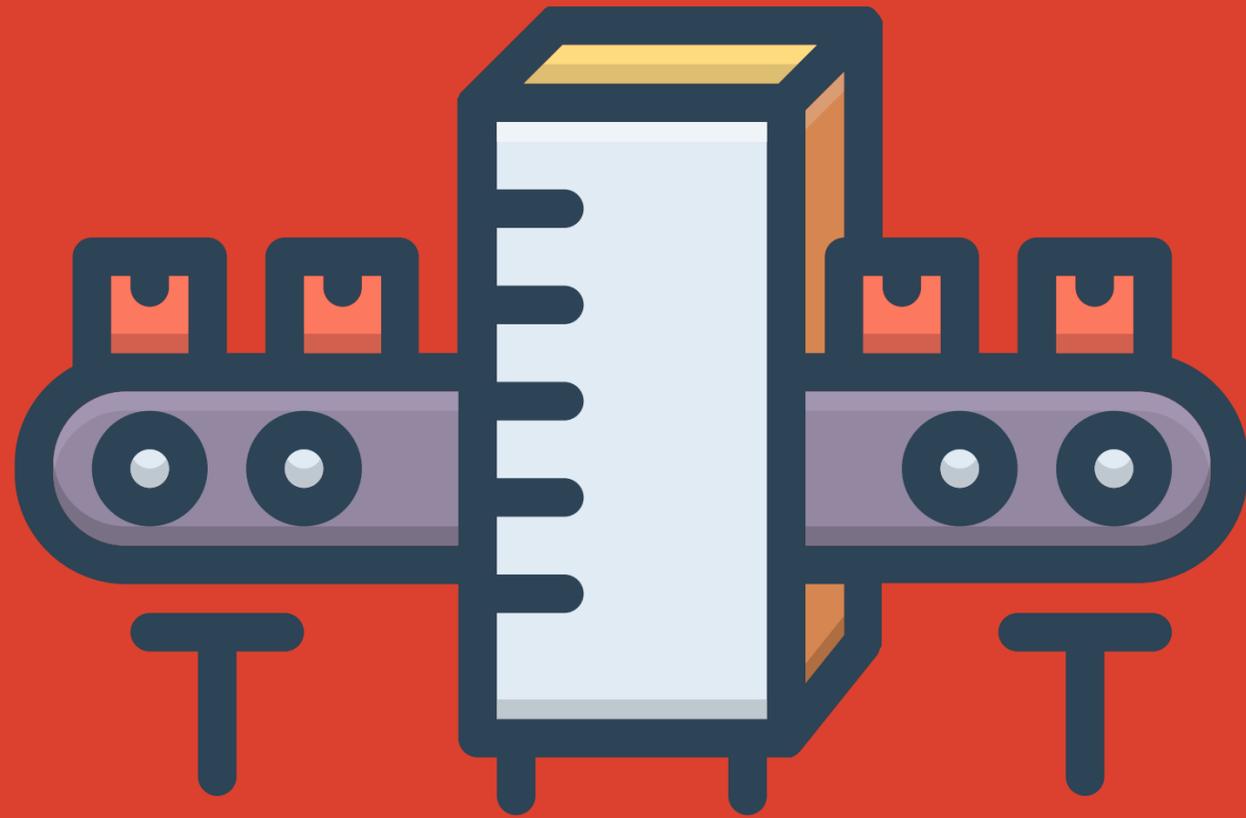
**URBAN**

# RESILIENT AFRICA



**20 YRS TRENDS  
WILL NOT BE  
OVERTURNED  
BY PANDEMIC**

# **REACT AND GROWTH: COVID 19 HAS THE POWER TO ACCELERATE TWO IMPORTANT PROCESS ALREADY GOING ON**



**production and  
transformation inside  
african countries**



**growth of the internal trade  
at continental and regional  
level**

COVID-19 has amplified the risks of the world's heavy dependence on a few countries for global supply chains of key products.

African countries could position themselves better to attract manufacturing activities as global manufacturing firms seek to diversify geographically the sources of supply.

For this, African countries need to continue to scale up their infrastructure, improve logistics, invest more in skills development, reduce the cost of doing business and embrace digital technology more broadly, including by leveraging the AfCFTA.



# WHICH COMMERCE?

**760 Bln**

Total trade from Africa to the rest of the world averaged \$ 760 billion at current prices in 2015-2017, compared to \$ 481 billion from Oceania, \$ 4.109 billion from Europe, \$ 5.140 billion from America and \$ 6.801 billion from Asia.

**16,6%**

Intra-African exports were 16.6% of total exports in 2017, compared to 68.1% in Europe, 59.4% in Asia, 55.0% in America and 7.0% in Oceania .

**80/90%**

The share of exports from Africa to the rest of the world ranged from 80% to 90% in 2000-2017. The only other region with a greater dependence on exports from the rest of the world is Oceania.

**2%**

Intra-African trade, defined as the average of intra-African exports and imports, was around 2% in the period 2015-2017, while comparative data for America, Asia, Europe and Oceania were, respectively, 47%, 61%, 67% and 7%.

# WHICH COMMERCE?

**SINCE 2008, AFRICA, ALONG WITH ASIA, IS THE ONLY REGION WITH AN UPWARD TREND IN INTRA-REGIONAL TRADE**

## REGIONS

intra-regional trade was higher in:

- **SADC (\$ 34,7 miliardi),**
- **CEN-SAD (\$ 18,7 miliardi),**
- **ECOWAS (\$ 11,4 miliardi),**
- **COMESA (\$ 10,7 miliardi),**
- **AMU (\$ 4,2 miliardi),**
- **EAC (\$ 3,1 miliardi ),**
- **IGAD (\$ 2,5 miliardi)**
- **ECCAS (\$ 0,8 miliardi).**

## REGIONS IN %

As regards the share of intra-regional trade in total trade with Africa, there were deeper levels of integration in

**SADC (84,9%)**

**COMESA (59,5%)**

**CEN-SAD (58,4%)**

**ECOWAS (56,7%)**

**AMU (51,8%),**

**IGAD (49,0%), EAC (48,3%) ed**

**ECCAS (17,7%)**

# WHICH OBSTACLES ?

## REGULATIONS/POLICY

Committed to urgent and necessary national development, many countries tend to defend their nascent manufacturing and processing industries.

Political decision makers face two conflicting pressures:

- the understanding of a supranational need to combat fragmentation
- the defense of national economic subjects

## INFRASTRUCTURES

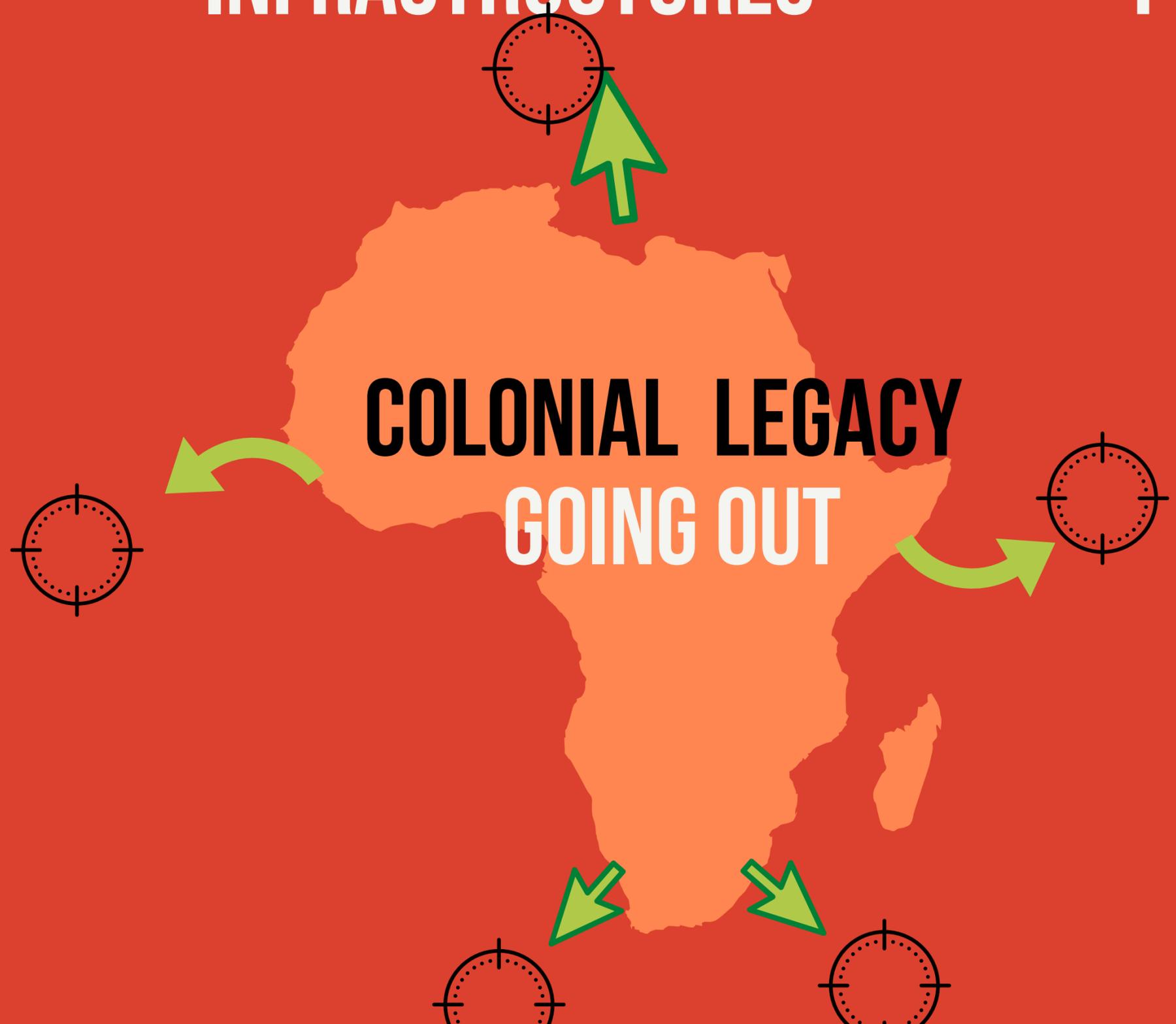
The existing infrastructures still respond to the colonial logic of exporting goods.

The construction of new infrastructures is expensive given the size, the market still finds exports easier, the pressures on debt make it increasingly difficult to finance (and maintain) these infrastructures.

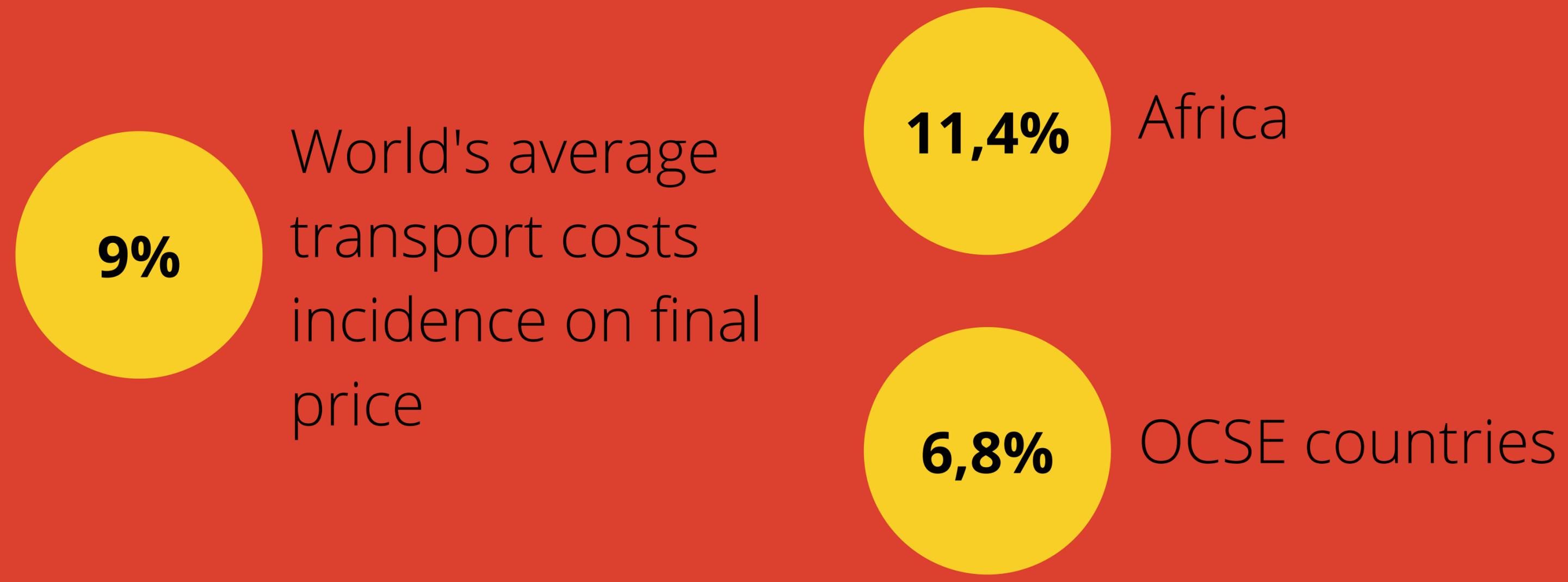
# AFRICA'S INFRASTRUCTURES

# PIDA

# PROGRAM INFRASTRUCTURE DEVELOPMENT IN AFRICA



# TRANSPORTS



# Logistics Performance Index della Banca mondiale: testa della classifica e posizioni occupate dall'Italia e dai Paesi africani

| Paese          | Anno | Posizione occupata | Punteggio riportato | Dogane | Infrastrutture | Spedizioni internazionali | Servizi di logistica | Tracking & tracing | Puntualità |
|----------------|------|--------------------|---------------------|--------|----------------|---------------------------|----------------------|--------------------|------------|
| Germania       | 2018 | 1                  | 4,20                | 4,09   | 4,37           | 3,86                      | 4,31                 | 4,24               | 4,39       |
| Svezia         | 2018 | 2                  | 4,05                | 4,05   | 4,24           | 3,92                      | 3,98                 | 3,88               | 4,28       |
| Belgio         | 2018 | 3                  | 4,04                | 3,66   | 3,98           | 3,99                      | 4,13                 | 4,05               | 4,41       |
| Italia         | 2018 | 19                 | 3,74                | 3,47   | 3,85           | 3,51                      | 3,66                 | 3,85               | 4,13       |
| Sudafrica      | 2018 | 33                 | 3,38                | 3,17   | 3,19           | 3,51                      | 3,19                 | 3,41               | 3,74       |
| Costa d'Avorio | 2018 | 50                 | 3,08                | 2,78   | 2,89           | 3,21                      | 3,23                 | 3,14               | 3,23       |
| Rwanda         | 2018 | 57                 | 2,97                | 2,67   | 2,76           | 3,39                      | 2,85                 | 2,75               | 3,35       |
| Egitto         | 2018 | 67                 | 2,82                | 2,60   | 2,82           | 2,79                      | 2,82                 | 2,72               | 3,19       |

# BEYOND TRANSPORTS



Creation of **supply chains** at the regional level  
Africa produce at most intermediate goods that are sent to other areas of the world.

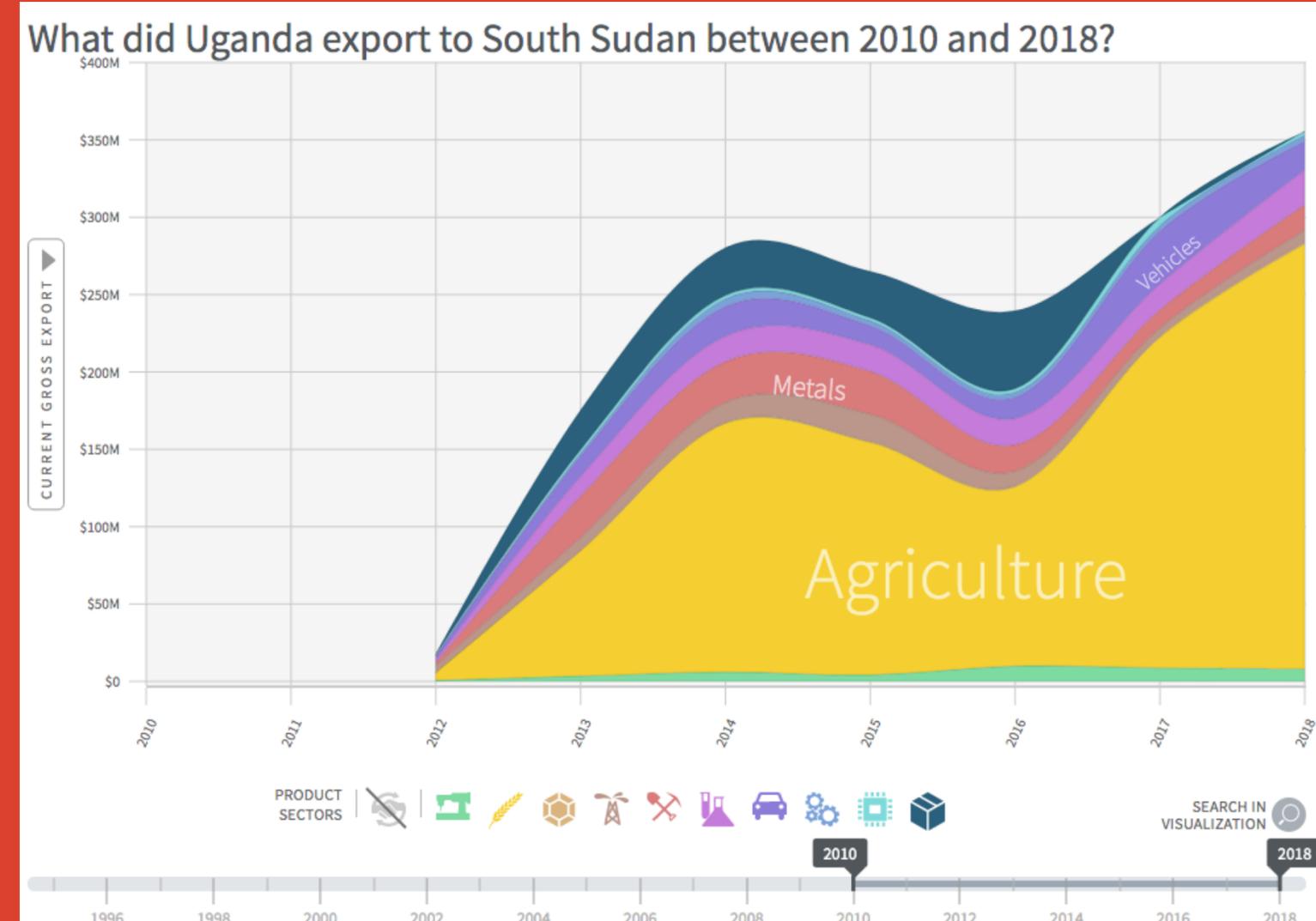
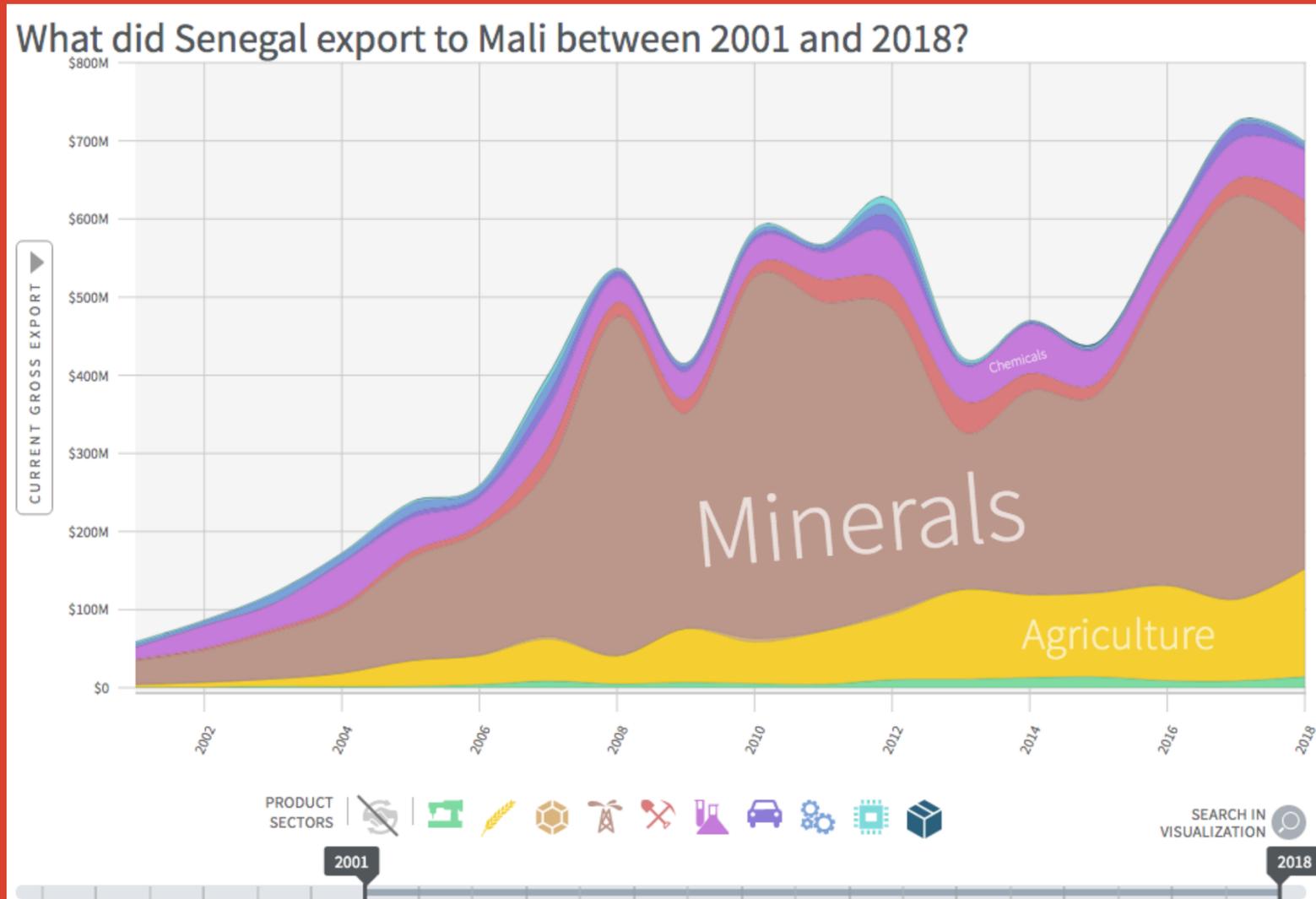


Abolition of **non-tariff barriers**, the real obstacle to African internal trade.  
**"Only by removing this item would increase intra-African trade by 50%**

# 2 EXAMPLES WHEN THIS HAPPENS

When you work on **value chains** and **non-tariff barriers**, these are the results, look how the trends changed

**Uganda-South Sudan**  
**Senegal-Mali**



# LOOKING AHEAD



AFRICAN  
TRADE  
OBSERVATORY

## LOGISTICA SMART IN AFRICA



**Move Africa, così si misura la performance**  
L'Agenzia di sviluppo dell'Unione Africana (Auda-Nepad) ha elaborato MoveAfrica-Traffic Light System (Tls), uno strumento che monitora e misura le performance commerciali lungo i corridoi di trasporto.

Il Tls ha finora trovato punti di controllo in quattro frontiere: il Beitbridge in Sudafrica e Zimbabwe; il Chirundu, in Zimbabwe; il Beitbridge, tra Botswana e Zimbabwe; Kasumbira, in Repubblica Democratica del Congo

# 21,9%

— La quota che il commercio intra-africano dovrebbe raggiungere entro il 2022

# 57

— Le migliaia di chilometri di strade in cui si articolerà la Trans-Africa Highway network

## Big data

### I 5 modi in cui l'Internet delle cose (Internet of Things, IoT) cambierà la logistica

- 1 IoT in magazzino:** monitoraggio in tempo reale del livello delle scorte, possibilità di sapere esattamente cosa c'è a portata di mano e dove si trova nel magazzino
- 2 Camion abilitati allo IoT:** i sensori collegati segnalano tutto, dalle condizioni all'interno del container ai livelli di carburante, a quanto tempo è passato da quando i pneumatici sono stati sostituiti
- 3 Costi carburante:** la combinazione di dispositivi IoT abilitati per Gps e Rfid (Radio-frequency identification) consente di monitorare il consumo di carburante e di scegliere per esempio di reindirizzare una spedizione per evitare aree con costi più elevati
- 4 Data integration:** uno dei principali impatti che i dispositivi IoT forniranno è una maggiore integrazione dei dati. La capacità di conoscere lo stato esatto di una spedizione è fondamentale
- 5 Quantità di dati:** la quantità di dati che possono essere raccolti, analizzati e segnalati dai dispositivi IoT è vasta, deve ancora essere esplorata e supererà ogni immaginazione

# AFCFTA FOR AFRICA

"I honestly believe that the **AfCFTA is a must for Africa** if the continent wants to grow. What must grow on a continental level is the conviction to **stop fighting to grab small pieces of cake**, but to start running all together to share a bigger cake. The real point in the trade disputes **between African states is that not everyone has to produce the same things**. If we will be able to compete and invest on the entire African market, we will not relegate Africa to the mere role of consumer (...) **this path has already begun**, just look at the investments of African companies in Africa. If you look at the trend of the last 10 years, it turns out that African investments in Africa in 2003 amounted to 4 billion dollars, in in 2017 to 12.4 billion dollars" (Africa e Affari's interview with President of AfDB, **Akinwumi Adesina**)

# AFCFTA FOR AFRICA



**ITALY (WITH ITS SMES ADDED VALUE  
INDUSTRIAL SYSTEM) CAN BE A  
GOOD PARTNER IN THIS NEW  
AFRICAN PATH**

# THANKS

