



ORTA ANADOLU
İHRACATÇI BİRLİKLERİ
GENEL SEKRETERLİĞİ

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Ankara, 16/12/2024

Sayın Üyemiz,

Türkiye İhracatçılar Meclisi (TİM)'den alınan bir yazıda, Ticaret Bakanlığında alınan bir yazıya atfen, Birleşmiş Milletler Afrika Ekonomik Komisyonu (UNECA) tarafından Etiyopya'nın başkenti Addis Ababa'daki Birleşmiş Milletler Konferans Merkezi'nde **17 Şubat 2025 tarihinde "Potansiyelden Refaha: Afrika'nın Bölgesel Değer Zincirlerini Etkinleştirme"** temasıyla 8. Afrika İş Forumu düzenlenecek olup; tarım parkları, hayvancılık ve ilaç değer zincirlerinde faaliyette bulunan veya Afrika değer zincirlerine yatırım yapma konusuna ilgi gösteren Türk iş insanlarının söz konusu etkinliğe katılım sağlamalarının mümkün olduğu bildirilmektedir.

Buna ilaveten, Afrika'nın Ekonomik Kalkınması için Arap Bankası, Afrika Finans Kurumu, Afrika Exim Bankası, Doğu ve Güney Afrika Ortak Pazarı Ticaret ve Kalkınma Bankası gibi finansör kuruluşların da anılan etkinliğe katılım sağlaması ve etkinlik kapsamında Afrika'ya potansiyel yatırımcıları çekmek üzere fırsatlar ve zorluklar hakkında panellerin düzenlenmesi öngörülmektedir.

Söz konusu etkinliğe ilişkin Kavram Kağıdı yazı ekinde yer almakta olup, etkinliğe katılım sağlayacak olan firmaların aşağıda irtibat bilgileri bulunan Addis Ababa Ticaret Müşavirliğimizle irtibata geçmesi gerektiği belirtilmektedir.

Bilgilerine sunulur.

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firms are more active in contributing to products that undergo further processing in other regions than in importing intermediate inputs to which value can be added within Africa. This mismatch between the continent's resources and its value addition suggests that there is a significant opening for investment in sectors that enhance local processing and industrialization.

It is precisely this low level of participation that points to untapped opportunities on the continent. African regional value chains therefore offer a strategic entry point, through which investors can participate in the continent's accelerated industrialization and secure a foothold in a rapidly expanding market. Investors can also mitigate supply and market risks, while forging partnerships with African States, in order to tap into natural resource endowments and emerging sectors.

The landscape has never been more favourable. The Agreement Establishing the African Continental Free Trade Area is removing obstacles to the connection of links in the value chain and is promoting value accumulation within Africa. By eliminating tariffs and non-tariff barriers, the Agreement will address the current imbalance, whereby, on average, tariffs of 10.6 per cent are levied on finished goods and tariffs of 5.6 per cent are levied on intermediate goods within Africa, whereas the corresponding tariffs on imports from the rest of the world are 9.4 per cent and 5.5 per cent, respectively.³

It is projected that, by 2050, the population of Africa will reach 2.5 billion and, with a median age of 20 years, be the most youthful of all the continents. That young population represents a valuable demographic dividend, which can be harnessed in the form of labour for industrial development. Moreover, in combination with the \$60 billion per year spent on food imports into Africa,⁴ the continent's large population represents a sizable potential domestic market for agricultural products produced by regional value chains. The operationalization of the Agreement Establishing the African Continental Free Trade Area will boost intra-African trade by eliminating barriers to trade and investment, while improving access to larger global markets.

Another asset is the strong readiness of African enterprises to move away from extractivism and engage more deeply in diversified and value-added economic activities. This is evident in the increasingly diverse composition of intra-African trade, of which manufactured goods and

² Stephen Karingi and others: "Implementing the AfCFTA Agreement and implications for Africa's regional value chains": paper presented at the Twenty-Seventh Annual Conference on Global Economic Analysis: Fort Collins: Colorado: United States of America: ⁵ June 2024.

³ Ibid.

⁴ Kingsley Ighobor 'Africa Renewal': "Transforming Africa's Food Systems: the challenges and opportunities —

a conversation with Ibrahim Mayaki, African Union special envoy", United Nations: ²⁹ June 2023.

⁵ ECA: The AfCFTA – What You Need to Know: Frequently Asked Questions & Answers (Addis Ababa: 2023).

machinery together account for one quarter of total value. These internal trade dynamics contrast sharply with the continent’s external trade dynamics.⁵

It has never been a challenge to identify viable potential regional value chains in Africa, of which the regional economic communities have proposed a significant number. For instance, in the road map and strategy for industrialization in the period 2015–2063 of the Southern African Development Community, six value chains are identified for development: agroprocessing, minerals and mining, pharmaceuticals, other consumer goods, capital goods and services. In 2014, the Economic Community of West African States and the West African Economic and Monetary Union adopted the West Africa Competitiveness Programme, a six-year plan to support the development of value chains for seven product categories: cassava; textiles and garments; mangoes; information and communications technology; onions; pineapples; and hides, skin and leather. Following the development of the strategy on the cotton, textiles and apparel industry for the period 2020–2030 of the East African Community, the industry has emerged as a priority sector within the national development plans of the Community’s partner States, which have a common target of building a globally competitive industry. The identification of those regional value chains has not, however, translated into commensurate flows of investment.

III. Areas of focus

Taking into consideration the rich natural resource endowments of Africa and the areas in which greater attention from investors and more focused national and regional policies are needed, ECA has identified three especially significant regional value chains. They will be highlighted at the Africa Business Forum.

A. Agro-industrial value chains

The Agreement Establishing the African Continental Free Trade Area is projected to bring about a 49.1 per cent increase in intra-African trade in the agrifood sector by 2045, compared with a 34.2 per cent increase in overall trade.⁶ From those figures, it is clear that agricultural value chains in Africa have significant potential. Not only is the agrifood sector profitable, but it also has great potential for fostering sustainable development, given its significant spillover effects on the livelihoods of women, who make up 70 per cent of the continent’s agricultural labour force, and of smallholder farmers, who are responsible for 80 per cent of African food production.⁷

⁵ ECA: The AfCFTA – What You Need to Know: Frequently Asked Questions & Answers (Addis Ababa, 2023).

⁶ Ibid.

⁷ Chido Mnyati and Sandy Sighe: How Africa’s new free trade area will turbocharge the continent’s agriculture industry, World Economic Forum, 14 March 2023.

support those companies. In addition, during the discussion, backward and forward linkages will be highlighted, in particular in the leather industry. In relation to the meat and leather value chains more broadly, participants will also discuss critical enablers, such as financing, standards, branding and support services.

C. Pharmaceutical value chains

Since the mid-2010s, African States and institutions have been intensifying their efforts to strengthen the continent's healthcare systems, in particular its pharmaceutical manufacturing capacity, and thereby contribute to improved public health outcomes and to socioeconomic development. The disruptions to African economies caused by the coronavirus disease (COVID-19) pandemic have demonstrated that the health sector plays a critical role in the continent's economic development. The importance of the health sector to African economies, however, extends beyond the adverse effects of COVID-19. Since good health is a cause, not just a consequence, of economic growth, public and private investment in the continent's health sector is an important strategy for the construction of resilient African economies. The Pharmaceutical Manufacturing Plan for Africa, under the Africa Health Strategy, 2016–2030 and the Action Plan for Accelerated Industrial Development in Africa, both of the African Union, is the framework within which this agenda is being promoted on the continent.

The health sector is an important source of employment in Africa. Increasing the sector's capacity, not only to provide essential services, but also to meet the demand for high-quality, specialized services can be a significant source of revenue for African economies. Such capacity increases can also foster the development of higher value-added industries on the continent. In most countries of sub-Saharan Africa, 70 per cent to 90 per cent of the pharmaceutical products that are used are imported. With a population of about 1.5 billion, however, the continent has only 375 drug manufacturers, most of them located in North Africa.¹⁰ The high demand for imported pharmaceuticals is due to the heavy disease burden on Africa, where both communicable and non-communicable diseases are prevalent, and to the rapid growth and changing lifestyles of its population. Africa has great potential for the manufacture of pharmaceuticals, given the diversity of its plant species and the unique traditional understanding among some population groups of the medicinal value of numerous native plants. This provides a fertile environment for research and development and for the establishment of auxiliary systems and services, such as patenting, standardization and quality control.

¹⁰ Michael Conway and others 'Should sub-Saharan Africa make its own drugs?', McKinsey, 10 January 2019, <https://www.mckinsey.com/industries/healthcare/our-insights/should-sub-saharan-africa-make-its-own-drugs>

