



Ex-post evaluation of the EU-SADC Economic Partnership Agreement

Interim Report: Volume 2 - Appendices

11 December 2023

Prepared by BKP Economic Advisors

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APPENDIX A: DETAILED ANALYSES OF THE IMPLEMENTATION OF THE EPA

Appendix A1: Analysis related to tariff preferences

Table 1: Preference utilisation by SADC EPA States, 2016-2022 (€ millions)

	2016	2017	2018	2019	2020	2021	2022
Botswana							
Total imports	2,063	1,334	1,247	912	979	1,078	1,418
Duty free imports	2,062	1,333	1,246	912	979	1,076	1,417
EPA eligible	16	8	13	21	4	3	4
EPA used	16	8	13	21	3	1	4
Share duty free	100.0%	99.9%	99.9%	100.0%	99.9%	99.8%	100.0%
EPA utilisation	98.7%	96.1%	97.4%	99.0%	90.3%	42.9%	87.4%
Eswatini							
Total imports	89	75	47	113	50	71	64
Duty free imports	74	40	36	92	39	70	61
GSP eligible	12	8	12	0	0	0	0
GSP used	0	0	0	0	0	0	0
EPA eligible	86	65	44	110	48	68	61
EPA used	70	30	33	88	36	66	57
Share duty free	82.9%	53.5%	77.0%	80.8%	77.4%	97.6%	94.9%
GSP utilisation	0.0%	0.0%	0.2%	..	..	..	..
EPA utilisation	82.0%	46.0%	75.9%	80.3%	76.1%	97.5%	94.6%
Lesotho							
Total imports	207	270	351	302	271	220	298
Duty free imports	207	269	351	301	271	219	297
GSP eligible	3	5	5	5	8	5	4
GSP used	2	1	1	1	3	4	3
EPA eligible	0	5	5	5	8	5	4
EPA used	0	3	4	4	5	0	0
Share duty free	99.9%	99.8%	99.9%	99.9%	99.8%	99.7%	99.8%
GSP utilisation	90.1%	19.8%	24.0%	12.7%	32.7%	85.6%	87.8%
EPA utilisation	0.0%	71.5%	73.2%	81.2%	59.4%	0.1%	0.1%
Mozambique							
Total imports	1,228	1,565	1,745	1,662	1,249	1,245	2,851
Duty free imports	1,197	1,508	1,706	1,613	1,234	1,219	2,710
GSP eligible	901	1,028	1,111	1,178	1,004	902	1,965
GSP used	872	1,005	1,090	1,103	946	838	1,818
EPA eligible	0	0	1,111	1,178	1,004	902	1,965
EPA used	0	0	11	28	45	39	44
Share duty free	97.4%	96.4%	97.8%	97.1%	98.8%	97.9%	95.1%
GSP utilisation	96.7%	97.8%	98.1%	93.6%	94.2%	92.9%	92.5%
EPA utilisation	..	..	1.0%	2.4%	4.4%	4.3%	2.2%
Namibia							
Total imports	1,050	1,265	1,255	1,132	1,105	1,361	1,328
Duty free imports	1,038	1,251	1,248	1,122	1,102	1,326	1,298
EPA eligible	510	480	524	500	359	388	438
EPA used	498	472	519	492	357	371	408
Share duty free	98.8%	99.0%	99.4%	99.1%	99.7%	97.4%	97.7%
EPA utilisation	97.7%	98.3%	99.1%	98.4%	99.3%	95.5%	93.1%
South Africa							
Total imports	13,922	15,557	16,862	18,844	16,326	21,904	28,051
Duty free imports	11,191	12,463	14,415	16,507	14,624	19,996	25,290
EPA eligible	7,712	8,465	9,693	10,896	8,435	9,019	10,336
EPA used	5,948	6,691	8,103	9,343	7,550	8,286	8,890
Share duty free	80.4%	80.1%	85.5%	87.6%	89.6%	91.3%	90.2%
EPA utilisation	77.1%	79.0%	83.6%	85.7%	89.5%	91.9%	86.0%

Note: The share of duty free imports is calculated by dividing the value of duty free imports by the value of total imports. The GSP/EPA preference utilisation rate is calculated by dividing the value of imports using GSP or EPA preferences by the value of imports eligible to use GSP or EPA preferences, according to the source database.

Source: Own calculations based on Eurostat COMEXT data (DS-059281).

Appendix A2: Export duties in Namibia

Table 2: Products covered by export duties under the 2016 Export Levy Act and amendments

Main Product	Commodity code	Specific Product	After 2020 amendments		After 2019 amendments		2016
			Export Levy rate EU	Export Levy Rate General	Export Levy rate EU	Export Levy Rate General	Export Levy Rate General (incl. EU)
Schedule 1 (changed in 2019)							
Lithium	283691	Lithium Carbonates	Free ¹	2.00%	Free	2.00%	not listed
Diamond	710210	Pure unsorted rough diamonds	2.00%	2.00%	2.00%	2.00%	2.00%
	710221	Sorted by size	1.50%	1.50%	1.50%	1.50%	1.50%
	710231	Sorted & graded	1.00%	1.00%	1.00%	1.00%	1.00%
	710239	Cut & polished	0.50%	0.50%	0.50%	0.50%	0.50%
		Products of jewellery etc.	0.00%	0.00%	0.00%	0.00%	0.00%
Zinc	260800	Crushed Ore	2.00%	2.00%	2.00%	2.00%	2.00%
		Zinc Concentrate	1.00%	1.00%	1.00%	1.00%	1.00%
	2620.11	Zinc sheets	0.50%	0.50%	0.50%	0.50%	0.50%
	2620.11	Zinc Ingots	0.25%	0.25%	0.25%	0.25%	0.25%
	7206 - 7216	Steel Products	0.00%	0.00%	0.00%	0.00%	0.00%
Lead, other metals	260700	Lead Concentrate	1.00%	1.00%	1.00%	1.00%	1.00%
Uranium	261210	Uranium oxide/yellow	0.25%	0.25%	0.25%	0.25%	0.25%
Copper	260300	CU Concentrate	1.00%	1.00%	1.00%	1.00%	1.00%
Gold	710813	Gold bullion	1.00%	1.00%	1.00%	1.00%	1.00%
Manganese	260200	Manganese Concentrate	1.00%	1.00%	1.00%	1.00%	1.00%
Fluorspar	2529.21	Acid Grade Fluorspar	0.25%	0.25%	0.25%	0.25%	0.25%
	2529.22	Acid Grade Fluorspar	0.25%	0.25%	0.25%	0.25%	0.25%
Other Metals, Precious and Semi-precious stones	711100	Pure metal	0.25%	0.25%	0.25%	0.25%	0.25%
	710310 - 710399	Stone	0.25%	0.25%	0.25%	0.25%	0.25%
Dimension stones	251512	Stone blocks	2.00%	15.00%	2.00%	15.00%	2.00%
Marbles	251512	Stone blocks	2.00%	15.00%	2.00%	15.00%	2.00%
Tantalum		Unwrought tantalum, including bars and rods obtained simply by sintering; powders	Free	2.00%	Free	2.00%	not listed
	8103.20 8 - 271121-271129.90						
Gas	271111	Unrefined gas of all types	1.50%	1.50%	1.50%	1.50%	1.50%
		Refined gas of all types	0.00%	0.00%	0.00%	0.00%	0.00%
Crude Oil	2707 all	Unrefined crude oil of all types	1.50%	1.50%	1.50%	1.50%	1.50%
	270900	Refined oil of all types	0.00%	0.00%	0.00%	0.00%	0.00%
Schedule 2 (changed in 2019)							
Ornamental fish -	0301.11	Fresh Water	1.50%	1.50%	1.50%	1.50%	1.50%
	0301.91	Trout	1.50%	1.50%	1.50%	1.50%	1.50%
Other live fish: 0301.9	0301.92	Eels (Anguilla spp.)	1.50%	1.50%	1.50%	1.50%	1.50%
	0301.93	Carp	1.50%	1.50%	1.50%	1.50%	1.50%
	0301.94	Atlantic and Pacific Bluefin tunas	1.50%	1.50%	1.50%	1.50%	1.50%
Fish, fresh or chilled: 0302.1	0301.95	Southern Bluefin tunas	1.50%	1.50%	1.50%	1.50%	1.50%
	0302.11	Trout	1.50%	1.50%	1.50%	1.50%	1.50%
	0302.13	Pacific salmon	1.50%	1.50%	1.50%	1.50%	1.50%
Flat fish: 0302.2	0302.19	Atlantic salmon	1.50%	1.50%	1.50%	1.50%	1.50%
	0302.21	Halibut	1.50%	1.50%	1.50%	1.50%	1.50%
Tunas: 0302.3	0302.22	Plaice (Pleuronectes platessa)	1.50%	1.50%	1.50%	1.50%	1.50%
	0302.23	Sole (Solea spp.)	1.50%	1.50%	1.50%	1.50%	1.50%
	0302.24	Turbots (Psetta maxima)	1.50%	1.50%	1.50%	1.50%	1.50%
	0302.31	Albacore or long finned tunas	1.50%	1.50%	1.50%	1.50%	1.50%

¹ In early June 2023, the Government announced a ban on exports of "certain critical minerals such unprocessed crushed lithium ore, cobalt, manganese, graphite and rare earth minerals" (Reuters 2023). The details of this export prohibition could not yet be obtained by the evaluation team, but media coverage indicates that the ban is being enforced (Nyaungwa 2023).

Main Product	Commodity code	Specific Product	After 2020 amendments		After 2019 amendments		2016	
			Export Levy rate EU	Export Levy Rate General	Export Levy rate EU	Export Levy Rate General	Export Levy Rate General (incl. EU)	
	030232	Yellowfin tunas	1.50%	1.50%	1.50%	1.50%	1.50%	
	030233	Skipjack or stripe-bellied bonito	1.50%	1.50%	1.50%	1.50%	1.50%	
	030234	Bigeye tunas (Thunnus obesus)	1.50%	1.50%	1.50%	1.50%	1.50%	
	030235	Atlantic and Pacific bluefin tunas	1.50%	1.50%	1.50%	1.50%	1.50%	
	030236	Southern bluefin tuna	1.50%	1.50%	1.50%	1.50%	1.50%	
	Herrings: 0302.4	030241	Herrings	1.50%	1.50%	1.50%	1.50%	1.50%
030242		Anchovies	1.50%	1.50%	1.50%	1.50%	1.50%	
030243		Sardines	1.50%	1.50%	1.50%	1.50%	1.50%	
030244		Mackerel	1.50%	1.50%	1.50%	1.50%	1.50%	
030245		Jack and horse mackerel	1.50%	1.50%	1.50%	1.50%	1.50%	
030246		Cobia (Rachycentron canadum)	1.50%	1.50%	1.50%	1.50%	1.50%	
Fish of the families: 0302.5	030247	Swordfish (Xiphias gladius)	1.50%	1.50%	1.50%	1.50%	1.50%	
	030251	Cod	1.50%	1.50%	1.50%	1.50%	1.50%	
	030252	Haddock	1.50%	1.50%	1.50%	1.50%	1.50%	
	030253	Coalfish (Pollachius virens)	1.50%	1.50%	1.50%	1.50%	1.50%	
	030254	Hake	1.50%	1.50%	1.50%	1.50%	1.50%	
	030255	Alaska Pollack	1.50%	1.50%	1.50%	1.50%	1.50%	
0302.7:	030256	Blue whittings	1.50%	1.50%	1.50%	1.50%	1.50%	
	030271	Tilapias	1.50%	1.50%	1.50%	1.50%	1.50%	
	030272	Catfish	1.50%	1.50%	1.50%	1.50%	1.50%	
	030273	Carp	1.50%	1.50%	1.50%	1.50%	1.50%	
Other fish: 0302.8	030274	Eels	1.50%	1.50%	1.50%	1.50%	1.50%	
	030279	other	1.50%	1.50%	1.50%	1.50%	1.50%	
	030281	Dogfish and other sharks	1.50%	1.50%	1.50%	1.50%	1.50%	
	030282	Rays and skates (Rajidae)	1.50%	1.50%	1.50%	1.50%	1.50%	
	030283	Toothfish (Dissostichus spp.)	1.50%	1.50%	1.50%	1.50%	1.50%	
	030284	Seabass (Dicentrarchus spp.)	1.50%	1.50%	1.50%	1.50%	1.50%	
0303 Fish, frozen	030285	Seabream (Sparidae)	1.50%	1.50%	1.50%	1.50%	1.50%	
	030289	Other: KingKlip	Free	1.50%	Free	1.50%	1.50%	
	030311	Salmonidae: Sockeye salmon (red salmon)	1.50%	1.50%	1.50%	1.50%	1.50%	
	030312	Other Pacific salmon	1.50%	1.50%	1.50%	1.50%	1.50%	
	030313	Atlantic salmon	1.50%	1.50%	1.50%	1.50%	1.50%	
	030314	Trout	1.50%	1.50%	1.50%	1.50%	1.50%	
	030323	Tilapias	1.50%	1.50%	1.50%	1.50%	1.50%	
	0303.24	Catfish	1.50%	1.50%	1.50%	1.50%	1.50%	
	0303.25	Carp	1.50%	1.50%	1.50%	1.50%	1.50%	
	0303.26	Eels	1.50%	1.50%	1.50%	1.50%	1.50%	
	0303.3 Flat fish	0303.31	Halibut	1.50%	1.50%	1.50%	1.50%	1.50%
		0303.32	Plaice (Pleuronectes platessa)	1.50%	1.50%	1.50%	1.50%	1.50%
		0303.33	Sole (Solea spp.)	1.50%	1.50%	1.50%	1.50%	1.50%
		0303.34	Turbots (Psetta maxima)	1.50%	1.50%	1.50%	1.50%	1.50%
0303.4 Tunas (OF THE GENUS THUNNUS)	0303.39 8	Other						
	0303.41	Southern blue fin tuna	1.50%	1.50%	1.50%	1.50%	1.50%	
	0303.42	Yellow fin tunas	1.50%	1.50%	1.50%	1.50%	1.50%	
	0303.43	Skipjack or stripe-bellied bonito	1.50%	1.50%	1.50%	1.50%	1.50%	
	0303.44	Bigeye tunas	1.50%	1.50%	1.50%	1.50%	1.50%	
	0303.45	Atlantic and Pacific blue fin tunas	1.50%	1.50%	1.50%	1.50%	1.50%	
0303.5	0303.46	Albacore or long finned tunas	1.50%	1.50%	1.50%	1.50%	1.50%	
	0303.51	Herrings	1.50%	1.50%	1.50%	1.50%	1.50%	
	0303.53	Sardines (Sardina pilchardus, Sardinops spp.), sardinella (Sardinella spp.), brisling or sprats (Sprattus sprattus)	1.50%	1.50%	1.50%	1.50%	1.50%	
	030354	Mackerel	1.50%	1.50%	1.50%	1.50%	1.50%	
	030355	Jack and horse mackerel	1.50%	1.50%	1.50%	1.50%	1.50%	
	030356	Cobia	1.50%	1.50%	1.50%	1.50%	1.50%	
	030357	Swordfish	1.50%	1.50%	1.50%	1.50%	1.50%	
	0303.6	030363	Cod	1.50%	1.50%	1.50%	1.50%	1.50%
		030364	Haddock	1.50%	1.50%	1.50%	1.50%	1.50%
		030365	Coalfish	1.50%	1.50%	1.50%	1.50%	1.50%
030366		Hake	1.50%	1.50%	1.50%	1.50%	1.50%	
030367		Alaska Pollack	1.50%	1.50%	1.50%	1.50%	1.50%	
030368		Blue whittings	1.50%	1.50%	1.50%	1.50%	1.50%	
0303.8	030381	Dogfish and other sharks	1.50%	1.50%	1.50%	1.50%	1.50%	
	030382	Rays and skates	1.50%	1.50%	1.50%	1.50%	1.50%	
	030383	Toothfish	1.50%	1.50%	1.50%	1.50%	1.50%	
	030384	Seabass	1.50%	1.50%	1.50%	1.50%	1.50%	
	030389	Other: KingKlip	Free	1.50%	Free	1.50%	1.50%	

Main Product	Commodity code	Specific Product	After 2020 amendments		After 2019 amendments		2016
			Export Levy rate EU	Export Levy Rate General	Export Levy rate EU	Export Levy Rate General	Export Levy Rate General (incl. EU)
Seals		Seal fur	not listed	not listed	not listed	not listed	1.00%
Schedule 3 (changed in 2019 and 2020)							
Mopane roots	12119090	Mopane Roots, sorted	1.50%	1.50%	1.50%	1.50%	1.50%
	12119090	Mopane Roots, unsorted	2.00%	2.00%	2.00%	2.00%	2.00%
Devils claw		Sandblasted mopane roots	0.00%	0.00%	0.00%	0.00%	0.00%
	12119080	Root tubers	1.50%	1.50%	1.50%	1.50%	1.50%
	12119090	Devil's claw, sliced and dried	1.00%	1.00%	1.00%	1.00%	1.00%
	13021990	Chemicals extraction of Devil's claw	0.25%	0.25%	0.25%	0.25%	1.00%
Hoodia		Pharmaceutical and other products of Devil's Claw	0.00%	0.00%	0.00%	0.00%	0.00%
	12119090	Hoodia plant log	2.00%	2.00%	2.00%	2.00%	2.00%
	121190	Hoodia, sliced and dried	1.00%	1.00%	1.00%	1.00%	1.00%
	13021990	Chemicals extraction of hoodia	0.25%	0.25%	0.25%	0.25%	0.25%
Wood		Pharmaceutical and other products of hoodia	0.00%	0.00%	0.00%	0.00%	0.00%
	4401.11	Fuel wood, in logs, in billets... or in similar forms: Coniferous wood in chips or particles	Free	N\$2/kg	Free	N\$2/kg	not listed
	440112	Fuel wood, in logs, in billets... or in similar forms: Non-coniferous wood in chips or particles	Free	N\$2/kg	Free	N\$2/kg	not listed
	440121	Wood in chips or particles: Coniferous	Free	N\$2/kg	Free	N\$2/kg	not listed
	440122	Wood in chips or particles: Non-coniferous	Free	N\$2/kg	Free	N\$2/kg	not listed
	440131	Sawdust, wood waste and scrap, agglomerated, in logs, briquettes, pellets or similar forms: wood pellets	Free	N\$2/kg	Free	N\$2/kg	not listed
	440139	Sawdust, wood waste and scrap, agglomerated, in logs, briquettes, pellets or similar forms: Other	Free	N\$2/kg	Free	N\$2/kg	not listed
	440140	Sawdust, wood waste and scrap, Not agglomerated	Free	N\$2/kg	Free	N\$2/kg	not listed
	440311	Wood in the rough..., treated with paint, stains, creosote, etc Coniferous	Free	N\$2/kg	Free	15.00%	not listed
	440312	Wood in the rough..., treated with paint, stains, creosote, etc Non-Coniferous	Free	N\$2/kg	Free	15.00%	not listed
	440321	Other coniferous wood in the rough of pine of which any cross-sectional dimension is 15cm or more	Free	N\$2/kg	Free	15.00%	not listed
	440322	Other coniferous wood of pine	Free	N\$2/kg	Free	15.00%	not listed
	440323	Other coniferous wood of fir and spruce of which any cross-sectional dimension is 15cm or more	Free	N\$2/kg	Free	15.00%	not listed
	440324	Other coniferous wood of fir and spruce, other	Free	N\$2/kg	Free	15.00%	not listed
	440325	Other of which any cross-sectional dimension is 15cm or more	Free	N\$2/kg	Free	15.00%	not listed
	440326	Other	Free	N\$2/kg	Free	15.00%	not listed
	44034	Other, of tropical wood:	Free	N\$2/kg	Free	15.00%	not listed
	440341	Dark red meranti, light red meranti and meranti bakau	Free	N\$2/kg	Free	15.00%	not listed
	440349	Other: Including Burkia Africana, sering (Omutundungu) Baikiaea plurijuga (Zambezi Teak) Combretum imberbe lead wood (Omukuku) Acacia Senegalensis Acacia Erioloba Camel thorn (Omwoonde) colophospermum mopane wood (Mopane tree, Omusati) Pterocarpus angolensis, Kiaat, Muguva Terminalia sericea (Silver Cluster-leaf, Geelhout) Berchemia Zeyheri (Red Ivory) guibourtia coleosperma Rosewood (Musivi) terminalia prunioides (Omuhama)	Free	N\$2/kg	Free	15.00%	not listed
	440391	Oak wood (Quercus spp.) in the rough,	Free	N\$2/kg	Free	15.00%	not listed

Main Product	Commodity code	Specific Product	After 2020 amendments		After 2019 amendments		2016
			Export Levy rate EU	Export Levy Rate General	Export Levy rate EU	Export Levy Rate General	Export Levy Rate General (incl. EU)
	440393	Of beech wood (Fagus spp.) in the rough of which any cross-sectional dimension is 15cm or more	Free	N\$2/kg	Free	15.00%	not listed
	440394	Of beech wood (Fagus spp.)	Free	N\$2/kg	Free	15.00%	not listed
	440395	Of birch (Betula spp) of which any cross-sectional dimension is 15cm or more	Free	N\$2/kg	Free	15.00%	not listed
	440396	Of birch (Betula spp)	Free	N\$2/kg	Free	15.00%	not listed
	440397	Of poplar and aspen (Populus spp.)	Free	N\$2/kg	Free	15.00%	not listed
	440398	Of eucalyptus	Free	N\$2/kg	Free	15.00%	not listed
	440399	Other:	Free	N\$2/kg	Free	15.00%	not listed
	44039910	Of yellowwood (Podocarpus Falcatus, Podocarpus Henkelli, Podocarpus Latfolius)	Free	N\$2/kg	Free	15.00%	not listed
	44039920	Of Black Stinkwood (Ocotea Bullata)	Free	N\$2/kg	Free	15.00%	not listed
	44039930	Of Blackwood (Acasia Melanoxyton)	Free	N\$2/kg	Free	15.00%	not listed
	44039990	Other: Including Burkia Africana, sering (Omutundungu) Baikiaea plurijuga (Zambezi Teak) Combretum imberbe lead wood (Omukuku) Acacia Senegalensis Acacia rioloba Camel thorn (Omwoonde) colophospermum mopane wood (Mopane tree, Omusati) Pterocarpus angolensis, Kiaat, Muguva Terminalia sericea (Silver Cluster-leaf, Geelhout) Berchemia Zeyheri (Red Ivory)	Free	N\$2/kg	Free	15.00%	not listed
Schedule 4 (added in 2019)							
	41.01	Bovine hides: Raw hides and skins of bovine (including buffalo) or equine animals (fresh, or salted, dried, limed or otherwise preserved, but not tanned, parchment- dressed or further prepared), whether or not dehaired or split:	60.00%	60.00%	60.00%	60.00%	not listed
	4102	Goat and sheep skins: Sheep skins in wet or dry form, whether salted or not, but excluding skins in pickled, wet blue, crust, dyed crust or finished leather form. Raw skins of sheep or lambs (fresh, or salted, dried, limed, pickled or otherwise preserved, but not tanned, parchment-dressed or further prepared), whether or not with wool on or	60.00%	60.00%	60.00%	60.00%	not listed
	4101	Pickled skins Pickled skins of Bovine Animals	15.00%	15.00%	15.00%	15.00%	not listed
	4102.21.10	Pickled skins Pickled skins of Sheep or Lamb	15.00%	15.00%	15.00%	15.00%	not listed
	4102.21.90	Pickled skins Pickled skins, other	15.00%	15.00%	15.00%	15.00%	not listed
	4103.20 00	Pickled skins Pickled skins of Reptiles	15.00%	15.00%	15.00%	15.00%	not listed

Source: Own preparation based on Export Levy Act and amendments, obtained through <https://commons.laws.africa/%2Fakn/na/act/2016/2>

APPENDIX B: DETAILED ANALYSES RELATED TO THE ECONOMIC IMPACT OF THE EPA

Appendix B1: Comparative analysis of trade between the Parties

1. EVOLUTION OF TOTAL BILATERAL TRADE IN GOODS BETWEEN THE EU AND SADC EPA STATES OVER TIME

Using Eurostat COMEXT data, the following sub-sections analyse the evolution of merchandise trade flows between the EU and the six partners (individually and jointly) over time. The analysis focuses on identifying changes in trend before and after the start of application of the EPA.

As a robustness check, we also compare COMEXT data with SADC EPA State official statistics to check if there are any major discrepancies. Where this is the case, the need for further investigations into the reasons is indicated; these investigations will mainly consist in targeted consultations with customs authorities and traders.

1.1. EU-SADC EPA State trade

Trade between the EU27 and the six SADC EPA partners had stagnated between 2011 and 2016, at about € 41 billion, but since then increased substantially – with a drop only in 2020, driven by COVID-19 – to €63 billion in 2022. Much of this increase came from EU imports from the partner countries (Figure 1): these started to grow already since 2013, from €15.3 billion then to €35.2 billion in 2022. Conversely, EU exports to the partner countries were much less dynamic, hovering between €22 and €24 billion from 2011 to 2016, and then increasing slowly, to €24.4 billion in 2019. 2020 then saw a major contraction to €19.1 billion, followed by solid recovery in 2021 and 2022, reaching €28.3 billion. In line with the higher dynamics of imports, the EU’s bilateral trade balance with the SADC EPA States decreased from a surplus of €8.2 billion in 2012 to €3.1 billion in 2016 – already before the EPA – and then further in the following years, turning into a deficit in 2020 for the first time. This deficit rapidly widened in 2021 and 2022, reaching €6.9 billion.

Figure 1: EU27-SADC EPA State bilateral trade, 2011-2022 (€ billion)

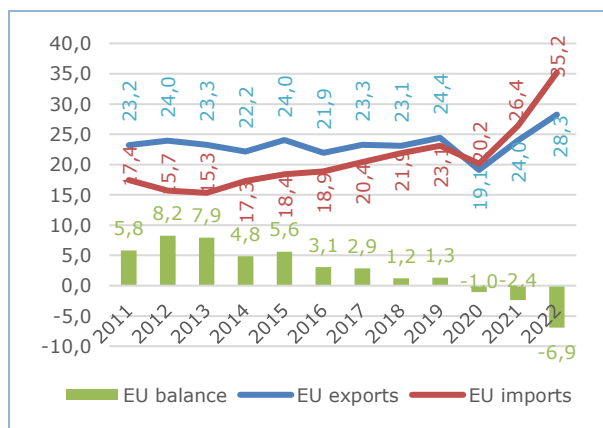
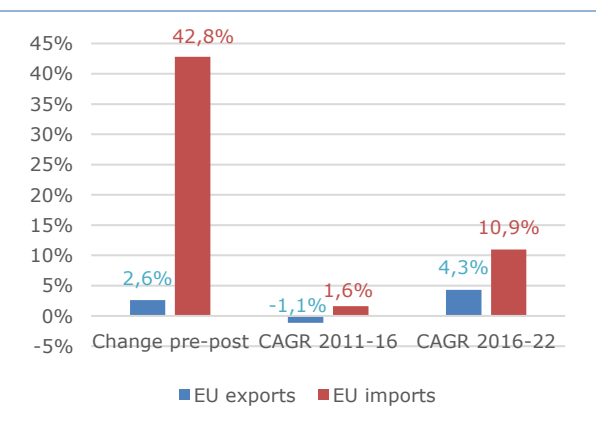


Figure 2: EU27-SADC EPA State bilateral trade, growth rates before and after the EPA’s start of application



Source: Own calculations based on Eurostat COMEXT data.

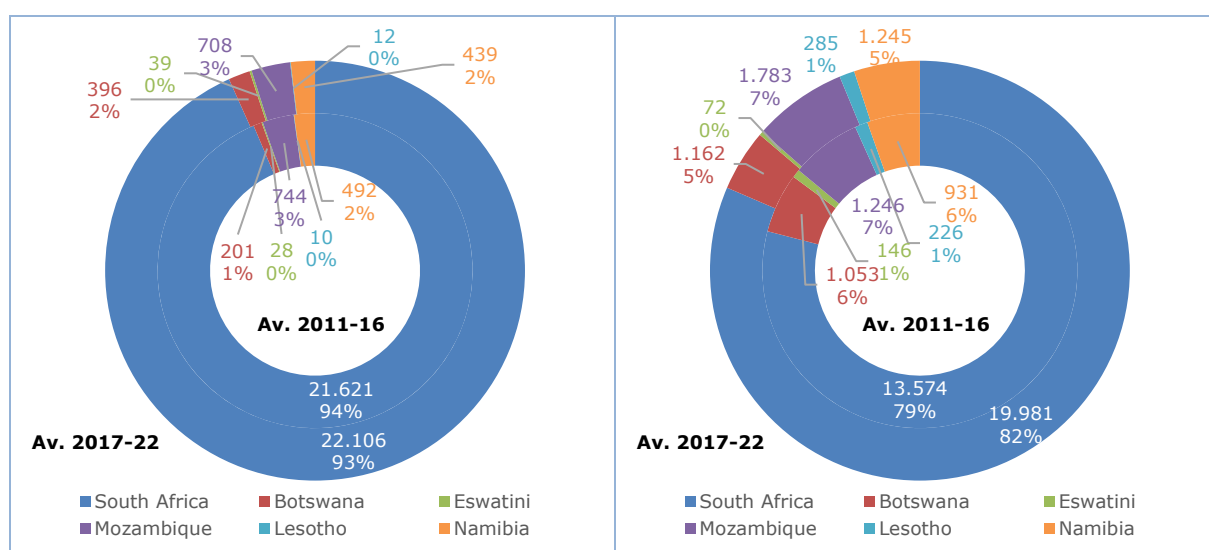
Growth rates in bilateral trade before and after the EPA’s start of application further illustrate these difference in performance but also indicate the positive developments for EU27 imports and exports since the EPA started (Figure 2): both average EU exports to

and imports from the partners in the EPA period (2017-2022) were higher than in the years preceding the EPA (2011-2016), although this growth was much more limited for exports (2.6%) than for imports (42.8%). But average annual growth rates both for EU exports and imports were higher in the EPA period than before (4.3% for exports after an average annual decline of 1.1% in the years before the EPA, and 10.9% for imports, after 1.6% previously), in line with the expectation that the EPA would encourage bilateral trade.

Trade between the EU and the six partner countries is dominated by trade with South Africa. This concentration is stronger for the EU’s exports (Figure 3) than for imports (Figure 4): 93% of total exports to the six countries but only 82% of the imports were destined for, respectively came from, South Africa. Mozambique (3% of EU exports to the region and 7% of imports) and Namibia (2% and 5%) are the next most important trading partners among the SADC EPA States.

Figure 3: EU27 exports to SADC EPA States, 2011-16 vs. 2017-22 (€ million and %)

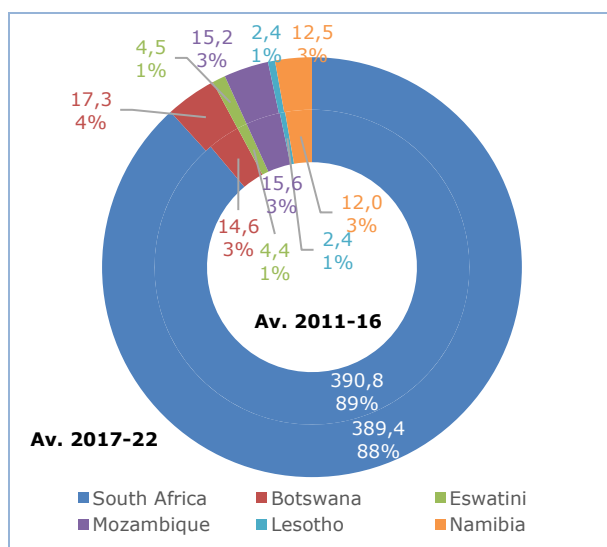
Figure 4: EU27 imports from SADC EPA States, 2011-16 vs. 2017-22 (€ million, %)



Source: Own calculations based on Eurostat COMEXT data.

Overall, the concentration of EU trade with South Africa, among the partner countries, is fully in line with their relative economic size (Figure 5): thus, South Africa accounts for close to 90% of the six countries’ combined GDP, followed by Botswana, Mozambique, and Namibia (each with about 3% of the regional GDP).

Figure 5: GDP of SADC EPA States, 2011-16 vs. 2017-22 (current USD billion and % of SADC EPA total)



Source: Own calculations based on World Development Indicators.

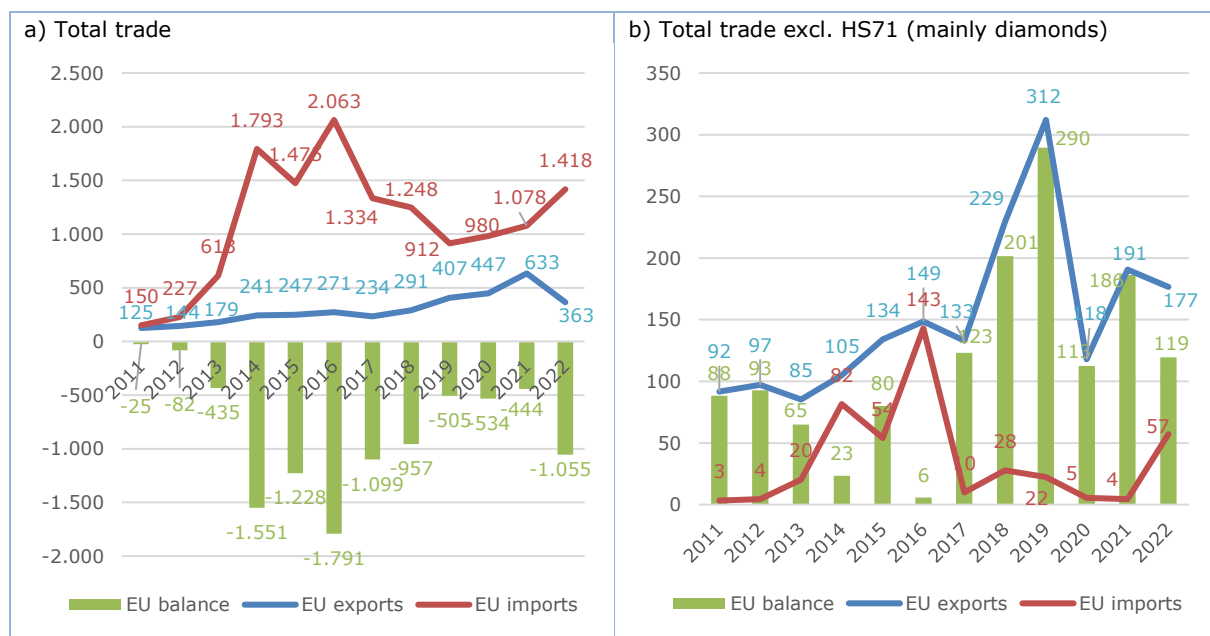
1.2.EU-Botswana trade

Since 2011, EU-Botswana trade has shown an upward trend in both directions: exports to Botswana increased from €125 million in 2011 to €363 million in 2022, and imports

increased from €150 million to €1.4 billion over the same period. Accordingly, the EU’s bilateral trade balance has been consistently negative during the whole period (Figure 6a). Imports increased particularly strongly until 2016, reaching a maximum of €2.1 billion, but then dropped again to €912 million in 2019 before picking up again until 2022; an impact of the EPA is thus not visible from this trend. Conversely, EU exports to Botswana hovered at around €250 million until 2017 but then steadily increased to €633 million in 2021, consistent with the expectation that the EPA would foster trade. Exports however dropped to €363 in 2022.

As bilateral trade is dominated by diamond trade, which arguably is not much affected by the EPA as it benefits from zero MFN duties, Figure 6b shows the development of bilateral trade since 2011 excluding diamonds. This shows increasing EU imports from Botswana until 2016, reaching €143 million, but an almost complete absence of imports in most years since then, contrary to expectations. EU exports to Botswana rapidly increased until 2019, reaching €312 million, but then dropped to less than €200 million since, likely in response to COVID-19. In any case, contrary to overall trade, the EU has had a consistent surplus in its non-diamond trade with Botswana over the period.

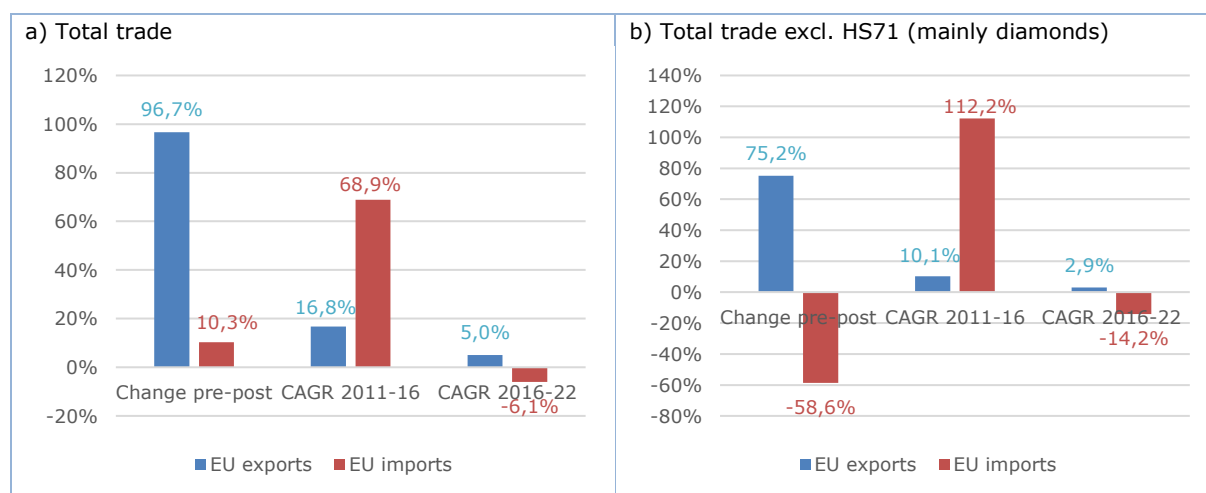
Figure 6: EU27-Botswana bilateral trade, 2011-2022 (€ million)



Source: Own calculations based on Eurostat COMEXT data.

Looking at trade growth rates also shows a mixed picture and no evident effect of the EPA on bilateral trade (Figure 7): average EU exports to Botswana in the EPA period (2017-2022) were 96.7% higher than in the years preceding the EPA (2011-2016), and EU imports from Botswana were also 10.3% higher during the EPA application than before. However, trade growth in both directions was higher before the EPA started to be applied than since then, and EU imports from Botswana actually declined by 6.1% per year on average over the period 2016 to 2022, after strong growth in the years leading up to the start of application. Patterns for non-diamond trade (Figure 7b) are similar, with Botswana’s export performance being even more disappointing: the EU’s post-EPA non-diamond imports from Botswana were almost 60% lower than imports prior to the Agreement.

Figure 7: EU27-Botswana bilateral trade, growth rates before and after EPA start of application



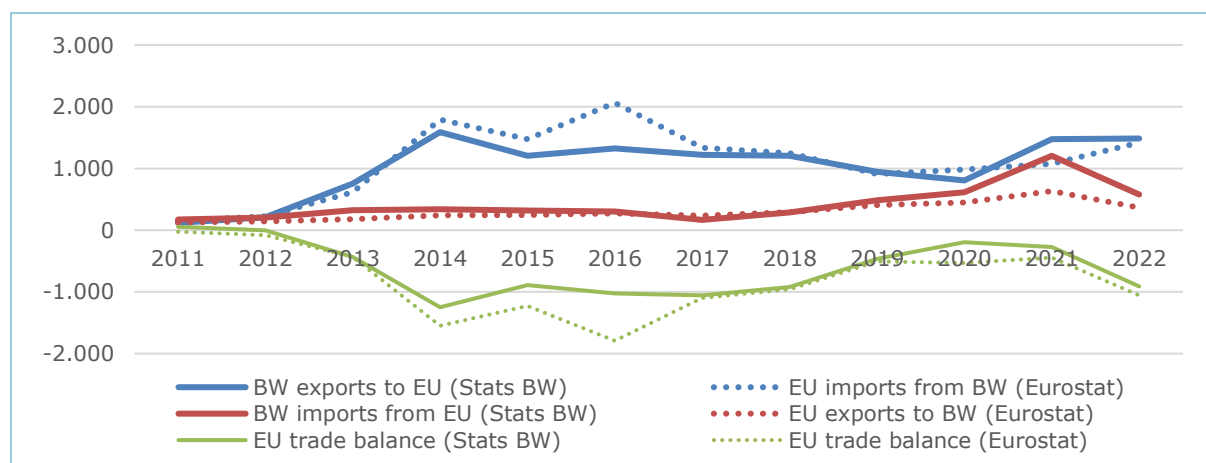
Source: Own calculations based on Eurostat COMEXT data.

In sum, the growth of EU exports to Botswana is largely in line with the expectation that the EPA would contribute to more trade between the Parties – although the EPA’s changes in terms of market access were limited: the EU had already benefited from Botswana’s application of the preferential TDCA rates in the SACU CET. Conversely, the decline in Botswana’s exports to the EU defies the expectations of the EPA as a facilitator for bilateral trade. **Further research will therefore seek to determine the relative overperformance of EU exports to Botswana and the relative underperformance of Botswana’s (non-diamond) exports to the EU since the EPA’s start of application.**

Robustness check: comparison of Eurostat and Statistics Botswana data

A comparison of bilateral trade statistics reported in COMEXT with those reported by Statistics Botswana shows similar trends over time but substantial differences in some years (Figure 8). Notably, reported EU imports from Botswana were substantially higher than corresponding reported exports by Stats BW in 2014 to 2016, whereas Eurostat reported lower trade than Stats BW in both directions in 2021 and 2022. Normally, reported EU imports should be consistently higher than reported exports due to the different reporting basis: import values include the cost of freight and insurance (they are reported as “CIF values”) unlike export values (which are reported as “FOB values”).

Figure 8: EU27-Botswana bilateral trade as reported by Statistics Botswana and Eurostat, 2011-2022 (€ million)



Source: Own calculations based on data provided by Statistics Botswana and Eurostat COMEXT.

Data at sector level show that in absolute terms, the largest differences concern Botswana's exports of diamonds ("stone"), but in relative terms exports of agricultural products, machinery and electronics are most strongly over-reported (or corresponding EU imports under-reported) (Table 3). **This consistent deviation as well as the difference in reported values for diamonds in 2021 and, to a lesser extent, 2022 – with BW-reported exports exceeding EU-reported imports by €397M and €122M, respectively – would require further analysis.**

Table 3: Botswana->EU27 bilateral trade as reported by Statistics Botswana and Eurostat, by sector, 2011-2022

BW exports to EU in EUR million - Stats BW												
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Agriculture	0.5	4.2	17.1	18.4	29.5	27.7	18.8	29.1	29.5	6.5	1.3	0.9
Minerals	0.0	0.0	4.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Chemicals	0.2	0.0	0.0	0.1	0.2	0.3	0.0	0.0	0.1	0.1	0.5	0.3
Textiles	0.1	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0
Stone	114.0	201.0	715.0	1,504.2	1,120.2	1,266.9	1,193.5	1,161.4	916.7	797.2	1,470.7	1,483.3
Metals	0.0	0.0	12.6	62.3	54.2	27.2	0.0	0.0	0.1	0.1	0.4	0.4
Machinery	2.8	1.6	6.5	1.4	2.9	2.3	3.5	4.2	0.5	1.8	2.7	0.7
Vehicles	0.2	0.6	0.3	2.2	0.6	0.8	3.4	12.5	0.1	0.0	0.5	0.0
Electronics	0.6	0.3	0.3	0.4	0.5	1.3	1.5	0.3	1.0	1.0	0.8	1.3
Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	118.3	207.8	756.7	1,589.1	1,208.1	1,326.7	1,220.7	1,207.6	948.0	806.8	1,477.0	1,486.9

EU imports from BW in EUR million - Eurostat												
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Agriculture	1.7	1.8	4.7	5.7	15.9	16.2	8.6	13.2	21.3	3.5	1.5	4.3
Minerals	0.0		0.0	9.3	0.0	0.0		0.0	0.0		0.0	51.2
Chemicals	0.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0
Textiles	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0
Stone	146.7	222.3	593.0	1,711.0	1,420.9	1,919.5	1,323.7	1,220.0	889.9	975.0	1,073.2	1,361.1
Metals	0.0	0.0	14.5	64.8	35.5	125.4	0.0	0.0	0.0	0.0	0.5	0.1
Machinery	0.4	0.5	0.4	0.5	1.6	0.5	0.5	0.5	0.4	0.4	1.5	0.3
Vehicles	0.2	0.6	0.1	0.1	0.4	0.2	0.1	12.5	0.1	0.0	0.0	0.1
Electronics	0.4	1.1	0.2	0.7	0.5	0.3	0.3	0.4	0.3	0.2	0.7	0.8
Other	0.4	0.3	0.4	0.4	0.2	0.4	0.1	1.3	0.2	1.3	0.1	0.4
Total	149.3	225.9	612.9	1,792.1	1,474.3	2,062.0	1,333.2	1,246.0	911.9	979.1	1,077.5	1,418.0

Difference between EU imports from BW reported by Eurostat and BW exports to EU reported by Stats BW (€ million)												
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Agriculture	1.1	-2.4	-12.4	-12.8	-13.6	-11.5	-10.2	-16.0	-8.2	-3.1	0.1	3.4
Minerals	0.0	0.0	-4.9	9.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	51.2
Chemicals	0.0	0.0	0.1	-0.1	-0.2	-0.3	0.0	0.0	-0.1	0.0	-0.4	-0.3
Textiles	0.1	0.0	0.0	0.0	-0.1	-0.1	0.0	0.0	0.0	0.0	0.1	0.0
Stone	32.7	21.3	-122.0	206.8	300.7	652.6	130.2	58.6	-26.8	177.8	-397.5	-122.3
Metals	0.0	0.0	1.9	2.5	-18.7	98.1	0.0	0.0	-0.1	0.0	0.2	-0.3
Machinery	-2.4	-1.1	-6.1	-0.9	-1.3	-1.8	-2.9	-3.7	-0.1	-1.4	-1.2	-0.4
Vehicles	0.0	0.0	-0.2	-2.1	-0.3	-0.6	-3.2	-0.1	0.0	0.0	-0.5	0.1
Electronics	-0.2	0.8	0.0	0.3	-0.1	-1.0	-1.2	0.1	-0.7	-0.8	-0.2	-0.5
Other	0.4	0.3	0.4	0.4	0.2	0.3	0.1	1.3	0.2	1.3	0.1	0.4
Total	31.1	18.1	-143.7	203.0	266.1	735.3	112.6	38.4	-36.0	172.4	-399.5	-68.9

Difference between EU imports from BW reported by Eurostat and BW exports to EU reported by Stats BW (% of EU M)												
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Agriculture	67%	-131%	-264%	-225%	-85%	-71%	-118%	-122%	-38%	-89%	10%	79%
Minerals	..	..	..	100%	..	..	..	..	..	..	..	100%
Chemicals	-10%	..	90%	..	..	..	..	..	..	..	-412%	..
Textiles	60%	..	..	..	..	..	..	..	..	..	69%	..
Stone	22%	10%	-21%	12%	21%	34%	10%	5%	-3%	18%	-37%	-9%
Metals	..	..	13%	4%	-53%	78%	..	..	..	..	31%	-278%
Machinery	-642%	-236%	-1541%	-174%	-79%	-366%	-547%	-779%	-30%	-359%	-85%	-119%
Vehicles	-13%	-3%	-298%	-1870%	-73%	-262%	-2167%	0%	-25%	..	..	88%
Electronics	-47%	71%	-7%	43%	-14%	-338%	-380%	20%	-196%	-350%	-27%	-66%
Other	100%	100%	100%	99%	100%	98%	100%	100%	96%	100%	100%	100%
Total	21%	8%	-23%	11%	18%	36%	8%	3%	-4%	18%	-37%	-5%

Source: Own calculations based on data provided by Statistics Botswana and Eurostat COMEXT.

1.3.EU-Eswatini trade

Trade between the EU27 and Eswatini has declined from 2011 to 2022, mostly as a result of reduced exports by Eswatini (Figure 9): since reaching a peak in 2013, at €219 million, they dropped to levels at around €60-70 million in the most recent years. EU exports to Eswatini increased in the pre-EPA period, from around €20 million in 2011 to €47 million in 2016, and have since remained flat (€48 million in 2022). The EU's bilateral trade balance with Eswatini has been consistently negative during the whole period, with the

trade deficit fluctuating widely between €4 million (in 2018) and €199 (in 2013) but a declining trend in recent years. An impact of the EPA is not visible from these overall trade trends.

Trade growth rates also show a mixed picture and no clear effect of the EPA on bilateral trade (Figure 10): on the positive side, average EU exports to Eswatini in the EPA period (2017-2022) were 42% higher than in the years preceding the EPA (2011-2016) – but EU imports from Eswatini were 51% lower since the EPA started to be applied than before. Average annual growth rates for EU exports dropped substantially since 2016, and EU imports from Eswatini also continued to decline, although at a lower annual rate (-5.4%) than in the years before the EPA start of application (-10.1%).

Figure 9: EU27-Eswatini bilateral trade, 2011-2022 (€ million)

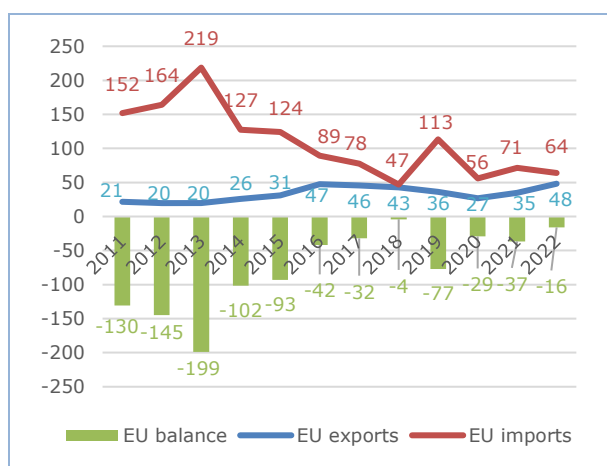
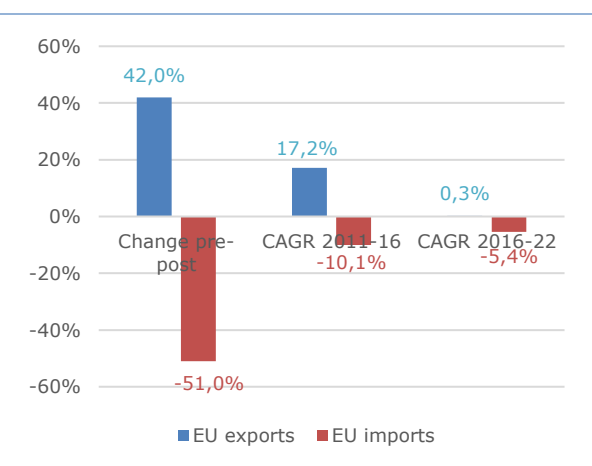


Figure 10: EU27-Eswatini bilateral trade, growth rates before and after EPA start of application



Source: Own calculations based on Eurostat COMEXT data.

In sum, the development of trade between the EU and Eswatini is not in line with the expectation that the EPA would contribute to more trade between the Parties. However, it should be noted that the EPA's changes in terms of market access were limited: the EU had already benefitted from Eswatini's application of the preferential TDCA rates in the SACU CET, and therefore a major increase in EU exports to Eswatini since the start of the EPA's application should not be expected. Similarly, with Eswatini already benefitting from unilateral preferential access to the EU, and hence a major increase in exports should not have been expected. Nevertheless, **the steep decline in Eswatini's exports to the EU from 2013 to 2018 remains to be further investigated.**

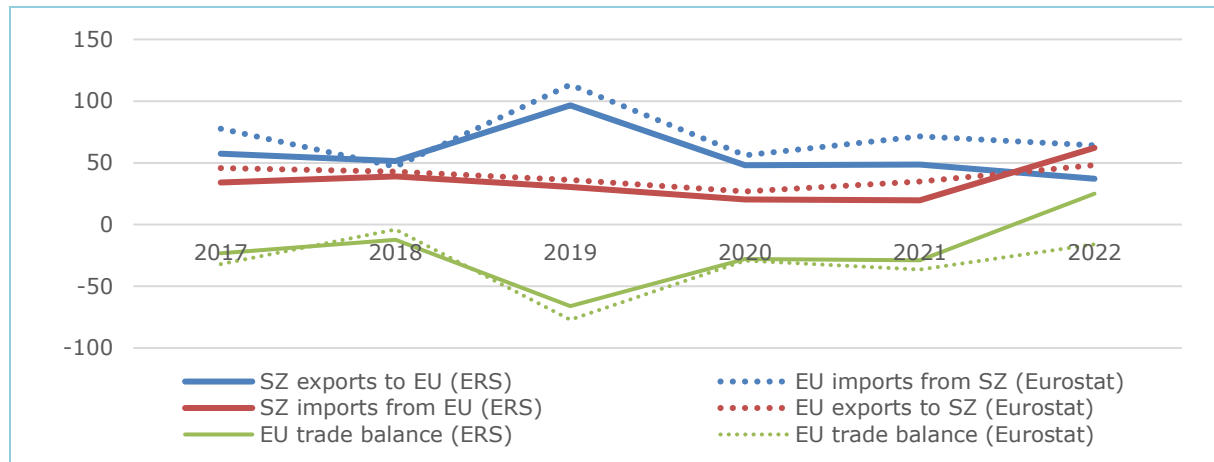
Robustness check: comparison of Eurostat and Eswatini Revenue Services data

Detailed Eswatini official trade data could be obtained from the Eswatini Revenue Service (ERS) only for the period 2017 to 2022, not for earlier years. Comparing these bilateral trade statistics with those reported in Eurostat's COMEXT database shows a high degree of consistency (Figure 11). Reported trade from the Eswatini to the EU is fully in line with expectations: levels are comparable, with reported imports by the EU being somewhat higher than reported exports on the Eswatini side, due to the different reporting bases (import CIF values including the cost of freight and insurance, unlike export FOB values). Trade data in the other direction, i.e. from the EU to Eswatini, are also quite similar, with reported export values by Eurostat exceeding reported import values by the Eswatini Revenue Service, except for 2022.² The resulting bilateral trade balances are almost

² Unlike the EU, SACU countries report imports on FOB basis, and hence values of reported EU exports and reported SACU imports should match.

identical for the years 2017 to 2021, showing a deficit for the EU, but differ for 2022, where Eurostat data show an EU deficit, whereas ERS data show an Eswatini deficit. This difference could however be reconciled when the different valuations of imports and exports are considered: the EU “overvalues” its imports due to the inclusion of CIF compared to its exports and thus presents a more pessimistic view of its position in the bilateral trade balance.

Figure 11: EU27-Eswatini bilateral trade as reported by Eswatini Revenue Service and Eurostat, 2017-2022 (€ million)



Source: Own calculations based on data provided by Eswatini Revenue Service and Eurostat COMEXT.

Due to the small values of trade between the EU and Eswatini in most sectors, a comparison of reported data by Eurostat and the ERS should be treated with care. In any case, data for the largest Eswatini export sector, agriculture, are coherent (with EU-reported imports being somewhat higher than Eswatini-reported exports). Likewise, reported data by the two sides for the EU’s main three export sectors to Eswatini, chemicals, agriculture and machinery, are of the same order of magnitude (Table 4). **There are thus no major differences in reported trade data by the two partners** that would warrant further and more detailed analysis.

Table 4: Eswatini-EU27 bilateral trade as reported by ERS and Eurostat, by broad sector, 2017-2022

a) Exports from Eswatini

SZ exports to EU in EUR million - ERS						
	2017	2018	2019	2020	2021	2022
Agriculture	51.1	50.8	96.2	47.8	47.9	32.9
Minerals	0.00	0.00	0.00	0.00	0.00	0.00
Chemicals	5.93	0.37	0.19	0.07	0.30	1.46
Textiles	0.01	0.02	0.01	0.02	0.03	0.11
Stone	0.02	0.02	0.03	0.02	0.02	0.03
Metals	0.00	0.00	0.01	0.00	0.00	0.00
Machinery	0.07	0.11	0.11	0.06	0.16	2.57
Vehicles	0.01	0.00	0.00	0.00	0.01	0.00
Electronics	0.02	0.01	0.05	0.06	0.04	0.05
Other	0.14	0.00	0.01	0.02	0.02	0.00
Total	57.3	51.4	96.6	48.0	48.5	37.1

b) Imports by Eswatini

SZ imports from EU in EUR million - ERS						
	2017	2018	2019	2020	2021	2022
Agriculture	5.9	5.4	7.0	3.5	2.4	6.6
Minerals	0.4	0.2	0.5	1.3	0.2	0.2
Chemicals	21.7	21.1	7.0	9.3	10.3	45.2
Textiles	2.3	6.4	8.5	4.0	1.0	3.1
Stone	0.0	0.3	0.2	0.2	0.0	0.3
Metals	0.1	0.1	0.1	0.1	0.0	0.5
Machinery	2.9	3.8	6.0	1.5	4.9	5.0
Vehicles	0.1	0.9	0.5	0.0	0.0	0.3
Electronics	0.6	0.7	0.6	0.3	0.8	0.9
Other	0.2	0.1	0.1	0.0	0.1	0.1
Total	34.1	39.0	30.5	20.2	19.6	62.1

EU imports from SZ in EUR million - Eurostat

	2017	2018	2019	2020	2021	2022
Agriculture	60.9	39.8	105.6	43.7	60.5	53.0
Minerals					0.00	0.00
Chemicals	11.49	6.57	6.00	5.72	9.38	7.81
Textiles	0.03	0.03	0.03	0.07	0.10	0.12
Stone	0.02	0.02	0.04	0.04	0.04	0.13
Metals	0.02	0.01	0.03	0.01	0.03	0.02
Machinery	2.40	0.41	0.89	0.72	1.09	1.37
Vehicles	0.02	0.03	0.00	0.00	0.02	0.05
Electronics	0.14	0.04	0.64	0.13	0.21	1.60
Other	2.64	0.02	0.00	5.66	0.03	0.01
Total	77.7	46.9	113.3	56.1	71.4	64.1

EU exports to SZ in EUR million - Eurostat

	2017	2018	2019	2020	2021	2022
Agriculture	9.9	8.8	4.9	3.5	4.1	5.0
Minerals	0.4	0.4	0.5	0.9	0.2	0.1
Chemicals	25.1	20.5	13.8	16.5	22.8	27.4
Textiles	5.7	6.9	9.9	0.8	2.3	9.1
Stone	1.0	1.6	0.4	1.1	0.0	0.0
Metals	0.2	0.1	0.2	0.2	0.2	0.1
Machinery	2.5	2.7	4.1	1.6	2.7	5.5
Vehicles	0.0	0.2	0.5	0.2	1.3	0.1
Electronics	0.4	1.4	1.3	0.4	1.0	0.6
Other	0.4	0.3	0.6	1.5	0.4	0.2
Total	45.6	42.9	36.1	26.8	34.8	48.1

Difference between EU imports from SZ reported by Eurostat and SZ exports to EU reported by ERS (€ million)

	2017	2018	2019	2020	2021	2022
Agriculture	9.81	-11.04	9.47	-4.02	12.59	20.09
Minerals	0.00	0.00	0.00	0.00	0.00	0.00
Chemicals	5.56	6.20	5.82	5.65	9.08	6.35
Textiles	0.02	0.01	0.02	0.05	0.08	0.01
Stone	0.00	0.00	0.01	0.02	0.02	0.09
Metals	0.02	0.01	0.02	0.01	0.03	0.02
Machinery	2.33	0.30	0.77	0.66	0.92	-1.20
Vehicles	0.01	0.03	0.00	0.00	0.01	0.05
Electronics	0.12	0.03	0.59	0.08	0.17	1.55
Other	2.50	0.02	0.00	5.64	0.00	0.01
Total	20.37	-4.45	16.70	8.10	22.91	26.99

Difference between EU exports to SZ reported by Eurostat and SZ imports from EU reported by ERS (€ million)

	2017	2018	2019	2020	2021	2022
Agriculture	4.0	3.4	-2.1	0.1	1.7	-1.5
Minerals	0.0	0.1	0.0	-0.3	0.0	-0.1
Chemicals	3.4	-0.7	6.8	7.3	12.5	-17.8
Textiles	3.4	0.6	1.4	-3.1	1.3	5.9
Stone	0.9	1.2	0.2	0.8	0.0	-0.3
Metals	0.0	0.0	0.0	0.0	0.1	-0.3
Machinery	-0.3	-1.1	-1.9	0.1	-2.2	0.6
Vehicles	0.0	-0.7	0.0	0.2	1.3	-0.2
Electronics	-0.1	0.7	0.7	0.1	0.3	-0.3
Other	0.2	0.2	0.5	1.5	0.3	0.1
Total	11.5	3.9	5.6	6.6	15.2	-14.0

Difference between EU imports from SZ reported by Eurostat and SZ exports to EU reported by ERS (% of EU imports)

	2017	2018	2019	2020	2021	2022
Agriculture	16%	-28%	9%	-9%	21%	38%
Minerals	..	..	..	..	..	..
Chemicals	48%	94%	97%	99%	97%	81%
Textiles	..	..	..	67%	73%	9%
Stone	..	..	..	..	..	73%
Metals	..	..	..	..	..	..
Machinery	97%	72%	88%	91%	85%	-87%
Vehicles	..	..	..	..	..	100%
Electronics	87%	..	92%	57%	83%	97%
Other	95%	..	..	100%	..	..
Total	26%	-9%	15%	14%	32%	42%

Difference between EU exports to SZ reported by Eurostat and SZ imports from EU reported by ERS (% of EU exports)

	2017	2018	2019	2020	2021	2022
Agriculture	40%	39%	-43%	2%	40%	-31%
Minerals	10%	35%	1%	-37%	-5%	-105%
Chemicals	14%	-3%	49%	44%	55%	-65%
Textiles	59%	8%	14%	-378%	59%	65%
Stone	95%	79%	56%	78%	..	..
Metals	14%	-26%	19%	32%	83%	-219%
Machinery	-12%	-41%	-46%	7%	-83%	10%
Vehicles	..	-305%	-5%	90%	99%	-281%
Electronics	-31%	53%	53%	27%	25%	-57%
Other	52%	79%	84%	98%	71%	59%
Total	25%	9%	16%	25%	44%	-29%

Source: Own calculations based on data provided by ERS and Eurostat COMEXT.

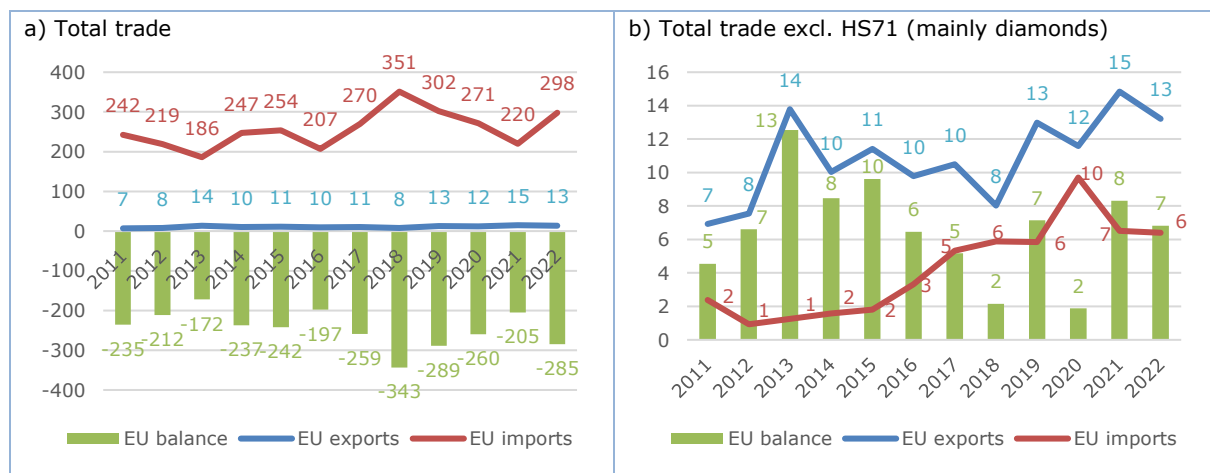
1.4.EU-Lesotho trade

Trade between the EU and Lesotho performed unevenly since 2011 (Figure 12a). This is mostly due to the volatility of Lesotho's exports to the EU, whereas EU exports to Lesotho were relatively stable – and minimal: they never exceeded €15 million (in 2021), although the trend has largely been positive since 2018. With respect to EU imports from Lesotho, these fluctuated at around €200-250 million until 2016, then increased sharply to €351 in 2018 before dropping again to €220 million in 2021 and finally picking up in 2022, to €298 million. Considering these values and the almost complete absence of EU exports to

Lesotho, the EU’s bilateral trade balance has been consistently negative during the whole period, at values close to the value of imports from Lesotho, i.e. above €200 million.

As bilateral trade is dominated by diamond trade, which arguably is not much affected by the EPA as it benefits from zero MFN duties, Figure 12b shows the development of bilateral trade since 2011 excluding diamonds. This presents a fairly different picture: EU non-diamond imports from Lesotho increased from €2 million and less before the EPA to €10 million in 2020 (and still €6 in 2022). Although still very limited in terms of absolute values, the rapid increase is in line with expectations that the EPA would foster trade between the Parties. Similarly, as noted above, EU exports also grew between 2018 and 2022, although this positive trend only reversed an earlier decline from 2013 to 2018 – all, as noted above, at very modest values. Only considering non-diamond trade, the EU’s bilateral trade balance with Lesotho was consistently positive during the period 2011 to 2022, but on average bilateral non-diamond trade was more balanced since the start of the EPA’s application.

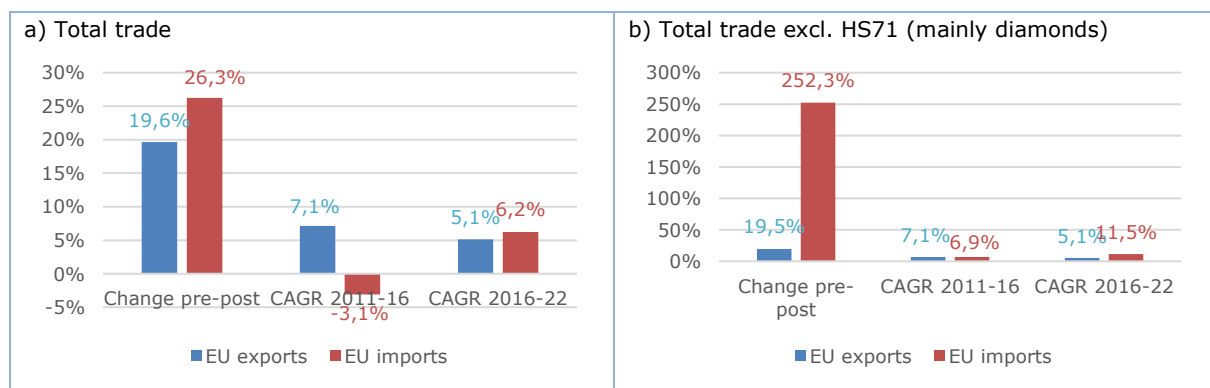
Figure 12: EU27-Lesotho bilateral trade, 2011-2022 (€ million)



Source: Own calculations based on Eurostat COMEXT data.

Trade growth rates largely confirm the positive trends and are in line with expectations that the EPA would promote bilateral trade (Figure 13): trade in both directions in the EPA period (2017-2022) was higher than in the years preceding the EPA (2011-2016): EU exports by about 20%, and Lesotho’s exports by about 26% (total exports, Figure 13a) and 250% (non-diamond exports, Figure 13b). Also, the average annual growth of EU imports from Lesotho was higher in the EPA period than before, both for total imports and non-diamond imports. Conversely, EU exports to Lesotho continued to grow at roughly the same rate since the EPA’s start of application than before.

Figure 13: EU27-Lesotho bilateral trade, growth rates before and after EPA start of application



Source: Own calculations based on Eurostat COMEXT data.

In sum, the performance of bilateral trade between the EU27 and Lesotho is largely in line with the expectation that the EPA would encourage more trade between the Parties (even considering, as noted before, that the EPA’s changes in terms of market access were limited). **The steep increase in Lesotho’s non-diamond exports to the EU, although still very modest, is particularly encouraging, and requires more detailed analysis to determine the extent to which this growth can be attributed to the EPA.**

Robustness check: comparison of Eurostat and Lesotho’s official trade statistics

This analysis will be added once Lesotho’s official trade statistics have been obtained.

1.5.EU-Mozambique trade

EU imports from Mozambique remained flat, at about €1.2 billion, from 2011 to 2016. They then increased to €1.7 billion in 2018 but dropped again, after the start of application of the EPA for Mozambique, to €1.2 billion in 2020 during the covid-19 pandemic, before increasing steeply to €2.9 billion in 2022 (Figure 14). The increase in 2022 is likely the result of the country’s aluminium producer, Mozal, not being able to ship the usual level of exports during the pandemic years 2020 and 2021 and thus stockpiling production, which was then finally exported in 2022.

EU exports to Mozambique also initially increased, reaching a peak of €940 million in 2015, but then declined to €505 million in 2017. Since then, exports steadily increased again, reaching €868 million in 2022. The EU’s bilateral trade balance with Mozambique was consistently negative during the whole period, with the average trade deficit being larger in the EPA period compared to earlier years, and reaching a maximum of €2 billion in 2022, almost double the previous record during the period since 2011, of €1.1 billion in 2018.

Bilateral trade growth rates are fully in line with the expectation that the EPA would encourage trade between the Parties (Figure 15): not only was average trade between the EU and Mozambique in the EPA period (2019-2022) higher than in the preceding years (2013-2018) – EU exports by 6%; EU imports by 29% – but average annual growth rates of trade in both directions were also higher in the years since the EPA started to be applied: EU exports increased by 6.7% per year on average, compared to a decrease by 3.1% in the pre-EPA years, and EU imports from Mozambique increased by 13.5% per year, compared to 7.3% previously.

Figure 14: EU27-Mozambique bilateral trade, 2011-2022 (€ million)

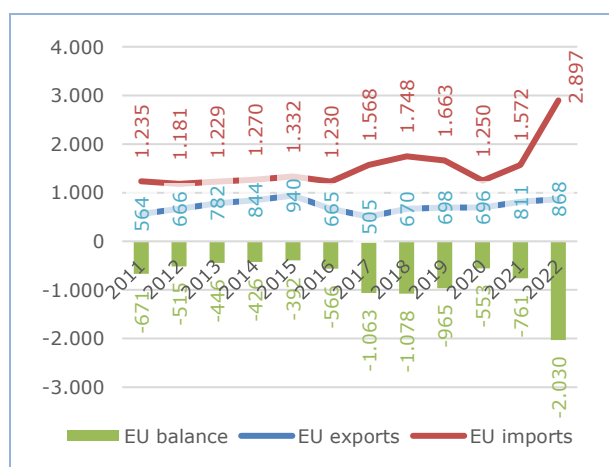
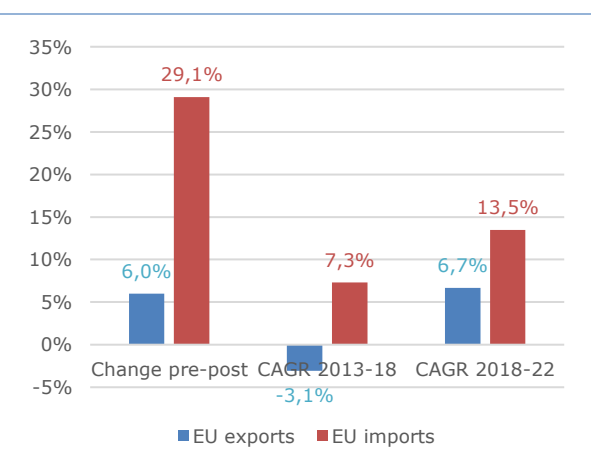


Figure 15: EU27-Mozambique bilateral trade, growth rates before and after EPA start of application



Source: Own calculations based on Eurostat COMEXT data.

In sum, the development of trade between the EU and Mozambique is largely in line with the expectation that the EPA would promote trade between the Parties. In particular, the increase in EU exports to Mozambique is consistent with the preferential market access for EU products granted under the EPA. Conversely, Mozambique’s products already benefitted from preferential access to the EU market even before the EPA under the Everything But Arms arrangement, and hence the EPA did not provide any further tariff liberalisation. Therefore the lack of any increase in EU imports from Mozambique after 2018 should not be surprising. Rather, **the steep increase in EU imports from Mozambique in 2022 requires further investigation, notably the extent to which the EPA contributed to it.**

Robustness check: comparison of Eurostat and Mozambique’s official trade statistics

This analysis remains to be done based on Mozambique’s official trade statistics obtained from the customs authority.

1.6.EU-Namibia trade

Since 2011, EU27 imports from Namibia have increased by about 50%, from €905 million in 2011 to €1.3 billion in 2022. Conversely, EU exports to Namibia were largely flat over the period - €469 million in 2011 and €562 million in 2022. Accordingly, the EU’s bilateral trade balance has been consistently negative during the whole period, hovering at around €800 million since 2017 (Figure 16). Imports increased most until 2017, then dropped in 2019 and 2020 before picking up again in 2021 and 2022, to reach levels slightly above 2017 and 2018; an impact of the EPA is not visible from this trend, as much of the growth occurred before the start of the Agreement’s application. Similarly, for EU exports to Namibia no effect of the EPA can be deduced from the trend analysis.

Looking at trade growth rates also shows a mixed picture and no clear effect of the EPA on bilateral trade (Figure 17): on the positive side, average EU imports from Namibia in the EPA period (2017-2022) were 33.7% higher than in the years preceding the EPA (2011-2016) – but EU exports to Namibia were 10.8% lower since the EPA started to be applied than before. However, average annual growth rates for trade in both directions were higher since the EPA started to be applied than before.

Figure 16: EU27-Namibia bilateral trade, 2011-2022 (€ million)

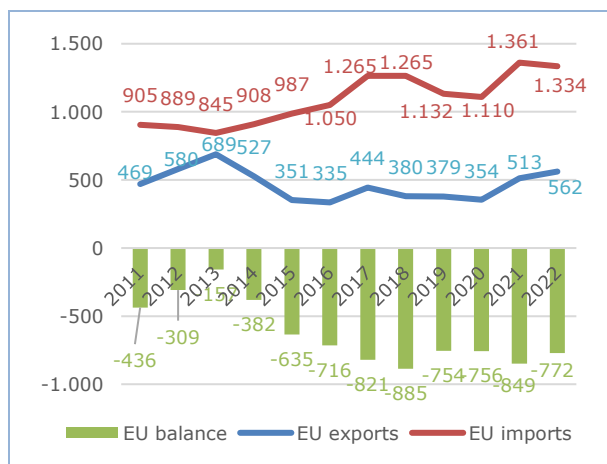
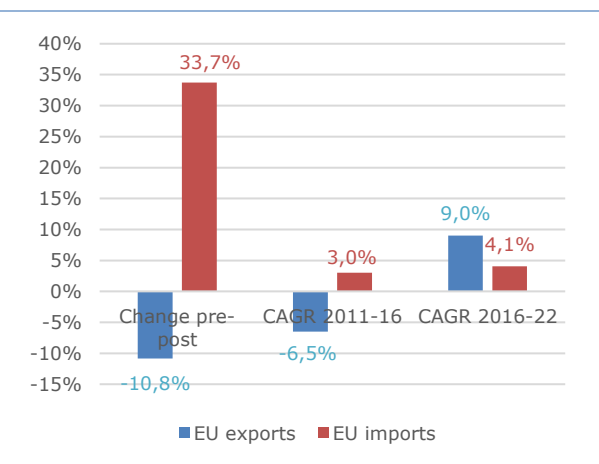


Figure 17: EU27-Namibia bilateral trade, growth rates before and after EPA start of application



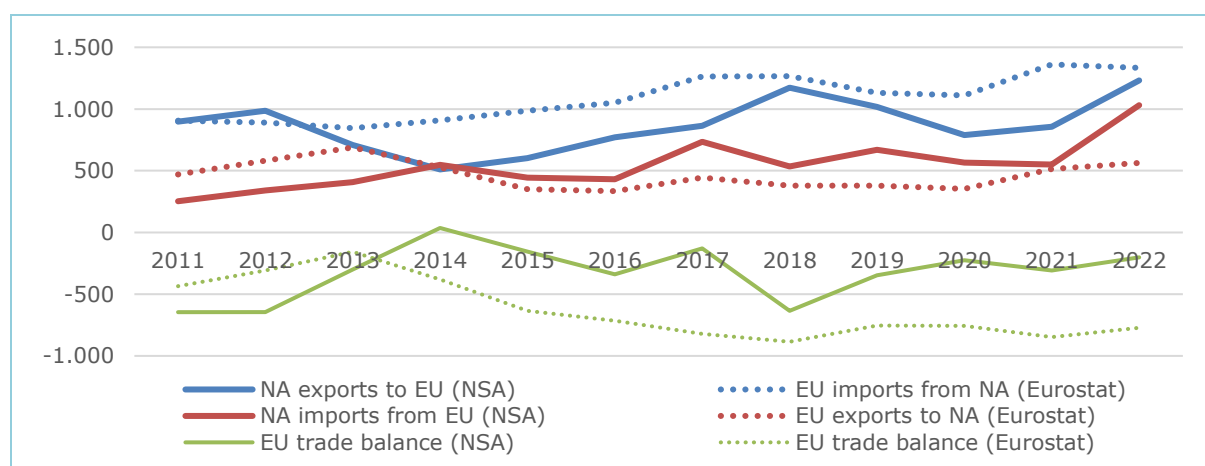
Source: Own calculations based on Eurostat COMEXT data.

In sum, the growth of EU imports from Namibia is largely in line with the expectation that the EPA would contribute to more trade between the Parties, as is the fact that average annual growth rates of bilateral trade were higher in the EPA period than before. At the same time, the EPA's changes in terms of market access were limited: the EU had already benefitted from Namibia's application of the preferential TDCA rates in the SACU CET, and therefore a major increase in EU exports to Namibia since the start of the EPA's application should not be expected. Similarly, with Namibia already benefitting from unilateral preferential access to the EU, the EPA provided only limited changes in access to the EU market; the continuation of the previously existing growth of Namibia's exports to the EU under the EPA is therefore not surprising.

Robustness check: comparison of Eurostat and Namibia Statistics Agency data

A comparison of bilateral trade statistics reported in COMEXT with those reported by Namibia Statistics agency shows similar trends over time but substantial differences in some years (Figure 18). For most years, reported imports by Namibia are higher than the corresponding reported exports by the EU (and vice versa). However, for 2022 Namibia reports a strong increase in both exports to and imports from the EU, whereas Eurostat reports stagnating trade in both directions. As a result, the bilateral trade trend analysis since 2016 is more positive according to Namibian statistics, compared to EU statistics. Both sources however concur that the EU has seen a consistent and stable deficit in its bilateral trade with Namibia.

Figure 18: EU27-Namibia bilateral trade as reported by Namibia Statistics Agency and Eurostat, 2011-2022 (€ million)



Source: Own calculations based on data provided by Namibia Statistics Agency and Eurostat COMEXT.

Data at broad sector level show that differences in reported statistics vary hugely across sectors, time and direction of trade (Table 5). Indeed, apart from a few sectors – such as Namibian agriculture exports to the EU or EU electronics exports to Namibia – discrepancies between the two sources are high. **This points to the need for further analysis – if possible during this evaluation – and closer collaboration between the EU and Namibian statistics bodies to reconcile trade statistics.**

Table 5: Namibia-EU27 bilateral trade as reported by Namibia Statistics Agency and Eurostat, by broad sector, 2011-2022

a) Exports from Namibia

NA exports to EU in EUR million - NSA

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Agriculture	333.4	343.8	314.9	294.2	295.5	409.6	395.8	412.4	422.9	370.1	408.7	483.1
Minerals	134.8	236.5	176.8	84.1	133.8	156.6	169.5	252.1	151.1	41.3	97.4	392.7
Chemicals	1.8	2.4	3.1	3.2	3.0	4.2	1.6	2.8	2.5	35.0	46.4	110.6
Textiles	2.7	2.9	2.3	2.9	2.5	2.9	2.7	2.9	3.0	2.0	1.7	1.6
Stone	84.9	80.0	62.8	54.4	46.4	115.3	106.6	90.1	108.8	95.3	104.6	120.1
Metals	332.6	282.2	88.0	55.6	110.7	79.4	183.2	405.8	320.7	239.6	195.1	118.0
Machinery	4.3	4.9	6.8	6.0	4.4	1.5	1.1	1.9	2.7	2.6	1.4	2.9
Vehicles	2.6	31.8	51.5	7.9	3.3	1.3	0.9	1.3	2.6	1.5	0.5	0.1
Electronics	0.9	0.4	0.6	0.8	0.6	0.0	0.0	0.1	0.4	0.3	0.5	0.3
Other	0.7	0.6	0.9	1.5	1.1	1.0	1.6	2.7	1.8	1.4	1.3	2.4
Total	898.7	985.4	707.8	510.7	601.2	771.8	862.9	1,172.0	1,016.5	789.1	857.6	1,231.9

EU imports from NA in EUR million - Eurostat

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Agriculture	305.3	317.9	325.3	334.9	365.3	377.1	403.1	434.1	470.3	382.3	424.8	498.4
Minerals	37.0	57.3	46.9	61.9	43.2	24.8	57.5	53.7	46.7	20.5	41.5	56.7
Chemicals	64.6	103.0	105.9	91.4	146.1	100.6	68.4	6.5	16.6	26.6	63.4	65.6
Textiles	0.1	0.3	0.1	0.2	0.2	0.4	0.2	0.6	0.2	0.1	0.2	0.4
Stone	42.3	40.9	51.7	53.5	47.8	123.1	126.6	114.0	135.4	126.5	176.2	145.6
Metals	449.3	361.9	307.8	361.1	372.2	416.4	601.0	639.0	452.1	537.8	423.7	557.0
Machinery	2.5	2.7	2.9	2.3	2.4	3.5	2.6	3.0	3.6	2.5	2.0	1.8
Vehicles	0.2	0.6	0.7	0.6	0.5	0.9	1.3	1.0	2.2	2.4	227.4	0.4
Electronics	0.3	1.5	1.0	0.4	1.4	0.7	0.6	0.5	1.3	4.4	0.4	0.9
Other	3.9	3.0	2.8	2.0	7.4	2.8	3.3	12.8	3.9	7.2	1.8	7.4
Total	905.5	889.2	845.1	908.3	986.6	1,050.4	1,264.6	1,265.2	1,132.3	1,110.3	1,361.3	1,334.1

Difference between EU imports from NA reported by Eurostat and NA exports to EU reported by NSA (€ million)

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Agriculture	-28.1	-25.9	10.4	40.7	69.8	-32.5	7.3	21.7	47.4	12.2	16.0	15.3
Minerals	-97.7	-179.3	-129.8	-22.1	-90.5	-131.8	-112.0	-198.4	-104.3	-20.8	-56.0	-336.0
Chemicals	62.8	100.7	102.8	88.2	143.1	96.4	66.8	3.7	14.1	-8.5	16.9	-45.1
Textiles	-2.6	-2.5	-2.2	-2.7	-2.3	-2.4	-2.5	-2.4	-2.8	-1.9	-1.5	-1.2
Stone	-42.6	-39.1	-11.1	-0.9	1.4	7.8	20.1	24.0	26.6	31.2	71.7	25.5
Metals	116.7	79.7	219.8	305.5	261.5	337.1	417.8	233.2	131.4	298.2	228.6	439.0
Machinery	-1.9	-2.3	-3.9	-3.7	-2.0	2.0	1.5	1.1	0.9	-0.1	0.6	-1.1
Vehicles	-2.4	-31.2	-50.8	-7.3	-2.8	-0.4	0.4	-0.3	-0.4	0.9	227.0	0.3
Electronics	-0.6	1.2	0.4	-0.4	0.8	0.6	0.5	0.4	0.9	4.1	-0.1	0.6
Other	3.3	2.4	1.9	0.4	6.3	1.8	1.7	10.1	2.1	5.8	0.4	5.0
Total	6.8	-96.2	137.3	397.7	385.3	278.6	401.7	93.2	115.9	321.2	503.7	102.2

Difference between EU imports from NA reported by Eurostat and NA exports to EU reported by NSA (% of EU M)

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Agriculture	-9%	-8%	3%	12%	19%	-9%	2%	5%	10%	3%	4%	3%
Minerals	-264%	-313%	-276%	-36%	-209%	-530%	-195%	-370%	-223%	-101%	-135%	-593%
Chemicals	97%	98%	97%	96%	98%	96%	98%	58%	85%	-32%	27%	-69%
Textiles	-2263%	-749%	-2263%	-1105%	-1130%	-566%	-1247%	-430%	-1329%	-2073%	-655%	-331%
Stone	-101%	-96%	-22%	-2%	3%	6%	16%	21%	20%	25%	41%	18%
Metals	26%	22%	71%	85%	70%	81%	70%	36%	29%	55%	54%	79%
Machinery	-75%	-84%	-135%	-162%	-81%	57%	58%	37%	24%	-4%	29%	-64%
Vehicles	-1268%	-5174%	-7692%	-1191%	-518%	-45%	29%	-25%	-18%	37%	100%	70%
Electronics	-212%	76%	36%	-115%	58%	96%	94%	83%	71%	93%	-28%	69%
Other	83%	81%	67%	22%	86%	64%	53%	79%	53%	80%	24%	67%
Total	1%	-11%	16%	44%	39%	27%	32%	7%	10%	29%	37%	8%

(continues)

b) Imports by Namibia

NA imports from EU in EUR million - NSA

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Agriculture	40.2	48.8	56.5	66.2	65.3	67.0	56.8	65.9	66.6	49.3	77.3	129.9
Minerals	10.7	66.0	102.2	182.3	121.1	165.8	473.4	251.8	317.1	293.1	189.9	351.1
Chemicals	22.3	26.2	32.5	30.2	41.4	51.8	47.7	59.9	81.7	80.4	111.6	144.6
Textiles	3.6	3.5	3.2	4.8	8.6	4.7	3.6	4.8	6.9	6.4	8.9	8.4
Stone	17.8	14.2	4.8	3.1	3.6	6.2	2.8	2.0	3.4	3.0	3.4	10.8
Metals	24.8	17.8	12.3	18.3	16.6	19.4	12.1	13.5	46.0	14.8	19.8	16.0
Machinery	87.9	69.4	65.7	182.4	98.5	70.9	69.1	56.7	66.8	67.2	93.3	145.0
Vehicles	11.5	67.6	105.8	16.5	39.5	23.3	40.1	56.0	65.1	35.0	25.7	194.3
Electronics	33.3	25.8	24.5	42.3	49.0	21.7	28.5	24.0	14.7	15.1	18.5	29.7
Other	0.8	0.8	0.8	0.9	1.7	0.9	0.8	1.2	1.0	0.4	1.0	1.2
Total	253.0	340.0	408.2	547.2	445.1	431.6	734.9	535.9	669.3	564.7	549.3	1,031.0

EU exports to NA in EUR million - Eurostat

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Agriculture	41.9	37.5	35.0	43.7	35.2	42.9	51.6	45.1	43.9	31.7	44.5	73.4
Minerals	182.5	261.1	230.7	208.2	108.0	124.4	219.5	150.4	153.5	165.7	147.1	248.0
Chemicals	22.1	23.7	26.3	17.8	18.6	22.7	18.1	19.6	25.8	20.1	26.1	37.1
Textiles	3.7	4.8	3.6	5.2	6.6	4.8	2.9	4.4	7.2	3.3	8.6	5.8
Stone	11.1	8.3	8.2	4.1	5.0	6.4	7.1	4.4	3.4	4.0	6.9	19.5
Metals	23.0	11.7	13.1	29.3	19.9	11.9	13.8	16.9	26.0	13.8	15.2	10.3
Machinery	81.8	87.7	105.6	146.8	98.3	75.3	64.6	63.8	71.6	61.2	75.9	93.6
Vehicles	9.5	102.9	230.4	12.0	16.6	13.0	33.9	41.8	21.2	30.5	159.4	33.8
Electronics	29.3	21.5	22.1	35.8	24.4	18.0	21.3	21.7	14.3	12.7	15.2	26.7
Other	64.4	21.1	13.6	23.7	18.8	15.5	11.0	11.5	11.7	11.3	13.8	14.0
Total	469.2	580.4	688.5	526.6	351.3	334.9	443.9	379.7	378.5	354.2	512.8	562.3

Difference between EU exports to NA reported by Eurostat and NA imports from EU reported by NSA (€ million)

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Agriculture	1.7	-11.3	-21.4	-22.6	-30.1	-24.1	-5.2	-20.8	-22.7	-17.6	-32.8	-56.5
Minerals	171.8	195.1	128.4	25.9	-13.1	-41.4	-253.9	-101.3	-163.6	-127.5	-42.8	-103.1
Chemicals	-0.3	-2.5	-6.1	-12.4	-22.8	-29.1	-29.6	-40.4	-56.0	-60.2	-85.4	-107.6
Textiles	0.2	1.3	0.3	0.4	-1.9	0.0	-0.6	-0.5	0.4	-3.1	-0.3	-2.6
Stone	-6.7	-5.9	3.3	1.0	1.4	0.2	4.3	2.4	0.0	1.0	3.5	8.7
Metals	-1.8	-6.1	0.8	11.0	3.3	-7.5	1.6	3.5	-20.0	-1.0	-4.5	-5.6
Machinery	-6.2	18.2	39.9	-35.6	-0.2	4.4	-4.5	7.2	4.7	-6.0	-17.4	-51.4
Vehicles	-2.0	35.3	124.6	-4.5	-22.9	-10.3	-6.2	-14.2	-44.0	-4.5	133.7	-160.5
Electronics	-4.1	-4.3	-2.4	-6.5	-24.6	-3.7	-7.1	-2.3	-0.4	-2.4	-3.2	-2.9
Other	63.5	20.3	12.8	22.8	17.1	14.6	10.2	10.3	10.7	10.9	12.8	12.8
Total	216.1	240.4	280.3	-20.6	-93.8	-96.7	-291.0	-156.2	-290.8	-210.5	-36.5	-468.8

Difference between EU exports to NA reported by Eurostat and NA imports from EU reported by NSA (% of EU exp

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Agriculture	4%	-30%	-61%	-52%	-86%	-56%	-10%	-46%	-52%	-56%	-74%	-77%
Minerals	94%	75%	56%	12%	-12%	-33%	-116%	-67%	-107%	-77%	-29%	-42%
Chemicals	-1%	-11%	-23%	-70%	-122%	-128%	-164%	-206%	-217%	-299%	-327%	-290%
Textiles	5%	28%	10%	8%	-29%	1%	-22%	-11%	5%	-96%	-3%	-44%
Stone	-60%	-70%	41%	24%	28%	3%	60%	55%	0%	25%	51%	45%
Metals	-8%	-52%	6%	38%	17%	-63%	12%	20%	-77%	-7%	-30%	-55%
Machinery	-8%	21%	38%	-24%	0%	6%	-7%	11%	7%	-10%	-23%	-55%
Vehicles	-21%	34%	54%	-38%	-138%	-79%	-18%	-34%	-208%	-15%	84%	-475%
Electronics	-14%	-20%	-11%	-18%	-101%	-20%	-33%	-11%	-3%	-19%	-21%	-11%
Other	99%	96%	94%	96%	91%	94%	93%	89%	92%	96%	93%	91%
Total	46%	41%	41%	-4%	-27%	-29%	-66%	-41%	-77%	-59%	-7%	-83%

Source: Own calculations based on data provided by Namibia Statistics Agency and Eurostat COMEXT.

1.7.EU-South Africa trade

Trade between South Africa and the EU27 increased almost steadily since 2013, except for a drop in the covid-19-year 2020. Mostly, this is due to the steadily increasing EU27 imports from South Africa (Figure 19): These increased from €12.2 billion in 2013 to €29.2 billion in 2022 – initially still slowly (to €14.2 in 2016), but then more steeply since the EPA has been applied. In contrast, EU exports to South Africa remained largely flat during most of the period 2011 to 2022, at about €22 billion until 2019, then dropping in 2020 to €17.6 billion before recovering and reaching an all-time high in 2022, at €26.4 billion. Because of South Africa's more dynamic export development, the EU's bilateral trade balance consistently worsened, moving from a surplus of €9.4 billion in 2013 to a deficit of €0.1 billion in 2021 and €2.8 billion in 2022. Nevertheless, the 2022 development is largely owed to a steep increase in mineral fuel (HS chapter 27, mostly coal) imports from South Africa in that year; if mineral fuels trade is excluded, the bilateral trade balance in 2022 was indeed almost exactly balanced (after an EU deficit of €1.6 billion in 2021).

As for Mozambique, bilateral trade growth rates between the EU and South Africa are in line with the expectation that the EPA would encourage trade between the Parties (Figure 20): First, average trade between the EU and South Africa in the EPA period (2017-2022) was higher than in the preceding years (2013-2018) – although only slightly so for EU exports (2.2% higher than pre-EPA), compared to a substantial increase of 47.2% for EU imports from South Africa. Second, average annual growth rates of trade in both directions were higher in the years since the EPA started to be applied. In fact, both changed from contraction to growth: EU exports increased by 4.2% per year on average, compared to a decrease by 1.3% in the pre-EPA years, and EU imports from South Africa increased by 12.7% per year, compared to a decrease by 0.7% previously.

Figure 19: EU27-South Africa bilateral trade, 2011-2022 (€ billion)

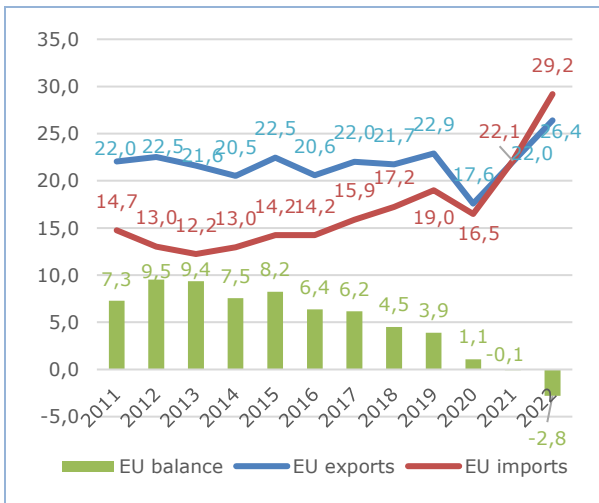
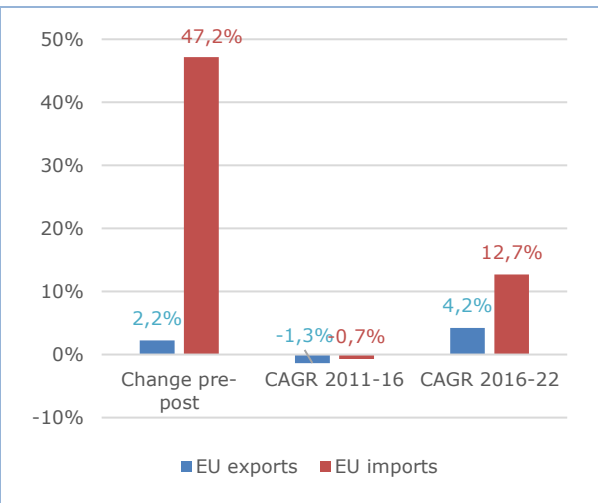


Figure 20: EU27-South Africa bilateral trade, growth rates before and after EPA start of application



Source: Own calculations based on Eurostat COMEXT data.

In sum, the development of trade between the EU and South Africa is in line with the expectation that the EPA would promote trade between the Parties. Despite the fact that the EPA improved market access in both directions only in a limited way compared to the previous TDCA, trade picked up, in particular for South Africa’s exports but to some extent also for EU exports, and previously sluggish trade growth was revitalised.

Robustness check: comparison of Eurostat and South African official trade data

This analysis remains to be done based on South Africa’s official trade statistics obtained from SARS.

2. EVOLUTION OF BILATERAL TRADE IN GOODS BETWEEN THE EU AND SADC EPA STATES BY SECTOR

Going beyond the review of total bilateral trade between the Parties, this section reviews (again, based on Eurostat COMEXT data) bilateral trade trends over time by broad sectors.³ More detailed analysis of trends for selected important products is provided in section 4.

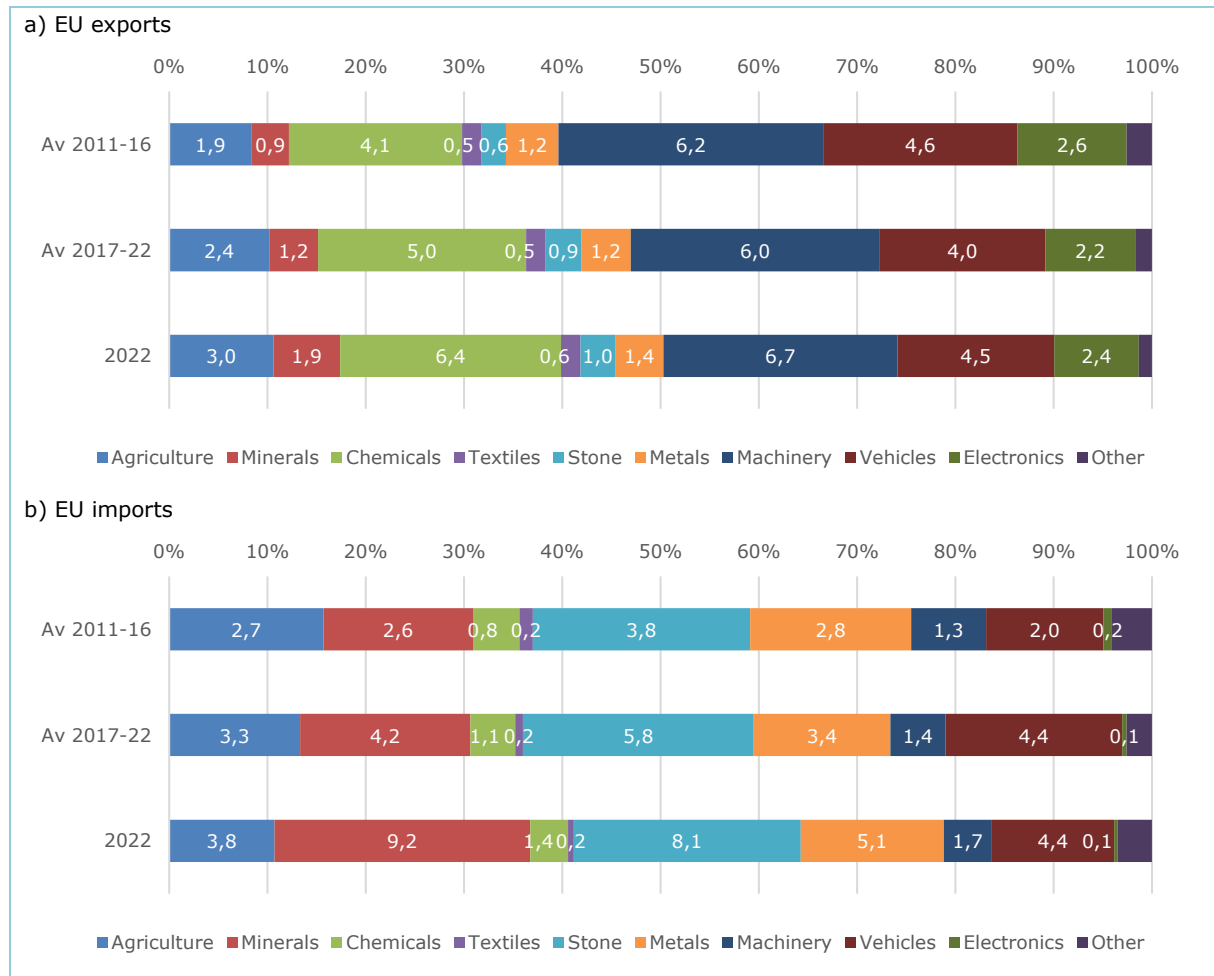
³ For this initial review of bilateral trade statistics, broad sectors as defined in Harvard’s Atlas of Economic Complexity (<https://atlas.cid.harvard.edu/>) at the “1-digit level” are used; this distinguishes ten sectors, agriculture, minerals, chemicals, textiles, stone, metals, machinery, electronics, vehicles, and others. Table 28 in the Annex provide the correspondence between HS chapters and broad sectors.

2.1. EU-SADC EPA State trade

By broad sector, machinery, chemicals and vehicles account for the largest **EU exports to the SADC EPA States** – both before the EPA started to be applied and since then (Figure 21a). Exports of machinery were ranked first both in the years preceding the EPA and since then, although they decreased from €6.2 billion per year (2011-2016) to €6.0 billion since then (2017-2022) – most a result of a sharp decline in the COVID-19 years 2020 and 2021 (Table 6); their share in total EU exports to the partner countries decreased from 26.9% to 25.4%. Vehicle exports, ranked second in the pre-EPA years, decreased from €4.6 billion to €4.0 billion and were overtaken by chemicals, whose exports increased from €4.1 billion per year before to €5.0 billion since the EPA; in 2021 and 2022, chemicals exports almost reached those of machinery. Agriculture and electronics constitute a second tier of exports, with values of slightly above €2 billion, followed with some distance by metals, minerals, stone, and textiles. Comparing the average performance in the years 2017 to 2022 with the pre-EPA period, exports of about half of the sectors grew by up to 50% (stone), but electronics (-15.4%), vehicles (-12.6%), metals (-3.5%), and machinery (-3.4%) decreased (Table 6). However, much of this decrease is owed to declines in the earlier years, and in fact annual growth from 2016 to 2022 exceeded the performance in the years up to 2016 for virtually all sectors, and all EU sectors except vehicles exported more to the SADC EPA States in 2022 than in 2019 before COVID-19.

EU imports from the SADC EPA States are led by five broad sectors: stone (mostly precious minerals), vehicles, minerals, metals, and agriculture (ordered by average export value over the period 2017 to 2022), all of which saw substantial increases in value when comparing performance in the five years leading up to the start of application of the EPA with the five years thereafter (Figure 21b). Machinery and chemicals also constitute sizable sectors with a stable performance over the years, whereas imports of textiles and electronics are comparatively modest. These last two sectors are also the only ones for which average imports in the period 2017 to 2022 were lower than in the years leading up to 2016 (Table 6); all others saw mostly rapid increases of up to 115% (vehicles). Other sectors that expanded more than the average of 43% are minerals and stone. At the same time, the growth in vehicles imports stalled in more recent years: whereas the average annual growth rate in the years 2011 to 2016 was 18.4%, this decreased to 3.2% in the years 2017 to 2022, and the sector was the only one for which imports in 2022 were still below those in 2018 and 2019.

Figure 21: EU27-SADC EPA States trade by broad sector, before and since EPA (€ billion)



Source: Own calculations based on Eurostat COMEXT data.

Table 6: EU27- SADC EPA States trade by broad sector, 2011-2022 (€ billion)

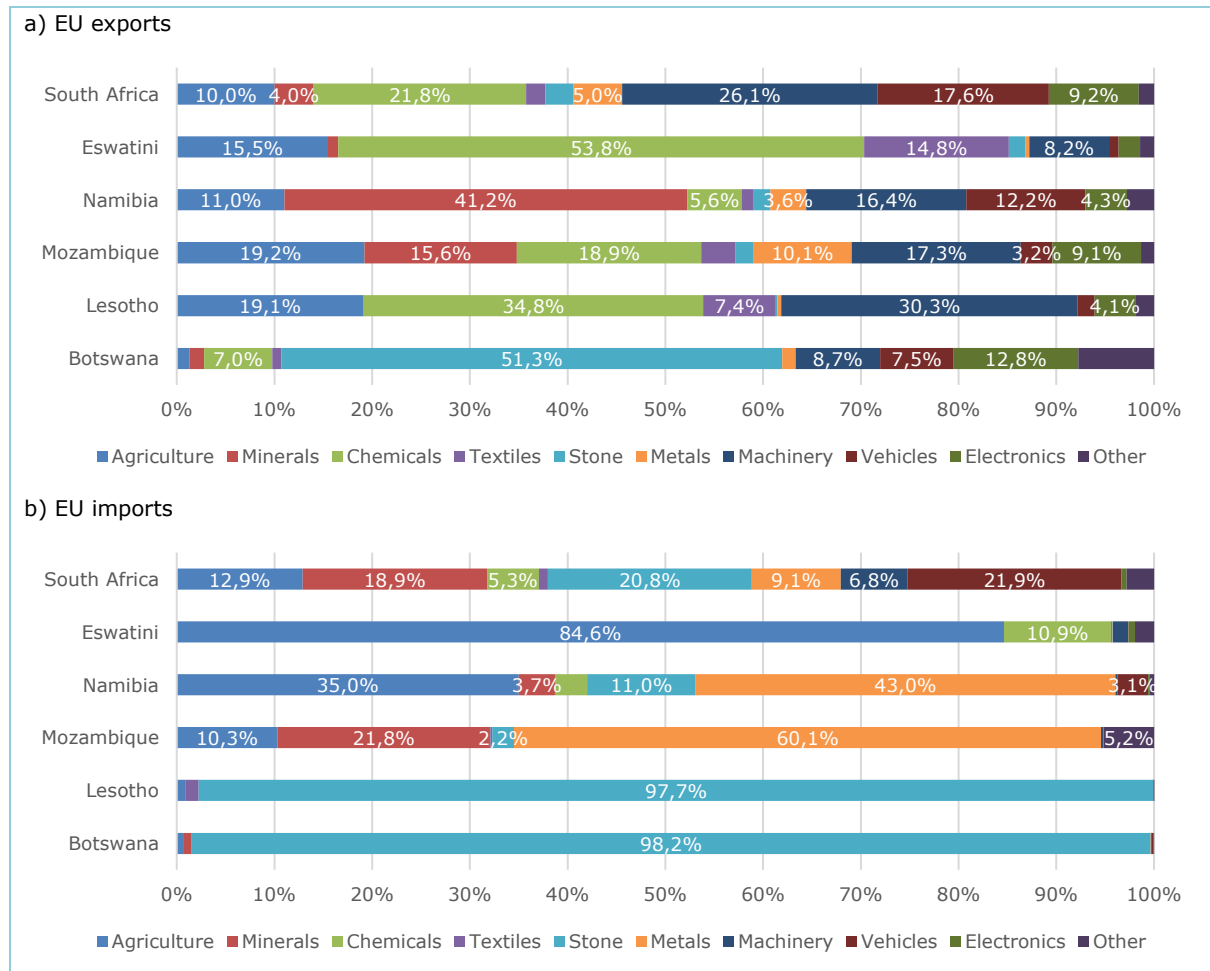
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022		Av 2011-16	Av 2017-22		Change pre-post	CAGR 2011-16	CAGR 2016-22
EXPORT	23.2	24.0	23.3	22.2	24.0	21.9	23.3	23.1	24.4	19.1	24.0	28.3		23.1	23.7		2.6%	-1.1%	4.3%
Agriculture	1.7	1.9	1.9	1.9	2.1	2.1	2.2	2.2	2.5	2.2	2.4	3.0		1.9	2.4		24.7%	4.6%	6.0%
Minerals	1.1	1.2	1.0	0.7	0.7	0.6	1.0	1.1	0.8	0.8	1.3	1.9		0.9	1.2		33.8%	-12.9%	22.8%
Chemicals	3.8	4.1	3.9	4.1	4.5	4.0	4.4	4.6	4.8	4.3	5.6	6.4		4.1	5.0		23.2%	1.2%	7.8%
Textiles	0.4	0.4	0.4	0.5	0.5	0.5	0.5	0.5	0.5	0.4	0.5	0.6		0.5	0.5		3.8%	3.3%	2.7%
Stone	0.5	0.5	0.6	0.6	0.6	0.7	0.6	0.7	0.7	0.9	1.2	1.0		0.6	0.9		49.2%	7.5%	6.6%
Metals	1.3	1.3	1.3	1.2	1.3	1.1	1.2	1.2	1.2	0.9	1.3	1.4		1.2	1.2		-3.5%	-3.1%	4.3%
Machinery	6.4	6.5	6.3	6.0	6.3	5.9	6.2	6.1	6.5	4.8	5.7	6.7		6.2	6.0		-3.4%	-1.4%	2.2%
Vehicles	4.5	4.5	4.6	4.5	5.0	4.3	4.6	4.1	4.6	2.7	3.5	4.5		4.6	4.0		-12.6%	-0.7%	0.8%
Electronics	2.8	2.8	2.8	2.2	2.6	2.2	2.2	2.3	2.4	1.8	2.0	2.4		2.6	2.2		-15.4%	-4.4%	1.5%
Other	0.9	0.7	0.5	0.5	0.5	0.5	0.4	0.4	0.4	0.3	0.4	0.4		0.6	0.4		-32.3%	-9.8%	-5.2%
IMPORT	17.4	15.7	15.3	17.3	18.4	18.9	20.4	21.9	23.1	20.2	26.4	35.2		17.2	24.5		42.8%	1.6%	10.9%
Agriculture	2.5	2.5	2.7	2.6	2.9	2.9	3.0	3.2	3.2	3.1	3.3	3.8		2.7	3.3		21.3%	3.2%	4.4%
Minerals	3.3	2.7	2.3	2.9	2.4	2.0	2.5	2.5	3.1	2.9	5.3	9.2		2.6	4.2		62.6%	-9.9%	29.3%
Chemicals	0.8	0.9	0.8	0.8	0.8	0.8	0.9	1.0	1.1	1.0	1.3	1.4		0.8	1.1		37.2%	-1.0%	10.3%
Textiles	0.4	0.3	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2		0.2	0.2		-17.2%	-11.5%	0.8%
Stone	3.1	2.8	3.1	4.5	4.4	4.9	4.4	5.0	4.8	5.1	7.2	8.1		3.8	5.8		51.7%	9.5%	8.9%
Metals	3.3	2.8	2.8	2.7	2.8	2.6	3.3	3.4	3.0	2.5	3.0	5.1		2.8	3.4		21.0%	-4.7%	12.2%
Machinery	1.7	1.4	1.2	1.2	1.2	1.1	1.1	1.2	1.3	1.3	1.7	1.7		1.3	1.4		5.1%	-8.2%	7.5%
Vehicles	1.6	1.3	1.1	1.8	2.9	3.6	3.9	4.8	6.0	3.7	3.7	4.4		2.0	4.4		115.3%	18.4%	3.2%
Electronics	0.2	0.1	0.1	0.1	0.2	0.1	0.1	0.1	0.1	0.1	0.1	0.1		0.2	0.1		-26.0%	-14.0%	3.0%
Other	0.6	0.9	0.8	0.5	0.6	0.8	0.9	0.5	0.2	0.3	0.6	1.2		0.7	0.6		-10.0%	3.5%	8.2%
TRADE BALANCE EU	5.8	8.2	7.9	4.8	5.6	3.1	2.9	1.2	1.3	-1.0	-2.4	-6.9		5.9	-0.8				
Agriculture	-0.8	-0.6	-0.9	-0.7	-0.8	-0.8	-0.8	-1.0	-0.7	-0.9	-0.9	-0.8		-0.8	-0.8				
Minerals	-2.2	-1.5	-1.4	-2.2	-1.7	-1.4	-1.6	-1.3	-2.3	-2.1	-3.9	-7.2		-1.7	-3.1				
Chemicals	3.0	3.2	3.1	3.3	3.6	3.3	3.5	3.6	3.7	3.3	4.3	5.0		3.3	3.9				
Textiles	0.0	0.2	0.2	0.3	0.3	0.3	0.3	0.3	0.3	0.2	0.3	0.4		0.2	0.3				
Stone	-2.6	-2.4	-2.6	-3.8	-3.8	-4.2	-3.8	-4.3	-4.1	-4.1	-5.9	-7.1		-3.2	-4.9				
Metals	-2.0	-1.4	-1.5	-1.5	-1.5	-1.5	-2.1	-2.3	-1.8	-1.6	-1.7	-3.7		-1.6	-2.2				
Machinery	4.6	5.1	5.1	4.9	5.0	4.8	5.1	4.9	5.3	3.6	4.0	5.0		4.9	4.6				
Vehicles	2.9	3.2	3.5	2.7	2.1	0.7	0.7	-0.7	-1.4	-1.0	-0.2	0.1		2.5	-0.4				
Electronics	2.6	2.7	2.6	2.0	2.4	2.1	2.1	2.1	2.2	1.7	1.9	2.3		2.4	2.1				
Other	0.6	-0.2	-0.3	0.0	-0.1	-0.2	-0.5	-0.1	0.2	0.0	-0.2	-0.8		0.0	-0.2				

Source: Own calculations based on Eurostat COMEXT data.

Comparing EU exports and imports by broad sector shows that the EU’s comparative advantages as revealed by the **sectoral trade balances** have been fairly stable over the years, for most sectors (Table 6): persistent sectoral deficits were registered in stone, minerals, metals, and agriculture, and in all cases except agriculture the average size of the deficit was higher in the EPA period than before. Consistent EU surpluses were in machinery, chemicals, electronics, and textiles. For vehicles, a substantial surplus in the years up to 2017 turned into a deficit from 2018 to 2021 and an almost balanced trade in 2022.

It should be noted that this aggregated overview of sectoral trade between the Parties is to a large extent reflects the structure of EU-South Africa trade, due to the latter’s economic dominant size among the partners, and hides **significant differences across the bilateral trade relationships between the EU and individual partners**. This is illustrated in Figure 22, which e.g. shows that EU chemicals exports accounted for between 7.0% (to Botswana) and 53.8% (to Eswatini) of the EU’s total exports to the partner country in the years since the EPA started to be applied. Import patterns (Figure 22b) vary even stronger. The sections that follow provide a summary of sectoral trade patterns for each of the six bilateral trade relationships covered by the EPA.

Figure 22: EU27-SADC EPA States trade by broad sector, annual averages by partner country for EPA period* (% of total bilateral exports/imports)



* 2019-2022 for trade with Mozambique, 2017 to 2022 for all other partners.
Source: Own calculations based on Eurostat COMEXT data.

Statistics at the HS chapter level add limited information to the broad sectoral analysis, except clarifying the composition of some of the broad sectors. Regarding EU exports, the broad machinery sector exports are constituted by about four fifths machinery and

mechanical appliances and one fifth optical and other equipment. Likewise, the important role of pharmaceuticals within the chemicals sector is shown, followed by plastics, and other chemicals products (Figure 23). Also, it shows that exports of the three leading sectors decreased when comparing the EPA period with the pre-EPA period, whereas other important sectors saw export increases. With respect to EU imports, the relatively weak performance of machinery and mechanical equipment (HS 84) as well as iron and steel (HS 72) in comparison to stronger growth of other sectors' imports is noteworthy (Figure 24).

Figure 23: EU27 exports to SADC EPA States – main sectors (HS chapter) before and since the EPA (€ million)

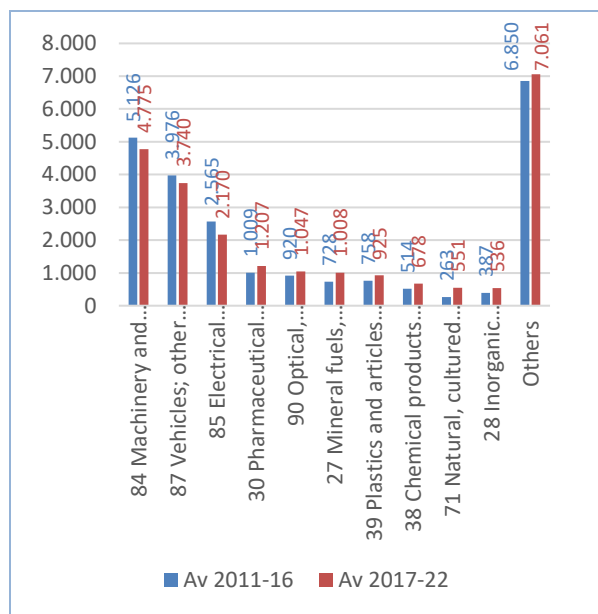
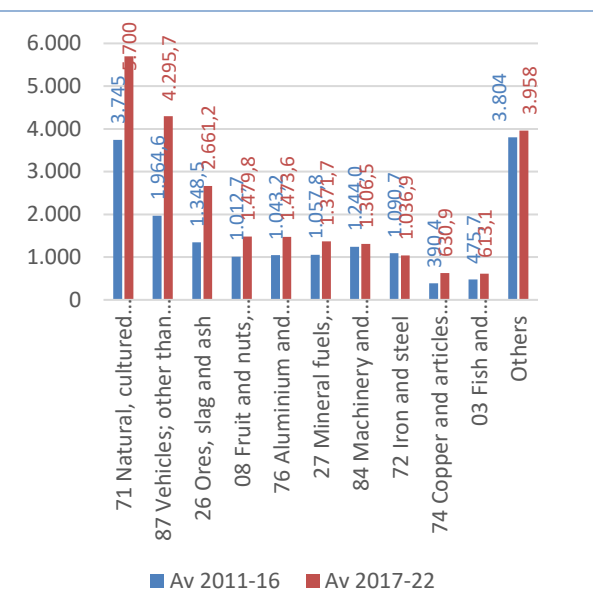


Figure 24: EU27 imports from SADC EPA States – main sectors (HS chapter) before and since the EPA (€ million)

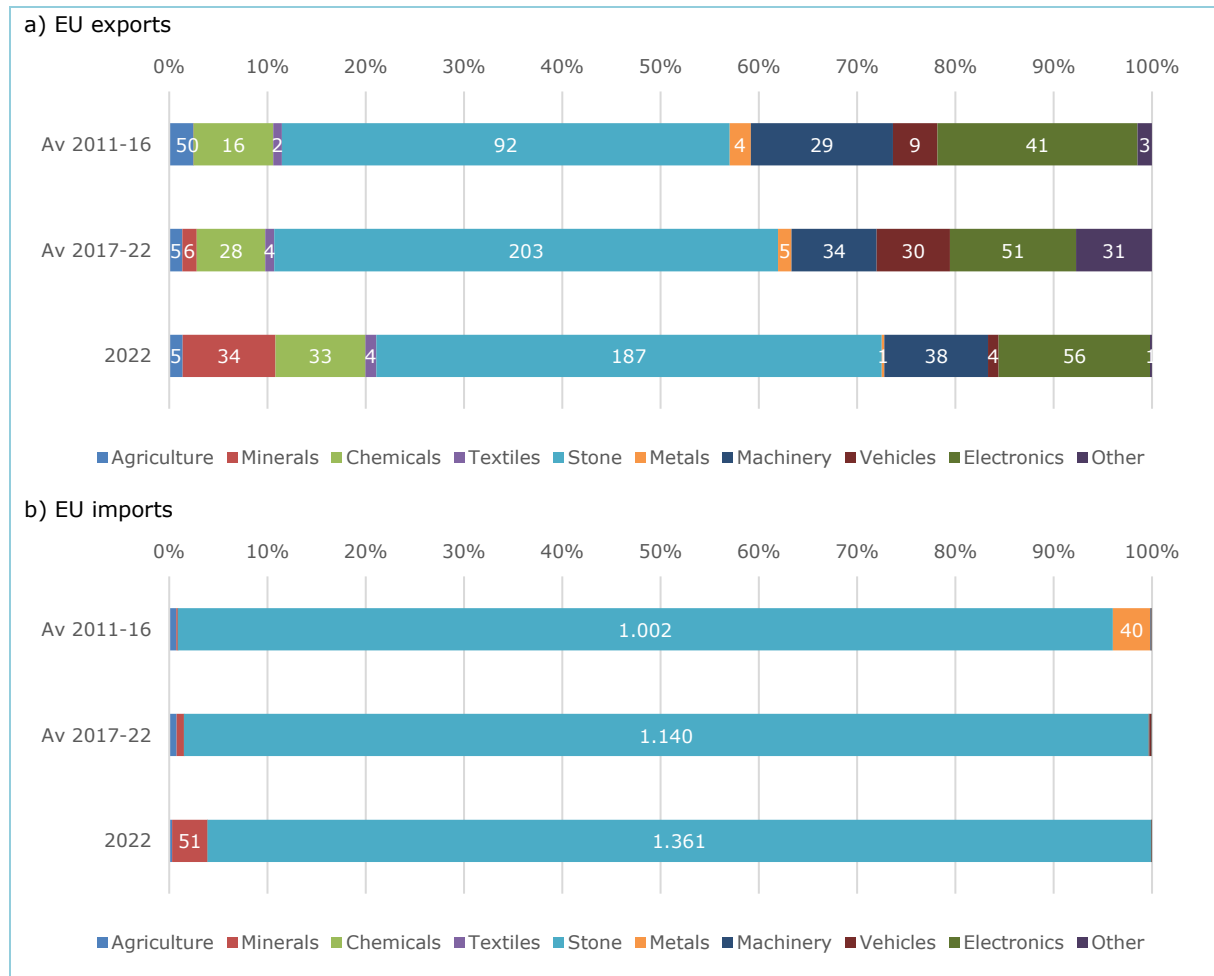


Source: Own calculations based on Eurostat COMEXT data.

2.2. EU-Botswana trade

EU exports to Botswana are led by stone (mostly diamonds), followed by electronics and machinery (Figure 25a). Over time, the composition has been relatively stable, and exports of all sectors (except agriculture and metals) have increased since the start of application of the EPA. Conversely, **Botswana's exports to the EU** almost entirely consist of stones (diamonds) (Figure 25b). The only other sector that consistently exports to the EU at a value of €1 million or more is agriculture, although export values fluctuate strongly across years, ranging from €1 million (in 2021) to €21 million (in 2019) (Table 7). Metals (mostly nickel) were exported to the EU up to 2016 but since ceased due to the closure of the mine.

Figure 25: EU27-Botswana bilateral trade by broad sector, before and since EPA (€ million)



Source: Own calculations based on Eurostat COMEXT data.

Table 7: EU27-Botswana bilateral trade by broad sector, 2011-2022 (€ million)

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022		Av 2011-16	Av 2017-22		Change pre-post	CAGR 2011-16	CAGR 2016-22
EXPORT	125	144	179	241	247	271	234	291	407	447	633	363		201	396		96.7%	16.8%	5.0%
Agriculture	5	6	6	5	5	4	5	4	4	3	10	5		5	5		5.8%	-5.0%	4.7%
Minerals	0	0	0	0	0	0	0	0	0	0	0	34		0	6		46718.3%	-25.0%	465.3%
Chemicals	16	10	15	17	20	21	26	17	18	17	54	33		16	28		70.0%	5.5%	8.4%
Textiles	1	2	2	2	2	3	4	6	4	2	3	4		2	4		104.9%	26.8%	4.4%
Stone	33	48	94	137	115	123	101	62	96	329	443	187		92	203		121.2%	29.8%	7.2%
Metals	3	2	1	2	13	4	3	2	22	4	1	1		4	5		25.7%	4.7%	-22.5%
Machinery	24	33	27	28	31	31	33	33	47	25	30	38		29	34		17.8%	4.9%	3.9%
Vehicles	6	9	2	4	11	23	4	46	77	26	20	4		9	30		223.1%	31.0%	-25.2%
Electronics	36	35	28	45	50	53	54	50	65	36	43	56		41	51		23.9%	8.1%	1.0%
Other	1	2	2	2	1	10	4	71	74	5	30	1		3	31		929.3%	66.2%	-36.1%
IMPORT	150	227	613	1,793	1,475	2,063	1,334	1,248	912	980	1,078	1,418		1,053	1,162		10.3%	68.9%	-6.1%
Agriculture	2	2	5	6	16	16	9	13	21	3	1	4		8	9		13.7%	57.4%	-19.9%
Minerals	0	0	0	9	0	0	0	0	0	0	0	51		2	9		448.0%	48.5%	450.0%
Chemicals	0	0	0	0	0	0	0	0	0	0	0	0		0	0		-30.8%	-39.8%	19.8%
Textiles	0	0	0	0	0	0	0	0	0	0	0	0		0	0		-10.5%	-25.7%	-5.1%
Stone	147	222	593	1,711	1,421	1,920	1,324	1,220	890	975	1,073	1,361		1,002	1,140		13.8%	67.2%	-5.6%
Metals	0	0	14	65	35	125	0	0	0	0	1	0		40	0		-99.7%	745.0%	-69.0%
Machinery	0	0	0	1	2	0	1	0	0	0	1	0		1	1		-8.8%	5.9%	-7.1%
Vehicles	0	1	0	0	0	0	0	12	0	0	0	0		0	2		749.8%	6.0%	-16.6%
Electronics	0	1	0	1	0	0	0	0	0	0	1	1		1	0		-17.5%	-6.4%	17.4%
Other	0	0	0	0	0	0	0	1	0	1	0	0		0	1		71.8%	-2.6%	2.1%
TRADE BALANCE EU	-25	-82	-435	-1,551	-1,228	-1,791	-1,099	-957	-505	-534	-444	-1,055		-852	-766				
Agriculture	3	4	1	-1	-11	-12	-3	-9	-17	-1	9	1		-3	-3				
Minerals	0	0	0	-9	0	0	0	0	0	0	0	-17		-2	-3				
Chemicals	16	9	15	17	20	21	26	17	18	17	54	33		16	28				
Textiles	1	1	2	2	2	3	4	6	4	2	3	4		2	4				
Stone	-113	-175	-499	-1,574	-1,306	-1,796	-1,222	-1,158	-794	-646	-630	-1,174		-911	-938				
Metals	3	2	-13	-63	-22	-121	3	2	22	4	0	1		-36	5				
Machinery	24	33	27	28	30	30	32	32	46	25	29	38		28	34				
Vehicles	6	8	2	4	11	22	4	33	77	26	20	4		9	27				
Electronics	35	33	28	44	49	52	54	50	65	36	42	55		40	50				
Other	0	1	2	2	1	10	3	70	73	3	30	0		3	30				

Source: Own calculations based on Eurostat COMEXT data.

A review of trade at a slightly more granular (HS chapter) level confirms the concentration on diamonds of both EU exports and imports are shown to be quite diversified, considering the small size of the market. Other notable EU exports are electrical machinery (€51 million on average per year since 2017), vehicles (€21 million), machinery (€20 million) and pharmaceutical (€18 million). All of the leading sectors except machinery also increased their exports since the EPA has started to be applied (Figure 26). EU imports from Botswana apart from diamonds mostly consist of meat (Figure 27), with mineral fuels and ores being one-off imports in 2022.

Figure 26: EU27 exports to Botswana – main sectors (HS chapter) before and since the EPA (€ million)

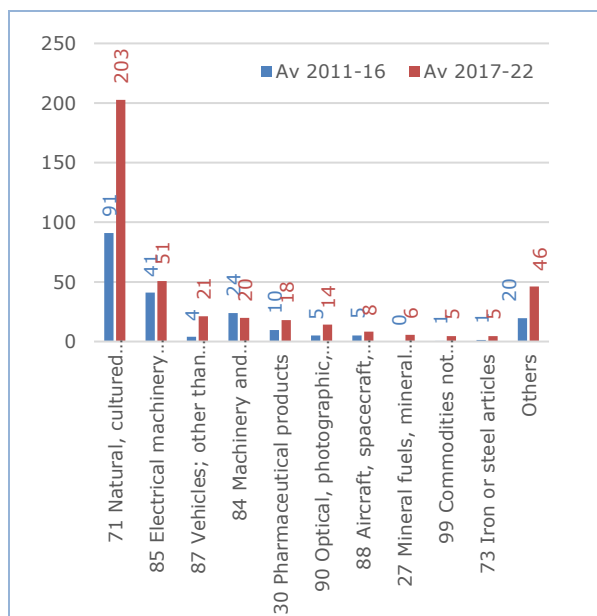
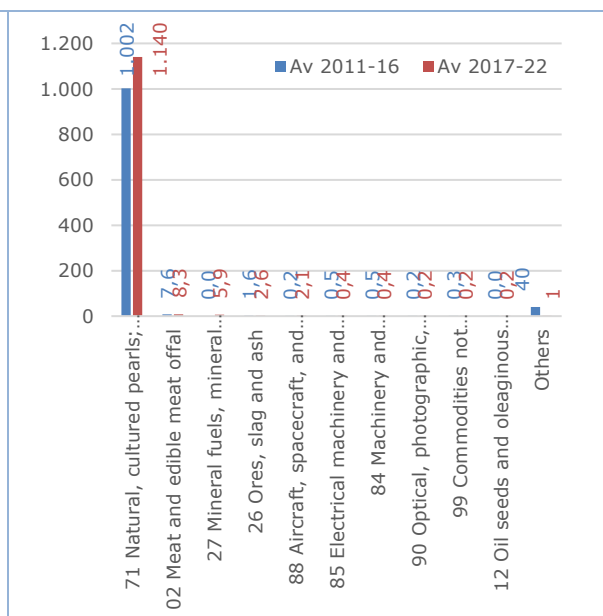


Figure 27: EU27 imports from Botswana – main sectors (HS chapter) before and since the EPA (€ million)



Source: Own calculations based on Eurostat COMEXT data.

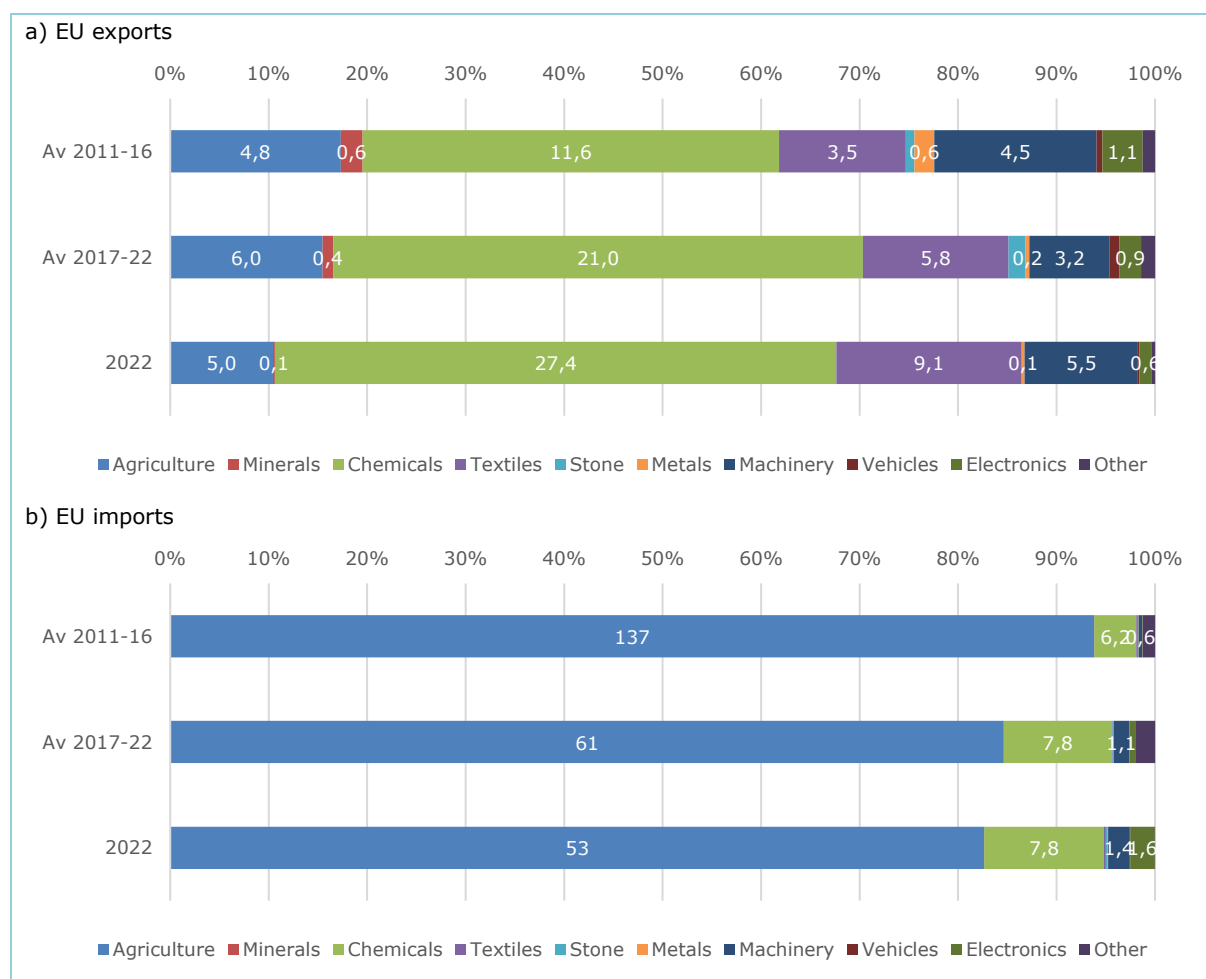
More details on key products traded between the EU and Botswana are presented in section 4.1.

2.3. EU-Eswatini trade

EU exports to Eswatini are led by chemicals, followed by textiles; both of these sectors almost doubled exports since the start of application of the EPA (Figure 28a). Exports of other sector mostly stagnated (e.g., agricultural products, machinery) or declined (e.g. minerals, electronics).

Eswatini's exports to the EU are dominated by agriculture (more than 80%), followed by chemicals (Figure 28b). However, agricultural exports (notably sugar) have lost more than half of their value since the EPA started to be applied: average annual exports in the period 2017 to 2022 were €61 million, compared to €137 million in the five years preceding the EPA. In contrast, exports of machinery and electronics picked up in recent years (Table 8).

Figure 28: EU27-Eswatini bilateral trade by broad sector, before and since EPA (€ million)



Source: Own calculations based on Eurostat COMEXT data.

At a slightly more granular level (HS chapter), EU exports are shown to be quite diversified, considering the small size of the market. The most important export sectors in the EPA period were essential oils (€8.8 million on average per year), furniture (€5.4 million) and organic chemicals (€4.7 million). Most of the leading sectors except machinery (from €3.7 million to €2.1 million) also increased their exports since the EPA has started to be applied (Figure 29).

Table 8: EU27-Eswatini bilateral trade by broad sector, 2011-2022 (€ million)

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022		Av 2011-16	Av 2017-22		Change pre-post	CAGR 2011-16	CAGR 2016-22
EXPORT	21	20	20	26	31	47	46	43	36	27	35	48		28	39		42.0%	17.2%	0.3%
Agriculture	5.2	3.5	4.3	5.0	6.0	4.6	9.9	8.8	4.9	3.5	4.1	5.0		4.8	6.0		26.8%	-2.6%	1.6%
Minerals	0.7	1.1	0.6	0.5	0.4	0.2	0.4	0.4	0.5	0.9	0.2	0.1		0.6	0.4		-31.2%	-19.2%	-14.0%
Chemicals	9.0	8.7	5.7	10.8	13.0	22.6	25.1	20.5	13.8	16.5	22.8	27.4		11.6	21.0		80.7%	20.2%	3.3%
Textiles	0.4	0.5	1.7	1.5	4.5	12.6	5.7	6.9	9.9	0.8	2.3	9.1		3.5	5.8		63.2%	95.1%	-5.4%
Stone	0.0	0.0	0.0	0.4	0.7	0.3	1.0	1.6	0.4	1.1	0.0	0.0		0.2	0.7		178.4%	84.8%	-61.8%
Metals	0.3	0.2	0.5	0.6	0.1	1.7	0.2	0.1	0.2	0.2	0.2	0.1		0.6	0.2		-72.5%	44.7%	-33.1%
Machinery	3.9	3.6	5.4	5.1	5.2	4.0	2.5	2.7	4.1	1.6	2.7	5.5		4.5	3.2		-29.7%	0.4%	5.4%
Vehicles	0.2	0.3	0.0	0.1	0.1	0.2	0.0	0.2	0.5	0.2	1.3	0.1		0.2	0.4		131.4%	2.9%	-17.2%
Electronics	1.3	1.6	1.1	1.5	0.5	0.8	0.4	1.4	1.3	0.4	1.0	0.6		1.1	0.9		-23.5%	-8.7%	-5.3%
Other	0.4	0.2	0.5	0.3	0.3	0.4	0.4	0.3	0.6	1.5	0.4	0.2		0.3	0.6		63.6%	-2.6%	-10.8%
IMPORT	152	164	219	127	124	89	78	47	113	56	71	64		146	72		-51.0%	-10.1%	-5.4%
Agriculture	144	157	207	120	113	81	61	40	106	44	60	53		137	61		-55.8%	-10.9%	-6.8%
Minerals	0.0	0.0		0.0	0.0	0.0					0.0	0.0		0.0	0.0		193.7%	-11.5%	57.5%
Chemicals	6.6	6.2	5.4	6.6	5.9	6.7	11.5	6.6	6.0	5.7	9.4	7.8		6.2	7.8		25.7%	0.2%	2.6%
Textiles	0.4	0.3	0.2	0.3	0.1	0.0	0.0	0.0	0.0	0.1	0.1	0.1		0.2	0.1		-71.2%	-38.2%	21.3%
Stone	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1		0.0	0.1		20.1%	-0.8%	28.1%
Metals	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0		-29.9%	-13.8%	3.1%
Machinery	0.5	0.4	0.4	0.4	0.6	1.3	2.4	0.4	0.9	0.7	1.1	1.4		0.6	1.1		89.2%	22.6%	1.0%
Vehicles		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1		0.0	0.0		79.1%	..	8.0%
Electronics	0.1	0.1	0.1	0.0	0.1	0.1	0.1	0.0	0.6	0.1	0.2	1.6		0.1	0.5		609.9%	3.5%	72.7%
Other	0.1	0.1	5.7	0.0	4.8	0.0	2.6	0.0	0.0	5.7	0.0	0.0		1.8	1.4		-21.7%	-47.4%	30.1%
TRADE BALANCE EU	-130	-145	-199	-102	-93	-42	-32	-4	-77	-29	-37	-16		-118	-32				
Agriculture	-139	-153	-202	-115	-107	-77	-51	-31	-101	-40	-56	-48		-132	-55				
Minerals	0.7	1.1	0.6	0.5	0.4	0.2	0.4	0.4	0.5	0.9	0.2	0.1		0.6	0.4				
Chemicals	2.4	2.5	0.3	4.2	7.2	15.9	13.6	13.9	7.8	10.8	13.4	19.6		5.4	13.2				
Textiles	0.0	0.2	1.5	1.2	4.4	12.6	5.7	6.9	9.8	0.8	2.2	8.9		3.3	5.7				
Stone	0.0	-0.1	-0.1	0.4	0.7	0.2	1.0	1.5	0.3	1.0	0.0	-0.1		0.2	0.6				
Metals	0.2	0.2	0.5	0.6	0.0	1.7	0.1	0.1	0.1	0.1	0.1	0.1		0.5	0.1				
Machinery	3.5	3.1	4.9	4.7	4.6	2.7	0.1	2.3	3.2	0.9	1.6	4.2		3.9	2.0				
Vehicles	0.2	0.3	0.0	0.0	0.1	0.2	0.0	0.2	0.5	0.2	1.2	0.0		0.2	0.4				
Electronics	1.2	1.5	1.1	1.5	0.4	0.7	0.3	1.3	0.7	0.3	0.8	-1.0		1.1	0.4				
Other	0.1	0.1	-5.2	0.2	-4.5	0.4	-2.3	0.3	0.6	-4.1	0.3	0.2		-1.5	-0.8				

Source: Own calculations based on Eurostat COMEXT data.

EU imports from Eswatini continue to be dominated by sugar, although the value has drastically decreased from €120 million per year in the five years preceding the EPA to €48 million since (Figure 30). The only other sectors with import values exceeding €1 million per year are beverages, essential oils, fruit and nuts, vegetable and fruit preparations, and chemical products; among these, beverages, essential oils and chemicals increased in value, albeit only slightly so.

Figure 29: EU27 exports to Eswatini – main sectors (HS chapter) before and since the EPA (€ million)

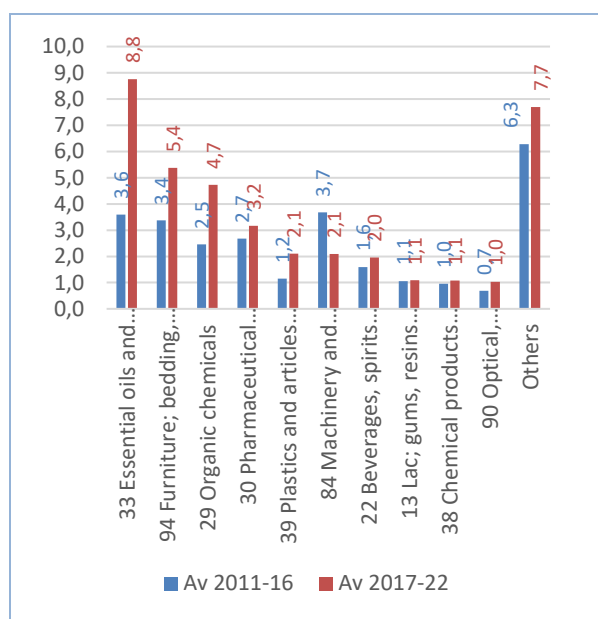
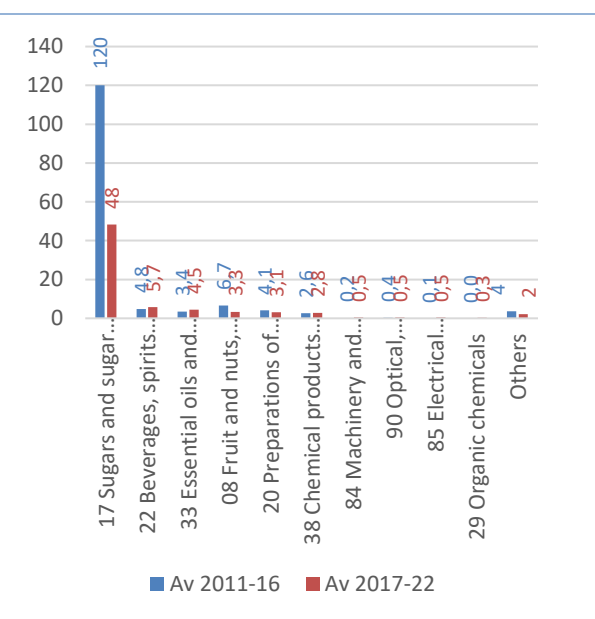


Figure 30: EU27 imports from Eswatini – main sectors (HS chapter) before and since the EPA (€ million)



Source: Own calculations based on Eurostat COMEXT data.

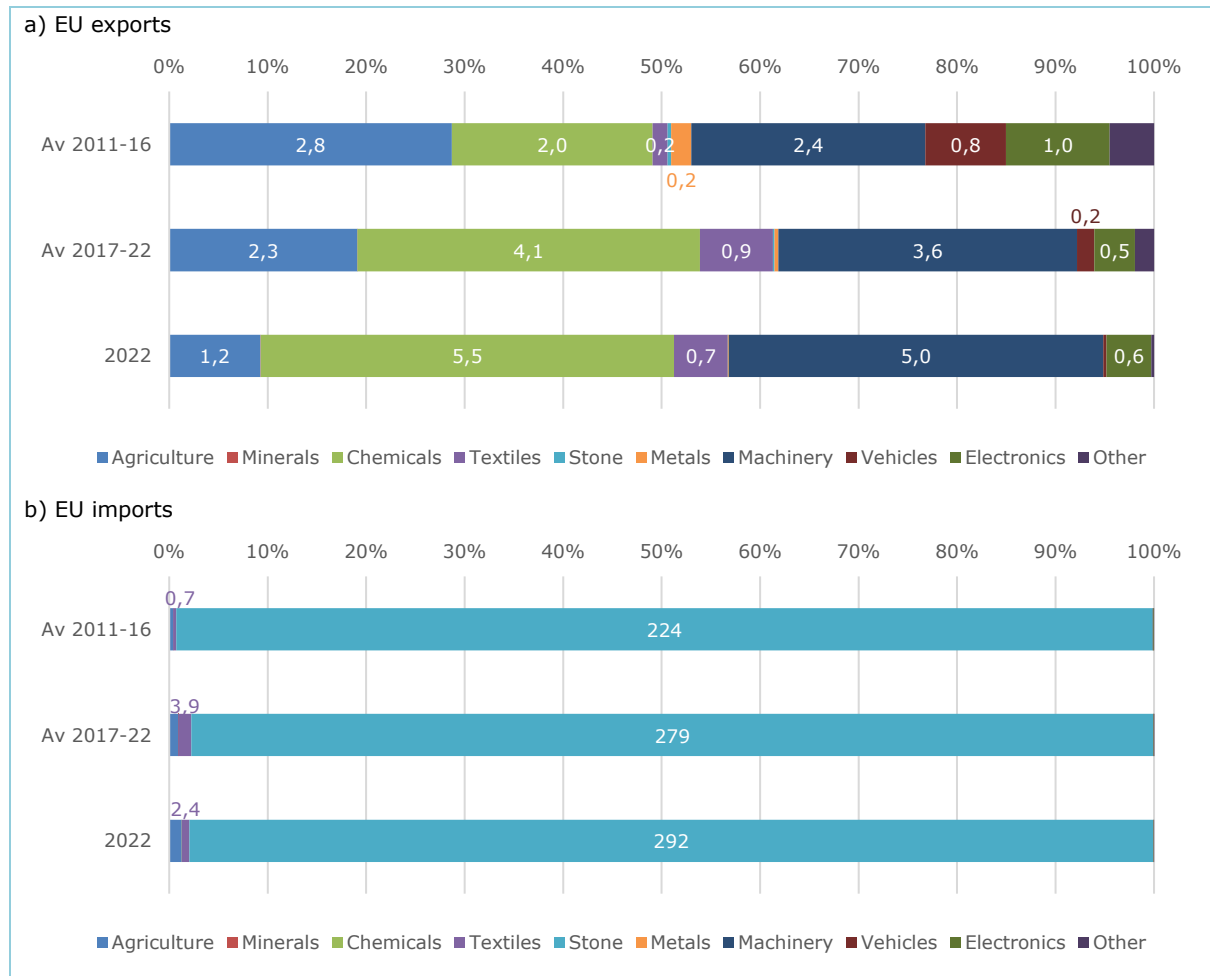
More details on key products traded between the EU and Eswatini are presented in section 4.2.

2.4. EU-Lesotho trade

EU exports to Lesotho continue to be small, as discussed above. They are led by chemicals and machinery. Both of the two leading sectors about doubled export values since the start of application of the EPA and increased their share in total EU exports to Lesotho to more than 80% (Figure 31a); textiles exports also increased considerably. Exports of other sectors mostly decreased, including those of agricultural products, which used to be the leading export sector in the five years preceding the EPA but only in third position since 2017 (Table 9).

Lesotho's exports to the EU consist almost entirely of "stone", i.e. diamonds, followed by some agricultural and textiles exports (Figure 31b). On a positive note, the combined share of agricultural and textile exports has increased slightly since the EPA started to be applied, from 0.7% in the total (average for 2011 to 2016) to 2.3% of the total (average in the period 2017 to 2022). However, the performance of the two sectors varied considerably: whereas agricultural exports to the EU consistently increased, from zero in 2011 to €1.8 million in 2016, and €3.7 million in 2022, textile exports were very low and stagnating until 2016, then increased rapidly to €7.1 million in 2020, and then dropped again to €2.4 million in 2022 (Table 9).

Figure 31: EU27-Lesotho bilateral trade by broad sector, before and since EPA (€ million)



Source: Own calculations based on Eurostat COMEXT data.

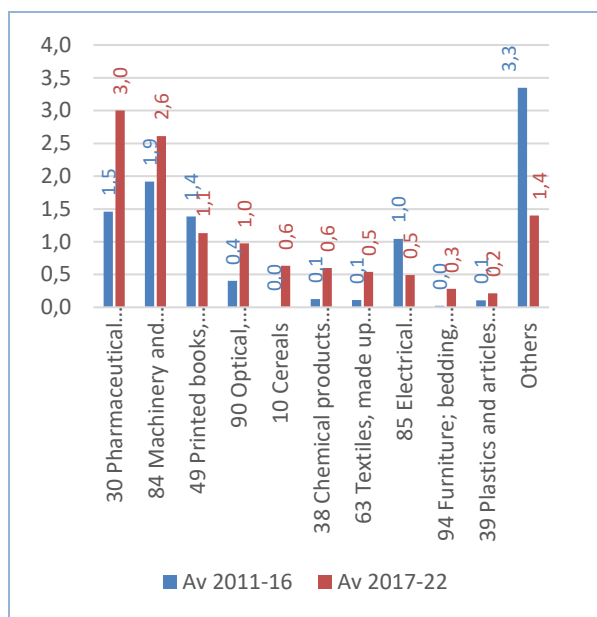
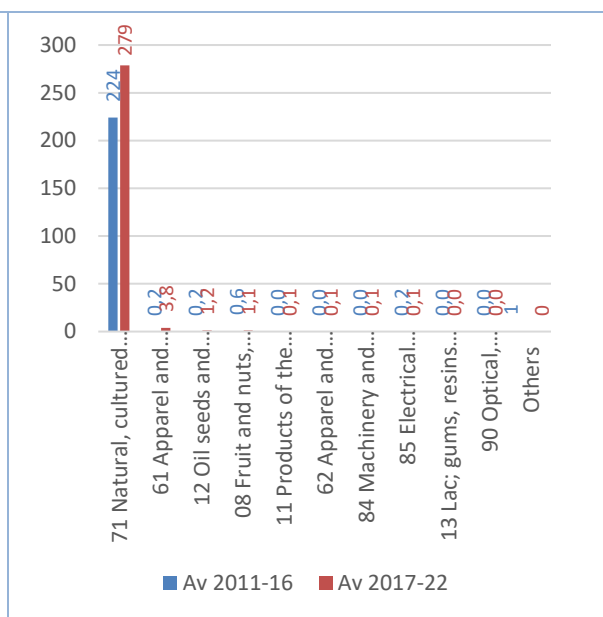
At a slightly more granular level (HS chapter), EU exports are shown to be more diversified, considering the small size of Lesotho as an export market – although with a tendency towards more concentration. The most important export sectors in the EPA period were pharmaceuticals (€3.0 million on average per year) and machinery and mechanical appliances (€2.6 million). Most of the leading sectors except printed books and electrical machinery also increased their exports since the EPA started to be applied (Figure 32). On the other hand, exports of cereal products (HS chapters 11 and 19) all but disappeared, from an annual average of €1.1 million in the pre-EPA years, which was countered by an increase in cereals exports (from zero to €0.6 million).

EU imports from Lesotho continue to be dominated by precious metals (i.e., diamonds) which increased from an average €224 million to €279 million (Figure 33), and €292 million in 2022. But three other sectors managed to increase annual exports to an average value of €1 million and more since the EPA’s start of application: garments (€3.8 million), oil seeds (€1.2 million) and fruit and nuts (€1.0 million); their combined share in Lesotho’s overall exports to the EU remain however below 3%, and exports of garments and fruit and nuts have been on a downward trend again in the most recent years.

Table 9: EU27-Lesotho bilateral trade by broad sector, 2011-2022 (€ million)

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022		Av 2011-16	Av 2017-22		Change pre-post	CAGR 2011-16	CAGR 2016-22
EXPORT	7	8	14	10	11	10	11	8	13	12	15	13		10	12		19.6%	7.1%	5.1%
Agriculture	2.2	1.9	3.6	4.2	3.2	2.0	3.4	1.5	1.9	2.9	2.8	1.2		2.8	2.3		-20.4%	-1.9%	-8.1%
Minerals							0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0		..	..	..
Chemicals	1.1	2.1	1.1	2.0	2.3	3.6	3.2	2.6	3.4	3.0	7.1	5.5		2.0	4.1		104.0%	27.8%	7.5%
Textiles	0.1	0.1	0.1	0.2	0.2	0.3	0.6	1.3	0.9	0.5	1.4	0.7		0.2	0.9		485.5%	20.9%	17.9%
Stone	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0		-45.7%	-18.6%	-51.1%
Metals	0.1	0.5	0.3	0.2	0.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0		0.2	0.0		-77.2%	-8.7%	-20.8%
Machinery	2.6	1.8	2.4	2.8	3.0	1.5	2.2	1.9	5.8	3.9	2.7	5.0		2.4	3.6		52.7%	-10.9%	22.8%
Vehicles	0.2	0.1	4.0	0.0	0.3	0.3	0.3	0.2	0.4	0.4	0.0	0.0		0.8	0.2		-74.4%	9.6%	-25.2%
Electronics	0.4	0.7	1.9	0.5	2.1	0.6	0.4	0.4	0.3	0.6	0.6	0.6		1.0	0.5		-52.9%	6.5%	-0.2%
Other	0.2	0.3	0.2	0.1	0.3	1.5	0.5	0.1	0.3	0.4	0.1	0.0		0.4	0.2		-49.0%	45.3%	-46.1%
IMPORT	242	219	186	247	254	207	270	351	302	271	220	298		226	285		26.3%	-3.1%	6.2%
Agriculture		0.3	0.6	1.2	1.6	1.8	2.0	1.8	2.1	2.5	3.3	3.7		0.9	2.6		187.7%	..	13.4%
Minerals							0.0		0.0		0.0	0.0		0.0	0.0		..	..	..
Chemicals		0.1		0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0		-54.1%	..	..
Textiles	1.6	0.5	0.5	0.3	0.0	1.3	3.2	4.0	3.5	7.1	2.9	2.4		0.7	3.9		449.7%	-4.8%	10.9%
Stone	240	218	185	245	252	204	264	345	296	262	213	292		224	279		24.4%	-3.2%	6.1%
Metals	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0		-16.8%	0.9%	-20.2%
Machinery	0.0	0.0	0.0	0.1	0.0	0.1	0.0	0.0	0.2	0.0	0.3	0.1		0.0	0.1		191.7%	65.0%	-6.2%
Vehicles	0.3								0.0		0.0	0.0		0.0	0.0		-99.5%	-100.0%	..
Electronics	0.5	0.1	0.0	0.0	0.2	0.2	0.1	0.0	0.0	0.0	0.1	0.2		0.2	0.1		-55.5%	-15.7%	-1.0%
Other	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0		-78.8%	22.3%	27.9%
TRADE BALANCE EU	-235	-212	-172	-237	-242	-197	-259	-343	-289	-260	-205	-285		-216	-273				
Agriculture	2	2	3	3	2	0	1	0	0	0	-1	-3		2	0				
Minerals	0	0	0	0	0	0	0	0	0	0	0	0		0	0				
Chemicals	1	2	1	2	2	4	3	3	3	3	7	6		2	4				
Textiles	-2	0	0	0	0	-1	-3	-3	-3	-7	-1	-2		-1	-3				
Stone	-240	-218	-185	-245	-252	-204	-264	-345	-296	-261	-213	-292		-224	-279				
Metals	0	0	0	0	0	0	0	0	0	0	0	0		0	0				
Machinery	3	2	2	3	3	1	2	2	6	4	2	5		2	4				
Vehicles	0	0	4	0	0	0	0	0	0	0	0	0		1	0				
Electronics	0	1	2	1	2	0	0	0	0	1	1	0		1	0				
Other	0	0	0	0	0	2	0	0	0	0	0	0		0	0				

Source: Own calculations based on Eurostat COMEXT data.

Figure 32: EU27 exports to Lesotho – main sectors (HS chapter) before and since the EPA (€ million)**Figure 33: EU27 imports from Lesotho – main sectors (HS chapter) before and since the EPA (€ million)**

Source: Own calculations based on Eurostat COMEXT data.

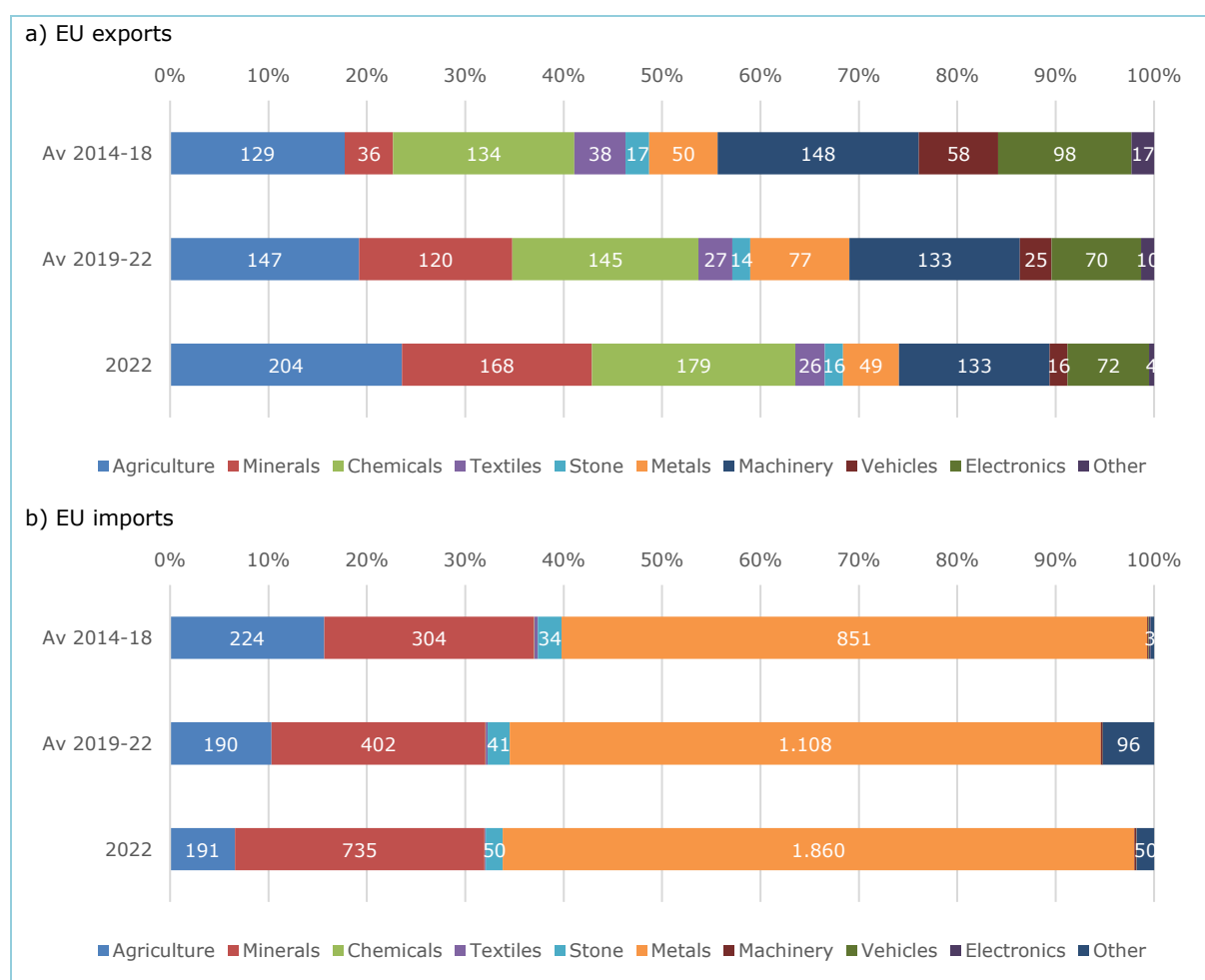
More details on key products traded between the EU and Lesotho are presented in section 4.3.

2.5. EU-Mozambique trade

The **EU's largest export sectors to Mozambique** since the EPA started to be applied in 2019 have been agriculture (€147 million per year on average in the period 2019 to 2022), chemicals (€145 million), and machinery (€133 million) (Figure 34a). Minerals, metals, and electronics follow. Comparing these exports with those in the five years prior to the EPA (i.e., 2014 to 2018) shows some divergence across sectors: prior to the EPA, machinery was the largest export (€148 million per year, on average), followed by chemicals (€134 million), and agriculture (€129 million). Agriculture, chemicals, and minerals also were the largest exports in 2022. Minerals exports expanded most rapidly, when comparing the per-EPA and EPA periods, by 237%, followed by metals (54%, although driven only by very high exports in one year, 2021) (Table 10). Other sectors whose exports expanded above average were agriculture (14.5%) and chemicals (8.7%). The other sectors' exports were lower in the EPA period than before; nevertheless, when comparing annual growth rates before and after the EPA started to be applied, the performance of all EU sectors except minerals has improved, i.e. annual average growth rates since 2018 were higher than over the period 2013 to 2018.

The **EU's imports from Mozambique** are dominated by metals (mostly aluminium), which account for about 60% of total imports – both before and since the EPA started to be applied (Figure 34b). Minerals (about 21%) and agriculture (with a declining share of 16% before the EPA and 10% since) follow; imports of other sectors are comparatively small. Imports of metals and minerals increased by about 30%, comparing annual averages in 2019 to 2022 with 2014 to 2018 (Table 10); metals imports were especially high in 2022, at close to €1.9 billion, almost twice the previous record of 2018. Conversely, imports of agricultural products declined by about 15%.

Figure 34: EU27-Mozambique bilateral trade by broad sector, before and since EPA (€ million)



Source: Own calculations based on Eurostat COMEXT data.

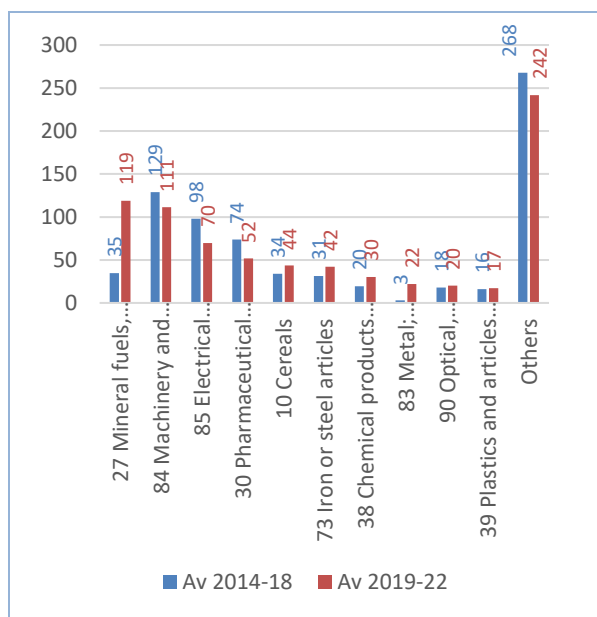
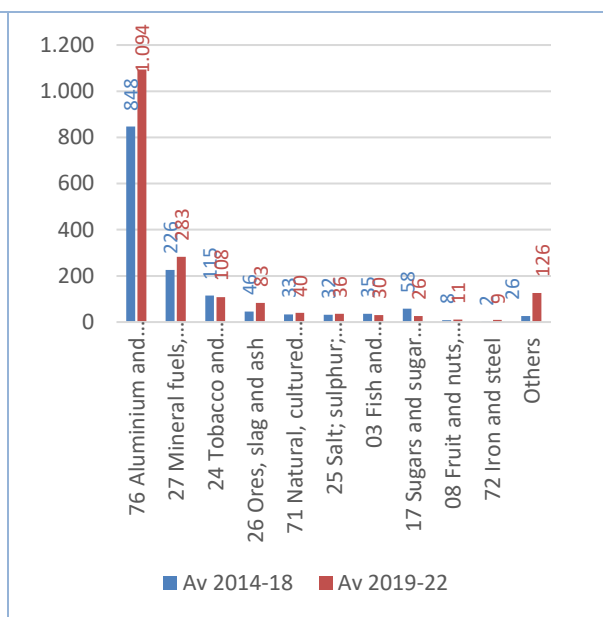
Data at the HS chapter level show that EU exports are quite diversified (Figure 35). Mineral fuels, machinery, electrical equipment, and pharmaceuticals were the main exports since the EPA started to be applied. However, annual average exports of all of these except mineral fuels were lower in the period 2019 to 2022 than in the previous five years. In contrast, export values of the smaller sectors – cereals, iron and steel, chemical products, and metal products all increased, although being still modest in absolute terms.

EU imports from Mozambique continue to be dominated by aluminium, which accounted for a stable share of 59% of total EU imports from the country both before and after the EPA started to be applied (Figure 36). Within the agriculture sector, tobacco leads, followed by fish and sugar – but import values in all three sectors were lower during the EPA period than before.

Table 10: EU27-Mozambique bilateral trade by broad sector, 2011-2022 (€ million)

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022		Av 2014-18	Av 2019-22		Change pre-post	CAGR 2013-18	CAGR 2018-22
EXPORT	564	666	782	844	940	665	505	670	698	696	811	868		725	768		6.0%	-3.1%	6.7%
Agriculture	78	102	121	115	119	132	149	129	129	132	124	204		129	147		14.5%	1.4%	12.1%
Minerals	49	30	9	40	27	16	4	91	102	122	87	168		36	120		237.3%	58.4%	16.7%
Chemicals	82	121	105	145	165	142	105	111	109	125	167	179		134	145		8.7%	1.1%	12.8%
Textiles	34	48	51	52	49	28	26	33	27	25	28	26		38	27		-29.4%	-8.1%	-6.1%
Stone	11	15	15	22	22	20	12	12	16	11	13	16		17	14		-19.7%	-3.7%	7.1%
Metals	31	48	69	62	85	40	28	37	38	62	160	49		50	77		53.8%	-11.6%	7.4%
Machinery	127	136	181	184	193	129	87	148	162	119	118	133		148	133		-10.3%	-3.9%	-2.6%
Vehicles	46	52	63	90	106	70	14	13	29	23	32	16		58	25		-57.6%	-26.7%	4.5%
Electronics	95	97	134	124	158	66	68	75	75	66	67	72		98	70		-28.9%	-11.0%	-1.1%
Other	10	17	36	11	17	21	14	20	10	11	15	4		17	10		-39.2%	-10.6%	-31.4%
IMPORT	1,235	1,181	1,229	1,270	1,332	1,230	1,568	1,748	1,663	1,250	1,572	2,897		1,430	1,846		29.1%	7.3%	13.5%
Agriculture	212	221	218	254	266	221	201	180	228	163	180	191		224	190		-15.2%	-3.8%	1.5%
Minerals	80	109	145	165	209	205	416	527	418	185	268	735		304	402		31.9%	29.5%	8.7%
Chemicals	0	0	0	0	0	0	2	0	0	0	0	1		1	0		-28.6%	2.5%	91.7%
Textiles	5	3	4	3	8	8	4	3	4	5	3	3		5	4		-33.0%	-5.2%	-3.1%
Stone	5	11	6	19	18	37	44	53	40	31	44	50		34	41		20.5%	54.8%	-1.8%
Metals	926	826	834	812	822	751	895	974	968	861	744	1,860		851	1,108		30.3%	3.2%	17.6%
Machinery	1	2	2	1	1	1	1	4	2	2	4	6		2	4		107.5%	12.7%	7.9%
Vehicles	0	0	0	0	2	1	1	1	0	0	0	1		1	0		-44.1%	34.3%	-3.1%
Electronics	1	1	1	11	1	1	0	1	0	0	0	1		3	0		-81.1%	7.6%	1.4%
Other	5	8	18	5	6	4	4	4	2	2	328	50		5	96		1939.1%	-25.2%	86.0%
TRADE BALANCE EU	-671	-515	-446	-426	-392	-566	-1,063	-1,078	-965	-553	-761	-2,030		-705	-1,077				
Agriculture	-134	-120	-98	-139	-146	-89	-53	-50	-98	-30	-56	14		-95	-43				
Minerals	-31	-78	-136	-125	-181	-189	-412	-437	-316	-63	-181	-567		-269	-282				
Chemicals	82	121	105	145	165	142	102	111	109	124	167	178		133	145				
Textiles	29	45	47	49	41	20	22	30	23	20	26	23		32	23				
Stone	6	4	9	3	3	-17	-32	-41	-24	-21	-32	-33		-17	-27				
Metals	-894	-778	-766	-750	-738	-711	-867	-937	-930	-799	-584	-1,811		-800	-1,031				
Machinery	126	134	178	183	192	128	86	144	160	117	114	127		147	129				
Vehicles	46	52	63	90	104	69	13	12	28	23	31	15		58	24				
Electronics	95	96	134	113	157	65	68	74	74	66	66	71		95	69				
Other	5	9	18	5	12	17	10	16	8	9	-313	-46		12	-85				

Source: Own calculations based on Eurostat COMEXT data.

Figure 35: EU27 exports to Mozambique – main sectors (HS chapter) before and since the EPA (€ million)**Figure 36: EU27 imports from Mozambique – main sectors (HS chapter) before and since the EPA (€ million)**

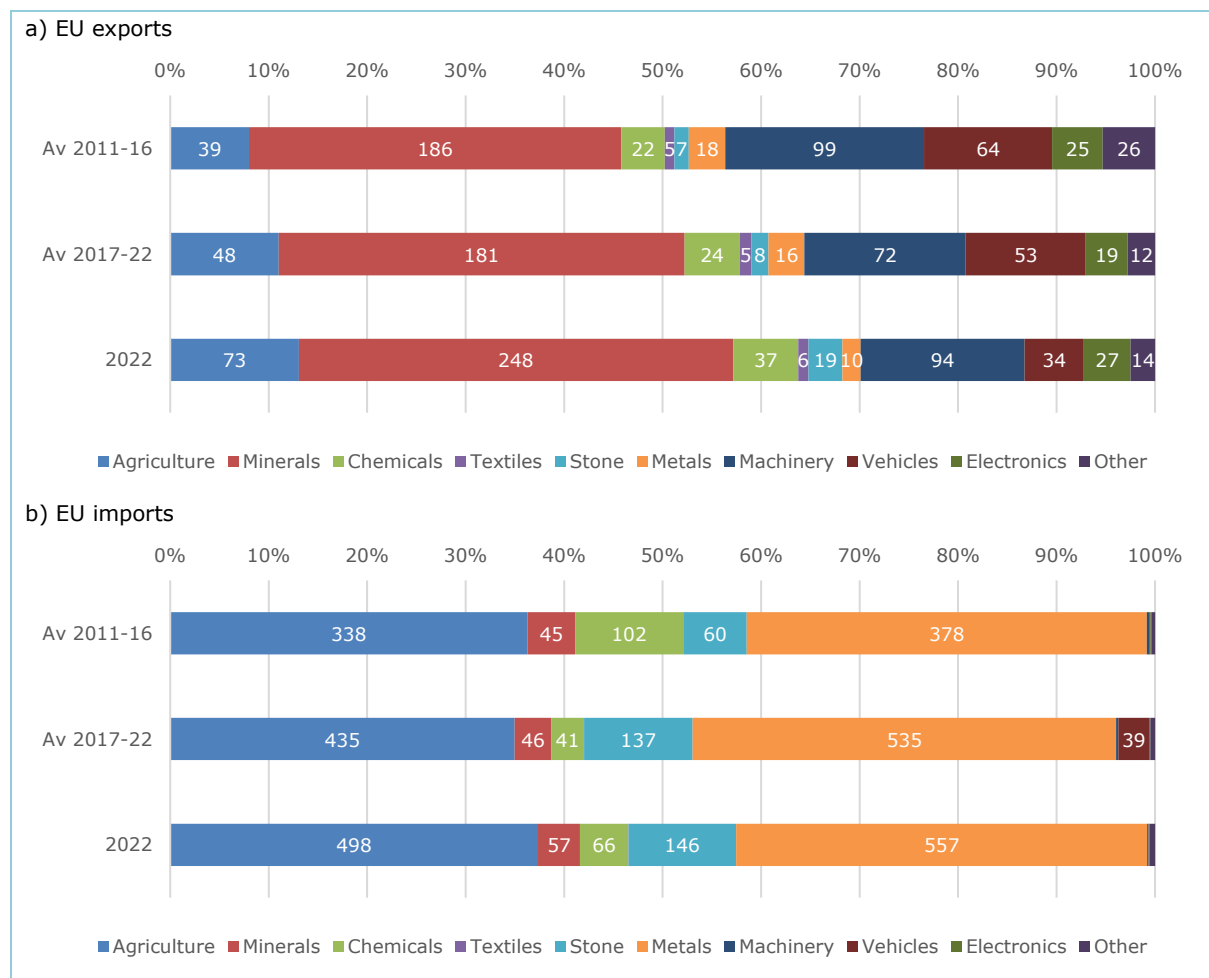
Source: Own calculations based on Eurostat COMEXT data.

More details on key products traded between the EU and Mozambique are presented in section 4.4.

2.6. EU-Namibia trade

EU exports to Namibia are led by minerals, followed with some distance by machinery, vehicles, and agricultural products (Figure 37a). With the EU's average annual exports to Namibia being lower in the EPA period than before (see section 1.6 above), only agricultural and chemical exports grew against the trend. Nevertheless, the largest export sectors defended their shares in the export portfolio as their declines were in line with (or slower than) the average total decline: minerals exports decreased from €186 million per year in the period 2011 to 2016 (37.8% of total EU exports to Namibia) to €181 million since the start of application of the EPA (41.2%); similar developments applied to machinery and vehicles. However, minerals and machinery exports (as well as most other sectors, apart from vehicles and metals) strongly recovered in 2022 (Table 11). Leaving aside minerals, the strongest increases in the export mix over time were for agricultural and chemical products: the former one's increased from an average of 8.0% in 2011 to 2016, to 11.0% in 2017 to 2022, and reached 13.1% in 2022; the corresponding figures for chemicals were 4.4%, 5.6%, and 6.6%.

Namibia's exports to the EU are led by metals – on average €378 million in the per-EPA years and €535 million since 2017 – and agriculture (€378 million and €435 million in the two periods); together, the two sectors account for close to 80% of Namibia's total exports to the EU (Figure 37b). Stone, chemicals and minerals constitute a second tier of exports, whereas exports of other sectors are insignificant (Table 11). Comparing the periods before and since the EPA started to be applied, the composition of exports by broad sectors has hardly changed.

Figure 37: EU27-Namibia bilateral trade by broad sector, before and since EPA (€ million)

Source: Own calculations based on Eurostat COMEXT data.

A slightly more granular review at the HS chapter level shows that EU exports to Namibia are led, quite unusual when considering the EU's overall export composition, by raw materials (Figure 38): ores (mostly copper) were the most important exports both in the years before the EPA (average annual value of €115 million, 23.4% of total exports to Namibia) and since then (€128 million, 29.1%), and mineral fuels the third most important one. The former exports take place within the copper value chain: copper ore from the Chelopech mine in Bulgaria is exported to Namibia for processing at the Tsumeb smelter, and then re-exported as copper to the EU; both the mine and the smelter are owned by Dundee Precious Metals, a Canadian mining company. The high average value of mineral fuels exports since the EPA's start of application is mainly a consequence of very high exports of fuel in 2022. Other leading export sectors are more conventional: machinery and mechanical appliances, ships, electrical equipment, and vehicles. In line with the overall decrease in exports from the pre-EPA period to the EPA-period, average annual exports in most sectors – excluding ores and vehicles – declined.⁴

EU imports from Namibia at the HS chapter level are also quite diversified when compared to most other SADC EPA States, although with a tendency toward more concentration (Figure 39). Copper and fish are the two traditional main exports. Copper substantially increased its share in the total portfolio, from 27% in the period 2011 to 2016 to 39% since the EPA started to be applied. Exports of fish, precious minerals (mainly diamonds) and wood articles (mostly charcoal) also were substantially higher since the EPA started

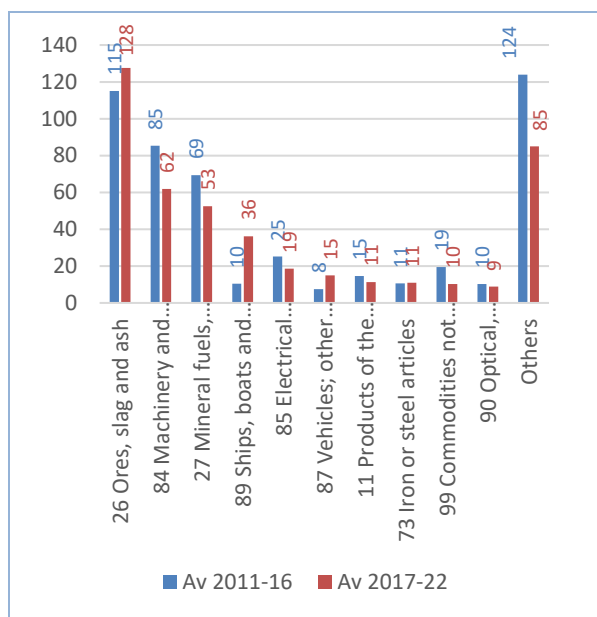
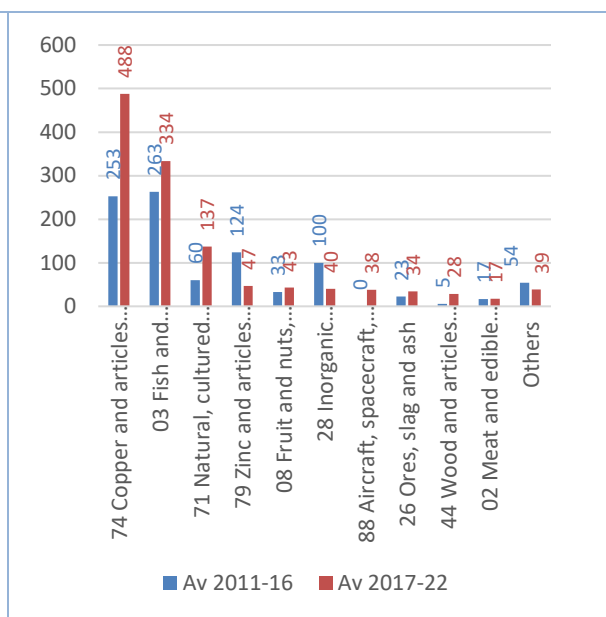
⁴ The increase in exports of ships is due to an unusually high export value in 2021.

to be applied. Conversely, exports of zinc and inorganic chemicals substantially decreased in value.

Table 11: EU27-Namibia bilateral trade by broad sector, 2011-2022 (€ million)

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022		Av 2011-16	Av 2017-22		Change pre-post	CAGR 2011-16	CAGR 2016-22
EXPORT	469	580	689	527	351	335	444	380	379	354	513	562		492	439		-10.8%	-6.5%	9.0%
Agriculture	42	37	35	44	35	43	52	45	44	32	45	73		39	48		22.9%	0.5%	9.3%
Minerals	183	261	231	208	108	124	219	150	153	166	147	248		186	181		-2.8%	-7.4%	12.2%
Chemicals	22	24	26	18	19	23	18	20	26	20	26	37		22	24		11.9%	0.6%	8.5%
Textiles	4	5	4	5	7	5	3	4	7	3	9	6		5	5		11.9%	5.0%	3.4%
Stone	11	8	8	4	5	6	7	4	3	4	7	19		7	8		4.9%	-10.4%	20.3%
Metals	23	12	13	29	20	12	14	17	26	14	15	10		18	16		-11.7%	-12.3%	-2.3%
Machinery	82	88	106	147	98	75	65	64	72	61	76	94		99	72		-27.6%	-1.6%	3.7%
Vehicles	9	103	230	12	17	13	34	42	21	30	159	34		64	53		-16.6%	6.5%	17.3%
Electronics	29	22	22	36	24	18	21	22	14	13	15	27		25	19		-25.8%	-9.3%	6.8%
Other	64	21	14	24	19	16	11	12	12	11	14	14		26	12		-53.4%	-24.8%	-1.7%
IMPORT	905	889	845	908	987	1,050	1,265	1,265	1,132	1,110	1,361	1,334		931	1,245		33.7%	3.0%	4.1%
Agriculture	305	318	325	335	365	377	403	434	470	382	425	498		338	435		29.0%	4.3%	4.8%
Minerals	37	57	47	62	43	25	57	54	47	21	41	57		45	46		2.0%	-7.7%	14.8%
Chemicals	65	103	106	91	146	101	68	6	17	27	63	66		102	41		-59.6%	9.3%	-6.9%
Textiles	0	0	0	0	0	0	0	1	0	0	0	0		0	0		16.3%	30.4%	-2.1%
Stone	42	41	52	54	48	123	127	114	135	126	176	146		60	137		129.5%	23.8%	2.8%
Metals	449	362	308	361	372	416	601	639	452	538	424	557		378	535		41.5%	-1.5%	5.0%
Machinery	2	3	3	2	2	3	3	3	4	2	2	2		3	3		-5.0%	7.0%	-10.6%
Vehicles	0	1	1	1	1	1	1	1	2	2	227	0		1	39		6604.4%	37.0%	-11.8%
Electronics	0	2	1	0	1	1	1	0	1	4	0	1		1	1		52.9%	16.8%	5.9%
Other	4	3	3	2	7	3	3	13	4	7	2	7		4	6		66.4%	-6.6%	17.5%
TRADE BALANCE EU	-436	-309	-157	-382	-635	-716	-821	-885	-754	-756	-849	-772		-439	-806				
Agriculture	-263	-280	-290	-291	-330	-334	-351	-389	-426	-351	-380	-425		-298	-387				
Minerals	145	204	184	146	65	100	162	97	107	145	106	191		141	135				
Chemicals	-43	-79	-80	-74	-127	-78	-50	13	9	-6	-37	-29		-80	-17				
Textiles	4	5	3	5	6	4	3	4	7	3	8	5		5	5				
Stone	-31	-33	-44	-49	-43	-117	-120	-110	-132	-122	-169	-126		-53	-130				
Metals	-426	-350	-295	-332	-352	-405	-587	-622	-426	-524	-409	-547		-360	-519				
Machinery	79	85	103	145	96	72	62	61	68	59	74	92		97	69				
Vehicles	9	102	230	11	16	12	33	41	19	28	-68	33		63	14				
Electronics	29	20	21	35	23	17	21	21	13	8	15	26		24	17				
Other	4	18	11	22	11	13	8	-1	8	4	12	7		13	6				

Source: Own calculations based on Eurostat COMEXT data.

Figure 38: EU27 exports to Namibia – main sectors (HS chapter) before and since the EPA (€ million)**Figure 39: EU27 imports from Namibia – main sectors (HS chapter) before and since the EPA (€ million)**

Source: Own calculations based on Eurostat COMEXT data.

More details on key products traded between the EU and Namibia are presented in section 4.5.

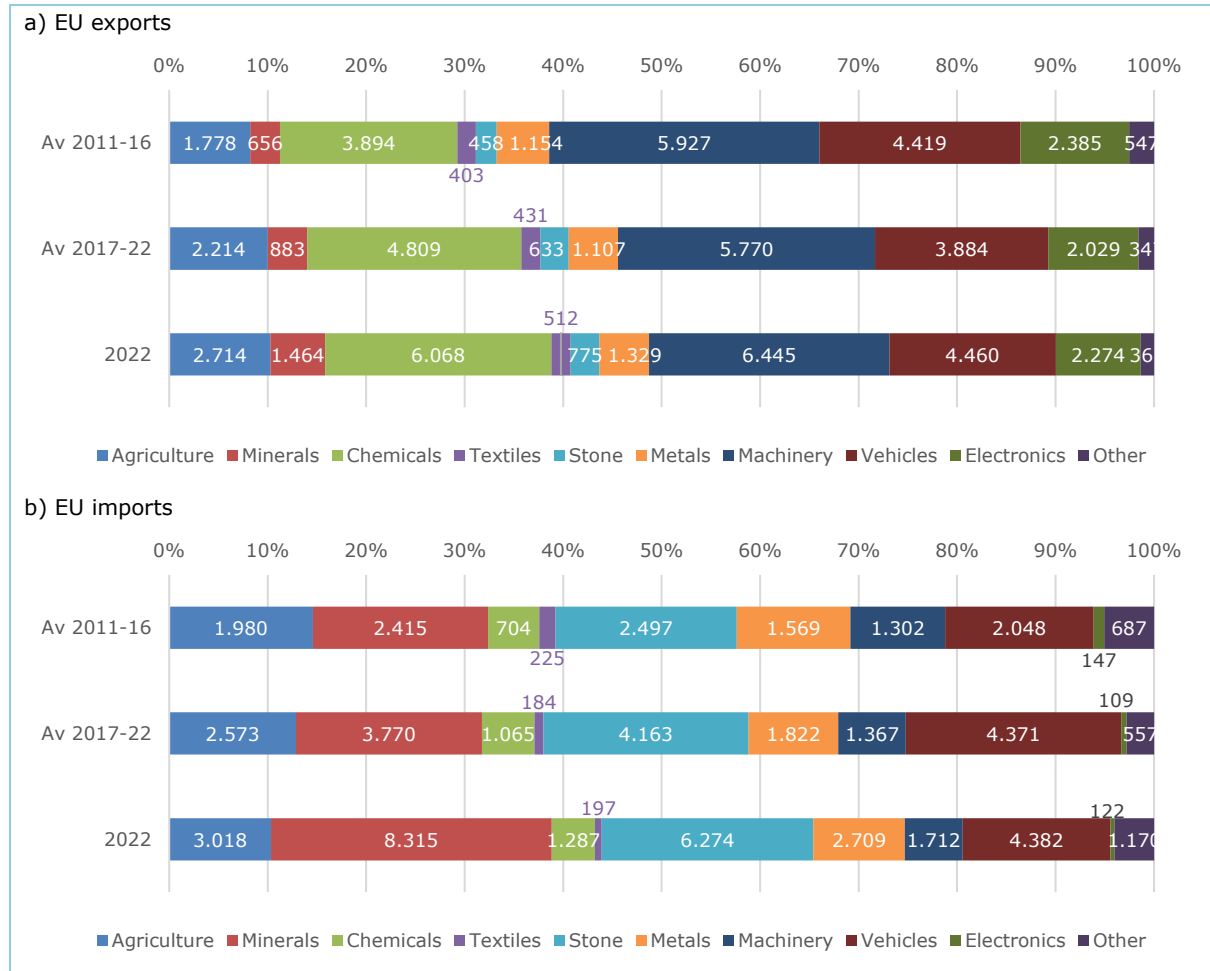
2.7. EU-South Africa trade

As South Africa is by far the EU's largest trading partner among the SADC EPA States, bilateral trade is also most diversified (Figure 40a). The **EU's exports to South Africa** are led by machinery, vehicles, and chemicals. Whereas the former was the leading export both in the five years prior to the EPA (average annual export value of €5.9 billion before and €5.8 billion since the EPA has been applied), vehicles (€4.4 billion before and €3.9 billion since the EPA) was overtaken by chemicals (from €3.9 billion to €4.8 billion), and in 2022 chemicals exports (€6.1 billion) almost reached those of machinery (€6.4 billion). Agriculture and machinery constitute a second tier of exports, with values of about €2 billion, followed with some distance by minerals, metals, stone, and textiles. Comparing the average performance in the years 2017 to 2022 with the pre-EPA period, exports of about half of the sectors grew, but electronics, vehicles, metals, and machinery decreased (Table 12). However, much of this decrease is owed to declines in the earlier years, and in fact annual growth from 2016 to 2022 exceeded the performance in the years up to 2016 for virtually all sectors. Notably, the recovery in 2021 and 2022 from the drop induced by COVID-19 in 2020 was strong across the board.

EU imports from South Africa are also quite diversified (Figure 40b). The leading sectors are vehicles, stone, and minerals, all of which almost doubled when comparing annual averages in the pre-EPA period with those from 2017 to 2022. However, the order of the top three was turned upside-down: EU vehicles imports from South Africa increased from €2.0 billion (third rank) to €4.4 billion (first rank), metals from €2.5 billion (first rank) to €4.2 billion (second rank), and minerals from €2.4 billion (second rank) to €3.8 billion (third rank). Agriculture, metals, and chemicals follow, whereas imports of textiles and electronics are comparatively modest. These last two sectors are also the only ones for which average imports in the period 2017 to 2022 were lower than in the years leading up to 2016 (Table 12); all others saw mostly rapid increases of up to 113% (vehicles). Other sectors that expanded more than the average of 47% are stone, minerals, and chemicals. At the same time, the growth in vehicles imports stalled in more recent years: whereas

the average annual growth rate in the years 2011 to 2016 was 18.4%, this decreased to 3.2% in the years 2017 to 2022, and imports in 2022 were in fact still below those in 2018 and 2019.

Figure 40: EU27-South Africa bilateral trade by broad sector, before and since EPA (€ million)



Source: Own calculations based on Eurostat COMEXT data.

Comparing EU exports and imports by broad sector shows that the EU’s comparative advantages as revealed by the **sectoral trade balances** have been fairly stable over the years, for most sectors (Table 12): persistent sectoral deficits were registered in stone, minerals, metals, and agriculture, and surpluses in machinery, chemicals, electronics, and textiles. Only for vehicles a substantial surplus in the years up to 2017 turned into a deficit from 2018 to 2021 and an almost balanced trade in 2022. Automotive trade between the EU and South Africa is a prime example of intra-industry trade driven by close value chain integration (as will be addressed in a case study).

Statistics at the HS chapter level add limited information to the broad sectoral analysis. Regarding EU exports to South Africa, the important role of pharmaceuticals within the chemicals sector is shown, followed by plastics, and other chemicals products (Figure 41). Also, exports of the three leading sectors decreased when comparing the EPA period with the pre-EPA period, whereas other important sectors saw export increases. With respect to EU imports, the important role of fruit and nuts among agricultural products becomes clear (Figure 42); for more details on the most important export products, see section 4 below.

Table 12: EU27-South Africa bilateral trade by broad sector, 2011-2022 (€ million)

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022		Av 2011-16	Av 2017-22		Change pre-post	CAGR 2011-16	CAGR 2016-22
EXPORT	22,036	22,537	21,591	20,508	22,453	20,599	22,023	21,723	22,893	17,578	22,014	26,402		21,621	22,106		2.2%	-1.3%	4.2%
Agriculture	1,553	1,794	1,707	1,768	1,919	1,929	1,982	2,005	2,317	2,058	2,208	2,714		1,778	2,214		24.5%	4.4%	5.9%
Minerals	881	901	741	426	569	418	733	907	525	558	1,109	1,464		656	883		34.6%	-13.8%	23.2%
Chemicals	3,676	3,907	3,777	3,910	4,256	3,836	4,224	4,463	4,639	4,101	5,361	6,068		3,894	4,809		23.5%	0.9%	7.9%
Textiles	366	392	389	399	445	428	422	441	456	323	431	512		403	431		6.9%	3.2%	3.0%
Stone	418	414	448	454	483	530	492	589	580	582	779	775		458	633		38.2%	4.9%	6.5%
Metals	1,205	1,279	1,202	1,058	1,163	1,020	1,147	1,116	1,121	810	1,117	1,329		1,154	1,107		-4.2%	-3.3%	4.5%
Machinery	6,114	6,193	5,978	5,671	5,937	5,667	6,012	5,813	6,255	4,634	5,459	6,445		5,927	5,770		-2.6%	-1.5%	2.2%
Vehicles	4,402	4,344	4,310	4,411	4,840	4,208	4,528	3,957	4,459	2,602	3,300	4,460		4,419	3,884		-12.1%	-0.9%	1.0%
Electronics	2,622	2,672	2,581	1,987	2,356	2,089	2,088	2,107	2,197	1,636	1,870	2,274		2,385	2,029		-14.9%	-4.4%	1.4%
Other	800	643	456	423	485	475	395	327	345	274	379	361		547	347		-36.6%	-9.9%	-4.5%
IMPORT	14,749	13,027	12,236	12,967	14,234	14,232	15,871	17,237	18,996	16,487	22,107	29,185		13,574	19,981		47.2%	-0.7%	12.7%
Agriculture	1,817	1,818	1,987	1,926	2,119	2,211	2,320	2,537	2,360	2,543	2,657	3,018		1,980	2,573		29.9%	4.0%	5.3%
Minerals	3,199	2,550	2,140	2,687	2,177	1,734	2,075	1,909	2,638	2,717	4,966	8,315		2,415	3,770		56.1%	-11.5%	29.9%
Chemicals	722	744	710	724	678	648	770	991	1,121	976	1,245	1,287		704	1,065		51.2%	-2.1%	12.1%
Textiles	350	261	206	187	164	184	201	208	204	147	147	197		225	184		-18.3%	-12.1%	1.2%
Stone	2,656	2,344	2,294	2,426	2,683	2,582	2,620	3,275	3,462	3,672	5,678	6,274		2,497	4,163		66.7%	-0.6%	15.9%
Metals	1,883	1,578	1,652	1,451	1,578	1,274	1,826	1,828	1,615	1,120	1,832	2,709		1,569	1,822		16.1%	-7.5%	13.4%
Machinery	1,702	1,395	1,194	1,176	1,237	1,108	1,119	1,149	1,269	1,258	1,695	1,712		1,302	1,367		5.0%	-8.2%	7.5%
Vehicles	1,562	1,303	1,148	1,768	2,877	3,630	3,907	4,759	5,994	3,689	3,495	4,382		2,048	4,371		113.4%	18.4%	3.2%
Electronics	222	132	121	135	167	103	132	106	106	90	97	122		147	109		-25.8%	-14.2%	2.8%
Other	635	902	784	487	554	758	902	475	229	273	294	1,170		687	557		-18.9%	3.6%	7.5%
TRADE BALANCE EU	7,287	9,510	9,355	7,541	8,219	6,367	6,152	4,487	3,897	1,091	-93	-2,783		8,046	2,125				
Agriculture	-264	-24	-281	-158	-200	-282	-337	-532	-44	-485	-449	-304		-201	-359				
Minerals	-2,319	-1,649	-1,399	-2,261	-1,608	-1,316	-1,342	-1,002	-2,113	-2,159	-3,857	-6,851		-1,759	-2,887				
Chemicals	2,955	3,163	3,067	3,186	3,578	3,188	3,454	3,472	3,518	3,125	4,115	4,781		3,189	3,744				
Textiles	16	130	183	212	281	244	221	233	252	176	285	315		178	247				
Stone	-2,238	-1,930	-1,845	-1,972	-2,200	-2,052	-2,129	-2,686	-2,882	-3,089	-4,899	-5,499		-2,040	-3,531				
Metals	-678	-300	-450	-394	-415	-254	-680	-713	-494	-311	-715	-1,379		-415	-715				
Machinery	4,411	4,798	4,784	4,495	4,699	4,559	4,894	4,664	4,986	3,375	3,765	4,733		4,625	4,403				
Vehicles	2,840	3,041	3,162	2,643	1,963	578	621	-803	-1,534	-1,088	-195	79		2,371	-487				
Electronics	2,399	2,541	2,460	1,853	2,189	1,985	1,956	2,001	2,092	1,546	1,773	2,152		2,238	1,920				
Other	635	-260	-328	-64	-69	-283	-507	-148	116	1	86	-809		-62	-210				

Source: Own calculations based on Eurostat COMEXT data.

Figure 41: EU27 exports to South Africa – main sectors (HS chapter) before and since the EPA (€ million)

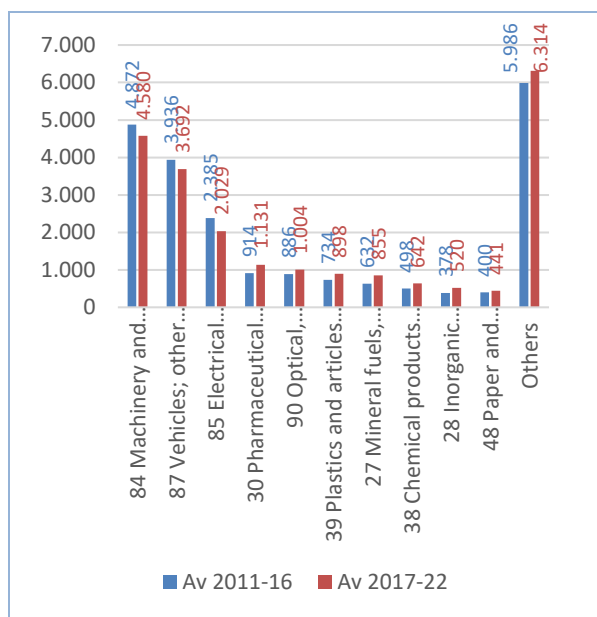
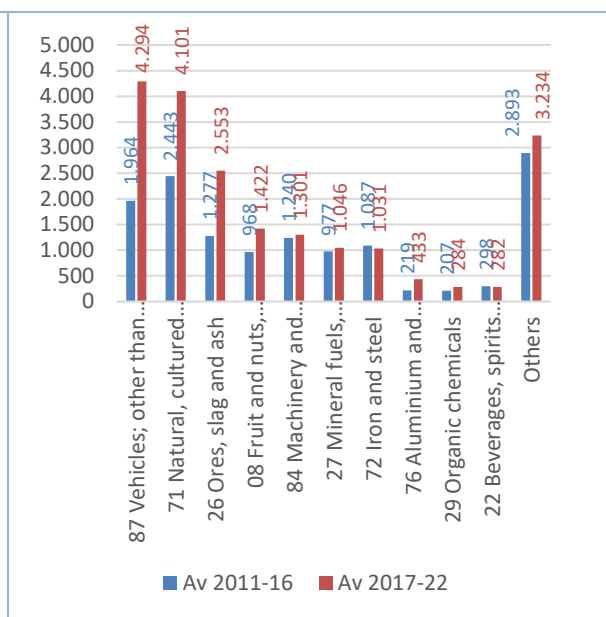


Figure 42: EU27 imports from South Africa – main sectors (HS chapter) before and since the EPA (€ million)



Source: Own calculations based on Eurostat COMEXT data.

More details on key products traded between the EU and South Africa are presented in section 4.6.

3. COMPARISON OF TRENDS & PATTERNS IN EU-SADC EPA TRADE WITH TRENDS OF THE PARTIES' TRADE WITH OTHER MAJOR TRADING PARTNERS AND GLOBAL TRADE

The objective of the EPA, as of any trade agreement, is to encourage trade between the Parties. If successful, a consequence of the stronger trade between the Parties is that the share of bilateral trade in the Parties' total trade will increase. For the EPA, this expectation has to be slightly modified due to the fact that trade between the EU and the SADC EPA States already benefitted from trade preferences before the start of application of the EPA, with the exception of EU exports to Mozambique.⁵ But in any case, the expectation is that the share of intra-EPA trade in the Parties' total trade should not decrease.

The following sections analyse to what extent the EPA has fulfilled this expectation. We first review the shares of the EU's and SADC EPA States' bilateral exports and imports in their total exports and imports over time, and then compare each Party's trade with the other EPA Party with its trade with other major economies and trading partners, i.e. with Australia, Brazil, China, India, Russia, Turkey, the UK⁶ and the United States.

⁵ As explained above, trade between South Africa and the EU took place under the TDCA. EU exports to the other SACU countries in practice also benefitted from the TDCA preferences, and these SACU countries in turn benefitted from the EU's preferential ACP trade regime. Mozambique's exports to the EU benefitted from the EBA.

⁶ Since the departure of the UK from the EU in 2021 (and, accordingly, its departure from the EPA), trade between the SADC EPA States and the UK takes place under a SADC EPA-UK EPA, which provides comparable conditions as the EU-SADC EPA. Any deviations in trade trends between the EU27's and the UK's trade with the SADC EPA States could therefore not be explained by the tariff preferences provided by the EPAs. In any case, we pay particular attention to any differences in performance between the EU27 and the UK in the analysis that follows.

For consistency reasons across countries and because Eurostat data do not report total exports and imports of non-EU economies, this analysis is based on trade data obtained from UN COMTRADE and ITC TradeMap. It should be noted that these data do not always align with Eurostat data, and there may therefore be inconsistencies in data reported in this section compared to sections 1 and 2.

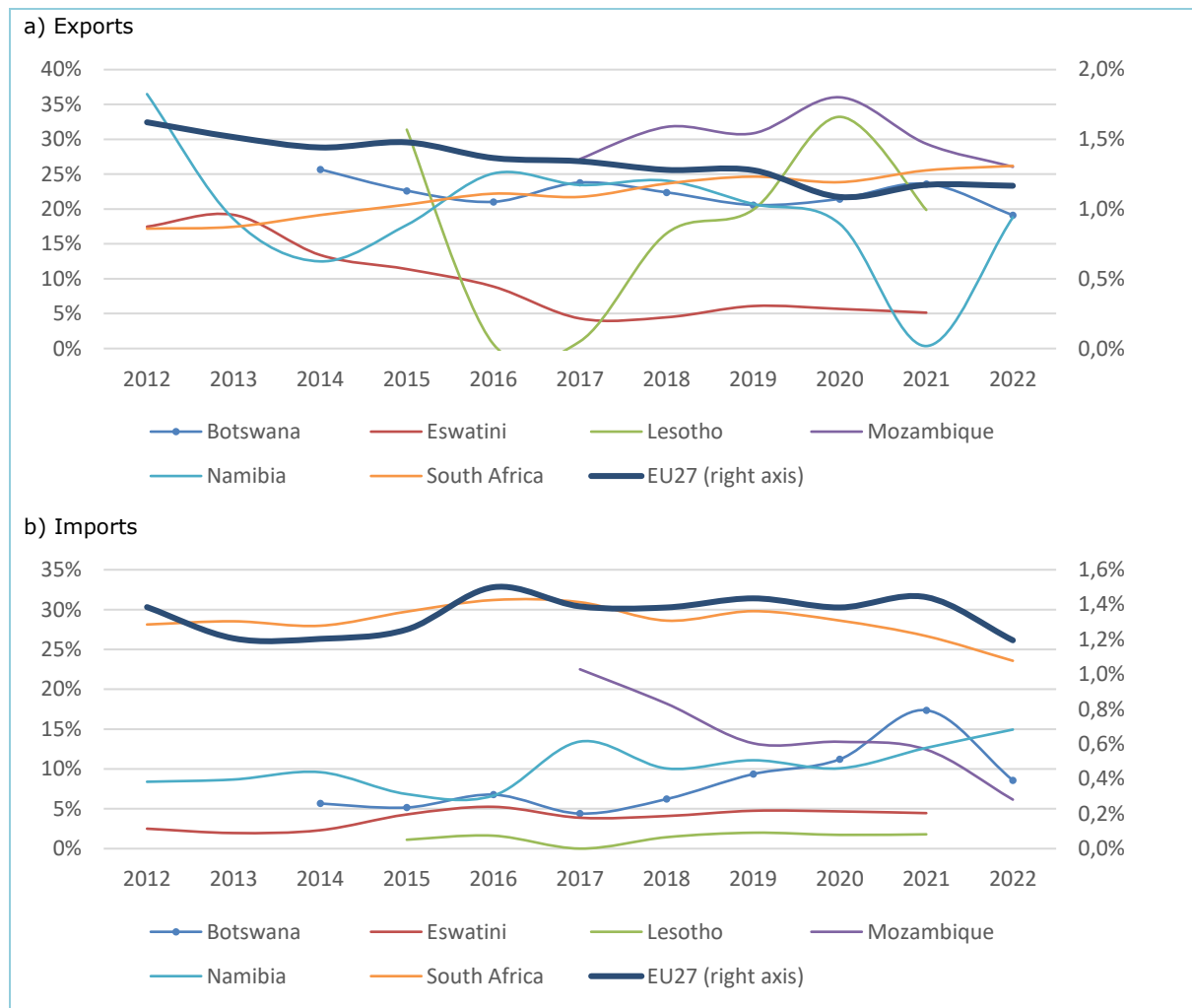
3.1.EU–SADC EPA State bilateral trade versus total trade

As Figure 43a shows, the **share of EU exports destined to the SADC EPA States** has been on a downward trend since before the EPA started to be applied: in 2012, 1.6% of the total EU export value went to the six countries. This had decreased to 1.3% by 2016, and then fell further to 1.1% in 2020. Since then, it slightly increased again, to 1.2% in 2021 and 2022.

The **importance of the EU27 as an export market for the SADC EPA States** varies considerably, as does the performance over time: In terms of importance, the EU absorbs between 5% (Eswatini) and about 30% (Mozambique) of SADC EPA States' total exports; for most of the six countries the share in recent years was between 20% and 25%. Regarding performance over time, for Botswana, Eswatini and Namibia, the share of exports to the EU in total exports has been fairly stable since the EPA started to be applied.⁷ For South Africa, the trend has been positive both before and since the EPA's start of application, although the growth of EU's share in total exports slowed down in recent years. For Lesotho, the EU's share in exports has fluctuated widely over the years, mostly as a consequence of the small size of exports overall. Finally, Mozambique is the only country where the EU has lost importance as an export market since the EPA started to be applied; however, it has to be stressed that trade since 2020 has taken place in quite exceptional global circumstances, and it may therefore be too early to draw conclusions on the effectiveness of the EPA from the observed comparative performance.

⁷ Export values reported for Namibia in 2021 are obviously wrong (see Table 29 in Annex) and should be disregarded.

Figure 43: Share of bilateral trade between the EU and SADC EPA States in the Parties' total trade, 2012-2022 (EU27 for each SADC EPA State; SADC EPA States combined for the EU27)



Source: Own calculations based on UN COMTRADE data (Table 29 and Table 30 in Annex).

For the **EU27**, the share of imports coming from the SADC EPA States has hardly changed since 2017, at 1.4% of total imports, except for a drop in 2022, to 1.2% (Figure 43b). At the same time, the share during the EPA period was slightly higher than in most years prior to the EPA's start of application.

The **importance of the EU27 as a supplier for most SADC EPA States** – except South Africa and Eswatini for much of the period considered – is lower than its role as an export market. South Africa used to purchase about 30% of its total imports from the EU before the EPA as well as in its first years. However, since 2019 this share decreased steadily to 23.6% in 2022. A rapid decrease in imports from the EU also took place in Mozambique, from a share of 22.5% of all imports being sourced by the EU27 in 2017, to 6.2% in 2022. In contrast, the EU27 became a more important supplier to Namibia and Botswana (except 2022 for Botswana): whereas Namibia used to source from the EU 10% and less of its total imports up to 2016, this increased to 14.9% in 2022; for Botswana, the share of EU imports in total imports rapidly increased from 4.4% in 2017 to 17.4% in 2021, but then fell sharply to 8.6% in 2022. For the remaining two SADC EPA States, Eswatini and Lesotho, the EU's share in total imports remained largely stable over time, and limited, at just below 5% for Eswatini and about 2% for Lesotho.

Summarising these observations, **the long-term loss of importance of the SADC EPA States as a destination for EU exports (in relation to the EU's total extra-EU**

exports) runs counter the expectation that the EPA would foster trade between the Parties. In contrast, the stability of the EU’s share in most SADC EPA States’ exports is in line with the continuation of preferential market access that these exports benefit from in the EU under the EPA.

Considering that the EPA has hardly changed the EU’s de facto market access to SACU countries, **the limited changes for Eswatini and Lesotho are in line with expectations. Conversely, the improving trends in Botswana and Namibia, as well as the decreasing role in South Africa require further analysis. However, the rapidly declining share of EU imports in Mozambique’s total imports since the start of application of the EPA in 2018 (and the start of tariff preferences in 2019) is the observation that is most at odds with the expectation of the EPA as a trade-increasing instrument.** Further analysis is provided in the following sections.

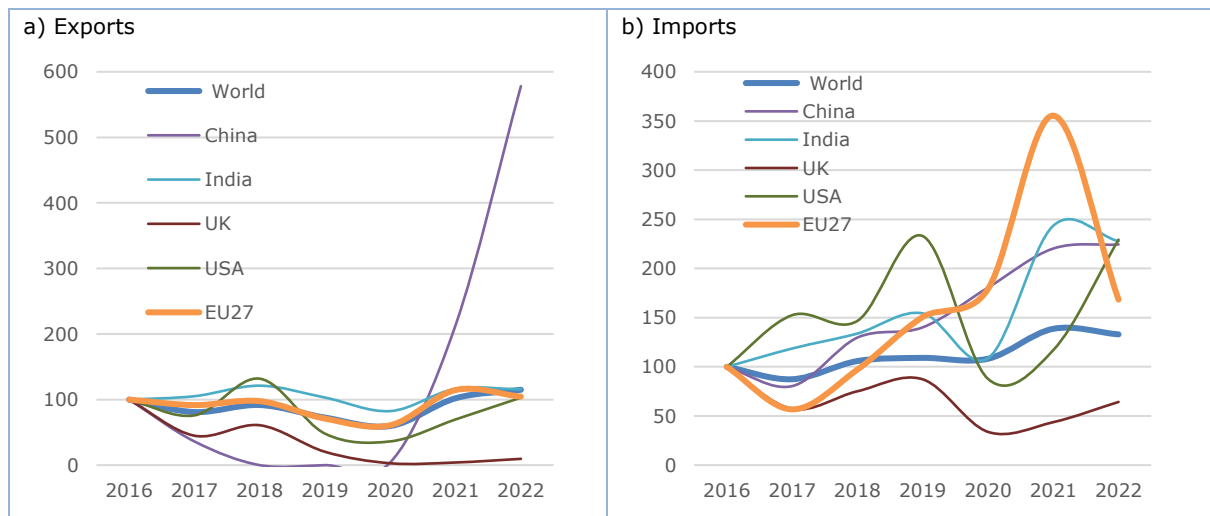
3.2. Comparative review of Botswana’s trade with the EU

As noted above, the **share of the EU in Botswana’s exports** remained fairly stable over time, whereas the share of Botswana imports coming from the EU increased until 2021 and then sharply dropped. These trends can also be seen from Figure 44, which shows trends in Botswana’s trade with selected (non-African) trading partners, using an index with sets trade values in 2016, at the start of the EPA, at 100. For Botswana’s exports (Figure 44a), total exports and exports to the EU developed almost exactly in the same way – as did exports to other destinations, except for those to China (which were very volatile and dropped to zero from 2018 to 2020 but then sharply increased in 2021 and 2022) and the UK, which sharply decreased and almost vanished since 2018.

As Table 31 in the Annex shows, the increase in exports to China was entirely due to a rapid increase in minerals exports in 2021 and 2022. Regarding the UK, the main export used to be agricultural products (principally beef); these exports also decreased substantially to the EU, but less so than to the UK. The Table also shows that with the exception of stone (i.e., diamonds), the selected non-African trading partners account for only very small shares in Botswana’s exports. Because of the limited export values of non-diamond exports to non-African countries, it is difficult to draw conclusions about the effect of the EPA on the importance of the EU27 as an export market, however **exports to the EU in virtually all broad sectors, including agricultural products, chemicals, textiles, metals, machinery, and electronics, have performed less dynamic than Botswana’s total exports in the sectors – both when comparing export values before and since the EPA’s start of application and when looking at average annual growth rates since the start of the EPA.**

Botswana’s imports from the EU, in contrast, developed quite dynamically after an initial drop in 2017 and up to 2021, but then dropped markedly in 2022 (Figure 44b). From 2016 to 2022 overall, imports from the EU still outperformed Botswana’s total imports, but the index of imports from China, India and the United States overtook imports from the EU in 2022 – in value terms, however, all of these remain much smaller suppliers than the EU. As with exports, Botswana’s imports from the UK have fallen behind, although somewhat recovering since 2020; but in 2022 they were still some 40% below the 2016 value.

Figure 44: Botswana’s trade with the EU27 compared with selected other trading partners (index, 2016=100)

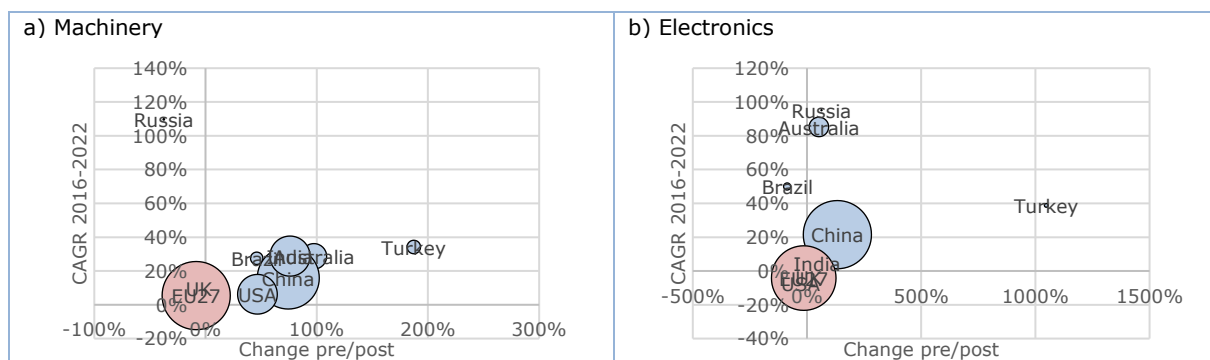


Source: Own calculations based on UN COMTRADE data (Table 29 and Table 30 in Annex).

As Table 32 in the Annex shows, the selected trading partners account for very small shares in Botswana’s imports in most sectors, except for stone (diamonds), machinery and electronics; indeed most imports across all sectors originate in South Africa/SACU.

For both machinery and electronics, imports from the EU have fallen behind major competitors (Figure 45). Regarding the former, the EU27 continues to be the largest supplier among the selected trading partners, despite lower growth rates than the key competitors both comparing the periods before and since the EPA’s start of application and annual growth rates since then (Figure 45a). Regarding electronics, the EU27 were overtaken in 2022 by China (Figure 45b).

Figure 45: Changes in Botswana’s imports from the EU27 and selected other trading partners, selected broad sectors, before and since the EPA start of application, and annual growth 2016-2022



Note: Bubble size refers to import value in 2022

Source: Own calculations based on UN COMTRADE data (Table 32 in Annex).

Positive developments can be observed for agricultural exports, where the EU has performed at least on a part with major competitors, and chemicals, where the EU has overtaken India as a key supplier (and has also outperformed the UK). Textiles have also sharply picked up in 2022, constituting a strong recovery of the declining trends prior to the EPA; average annual growth rates since 2016 have thus been comparable to those of imports from China (and higher than for imports from most other suppliers).

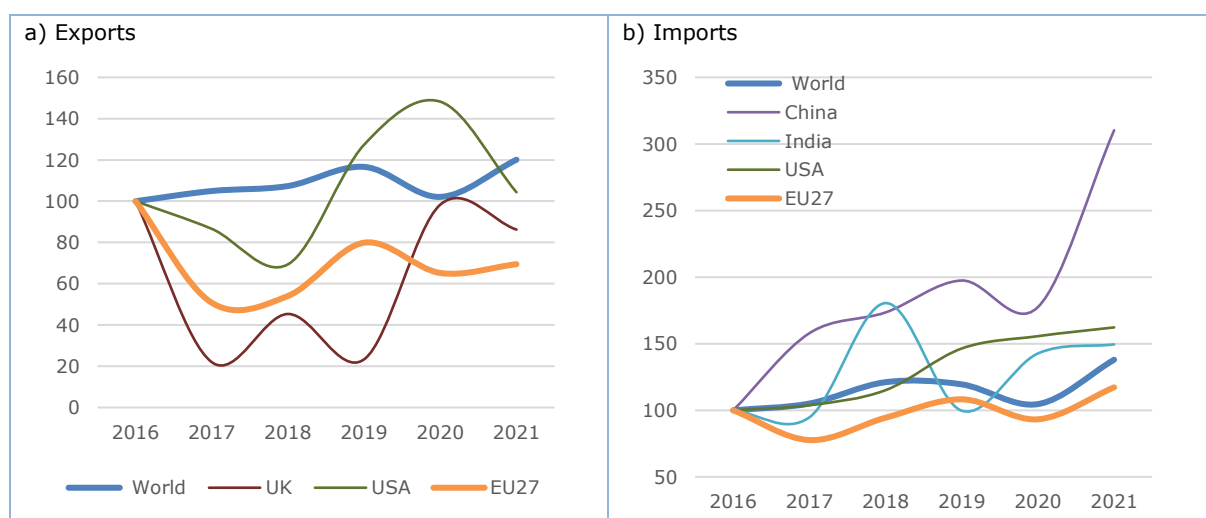
Assessing the contribution of the EPA to the observed trends is difficult: as mentioned, the EPA hardly changed the de facto tariff preferences for EU

exporters that had already existed under the EU-South Africa TDCA because of SACU’s common external tariff. Further analysis is required.

3.3. Comparative review of Eswatini’s trade with the EU

Among the SADC EPA States, Eswatini is the country for which trade relations with the EU are least important: as noted above, only about 5% of Eswatini’s exports are destined for, and imports supplied by, the EU, with stagnating trends over time. Indeed, as Figure 46 shows, from 2016 to 2021⁸ both exports to and imports from the EU underperformed Eswatini’s total exports and imports, as well as trade with other trading partners. Due to the comparatively small levels, the volatility of both export and import values is high. Nevertheless, trade with the EU has consistently underperformed Eswatini’s trade with the United States (both exports and imports) and in particular imports from China. In value terms, the United States remains a smaller partner for Eswatini: in 2021, total exports to the United States amounted to USD 18 million, considerably less than the USD 106 million destined to the EU27 (and also less than the USD 40 million to the UK). With regard to imports, the United States provided USD 32 million in 2021, less than the USD 94 million from the EU27 and USD 57 million from India (but ahead of the USD 11 million from the UK). In contrast to the United States, China has become the major non-African supplier to Eswatini, overtaking the EU27 in 2017 and continuing to expand at high pace. In 2021, imports from China reached USD 206 million, more than twice the value of imports from the EU.

Figure 46: Eswatini’s trade with the EU27 compared with selected other trading partners (index, 2016=100)



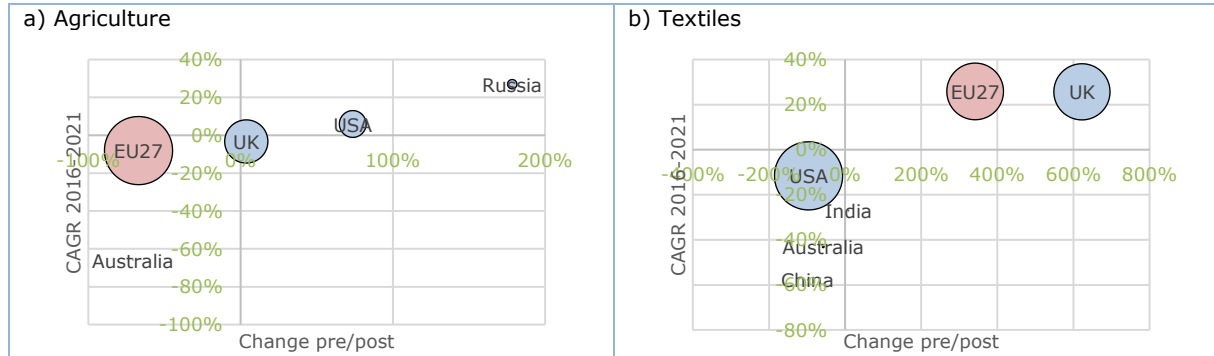
Source: Own calculations based on UN COMTRADE data (Table 29 and Table 30 in Annex).

Across broad sectors, **Eswatini’s exports to the EU** are minimal except for agricultural products, chemicals, and textiles (Table 33 in the Annex). For chemicals, none of the other considered countries is an export market. For agricultural exports, the EU27 constitutes the largest market among the selected countries, but growth rates both before and since the EPA started to be applied and since 2016 annually were lower than exports to the UK and the United States (Figure 47a). With respect to textiles, Eswatini’s exports to the EU and the UK increased strongly, both comparing the pre- and post EPA periods and annual growth since 2016 (with the UK outperforming the EU27 regarding the former), whereas exports to the United States have decreased, notably after 2014. However, export values remain limited, at less than USD 2 million per year, and have stagnated since 2018.

⁸ Data for Eswatini for 2022 are not available in UN COMTRADE.

The non-African countries considered here account for only very small shares of Eswatini’s total exports except for agricultural products, for which the countries combined account for about 20% of the total (see Table 33 in the Annex).

Figure 47: Changes in Eswatini’s exports to the EU27 and selected other trading partners, selected broad sectors, before and since the EPA start of application, and annual growth 2016-2021

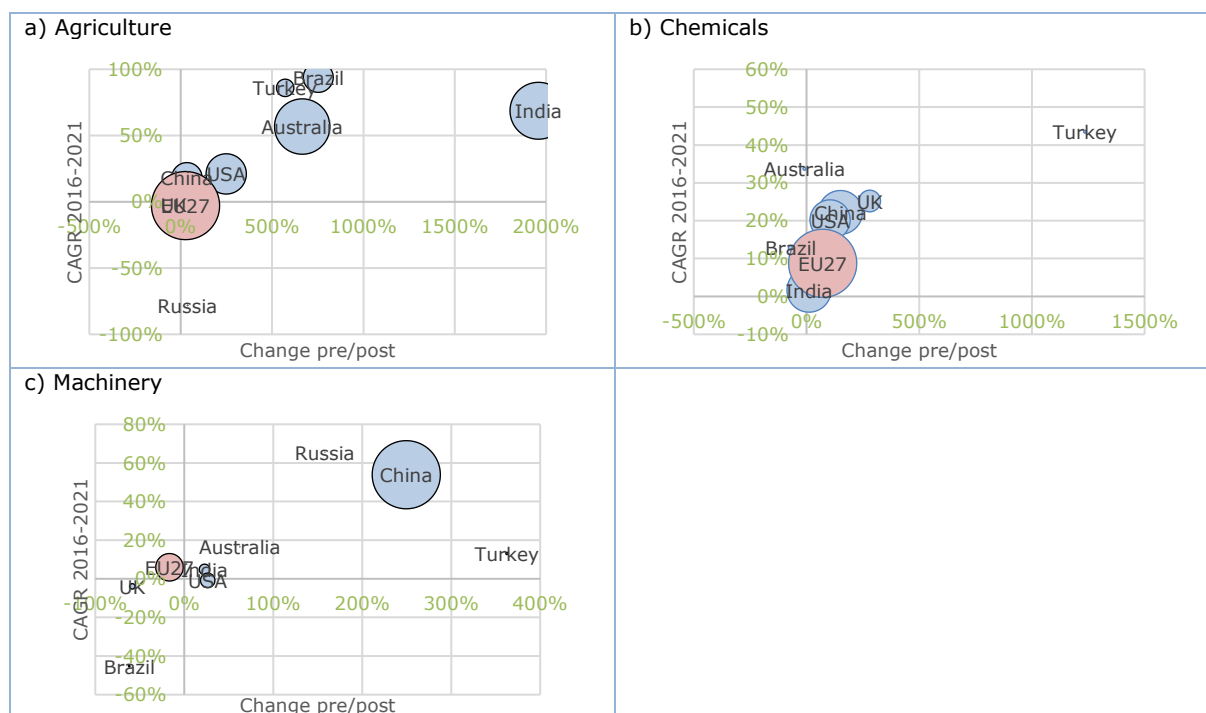


Note: Bubble size refers to export value in 2021

Source: Own calculations based on UN COMTRADE data (Table 32 in Annex).

With respect to **Eswatini’s imports**, China outperformed the EU27 across all sectors (Table 34 in the Annex). Nevertheless, the EU remained a major supplier for Eswatini of agricultural products, chemicals, and machinery. For agricultural products, imports from India and Australia, as well as the United States, China and Brazil, have grown faster than imports from the EU, reaching import values in 2021 that are comparable with those of the EU (Figure 48a) – although it should also be noted that Eswatini’s imports from most of these competitors are extremely volatile. For chemicals (Figure 48b), the EU remains the largest supplier to Eswatini despite slower growth than most other peer countries considered. And for machinery (Figure 48c), because of exceptionally high imports from China in 2021 (USD 64 million, almost five times the previous record), the EU has been replaced as the main machinery supplier among the comparator countries considered – despite a strong recovery of EU machinery exports to Eswatini reaching USD 10 million, the highest value since 2013.

Figure 48: Changes in Eswatini’s imports from the EU27 and selected other trading partners, selected broad sectors, before and since the EPA start of application, and annual growth 2016-2021



Note: Bubble size refers to import value in 2021

Source: Own calculations based on UN COMTRADE data (Table 34 in Annex).

Finally, it should be noted that the selected trading partners together account for only small shares in Eswatini’s imports in most sectors except for chemicals, textiles and machinery (see Table 34 in the Annex); most imports across all sectors originate in South Africa/SACU.

In sum, **despite Eswatini’s market access preferences granted to the EU (which largely continue the de facto liberalisation that had taken place under the EU-South Africa TDCA) EU exports to Eswatini have been outperformed by China in virtually all sectors as well as some other competitors in selected sectors. Conversely, no notable impact is visible of the EPA’s preferential tariffs for Eswatini’s exports in the EU, which largely continued those already existing under the previous unilateral preferences in the EU: exports of textiles performed better than exports to other markets, but exports of agricultural products underperformed.**

3.4. Comparative review of Lesotho’s trade with the EU

As was noted above (section 3.1), the share of **Lesotho’s exports** destined for the EU is highly volatile, and accordingly, the EU’s rank among export markets varied between the first and fifth most important partner. Since 2018, the EU has always been among the top three destinations, changing places with South Africa and the United States – the volatility of exports to these two countries was however considerably lower than that of exports to the EU (Table 13).

Table 13: Main markets for Lesotho’s exports, 2012-2022 (USD million)

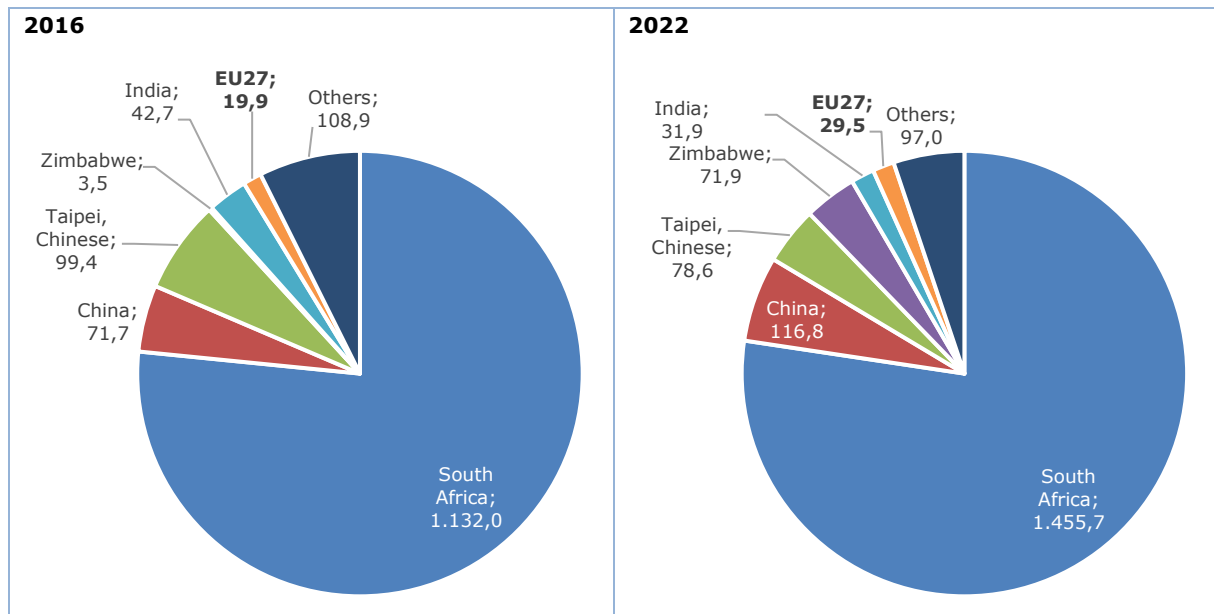
	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
South Africa	320.9	269.9	188.8	169.3	317.0	331.4	256.1	241.7	273.1	379.6	469.2
United States	297.7	53.1	248.0	176.9	287.2	306.2	265.3	245.8	241.4	297.2	236.6
EU27	23.6	16.6	377.3	187.2	3.8	6.7	143.2	117.2	276.6	184.3	180.3
Others	36.0	12.7	5.2	76.5	28.8	29.3	68.5	41.1	27.4	116.6	31.1
Total	678.2	352.4	819.3	609.9	636.8	673.6	733.1	645.8	818.5	977.7	917.2

Source: Own calculations based on ITC TradeMap data.

By broad sector, the EU is the only market for Lesotho’s stone (i.e., diamond exports) but a small export market for other sectors (Table 35 in Annex): agricultural exports to the EU27, although still modest in value terms, have outperformed other major markets both when comparing the pre- and post-EPA periods and annual growth rates 2016 to 2021. The same is true for Lesotho’s textiles exports to the EU.

With regard to **suppliers for Lesotho, the EU’s role** was, and continues to be, limited. As shown above, imports from the EU27 never reached 5% of Lesotho’s total imports, and its rank among Lesotho’s suppliers fluctuated among 4th and 9th position over the years. The vast majority of imports comes from South Africa, and the structure has hardly changed over the years (Figure 49).

Figure 49: Lesotho’s main suppliers, 2016 vs. 2022 (import value in USD million)



Source: Own calculations based on ITC TradeMap data.

Across sectors, the EU’s exports to Lesotho have performed broadly in line with competitors for chemicals (the EU’s most important export) but below average for machinery (especially 2016 to 2021) and agriculture (Table 36).

To summarise, **in the years since the EPA started to be applied, the EU’s importance as a trading partner for Lesotho has not substantially changed. This should not come as a surprise, as market access conditions for bilateral trade in both directions hardly changed because of the EPA, when compared to the previous regimes.**

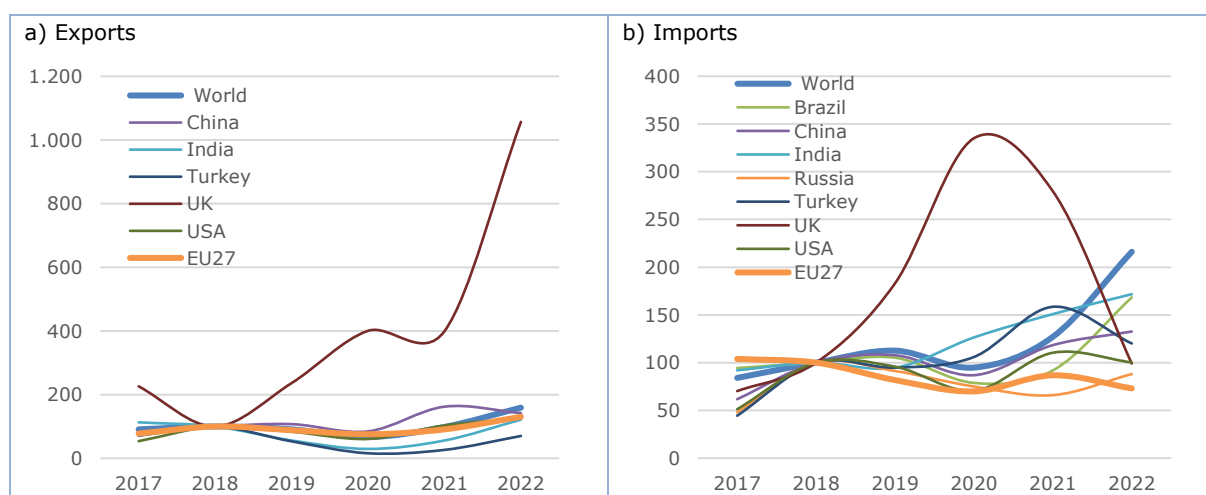
3.5. Comparative review of Mozambique’s trade with the EU

As described in section 3.1, Mozambique is the SADC EPA State for which the EU27 are most important as an export market, although with a somewhat declining trend since 2020. The share of imports from the EU27 has also decreased substantially, reaching less than 10% in 2022. Nevertheless, when looking at trade trends over time comparatively, **Mozambique’s exports to the EU27 have largely performed in line with total exports and other main export markets** (Figure 50a). Only exports to the UK increased substantially faster since 2018 than those to the EU27, and exports to India slightly faster.

Indeed, India overtook the EU27 as the most important export market in 2022, according to ITC TradeMap data (Figure 51a).⁹

Regarding **Mozambique's imports, the EU has underperformed** compared both to total imports and all non-African comparator countries (Figure 50b). Its rank among suppliers dropped from second place (after South Africa) in 2018 to fifth place in 2022, after South Korea (which showed a massive USD 5 billion export in 2022, compared to only a few millions in any other year), South Africa, the UAE, and China, and only slightly ahead of India and Singapore (Figure 51b), both of which had strong growth rates in previous years.

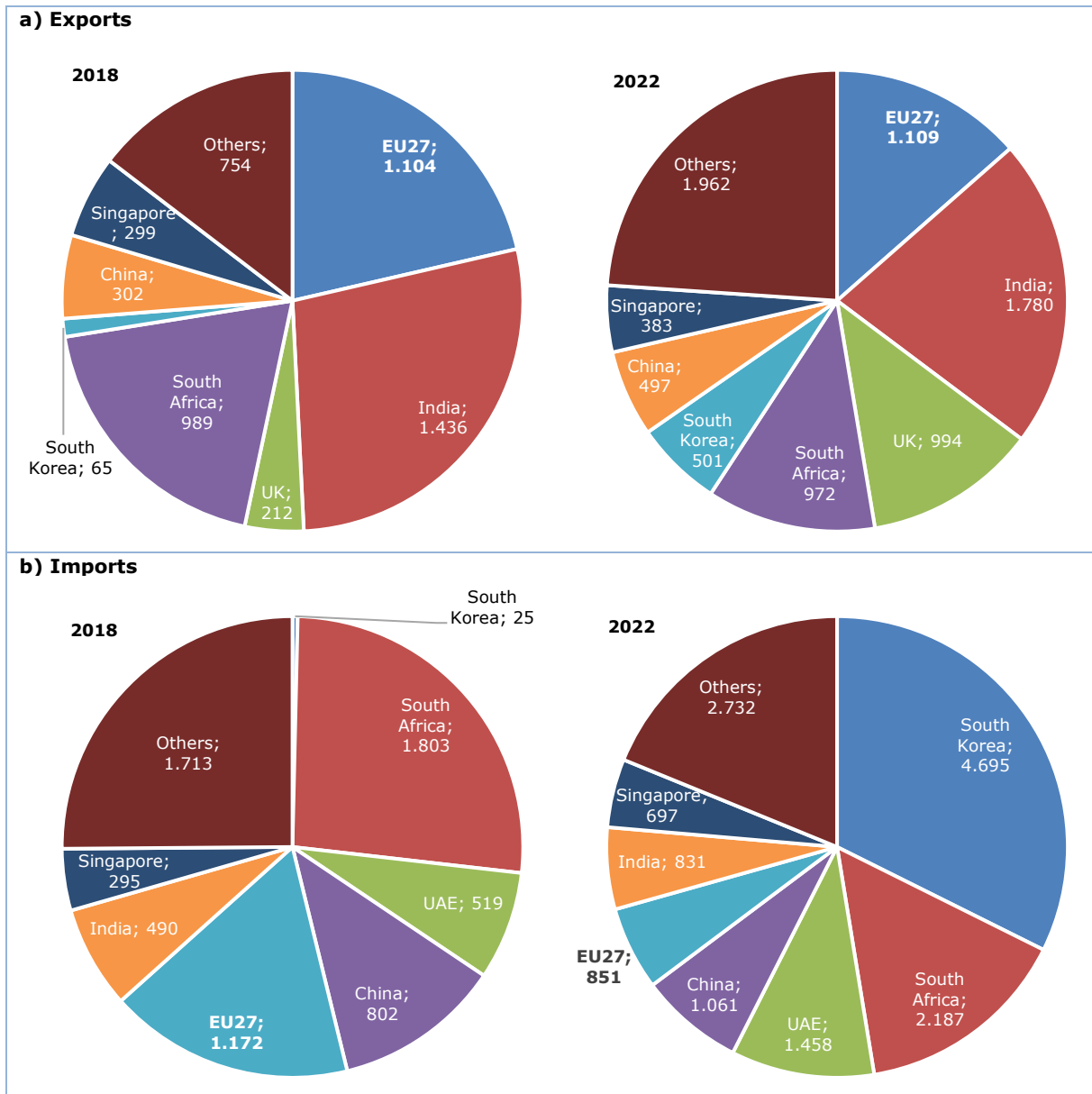
Figure 50: Mozambique's trade with the EU27 compared with selected other trading partners (index, 2018=100)



Source: Own calculations based on UN COMTRADE data (Table 29 and Table 30 in Annex).

⁹ According to Eurostat and UN COMTRADE data, EU imports from Mozambique in 2022 were substantially higher, so that the EU27 would have remained the most important export destination for Mozambique.

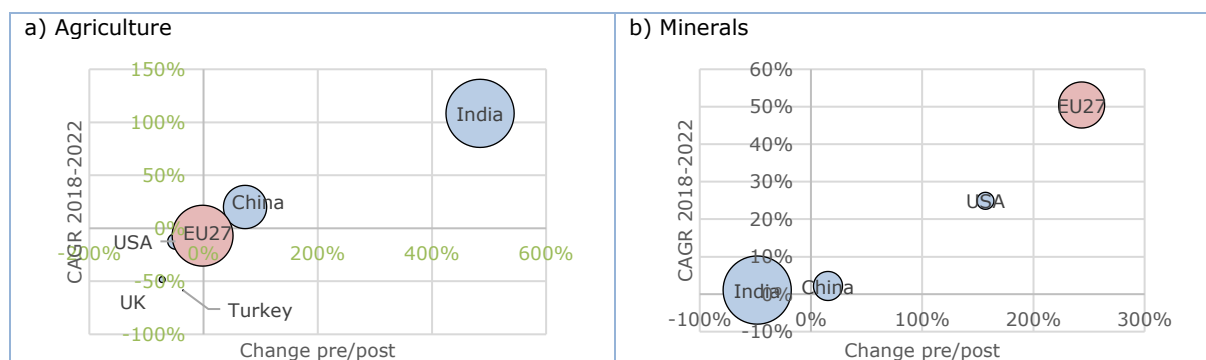
Figure 51: Mozambique’s main trading partners, 2018 vs. 2022 (values in USD million)



Source: Own calculations based on ITC TradeMap data.

Across broad sectors, **Mozambique’s exports to the EU** are very small except for metals, minerals, and agricultural products (Table 37 in the Annex). For metals exports, the EU and UK constitute virtually the only market, with the exports to the UK having been highly volatile over the years, and it therefore being impossible to determine a clear trend. Regarding agriculture and minerals, next to the EU India is the other key market – but with different trends over time: for agricultural products (Figure 52), exports to India have rapidly increased (to USD 259 million in 2022, overtaking the EU), whereas those to the EU have stagnated (and in fact underperformed Mozambique’s total agricultural exports). In contrast, minerals exports to the EU have strongly increased (to USD 668 million in 2022), although being still smaller than those to India (USD 1.4 billion).

Figure 52: Changes in Mozambique’s exports to the EU27 and selected other trading partners, selected broad sectors, before and since the EPA start of application, and annual growth 2018-2022

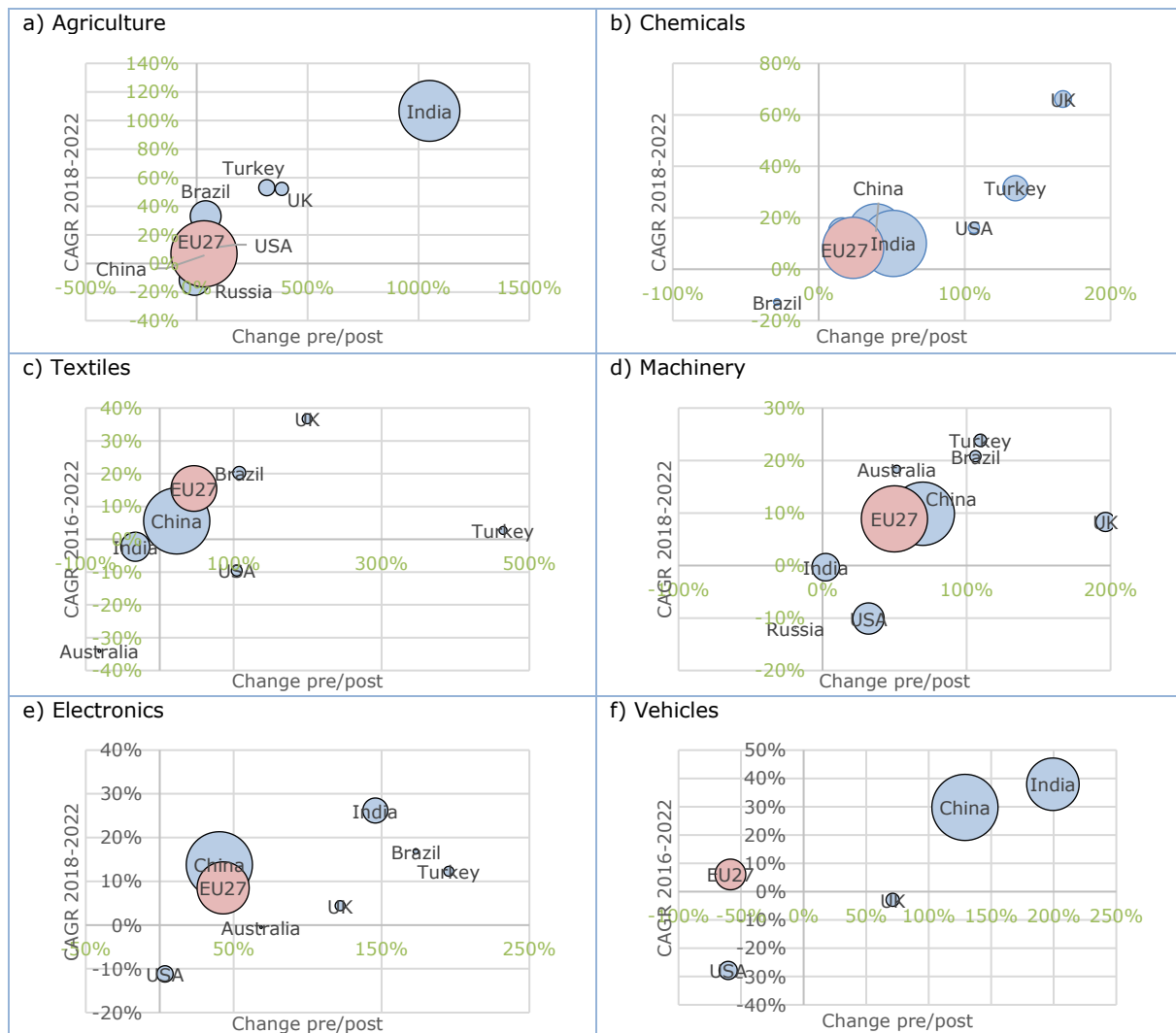


Note: Bubble size refers to export value in 2022

Source: Own calculations based on UN COMTRADE data (Table 37 in Annex).

With respect to **Mozambique’s imports**, the EU27’s performance was quite uneven across sectors (Table 38 in the Annex), but three groups can roughly be distinguished (Figure 53): in e.g. agriculture or vehicles, the EU was vastly outperformed by other supplying countries, notably India (and China for vehicles); but among the comparator countries still remained the most important supplier of agricultural products in 2022 – unlike for vehicles, where the EU is now only a minor player. In chemicals, machinery and electronics, imports from the EU performed almost like those from major competitors. And in textiles, the EU performed better than both China and India, both when comparing the periods before and since the EPA’s start of application, and since 2018 year-on-year.

Figure 53: Changes in Mozambique’s imports from the EU27 and selected other trading partners, selected broad sectors, before and since the EPA start of application, and annual growth 2018-2022



Note: Bubble size refers to import value in 2022
 Source: Own calculations based on UN COMTRADE data (Table 38 in Annex).

In sum, **the EU’s largely constant share in Mozambique’s exports is in line with the fact that EU market access conditions hardly changed under the EPA (and exports under the EBA also still continue); this finding applies both the total exports and those at broad sector level. However, despite the liberalisation provided by Mozambique, EU exports to the country have fallen behind other competitors to the EU, although the performance varies considerably across sectors. Although it has to be acknowledged that the preferences which Mozambique grants to the EU are limited when compared with the other SADC EPA States, and gradual liberalisation has only started, if at all, for many products, the performance of EU exports to Mozambique is an indication that the EPA has so far had little effect in fostering bilateral trade.**

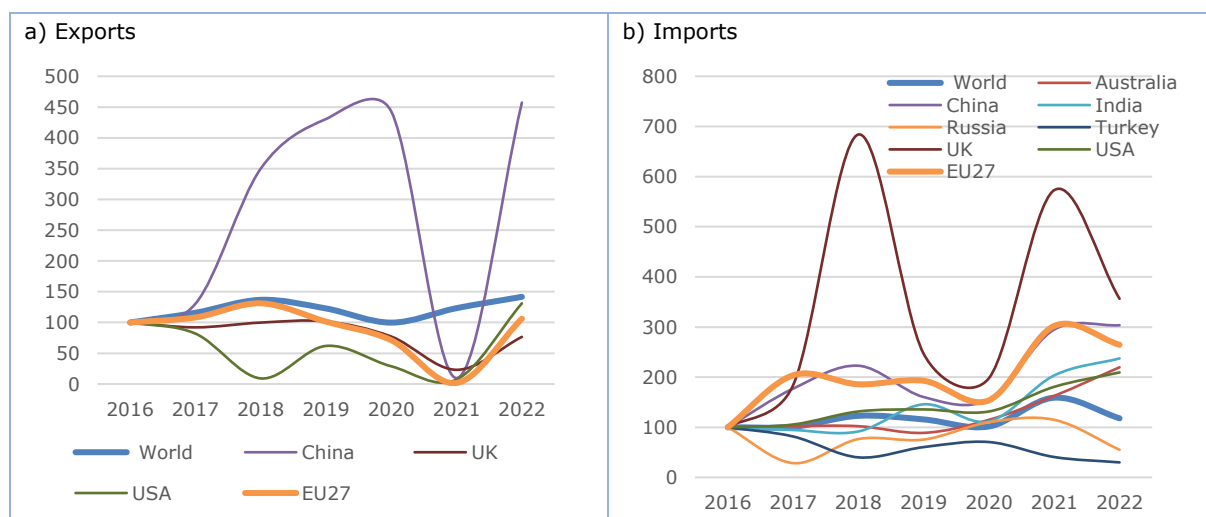
3.6. Comparative review of Namibia’s trade with the EU

Since the EPA started to be applied in 2016, **Namibia’s exports to the EU27** initially performed in line with Namibia’s total exports, but since 2018 fell slightly behind (Figure 54a). The EU’s performance as an export destination has been similar to most other markets considered, with one exception, i.e. China: Namibia’s exports more than

quadrupled between 2016 and 2019 and then stayed at that high level, whereas those to the EU in 2022 were almost the same as in 2016.

Namibia's imports from the EU27, in contrast, performed better than average and also better than most competitors except the UK and China (Figure 54b) – both of these are however small suppliers when compared to the EU: imports from China in 2022 reached USD 599 million, and those from the UK USD 103 (less than Namibia's imports from India or the United States), compared to imports from the EU27 valued close to 1.2 billion (Table 30 in the Annex).

Figure 54: Namibia's trade with the EU27 compared with selected other trading partners (index, 2016=100)

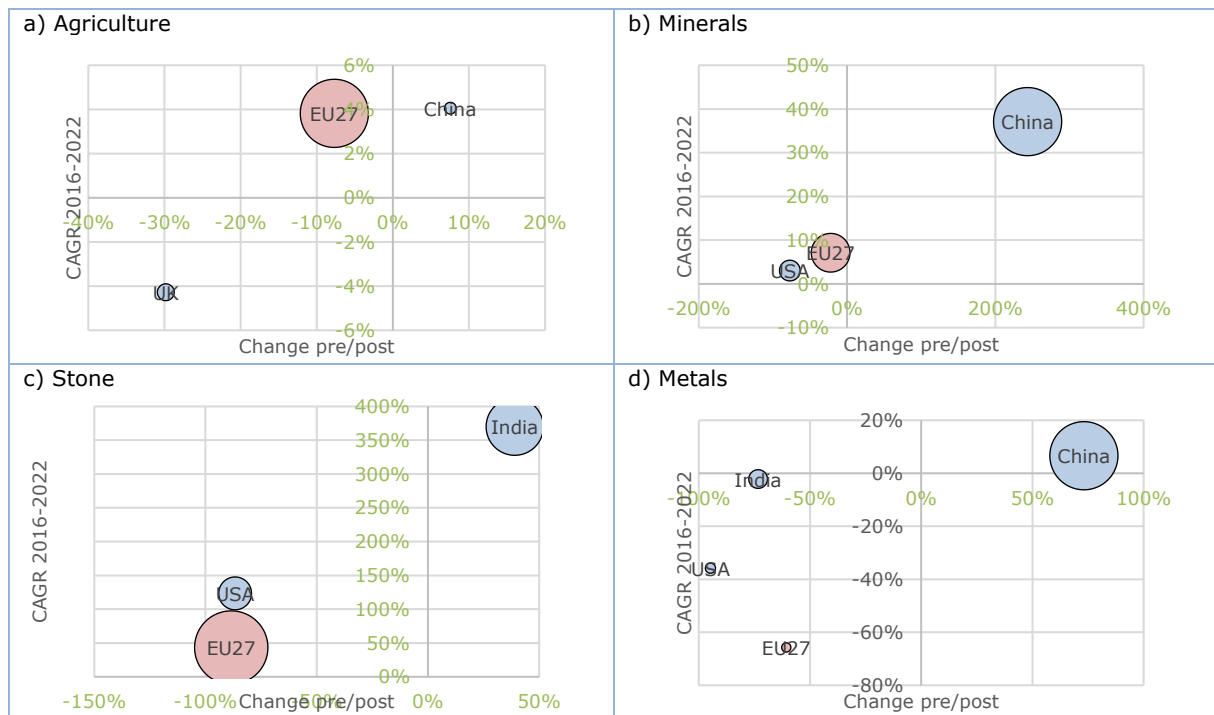


Note: Export values by destination are erroneous and should be ignored.

Source: Own calculations based on UN COMTRADE data (Table 29 and Table 30 in Annex).

Across broad sectors, the **EU27's importance as a destination for Namibia's exports** varies considerably and performed unevenly over time (Table 39 in the Annex). For agricultural products, the EU constitutes the most important market among non-African destinations, and growth has been as high as that of exports to China, since the start of application of the EPA, and clearly outperforming the UK (Figure 55a). For other sectors such as minerals stone and metals (Figure 55b-d), exports to the EU have lost in importance when compared with China or India.

Figure 55: Changes in Namibia’s exports to the EU27 and selected other trading partners, by broad sector, before and since the EPA start of application, and annual growth 2016-2022



Note: Bubble size refers to export value in 2022

Source: Own calculations based on UN COMTRADE data (Table 39 in Annex).

With respect to **Namibia’s imports**, the EU27 constitutes a major supplier, among the comparator countries, across all broad sectors, but performance in terms of changes of import values over time has been average at best (Figure 56): in agriculture, minerals, chemicals growth rates have been largely comparable with competitors – except for much faster growth of Namibian agricultural imports from Brazil and of minerals imports from India. In textiles, metals, machinery and electronics, imports from the EU have fallen behind virtually all competitors, notably China and the United States. China now is the largest supplier in all these sectors except for machinery. Conversely, Namibia’s imports of vehicles from the EU have increased more strongly than from any of the other major comparator countries considered, except for the UK.

Figure 56: Changes in Namibia’s imports from the EU27 and selected other trading partners, by broad sector, before and since the EPA start of application, and annual growth 2016-2022



Note: Bubble size refers to import value in 2022
 Source: Own calculations based on UN COMTRADE data (Table 40 in Annex).

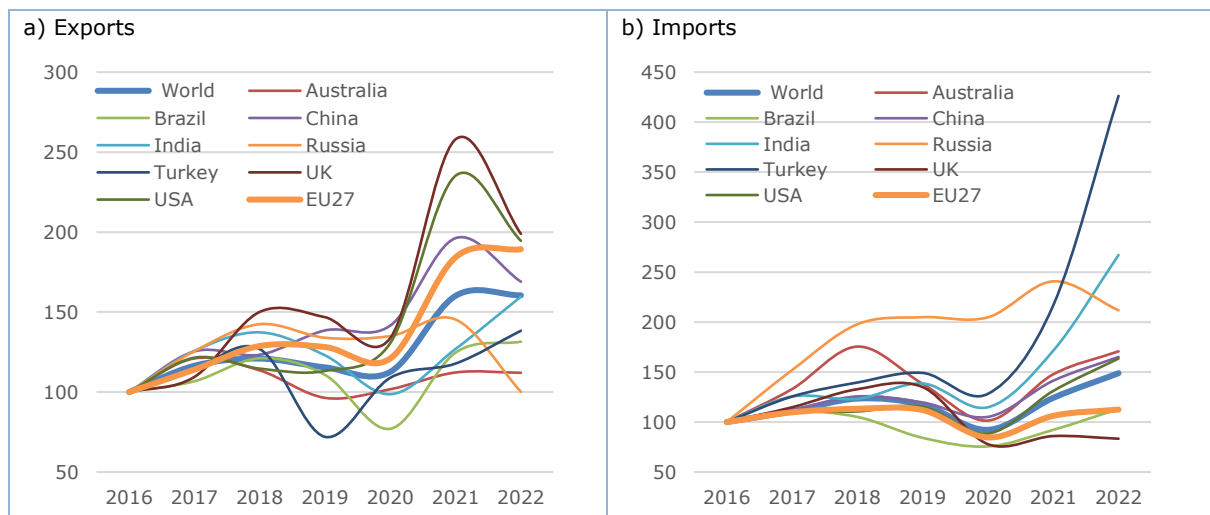
Summarising this comparative review, **developments in Namibia-EU bilateral trade have largely been in line with Namibia’s overall trade pattern and EU competitor countries, except for a stronger performance shown by the UK and especially China. Differences across sectors are large, but there are only two broad sectors in which the EU has performed at least as well as competitors in trade with Namibia since the start of application of the EPA: agricultural exports from Namibia, and vehicles exports from the EU.**

3.7. Comparative review of South Africa’s trade with the EU

Since the EPA started to be applied in 2016, **South Africa’s exports to the EU27** initially performed in line with South Africa’s total exports, but since 2018 performed better than average (Figure 57a). Among the non-African comparator countries considered, only South Africa’s exports to the UK and the United States had increased more between 2016 and 2022 than its exports to the EU27. Exports to China performed similarly as those to the EU, and those to India sharply increased since 2020. Nevertheless, the EU remained the most important destination by far for South Africa’s exports throughout the whole period considered (see Table 29 in the Annex).

In contrast to exports, **South Africa’s imports from the EU27**, not only underperformed the country’s total imports but also those of most comparator countries considered: comparing with the levels in 2016, imports from Turkey, India, Russia, Australia, China, and the United States had increased more by 2022 than those from the EU, and only the index of South Africa’s imports from the UK was below that of imports from the EU27 in 2022 (Figure 57b). Despite the more dynamic performance of imports from other suppliers, the EU27 continued to be the most important supplier for South Africa in 2022, ahead of China and, with a substantial gap, India and the United States (Table 30 in the Annex).

Figure 57: South Africa’s trade with the EU27 compared with selected other trading partners (index, 2016=100)



Source: Own calculations based on UN COMTRADE data (Table 29 and Table 30 in Annex).

Across broad sectors, **South Africa’s exports to the EU** vary considerably, from less than USD 100 million to several billion (Table 41 in the Annex); nevertheless, across all sectors the EU27 were the largest export market in 2022 – despite a diverse track record since 2016, as well as comparing exports before and since the EPA started to be applied (Figure 58): in the minerals, chemicals, metals and vehicles sectors, South Africa’s exports to the EU developed more dynamically than virtually all considered comparator countries. Conversely, the growth rates of South Africa’s exports to most other destinations than the EU were higher – both looking at the years since 2016 and comparing the pre- and post-EPA periods, for agriculture, stone, electronics, and miscellaneous manufactures. Textiles and machinery fall between the two categories. The review also shows that the importance of other export markets varies considerably across sectors, with China and the United States being the second most important market to the EU in most sectors, with India and Australia also being important markets in some sectors. Conversely, exports to Brazil and Russia are very limited across all sectors.

Figure 58: Changes in South Africa’s exports to the EU27 and selected other trading partners, by broad sector, before and since the EPA start of application, and annual growth 2016-2022



Note: Bubble size refers to export value in 2022
 Source: Own calculations based on UN COMTRADE data (Table 41 in Annex).

In contrast to the EU as a market for South Africa's exports, the importance of the **EU27 as a supplier for South Africa** varies considerably across sectors (Figure 59): whereas it remained the most important origin of South Africa's imports in 2022 in agriculture, chemicals, stone, and vehicles, other countries are more important suppliers in the other sectors. This is in particular the case in the textiles (dominated by China), metals and electronics (both led by China, with EU remaining an important supplier), minerals (led by India), and miscellaneous other sectors (led by the United States).

Looking at performance over time, the EU27 has been outperformed both in the comparison of pre- and post-EPA periods and growth rates since 2016 by at least some major competitors in most sectors except agriculture. Notably, higher growth in imports from China has led to taking market shares from the EU in several sectors, including metals, machinery, electronics, and vehicles. Imports from India have also grown particularly strongly in these sectors, although still amounting to lower absolute values.

Figure 59: Changes in South Africa's imports from the EU27 and selected other trading partners, by broad sector, before and since the EPA start of application, and annual growth 2016-2022



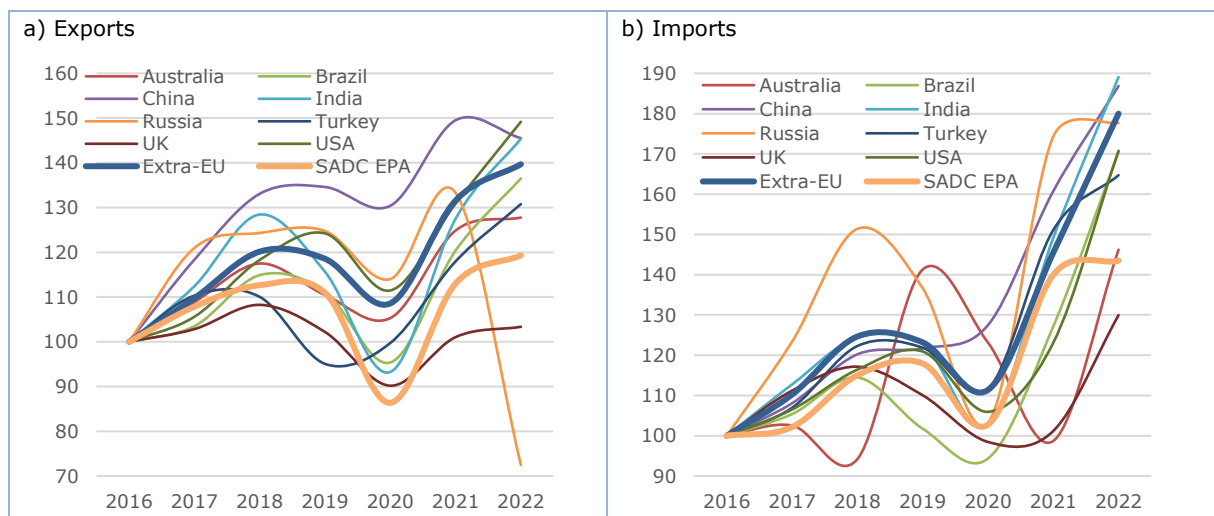
Note: Bubble size refers to import value in 2022
 Source: Own calculations based on UN COMTRADE data (Table 42 in Annex).

3.8. Comparative review of the EU's trade with the SADC EPA States

For the EU27, trade with the SADC EPA States since 2016 has underperformed when compared with most of the EU's key trading partners. **EU exports to the region** (Figure 60a) increased slower in the initial years after 2016 than EU exports to other destinations, except Turkey and the UK, then dropped more than those to other destinations during COVID-19, and the post-COVID recovery in 2021 and 2022, although being strong, did not help to catch up with other export markets, except for the UK post-Brexit and Russia following the start of the war against Ukraine and the associated sanctions imposed by the EU.

A similar development over time is observed for the EU27's imports from the SADC EPA States when compared with other EU trading partners (Figure 60b). Initially after 2016, imports from the Partner countries increased slightly more slowly than those from the other comparator countries, except for Australia. The contraction in 2020 and recovery in 2021 was also roughly in line with most other suppliers, but due to stagnation thereafter, according to the UN COMTRADE data, imports from the SADC EPA States in 2022, when compared to those in 2016, performed worse than those from any of the comparator countries except the UK. It should be noted, however, that data reported by UN COMTRADE differ from those reported by Eurostat, which shows a notable increase in imports in 2022 (see section 1.1). Accordingly more research based on the Eurostat data will still be undertaken.

Figure 60: EU27 trade with SADC EPA States compared with selected other trading partners (index, 2016=100)



Source: Own calculations based on UN COMTRADE data (Table 29 and Table 30 in Annex).

Based on UN COMTRADE data, the review of the performance of EU trade with the SADC EPA States shows that **bilateral trade between the Parties developed less dynamically than what would have been expected from the EPA. While it is true that market access conditions in the EU for the SADC EPA States did not improve substantially compared to the preceding EU trade regimes, imports from the partner countries should have developed in line with the EU's total imports and other main supplier to the EU. Actual trends show that imports developed slightly below average. Regarding the EU's exports to the partner countries, as a result of the actual gradual liberalisation of market access to Mozambique, an above-average development would have been expected, considering that the market access for EU exports to the other countries considered did not change. Instead, EU exports to the SADC EPA States were less dynamic than those to most other destinations.**

4. TOP IMPORT AND EXPORT PRODUCTS BETWEEN THE EU AND SADC EPA STATES

In this section, we complement the sectoral trade patterns between the EU27 and the SADC EPA partners as described in section 2 above by providing the top import and export products as the product level (HS 6-digit level), based on Eurostat COMEXT data. Considering the strong differences in trade patterns across SADC EPA States, we only describe the EU's trade with the six SADC EPA States individually, noting that the combined region-to-region trade is strongly influenced by EU-South Africa trade.

4.1. EU-Botswana trade

As already noted in section 2.2, bilateral trade between the EU and Botswana is highly concentrated on diamonds. These – in both unworked (HS 710231) and worked form (HS 710239) – account for about half of all **EU exports to Botswana** in value terms (Table 14), with an increasing tendency. Other important exports in the EPA period were special purpose vehicles, vaccines and medicaments, and various types of electrical and electronic equipment. It is however very difficult to establish trends for non-diamond exports, as the average values across the pre-EPA and EPA periods often depend on high exports in individual years. This is the case for example for special purpose motor vehicles (exports of €71 million in 2019, but zero in 2022) and vaccines (€36 million in 2021, in most other years €3 million and less).

Table 14: Top 20 EU exports to Botswana since the start of application of the EPA, average values per year (€ million), shares in total, and changes over time

	Av 2011-16	Av 2017-22	Share 2011-16	Share 2017-22	Change pre-post	CAGR 2016-22	Rank pre-EPA
1 710231 Non-industrial diamonds unworked or simply sawn	80.6	187.7	40.0%	47.4%	133%	6%	1
2 870590 Special purpose motor vehicles (other than those	0.1	19.0	0.0%	4.8%	21312%	-100%	162
3 710239 Diamonds, worked, but not mounted or set (excl.	10.4	15.0	5.2%	3.8%	45%	15%	2
4 300220/41 Vaccines for human medicine	1.8	9.8	0.9%	2.5%	438%	35%	15
5 853890 Parts suitable for use solely or principally with the	4.1	9.0	2.0%	2.3%	121%	-3%	6
6 853690 Electrical apparatus for switching electrical circuit	4.8	7.3	2.4%	1.8%	54%	2%	5
7 854442 Electric conductors for a voltage <= 1.000 V, insu	3.9	6.9	1.9%	1.8%	78%	4%	8
8 854449 Electric conductors, for a voltage <= 1.000 V, insu	2.6	6.7	1.3%	1.7%	153%	21%	12
9 300490 Medicaments consisting of mixed or unmixed prod	6.6	6.6	3.3%	1.7%	-1%	-17%	4
10 271012 Light oils and preparations, of petroleum or bitum	0.0	5.7	0.0%	1.4%	127109%	515%	643
11 880230 Aeroplanes and other powered aircraft of an unla	0.5	5.7	0.3%	1.4%	1021%	..	43
12 854720 Insulating fittings for electrical purposes, of plast	6.9	4.5	3.4%	1.1%	-36%	-9%	3
13 99CCC0 Corrections due to erroneous codes belonging to	0.1	4.3	0.1%	1.1%	3594%	-77%	134
14 851762 Machines for the reception, conversion and trans	3.3	3.1	1.6%	0.8%	-5%	-3%	10
15 730810 Bridges and bridge-sections, of iron or steel	0.0	2.6	0.0%	0.6%	106866%	..	768
16 903190 Parts and accessories for instruments, appliances	0.5	2.2	0.2%	0.6%	395%	-4%	49
17 854420 Coaxial cable and other coaxial electric conductor	1.7	2.2	0.8%	0.6%	29%	2%	17
18 903120 Test benches for motors, generators, pumps, etc.	0.1	2.0	0.0%	0.5%	3451%	..	224
19 847150 Processing units for automatic data-processing m	0.7	1.9	0.3%	0.5%	179%	15%	31
20 382200 Diagnostic or laboratory reagents on a backing, p	0.8	1.6	0.4%	0.4%	93%	-100%	25
Others & not specified	71.8	92.3	35.7%	23.3%	28%	..	..
Total	201.3	396.0	100%	100%	97%	5%	

Source: Own calculations based on Eurostat COMEXT data.

EU imports from Botswana to more than 95% consist of diamonds (about 85% unworked, and 10% worked) (Table 15). Fresh and frozen beef, along with some modest exports of live plants, are the only agricultural products among the top 20 imports. Beef, in particular, has been Botswana's most important export to the EU over time apart from diamonds but have also been uneven over the years, depending mostly on climatic conditions and the absence of diseases. Nickel mattes used to be another important export from Botswana to the EU, reaching €125 million in 2016 but then stopped when the nickel mine was closed.

Table 15: Top 20 EU imports from Botswana since the start of application of the EPA, average values per year (€ million), shares in total, and changes over time

	Av 2011-16	Av 2017-22	Share 2011-16	Share 2017-22	Change pre-post	CAGR 2016-22	Rank pre-EPA
1 710231 Non-industrial diamonds unworked or simply sawn	875.5	1,007.7	83.1%	86.7%	15%	-8%	1
2 710239 Diamonds, worked, but not mounted or set (excl.	124.8	126.7	11.8%	10.9%	2%	16%	2
3 020130 Fresh or chilled bovine meat, boneless	5.3	5.4	0.5%	0.5%	2%	-100%	4
4 270112 Bituminous coal, whether or not pulverised, non-a	0.0	5.3	0.0%	0.5%	..	..	459
5 710221 Industrial diamonds unworked or simply sawn, cle	1.7	3.4	0.2%	0.3%	102%	18%	6
6 020230 Frozen, boneless meat of bovine animals	2.2	2.9	0.2%	0.3%	33%	-6%	5
7 260300 Copper ores and concentrates	1.6	2.6	0.1%	0.2%	70%	352%	7
8 880230 Aeroplanes and other powered aircraft of an unla	0.0	2.0	0.0%	0.2%	..	..	459
9 710210 Diamonds, unsorted	0.3	1.9	0.0%	0.2%	539%	-100%	8
10 711292 Waste and scrap of platinum, incl. metal clad wit	0.0	0.8	0.0%	0.1%	..	..	459
11 270119 Coal, whether or not pulverised, non-agglomerate	0.0	0.6	0.0%	0.1%	..	..	459
12 121190 Plants, parts of plants, incl. seeds and fruits, use	0.0	0.2	0.0%	0.0%	7468%	..	96
13 99RRR1 Returned goods, not elsewhere classified	0.2	0.1	0.0%	0.0%	-1%	15%	11
14 903090 Parts and accessories for instruments and appara	0.0	0.1	0.0%	0.0%	2314%	-100%	87
15 060290 Live plants, incl. their roots, and mushroom spaw	0.0	0.1	0.0%	0.0%	..	..	459
16 851762 Machines for the reception, conversion and trans	0.1	0.1	0.0%	0.0%	-4%	35%	17
17 730890 Structures and parts of structures, of iron or steel	0.0	0.1	0.0%	0.0%	..	..	459
18 880320 Under-carriages and parts thereof, for aircraft, n.e	0.0	0.1	0.0%	0.0%	200%	-100%	28
19 880310 Propellers and rotors and parts thereof, for airraf	0.1	0.1	0.0%	0.0%	-43%	-100%	13
20 843143 Parts for boring or sinking machinery of subheadir	0.0	0.1	0.0%	0.0%	1997%	-100%	92
<i>Others & not specified</i>	<i>41.8</i>	<i>1.6</i>	<i>4.0%</i>	<i>0.1%</i>	<i>-96%</i>	<i>..</i>	
Total	1,053.4	1,161.7	100%	100%	10%	-6%	

Source: Own calculations based on Eurostat COMEXT data.

In sum, **the large majority of bilateral trade in value terms – diamonds – is independent from the EPA, as it takes place under MFN zero duties. Nevertheless, Botswana’s beef exports to the EU, and EU exports to Botswana of various electrical components would face duties in the absence of the EPA. Further analysis into the actual importance of the EPA for bilateral trade in these products will be undertaken.**

4.2. EU-Eswatini trade

As already noted, **EU exports to Eswatini** (Table 16) are relatively diversified across very different product groups: the top five are odoriferous substances, wooden furniture, wine, vaccines and caffeine. In contrast, the EU’s typical main exports – machinery and equipment, vehicles – were not among the top 20 exports since the EPA started to be applied. It should be noted, however, that for most products the levels are so limited that fluctuations in the composition of the top products are quite high, as individual transaction can easily influence annual totals.

Table 16: Top 20 EU exports to Eswatini since the start of application of the EPA, average values per year (€ million), shares in total, and changes over time

	Av 2011-16	Av 2017-22	Share 2011-16	Share 2017-22	Change pre-post	CAGR 2016-22	Rank pre-EPA
1 330210 Mixtures of odoriferous substances and mixtures,	3.4	8.3	12.4%	21.3%	143%	-8%	1
2 940360 Wooden furniture (excl. for offices, kitchens and b	2.8	3.6	10.1%	9.1%	28%	-7%	2
3 220421 Wine of fresh grapes, incl. fortified wines, and gr	1.2	1.8	4.4%	4.7%	50%	5%	4
4 300220/41 Vaccines for human medicine	0.4	1.6	1.4%	4.1%	301%	16%	14
5 293930 Caffeine and its salts	0.5	1.4	1.9%	3.7%	173%	31%	9
6 382200/19 Diagnostic or laboratory reagents on a backin	0.5	1.0	1.7%	2.6%	108%	8%	11
7 290532 Propylene glycol "propane-1,2-diol"	0.1	1.0	0.5%	2.5%	568%	21%	38
8 300490 Medicaments consisting of mixed or unmixed prod	1.4	1.0	5.1%	2.4%	-33%	-36%	3
9 940690 Prefabricated buildings, whether or not complete	0.0	0.8	0.0%	2.0%	..	..	871
10 49SSS9 Confidential trade of chapter 49 and SITC section	0.7	0.7	2.6%	1.7%	-7%	..	5
11 392410 Tableware and kitchenware, of plastics	0.6	0.6	2.3%	1.6%	2%	-7%	6
12 39SSS5 Confidential trade of chapter 39 and SITC section	0.1	0.6	0.4%	1.6%	455%	..	49
13 130120 Natural gum Arabic	0.5	0.6	2.0%	1.5%	6%	-2%	8
14 710813 Gold, incl. gold plated with platinum, in semi-mar	0.1	0.6	0.2%	1.4%	833%	..	74
15 441820 Doors and their frames and thresholds, of wood	0.0	0.6	0.0%	1.4%	..	..	871
16 2939S5 Confidential trade of heading 2939 and SITC secti	0.4	0.5	1.4%	1.2%	20%	-16%	15
17 293499 Nucleic acids and their salts, whether or not chern	0.5	0.4	1.8%	1.1%	-13%	-100%	10
18 391231 Carboxymethylcellulose and its salts, in primary f	0.1	0.4	0.3%	1.1%	422%	35%	63
19 271019 Medium oils and preparations, of petroleum or bit	0.6	0.4	2.2%	1.0%	-33%	-16%	7
20 280920 Phosphoric acid; polyphosphoric acids, whether or	0.1	0.4	0.5%	1.0%	223%	-5%	42
<i>Others & not specified</i>	<i>13.4</i>	<i>12.9</i>	<i>48.7%</i>	<i>33.0%</i>	<i>-4%</i>	<i>..</i>	
Total	27.5	39.1	100%	100%	42%	0%	

Source: Own calculations based on Eurostat COMEXT data.

EU imports from Eswatini are dominated by cane sugar (HS codes 170111/14 and 170199), despite the strong decrease over time, by more than 50%, from €110 million and €9.5 million per year over the period 2011 to 2016, to €47.8 million and €0.4 million per year over the period 2017 to 2022 (Table 17). In contrast, imports of rum and spirits from Eswatini increased strongly, from €0.9 million annually to €4.1 million. Mixtures of odoriferous substances as well as chemical preparations also performed well, whereas the various fruit (grapefruit, pineapples, oranges, avocados) and their juices and preparations mostly stagnated, when comparing import values before and after the EPA started to be applied.

Table 17: Top 20 EU imports from Eswatini since the start of application of the EPA, average values per year (€ million), shares in total, and changes over time

	Av 2011-16	Av 2017-22	Share 2011-16	Share 2017-22	Change pre-post	CAGR 2016-22	Rank pre-EPA
1 170111/14 Raw cane sugar, in solid form, not containing	110.5	47.8	75.7%	66.8%	-57%	-8%	1
2 330210 Mixtures of odoriferous substances and mixtures,	3.3	4.4	2.3%	6.2%	33%	-5%	4
3 220840 Rum and other spirits obtained by distilling ferme	0.9	4.1	0.6%	5.7%	359%	22%	10
4 38249x Chemical products and preparations of the chemi	2.6	2.8	1.8%	3.9%	9%	7%	7
5 080540 Fresh or dried grapefruit	3.2	1.8	2.2%	2.5%	-44%	-27%	6
6 220710 Undenatured ethyl alcohol, of actual alcoholic stre	3.9	1.6	2.6%	2.2%	-59%	-7%	3
7 200820 Pineapples, prepared or preserved, whether or no	1.1	1.1	0.7%	1.5%	0%	12%	9
8 080510 Fresh or dried oranges	3.3	0.9	2.2%	1.3%	-72%	-100%	5
9 200830 Citrus fruit, prepared or preserved, whether or no	1.4	0.6	1.0%	0.8%	-59%	-17%	8
10 200949 Pineapple juice, unfermented, Brix value > 20 at	0.5	0.6	0.3%	0.8%	13%	10%	13
11 200897 Mixtures of fruits, nuts and other edible parts of p	0.1	0.5	0.0%	0.7%	667%	13%	25
12 080440 Fresh or dried avocados	0.2	0.5	0.1%	0.6%	194%	6%	17
13 170199 Cane or beet sugar and chemically pure sucrose, i	9.5	0.4	6.5%	0.5%	-96%	-76%	2
14 200929 Grapefruit juice, unfermented, Brix value > 20 at	0.7	0.3	0.5%	0.4%	-57%	-21%	11
15 85414x Photosensitive semiconductor devices, incl. photo	0.0	0.2	0.0%	0.3%	22015%	233%	159
16 842952 Self-propelled mechanical shovels, excavators and	0.0	0.2	0.0%	0.3%	..	..	558
17 850440 Static converters	0.0	0.1	0.0%	0.2%	1443%	40%	68
18 293722 Halogenated derivatives of corticosteroidal hormo	0.0	0.1	0.0%	0.1%	..	..	558
19 080550 Fresh or dried lemons "Citrus limon, Citrus limonu	0.0	0.1	0.0%	0.1%	..	..	558
20 340600 Candles, tapers and the like	0.1	0.1	0.1%	0.1%	-36%	-3%	20
<i>Others & not specified</i>	4.8	3.5	3.3%	4.9%	-27%	..	..
Total	146.0	71.6	100%	100%	-51%	-5%	

Source: Own calculations based on Eurostat COMEXT data.

The main development over time is the **decline of cane sugar imports from Eswatini to the EU (as well as the corresponding decline in imports of ethyl alcohol); this requires further investigations into the reasons and the potential role that the EPA may have played. Similarly, the stagnation of citrus and other fruit imports, as well as the increase in rum/spirit imports remain to be further analysed.**

4.3.EU-Lesotho trade

Given the small **EU exports to Lesotho**, the leading products vary considerably from year to year. Indeed, the only products that were consistently exported at values of at least €0.1 million per year both before and since the EPA stated to be applied were printed matter, various medical products, and worn clothing (Table 18).

Table 18: Top 20 EU exports to Lesotho since the start of application of the EPA, average values per year (€ million), shares in total, and changes over time

	Av 2011-16	Av 2017-22	Share 2011-16	Share 2017-22	Change pre-post	CAGR 2016-22	Rank pre-EPA
1 300220/41 Vaccines for human medicine	0.23	1.94	2.3%	16.4%	759%	25%	9
2 491199 Printed matter, n.e.s.	0.83	0.81	8.4%	6.8%	-3%	-14%	1
3 845612 Machine tools for working any material by removal	0.00	0.65	0.0%	5.5%	..	..	579
4 100199 Wheat and meslin (excl. seed for sowing, and dur	0.00	0.63	0.0%	5.3%	..	..	579
5 630900 Worn clothing and clothing accessories, blankets	0.11	0.50	1.1%	4.3%	357%	18%	24
6 382200/13/19 Diagnostic or laboratory reagents on a bac	0.12	0.50	1.2%	4.2%	312%	25%	23
7 300490 Medicaments consisting of mixed or unmixed proc	0.69	0.42	6.9%	3.5%	-39%	-22%	3
8 300420 Medicaments containing antibiotics, put up in me	0.15	0.41	1.5%	3.5%	181%	-44%	17
9 844849 Parts and accessories of weaving machines "loom	0.05	0.37	0.5%	3.1%	687%	39%	39
10 847150 Processing units for automatic data-processing m	0.09	0.29	0.9%	2.5%	240%	107%	31
11 495559 Confidential trade of chapter 49 and SITC section	0.00	0.29	0.0%	2.5%	..	..	573
12 902214 Apparatus based on the use of X-rays, for medica	0.00	0.21	0.0%	1.8%	..	..	579
13 940690 Prefabricated buildings, whether or not complete	0.00	0.19	0.0%	1.6%	..	..	579
14 844630 Weaving machines for weaving fabrics of a width	0.00	0.17	0.0%	1.5%	..	..	579
15 392690 Articles of plastics and articles of other materials	0.02	0.17	0.2%	1.5%	988%	1%	76
16 283110 Dithionite and sulfoxylate of sodium	0.22	0.17	2.3%	1.4%	-26%	-5%	10
17 300660 Chemical contraceptive preparations based on hor	0.18	0.16	1.8%	1.3%	-12%	-28%	13
18 210690 Food preparations, n.e.s.	0.01	0.14	0.1%	1.2%	1155%	27%	94
19 901890 Instruments and appliances used in medical, surg	0.12	0.13	1.2%	1.1%	5%	94%	22
20 847290 Office machines, n.e.s.	0.05	0.12	0.5%	1.0%	138%	..	37
<i>Others & not specified</i>	<i>7.06</i>	<i>3.58</i>	<i>71.1%</i>	<i>30.2%</i>	<i>-49%</i>	<i>..</i>	<i>..</i>
Total	9.9	11.9	100%	100%	20%	5%	

Source: Own calculations based on Eurostat COMEXT data.

As noted in section 2.4, **EU imports from Lesotho** to more than 95% consist of diamonds. However, the value and share of worked diamonds increased strongly, from €0.2 million (0.1% of total EU imports from Lesotho) per year in the period 2011 to 2016 to €12.1 million (4.3%) in the EPA period; indicative of an increase in value addition (Table 19). Also, exports of women's trousers (as well as some other garment products) started in 2016 and reached a sizeable average value of €3.4 million during the period 2017 to 2022. However, these exports reached a peak of €6.4 million in 2020 and thereafter dropped again to about €2 million in 2022.

Another product group that saw increasing exports from Lesotho to the EU were dried fruit (HS 081340), plants used for perfumery, pharmaceutical and similar purposes (HS 121190) and some other agricultural products. These were consistently exported to the EU and reached values of about €1 million on average in the EPA period.

Table 19: Top 20 EU imports from Lesotho since the start of application of the EPA, average values per year (€ million), shares in total, and changes over time

	Av 2011-16	Av 2017-22	Share 2011-16	Share 2017-22	Change pre-post	CAGR 2016-22	Rank pre-EPA
1 710231 Non-industrial diamonds unworked or simply sawn	223.8	262.0	99.1%	91.9%	17%	4%	1
2 710239 Diamonds, worked, but not mounted or set (excl.	0.21	12.13	0.1%	4.3%	5731%	266%	5
3 710221 Industrial diamonds unworked or simply sawn, cle	0.00	4.44	0.0%	1.6%	99289%	..	30
4 610463 Women's or girls' trousers, bib and brace overalls	0.12	3.41	0.1%	1.2%	2736%	19%	6
5 081340 Dried peaches, pears, papaws "papayas", tamarin	0.63	1.14	0.3%	0.4%	81%	-5%	2
6 121190 Plants, parts of plants, incl. seeds and fruits, use	0.22	0.98	0.1%	0.3%	349%	28%	4
7 121299 Fruit stones and kernels and other vegetable proc	0.01	0.24	0.0%	0.1%	1647%	36%	18
8 610520 Men's or boys' shirts of man-made fibres, knitted	0.05	0.14	0.0%	0.1%	210%	-18%	8
9 110630 Flour, meal and powder of produce of chapter 8 "E	0.00	0.14	0.0%	0.0%	..	..	172
10 610990 T-shirts, singlets and other vests of textile mater	0.01	0.11	0.0%	0.0%	688%	13%	17
11 620530 Men's or boys' shirts of man-made fibres (excl. kn	0.02	0.07	0.0%	0.0%	225%	-30%	12
12 853620 Automatic circuit breakers for a voltage <= 1.000	0.05	0.05	0.0%	0.0%	3%	-5%	10
13 611030 Jerseys, pullovers, cardigans, waistcoats and simi	0.01	0.05	0.0%	0.0%	675%	11%	27
14 130219 Vegetable saps and extracts (excl. liquorice, hops	0.00	0.04	0.0%	0.0%	..	..	172
15 841229 Hydraulic power engines and motors (excl. hydrau	0.00	0.03	0.0%	0.0%	..	..	172
16 610620 Women's or girls' blouses, shirts and shirt-blouse	0.01	0.03	0.0%	0.0%	89%	-10%	16
17 847170 Storage units for automatic data-processing mach	0.01	0.02	0.0%	0.0%	50%	-19%	20
18 842139 Machinery and apparatus for filtering or purifying	0.00	0.01	0.0%	0.0%	..	..	172
19 120999 Seeds, fruits and spores, for sowing (other)	0.00	0.01	0.0%	0.0%	52355%	..	119
20 901320 Lasers (excl. laser diodes)	0.00	0.01	0.0%	0.0%	..	..	172
<i>Others & not specified</i>	<i>0.74</i>	<i>0.15</i>	<i>0.3%</i>	<i>0.1%</i>	<i>-80%</i>	<i>..</i>	<i>..</i>
Total	225.9	285.2	100%	100%	26%	6%	

Source: Own calculations based on Eurostat COMEXT data.

To summarise, **most EU export products are traded on an ad hoc basis. The few consistent exports are driven by factors other than the EPA – for medical**

products, e.g. increasing demand resulting from COVID-19. Similarly, the vast bulk of EU imports from Lesotho – diamonds in various forms – are not affected by the EPA, as they are duty-free under MFN anyway. However, the increase in imports of selected garments and agricultural products could be related to the EPA; this remains to be further studied, including through consultations with stakeholders.

4.4. EU-Mozambique trade

The **EU's top exports to Mozambique** since the EPA's start of application were fuels, wheat, vaccines, diagnostic reagents, metal tubes, and frozen poultry (Table 20). Fuels were hardly exported until 2018 but since then in sizable quantities, on average €107.5 million per year in the period 2019 to 2022, although tariff liberalisation will be phased in only six years after the start of application. Wheat exports also showed solid growth and continued to be the second most important export product (€43.6 million); liberalisation will only start in 2025. In relative terms, metal tubes (from €0.1 million before to €18.6 million since the EPA start, a 127-fold increase) and poultry (13-fold increase, from €0.8 million to €11.2 million) increased strongest among the top ten products. In the case of metal tubes, tariffs on which were phased out until 2023, this was however entirely due to exports of about €74 million in a single year, 2021. For poultry, tariff liberalisation has not yet started.

Generally, the composition of the EU's top exports to Mozambique changed quite substantially over time (see last column in Table 20). Exports of some other products decreased substantially, comparing the periods before and since the EPA start: among the leading exports in the period 2013 to 2018, vessels (HS 890690, HS 890200) almost vanished, and yearly average exports of self-propelled mechanical shovels (HS 842952), medicaments (HS 300490), chemical contraceptive preparations (HS 300660), and medium petroleum oils (HS 271019) decreased by more than 50%.

Table 20: Top 20 EU exports to Mozambique since the start of application of the EPA, average values per year (€ million), shares in total, and changes over time

	Av 2013-18	Av 2019-22	Share 2013-18	Share 2019-22	Change pre-post	CAGR 2018-22	Rank pre-EPA
1 271011/12 Light oils and preparations, of petroleum or bit	14.9	107.5	2.0%	14.0%	622%	20%	4
2 10019x Wheat and meslin (excl. durum wheat)	32.9	43.6	4.5%	5.7%	33%	30%	2
3 300220/41 Vaccines for human medicine	17.0	28.1	2.3%	3.7%	65%	16%	3
4 382200/11/19 Diagnostic or laboratory reagents on a back	11.0	24.7	1.5%	3.2%	126%	12%	9
5 830710 Flexible tubing of iron or steel, with or without fit	0.1	18.6	0.0%	2.4%	12746%	-5%	603
6 285559 Confidential trade of chapter 28 and SITC section	3.9	11.9	0.5%	1.6%	205%	-7%	29
7 020714 Frozen cuts and edible offal of fowls of the specie	0.8	11.2	0.1%	1.5%	1277%	65%	167
8 300490 Medicaments consisting of mixed or unmixed prod	35.9	9.8	4.9%	1.3%	-73%	6%	1
9 730890 Structures and parts of structures, of iron or steel	9.9	8.8	1.3%	1.2%	-11%	-3%	12
10 854449 Electric conductors, for a voltage <= 1.000 V, insu	7.7	8.2	1.1%	1.1%	6%	8%	15
11 110710 Malt (excl. roasted)	6.5	7.9	0.9%	1.0%	21%	11%	17
12 300241 Vaccines for human medicine	0.0	6.9	0.0%	0.9%	..	..	3983
13 630900 Wom clothing and clothing accessories, blankets	10.4	6.8	1.4%	0.9%	-35%	8%	11
14 732690 Articles of iron or steel, n.e.s. (excl. cast articles	2.4	6.7	0.3%	0.9%	172%	14%	48
15 270810 Pitch obtained from coal tar or from other mineral	0.5	5.7	0.1%	0.7%	987%	29%	230
16 490199 Printed books, brochures and similar printed matt	10.8	5.6	1.5%	0.7%	-48%	-18%	10
17 854519 Electrodes of graphite or other carbon, for electric	8.7	5.6	1.2%	0.7%	-36%	-13%	14
18 481910 Cartons, boxes and cases, of corrugated paper or	4.5	5.1	0.6%	0.7%	13%	-7%	25
19 842230 Machinery for filling, closing, sealing or labelling t	5.7	5.0	0.8%	0.6%	-12%	37%	19
20 310230 Ammonium nitrate, whether or not in aqueous sol	1.1	4.9	0.1%	0.6%	349%	..	124
<i>Others & not specified</i>	549.7	435.5	74.8%	56.7%	-21%	..	..
Total	734.5	768.2	100%	100%	5%	7%	

Source: Own calculations based on Eurostat COMEXT data.

EU imports from Mozambique are led by aluminium (HS 760110), which increased from an annual average of €0.8 billion in the period 2013 to 2018 (59% of total imports from Mozambique) to €1.0 billion (55% of total imports) yearly since 2019 (Table 21). Coal and tobacco were the second- and third-most important imports in both periods. The largest increases among the top products, comparing the pre-EPA and EPA periods, were for graphite (a seven-fold increase), aluminium wire (+243%), and sesamum seeds (+196%). Conversely, imports of raw cane sugar decreased by 73%, from €64.1 million per year to

€17.6 million. Overall, however, the composition of the EU's top imports from Mozambique changed in a limited way since the pre-EPA period: 15 of the top 20 imports in the period 2019 to 2022 were already among the top 20 in the years 2013 to 2018, and changes within the top 20 were also more limited.

Table 21: Top 20 EU imports from Mozambique since the start of application of the EPA, average values per year (€ million), shares in total, and changes over time

	Av 2013-18	Av 2019-22	Share 2013-18	Share 2019-22	Change pre-post	CAGR 2018-22	Rank pre-EPA
1 760110 Aluminium, not alloyed, unwrought	818.8	1,006.6	58.6%	54.5%	23%	17%	1
2 270112 Bituminous coal, whether or not pulverised, non-a	154.3	210.2	11.1%	11.4%	36%	-1%	2
3 240120 Tobacco, partly or wholly stemmed or stripped, ot	104.8	97.5	7.5%	5.3%	-7%	-3%	3
4 760511 Wire of non-alloy aluminium, with a maximum cro	24.0	82.5	1.7%	4.5%	243%	18%	10
5 261400 Titanium ores and concentrates	24.2	48.5	1.7%	2.6%	101%	34%	9
6 271111 Natural gas, liquefied	0.0	40.8	0.0%	2.2%	..	..	1154
7 261510 Zirconium ores and concentrates	22.5	32.4	1.6%	1.8%	44%	9%	11
8 270119 Coal, whether or not pulverised, non-agglomerate	44.0	31.6	3.2%	1.7%	-28%	-8%	5
9 710391 Rubies, sapphires and emeralds, worked, whether	25.0	31.2	1.8%	1.7%	25%	-5%	8
10 030617 Frozen shrimps and prawns, even smoked, whethe	28.0	25.5	2.0%	1.4%	-9%	-5%	6
11 251611 Granite, crude or roughly trimmed (excl. already w	25.7	23.7	1.8%	1.3%	-8%	1%	7
12 170114 Raw cane sugar, in solid form, not containing add	64.1	17.6	4.6%	1.0%	-73%	2%	4
13 250410 Natural graphite in powder or in flakes	1.5	11.0	0.1%	0.6%	616%	21%	24
14 72SSS9 Confidential trade of chapter 72 and SITC section	0.0	8.5	0.0%	0.5%	..	..	1154
15 080132 Fresh or dried cashew nuts, shelled	5.9	7.7	0.4%	0.4%	30%	-16%	12
16 120740 Sesamum seeds, whether or not broken	1.9	5.6	0.1%	0.3%	196%	25%	19
17 240110 Tobacco, unstemmed or unstripped	2.5	5.4	0.2%	0.3%	116%	-4%	14
18 170199 Cane or beet sugar and chemically pure sucrose, i	0.0	5.0	0.0%	0.3%	..	1021%	258
19 240130 Tobacco refuse	4.7	4.7	0.3%	0.3%	0%	-3%	13
20 440398 Eucalyptus "Eucalyptus spp." in the rough, whethe	0.0	4.7	0.0%	0.3%	..	..	587
Others & not specified	44.3	145.0	3.2%	7.9%	228%	..	
Total	1,396.2	1,845.6	100%	100%	32%	13%	

Source: Own calculations based on Eurostat COMEXT data.

In sum, **based on the performance of the EU's top exports, no effect of the tariff cuts offered by Mozambique under the EPA can be deduced as there is no correlation between tariff preferences and export values. In contrast, the relative stability of the composition of top EU imports from Mozambique is in line with the fact that the EPA did not change preferential tariffs for Mozambique compared to the EBA.**

The relationship between tariff preferences and trade performance remains to be further analysed.

4.5. EU-Namibia trade

As already discussed in section 2.6, the **EU's top export to Namibia** both before and since the EPA's start of application were copper ores, followed by fuels (Table 22); for neither of these products the EPA provides a tariff preference as they are either MFN duty-free or excluded from the liberalisation.¹⁰ Exports of vessels (light-vessels/floating docks and shipping vessels) ranked 3rd and 4th in the period 2017 to 2022 with substantially larger average export values than in the years prior to the EPA, but show large fluctuations over the years, given the high unit prices. In particular, all exports of light-vessels occurred in only one year. It is thus difficult to establish trends over time. Again, the EPA provides no tariff preference for them, given their MFN duty-free status.

Among agricultural products, malt and wheat are the two most important exports, ranking 5th and 10th in the period 2017 to 2022. Their exports trends are largely flat, with strong fluctuations over time. Under the EPA, wheat is subjected to a TRQ and can be imported only during certain months of the year; on the other hand, the applied MFN tariff in 2023

¹⁰ For some specific fuels, the EPA does provide a tariff preference: HS 27101226 and HS 27101239.

is zero. EU malt can enter Namibia duty-free, but again the MFN rate for malt made from wheat and barley is also zero (malt made from other grains attracts duties of 3% or 20%).

A clear upward trend can be observed for different types of construction machinery, notably dumpers and self-propelled shovel loaders: the average export value of the former increased from zero prior to the EPA to an annual average of €8.8 million in the years 2017 to 2022 (reaching €22.1 million in 2022); for shovel loaders, the increase was from €0.4 million to €8.3 million (€19.7 million in 2022). The EPA provides a tariff preference of 5% for dumpers with a weight of up to 50t and 10% for certain front-end shovel loaders.

Compared to most other SADC EPA States, EU exports of pharmaceuticals are limited, with vaccines and medicaments ranked 14th and 20th, respectively. Generally, the composition of the EU's top exports to Namibia changed quite substantially over time; only 11 of the top 20 exports in the years preceding the EPA also were among the top 20 since the EPA started to be applied (see last column in Table 22).

Table 22: Top 20 EU exports to Namibia since the start of application of the EPA, average values per year (€ million), shares in total, and changes over time

	Av 2011-16	Av 2017-22	Share 2011-16	Share 2017-22	Change pre-post	CAGR 2016-22	Rank pre-EPA
1 260300 Copper ores and concentrates	115.1	125.9	23.4%	28.7%	9%	13%	1
2 271012 Light oils and preparations, of petroleum or bitum	55.8	50.2	11.3%	11.4%	-10%	15%	2
3 890590 Light-vessels, fire-floats, floating cranes and othe	0.1	22.4	0.0%	5.1%	29948%	..	425
4 890200 Fishing vessels; factory ships and other vessels f	3.6	12.2	0.7%	2.8%	243%	-18%	15
5 110710 Malt (excl. roasted)	13.8	11.0	2.8%	2.5%	-20%	9%	4
6 870410 Dumpers for off-highway use	0.0	8.8	0.0%	2.0%	18446%	..	542
7 99BBB0 Articles declared as supplies or services for ships	7.3	8.8	1.5%	2.0%	20%	8%	8
8 840999 Parts suitable for use solely or principally with co	11.1	8.3	2.3%	1.9%	-25%	7%	5
9 842951 Self-propelled front-end shovel loaders	0.4	8.3	0.1%	1.9%	2153%	118%	140
10 100199 Wheat and meslin (excl. seed for sowing, and dur	5.9	7.8	1.2%	1.8%	33%	4%	10
11 030743 Cuttle fish and squid, frozen, with or without shel	0.0	4.1	0.0%	0.9%	..	..	2922
12 730210 Rails of iron or steel, for railway or tramway track	3.0	3.1	0.6%	0.7%	4%	..	18
13 710231 Non-industrial diamonds unworked or simply sawn	3.3	3.1	0.7%	0.7%	-6%	32%	16
14 300220/41 Vaccines for human medicine	1.4	2.9	0.3%	0.7%	110%	-9%	35
15 020714 Frozen cuts and edible offal of fowls of the specie	0.1	2.7	0.0%	0.6%	2319%	31%	336
16 851762 Machines for the reception, conversion and transn	2.6	2.5	0.5%	0.6%	-5%	3%	21
17 271019 Medium oils and preparations, of petroleum or bit	8.8	2.2	1.8%	0.5%	-75%	-30%	7
18 850440 Static converters	1.3	2.0	0.3%	0.5%	57%	-13%	39
19 842199 Parts of machinery and apparatus for filtering or p	2.0	2.0	0.4%	0.5%	0%	-13%	25
20 300490 Medicaments consisting of mixed or unmixed prod	2.7	2.0	0.6%	0.4%	-28%	-12%	19
<i>Others & not specified</i>	253.4	148.3	51.5%	33.8%	-41%	..	..
Total	491.8	438.6	100%	100%	-11%	9%	

Source: Own calculations based on Eurostat COMEXT data.

EU imports from Namibia are led by copper, which increased from an annual average of €239 million in the period 2011 to 2016 (26% of total EU imports from Namibia) to €433 million (35% of total imports) yearly since 2017 (Table 23). Imports of copper cathodes also strongly increased, from €12 million to €47 million annually. A number of other extractives were also among the top 20 products: diamonds (both unworked and worked, both expanding strongly), uranium (although rapidly declining, from €100 million to €40 million), zinc and zinc ore, and marble. A range of fishery products account for the second group of important Namibian exports to the EU: Frozen fillets of hake are by far the most important of them: their value increased from €159 million per year in the pre-EPA period to €214 million since then, although the trend has been flat since 2016. Other important agricultural products are fresh grapes (ranked 5th) and boneless beef (ranked 15th) both with slightly increasing export values. The most dynamic product among the top 20 has however been wood charcoal, whose exports to the EU increased from €5 million per-EPA to €28 million since (+440%), and €56 million in 2022. At the same time, in line with the increase in total EU imports from Namibia, most of the top products also saw rising values, with the exception of uranium, unwrought zinc, and fresh/chilled and frozen hake.

Overall, the composition of the EU's top imports from Namibia changed little since the pre-EPA period: 16 of the top 20 imports in the period 2017 to 2022 were already among the top 20 in the years 2011 to 2016.

Table 23: Top 20 EU imports from Namibia since the start of application of the EPA, average values per year (€ million), shares in total, and changes over time

	Av 2011-16	Av 2017-22	Share 2011-16	Share 2017-22	Change pre-post	CAGR 2016-22	Rank pre-EPA
1 740200 Copper, unrefined; copper anodes for electrolytic	239.3	433.5	25.7%	34.8%	81%	18%	1
2 030429/74 Frozen fillets of hake "Merluccius spp., Urophycis	159.1	213.6	17.1%	17.2%	34%	2%	2
3 710231 Non-industrial diamonds unworked or simply sawn	49.5	109.8	5.3%	8.8%	122%	-3%	5
4 740311 Copper, refined, in the form of cathodes and sections	11.6	46.8	1.2%	3.8%	303%	-29%	11
5 080610 Fresh grapes	32.3	42.6	3.5%	3.4%	32%	1%	6
6 284410 Natural uranium and its compounds; alloys, dispersed	99.6	40.1	10.7%	3.2%	-60%	-7%	4
7 880240 Aeroplanes and other powered aircraft of an of an	0.0	37.8	0.0%	3.0%	..	..	1311
8 790111 Unwrought zinc, not alloyed, containing by weight	112.2	36.9	12.1%	3.0%	-67%	-100%	3
9 260800 Zinc ores and concentrates	22.6	33.5	2.4%	2.7%	48%	8%	8
10 030379/89 Frozen fish, n.e.s.	27.0	28.0	2.9%	2.3%	4%	-1%	7
11 440290 Wood charcoal, incl. shell or nut charcoal, whether	5.1	27.8	0.6%	2.2%	440%	34%	21
12 710239 Diamonds, worked, but not mounted or set (excl.	9.9	26.2	1.1%	2.1%	165%	74%	14
13 030495 Frozen meat, whether or not minced, of fish of the	11.1	26.1	1.2%	2.1%	135%	28%	12
14 03074x Cuttle fish and squid, frozen, with or without shells	7.7	12.2	0.8%	1.0%	59%	11%	16
15 020130 Fresh or chilled bovine meat, boneless	9.1	11.5	1.0%	0.9%	26%	3%	15
16 030614 Frozen crabs, even smoked, whether in shell or not	3.7	10.7	0.4%	0.9%	187%	16%	28
17 790112 Unwrought zinc, not alloyed, containing by weight	4.0	9.6	0.4%	0.8%	143%	-100%	27
18 251511 Marble and travertine, crude or roughly trimmed	6.3	9.3	0.7%	0.7%	48%	17%	19
19 030254 Fresh or chilled hake "Merluccius spp., Urophycis s	12.7	9.1	1.4%	0.7%	-28%	-3%	10
20 030366/78 Frozen hake "Merluccius spp., Urophycis spp."	10.9	8.8	1.2%	0.7%	-19%	-6%	13
<i>Others & not specified</i>	<i>97.1</i>	<i>70.6</i>	<i>10.4%</i>	<i>5.7%</i>	<i>-27%</i>	<i>..</i>	
Total	930.8	1,244.6	100%	100%	34%	4%	

Source: Own calculations based on Eurostat COMEXT data.

Overall, **based on the performance of the EU's top exports, tariff preferences provided by the EPA may supported the increase in shipments of construction machinery – this remains to be further studied. For most of the top EU exports, the EPA however provides no tariff preferences. The role of the EPA tariff preferences in the increase in imports of most top 20 import products from Namibia remains to be analysed further.**

4.6. EU-South Africa trade

Out of the **EU's top 20 exports to South Africa** since the EPA's start of application, ten were motor vehicles and parts (Table 24); many of these benefit from various levels of tariff preferences, depending on the specific product. However, the two highest-value EU exports to South Africa in the EPA period were medicaments (€554 million per year, 9% more than the annual average of €510 million in the five years prior to the EPA), and fuels (€452 million, 13% higher than the €399 million pre-EPA). For neither of these two products does the EPA provide a tariff preference: medicaments are MFN duty-free, and fuels are either duty free or excluded from the liberalisation.¹¹

Few of the top 20 exports are not related to the automotive sector, pharmaceuticals or mineral fuels. These are compounds of precious minerals (average export value of €401 million, 35% more than pre-EPA), phone equipment (€223 million, 40% more than pre-EPA), computer parts (€213 million, +28%), wheat and meslin (€198 million, +230%), jewellery (€182 million, +327%), and electric boards (€178 million, +35%). Among these, the EPA provides a tariff preference of 20% for jewellery and 5%-15% for electric boards; the other products are MFN duty-free.

Jewellery and wheat were also the fastest growing exports among the EU's top 20, followed by vaccines (+149%) and medium oils (+116%); other fast growing notable exports are listed in Table 25¹² and include a diverse set of products, including some automotive products, soda ash, lithium ion accumulators, spirits from grape wine, sunflower oil and

¹¹ As noted previously, for some specific fuels the EPA does provide a tariff preference: HS 27101226 and HS 27101239. South Africa's imports of these two products from the EU are however very limited, according to SARS statistics.

¹² The table only considers the top 100 products by export value, i.e. those whose exports in 2022 exceeded €50 million. For smaller exports, changes year-on-year are often large, easily distorting growth rates.

others. For at least some of these, the EPA provides tariff preferences, and interviews e.g. with representatives of the EU spirits industry have confirmed their importance for successfully exporting to South Africa.

As noted before, EU exports to South Africa are fairly diversified (although there has been some degree of concentration since the EPA started to be applied): the top 20 export products together accounted for 23% of total exports to South Africa in the years 2011 to 2016, and 27% since 2017.

Table 24: Top 20 EU exports to South Africa since the start of application of the EPA, average values per year (€ million), shares in total, and changes over time

		Av 2011-16	Av 2017-22	Share 2011-16	Share 2017-22	Change pre-post	CAGR 2016-22	Rank pre-EPA
1	300490 Medicaments consisting of mixed or unmixed prod	510.2	554.3	2.4%	2.5%	9%	2%	2
2	271011/12 Light oils and preparations, of petroleum or bi	398.7	451.8	1.8%	2.0%	13%	22%	3
3	870120/21 Road tractors for semi-trailers	322.0	448.6	1.5%	2.0%	39%	19%	8
4	870899 Parts and accessories, for tractors, motor vehicles	362.1	441.3	1.7%	2.0%	22%	6%	4
5	284390 Inorganic or organic compounds of precious metal	297.0	400.6	1.4%	1.8%	35%	13%	9
6	870840 Gear boxes and parts thereof, for tractors, motor	271.8	343.8	1.3%	1.6%	26%	5%	10
7	870323 Motor cars and other motor vehicles principally de	592.8	343.7	2.7%	1.6%	-42%	-7%	1
8	840734 Spark-ignition reciprocating piston engine, of a ki	347.6	312.8	1.6%	1.4%	-10%	3%	5
9	870829 Parts and accessories of bodies for tractors, moto	330.2	295.9	1.5%	1.3%	-10%	-5%	6
10	840820 Compression-ignition internal combustion piston e	141.4	263.1	0.7%	1.2%	86%	3%	18
11	870332 Motor cars and other motor vehicles principally de	327.6	245.4	1.5%	1.1%	-25%	-6%	7
12	271019 Medium oils and preparations, of petroleum or bit	109.4	236.4	0.5%	1.1%	116%	44%	26
13	851762 Machines for the reception, conversion and transn	159.9	223.4	0.7%	1.0%	40%	5%	15
14	847330 Parts and accessories of automatic data-processin	166.0	213.2	0.8%	1.0%	28%	8%	14
15	870321 Motor cars and other motor vehicles principally de	117.2	208.4	0.5%	0.9%	78%	0%	24
16	870322 Motor cars and other motor vehicles principally de	248.9	207.8	1.2%	0.9%	-16%	3%	12
17	10019x Wheat and meslin (excl. durum wheat)	60.1	198.3	0.3%	0.9%	230%	21%	60
18	711319 Articles of jewellery and parts thereof, of precious	42.5	181.7	0.2%	0.8%	327%	27%	93
19	300220/41 Vaccines for human medicine	72.6	180.4	0.3%	0.8%	149%	18%	47
20	853710 Boards, cabinets and similar combinations of app	132.3	178.0	0.6%	0.8%	35%	1%	19
	<i>Others & not specified</i>	16,610.4	16,176.9	76.8%	73.2%	-3%	..	..
	Total	21,620.8	22,105.6	100%	100%	2%	4%	

Source: Own calculations based on Eurostat COMEXT data.

Table 25: 20 fastest-growing EU exports to South Africa based on average values since the start of application of the EPA vs. years prior to the EPA – values per year (€ million), shares in total, and changes over time (only products with export value of at least €50 million in 2022)

		Av 2011-16	Av 2017-22	2022	Share 2017-22	Change pre-post	CAGR 2016-22	Rank EPA
1	840733 Spark-ignition reciprocating piston engine, of a ki	0.1	114.4	112.1	0.5%	96176%	223%	25
2	270799 Oils and other products of the distillation of high	1.0	65.6	59.5	0.3%	6165%	102%	54
3	283620 Disodium carbonate	0.8	12.0	57.0	0.1%	1457%	127%	362
4	850760 Lithium-ion accumulators (excl. spent)	3.7	54.8	151.0	0.2%	1374%	53%	62
5	711319 Articles of jewellery and parts thereof, of precious	42.5	181.7	327.4	0.8%	327%	27%	18
6	381512 Supported catalysts with precious metal or a prec	5.2	21.7	77.5	0.1%	318%	50%	194
7	10019x Wheat and meslin (excl. durum wheat)	60.1	198.3	217.7	0.9%	230%	21%	17
8	310420 Potassium chloride for use as fertiliser (excl. that	3.5	11.6	69.1	0.1%	229%	104%	377
9	843351 Combine harvester-threshers	7.9	25.0	67.4	0.1%	218%	56%	168
10	722592 Flat-rolled products of alloy steel other than stair	22.4	67.5	102.5	0.3%	201%	22%	53
11	220820 Spirits obtained by distilling grape wine or grape	17.2	50.4	76.9	0.2%	193%	19%	75
12	852990 Parts suitable for use solely or principally with tra	21.7	59.0	106.7	0.3%	172%	29%	59
13	30021x Antisera and other blood fractions and immunolog	29.2	76.2	99.7	0.3%	161%	13%	45
14	300220/41 Vaccines for human medicine	72.6	180.4	223.9	0.8%	149%	18%	19
15	850710 Lead-acid accumulators of a kind used for starting	23.6	51.7	65.6	0.2%	119%	19%	70
16	271019 Medium oils and preparations, of petroleum or bit	109.4	236.4	503.9	1.1%	116%	44%	12
17	151211 Crude sunflower-seed or safflower oil	50.8	103.2	194.4	0.5%	103%	15%	27
18	340399 Lubricant preparations, incl. cutting-oil preparatio	10.0	20.1	58.7	0.1%	101%	37%	216
19	840820 Compression-ignition internal combustion piston e	141.4	263.1	285.8	1.2%	86%	3%	10
20	330210 Mixtures of odoriferous substances and mixtures,	38.6	69.8	80.1	0.3%	81%	10%	49
	<i>Others & not specified</i>	20,958.9	20,242.7	23,465.2	91.6%	-3%	..	..
	Total	21,620.8	22,105.6	26,402.0	100%	2%	4%	

Source: Own calculations based on Eurostat COMEXT data.

EU imports from South Africa are somewhat more concentrated, and increasing: the top 20 products together accounted for about 60% of the total in the period 2017 to 2022, up from about 50% in the pre-EPA period (Table 26). The top 20 exports mainly fall into three product groups: mining products (ten products, including precious metal ores, iron ores, bituminous coal, rhodium, platinum, palladium, diamonds, gold), vehicles and vehicle parts (seven products), and fruit (grapes and oranges). Exports of all of these except for

unwrought platinum, ferro-chromium, and gold were higher since the EPA started to be applied than in the six years before. The EPA provides tariff preferences for automotive products (varying degrees), ferro chromium (4%), and partial preferences for fruit, whereas mining products enter the EU duty-free under MFN.

Products with the highest growth, comparing the EPA period 2017 to 2022 with the pre-EPA period 2011 to 2016 are listed in Table 27.¹³ Among the fastest growing imports were, in addition to those already mentioned, some agricultural products such as cane sugar, cranberries and blueberries, lemons and mandarins, and animal or vegetable fats. Different types of flat rolled steel were also among the top 20. For cane sugar, the EPA created a new partial market access preference for South Africa, compared to the TDCA, by introducing a TRQ for raw sugar for refining. The EPA also provides preference, compared to MFN treatment, for all of the agricultural products mentioned.

Table 26: Top 20 EU imports from South Africa since the start of application of the EPA, average values per year (€ million), shares in total, and changes over time

	Av 2011-16	Av 2017-22	Share 2011-16	Share 2017-22	Change pre-post	CAGR 2016-22	Rank pre-EPA
1 261690 Precious-metal ores and concentrates (excl. silver	344.6	1,098.5	2.5%	5.5%	219%	30%	11
2 870421 Motor vehicles for the transport of goods, with co	362.5	1,029.4	2.7%	5.2%	184%	15%	9
3 842132/39 Catalytic converters or particulate filters, whet	921.1	1,000.1	6.8%	5.0%	9%	11%	1
4 870332 Motor cars and other motor vehicles principally de	546.0	898.0	4.0%	4.5%	64%	-30%	6
5 260111 Non-agglomerated iron ores and concentrates (ex	351.2	834.7	2.6%	4.2%	138%	28%	10
6 711890 Coin of legal tender	487.7	791.1	3.6%	4.0%	62%	17%	7
7 270112 Bituminous coal, whether or not pulverised, non-e	712.0	759.1	5.2%	3.8%	7%	41%	2
8 870321 Motor cars and other motor vehicles principally de	77.5	727.2	0.6%	3.6%	839%	28%	30
9 711031 Rhodium, unwrought or in powder form	50.0	671.8	0.4%	3.4%	1244%	82%	51
10 711292 Waste and scrap of platinum, incl. metal clad witi	33.1	510.0	0.2%	2.6%	1440%	65%	68
11 711011 Platinum, unwrought or in powder form	605.1	480.5	4.5%	2.4%	-21%	-2%	3
12 870323 Motor cars and other motor vehicles principally de	177.6	458.3	1.3%	2.3%	158%	-12%	15
13 711021 Palladium, unwrought or in powder form	100.9	395.3	0.7%	2.0%	292%	33%	28
14 710231 Non-industrial diamonds unworked or simply sawr	323.7	350.9	2.4%	1.8%	8%	-5%	12
15 870350 Motor cars and other motor vehicles principally de	0.0	341.7	0.0%	1.7%	..	..	4243
16 080610 Fresh grapes	266.8	336.9	2.0%	1.7%	26%	5%	13
17 720241 Ferro-chromium, containing by weight > 4% of ca	557.2	331.0	4.1%	1.7%	-41%	-3%	5
18 870333 Motor cars and other motor vehicles principally de	109.9	309.3	0.8%	1.5%	181%	-54%	25
19 080510 Fresh or dried oranges	218.3	309.1	1.6%	1.5%	42%	5%	14
20 710812 Gold, incl. gold plated with platinum, unwrought, <i>Others & not specified</i>	585.3 6,743.8	270.1 8,077.5	4.3% 49.7%	1.4% 40.4%	-54% 20%	3% ..	4 ..
Total	13,574.3	19,980.5	100%	100%	47%	13%	

Source: Own calculations based on Eurostat COMEXT data.

Table 27: 20 fastest-growing EU imports from South Africa based on average values since the start of application of the EPA vs. years prior to the EPA – values per year (€ million),

¹³ As above for EU exports, the table only considers the top 100 products by import value in the EU, i.e. those whose imports in 2022 exceeded €30 million. For smaller imports, changes year-on-year are often large, easily distorting growth rates.

shares in total, and changes over time (only products with import value of at least €30 million in 2022)

	Av 2011-16	Av 2017-22	2022	Share 2017-22	Change pre-post	CAGR 2016-22	Rank EPA
1 300220/41 Vaccines for human medicine	0.0	65.6	213.0	0.3%	804975%	345%	51
2 170114 Raw cane sugar, in solid form, not containing add	0.7	39.9	83.4	0.2%	5328%	757%	75
3 260112 Agglomerated iron ores and concentrates (excl. ro	1.1	47.2	79.7	0.2%	4027%	..	65
4 711292 Waste and scrap of platinum, incl. metal clad witi	33.1	510.0	857.9	2.6%	1440%	65%	10
5 711031 Rhodium, unwrought or in powder form	50.0	671.8	1,442.0	3.4%	1244%	82%	9
6 081040 Fresh cranberries, bilberries and other fruits of th	3.5	44.5	76.4	0.2%	1165%	36%	66
7 26SSS2 Confidential trade of chapter 26 and SITC section	16.6	162.3	261.3	0.8%	877%	..	25
8 870321 Motor cars and other motor vehicles principally de	77.5	727.2	783.7	3.6%	839%	28%	8
9 381512 Supported catalysts with precious metal or a prec	21.2	194.7	111.7	1.0%	817%	76%	24
10 721049 Flat-rolled products of iron or non-alloy steel, of a	5.6	41.9	139.5	0.2%	646%	610%	69
11 750210 Nickel, not alloyed, unwrought	22.6	123.7	279.6	0.6%	448%	48%	30
12 711021 Palladium, unwrought or in powder form	100.9	395.3	747.4	2.0%	292%	33%	13
13 080550 Fresh or dried lemons "Citrus limon, Citrus limonu	34.5	123.8	194.2	0.6%	258%	18%	29
14 721931 Flat-rolled products of stainless steel, of a width	4.8	16.2	31.0	0.1%	238%	24%	123
15 760110 Aluminium, not alloyed, unwrought	76.3	247.8	468.5	1.2%	225%	36%	21
16 261690 Precious-metal ores and concentrates (excl. silver	344.6	1,098.5	1,817.3	5.5%	219%	30%	1
17 151800 Animal or vegetable fats and oils and their fractio	3.7	11.7	31.2	0.1%	212%	34%	147
18 710813 Gold, incl. gold plated with platinum, in semi-mar	36.1	112.6	145.1	0.6%	212%	27%	33
19 870421 Motor vehicles for the transport of goods, with coi	362.5	1,029.4	1,193.1	5.2%	184%	15%	2
20 08052x Fresh or dried mandarins incl. tangerines and sats	36.4	101.4	140.5	0.5%	178%	14%	34
<i>Others & not specified</i>	<i>12,342.4</i>	<i>14,215.0</i>	<i>20,088.8</i>	<i>71.1%</i>	<i>15%</i>	<i>..</i>	
Total	13,574.3	19,980.5	29,185.3	100%	47%	13%	

Source: Own calculations based on Eurostat COMEXT data.

Considering the composition of the EU's largest and fastest growing exports to and imports from South Africa, the tariff preferences provided by the EU must be considered as important, notably for automotive and agricultural trade as well as at least certain other types of manufactured products, such as jewellery, electrical goods and processed food products including spirits. The relationship between tariff preferences and trade performance remains to be further analysed.

ANNEX: SUPPLEMENTARY TABLES

Table 28: Correspondence table HS chapter – broad sectors

Code	Description	Sector
01	Animals; live	Agriculture
02	Meat and edible meat offal	Agriculture
03	Fish and crustaceans, molluscs and other aquatic invertebrates	Agriculture
04	Dairy produce; birds' eggs; natural honey; edible products of animal origin, not elsewhere specified or included	Agriculture
05	Animal originated products; not elsewhere specified or included	Agriculture
06	Trees and other plants, live; bulbs, roots and the like; cut flowers and ornamental foliage	Agriculture
07	Vegetables and certain roots and tubers; edible	Agriculture
08	Fruit and nuts, edible; peel of citrus fruit or melons	Agriculture
09	Coffee, tea, mate and spices	Agriculture
10	Cereals	Agriculture
11	Products of the milling industry; malt, starches, inulin, wheat gluten	Agriculture
12	Oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruit, industrial or medicinal plants; straw and fodder	Agriculture
13	Lac; gums, resins and other vegetable saps and extracts	Agriculture
14	Vegetable plaiting materials; vegetable products not elsewhere specified or included	Agriculture
15	Animal, vegetable or microbial fats and oils and their cleavage products; prepared edible fats; animal or vegetable waxes	Agriculture
16	Meat, fish, crustaceans, molluscs or other aquatic invertebrates, or insects; preparations thereof	Agriculture
17	Sugars and sugar confectionery	Agriculture
18	Cocoa and cocoa preparations	Agriculture
19	Preparations of cereals, flour, starch or milk; pastrycooks' products	Agriculture
20	Preparations of vegetables, fruit, nuts or other parts of plants	Agriculture
21	Miscellaneous edible preparations	Agriculture
22	Beverages, spirits and vinegar	Agriculture
23	Food industries, residues and wastes thereof; prepared animal fodder	Agriculture
24	Tobacco and manufactured tobacco substitutes; products, whether or not containing nicotine, intended for inhalation without combustion; oth	Agriculture
25	Salt; sulphur; earths, stone; plastering materials, lime and cement	Minerals
26	Ores, slag and ash	Minerals
27	Mineral fuels, mineral oils and products of their distillation; bituminous substances; mineral waxes	Minerals
28	Inorganic chemicals; organic and inorganic compounds of precious metals; of rare earth metals, of radio-active elements and of isotopes	Chemicals
29	Organic chemicals	Chemicals
30	Pharmaceutical products	Chemicals
31	Fertilizers	Chemicals
32	Tanning or dyeing extracts; tannins and their derivatives; dyes, pigments and other colouring matter; paints, varnishes; putty, other mastics;	Chemicals
33	Essential oils and resinoids; perfumery, cosmetic or toilet preparations	Chemicals
34	Soap, organic surface-active agents; washing, lubricating, polishing or scouring preparations; artificial or prepared waxes, candles and similar	Chemicals
35	Albuminoidal substances; modified starches; glues; enzymes	Chemicals
36	Explosives; pyrotechnic products; matches; pyrophoric alloys; certain combustible preparations	Chemicals
37	Photographic or cinematographic goods	Chemicals
38	Chemical products n.e.c.	Chemicals
39	Plastics and articles thereof	Chemicals
40	Rubber and articles thereof	Chemicals
41	Raw hides and skins (other than furskins) and leather	Agriculture
42	Articles of leather; saddlery and harness; travel goods, handbags and similar containers; articles of animal gut (other than silk-worm gut)	Agriculture
43	Furskins and artificial fur; manufactures thereof	Agriculture
44	Wood and articles of wood; wood charcoal	Agriculture
45	Cork and articles of cork	Agriculture
46	Manufactures of straw, esparto or other plaiting materials; basketware and wickerwork	Agriculture
47	Pulp of wood or other fibrous cellulosic material; recovered (waste and scrap) paper or paperboard	Agriculture
48	Paper and paperboard; articles of paper pulp, of paper or paperboard	Other
49	Printed books, newspapers, pictures and other products of the printing industry; manuscripts, typescripts and plans	Other
50	Silk	Textiles
51	Wool, fine or coarse animal hair; horsehair yarn and woven fabric	Textiles
52	Cotton	Textiles
53	Vegetable textile fibres; paper yarn and woven fabrics of paper yarn	Textiles
54	Man-made filaments; strip and the like of man-made textile materials	Textiles
55	Man-made staple fibres	Textiles
56	Wadding, felt and nonwovens, special yarns; twine, cordage, ropes and cables and articles thereof	Textiles
57	Carpets and other textile floor coverings	Textiles
58	Fabrics; special woven fabrics, tufted textile fabrics, lace, tapestries, trimmings, embroidery	Textiles
59	Textile fabrics; impregnated, coated, covered or laminated; textile articles of a kind suitable for industrial use	Textiles
60	Fabrics; knitted or crocheted	Textiles
61	Apparel and clothing accessories; knitted or crocheted	Textiles
62	Apparel and clothing accessories; not knitted or crocheted	Textiles
63	Textiles, made up articles; sets; worn clothing and worn textile articles; rags	Textiles
64	Footwear; gaiters and the like; parts of such articles	Textiles
65	Headgear and parts thereof	Textiles
66	Umbrellas, sun umbrellas, walking-sticks, seat sticks, whips, riding crops; and parts thereof	Textiles
67	Feathers and down, prepared; and articles made of feather or of down; artificial flowers; articles of human hair	Textiles
68	Stone, plaster, cement, asbestos, mica or similar materials; articles thereof	Stone
69	Ceramic products	Stone
70	Glass and glassware	Stone
71	Natural, cultured pearls; precious, semi-precious stones; precious metals, metals clad with precious metal, and articles thereof; imitation jew	Stone
72	Iron and steel	Metals
73	Iron or steel articles	Metals
74	Copper and articles thereof	Metals
75	Nickel and articles thereof	Metals
76	Aluminium and articles thereof	Metals
78	Lead and articles thereof	Metals
79	Zinc and articles thereof	Metals
80	Tin; articles thereof	Metals
81	Metals; n.e.c., cermets and articles thereof	Metals
82	Tools, implements, cutlery, spoons and forks, of base metal; parts thereof, of base metal	Metals
83	Metal; miscellaneous products of base metal	Metals
84	Machinery and mechanical appliances, boilers, nuclear reactors; parts thereof	Machinery
85	Electrical machinery and equipment and parts thereof; sound recorders and reproducers; television image and sound recorders and reproducen	Electronics
86	Railway, tramway locomotives, rolling-stock and parts thereof; railway or tramway track fixtures and fittings and parts thereof; mechanical (ir	Vehicles
87	Vehicles; other than railway or tramway rolling stock, and parts and accessories thereof	Vehicles
88	Aircraft, spacecraft, and parts thereof	Vehicles
89	Ships, boats and floating structures	Vehicles
90	Optical, photographic, cinematographic, measuring, checking, medical or surgical instruments and apparatus; parts and accessories	Machinery
91	Clocks and watches and parts thereof	Machinery
92	Musical instruments; parts and accessories of such articles	Machinery
93	Arms and ammunition; parts and accessories thereof	Other
94	Furniture; bedding, mattresses, mattress supports, cushions and similar stuffed furnishings; lamps and lighting fittings, n.e.c.; illuminated si	Textiles
95	Toys, games and sports requisites; parts and accessories thereof	Machinery
96	Miscellaneous manufactured articles	Machinery
97	Works of art; collectors' pieces and antiques	Other
99	Commodities not specified according to kind	Other

Table 29: Exports of EPA Parties to selected destination countries, 2012-2022 (USD millions)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Botswana											
World			8,320	6,093	7,321	5,929	6,716	5,310	4,375	7,474	8,413
Australia			0	6	0	0	1	0	1	1	0
Brazil			0	0	0	0	0	0	0	0	0
China			61	38	45	16	0	0	2	96	259
India			1,157	784	1,107	1,164	1,342	1,141	913	1,291	1,280
Russia			0	3	0	0	0	3	9	0	0
Turkey			0	0	0	0	0	0	0	0	0
UK			79	63	92	41	56	19	3	4	9
USA			182	121	166	126	219	80	60	116	171
EU27			2,138	1,379	1,540	1,411	1,504	1,093	939	1,766	1,609
Eswatini											
World	1,845	2,034	2,011	1,820	1,716	1,801	1,842	2,002	1,752	2,061	
Australia	3	4	1	1	4	3	1	0	0	0	0
Brazil	0	0	0	0	0	0	0	0	0	0	0
China	12	54	34	0	0	1	24	0	0	0	0
India	0	0	0	0	0	0	0	0	0	1	
Russia	0	0	1	1	1	0	1	2	1	2	
Turkey				0	0	0	0	0	0	0	0
UK	15	10	32	12	46	10	21	11	46	40	
USA	62	54	57	18	17	15	12	22	26	18	
EU27	322	390	270	207	153	77	82	122	99	106	
Lesotho											
World				593	642	706	870	879	831	931	
Australia				1	1	1	1	1	1	0	
Brazil				0	0	0	0	0	0	0	
China				0	1	0	2	25	1	0	
India				0	0	0	0	0	0	0	
Russia											
Turkey					0	0	0	0	0	0	
UK				0	1	1	0	1	1	1	
USA				176	275	295	295	310	226	287	
EU27				186	4	7	144	175	276	185	
Mozambique											
World						4,719	5,196	4,722	3,460	5,112	8,265
Australia						10	1	1	11	1	0
Brazil						1	19	60	33	1	3
China						253	302	324	255	489	429
India						1,622	1,436	804	423	803	1,745
Russia						6	5	5	4	13	2
Turkey						29	41	22	6	11	29
UK						211	93	220	373	372	986
USA						53	99	83	60	102	124
EU27						1,282	1,651	1,457	1,247	1,501	2,154
Namibia											
World	5,054	5,712	5,984	3,861	2,995	3,468	4,097	3,677	2,990	3,694	4,244
Australia	8	8	7	8	6	6	23	4	5	0	5
Brazil	1	0	43	0	1	1	0	0	8	1	0
China	147	143	179	134	143	186	499	615	632	14	653
India	11	13	11	0	1	3	0	2	1	0	36
Russia	2	3	1	1	1	1	1	2	1	0	3
Turkey	5	3	3	1	1	0	1	3	0	0	2
UK	624	125	57	70	47	43	47	47	36	11	36
USA	199	215	218	45	58	47	5	36	17	4	76
EU27	1,844	1,061	748	684	752	813	986	762	535	13	798
South Africa											
World	98,427	94,568	92,056	79,874	75,506	87,915	91,290	87,142	85,045	120,922	121,149
Australia	889	809	838	847	744	900	844	717	757	835	833
Brazil	788	658	632	616	380	405	460	420	293	473	499
China	10,318	12,045	8,769	7,419	6,916	8,672	8,527	9,579	9,791	13,570	11,685
India	3,750	3,001	3,755	3,200	3,268	4,108	4,487	4,018	3,224	4,150	5,217
Russia	427	402	366	292	283	355	402	378	381	411	283
Turkey	650	638	596	537	399	456	506	287	435	470	552
UK	3,343	3,295	3,446	3,278	3,168	3,468	4,755	4,650	4,238	8,174	6,301
USA	7,815	6,889	6,450	6,099	5,443	6,612	6,239	6,161	7,109	12,804	10,590
EU27	16,920	16,507	17,618	16,481	16,765	19,118	21,588	21,483	20,284	30,889	31,730
EU27											
Australia	42,051	40,749	37,659	33,353	34,432	37,486	40,455	38,035	36,253	42,997	43,991
Brazil	48,746	49,624	46,461	36,266	32,502	33,632	37,347	36,154	30,994	39,129	44,374
China	182,266	193,002	214,425	184,157	183,398	217,071	244,069	246,863	239,163	274,238	266,882
India	48,846	47,101	46,307	41,161	40,624	45,671	52,181	46,974	37,880	51,806	59,067
Russia	154,384	154,692	133,909	79,166	78,255	94,672	97,285	97,624	89,220	104,295	56,693
Turkey	94,119	100,325	96,016	84,493	83,601	92,227	91,991	79,467	83,369	98,632	109,329
UK	322,034	339,368	357,198	319,716	318,464	327,470	344,740	325,426	287,167	321,767	329,095
USA	364,291	371,800	397,438	394,352	388,120	409,820	459,097	482,151	432,612	508,041	579,023
Extra-EU	2,140,585	2,272,122	2,226,442	1,951,950	1,902,823	2,088,183	2,286,373	2,255,632	2,065,894	2,503,610	2,657,845
SADC EPA	34,725	34,445	32,096	28,856	25,997	28,037	29,284	28,839	22,449	29,383	31,014

Source: Own calculations based on UN COMTRADE

Table 30: Imports of EPA Parties from selected supplying countries, 2012-2022 (USD millions)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Botswana											
World			9,149	8,043	6,103	5,331	6,461	6,657	6,605	8,462	8,115
Australia			9	15	7	4	8	6	15	14	45
Brazil			2	5	4	1	2	3	2	20	102
China			91	107	90	72	117	126	162	198	202
India			77	64	159	189	213	245	173	387	362
Russia			6	29	24	21	44	142	112	174	50
Turkey			2	2	1	6	4	4	3	6	9
UK			64	60	81	47	61	71	27	36	52
USA			113	79	53	80	77	123	46	62	121
EU27			519	415	414	235	402	623	741	1,470	696
Eswatini											
World	1,967	1,917	1,730	1,508	1,534	1,612	1,858	1,832	1,605	2,116	
Australia	1	1	0	0	1	1	0	0	0	10	
Brazil	5	2	1	1	2	2	2	2	2	3	
China	79	70	68	62	66	105	115	131	118	206	
India	17	19	26	61	38	36	69	38	54	57	
Russia	0	0		1	8	5	6	1	1	0	
Turkey	0	2	1	1	0	12	14	11	1	2	
UK	8	6	12	9	5	5	8	13	7	11	
USA	12	16	28	29	20	21	23	29	31	32	
EU27	49	38	40	65	80	62	76	87	75	94	
Lesotho											
World				1,421	1,356	1,664	1,625	1,589	1,281	1,668	
Australia				0	0		0	0	0	0	
Brazil				0	1		0	0	0	0	
China				74	70	0	98	127	85	144	
India				31	44		34	53	48	24	
Russia							0	2	0	0	
Turkey				0	0		3	2	1	1	
UK				1	3	0	3	2	2	2	
USA				6	8		7	3	4	8	
EU27				16	22	0	23	32	22	30	
Mozambique											
World						5,702	6,786	7,639	6,438	8,623	14,665
Australia						14	7	36	9	94	231
Brazil						33	35	37	28	32	59
China						493	799	862	695	946	1,060
India						451	490	464	620	740	842
Russia						38	80	73	60	53	70
Turkey						22	49	46	51	77	58
UK						37	53	96	177	147	52
USA						112	218	209	154	241	219
EU27						1,283	1,235	1,010	863	1,072	902
Namibia											
World	7,114	7,553	8,531	7,656	6,709	6,767	8,239	7,756	6,814	10,666	7,905
Australia	13	18	21	18	13	14	14	12	15	22	29
Brazil	12	8	13	10	4	39	16	14	16	39	63
China	287	230	336	465	197	349	439	316	307	582	599
India	38	51	151	145	155	147	142	227	174	316	369
Russia	3	4	6	42	35	10	27	26	39	40	19
Turkey	3	1	10	48	89	73	36	54	63	36	27
UK	173	119	91	32	29	53	199	72	58	166	103
USA	45	141	209	75	126	133	166	171	166	228	264
EU27	597	655	819	524	446	909	829	860	687	1,349	1,181
South Africa											
World	103,776	103,010	99,508	85,297	74,783	82,754	92,310	87,647	68,943	92,857	111,300
Australia	1,411	1,335	1,092	962	747	993	1,310	1,032	758	1,104	1,275
Brazil	1,667	1,607	1,367	1,397	1,410	1,558	1,481	1,186	1,066	1,300	1,594
China	14,618	15,989	15,442	15,673	13,606	15,234	17,089	16,265	14,309	19,227	22,462
India	4,594	5,372	4,543	4,221	3,120	3,917	3,843	4,323	3,582	5,348	8,334
Russia	202	378	456	485	259	393	512	530	530	623	548
Turkey	503	661	649	581	434	545	606	647	557	941	1,851
UK	3,515	3,342	3,272	2,751	2,177	2,498	2,892	2,938	1,694	1,871	1,814
USA	7,490	6,568	6,602	6,026	5,017	5,504	5,547	5,783	4,436	6,576	8,204
EU27	29,190	29,390	27,835	25,371	23,332	25,594	26,414	26,119	19,732	24,772	26,238
EU27											
Australia	18,290	13,110	11,951	10,401	14,387	14,751	13,550	20,325	17,714	14,199	21,034
Brazil	50,369	45,041	42,474	34,972	33,424	35,217	38,257	34,007	31,523	42,500	56,985
China	406,847	408,961	447,052	419,298	417,119	450,718	501,441	507,548	531,649	670,518	779,380
India	50,301	51,244	52,777	46,411	46,005	51,860	57,222	56,503	47,234	68,618	86,987
Russia	251,853	247,279	220,867	138,516	119,831	147,815	181,400	163,734	123,722	208,874	212,930
Turkey	64,107	68,757	74,345	70,021	75,779	81,028	92,659	92,341	84,573	114,499	124,809
UK	221,528	223,210	220,897	190,103	176,454	196,186	206,695	194,173	173,706	178,509	229,278
USA	292,284	287,859	295,922	285,802	288,405	307,138	335,745	348,714	305,492	354,956	492,537
Extra-EU	2,425,397	2,352,986	2,357,933	2,008,000	2,004,841	2,209,554	2,498,869	2,469,564	2,232,602	2,916,388	3,608,798
SADC EPA	33,607	28,386	28,377	25,241	30,066	30,708	34,575	35,458	30,891	42,076	43,134

Source: Own calculations based on UN COMTRADE

Table 31: Botswana’s exports to selected destination countries, by broad sector, 2014-2022 (USD millions)

Ex-post evaluation of the EU-SADC Economic Partnership Agreement

	2014	2015	2016	2017	2018	2019	2020	2021	2022	Av 2014-16	Av 2017-22	Change pre/post	CAGR 2016-22
Agriculture													
World	175.2	153.9	136.6	112.1	130.7	101.7	91.1	140.7	160.7	155.3	122.8	-20.9%	2.7%
Australia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-56.8%	-40.3%
Brazil	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-96.6%	..
China	3.0	1.6	1.2	0.1	0.0	0.0	1.8	1.6	0.1	1.9	0.6	-69.4%	-39.3%
India	0.0	0.0	0.2	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.0	-82.7%	-71.9%
Russia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-100.0%	-100.0%
Turkey	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	..	..
UK	46.6	43.8	28.2	22.2	16.9	0.1	0.0	0.4	0.1	39.5	6.6	-83.3%	-61.3%
USA	0.7	0.3	0.2	0.0	0.0	0.0	0.0	0.0	0.2	0.4	0.1	-84.6%	7.2%
EU27	71.2	76.7	58.7	43.4	51.5	32.4	7.4	1.8	1.0	68.9	22.9	-66.7%	-49.2%
Minerals													
World	225.9	109.1	39.9	32.6	61.3	35.6	66.9	169.1	408.1	124.9	129.0	3.2%	47.3%
Australia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	118.0%	35.7%
Brazil	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	..	..
China	0.0	0.0	0.0	0.0	0.0	0.0	0.0	94.0	258.4	0.0	58.7	10737401.6%	1684.6%
India	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	..	..
Russia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	350.0%	..
Turkey	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	..	..
UK	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	146.7%	19.9%
USA	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-99.1%	-46.9%
EU27	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	83.6%	-0.9%
Chemicals													
World	91.0	90.0	92.3	76.2	92.9	75.0	82.0	97.6	112.2	91.1	89.3	-2.0%	3.3%
Australia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-4.0%	-6.1%
Brazil	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	..	..
China	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	45.2%	11.0%
India	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1125.4%	-26.9%
Russia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	..	..
Turkey	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	..	..
UK	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-86.0%	-23.2%
USA	0.2	0.3	0.2	0.1	0.0	0.1	0.0	0.0	0.0	0.2	0.1	-76.6%	-22.4%
EU27	0.2	0.2	0.4	0.0	0.0	0.1	0.1	0.6	0.3	0.3	0.2	-21.2%	-2.8%
Textiles													
World	50.3	45.7	31.2	21.7	29.4	19.8	18.1	22.8	31.8	42.4	23.9	-43.6%	0.3%
Australia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	223.7%	3.7%
Brazil	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	..	..
China	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	97.7%	-22.6%
India	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	238.7%	54.3%
Russia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	..	..
Turkey	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	..	..
UK	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-64.5%	-30.1%
USA	11.1	9.0	4.8	0.0	0.0	0.0	0.0	0.1	0.0	8.3	0.0	-99.8%	-58.1%
EU27	0.0	0.1	0.2	0.0	0.0	0.0	0.0	0.1	0.0	0.1	0.0	-76.0%	-29.3%
Stone													
World	7,131.9	5,064.0	6,500.2	5,417.9	6,089.2	4,853.3	3,917.6	6,783.0	7,379.7	6,232.0	5,740.1	-7.9%	2.1%
Australia	0.0	0.0	0.0	0.0	0.0	0.1	0.6	0.2	0.0	0.0	0.1	367.9%	-56.8%
Brazil	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	79.6%	13.3%
China	57.5	36.5	42.7	16.1	0.0	0.0	0.0	0.0	0.2	45.5	2.7	-94.0%	-59.3%
India	1,155.4	783.4	1,105.6	1,163.4	1,340.2	1,140.9	912.0	1,289.4	1,275.9	1,014.8	1,187.0	17.0%	2.4%
Russia	0.0	3.0	0.0	0.0	0.0	2.5	8.9	0.0	0.0	1.0	1.9	92.2%	-63.3%
Turkey	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-81.5%	-100.0%
UK	10.2	18.3	60.6	17.9	34.2	17.7	2.1	2.3	7.2	29.7	13.6	-54.3%	-29.9%
USA	162.7	102.3	155.4	123.4	216.6	77.4	59.1	111.5	163.1	140.1	125.2	-10.7%	0.8%
EU27	1,956.1	1,235.9	1,443.5	1,357.5	1,427.8	1,058.4	927.1	1,757.2	1,601.8	1,545.2	1,355.0	-12.3%	1.7%
Metals													
World	402.8	354.8	266.3	24.0	30.4	31.3	21.1	35.4	45.1	341.3	31.2	-90.9%	-25.6%
Australia	0.1	2.1	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.7	0.0	-98.1%	43.7%
Brazil	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-100.0%	-73.3%
China	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-97.0%	-56.8%
India	1.2	0.6	1.1	0.6	0.6	0.3	0.9	0.8	4.1	1.0	1.2	20.9%	23.5%
Russia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	..	..
Turkey	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-100.0%	-100.0%
UK	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-86.2%	-24.5%
USA	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	-88.3%	-2.1%
EU27	83.0	60.6	30.0	0.0	0.0	0.1	0.0	0.4	0.5	57.9	0.2	-99.7%	-49.7%
Machinery													
World	78.6	68.8	56.0	57.1	53.8	42.9	47.3	46.4	49.1	67.8	49.4	-27.1%	-2.2%
Australia	0.1	0.0	0.0	0.4	1.0	0.0	0.0	0.2	0.1	0.0	0.3	998.9%	36.7%
Brazil	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	14.8%	-100.0%
China	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.1	0.1	0.4	0.0	-89.3%	-21.7%
India	0.7	0.0	0.2	0.1	0.4	0.1	0.1	0.2	0.1	0.1	0.2	150.5%	-7.6%
Russia	0.0	0.4	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.1	0.1	-54.6%	-100.0%
Turkey	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	-99.6%	-58.9%
UK	13.3	0.8	1.1	0.1	1.0	0.4	0.1	0.5	1.0	5.1	0.5	-89.7%	-1.5%
USA	5.5	7.3	4.5	1.2	0.4	0.6	0.5	0.5	0.8	5.8	0.7	-88.4%	-25.9%
EU27	15.3	3.8	3.5	4.1	5.8	1.0	2.2	3.7	2.9	7.5	3.3	-56.6%	-3.4%
Electronics													
World	86.7	131.7	137.5	120.6	143.2	106.3	100.4	131.7	168.6	118.7	128.5	8.2%	3.5%
Australia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-19.6%	-31.1%
Brazil	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-82.7%	-46.4%
China	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	-84.2%	-29.6%
India	0.0	0.0	0.2	0.1	0.0	0.0	0.1	0.0	0.0	0.1	0.0	-42.1%	-53.1%
Russia	0.0	0.0	0.0	0.0	0.1	0.0	0.1	0.0	0.0	0.0	0.0	..	..
Turkey	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-95.8%	-44.0%
UK	0.0	0.2	0.4	0.1	0.2	0.0	0.0	0.0	0.0	0.2	0.1	-67.5%	-37.0%
USA	0.2	0.4	0.1	0.1	0.4	0.2	0.2	0.2	0.2	0.2	0.2	-9.9%	16.8%
EU27	0.6	0.7	1.8	1.6	0.5	0.7	1.2	1.0	1.5	1.0	1.1	6.0%	-3.6%
Vehicles													
World	66.5	66.2	48.2	55.4	61.1	39.5	26.1	40.5	51.7	60.3	45.7	-24.2%	1.2%
Australia	0.0	4.0	0.4	0.0	0.2	0.0	0.1	0.0	0.2	1.5	0.1	-92.7%	-9.2%
Brazil	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-100.0%	..
China	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-98.7%	..
India	0.0	0.0	0.0	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.2	336932.7%	..
Russia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	..	..
Turkey	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-100.0%	-100.0%
UK	8.2	0.2	0.6	0.2	0.0	0.1	0.3	0.4	0.3	3.0	0.2	-93.0%	-8.8%
USA	1.4	1.3	0.8	1.1	1.3	1.2	0.2	3.3	6.6	1.2	2.3	96.3%	43.3%
EU27	11.2	0.9	1.5	4.0	14.4	0.3	0.3	0.4	1.2	4.5	3.4	-24.7%	-2.7%
Other													
World	11.0	8.4	11.5	8.2	19.2	2.2	2.0	3.9	3.1	10.3	6.4	-37.6%	-19.7%
Australia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	727.4%	32.0%
Brazil	0.0	0.0	0.0	0.0									

Table 32: Botswana’s imports from selected supplier countries, by broad sector, 2014-2022 (USD millions)

Ex-post evaluation of the EU-SADC Economic Partnership Agreement

	2014	2015	2016	2017	2018	2019	2020	2021	2022	Av 2014-16	Av 2017-22	Change pre/post	CAGR 2016-22
Agriculture													
World	796.4	781.6	755.0	749.0	882.5	935.8	925.3	1,094.4	1,188.0	777.7	962.5	23.8%	7.8%
Australia	0.0	0.3	3.1	0.2	0.1	0.0	0.3	0.1	0.0	1.2	0.1	-88.4%	-55.3%
Brazil	0.6	0.3	0.1	0.1	1.1	1.6	0.4	16.4	91.6	0.3	18.5	5594.5%	201.1%
China	2.3	2.5	1.9	1.9	3.3	2.7	2.7	3.6	3.4	2.2	2.9	30.0%	9.6%
India	1.9	1.4	0.7	0.7	0.8	1.0	1.5	1.8	1.1	1.3	1.1	-14.8%	7.6%
Russia		1.4	2.6	0.7	0.1	0.0	0.0	0.3	0.0	1.3	0.2	-85.8%	-69.4%
Turkey	0.6	0.3	0.2	0.5	0.9	0.6	0.6	0.5	0.3	0.4	0.6	56.4%	3.0%
UK	3.0	1.7	0.9	0.6	0.6	1.6	0.8	0.8	1.0	1.9	0.9	-50.9%	2.2%
USA	0.6	0.3	3.0	0.6	0.3	0.6	1.1	1.7	0.6	1.3	0.8	-37.2%	-23.9%
EU27	5.4	5.9	5.2	4.1	5.9	6.7	6.3	7.8	8.1	5.5	6.5	17.5%	7.8%
Minerals													
World	2,336.1	1,855.5	927.0	831.6	909.9	898.7	915.1	1,085.4	1,560.6	1,706.2	1,033.6	-39.4%	9.1%
Australia	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-97.3%	-11.2%
China	0.1	0.1	0.1	0.1	0.0	0.1	0.2	0.0	0.4	0.1	0.1	51.4%	29.8%
India	0.0	0.0	0.0	0.0	0.1	0.1	0.0	0.1	0.0	0.0	0.1	176.7%	21.4%
UK	0.2	0.1	0.1	0.6	0.1	0.1	0.0	0.1	0.0	0.2	0.2	-0.7%	-25.1%
USA	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.4	0.0	0.1	164.0%	134.6%
EU27	0.5	0.2	0.2	0.6	0.1	0.1	0.0	0.1	0.9	0.3	0.3	2.9%	30.5%
Chemicals													
World	655.1	631.8	598.8	550.6	572.5	598.3	619.0	796.9	750.3	628.6	647.9	3.1%	3.8%
Australia	1.8	0.1	0.1	0.1	0.2	0.5	2.0	1.2	2.4	0.7	1.1	60.8%	74.7%
Brazil	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	41.2%	3.4%
China	8.0	11.3	7.5	7.2	10.8	10.6	17.6	30.2	18.2	8.9	15.8	76.6%	15.9%
India	29.8	41.1	103.7	93.9	39.4	46.1	35.3	65.9	40.8	58.2	53.6	-8.0%	-14.4%
Russia	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	450.5%	31.6%
Turkey	0.0	0.1	0.1	0.0	0.1	0.2	0.2	0.2	0.1	0.1	0.1	84.8%	6.5%
UK	2.8	3.5	9.4	8.1	4.0	3.7	5.2	5.4	3.4	5.2	5.0	-5.2%	-15.6%
USA	8.1	6.4	3.7	3.0	8.2	7.4	6.1	9.3	8.2	6.1	7.0	15.7%	14.4%
EU27	27.6	32.2	40.4	32.4	28.4	31.2	40.1	59.8	55.3	33.4	41.2	23.3%	5.4%
Textiles													
World	303.3	284.7	251.3	228.9	261.9	230.5	202.5	261.3	264.1	279.7	241.5	-13.7%	0.8%
Australia	0.0	0.5	0.0	0.5	0.0	0.1	0.3	0.2	0.8	0.2	0.3	76.3%	74.8%
Brazil	0.1	0.0	0.2	0.1	0.2	0.2	0.2	0.2	0.1	0.1	0.2	92.8%	-7.4%
China	20.4	17.7	11.4	9.2	12.8	12.1	23.1	32.7	30.1	16.5	20.0	21.2%	17.5%
India	1.5	2.7	1.2	1.4	1.7	1.8	1.6	2.3	1.9	1.8	1.8	-0.6%	8.1%
Russia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.5%	-100.0%
Turkey	0.2	0.1	0.1	0.1	0.3	0.2	0.3	0.3	0.2	0.1	0.2	113.9%	20.6%
UK	10.0	9.7	1.5	0.6	1.4	0.6	1.0	0.9	2.5	7.1	1.2	-83.2%	8.4%
USA	0.9	1.1	0.9	0.6	0.7	0.7	0.7	1.7	1.7	1.0	0.8	-14.3%	10.5%
EU27	12.5	11.1	4.9	2.5	9.0	7.2	6.4	7.4	13.4	9.5	7.6	-19.5%	18.4%
Stone													
World	2,966.6	2,556.4	1,782.8	1,437.0	1,892.6	1,974.3	2,122.1	3,064.1	2,320.1	2,435.2	2,135.0	-12.3%	4.5%
Brazil	0.0	0.0	0.0	0.1	0.1	0.0	0.5	0.0	0.1	0.0	0.1	921.0%	87.4%
China	5.6	6.4	4.4	3.4	4.6	5.8	5.8	6.0	4.2	5.4	5.0	-8.9%	-0.7%
India	26.4	4.7	28.5	79.8	139.6	146.5	117.5	280.1	274.2	19.9	172.9	768.8%	45.8%
Russia	5.6	27.8	21.2	20.2	43.5	142.5	111.3	173.4	49.5	18.2	90.1	394.3%	15.2%
Turkey	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1377.9%	56.4%
UK	1.3	8.3	37.6	2.2	10.9	22.1	2.3	0.4	17.4	15.7	9.2	-41.3%	-12.0%
USA	43.4	22.3	3.1	11.1	12.3	74.1	2.5	4.4	44.2	22.9	24.8	8.0%	55.4%
EU27	294.4	193.2	182.7	69.0	126.4	221.3	507.5	1,183.4	476.7	223.5	430.7	92.8%	17.3%
Metals													
World	312.8	287.8	278.0	239.9	292.6	335.1	266.9	397.1	364.9	292.9	316.1	7.9%	4.6%
Australia	0.3	2.3	0.1	0.0	0.9	1.1	2.3	2.8	5.8	0.9	2.1	134.6%	117.5%
Brazil	0.2	0.1	0.2	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.0	-74.7%	-14.0%
China	14.3	25.0	15.5	10.8	9.2	13.9	11.9	19.5	16.7	18.2	13.7	-25.1%	1.3%
India	2.0	3.0	12.7	4.7	15.0	29.0	4.3	4.7	6.0	5.9	10.6	80.5%	-11.7%
Russia			0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	800.9%	-32.4%
Turkey	0.0	0.4	0.0	0.1	0.1	0.1	0.1	0.2	4.4	0.2	0.8	420.3%	114.2%
UK	0.6	1.2	2.0	0.8	0.9	0.4	0.1	0.4	0.3	1.3	0.5	-61.8%	-28.0%
USA	3.0	2.9	3.1	1.7	1.8	1.3	0.9	0.9	0.8	3.0	1.2	-59.0%	-20.2%
EU27	6.3	2.9	4.6	6.0	3.7	25.7	1.6	3.6	2.9	4.6	7.2	58.5%	-7.3%
Machinery													
World	674.1	651.1	601.6	508.3	612.0	555.1	520.2	688.2	715.8	642.2	599.9	-6.6%	2.9%
Australia	2.1	2.0	2.3	2.7	1.7	2.3	4.2	4.1	10.2	2.1	4.2	97.4%	28.7%
Brazil	0.8	0.5	0.6	0.3	0.3	0.6	0.9	0.9	2.5	0.6	0.9	46.0%	27.5%
China	23.2	23.6	24.2	17.8	34.0	32.7	56.8	47.9	58.5	23.7	41.3	74.4%	15.8%
India	8.8	6.8	5.4	5.7	9.4	8.2	7.2	18.6	24.8	7.0	12.3	76.0%	28.8%
Russia	0.2	0.2	0.0	0.1	0.3	0.0	0.1	0.1	0.1	0.1	0.1	-37.5%	109.8%
Turkey	1.5	0.6	0.5	1.7	1.9	2.1	1.3	4.7	3.0	0.9	2.5	187.3%	34.2%
UK	27.5	12.9	10.7	12.3	17.8	19.9	8.6	18.4	18.9	17.0	16.0	-5.9%	10.0%
USA	12.0	19.8	16.9	19.7	29.6	22.9	19.8	26.4	24.2	16.2	23.8	46.7%	6.2%
EU27	86.1	59.2	51.4	48.0	67.7	58.2	42.7	73.1	70.7	65.5	60.1	-8.4%	5.4%
Electronics													
World	356.8	372.0	340.0	291.9	353.3	377.6	339.9	370.7	379.4	356.2	352.1	-1.2%	1.8%
Australia	0.9	3.5	0.1	0.2	0.3	1.1	5.0	1.9	5.4	1.5	2.3	52.1%	85.3%
Brazil	0.0	4.1	0.1	0.0	0.0	0.1	0.0	0.1	0.8	1.4	0.2	-86.9%	50.0%
China	12.3	15.4	19.3	15.2	27.2	38.7	33.8	42.2	62.2	15.7	36.5	133.0%	21.5%
India	2.2	2.5	5.1	1.1	5.2	10.4	2.5	2.5	6.6	3.3	4.7	44.2%	4.6%
Russia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	63.4%	95.2%
Turkey	0.0	0.0	0.0	0.2	0.4	0.3	0.3	0.3	0.3	0.0	0.3	1047.6%	38.8%
UK	4.9	7.6	5.7	8.1	7.3	13.7	2.5	2.5	4.5	6.0	6.5	6.9%	-3.8%
USA	7.8	5.8	4.8	4.3	5.5	3.4	3.3	7.0	3.1	6.2	4.4	-28.0%	-7.2%
EU27	58.1	63.0	72.2	47.9	65.9	65.2	44.9	51.6	55.9	64.4	55.2	-14.3%	-4.2%
Vehicles													
World	629.4	527.2	459.5	402.3	531.9	645.5	575.2	616.2	481.9	538.7	542.1	0.6%	0.8%
Australia	3.3	6.4	1.2	0.4	4.9	1.0	0.9	1.1	4.4	3.6	2.1	-41.3%	24.8%
Brazil	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.9	0.1	1.2	689.9%	154.1%
China	3.5	3.7	3.6	5.5	8.7	6.8	8.9	13.9	6.6	3.6	8.4	131.8%	10.3%
India	2.1	1.0	0.5	0.8	0.7	0.8	2.1	7.5	5.6	1.2	2.9	149.6%	51.4%
Turkey	0.1	0.2	0.0	1.8	0.1	0.0	0.1	0.0	0.0	0.1	0.4	220.4%	7.5%
UK	6.8	9.2	3.4	8.8	1								

Table 33: Eswatini's exports to selected destination countries, by broad sector, 2012-2021 (USD millions)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Av 2012-16	Av 2017-21	Change pre/post	CAGR 2016-21
Agriculture														
World	674.36	751.96	661.93	633.51	604.93	567.14	609.31	715.99	670.86	779.91	665.34	668.64	0.5%	5.2%
Australia	3.30	4.06	1.32	0.74	3.35	3.04	0.56	0.10	0.01	0.02	2.55	0.75	-70.7%	-65.9%
Brazil		0.00			0.00			0.00	0.00	0.00	0.00	0.00	2900.0%	181.3%
China	0.03	0.00	0.00	0.00	0.00	0.59	23.83	0.23	0.00	0.00	0.01	4.93	79623.6%	-56.5%
India		0.00		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	282.7%	176.3%
Russia	0.14	0.19	0.84	0.62	0.61	0.26	1.23	1.81	1.39	2.00	0.48	1.34	178.4%	27.0%
Turkey				0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	253.3%	-52.9%
UK	14.57	10.14	31.50	11.57	44.96	7.93	17.48	9.36	44.08	38.09	22.55	23.39	3.7%	-3.3%
USA	3.87	5.13	13.48	14.26	11.20	13.32	9.86	21.26	23.86	14.97	9.59	16.65	73.7%	6.0%
EU27	321.52	385.12	260.23	199.61	142.87	62.17	70.60	113.25	91.63	93.76	261.87	86.28	-67.1%	-8.1%
Minerals														
World	116.72	96.05	53.80	14.12	15.09	21.37	18.48	16.76	19.90	24.43	59.15	20.19	-65.9%	10.1%
China	11.70	54.01	34.46								20.04	0.00	-100.0%	..
India	0.00										0.00	0.00	-100.0%	..
UK		0.00					0.00				0.00	0.00	-53.3%	..
USA		0.00		0.00							0.00	0.00	-100.0%	..
EU27		0.00		0.00			0.00	0.00			0.00	0.00	16.7%	..
Chemicals														
World	736.15	846.45	970.11	879.58	836.53	922.91	894.37	950.72	798.78	932.91	853.76	899.94	5.4%	2.2%
Australia		0.01	0.01	0.01	0.10	0.06	0.08	0.02	0.03	0.03	0.03	0.04	56.8%	-22.0%
Brazil		0.00				0.00		0.00	0.00	0.00	0.00	0.00	17940.0%	..
China	0.00	0.00	0.00	0.00		0.01	0.01	0.00	0.00	0.00	0.00	0.00	3838.3%	..
India		0.00	0.00			0.00	0.00	0.00	0.02	0.01	0.00	0.00	2193.2%	..
Russia					0.00				0.00		0.00	0.00	1250.0%	-100.0%
Turkey				0.00	0.01		0.00	0.00			0.00	0.00	-98.7%	-100.0%
UK	0.03	0.03	0.02	0.06	0.83	0.11	0.03	0.06	0.08	0.06	0.19	0.07	-65.8%	-41.4%
USA	0.00	0.02	0.01	0.00	1.03	0.26	0.43	0.15	0.06	0.18	0.21	0.22	2.2%	-29.3%
EU27	0.32	4.05	8.62	6.71	8.38	12.78	8.09	6.92	6.08	9.94	5.62	8.76	56.0%	3.5%
Textiles														
World	193.73	192.45	222.79	180.45	197.52	225.77	232.58	242.00	199.82	262.45	197.39	232.53	17.8%	5.8%
Australia	0.00	0.00	0.01	0.00	0.05	0.02	0.01	0.00	0.00	0.00	0.01	0.01	-57.3%	-43.1%
China		0.00	0.03	0.00	0.00	0.01	0.00	0.00	0.00	0.00	0.01	0.00	-98.6%	-57.7%
India	0.00	0.00		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.9%	-27.0%
Russia				0.00							0.00	0.00	-100.0%	..
Turkey				0.00				0.00	0.00		0.00	0.00	84.6%	..
UK	0.02	0.04	0.07	0.65	0.57	1.58	3.51	1.37	1.48	1.80	0.27	1.95	622.3%	25.7%
USA	57.90	48.91	43.47	3.40	4.89	0.42	1.12	0.53	1.74	2.64	31.71	1.29	-95.9%	-11.6%
EU27	0.31	0.26	0.41	0.67	0.58	1.58	3.54	1.38	1.51	1.83	0.45	1.97	341.8%	25.9%
Stone														
World	4.91	6.40	4.99	3.72	3.13	2.91	3.14	3.19	1.28	1.46	4.63	2.40	-48.3%	-14.2%
Australia	0.01	0.05	0.04	0.04	0.04	0.03	0.03	0.02	0.01	0.04	0.04	0.02	-28.6%	-2.4%
Brazil	0.00	0.00							0.00	0.00	0.00	0.00	-57.1%	..
China			0.01	0.00	0.00		0.00				0.00	0.00	-92.3%	..
India	0.00	0.00	0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00	-78.6%	67.0%
Russia				0.00							0.00	0.00	-100.0%	..
UK	0.00	0.02	0.03	0.04	0.03	0.04	0.03	0.05	0.02	0.08	0.03	0.04	78.5%	18.1%
USA	0.00	0.05	0.01	0.01	0.01	0.30	0.12	0.06	0.06	0.09	0.02	0.13	680.5%	72.5%
EU27	0.02	0.07	0.08	0.11	0.07	0.07	0.05	0.09	0.04	0.11	0.07	0.07	6.1%	9.2%
Metals														
World	11.19	8.96	8.22	4.59	4.72	6.49	8.29	6.70	5.27	7.00	7.54	6.75	-10.5%	8.2%
Brazil	0.00	0.01									0.00	0.00	-100.0%	..
China			0.00	0.03		0.02	0.00	0.00	0.00	0.00	0.01	0.00	-46.1%	..
India			0.01		0.29	0.04	0.02			0.82	0.06	0.18	193.6%	23.2%
UK		0.00			0.00	0.51	0.00		0.00		0.00	0.10	49367.4%	-100.0%
USA	0.12	0.11	0.19	0.17	0.19	0.28	0.27	0.18	0.09	0.21	0.16	0.21	32.6%	1.3%
EU27	0.05	0.01	0.02	0.00	0.33	0.51	0.00	0.01	0.00	0.01	0.08	0.11	30.0%	-56.2%
Machinery														
World	29.05	34.78	35.52	28.29	26.73	32.17	39.09	40.93	36.49	36.50	30.87	37.03	20.0%	6.4%
Australia					0.00			0.07		0.00	0.00	0.01	404176.5%	8.0%
China	0.02				0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.01	14.4%	-24.2%
India						0.00	0.02			0.00	0.00	0.01	..	..
Turkey					0.00	0.00	0.00	0.00			0.00	0.00	653.3%	-100.0%
UK	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.02	0.01	0.00	-21.0%	129.3%
USA	0.00	0.00	0.00	0.01	0.01	0.46	0.30	0.03	0.02	0.00	0.00	0.16	3664.4%	-34.6%
EU27	0.11	0.12	0.08	0.16	0.09	0.08	0.13	0.12	0.07	0.20	0.11	0.12	10.8%	17.9%
Electronics														
World	1.17	1.31	1.07	1.06	1.08	1.83	11.49	1.63	1.43	0.79	1.14	3.43	201.3%	-6.1%
Australia				0.00							0.00	0.00	-100.0%	..
China	0.00	0.00	0.00	0.00	0.00		0.00			0.00	0.00	0.00	-63.7%	-8.2%
India				0.00		0.19	0.09	0.09	0.00	0.02	0.00	0.08	359599.1%	..
Russia				0.00							0.00	0.00	-100.0%	..
Turkey				0.00			0.00	0.00	0.00		0.00	0.00	321.3%	..
UK		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	425.2%	106.7%
USA		0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.01	1995.7%	52.9%
EU27	0.00	0.00	0.00	0.00	0.02	0.02	0.01	0.05	0.07	0.04	0.00	0.04	887.2%	21.9%
Vehicles														
World	8.16	7.78	4.89	6.49	4.32	5.76	8.44	12.45	9.06	4.76	6.33	8.09	28.0%	2.0%
Brazil		0.00									0.00	0.00	-100.0%	..
UK	0.00		0.01		0.00	0.03			0.00		0.00	0.01	176.1%	-100.0%
USA			0.07	0.01	0.03	0.00	0.00	0.01	0.01		0.02	0.00	-79.6%	-100.0%
EU27	0.00	0.00	0.02		0.03	0.04			0.00	0.02	0.01	0.01	21.3%	-10.3%
Other														
World	68.66	86.96	46.96	67.99	21.61	14.14	16.32	10.62	8.67	10.35	58.44	12.02	-79.4%	-13.7%
Australia	0.00	0.01	0.00		0.00			0.00	0.00	0.00	0.00	0.00	-97.0%	-39.0%
China			0.00	0.00				0.00			0.00	0.00	-93.8%	..
India	0.00						0.00		0.00		0.00	0.00	-82.1%	..
UK	0.00	0.04	0.07	0.00	0.00	0.01	0.00	0.00	0.00	0.00	0.02	0.00	-83.3%	-1.2%
USA	0.03	0.01	0.01	0.00	0.04	0.02	0.00	0.01	0.00	0.07	0.02	0.02	39.6%	13.1%

Table 34: Eswatini's imports from selected supplier countries, by broad sector, 2012-2021 (USD millions)

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	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Av 2012-16	Av 2017-21	Change pre/post	CAGR 2016-21
Agriculture														
World	402.12	327.93	331.55	302.75	326.69	334.57	389.98	371.91	362.52	447.23	338.21	381.24	12.7%	6.5%
Australia	0.03	0.23	0.15	0.05	1.05	0.87	0.23	0.18	0.32	9.91	0.30	2.30	665.0%	56.8%
Brazil	0.19	0.20	0.10	0.40	0.11	1.09	1.59	1.33	1.61	2.96	0.20	1.72	753.0%	93.9%
China	2.31	1.62	2.14	1.31	1.32	2.09	2.05	2.36	2.13	3.04	1.74	2.33	34.0%	18.1%
India	0.17	0.31	0.39	0.61	0.77	0.45	30.63	0.88	4.05	10.46	0.45	9.29	1958.2%	68.7%
Russia	0.00			1.22	7.94	4.61	6.24	1.40	0.33	0.00	1.83	2.52	37.4%	-78.2%
Turkey	0.07	0.02	0.08	0.01	0.05	0.10	0.10	0.05	0.22	1.03	0.04	0.30	571.7%	86.0%
UK	5.34	1.92	2.65	2.68	1.80	0.99	2.18	2.01	2.10	1.62	2.88	1.78	-38.2%	-2.1%
USA	1.72	1.88	1.58	2.02	2.04	7.28	6.92	8.63	4.13	5.29	1.85	6.45	249.0%	21.1%
EU27	9.04	4.99	6.49	10.53	17.26	11.07	12.43	11.85	10.78	14.93	9.66	12.21	26.4%	-2.9%
Minerals														
World	351.25	370.75	311.27	209.95	197.46	211.34	308.42	331.14	273.80	401.12	288.14	305.16	5.9%	15.2%
China		0.06	0.00	0.09	0.01	0.06	0.05	0.02	2.93	0.07	0.03	0.63	2001.3%	58.3%
India				0.41	4.16	5.34	3.95	10.73	14.86	15.68	0.92	10.11	1004.7%	30.4%
Turkey			0.00			10.64	12.62	10.28	0.01	0.00	0.00	6.71	2124892.1%	..
UK				0.00	0.00	0.00	0.02	0.01	0.01	0.01	0.00	0.01	2141.1%	40.3%
USA	0.01	0.02	0.02	0.04	0.00	0.00	0.00	0.01	0.00	0.01	0.02	0.00	-79.5%	11.1%
EU27	1.30	1.35	0.75	0.44	0.42	0.54	0.31	4.52	5.37	0.28	0.85	2.20	158.6%	-7.5%
Chemicals														
World	320.50	304.39	308.89	308.80	298.55	307.68	333.81	325.80	322.04	405.12	308.23	338.89	9.9%	6.3%
Australia	0.08	0.10	0.08	0.16	0.04	0.02	0.02	0.12	0.07	0.18	0.09	0.08	-9.0%	33.7%
Brazil	4.29	0.50	0.31	0.04	0.18	0.17	0.61	0.27	0.15	0.33	1.06	0.31	-71.2%	12.9%
China	11.04	4.61	5.19	7.65	9.50	15.97	18.09	20.56	14.74	25.89	7.60	19.05	150.7%	22.2%
India	15.66	17.38	17.36	40.37	24.12	24.56	22.55	23.27	31.16	26.21	22.98	25.55	11.2%	1.7%
Turkey	0.01	0.01	0.01	0.00	0.03	0.07	0.22	0.11	0.21	0.17	0.01	0.15	1235.4%	43.5%
UK	0.87	0.62	0.39	0.98	2.12	2.10	3.29	3.75	3.28	6.51	1.00	3.79	280.4%	25.2%
USA	6.61	5.64	5.91	10.32	8.70	7.77	11.16	15.12	20.20	21.85	7.44	15.22	104.7%	20.2%
EU27	27.59	14.87	14.65	34.04	40.70	38.42	42.12	39.21	44.79	61.93	26.37	45.29	71.7%	8.8%
Textiles														
World	182.58	199.64	186.99	163.98	174.51	202.72	226.38	220.76	190.32	241.68	181.54	216.37	19.2%	6.7%
Australia	0.01	0.03	0.01	0.04	0.02	0.00	0.00	0.00	0.01	0.00	0.02	0.00	-86.8%	-43.3%
Brazil	0.02	0.02	0.02	0.02	0.01	0.02	0.02	0.03	0.00	0.01	0.02	0.02	6.2%	-4.1%
China	46.75	48.94	47.44	40.08	36.90	57.78	76.17	77.53	67.34	93.36	44.02	74.44	69.1%	20.4%
India	0.47	0.62	0.45	1.71	3.15	0.76	0.52	0.56	0.63	0.90	1.28	0.68	-47.2%	-22.2%
Russia				0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4618.2%	..
Turkey	0.01	0.10	0.18	0.00	0.03	0.02	0.01	0.01	0.15	0.07	0.06	0.05	-16.3%	18.6%
UK	0.03	0.04	0.02	0.04	0.05	0.06	0.27	0.12	0.24	0.33	0.03	0.20	495.4%	45.6%
USA	0.30	0.65	2.16	1.54	0.30	1.64	0.96	0.55	0.91	0.82	0.99	0.98	-1.1%	22.6%
EU27	0.38	0.64	0.37	1.87	6.64	2.63	7.83	10.68	5.20	1.77	1.98	5.62	184.0%	-23.2%
Stone														
World	20.36	20.28	20.56	19.82	20.15	17.84	21.39	19.68	21.82	21.68	20.23	20.48	1.2%	1.5%
Australia		0.00		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-18.3%	-27.5%
Brazil	0.04	0.09	0.02	0.02	0.00	0.02	0.00	0.04	0.00	0.02	0.03	0.02	-50.7%	158.7%
China	0.64	0.67	0.69	0.63	0.64	0.53	1.04	0.93	0.68	0.65	0.65	0.77	17.4%	0.6%
India	0.00	0.04	0.10	0.31	0.55	0.10	0.11	0.10	0.11	0.11	0.20	0.10	-48.6%	-28.2%
Turkey	0.03	0.01	0.34	1.22	0.19	0.02	0.87	0.05	0.07	0.03	0.36	0.21	-42.0%	-32.2%
UK	0.00	0.00	0.01	0.01	0.00	0.07	0.04	0.01	0.01	0.01	0.00	0.03	610.8%	43.0%
USA	0.01	0.04	0.68	0.55	0.20	0.04	0.04	0.08	0.03	0.15	0.30	0.07	-76.4%	-5.6%
EU27	0.02	0.01	0.22	0.11	0.65	0.15	0.44	0.22	0.33	0.05	0.20	0.24	17.6%	-41.0%
Metals														
World	96.80	101.92	99.46	85.22	99.39	104.80	113.85	102.74	88.36	119.71	96.56	105.89	9.7%	3.8%
Australia		0.00	0.00		0.00	0.00	0.00	0.06	0.00	0.03	0.00	0.02	5301.2%	132.9%
Brazil	0.15	0.06		0.04	0.14	0.05	0.00	0.10	0.00	0.00	0.08	0.03	-60.8%	-62.1%
China	0.81	2.85	2.18	2.59	1.81	1.74	1.65	3.75	1.98	4.35	2.05	2.69	31.5%	19.1%
India	0.00	0.15	0.01	0.85	1.61	0.20	0.04	0.25	0.05	0.05	0.52	0.12	-77.0%	-49.5%
Turkey	0.00	1.89		0.00	0.03	0.02	0.00	0.00	0.19	0.03	0.38	0.05	-87.7%	1.5%
UK	0.07	0.24	0.45	0.02	0.02	0.10	0.11	0.02	0.03	0.03	0.16	0.06	-64.8%	5.4%
USA	0.23	2.81	7.03	4.09	3.69	0.51	0.26	0.04	0.07	0.05	3.57	0.19	-94.8%	-57.2%
EU27	0.36	0.52	1.50	0.27	4.10	0.31	0.36	0.29	0.40	0.62	1.35	0.40	-70.6%	-31.4%
Machinery														
World	151.44	153.13	140.98	138.19	138.00	148.93	169.88	155.49	131.04	215.02	144.35	164.07	13.7%	9.3%
Australia	0.02	0.01	0.03	0.00	0.01	0.01	0.01	0.03	0.03	0.01	0.01	0.02	62.5%	16.6%
Brazil	0.50	0.76	0.08	0.87	1.45	0.50	0.05	0.12	0.66	0.07	0.73	0.28	-61.9%	-45.3%
China	7.47	5.16	5.73	4.63	7.44	9.50	7.43	11.15	14.03	64.25	6.09	21.28	249.5%	53.9%
India	0.19	0.06	5.07	8.20	1.35	3.32	10.57	1.24	1.43	1.72	2.98	3.65	22.8%	4.8%
Russia	0.00	0.00		0.00	0.00		0.00			0.01	0.00	0.00	158.0%	65.5%
Turkey	0.04	0.11	0.07	0.13	0.07	1.43	0.06	0.29	0.04	0.13	0.08	0.39	362.7%	13.1%
UK	1.08	1.38	4.54	0.64	0.61	0.54	0.27	1.44	0.68	0.50	1.65	0.69	-58.4%	-3.9%
USA	1.64	2.18	2.92	3.20	3.25	2.30	2.64	3.57	5.03	3.12	2.64	3.33	26.3%	-0.8%
EU27	7.47	10.87	9.06	9.39	8.04	5.96	6.79	8.83	5.05	10.75	8.97	7.48	-16.6%	6.0%
Electronics														
World	82.68	74.59	74.12	70.99	70.08	86.03	90.90	89.66	72.05	92.24	74.49	86.18	15.7%	5.6%
Australia	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.02	0.00	0.01	1176.4%	95.7%
Brazil	0.03	0.01		0.05	0.00	0.01	0.02	0.01	0.02	0.00	0.02	0.01	-47.6%	0.1%
China	9.06	4.75	3.68	4.33	8.11	15.39	7.11	12.28	12.42	11.83	5.98	11.80	97.2%	7.9%
India	0.46	0.52	0.09	5.62	1.29	1.11	0.10	0.26	0.72	0.43	1.59	0.52	-67.2%	-19.6%
Russia	0.00				0.00	0.00	0.01	0.01	0.01	0.03	0.00	0.01	9533.8%	119.3%
Turkey					0.00	0.00	0.03	0.01	0.01	0.03	0.00	0.01	377415.8%	326.7%
UK	0.04	0.16	0.03	0.01	0.14	0.10	0.38	0.16	0.08	0.05	0.08	0.15	104.9%	-17.3%
USA	0.45	0.48	3.90	2.90	0.35	0.39	0.59	0.40	0.28	0.47	1.62	0.43	-73.7%	6.3%
EU27	1.57	2.25	1.43	1.25	1.27	0.93								

Table 35: Lesotho's exports to selected destination countries, by broad sector, 2015-2021 (USD millions)

	2015	2016	2017	2018	2019	2020	2021	Av 2015-16	Av 2017-21	Change pre/post	CAGR 2016-21
Agriculture											
World	60.35	87.67	90.07	89.03	77.23	84.06	108.84	74.01	89.85	21.4%	4.4%
Australia	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-21.9%	2.6%
China		0.00	0.02	0.00	0.02	0.00	0.00	0.00	0.01	11856.2%	37.2%
India		0.00	0.01	0.02	0.00	0.07	0.00	0.00	0.02	128838.1%	-49.7%
UK		0.31	0.29	0.15	0.36	0.30	0.28	0.15	0.28	79.2%	-1.7%
USA	0.00	0.15	0.36	0.36	0.16	0.32	0.22	0.08	0.28	271.2%	7.8%
EU27	0.29	1.74	2.64	1.86	2.76	2.92	4.15	1.01	2.87	182.4%	19.0%
Minerals											
World	2.00	1.90	2.45	1.92	1.75	1.38	1.83	1.95	1.87	-4.3%	-0.7%
Chemicals											
World	1.79	1.95	2.59	3.34	4.94	4.90	4.61	1.87	4.08	118.0%	18.8%
Australia		0.00			0.00	0.12	0.00	0.00	0.02	1421.7%	-0.4%
China		0.00	0.00	0.00	0.00	0.01	0.02	0.00	0.01	22864.1%	222.5%
India		0.02	0.00	0.00	0.04	0.09	0.00	0.01	0.03	122.8%	-76.5%
UK		0.00			0.00	0.00	0.00	0.00	0.00	36700.0%	285.4%
USA		0.00	0.00	0.00	0.00	0.05		0.00	0.01	11113.6%	-100.0%
EU27	0.05	0.01	0.00	0.00	0.02	0.00	0.00	0.03	0.00	-84.1%	-17.2%
Textiles											
World	313.91	495.76	543.41	559.97	564.05	427.15	564.25	404.84	531.77	31.4%	2.6%
Australia	0.54	0.59	0.68	0.95	0.66	0.46	0.26	0.56	0.60	6.8%	-14.9%
Brazil	0.01	0.02	0.07	0.00				0.01	0.02	11.5%	-100.0%
China	0.01	0.66	0.00	1.96	25.23	0.73	0.17	0.34	5.62	1561.1%	-23.6%
India	0.05	0.00	0.00	0.07	0.06	0.09	0.00	0.02	0.04	84.0%	19.2%
Turkey		0.02	0.01	0.00	0.00	0.00		0.01	0.00	-87.4%	-100.0%
UK	0.10	0.22	0.33	0.24	0.42	0.35	1.04	0.16	0.47	197.4%	37.0%
USA	175.86	274.73	294.45	294.34	310.04	225.19	286.38	225.29	282.08	25.2%	0.8%
EU27	1.31	2.06	4.36	3.91	4.45	6.45	5.16	1.68	4.87	189.3%	20.2%
Stone											
World	184.54	0.11	0.36	138.01	167.87	267.02	175.88	92.33	149.83	62.3%	334.1%
USA		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	344.0%	15.5%
EU27	184.45		0.00	137.81	167.53	266.58	175.42	92.23	149.47	62.1%	..
Metals											
World	1.77	2.46	1.56	1.62	1.94	1.62	1.77	2.12	1.70	-19.7%	-6.4%
India	0.10	0.06	0.05	0.19	0.16	0.09	0.05	0.08	0.11	41.5%	-4.4%
USA		0.00	0.00	0.01	0.00	0.00	0.00	0.00	0.00	1431.8%	-12.5%
EU27	0.04	0.01	0.01	0.01	0.00	0.00	0.00	0.02	0.00	-89.6%	-67.2%
Machinery											
World	2.25	4.20	9.43	12.12	12.28	9.85	15.39	3.22	11.81	266.4%	29.7%
China		0.00	0.00	0.00	0.00	0.01	0.01	0.00	0.01	4028.9%	111.8%
UK		0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.01	15019.5%	99.3%
USA		0.01	0.12	0.02	0.00	0.12	0.10	0.01	0.07	1045.2%	50.7%
EU27		0.11	0.10	0.03	0.01	0.01	0.06	0.06	0.04	-29.1%	-13.1%
Electronics											
World	20.52	38.50	46.73	53.40	40.16	30.10	44.96	29.51	43.07	46.0%	3.2%
China		0.00	0.00	0.00		0.00	0.00	0.00	0.00	2538.3%	126.6%
India		0.01	0.00		0.00	0.00	0.00	0.00	0.00	-90.6%	-80.6%
USA		0.00	0.01	0.00	0.00	0.01	0.00	0.00	0.00	19303.9%	57.9%
EU27	0.00	0.02	0.01	0.00	0.10	0.01	0.03	0.01	0.03	116.8%	6.9%
Vehicles											
World	2.37	4.91	3.29	5.15	4.01	1.99	8.55	3.64	4.60	26.4%	11.7%
EU27		0.03	0.00	0.03	0.00		0.05	0.02	0.02	-3.8%	9.3%
Other											
World	3.49	4.04	5.43	5.75	4.51	2.36	4.08	3.76	4.43	17.6%	0.2%
China		0.00	0.00	0.00		0.00	0.00	0.00	0.00	263.4%	6.1%
USA		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	390.5%	30.9%
EU27		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.3%	4.7%

Note: Countries without consistent sectoral trade omitted

Source: Own calculations based on UN COMTRADE

Table 36: Lesotho's imports from selected supplier countries, by broad sector, 2015-2021 (USD millions)

Ex-post evaluation of the EU-SADC Economic Partnership Agreement

	2015	2016	2017	2018	2019	2020	2021	Av 2015-16	Av 2017-21	Change pre/post	CAGR 2016-21
Agriculture											
World	323.64	325.41	354.59	343.07	347.29	306.70	385.86	324.52	347.50	7.1%	3.5%
Australia	0.00	0.00		0.00			0.00	0.00	0.00	-56.5%	-17.1%
Brazil	0.11	0.13		0.01	0.01	0.00	0.01	0.12	0.01	-95.6%	-45.0%
China	4.24	3.26		2.00	4.17	0.38	0.65	3.75	1.44	-61.6%	-27.6%
India	0.04	0.06		0.07	0.01	0.00	0.12	0.05	0.04	-14.6%	15.5%
Turkey	0.00				0.13		0.00	0.00	0.03	6922.4%	..
UK	0.00	0.00		0.02	0.24	0.02	0.14	0.00	0.08	19592.8%	342.3%
USA	0.10	1.25		0.05	0.13	0.34	0.18	0.68	0.14	-79.3%	-31.8%
EU27	3.15	5.74		1.62	3.97	4.81	4.73	4.45	3.03	-32.0%	-3.8%
Minerals											
World	201.11	172.90	232.30	229.91	209.79	152.80	241.04	187.01	213.17	14.0%	6.9%
China	0.04	0.03		0.02	0.16	0.10	0.02	0.04	0.06	60.1%	-9.1%
Turkey	0.28	0.27		0.33	0.26	0.18	0.26	0.27	0.21	-25.0%	-0.8%
UK		0.00		0.00		0.00		0.00	0.00	-79.4%	-100.0%
USA	0.06	0.13					0.02	0.09	0.00	-96.0%	-32.1%
EU27	0.12	0.10		0.08	0.10	0.04	0.00	0.11	0.04	-60.4%	-77.2%
Chemicals											
World	166.08	160.93	167.01	161.70	160.45	152.82	175.35	163.50	163.46	0.0%	1.7%
Australia	0.00	0.00		0.08	0.01	0.01	0.01	0.00	0.02	409.6%	23.6%
Brazil	0.00	0.00					0.00	0.00	0.00	-42.6%	11.1%
China	4.13	2.91		3.58	3.67	3.90	5.82	3.52	3.39	-3.6%	14.9%
India	14.44	34.97		17.53	31.60	35.73	14.20	24.71	19.81	-19.8%	-16.5%
Turkey	0.08	0.06		0.87	0.31	0.42	0.54	0.07	0.43	486.8%	53.4%
UK	0.01	0.34		0.34	0.21	0.37	0.48	0.17	0.28	62.1%	7.2%
USA	0.82	1.57		0.68	0.68	0.58	3.40	1.20	1.07	-10.8%	16.7%
EU27	4.92	6.87		5.00	4.24	5.00	11.44	5.90	5.14	-12.9%	10.7%
Textiles											
World	346.10	312.54	388.24	376.55	379.10	288.97	409.23	329.32	368.42	11.9%	5.5%
Australia	0.00	0.00		0.02	0.00	0.00	0.16	0.00	0.04	922.3%	137.5%
Brazil	0.04	0.79		0.03	0.03	0.02	0.03	0.42	0.02	-95.1%	-47.4%
China	44.85	41.71	0.01	65.22	78.74	58.06	106.40	43.28	61.68	42.5%	20.6%
India	15.62	8.48		16.23	16.36	11.48	8.35	12.05	10.48	-13.0%	-0.3%
Turkey		0.00		0.00	0.14	0.05	0.05	0.00	0.05	12400.5%	129.9%
UK	0.00	0.01		0.13	0.14	0.08	0.13	0.01	0.09	1565.9%	71.6%
USA	3.60	3.12		0.32	0.49	0.76	1.20	3.36	0.55	-83.5%	-17.4%
EU27	0.45	0.49		2.52	1.18	0.54	1.51	0.47	1.15	143.9%	25.1%
Stone											
World	11.99	13.18	13.59	14.52	13.84	10.66	15.50	12.58	13.62	8.2%	3.3%
Australia	0.00			0.00	0.00		0.00	0.00	0.00	1314.5%	..
Brazil	0.00	0.00						0.00	0.00	-100.0%	-100.0%
China	0.92	0.76		0.14	0.17	0.10	0.15	0.84	0.11	-86.7%	-27.4%
India	0.00	0.00		0.00	0.13	0.03	0.01	0.00	0.04	5419.8%	90.9%
UK		0.00		0.01	0.00	0.01	0.02	0.00	0.01	2168.3%	90.6%
USA	0.00	0.00		0.06	0.01	0.22	0.02	0.00	0.06	18342.1%	128.9%
EU27	0.00	0.00		0.01	0.02	0.02	0.03	0.00	0.01	330.7%	59.7%
Metals											
World	58.20	56.83	153.45	76.31	64.03	52.97	89.50	57.51	87.25	51.7%	9.5%
Australia	0.00	0.00		0.00	0.00	0.00		0.00	0.00	-5.8%	-100.0%
Brazil	0.00	0.00					0.00	0.00	0.00	-100.0%	-100.0%
China	3.35	1.63		2.46	2.66	4.39	8.86	2.49	3.67	47.6%	40.4%
India	0.00	0.05		0.00	0.01	0.15	0.00	0.02	0.03	37.6%	-59.5%
Turkey		0.00		0.02	0.14	0.12	0.15	0.00	0.08	4187.2%	106.7%
UK	0.00	0.00		0.00	0.02	0.01	0.00	0.00	0.01	66.6%	2.4%
USA	0.01	0.00		0.05	0.03	0.02	0.01	0.00	0.02	445.4%	39.9%
EU27	0.03	0.05		0.14	0.21	0.07	0.11	0.04	0.11	165.9%	16.0%
Machinery											
World	96.30	102.77	114.75	144.26	155.00	142.48	118.73	99.53	135.04	35.7%	2.9%
Australia	0.04	0.02		0.00	0.05	0.10	0.09	0.03	0.05	72.3%	39.3%
Brazil		0.00					0.00	0.00	0.00	-23.8%	13.8%
China	3.09	2.82		4.28	8.05	5.10	5.37	2.96	4.56	54.0%	13.7%
India	0.33	0.08		0.26	4.86	0.69	0.20	0.21	1.20	484.5%	19.0%
UK	0.10	0.21		0.34	0.24	0.13	0.52	0.15	0.25	59.7%	19.7%
USA	0.71	0.90		4.14	1.55	0.82	2.17	0.81	1.74	115.3%	19.2%
EU27	3.52	3.36	0.00	3.63	14.13	5.58	4.61	3.44	5.59	62.4%	6.5%
Electronics											
World	78.21	88.19	102.06	113.16	104.22	77.77	106.89	83.20	100.82	21.2%	3.9%
Australia	0.00	0.00		0.00	0.00	0.00	0.00	0.00	0.00	38620.0%	324.1%
China	11.25	14.53		18.68	27.41	11.55	14.24	12.89	14.37	11.5%	-0.4%
India	0.00	0.00		0.09	0.04	0.00	0.00	0.00	0.02	1486.2%	49.0%
UK	0.04	0.09		0.19	0.17	0.33	0.46	0.06	0.23	262.5%	38.0%
USA	0.17	0.16		1.32	0.12	0.41	0.30	0.16	0.43	162.6%	14.3%
EU27	0.32	0.68		0.55	0.92	1.29	1.20	0.50	0.79	58.7%	12.0%
Vehicles											
World	100.38	89.21	96.99	125.96	109.25	68.17	89.51	94.79	97.97	3.4%	0.1%
Australia	0.01	0.01		0.01	0.02			0.01	0.01	-43.4%	-100.0%
China	0.21	0.82		0.45	1.18	0.50	0.47	0.52	0.52	0.5%	-10.5%
India	0.05	0.05		0.00	0.11	0.07	0.00	0.05	0.04	-25.5%	-83.9%
UK	0.12	0.24	0.00	0.65	0.28	0.30	0.13	0.18	0.27	52.4%	-12.1%
USA	0.16	0.19		0.29	0.21	0.08	0.21	0.18	0.16	-11.4%	1.4%
EU27	1.82	2.41	0.12	8.77	5.69	3.95	3.98	2.12	4.50	112.8%	10.5%
Other											
World	36.33	32.97	39.53	38.61	45.31	25.48	34.82	34.65	36.75	6.0%	1.1%
Australia	0.01	0.01		0.01	0.01	0.00	0.01	0.01	0.01	-29.5%	8.2%
Brazil	0.00	0.00		0.00	0.00	0.00	0.05	0.00	0.01	5303.0%	206.4%
China	1.55	1.11		1.47	1.17	0.69	1.79	1.33	1.02	-22.9%	10.1%
India	0.01	0.01		0.00	0.01	0.00	0.02	0.01	0.01	14.2%	26.1%
UK	1.23	2.10		0.85	0.88	0.49	0.38	1.66	0.52	-68.8%	-29.1%
USA	0.14	0.57		0.34	0.10	0.22	0.28	0.35	0.19	-45.8%	-12.8%
EU27	1.33	2.23		0.91	0.93	0.65	2.16	1.78	0.93	-47.8%	-0.6%

Source: Own calculations based on UN COMTRADE

Table 37: Mozambique’s exports to selected destination countries, by broad sector, 2017-2022 (USD millions)

Ex-post evaluation of the EU-SADC Economic Partnership Agreement

	2017	2018	2019	2020	2021	2022	Av 2017-18	Av 2019-22	Change pre/post	CAGR 2018-22
Agriculture										
World	571.7	661.4	860.3	622.7	834.4	953.7	616.5	817.7	32.6%	9.6%
Australia	0.4	0.4	0.9	0.3	0.2	0.2	0.4	0.4	3.2%	-15.4%
Brazil	0.8	1.3	1.8	1.7	1.1	2.8	1.0	1.9	77.5%	21.2%
China	79.0	50.7	136.2	85.6	120.5	105.5	64.8	111.9	72.7%	20.1%
India	38.8	13.7	84.0	87.9	182.5	258.6	26.2	153.3	484.3%	108.4%
Russia	6.2	4.3	4.8	4.1	4.4	0.1	5.2	3.4	-35.7%	-58.5%
Turkey	17.0	33.0	17.3	5.0	3.0	2.3	25.0	6.9	-72.4%	-48.3%
UK	11.1	24.6	7.2	2.3	12.4	14.5	17.9	9.1	-49.1%	-12.3%
USA	12.1	29.9	19.7	32.9	11.7	25.9	21.0	22.5	7.4%	-3.5%
EU27	179.7	275.6	303.1	187.2	198.5	206.6	227.7	223.9	-1.7%	-6.9%
Minerals										
World	2,653.8	2,715.1	2,357.4	1,543.6	2,724.0	4,905.5	2,684.4	2,882.6	7.4%	15.9%
Australia	9.5	0.0	0.0	10.9	0.0	0.0	4.7	2.7	-42.4%	-100.0%
China	171.5	247.5	179.3	163.1	354.1	269.8	209.5	241.6	15.3%	2.2%
India	1,563.6	1,387.4	697.3	307.5	594.7	1,449.2	1,475.5	762.2	-48.3%	1.1%
UK	0.7	0.0	1.7	1.1	0.8	41.4	0.3	11.2	3143.4%	458.1%
USA	10.4	39.3	53.5	25.6	80.7	95.8	24.9	63.9	156.9%	24.9%
EU27	75.3	130.3	266.3	147.2	330.6	668.0	102.8	353.0	243.4%	50.5%
Chemicals										
World	11.5	48.5	49.7	42.9	80.6	113.7	30.0	71.7	138.9%	23.7%
Australia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-62.6%	-40.7%
Brazil	0.0	4.4	0.0	0.0	0.0	0.0	2.2	0.0	-99.7%	-83.9%
China	0.1	0.1	0.0	0.0	0.1	0.1	0.1	0.0	-15.9%	9.0%
India	0.1	22.2	4.1	0.1	0.6	0.2	11.1	1.2	-88.9%	-69.5%
Turkey	0.0	0.1	0.0	0.1	0.1	0.0	0.1	0.0	-49.5%	-28.7%
UK	0.0	3.3	0.0	0.0	0.0	0.2	1.6	0.0	-97.0%	-52.0%
USA	0.1	0.3	0.2	0.1	0.0	0.0	0.2	0.1	-56.8%	-56.7%
EU27	0.6	3.8	0.3	0.8	1.6	2.1	2.2	1.2	-45.2%	-13.6%
Textiles										
World	22.2	37.2	84.0	71.3	82.8	102.1	29.7	85.1	186.4%	28.7%
Australia	0.1	0.1	0.0	0.0	0.0	0.0	0.1	0.0	-86.4%	-56.3%
Brazil	0.0	0.1	0.1	0.1	0.1	0.1	0.0	0.1	104.3%	5.0%
China	1.4	1.1	4.0	0.9	0.2	0.1	1.3	1.3	1.8%	-53.9%
India	0.0	0.1	3.5	0.1	0.1	1.8	0.0	1.4	2782.4%	128.8%
Turkey	0.0	0.1	0.6	0.6	0.1	0.0	0.0	0.3	929.5%	-42.9%
UK	0.0	0.0	0.1	2.6	0.4	0.3	0.0	0.8	5898.9%	83.6%
USA	0.0	0.1	0.1	0.1	0.2	0.1	0.1	0.1	115.8%	-0.4%
EU27	1.9	1.4	4.0	5.9	3.5	4.0	1.7	4.4	160.8%	29.1%
Stone										
World	103.1	201.3	187.7	12.2	110.2	188.0	152.2	124.5	-18.2%	-1.7%
Brazil	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	231.6%	-35.1%
China	0.6	0.6	2.9	1.0	1.5	2.7	0.6	2.0	243.3%	46.8%
India	4.7	0.4	0.7	0.0	0.6	0.5	2.6	0.5	-81.0%	4.9%
UK	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	619.1%	29.8%
USA	1.6	4.1	1.5	0.6	7.2	0.8	2.9	2.5	-11.4%	-33.7%
EU27	0.2	0.1	0.4	0.1	2.2	4.0	0.2	1.7	1014.4%	136.8%
Metals										
World	1,219.3	1,365.8	1,094.5	1,103.2	1,192.1	1,928.0	1,292.6	1,329.4	2.9%	9.0%
Australia	0.1	0.0	0.0	0.0	0.6	0.0	0.0	0.2	265.7%	-19.4%
Brazil	0.0	0.1	0.0	0.0	0.0	0.2	0.0	0.0	15.1%	21.9%
China	0.0	0.2	1.1	4.0	12.3	49.8	0.1	16.8	18722.3%	309.4%
India	14.3	11.8	12.6	25.7	24.5	34.3	13.1	24.3	85.9%	30.6%
Turkey	11.6	7.5	0.0	0.1	0.1	0.1	9.6	0.1	-99.3%	-68.0%
UK	198.3	65.0	211.0	367.0	354.8	924.5	131.7	464.3	252.7%	94.2%
USA	5.1	10.9	3.3	0.1	0.4	0.0	8.0	1.0	-87.9%	-75.8%
EU27	1,016.3	1,221.2	880.1	899.3	957.4	1,258.5	1,118.7	998.8	-10.7%	0.8%
Machinery										
World	23.0	39.8	24.9	19.2	35.7	35.9	31.4	28.9	-8.0%	-2.6%
Australia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	87.2%	-40.3%
Brazil	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	118.1%	11.2%
China	0.0	0.9	0.0	0.0	0.1	0.1	0.5	0.0	-90.2%	-49.8%
India	0.1	0.2	1.5	0.0	0.0	0.0	0.1	0.4	242.7%	-59.7%
Turkey	0.1	0.1	0.0	0.0	0.0	0.0	0.1	0.0	-79.6%	-52.1%
UK	0.6	0.1	0.2	0.3	3.7	1.8	0.4	1.5	315.0%	92.0%
USA	0.0	3.1	1.5	0.7	2.1	1.5	1.6	1.5	-7.7%	-16.9%
EU27	3.2	4.3	1.9	5.0	5.7	3.2	3.8	4.0	5.3%	-7.2%
Electronics										
World	6.0	45.1	9.1	5.2	2.7	7.6	25.5	6.2	-75.9%	-35.9%
Australia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	63.5%	-100.0%
Brazil	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	68.7%	-16.1%
China	0.0	0.8	0.4	0.0	0.0	0.5	0.4	0.2	-53.4%	-13.5%
India	0.1	0.0	0.1	1.8	0.0	0.0	0.0	0.5	920.1%	-43.9%
Russia	1.1	0.0	0.0	0.0	0.0	0.0	0.5	0.0	-99.5%	-100.0%
UK	0.2	0.0	0.0	0.0	0.0	0.6	0.1	0.2	100.8%	152.6%
USA	0.0	0.6	0.1	0.1	0.0	0.1	0.3	0.1	-77.2%	-35.6%
EU27	0.3	9.0	0.4	0.4	0.4	1.9	4.7	0.8	-83.4%	-32.1%
Vehicles										
World	50.5	27.6	12.0	9.4	18.7	20.9	39.0	15.3	-60.9%	-6.7%
Australia	0.0	0.3	0.0	0.0	0.0	0.0	0.2	0.0	-99.9%	-100.0%
Brazil	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-92.9%	-26.6%
China	0.0	0.0	0.0	0.5	0.8	0.0	0.0	0.3	316074.6%	48.3%
India	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	29.8%	-47.4%
UK	0.0	0.1	0.0	0.2	0.0	2.2	0.1	0.6	765.7%	99.9%
USA	23.9	10.8	3.0	0.1	0.0	0.0	17.4	0.8	-95.5%	-80.7%
EU27	4.5	5.2	0.6	0.7	0.8	5.2	4.9	1.8	-62.7%	-0.2%
Other										
World	57.3	53.8	42.7	30.3	30.5	9.5	55.6	28.3	-49.2%	-35.2%
Australia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-88.8%	-100.0%
Brazil	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	544.4%	-19.2%
China	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-56.9%	85.6%
India	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.9%	-15.3%
Turkey	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-52.8%	-100.0%
UK	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2240.5%	-100.0%
USA	0.0	0.1	0.1	0.0	0.0	0.0	0.1	0.0	-58.6%	-42.4%
EU27	0.0	0.4	0.2	0.1	0.1	0.1	0.2	0.1	-54.4%	-31.7%

Source: Own calculations based on UN COMTRADE

Table 38: Mozambique’s imports from selected supplier countries, by broad sector, 2017-2022 (USD millions)

Ex-post evaluation of the EU-SADC Economic Partnership Agreement

	2017	2018	2019	2020	2021	2022	Av 2017-18	Av 2019-22	Change pre/post	CAGR 2018-22
Agriculture										
World	887.4	1,133.7	1,300.4	1,338.3	1,880.0	1,826.7	1,010.5	1,586.3	57.0%	12.7%
Australia	0.1	0.1	0.1	0.0	83.8	75.9	0.1	40.0	41142.7%	415.8%
Brazil	13.0	12.7	10.1	8.8	13.5	39.8	12.9	18.1	40.4%	33.1%
China	19.4	36.1	29.7	32.2	42.9	45.1	27.8	37.5	35.0%	5.7%
India	6.0	8.3	13.3	33.1	129.6	152.2	7.1	82.1	1049.4%	106.8%
Russia	30.7	64.3	55.2	46.7	30.2	39.5	47.5	42.9	-9.7%	-11.5%
Turkey	1.2	2.1	2.6	3.5	10.2	11.3	1.7	6.9	316.1%	53.0%
UK	1.1	1.4	6.8	5.4	4.8	7.7	1.3	6.2	383.9%	52.2%
USA	14.6	11.7	38.9	10.7	32.1	18.0	13.2	24.9	89.6%	11.3%
EU27	97.0	138.1	141.1	153.3	151.1	179.7	117.6	156.3	33.0%	6.8%
Minerals										
World	1,329.5	1,555.2	1,687.1	1,103.4	1,578.9	2,888.1	1,442.4	1,814.4	25.8%	16.7%
Australia	6.2	0.9	5.2			4.5	3.6	2.4	-31.7%	50.5%
China	7.6	186.9	63.3	1.2	2.8	7.3	97.2	18.7	-80.8%	-55.6%
India	237.2	209.7	174.6	212.4	191.3	195.3	223.5	193.4	-13.4%	-1.8%
UK	1.5	17.1	14.9	54.8	1.5	0.3	9.3	17.8	91.5%	-64.9%
USA	1.9	12.4	1.5	5.7	13.5	82.9	7.2	25.9	261.0%	60.6%
EU27	27.7	122.5	75.6	70.7	32.2	11.4	75.1	47.5	-36.8%	-44.7%
Chemicals										
World	701.3	949.6	1,212.0	1,194.6	1,482.3	1,757.8	825.4	1,411.7	71.0%	16.6%
Australia	0.3	0.1	19.8	0.4	0.5	143.2	0.2	41.0	19182.0%	502.7%
Brazil	2.8	4.3	3.2	2.9	1.6	2.5	3.6	2.6	-28.6%	-12.7%
China	78.3	82.8	89.0	82.2	134.6	142.8	80.5	112.1	39.2%	14.6%
India	111.2	136.9	127.2	229.2	193.0	200.6	124.1	187.5	51.1%	10.0%
Russia	7.2	10.0	16.5	12.5	22.0	30.0	8.6	20.2	134.8%	31.5%
Turkey	6.0	1.8	6.8	9.1	11.9	13.6	3.9	10.3	167.4%	66.2%
UK	5.1	3.4	7.7	6.9	14.5	6.3	4.3	8.8	106.4%	16.1%
USA	23.0	20.0	17.2	19.6	28.4	34.6	21.5	25.0	16.0%	14.7%
EU27	142.6	124.9	151.1	167.4	170.8	171.9	133.8	165.3	23.6%	8.3%
Textiles										
World	266.6	288.0	327.0	300.6	364.9	362.6	277.3	338.8	22.2%	5.9%
Australia	1.2	1.7	0.2	0.5	0.0	0.3	1.4	0.3	-81.5%	-34.1%
Brazil	1.7	2.1	4.3	2.7	4.3	4.3	1.9	3.9	107.6%	20.2%
China	70.9	84.9	88.6	91.8	97.4	105.6	77.9	95.8	23.0%	5.6%
India	28.8	22.9	16.0	18.4	14.0	20.9	25.9	17.3	-33.0%	-2.3%
Turkey	0.9	1.5	3.6	9.4	12.9	1.7	1.2	6.9	464.4%	2.7%
UK	0.9	0.8	1.1	2.1	3.9	2.7	0.8	2.4	199.5%	36.7%
USA	4.4	4.7	7.1	4.5	22.2	3.1	4.5	9.2	104.2%	-9.5%
EU27	27.1	28.5	35.4	30.9	45.6	50.7	27.8	40.6	46.2%	15.5%
Stone										
World	87.4	91.0	136.9	114.1	149.0	154.3	89.2	138.6	55.4%	14.1%
Brazil	1.6	1.4	1.8	1.4	1.5	1.6	1.5	1.6	4.1%	3.7%
China	18.8	22.7	25.6	28.8	38.1	29.5	20.8	30.5	46.7%	6.8%
India	10.3	10.2	12.9	13.0	15.9	15.8	10.3	14.4	40.8%	11.7%
Turkey	1.1	0.8	6.5	1.1	1.7	1.6	1.0	2.7	186.1%	18.5%
UK	0.1	1.0	0.1	0.3	0.1	0.0	0.5	0.1	-77.8%	-55.8%
USA	0.9	3.1	4.2	1.6	0.6	0.9	2.0	1.9	-8.6%	-27.1%
EU27	18.0	15.8	35.4	17.3	18.5	25.3	16.9	24.1	42.8%	12.5%
Metals										
World	820.2	847.6	577.7	481.1	829.0	619.4	833.9	626.8	-24.8%	-7.5%
Australia	1.7	1.4	1.5	1.8	4.8	2.4	1.6	2.6	67.1%	14.7%
Brazil	5.7	0.5	0.7	0.8	0.5	0.7	3.1	0.7	-78.5%	10.1%
China	78.2	80.2	148.1	105.7	153.6	169.0	79.2	144.1	81.9%	20.5%
India	10.8	14.5	16.3	40.2	47.9	59.7	12.6	41.0	224.5%	42.6%
Turkey	3.9	8.1	11.0	8.6	18.6	13.8	6.0	13.0	115.6%	14.1%
UK	1.0	0.6	3.7	8.9	48.9	2.3	0.8	16.0	1839.8%	38.3%
USA	7.0	16.9	18.3	16.3	39.5	3.4	11.9	19.4	62.6%	-32.8%
EU27	503.7	516.0	120.3	74.3	246.5	81.5	509.9	130.6	-74.4%	-37.0%
Machinery										
World	590.2	865.3	1,132.6	909.6	952.4	955.9	727.7	987.6	35.7%	2.5%
Australia	3.5	1.8	3.4	4.1	5.0	3.6	2.6	4.0	51.5%	18.4%
Brazil	2.8	3.2	11.4	3.3	3.2	6.9	3.0	6.2	106.1%	20.8%
China	85.6	137.1	187.6	171.9	196.2	199.8	111.3	188.8	69.6%	9.9%
India	18.8	39.1	26.1	26.4	27.2	38.6	28.9	29.6	2.2%	-0.3%
Russia	0.0	0.1	0.1	0.0	0.1	0.0	0.0	0.0	-18.8%	-11.9%
Turkey	4.4	3.5	9.2	7.9	7.9	8.3	4.0	8.3	109.6%	23.8%
UK	16.2	13.9	45.3	81.8	32.4	19.1	15.1	44.7	196.5%	8.3%
USA	32.1	75.8	90.2	64.2	80.9	49.5	54.0	71.2	31.9%	-10.1%
EU27	139.0	154.9	258.6	210.5	194.2	217.8	146.9	220.3	49.9%	8.9%
Electronics										
World	340.3	373.7	458.7	369.7	521.8	538.1	357.0	472.1	32.2%	9.5%
Australia	0.6	0.4	1.2	1.7	0.1	0.4	0.5	0.9	68.5%	-0.5%
Brazil	1.4	0.7	0.8	6.2	3.4	1.3	1.1	2.9	173.2%	16.9%
China	86.6	97.5	122.6	89.7	141.1	163.5	92.1	129.2	40.3%	13.8%
India	6.0	9.5	8.4	12.6	31.1	24.1	7.7	19.0	145.8%	26.2%
Russia	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	271.0%	-4.8%
Turkey	1.6	2.6	2.7	7.0	10.9	4.1	2.1	6.2	195.5%	12.3%
UK	2.8	3.5	5.4	5.4	12.9	4.2	3.1	7.0	122.0%	4.4%
USA	7.4	17.1	16.0	13.5	10.6	10.7	12.2	12.7	3.5%	-11.2%
EU27	61.1	73.5	99.8	76.2	106.7	101.8	67.3	96.1	42.9%	8.5%
Vehicles										
World	586.4	575.4	671.7	540.8	749.1	5,435.0	580.9	1,849.1	218.3%	75.3%
Australia	0.4	0.3	0.6	0.6	0.2	0.9	0.3	0.6	69.3%	35.5%
Brazil	3.3	9.4	3.9	0.7	3.6	1.5	6.3	2.4	-61.3%	-36.7%
China	42.6	66.0	94.7	83.4	132.1	187.0	54.3	124.3	129.0%	29.8%
India	15.0	32.7	58.4	28.2	80.5	118.2	23.8	71.3	199.3%	37.9%
Turkey	0.9	0.6	2.2	1.0	0.8	1.7	0.8	1.4	86.8%	28.1%
UK	6.5	9.0	9.5	8.4	27.2	8.0	7.7	13.3	71.2%	-2.9%
USA	18.9	55.1	14.4	17.5	11.9	14.9	37.0	14.7	-60.3%	-27.9%
EU27	237.0	32.5	59.3	42.8	80.4	41.1	134.7	55.9	-58.5%	6.1%
Other										
World	92.5	106.0	134.6	85.5	115.4	127.4	99.3	115.7	16.6%	4.7%
Australia	0.1	0.0	0.1	0.1	0.0	0.0	0.1	0.1	-6.6%	32.1%
Brazil	0.9	0.8	0.7	0.8	0.8	0.5	0.9	0.7	-19.9%	-12.3%
China	5.3	5.2	12.3	7.8	7.7	10.4	5.2	9.6	82.3%	19.0%
India	6.8	6.5	10.9	6.3	9.3	16.4	6.6	10.7	61.4%	25.9%
Turkey	0.6	1.0	1.0	0.8	1.3	1.5	0.8	1.2	52.2%	12.4%
UK	1.8	1.9	1.9	2.6	1.1	1.7	1.9	1.8	-1.2%	-3.4%
USA	1.6	1.2	1.4	0.5	1.1	0.6	1.4	0.9	-37.8%	-16.7%
EU27	30.1	28.3	33.6	20.1	25.6	20.8	29.2	25.0	-14.2%	-7.3%

Source: Own calculations based on UN COMTRADE

Table 39: Namibia's exports to selected destination countries, by broad sector, 2012-2021 (USD millions)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Av 2012-16	Av 2017-22	Change pre/post	CAGR 2016-22
Agriculture															
World	1,439.4	1,435.2	1,242.1	1,102.9	959.9	1,160.5	1,273.4	1,135.8	901.2	1,147.6	1,237.4	1,235.9	1,142.7	-7.5%	4.3%
Australia	7.9	7.5	6.5	7.4	6.0	6.0	4.6	4.0	4.7	0.0	5.2	7.1	4.1	-42.2%	-2.4%
Brazil	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	0.0	0.1	0.2	110.0%	-100.0%
China	6.3	8.5	11.2	5.7	13.8	6.7	6.5	16.3	11.5	0.1	17.5	9.1	9.8	7.5%	4.1%
India	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.0	0.1	449.8%	102.2%
Russia	1.4	1.6	0.5	0.6	0.2	0.4	0.2	1.3	0.9	0.0	1.7	0.9	0.7	-13.0%	44.4%
Turkey	5.1	0.9	0.5	0.5	0.4	0.2	0.1	0.3	0.2	0.0	1.7	1.5	0.4	-71.0%	30.5%
UK	43.8	56.2	46.4	46.8	45.5	40.8	44.5	46.0	34.6	0.0	35.0	47.7	33.5	-29.8%	-4.3%
USA	4.4	7.9	3.7	1.1	0.8	0.6	0.6	0.5	3.3	0.1	2.6	3.5	1.3	-64.2%	22.6%
EU27	485.4	472.1	449.8	377.2	429.9	481.9	510.1	478.5	443.4	0.6	538.5	442.9	408.8	-7.7%	3.8%
Minerals															
World	1,025.7	1,133.8	913.9	559.1	393.5	484.3	896.3	910.9	782.0	919.1	1,165.6	805.2	859.7	6.8%	19.8%
Australia	0.0	0.2	0.0	0.0	0.1	0.0	17.6	0.0	0.0	0.0	0.0	0.1	3.0	4662.9%	-24.5%
Brazil	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.2	8.0	0.1	0.1	0.0	1.4	32592.4%	38.5%
China	133.0	132.0	95.5	121.7	92.9	152.7	465.3	554.0	581.8	0.0	617.7	115.0	395.2	243.5%	37.1%
India	1.3	1.2	0.2	0.0	0.1	0.1	0.1	0.4	0.6	0.0	2.9	0.6	0.7	20.6%	68.8%
Russia	0.1	0.0	0.2	0.1	0.1	0.4	0.4	0.0	0.0	0.0	0.4	0.1	0.2	166.5%	27.6%
Turkey	0.1	2.3	2.1	0.4	0.2	0.2	0.4	0.0	0.0	0.0	1.0	0.1	0.1	-90.4%	-67.9%
UK	0.0	1.6	2.6	1.6	0.4	0.1	0.6	1.1	1.1	0.0	0.4	1.2	0.6	-55.6%	1.9%
USA	94.3	120.3	141.7	39.1	50.0	41.7	0.9	19.4	0.0	0.0	59.9	89.1	20.3	-77.2%	3.1%
EU27	303.5	234.8	113.9	150.7	133.6	180.8	295.0	154.9	42.7	0.0	201.9	187.3	145.9	-22.1%	7.1%
Chemicals															
World	170.9	67.8	71.6	45.8	12.8	10.9	13.2	14.8	8.8	18.4	18.7	73.8	14.1	-80.9%	6.5%
Australia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	29.9%	3.1%
Brazil	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-77.5%	-100.0%
China	0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.0	0.0	0.2	0.0	0.1	0.1	-43.9%	-20.9%
India	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	4388.6%	-13.2%
Russia	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	-75.2%	-100.0%
Turkey	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-46.2%	..
UK	0.0	0.3	0.4	0.0	0.1	0.0	0.1	0.0	0.0	0.0	0.0	0.2	0.0	-73.4%	-5.2%
USA	0.0	0.0	0.1	0.1	0.1	0.2	0.4	1.1	0.2	0.0	0.3	0.1	0.4	526.6%	34.0%
EU27	3.1	4.3	4.7	2.6	1.9	1.8	1.9	1.6	1.3	0.1	1.0	3.3	1.3	-61.7%	-11.0%
Textiles															
World	75.9	73.1	68.8	15.0	3.2	7.0	2.9	3.0	3.0	3.0	3.2	47.2	3.7	-92.2%	0.1%
Australia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.1%	7.8%
Brazil	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-94.5%	-32.0%
China	0.0	0.9	0.3	0.0	0.0	3.7	0.0	0.0	0.0	0.0	0.0	0.2	0.6	159.2%	-10.4%
India	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	52.4%	-7.8%
Russia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-61.6%	-100.0%
Turkey	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5863.1%	70.9%
UK	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-16.5%	12.7%
USA	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-29.0%	-3.3%
EU27	0.6	0.2	0.4	0.2	0.1	0.5	0.2	0.1	0.1	0.0	0.1	0.3	0.2	-40.7%	-1.5%
Stone															
World	1,482.6	1,440.1	1,537.6	1,384.0	1,276.5	1,550.7	1,529.1	1,283.8	1,126.3	1,342.6	1,747.0	1,424.2	1,429.9	0.4%	5.4%
Australia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-87.5%	16.9%
Brazil	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	720.7%	..
China	1.3	0.1	0.1	0.1	0.0	3.2	4.9	3.7	2.2	0.1	3.7	0.3	3.0	855.7%	106.9%
India	4.3	4.8	10.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	31.8	3.8	5.3	39.0%	370.0%
Russia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	280.3%	-100.0%
Turkey	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	222.5%	-10.1%
UK	577.6	51.4	0.5	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	126.0	0.0	-100.0%	13.9%
USA	97.4	77.4	68.9	3.3	0.1	3.0	1.3	12.8	11.8	0.0	10.6	49.4	6.6	-86.7%	123.4%
EU27	680.2	134.3	73.0	5.2	6.0	11.0	21.9	29.0	10.9	0.0	51.9	179.7	20.8	-88.4%	43.3%
Metals															
World	524.9	542.4	696.7	577.4	276.6	216.9	277.0	284.7	140.4	53.2	56.8	523.6	171.5	-67.2%	-23.2%
Australia	0.1	0.0	0.0	0.0	0.1	0.1	0.1	0.0	0.1	0.0	0.0	0.0	0.1	36.4%	-66.2%
Brazil	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	606.7%	12.2%
China	1.2	0.3	45.9	5.9	9.4	19.5	22.3	38.9	35.6	0.0	13.8	12.5	21.7	73.1%	6.6%
India	5.4	6.5	0.3	0.3	1.2	1.4	0.0	1.6	0.2	0.1	1.1	2.8	0.7	-73.3%	-2.2%
Russia	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-96.0%	-100.0%
Turkey	0.0	0.0	0.0	0.0	0.0	0.3	2.5	0.0	0.0	0.0	0.0	0.0	0.5	233086566.7%	260.2%
UK	2.4	4.0	2.7	0.0	0.0	0.1	0.9	0.0	0.0	0.0	0.0	1.8	0.2	-90.3%	-6.7%
USA	1.1	5.6	0.5	0.0	4.9	0.1	0.0	0.0	0.0	0.3	0.3	2.4	0.1	-94.7%	-35.8%
EU27	360.4	121.3	76.5	123.0	175.4	130.7	149.3	92.4	31.7	0.1	0.3	171.3	67.4	-60.7%	-67.7%
Machinery															
World	74.5	194.9	195.0	31.6	10.5	9.6	24.7	18.9	13.1	13.8	0.2	101.3	13.4	-86.8%	-47.4%
Australia	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-73.7%	-49.3%
Brazil	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-100.0%	-100.0%
China	0.4	0.3	1.6	0.0	0.6	0.0	0.3	0.6	0.6	0.1	0.0	0.6	0.3	-55.5%	-100.0%
India	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-95.8%	-100.0%
Russia	0.1	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	-99.4%	..
Turkey	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-12.1%	61.8%
UK	0.1	9.4	3.6	0.0	0.1	0.0	0.0	0.0	0.0	0.6	0.0	2.7	0.1	-95.9%	-64.7%
USA	0.1	1.8	0.9	0.0	0.0	0.0	0.1	0.3	0.1	2.4	0.0	0.6	0.5	-14.8%	-65.0%
EU27	4.1	18.3	11.6	0.4	0.8	0.1	0.6	0.3	0.5	1.5	0.0	7.0	0.3	-92.7%	-47.4%
Electronics															
World	37.7	44.9	106.4	58.4	16.8	4.3	8.7	7.5	1.8	3.6	0.0	52.9	4.3	-91.8%	-100.0%
Australia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	169.7%	..
Brazil	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	55.4%	..
China	0.3	0													

Table 40: Namibia’s imports from selected supplier countries, by broad sector, 2012-2021 (USD millions)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Av 2012-16	Av 2017-22	Change pre/post	CAGR 2016-22
Agriculture															
World	1,030.8	1,090.1	1,081.5	1,046.0	943.4	1,010.4	1,014.5	1,055.7	919.8	1,236.1	1,201.4	1,038.4	1,073.0	3.3%	4.1%
Australia	0.1	3.9	3.0	0.5	0.2	0.1	0.0	0.5	0.4	2.4	1.0	1.5	0.8	-51.2%	33.7%
Brazil	4.0	2.9	3.9	2.8	1.8	12.6	11.6	11.5	11.7	25.0	52.3	3.1	20.8	575.1%	74.7%
China	7.4	12.7	13.6	14.4	10.2	18.8	12.4	13.8	15.8	17.8	22.9	11.7	16.9	44.8%	14.4%
India	6.3	4.2	7.1	15.8	12.0	11.0	11.8	10.5	10.4	11.2	8.1	9.1	10.5	15.5%	-6.4%
Russia	0.0	0.0	0.0	3.2	1.8	5.5	16.2	17.2	24.2	34.6	1.0	1.0	16.5	1508.8%	-9.5%
Turkey	0.1	0.0	0.3	0.4	0.3	0.3	0.3	0.8	1.0	1.8	3.7	0.2	1.3	500.3%	54.2%
UK	14.1	4.5	1.3	2.5	2.3	4.3	3.7	3.1	4.7	10.5	9.4	4.9	6.0	20.5%	26.5%
USA	0.5	6.7	2.8	13.8	10.3	12.4	8.7	8.1	21.9	29.2	23.0	6.8	17.2	152.4%	14.3%
EU27	61.4	54.8	65.1	53.8	52.1	63.0	70.5	70.2	55.9	105.1	140.2	57.5	84.1	46.3%	17.9%
Minerals															
World	1,255.0	1,264.2	811.4	1,494.8	1,081.6	1,284.4	1,252.4	1,493.2	1,195.8	1,649.3	2,128.0	1,181.4	1,500.5	27.0%	11.9%
Australia	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	35.4%	12.3%
Brazil	0.0	0.8				0.0	0.0		0.0	0.0	0.0	0.2	0.0	-94.4%	..
China	8.6	1.7	3.5	4.6	24.5	2.9	27.0	2.9	9.8	0.5	0.2	8.6	7.2	-15.9%	-55.1%
India		15.9	72.7	87.8	88.0	88.7	87.4	165.8	117.2	224.8	269.1	52.9	158.8	200.3%	20.5%
Russia	0.8	0.0	0.2	3.4	0.1	0.8		5.0	11.1		0.4	0.9	2.9	216.0%	38.6%
Turkey	0.1		0.3	40.2	85.5	66.1	31.2	49.8	58.5	26.0	5.2	25.2	39.5	56.6%	-37.3%
UK	0.6	18.8	0.1	0.0	0.0	0.3	0.6	2.1	0.1	11.6	1.4	3.9	2.7	-31.5%	152.3%
USA	5.7	24.8	20.5	0.0	50.5	26.1	24.5	10.3	47.5	20.1	48.3	20.3	29.5	45.0%	-0.7%
EU27	84.0	153.3	243.0	133.8	151.0	539.1	293.8	356.1	327.5	236.8	368.3	153.0	353.6	131.1%	16.0%
Chemicals															
World	835.1	823.8	846.4	805.7	775.7	889.8	958.2	919.7	866.3	1,167.8	1,244.3	817.3	1,007.7	23.3%	8.2%
Australia	6.1	2.9	3.8	3.9	5.6	4.5	4.8	4.8	6.7	3.9	5.0	4.4	4.9	11.2%	-1.8%
Brazil	0.0	0.2	0.1	0.0	0.2	2.2	1.8	0.9	1.7	1.0	1.0	0.1	1.4	1392.2%	33.7%
China	51.9	53.0	55.7	47.8	25.7	40.3	56.8	40.2	42.7	79.3	81.9	46.8	56.9	21.4%	21.3%
India	19.8	21.1	32.9	29.3	37.9	25.2	22.8	34.5	33.4	40.3	40.6	28.2	32.8	16.4%	1.1%
Russia	0.0	0.1	0.1	0.0	2.1	0.8	8.5	3.4	1.2	3.2	15.8	0.5	5.5	1084.8%	40.5%
Turkey	0.7	0.2	5.1	5.9	2.6	5.1	2.2	0.9	0.5	0.9	8.1	2.9	3.0	2.2%	21.0%
UK	2.7	2.1	1.9	2.8	4.5	17.2	8.0	8.1	16.6	30.8	45.2	21.0	21.0	655.8%	47.1%
USA	2.9	9.2	19.0	19.9	17.6	51.7	65.8	70.4	40.0	50.2	49.6	13.7	54.6	298.6%	18.9%
EU27	35.9	44.9	42.0	48.5	52.1	71.6	76.9	99.4	104.8	180.7	194.5	44.7	121.3	171.6%	24.6%
Textiles															
World	409.9	420.9	473.2	438.6	349.9	364.3	337.7	316.6	246.3	351.1	342.6	418.5	326.4	-22.0%	-0.4%
Australia	0.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.1	0.1	2.8%	43.7%
Brazil	1.0	1.6	4.1	5.1	0.5	0.1	0.2	0.4	0.6	0.3	0.6	2.5	0.4	-84.5%	4.9%
China	17.2	15.7	33.4	36.3	9.7	16.9	43.5	54.7	47.3	78.7	67.2	22.5	51.4	128.7%	38.0%
India	0.5	0.9	1.3	1.9	1.0	1.6	2.1	2.5	2.7	4.9	4.4	1.1	3.0	167.3%	27.5%
Russia	0.9	0.4	0.4	0.3	0.1	0.0	0.0	0.0	0.0	0.0	0.2	0.4	0.0	-92.0%	11.9%
Turkey	0.0	0.1	0.3	0.1	0.1	0.2	0.2	0.2	1.2	0.4	1.3	0.1	0.6	334.2%	51.1%
UK	0.3	0.4	0.2	0.7	0.6	0.3	0.3	0.5	0.2	2.4	0.4	0.4	0.7	53.3%	-6.3%
USA	0.4	0.5	0.5	0.5	0.4	0.6	0.6	0.9	2.3	2.1	4.6	0.5	1.9	285.0%	47.9%
EU27	4.3	4.6	6.6	10.2	5.3	4.4	5.8	8.0	7.3	13.9	9.1	6.2	8.1	30.5%	9.4%
Stone															
World	486.9	516.6	457.8	294.8	619.8	503.2	417.3	364.1	400.6	284.3	367.5	475.2	389.5	-18.0%	-8.3%
Australia	0.0	0.2	0.0	0.1	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.1	0.0	-66.9%	11.9%
Brazil	0.3	0.4	0.4	0.4	0.3	0.1	0.1	0.1	0.1	0.1	0.1	0.4	0.1	-73.1%	-10.0%
China	4.5	6.4	5.6	7.0	3.6	4.4	7.4	8.8	5.8	8.1	9.1	5.4	7.3	33.7%	16.5%
India	0.7	0.1	0.5	0.1	0.8	0.1	0.2	0.2	0.1	0.9	1.6	0.4	0.5	16.0%	12.3%
Russia	0.0			0.1	0.5	0.3	1.2	0.1	0.0	0.0	0.0	0.1	0.3	116.1%	-39.2%
Turkey	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.2	0.0	0.1	354.8%	158.5%
UK	103.0	0.5	0.5	0.5	0.9	0.0	0.1	0.1	0.1	0.1	0.1	21.1	0.1	-99.6%	-30.9%
USA	5.3	6.5	4.8	4.7	0.8	0.2	0.1	0.5	2.9	8.5	15.0	4.4	4.5	2.8%	64.2%
EU27	120.9	6.9	4.6	4.5	7.4	3.2	2.4	3.8	3.5	4.4	11.3	28.9	4.8	-83.5%	7.3%
Metals															
World	594.7	628.6	823.3	863.9	687.1	704.8	1,557.6	1,680.9	1,845.7	2,582.2	450.5	719.5	1,470.3	104.3%	-6.8%
Australia	0.2	1.0	1.0	0.1	0.1	0.1	0.1	0.2	0.2	0.3	1.4	0.5	0.4	-23.5%	0.3%
Brazil	0.1	0.0	0.1	0.1	0.1	0.0	0.9	0.1	0.0	0.1	0.2	0.1	0.2	160.5%	1.5%
China	17.2	17.9	45.9	117.7	37.0	72.3	80.2	74.8	69.7	85.5	106.0	47.1	81.4	72.7%	19.2%
India	1.8	3.8	9.4	2.4	4.6	5.8	3.0	1.4	0.6	12.3	8.1	4.4	5.2	17.4%	9.7%
Russia	0.0	2.1	4.9	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	1.4	0.0	-98.1%	3.6%
Turkey	2.0	0.2	0.9	0.2	0.3	0.4	0.6	0.2	0.2	3.1	4.6	0.7	1.5	107.9%	54.3%
UK	18.4	10.0	1.3	1.0	1.4	0.8	5.1	2.0	1.2	2.8	1.6	6.4	2.2	-65.3%	2.2%
USA	5.0	3.2	2.1	1.8	1.8	1.7	3.0	5.2	4.0	18.3	18.9	2.8	8.5	205.5%	47.5%
EU27	41.0	26.1	25.6	19.3	20.9	14.3	20.5	53.5	17.6	29.1	18.3	26.6	25.6	-3.9%	-2.1%
Machinery															
World	804.4	881.6	1,216.3	892.6	712.4	738.8	742.8	689.8	543.5	894.1	836.4	901.5	740.9	-17.8%	2.7%
Australia	3.5	3.5	8.0	8.2	3.5	4.3	2.3	2.5	2.5	5.6	10.4	5.3	4.6	-13.5%	19.8%
Brazil	2.3	1.6	0.7	1.2	1.0	2.3	1.2	1.0	0.9	2.5	1.8	1.4	1.6	18.0%	10.7%
China	36.5	47.6	64.0	90.9	34.6	60.4	106.2	68.3	59.1	114.4	131.6	54.7	90.0	64.5%	24.9%
India	2.3	2.6	12.6	3.7	2.7	5.5	4.4	4.3	3.5	10.0	12.4	4.8	6.7	39.8%	28.8%
Russia	1.1	0.8	0.6	1.7	2.1	1.0	0.4	0.1	0.4	0.4	0.3	1.2	0.4	-64.9%	-28.3%
Turkey	0.2	0.2	1.3	0.2	0.3	0.3	0.8	1.5	0.9	2.2	1.9	0.4	1.2	191.3%	39.6%
UK	16.3	68.9	67.5	14.7	10.6	9.0	8.8	5.1	8.9	23.4	11.7	35.6	11.2	-68.7%	1.6%
USA	18.8	28.7	79.5	22.8	32.3	27.1	46.7	51.8	35.0	64.0	71.9	36.4	49.4	35.7%	14.3%
EU27	95.6	152.1	308.7	121.7	77.6	91.1	73.3	78.5	83.9	171.9	161.5	151.1	110.0	-27.2%	13.0%
Electronics															
World	355.0	398.0	452.5	415.2	332.3	370.9	380.8	310.6	245.2	390.9	400.2	390.6	349.8	-10.5%	3.1%
Australia	0.6	0.7	2.5	0.9	1.0	0.5	0.5	0.6	0.4	0.8	2.1	1.1	0.8	-29.6%	12.3%
Brazil	0.0	0.1	0.5	0.2	0.0	0.8	0.2	0.1	0.1	0.9	0.9	0.2	0.5	200.0%	84.4%
China	20.3	47.0	27.1	22.6	33.2	48.4	83.7	41.3	39.3	106.2	120.6	30.0	73.2	143.8%	24.0%
India	0.8	0.4	1.1	0.3	0.4	1.1	5.9	1.3	0.9	1.4	4.8	0.6			

Table 41: South Africa’s exports to selected destination countries, by broad sector, 2012-2022 (USD millions)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Av 2012-16	Av 2017-22	Change pre/post	CAGR 2016-22
Agriculture															
World	10,470.8	11,197.6	11,515.7	10,515.1	10,399.8	11,648.3	12,232.2	11,162.8	11,730.7	13,648.6	15,000.3	10,819.8	12,570.5	16.2%	6.3%
Australia	107.3	119.4	105.7	87.1	91.2	94.0	109.2	83.3	87.4	89.2	84.8	102.2	91.3	-10.6%	-1.2%
Brazil	22.0	22.5	23.0	15.8	10.0	15.1	14.3	10.4	8.9	11.7	13.7	18.7	12.3	-33.8%	5.5%
China	299.9	401.2	550.7	550.4	520.0	546.3	724.4	586.7	763.9	738.6	883.0	464.4	707.1	52.3%	9.2%
India	72.7	104.6	100.5	179.6	246.2	322.5	294.4	279.1	303.2	512.5	747.8	140.7	409.9	191.3%	20.3%
Russia	168.9	196.9	171.9	164.1	144.4	201.9	213.9	182.4	246.5	255.0	250.3	169.2	225.0	32.9%	9.6%
Turkey	16.1	63.2	27.6	21.1	14.4	29.7	60.5	20.2	35.7	26.9	35.7	28.5	34.8	22.2%	16.3%
UK	642.6	690.6	712.9	716.9	700.5	797.9	894.0	787.1	867.2	976.7	898.1	692.7	870.2	25.6%	4.2%
USA	283.6	295.0	318.8	318.9	310.9	371.0	418.7	417.8	441.9	596.1	613.6	305.4	476.5	56.0%	12.0%
EU27	2,393.9	2,687.5	2,736.0	2,558.2	2,622.2	2,936.8	3,330.7	2,864.6	3,196.4	3,756.1	3,707.7	2,599.6	3,298.7	26.9%	5.9%
Minerals															
World	24,655.1	24,313.9	21,757.8	16,621.9	15,506.0	22,279.9	22,205.8	22,333.9	20,105.8	29,101.1	34,227.4	20,571.0	25,042.3	21.7%	14.1%
Australia	50.1	40.5	38.7	34.5	29.7	52.6	49.2	25.2	15.7	24.4	25.0	38.7	32.0	-17.3%	-2.8%
Brazil	182.5	96.3	119.0	123.6	78.5	124.0	87.6	100.6	46.8	78.6	148.1	120.0	97.6	-18.6%	11.2%
China	7,947.5	9,025.4	5,909.9	4,474.5	4,181.7	6,258.0	5,888.2	7,055.4	6,790.8	9,543.5	7,548.6	6,307.8	7,180.7	13.8%	10.3%
India	2,465.8	1,891.4	2,660.2	2,167.9	2,337.9	3,034.1	3,324.7	2,938.5	2,416.7	2,971.0	3,725.5	2,304.6	3,068.4	33.1%	8.1%
Russia	69.5	48.3	68.1	48.0	50.4	84.7	131.1	106.6	63.7	68.9	12.2	56.9	74.5	31.1%	-21.1%
Turkey	347.8	271.8	312.3	312.8	184.2	246.8	264.7	98.4	162.7	164.9	237.2	285.8	195.8	-31.5%	-4.3%
UK	314.6	306.6	239.8	99.1	41.9	93.2	108.5	137.3	93.6	367.0	813.1	200.4	268.8	34.1%	63.9%
USA	777.2	730.8	716.0	580.0	420.5	760.1	618.6	731.4	525.6	490.6	658.5	644.9	630.8	-2.2%	7.8%
EU27	3,469.5	3,469.3	3,207.5	1,907.5	1,719.0	2,265.8	2,275.2	2,226.8	2,639.2	5,184.3	8,930.7	2,754.6	3,920.3	42.3%	31.6%
Chemicals															
World	8,411.6	7,821.7	7,940.1	6,960.6	6,229.2	7,229.5	7,523.6	7,126.5	7,158.9	9,618.4	9,951.8	7,472.6	8,101.5	8.4%	8.1%
Australia	118.8	169.2	132.7	106.7	83.3	86.5	101.6	102.5	89.0	91.8	108.0	122.1	96.5	-20.9%	4.4%
Brazil	296.1	319.2	218.6	147.4	104.1	130.8	138.0	123.5	97.9	112.6	84.1	217.1	114.5	-47.3%	-3.5%
China	248.8	213.2	215.1	150.1	129.7	161.8	143.7	187.7	279.4	161.3	280.1	191.4	202.3	5.7%	13.7%
India	220.5	265.8	193.8	140.1	134.2	192.9	218.5	134.2	114.3	160.0	211.0	190.9	171.8	-10.0%	7.8%
Russia	4.6	5.8	4.7	14.5	5.5	5.7	8.2	9.1	12.4	9.9	2.2	7.0	7.9	-12.4%	-14.2%
Turkey	122.7	48.9	46.6	36.0	29.1	30.3	24.1	27.0	39.8	71.0	60.8	56.7	42.2	-25.6%	13.0%
UK	98.5	104.9	119.2	105.9	97.1	96.9	112.8	92.5	120.0	188.3	202.6	105.1	135.5	28.9%	13.0%
USA	805.3	679.8	743.1	632.1	536.7	607.1	718.3	707.3	669.7	1,333.4	866.6	679.4	817.1	20.3%	8.3%
EU27	1,017.8	875.1	1,211.6	1,052.8	995.8	1,365.8	1,606.0	1,585.3	1,680.2	2,469.3	2,277.6	1,030.6	1,830.7	77.6%	14.8%
Textiles															
World	2,136.6	2,085.8	2,016.9	1,834.5	1,674.8	1,912.1	1,965.5	1,763.9	1,499.7	1,922.2	1,838.9	1,949.7	1,817.1	-6.8%	1.6%
Australia	18.9	19.4	18.3	20.3	19.5	22.1	18.1	19.7	23.1	32.8	24.8	19.3	23.4	21.5%	4.1%
Brazil	4.5	7.2	5.9	4.3	3.7	4.4	3.5	3.3	2.6	3.6	4.2	5.1	3.6	-29.2%	2.4%
China	197.7	214.8	212.5	207.7	216.0	286.5	299.7	191.3	234.9	266.7	170.1	209.7	241.5	15.2%	-3.9%
India	35.8	25.7	16.4	14.9	12.3	11.8	12.4	20.8	5.1	33.1	11.0	21.1	15.7	-25.5%	-2.0%
Russia	0.9	0.2	0.2	0.2	0.2	0.7	0.7	0.3	0.4	0.5	0.2	0.3	0.4	-32.7%	-4.8%
Turkey	4.2	2.0	0.5	1.2	1.7	1.0	0.9	0.7	0.8	2.5	0.8	1.9	1.1	-42.8%	-12.1%
UK	37.1	43.9	52.3	44.4	32.1	38.5	47.1	31.2	30.6	47.6	35.6	41.9	38.4	-8.3%	1.7%
USA	42.4	38.3	38.7	46.9	40.5	36.3	38.0	47.3	37.4	49.8	42.1	41.4	41.8	1.0%	0.6%
EU27	415.7	383.1	326.3	257.6	246.4	270.5	299.2	268.3	179.0	240.2	244.7	325.8	250.3	-23.2%	-0.1%
Stone															
World	19,486.0	17,808.8	16,347.6	14,105.3	13,576.7	14,500.2	16,306.7	15,298.7	19,664.2	33,863.9	25,668.9	16,264.9	20,883.8	28.4%	11.2%
Australia	5.1	6.6	8.4	7.2	4.8	3.6	4.4	4.4	3.7	6.2	14.3	6.4	6.1	-5.4%	19.7%
Brazil	4.4	4.9	4.5	2.8	2.3	1.7	1.9	1.6	1.6	2.8	1.7	3.8	1.9	-50.7%	-5.5%
China	212.9	342.0	230.9	238.7	192.0	107.1	209.1	95.1	155.8	748.6	513.1	243.3	304.8	25.3%	17.8%
India	86.8	77.7	54.3	82.5	66.8	88.0	81.8	153.9	115.6	137.6	103.2	73.6	113.4	54.0%	7.5%
Russia	0.1	0.1	1.0	0.7	0.1	0.2	0.1	0.2	0.3	0.4	0.1	0.4	0.2	-51.3%	-1.4%
Turkey	4.6	1.4	2.9	2.7	3.2	1.9	1.2	0.7	5.7	0.2	1.6	3.0	1.9	-35.9%	-11.4%
UK	1,516.2	1,307.5	1,304.9	1,419.7	1,388.8	1,514.3	2,091.3	2,104.5	2,080.9	5,094.9	3,039.0	1,387.4	2,654.1	91.3%	13.9%
USA	1,580.4	1,585.2	1,298.7	1,594.6	1,292.3	1,706.3	1,980.3	2,209.2	3,467.3	7,304.4	5,011.3	1,470.3	3,613.1	145.7%	25.3%
EU27	2,728.0	2,513.6	2,706.2	2,829.4	2,854.4	2,960.7	3,573.4	3,204.8	3,860.4	7,894.9	5,218.5	2,726.3	4,452.1	63.3%	10.6%
Metals															
World	12,118.1	11,620.0	11,979.0	9,771.8	9,116.8	10,531.5	11,163.3	9,624.3	7,800.1	11,374.1	12,199.7	10,921.1	10,448.9	-4.3%	5.0%
Australia	89.8	57.3	58.6	69.6	73.2	125.3	77.3	64.3	59.8	77.9	77.4	69.7	80.4	15.3%	0.9%
Brazil	203.4	146.9	133.3	120.6	135.0	102.5	187.2	143.7	106.9	190.1	94.7	147.8	137.5	-7.0%	-5.7%
China	1,158.2	1,527.8	1,500.7	1,748.8	1,608.3	1,233.9	1,180.6	1,367.7	1,475.1	1,960.3	2,237.2	1,508.8	1,575.8	4.4%	5.7%
India	708.7	506.0	539.1	386.9	244.7	230.5	327.0	310.8	175.9	199.3	318.8	477.1	260.4	-45.4%	4.5%
Russia	16.6	29.7	38.3	26.1	63.0	40.6	32.5	16.3	13.6	15.1	4.9	34.7	20.5	-41.0%	-34.6%
Turkey	57.8	182.8	155.5	109.2	114.8	79.9	94.4	64.2	94.2	38.5	37.7	124.0	68.2	-45.0%	-16.9%
UK	130.7	158.1	167.7	108.4	103.7	111.8	100.1	164.3	143.5	206.7	252.3	133.7	163.1	22.0%	16.0%
USA	1,291.3	1,076.1	1,383.5	865.3	915.5	1,348.0	1,423.8	1,006.9	743.7	1,273.7	1,426.0	1,106.3	1,203.7	8.8%	7.7%
EU27	2,110.1	2,040.8	2,095.7	1,594.7	1,464.3	1,902.3	1,993.4	1,805.5	1,593.9	2,238.6	2,435.8	1,861.1	1,994.9	7.2%	8.9%
Machinery															
World	7,931.3	7,337.3	7,327.5	6,552.2	5,917.2	6,097.3	5,746.6	5,469.7	5,668.6	7,445.0	7,511.4	7,013.1	6,323.1	-9.8%	4.1%
Australia	138.2	94.9	82.8	77.2	67.3	103.8	104.9	116.3	104.9	113.2	119.9	92.1	110.5	20.0%	10.1%
Brazil	60.7	35.3	28.6	12.5	12.7	18.3	14.0	21.4	20.7	56.1	97.9	29.9	38.1	27.1%	40.6%
China	94.7	164.0	102.0	21.4	25.7	25.6	30.3	33.7	39.5	89.0	32.5	81.5	41.8	-48.8%	4.0%
India	78.0	98.0	147.0	149.6	173.1	180.5	140.8	124.6	75.5	108.2	51.9	129.1	113.6	-12.1%	-18.2%
Russia	21.5	28.3	8.3	14.3	13.5	16.8	10.0	50.2	55.3	49.0	11.4	17.2	32.1	87.0%	-2.8%
Turkey	40.3	45.8	41.4	45.0	43.5	58.7	46.4	61.3	72.6	153.2	157.2	43.2	91.6	111.9%	23.9%

Table 42: South Africa's imports from selected supplier countries, by broad sector, 2012-2022 (USD millions)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Av 2012-16	Av 2017-22	Change pre/post	CAGR 2016-22
Agriculture															
World	8,448.0	7,818.2	7,364.1	7,010.4	7,197.2	7,521.2	7,638.4	7,344.5	6,579.4	7,715.2	8,278.3	7,567.6	7,512.8	-0.7%	2.4%
Australia	199.1	165.6	146.1	138.6	76.2	88.6	72.2	56.9	49.5	208.8	265.8	145.1	123.6	-14.8%	23.2%
Brazil	567.0	528.3	350.7	391.3	377.2	534.2	487.4	382.6	355.5	417.2	541.0	442.9	453.0	2.3%	6.2%
China	830.5	741.8	546.3	520.6	479.0	531.5	551.0	531.4	420.0	501.4	586.3	623.6	520.3	-16.6%	3.4%
India	330.3	394.7	343.1	321.0	270.5	264.9	259.2	241.0	281.1	263.5	243.5	331.9	258.8	-22.0%	-1.7%
Russia	28.3	85.0	279.3	208.3	141.0	110.1	207.8	119.1	145.4	73.5	52.3	148.4	118.0	-20.5%	-15.2%
Turkey	21.1	18.6	20.9	27.9	22.0	23.7	24.7	25.3	28.1	39.4	37.7	22.1	29.8	34.9%	9.4%
UK	383.9	399.1	390.2	306.5	284.8	271.7	282.1	278.1	207.6	240.4	251.4	352.9	255.2	-27.7%	-2.1%
USA	295.4	316.9	294.4	235.2	313.2	374.4	363.8	394.5	285.0	344.5	320.6	291.0	347.1	19.3%	0.4%
EU27	2,001.1	1,973.8	2,136.9	1,917.0	1,861.1	1,986.2	2,112.1	2,198.2	2,084.8	2,255.0	2,379.0	1,978.0	2,169.2	9.7%	4.2%
Minerals															
World	23,457.8	22,894.8	23,677.3	13,785.7	10,439.9	12,518.4	17,571.5	15,142.3	9,833.7	15,761.4	25,814.9	18,851.1	16,107.0	-14.6%	16.3%
Australia	203.3	176.2	124.1	111.0	130.9	196.5	273.3	256.2	110.0	173.9	207.7	149.1	203.3	36.3%	8.0%
Brazil	118.7	105.8	99.0	78.8	37.2	86.3	87.2	52.5	107.6	40.7	52.7	87.9	71.2	-19.0%	6.0%
China	82.3	152.6	102.4	97.8	227.4	282.6	265.6	168.3	88.0	165.6	576.5	132.5	257.8	94.5%	16.8%
India	1,477.5	1,812.2	1,649.8	1,312.5	711.3	929.2	484.0	872.2	602.6	1,316.2	3,531.6	1,392.6	1,289.3	-7.4%	30.6%
Russia	10.5	113.2	14.5	3.4	3.8	25.0	59.6	57.8	64.5	88.4	58.9	29.1	59.0	103.0%	57.9%
Turkey	60.7	118.1	77.8	60.6	7.7	40.9	62.4	90.0	70.8	255.3	1,164.6	65.0	280.7	332.0%	130.8%
UK	202.9	179.4	371.7	310.8	203.1	187.9	104.7	28.3	42.6	121.2	100.4	253.6	97.5	-61.5%	-11.1%
USA	304.0	271.5	184.9	218.8	173.7	268.1	224.4	340.7	213.9	584.9	629.9	230.6	377.0	63.5%	24.0%
EU27	1,242.8	1,026.4	1,019.2	909.8	535.3	945.0	1,084.6	646.6	588.8	1,442.7	1,566.6	946.7	1,045.7	10.5%	19.6%
Chemicals															
World	13,693.6	13,641.1	13,313.9	12,405.8	11,113.7	12,700.6	14,236.6	13,124.9	11,960.8	16,013.7	17,318.6	12,833.6	14,225.9	10.8%	7.7%
Australia	496.2	612.0	508.1	483.2	321.4	482.6	734.1	535.0	449.1	534.7	591.0	484.2	554.4	14.5%	10.7%
Brazil	104.0	105.1	108.1	118.1	165.8	174.1	111.9	104.2	105.6	140.1	199.6	120.2	139.3	15.8%	3.1%
China	1,571.9	1,645.0	1,782.4	1,654.7	1,528.5	1,752.3	2,131.8	1,922.8	1,796.9	2,527.7	3,068.4	1,636.5	2,200.0	34.4%	12.3%
India	709.2	883.5	738.7	854.9	730.8	900.0	1,056.6	960.6	1,083.9	1,216.2	1,220.2	783.4	1,077.9	37.6%	8.9%
Russia	94.0	93.4	57.6	91.8	51.1	104.6	88.7	91.3	74.3	206.2	298.5	77.6	143.9	85.6%	34.2%
Turkey	69.8	67.1	71.3	68.7	76.1	97.8	118.8	116.1	102.7	129.9	141.7	70.6	117.8	66.9%	10.9%
UK	555.7	521.6	526.8	461.0	380.6	406.0	433.9	396.8	308.6	334.8	360.2	489.1	373.4	-23.7%	-0.9%
USA	1,359.1	1,326.5	1,223.0	1,291.2	1,086.4	1,157.0	1,240.5	1,223.2	1,260.4	1,531.9	1,523.5	1,257.2	1,322.8	5.2%	5.8%
EU27	5,163.0	5,175.0	5,160.4	4,634.3	4,240.9	4,824.2	5,254.7	5,048.6	4,395.8	5,773.5	5,845.9	4,874.7	5,190.4	6.5%	5.5%
Textiles															
World	5,157.4	5,214.3	5,049.7	4,997.1	4,606.1	4,772.3	5,177.3	5,017.5	4,417.0	5,155.2	5,502.3	5,004.9	5,006.9	0.0%	3.0%
Australia	8.6	7.8	8.3	6.8	6.0	5.4	7.0	7.3	6.0	6.9	8.4	7.5	6.8	-9.0%	5.8%
Brazil	29.5	22.9	18.8	19.4	18.2	18.1	15.2	16.1	12.8	17.6	20.7	21.8	16.8	-23.0%	2.2%
China	2,776.5	2,791.6	2,641.1	2,582.7	2,283.8	2,372.1	2,613.9	2,499.2	2,468.1	2,591.3	2,709.4	2,615.1	2,543.9	-2.8%	2.9%
India	208.3	212.1	203.2	221.3	196.8	214.3	234.8	255.7	176.4	223.2	247.4	208.3	225.3	8.1%	3.9%
Russia	0.2	0.9	0.5	0.6	0.9	0.1	0.5	0.4	0.2	0.5	0.2	0.6	0.3	-49.5%	-23.8%
Turkey	62.1	55.8	61.9	61.8	55.8	63.1	74.0	73.5	56.0	76.0	80.5	59.5	70.5	18.5%	6.3%
UK	49.0	52.9	48.7	41.7	37.8	36.1	34.4	36.1	22.3	27.4	28.1	46.0	30.7	-33.2%	-4.8%
USA	68.2	62.8	65.8	59.0	58.2	61.2	73.8	68.1	49.4	63.6	59.8	62.8	62.6	-0.3%	0.5%
EU27	511.2	524.1	526.3	487.3	471.2	466.2	507.0	490.3	345.6	481.7	484.3	504.0	462.5	-8.2%	0.5%
Stone															
World	2,021.7	1,899.6	1,998.2	1,592.2	1,600.6	1,934.6	2,229.4	2,133.0	1,840.8	2,438.6	2,419.3	1,822.5	2,166.0	18.8%	7.1%
Australia	3.8	2.5	1.8	1.7	1.3	1.8	1.6	1.3	1.1	1.8	1.0	2.2	1.4	-35.7%	-4.3%
Brazil	14.6	11.8	13.7	10.4	12.1	10.9	11.7	9.5	6.1	7.9	8.1	12.5	9.1	-27.6%	-6.4%
China	406.3	408.0	383.5	391.7	356.6	351.4	383.5	368.8	268.0	378.3	389.9	389.2	356.6	-8.4%	1.5%
India	95.5	92.6	99.3	87.8	81.8	76.9	100.5	86.4	63.8	108.7	108.1	91.4	90.7	-0.7%	4.7%
Russia	8.1	6.1	4.1	4.2	2.4	5.2	29.7	21.7	16.6	31.8	1.8	5.0	17.8	256.6%	-5.0%
Turkey	17.3	16.5	15.0	15.4	13.4	12.2	13.8	13.7	8.8	12.4	16.7	15.5	12.9	-16.8%	3.8%
UK	130.6	46.7	104.3	30.3	31.4	42.6	37.9	25.9	16.6	24.4	29.7	68.7	29.5	-57.0%	-0.9%
USA	109.9	87.7	103.6	89.7	108.0	109.3	135.5	130.5	100.8	184.4	101.0	99.8	126.9	27.2%	-1.1%
EU27	620.9	536.1	581.2	436.4	401.4	424.8	489.8	494.6	434.9	474.5	418.3	515.2	456.2	-11.5%	0.7%
Metals															
World	4,807.1	5,133.6	4,589.9	4,716.2	4,020.1	4,363.6	4,509.8	4,341.2	3,562.6	5,692.8	5,933.3	4,653.4	4,733.9	1.7%	6.7%
Australia	113.1	63.0	42.6	28.9	45.8	75.9	47.4	23.2	14.2	24.8	27.7	58.7	35.5	-39.5%	-8.1%
Brazil	82.0	131.1	121.6	191.0	170.8	138.1	133.8	135.7	117.3	186.7	204.8	139.3	152.8	9.7%	3.1%
China	1,160.2	1,290.9	1,256.7	1,394.9	1,151.8	1,256.2	1,347.8	1,343.6	1,118.2	2,067.1	2,119.1	1,250.9	1,542.0	23.3%	10.7%
India	253.0	272.7	189.8	180.1	145.3	190.3	180.7	162.5	140.2	221.1	259.2	208.2	192.4	-7.6%	10.1%
Russia	32.6	58.1	82.8	151.1	34.9	124.4	76.5	195.4	202.0	195.5	95.2	71.9	148.2	106.0%	18.2%
Turkey	21.3	46.3	48.1	34.6	42.2	45.1	44.1	49.8	78.9	104.4	53.4	38.5	62.6	62.6%	4.0%
UK	111.1	113.4	103.7	91.1	76.6	74.1	90.8	85.0	69.3	50.9	56.3	99.2	71.0	-28.4%	-5.0%
USA	216.7	218.0	202.0	198.3	145.2	141.0	140.9	123.9	112.0	132.9	150.4	196.1	133.5	-31.9%	0.6%
EU27	1,433.1	1,559.6	1,304.4	1,204.1	1,072.6	1,203.8	1,269.5	1,183.4	895.8	1,284.3	1,331.3	1,314.8	1,194.7	-9.1%	3.7%
Machinery															
World	18,649.2	18,227.8	16,514.1	14,856.7	13,115.7	13,954.9	14,598.0	14,216.9	11,612.1	14,293.4	15,593.0	16,272.7	14,044.7	-13.7%	2.9%
Australia	235.8	185.1	165.9	110.1	93.5	88.7	92.3	102.0	79.7	93.2	112.0	158.1	94.6	-40.1%	3.0%
Brazil	153.4	156.7	132.5	113.1	90.3	122.3	119.0	97.3	79.7	112.0	176.8	129.2	117.8	-8.8%	11.9%
China	4,302.5	4,288.9	4,040.0	3,843.9	3,387.1	3,711.6	4,203.1	4,075.5	3,670.5	5,052.8	5,228.5	3,972.5	4,323.7	8.	

Appendix B2: CGE Model Description and Results

1. INTRODUCTION

The impact of the EPA is assessed by developing counterfactual scenarios for the evolution of the economies in the absence of the EPA. These counterfactual scenarios are compared to the actual outcomes to identify the marginal effects of the quantifiable trade barrier reductions under the EPA.

The scenarios are developed using a multi-sector, multi-region computable general equilibrium (CGE) model. CGE models have been the workhorse models for assessing the economy-wide impact of trade agreements as they take into account:

- the simultaneous impact of such agreements on a wide range of sectors, including goods and services, that interact with each other through domestic and international supply linkages;
- behavioural responses of consumers and firms to changes in policies, including to tariffs and non-tariff barriers facing goods, and to non-tariff measures impacting services and investment; and
- the resource constraints facing the economy and the extent to which these constraints are relaxed due to the incentives for investment and for labour force participation generated by the agreement through changes in the real rates of return to capital and real wages for labour.

The mainstream CGE models used internationally, including by the European Commission's DG TRADE, are built on the Global Trade Analysis Project (GTAP) database, which incorporates a social accounting matrix (SAM) for each economy represented. Each SAM incorporates the standard national economic account aggregates (i.e., gross domestic production, consumption, investment etc.), a production function for each region-sector showing the labour, capital and land requirements, the input-output structure of the economy, and the bilateral trade flows in goods and services with every other economy/region together with the level of trade protection faced in each market. The changes in a SAM in a simulation thus provide a comprehensive economic picture of the impacts of the trade policy measures being simulated.

The next section describes the model used for the EU-SADC EPA counterfactual analysis.

2. OVERVIEW OF THE MODELLING FRAMEWORK

The specific model used for the present analysis is the GTAP-E-RD model (Corong and Strutt 2020). This in turn is based on the GTAP-RD model (Aguar et al. 2019), a recursive dynamic (RD) extension of the standard GTAP model (Corong et al. 2017). The GTAP-E-RD model extends the GTAP-RD model with a relatively detailed specification of energy inputs and associated carbon emissions.

In the recursive dynamic framework, the model calculates a new equilibrium for each period, based on the trade policy changes implemented at the beginning of that period (e.g., scheduled tariff rate cuts). The labour supply is assumed to be fixed. However, the capital stock does adjust. The change in the productive capital stock is determined by the extent of change in the real rate of return on investment. If a trade agreement such as the EPA supports higher rates of return, the incentive to invest increases the capital stock. In the recursive dynamic framework, the "end of period" capital stock in one period is the "beginning of period" capital stock in the next period. Accordingly, the productive endowments of an economy change from period to period through this mechanism. Generally, the greater the supply side response to changes in returns to factors of

production, the greater will be the response of the model in real terms. Conversely the weaker the supply side response, the greater will be the response in value terms – i.e., through changes in prices. Since there is no inflation in the CGE modelling framework, the impact on relative prices drives changes in the terms of trade an economy faces.

One notable modification to the GTAP-RD model for the EPA analysis is the updating of the Armington elasticities for services trade based on the latest estimates available from CEPII.

GTAP-RD also permits a non-zero elasticity of substitution between intermediate inputs and the basic productive factors of labour, capital and land. Although normally this elasticity is set to zero, meaning that intermediate inputs cannot substitute for sector-specific factors of production, this assumption is relaxed for the EPA analysis and a positive elasticity is introduced, following the Mirage model approach. Relaxing this assumption allows the analysis to take into account the firm’s decision whether to “unbundle” its production process and rely more on purchased intermediate inputs, including intermediates sourced internationally, to gain efficiencies.

The model is built on the GTAP 11 database (published in early 2023) with a base year of 2017. A key advantage of the latest version of the GTAP database is that it individually distinguishes all SADC EPA States (whereas the previous version 10 had combined Eswatini and Lesotho) and thus allows estimating the impacts of the EPA on all SADC EPA States individually.

2.1.Regional and Sectoral Aggregations

For the analysis of the EU-SADC EPA, the model database, which distinguishes 65 different sectors, is aggregated into 49 sectors, of which eight are services. The sectoral aggregation is shown in Table 1.

With respect to countries and regions, the model aggregates the 141 GTAP regions into 29 regions, as shown in Table 2. The SADC EPA States are each separately represented, and the EU27 is one region. The level of aggregation is higher than for sectors, but inevitable given the low sector aggregation, to keep the model manageable.

Table 1: List of sectors

Nr	Sector	Nr	Sector
1	Rice	26	Textiles
2	Wheat	27	Wearing
3	Other Grains	28	Leather
4	Vegetables, fruit and nuts	29	Wood and products
5	Oil Seeds	30	Paper & Paper Products
6	Sugar	31	Chemicals
7	Fibres crops	32	Pharmaceuticals
8	Other Crops	33	Rubber and plastics products
9	Cattle	34	Iron & Steel
10	Other primary	35	Metal products
11	Forestry	36	Computer, electronic, optical products
12	Fishing	36	Electrical equipment
13	Coal	38	Machinery and equipment
14	Oil	39	Motor vehicles and parts
15	Gas	40	Other transport equipment
16	Oil products	41	Other Manufacturing
17	Electricity	42	Construction
18	Minerals	43	Trade services
19	Cement	44	Land Transport
20	Ruminant meat	45	Water Transport
21	Other Meat	46	Air Transport
22	Vegetable Oils	47	Commercial services
23	Dairy products	48	Financial services
24	Other prepared Food	49	Public services
25	Beverages, tobacco products		

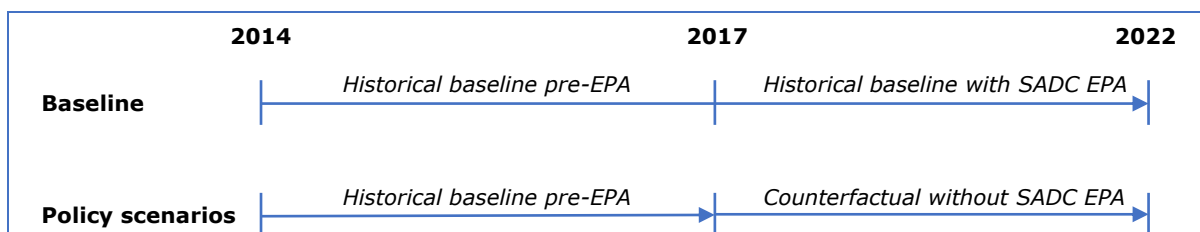
Table 2: List of regions

Nr	Country/region	Nr	Country/region
1	China	16	EU27
2	Japan	17	EFTA
3	Korea	18	UK
4	Vietnam	19	Oceania
5	Rest of ASEAN	20	Gulf Cooperation Council
6	India	21	South Africa
7	Russia	22	Mozambique
8	Turkey	23	Botswana
9	USA	24	Namibia
10	Canada	25	Lesotho
11	Mercosur	26	Eswatini
12	Mexico	27	North Africa
13	Chile	28	Rest of Africa
14	Central America	29	Rest of the World
15	Rest of America		

2.2. Baseline and policy scenarios

The model simulates the impact of the EPA by comparing the baseline, i.e. the actual trade taking place with the EPA since 2017,¹⁴ with the trade that would have taken place in the absence of the EPA with higher tariffs (the “policy scenarios”). The simulated negative impact of increasing trade barriers (when removing the EPA) is thus interpreted as the positive impact of having the Agreement in place (and avoiding higher tariffs).

Figure 61 illustrates the simulation of the counterfactual scenario. In the historical baseline, the model is calibrated to reproduce the currently observed situation. The tariff shocks are then applied to build a counterfactual scenario without the EPA in place.

Figure 61: Model baseline and policy scenarios

Baseline

The model database is simulated forward from 2017 to 2022. This simulation draws on actual and projected data for the global economy provided by international agencies including the International Monetary Fund (IMF) for macroeconomic data and the United Nations demographic data and projections for the population and labour force growth for each region. The baseline also takes into account the EU free trade agreements that have been implemented up to 2020 (e.g., the CETA with Canada and the EPA with Japan) and the impact of the USA–China tariff war. The baseline also includes the implementation of the EPA with the SADC EPA States.

The model data are in USD at 2017 prices. These can be converted to euros at 2022 prices to make the data more meaningful.

¹⁴ Although the EPA provisionally entered into force in October 2016, the start date of application is an approximation to the actual start dates of the implementation of the EPA by the various Parties.

The projected size of the EU27 economy (about €17 trillion in 2022) is larger than the actual 2022 outturn (at about versus an actual €15.9 trillion, a variance of 7.1%; Table 3). The SADC total is overstated to a greater degree with GDP projected at €520 billion versus an actual of €441 billion, a variance of 18.2%. Mozambique's size is understated in the baseline while Botswana's is overstated. These differences, which largely reflect the exchange rate appreciation of the US dollar between 2017 and 2022, impact on the reported results in value terms but would not materially affect the percentage changes generated by the simulations.

Table 3: Baseline projection of GDP – comparison to actual 2022 data (millions)

	Baseline Projection for 2022		Actual 2022	% Difference	Memo: Baseline 2022	Memo: Actual 2022
	USD @ 2017	USD @ 2022	USD @ 2022	Percent	€ @ 2022	€ @ 2022
EU27	15,163,734	17,904,490	16,713,033	7.1%	16,989,165	15,858,618
SADC	464,846	548,864	464,517	18.2%	520,805	440,770
South Africa	405,514	478,808	405,106	18.2%	454,330	384,396
Mozambique	13,385	15,804	19,157	-17.5%	14,997	18,178
Botswana	26,223	30,963	20,352	52.1%	29,380	19,312
Namibia	12,667	14,956	12,602	18.7%	14,191	11,958
Lesotho	2,429	2,868	2,463	16.4%	2,721	2,337
Eswatini	4,628	5,465	4,837	13.0%	5,186	4,590

Source: European Commission modelling results; IMF World Economic Outlook Database, October 2023; and calculations by the study team. Note: The conversion from 2017 USD to 2022 euros involves taking into account inflation in US dollar terms between 2017 and 2022 (a cumulative 18.074%) and the 2022 exchange rate (€/USD = 0.9489). The conversion rate is thus 1.1204.

Trade Baseline

The trade baseline data for 2022 are obtained by simulating the model forward and thus reflect the patterns of trade in 2017. Several basic features of the trade baseline are as follows (Table 4). The significance of these differences, if material for the qualitative outcomes, are taken into account in the analysis:

- In the projection, the EU has balanced trade with SADC partners. In reality, trade flows are much larger than projected and the EU has a significant bilateral deficit.
- The model projection to 2022 understates the growth in total services trade (which was boosted during the pandemic period).
- Rapid technological change in areas such as automotive products given the scaling up of electric vehicle production is changing the conditions of competition in the automotive sector, an important sector for EU-South Africa trade.

Table 4: Baseline projection of trade – comparison to actual 2022 data (€ millions)

	EU bilateral exports to SADC	EU bilateral imports from SADC	EU total Extra-EU Exports	EU total Extra-EU imports
CGE Model Projection				
Total Goods	29,513	31,998	2,339,406	2,071,134
Total Services	6,613	4,218	803,601	759,412
Total	36,126	36,216	3,143,008	2,830,546
Actual 2022				
Total Goods	37,961	57,585	2,635,563	3,336,453
Total Services	8,000	3,000	1,300,300	1,125,700
Total	45,961	60,585	3,935,863	4,462,153

Source: European Commission modelling results; 2022 actual data from International Trade Centre Trade Map and Eurostat.

Policy scenarios

To simulate the impact of the EPA, the commitments under the EPA are removed as from 2017, and trade between the EU and the SADC EPA partners reverts to the default trade regime in the absence of the EPA. Two specific counterfactual scenarios have been designed.

Scenario A. This is the default scenario which assumes that trade between the Parties would have continued under the regimes in place at the time. Under Scenario A, bilateral trade would thus switch from the EPA to several different regimes for the period 2017 to 2022:

- The EU's exports to Mozambique would be on an MFN basis while exports to all SACU members would take place under the EU-South Africa TDCA.¹⁵ The TDCA liberalises 86% of South Africa's imports from the EU, with exclusion or only partial liberalisation of sensitive products;
- Exports from South Africa to the EU would revert to the TDCA regime, which liberalises 95% of the EU's imports from South Africa, with exclusion or only partial liberalisation of sensitive products, which for the EU are mainly agricultural products;
- Exports from Botswana and Namibia to the EU would be subject to the EU's MFN tariffs;¹⁶
- Exports from Lesotho and Mozambique to the EU would enjoy EBA tariffs; and
- Exports from Eswatini to the EU would face GSP tariffs.

Scenario B. Scenario B has been defined as an alternative scenario to provide an indication of the "maximum cost of no EPA or other FTA". The rationale for this scenario is that the TDCA was superseded by the EPA. Thus in order to perceive the full benefits of progressive trade liberalisation between the Parties, it is useful to compare to a scenario with no FTA in place. In addition, the TDCA was concluded only between the EU and South Africa and, in the absence of an agreement with the SACU Members other than South Africa, EU exports could have faced MFN duties there. Under Scenario B, the counterfactual trade regimes assumed from 2017 to 2022 are as follows:

- EU exports to all SADC EPA States would have faced MFN tariffs (for exports to Mozambique, no change compared to Scenario A);
- Exports from Botswana, Namibia and South Africa to the EU would be subject to the EU's MFN tariffs (for Botswana and Namibia, no change compared to Scenario A); and
- Exports to the EU from Lesotho and Mozambique would have taken place under the EBA, and from Eswatini under the GSP (no change compared to Scenario A).

It is important to note that the simulation only comprises changes in tariffs. Changes in non-tariff barriers – for both goods and services – resulting from the EPA are not modelled. This means that the simulations only capture a part of the EPA's effects, and in particular

¹⁵ Although the TDCA was concluded only between the EU and South Africa, de facto (and at least in the case of Botswana also de jure), other SACU members also applied the TDCA on their imports as a result of the SACU CET implementation (see Stevens and Kennan 2007b; 2007a).

¹⁶ Botswana and Namibia (in addition to Eswatini/Swaziland) were included in the GSP on 1 October 2014 but graduated from the GSP as a result of being upper middle-income countries; see Commission Delegated Regulation (EU) No 1016/2014 of 22 July 2014 amending Annex II to Regulation (EU) No 978/2012 of the European Parliament and of the Council applying a scheme of generalised tariff preferences, OJ L 283/23, 27.9.2014.

any simulated changes in services sectors are exclusively the result of indirect adjustment effects across the economies. This constitutes an important limitation of the simulation.

3. EU-SADC EPA IMPACT – OVERVIEW OF CGE RESULTS

In general, the modelling results suggest that the EPA had a positive impact on both the EU and the SADC region.

Under Scenario A, the EPA lowers the trade-weighted tariff facing EU exporters to the SADC parties from 5.74% to 0.5%; at the same time, it reduces the EU trade-weighted tariff on imports from the SADC EPA States from 1.44% to a negligible 0.03%. This reduction is estimated to have expanded two-way trade substantially between the EU and the SADC partners by about 5.9%, contributing to a positive impact on real GDP (on the order of 0.0018% for the EU but sixteen times that for SADC at 0.029%). Economic welfare improved as a result, both within the EU (a gain of €543 million) and across the SADC region as a whole (a gain of €452 million).

Under Scenario B, the EPA impact is substantially greater, reflecting the greater loss in market access under the counterfactual of no EPA. Two-way trade expanded by about 20%, contributing to real GDP gains that are about 36% larger for the EU (a gain of 0.0025%) and almost 50% greater for the SADC partners (a gain of 0.044%). Economic welfare improved as a result, both within the EU (a gain of €593 million) and across the SADC region (a gain of almost €1.6 billion).

The aggregate trade impacts for Scenario A are set out in Table 5. The EPA boosts the EU27's exports to the SADC partners by €3.07 billion and raises the level of its imports from the SADC partners by €1.29 billion. The impact of the EPA on bilateral exports and imports varies considerably across the SADC partners: for example, Namibia's impact is mostly on its exports to the EU, while Mozambique's and Lesotho's impacts are largely on their imports from the EU. Botswana and Eswatini have more balanced impacts on their trade flows with the EU (although these impacts are quite limited).

Table 5: Changes in bilateral trade, 2022, Scenario A

	South Africa	Mozambique	Botswana	Namibia	Lesotho	Eswatini	SADC Total
	€ millions at 2022 prices						
EU Bilateral Exports	2,701	275	29	34	24	8	3,070
SADC Bilateral Exports	1,003	8	12	266	1	3	1,292
	Percent						
EU Bilateral Exports	7.7	20.2	5.5	3.0	48.1	4.6	8.0
SADC Bilateral Exports	3.4	0.5	0.4	14.1	0.3	2.7	3.6

Source: Simulations by the European Commission; and calculations by the study team.

Table 6 sets out the impacts on economic welfare and on real GDP for the parties. The impacts on the SADC partners vary widely, reflecting the differences in the incidence of tariffs under the no-EPA scenario. All parties experience an increase in real GDP, with a few of the gains being relatively strong (Lesotho's gain of 0.14% and Mozambique's of almost 0.11%). The EU's gain is modest at 0.0018%. The welfare gains are less consistent as negative terms of trade impacts offset the gains in real economic activity for Mozambique, Lesotho and Eswatini. The aggregate SADC gain is €452 million. For the EU27, the welfare gain is about €543 million.

Table 6: Impacts on economic welfare and real GDP, 2022, Scenario A

	EU27	South Africa	Mozambique	Botswana	Namibia	Lesotho	Eswatini	SADC Total
Economic Welfare (€ millions)	543	293	-10	19	149	2	0	452
Real GDP (% change)	0.0018	0.025	0.108	0.021	0.075	0.140	0.043	0.029

Source: Simulations by the European Commission; and calculations by the study team.

Under Scenario B, the EPA boosted two-way bilateral trade by €15 billion or by just over 20%. The bilateral trade expansion is much more balanced under this scenario with EU exports to SADC partners expanding by €8.85 billion or by 23% and SADC exports to the EU expanding by €6.2 billion or by 17%. The major part of the impact is due to additional trade with South Africa. As under Scenario A, the impact of the EPA on exports and imports varies considerably across the SADC partners: Namibia's impact remains mostly on its bilateral exports to the EU while Mozambique's continues to be largely on its imports from the EU.

Table 7: Changes in bilateral trade, 2022, Scenario B

	South Africa	Mozambique	Botswana	Namibia	Lesotho	Eswatini	SADC Total
€ millions at 2022 prices							
EU Bilateral Exports	8,352	276	81	91	27	21	8,849
SADC Bilateral Exports	5,880	-2	13	273	1	4	6,168
Percent							
EU Bilateral Exports	23.9	20.3	15.7	8.1	54.2	12.4	23.2
SADC Bilateral Exports	20.1	-0.1	0.5	14.4	0.2	4.0	17.1

Source: Simulations by the European Commission; and calculations by the study team.

The stronger trade expansion contributed to real GDP gains that are 37% larger for the EU (a gain of 0.0025%) and almost 50% greater for the SADC partners (a gain of 0.044%) compared to Scenario A (Table 8). Economic welfare improved as a result, both within the EU (a marginal increase to €593 million) and across the SADC region (a much more substantial increase to €1.6 billion).

Table 8: Impacts on economic welfare and real GDP, 2022, Scenario B

	EU27	South Africa	Mozambique	Botswana	Namibia	Lesotho	Eswatini	SADC Total
Economic Welfare (€ millions)	593	1,507	-16	2	124	-4	-13	1,599
Real GDP (% change)	0.0025	0.042	0.103	0.006	0.087	0.183	0.092	0.044

Source: Simulations by the European Commission; and calculations by the study team.

4. ECONOMIC IMPACTS IN DETAIL – SCENARIO A

4.1. Macro impacts

The impacts of the EPA on the EU are relatively modest under Scenario A (Table 9). Real GDP improves by about 0.002% due to the EPA. Since the labour supply is fixed, this gain reflects rising labour productivity, which would support higher real wages. In the absence of a labour supply response, increased demand for labour translates into increases in real wages well above productivity gains however. This in turn drives up EU prices as reflected in the positive terms of trade effect (terms of trade improve by 0.0024%), the increase in the GDP deflator (by 0.005%) and increases in consumer prices (by 0.0036%).

The net result of these various impacts is a relatively strong increase in the value of EU GDP by €1.17 billion. However, the higher consumer prices offset some these gains resulting in an improvement in household welfare of about half that amount or €543 million.

Overall, the EPA contributes to making the EU a more open economy with two-way global trade expanding by about 0.013%. The increase in real GDP is consistent with this degree of increased openness: the ratio of real GDP gains to increases in trade volumes is about 0.14, which is well within historical experience. Indeed, all things considered, the estimated real economic gains are likely understated and the price responses overstated. In short, these gains are conservative estimates of the benefits of the EPA.

Table 9: Macroeconomic impacts on the EU27, 2022, Scenario A

SCENARIO A	EU27
Major Indicators	
Economic Welfare (€ millions)	543
GDP value change (€ millions)	1,174
GDP value change (%)	0.0069
GDP volume (% change)	0.0018
GDP deflator (% change)	0.0051
Terms of Trade (% change)	0.0024
CPI (% change)	0.0036
Real wage Unskilled labour (% change)	0.0053
Real wage skilled labour (% change)	0.0059
Volume of merchandise exports (% change)	0.0114
Volume of merchandise imports (% change)	0.0146
Key Ratios	
Real Wages/Productivity	3.10
Real GDP/Trade volume	0.14

Source: Simulations by the European Commission; and calculations by the study team.

The impacts of the EPA on **the SADC partners** are set out in Table 10. Generally, the impacts are an order of magnitude larger in aggregate compared to those on the EU; and the impacts on South Africa dominate the overall results for SADC as a whole.

Table 10: Macroeconomic impacts on SADC EPA states, 2022, Scenario A

SCENARIO A	ZAF	MOZ	BWA	NAM	LSO	SWZ	SADC
Major Indicators							
Economic Welfare (€ millions)	293	-10	19	149	2	0	452
GDP value change (€ millions)	195	-27	18	293	0	-5	474
GDP value change (%)	0.043	-0.181	0.060	2.067	-0.012	-0.089	0.091
GDP volume (% change)	0.025	0.108	0.021	0.075	0.140	0.043	0.029
GDP deflator (% change)	0.018	-0.288	0.039	1.992	-0.152	-0.132	0.062
Terms of Trade (% change)	0.026	-0.047	0.013	1.371	-0.144	-0.085	0.058
CPI (% change)	-0.018	-0.172	0.026	1.199	-0.158	-0.093	0.012
Real wage unskilled labour (% change)	0.207	0.335	0.072	1.136	0.139	-0.133	0.225
Real wage skilled labour (% change)	0.186	0.425	0.061	0.313	0.110	-0.189	0.186
Volume of merch. exports (% change)	0.869	0.414	0.099	0.299	-0.073	-0.048	0.783
Volume of merch. imports (% change)	1.057	0.243	0.095	1.812	-0.183	-0.133	0.982
Key Ratios							
Real Wages/Productivity	0.13	0.28	0.32	0.10	1.12	-0.27	0.14
Real GDP/Trade volume	0.03	0.33	0.22	0.07	-1.09	-0.48	0.03

Source: Simulations by the European Commission; and calculations by the study team.

Real GDP improved by about 0.03% for the SADC region as a whole as a result of the EPA. South Africa's real GDP impact is marginally smaller (at about 0.025%) while the smaller economies (in particular Mozambique, Namibia and Lesotho) realized stronger gains on the order of 0.075 to 0.14%. Botswana and Eswatini realized more limited gains from the EPA (0.021% and 0.043% respectively).

The simulations suggest that real wages rose steeply in the SADC region as a whole as a result of the EPA (with unskilled labour realizing increases of 0.186% and skilled labour realizing gains of 0.225%). As with the EU, these gains are well above productivity gains and drive strong price effects in the SADC region. The simulations suggest that terms of trade improved by 0.058% and the GDP deflator by a similar amount (0.062%). Increases in consumer prices were more muted (0.012%).

However, the price impacts vary considerably across the SADC region, with different causal factors dominating.

- In South Africa, strong real wage gains alongside terms of trade improvement support an increase in the GDP deflator. However, consumer prices still fall as the tariff cuts reduce the price of imports. The combination of rising value of output and falling consumer prices support a gain in economic welfare of €293 million, substantially greater than the increase in the value of GDP of €195 million.
- Namibia experiences a large increase in real wages (1.14% for unskilled labour and 0.3% for skilled) while terms of trade improve by 1.37%. These drive an increase in the GDP deflator of 2%. Combined with the modest increase in the quantity of production (a real increase in GDP of 0.075%), this in turn results in an increase in the value of GDP of €293 million or about 2.1%. In contrast to South Africa, the rising consumer prices restrict welfare gains to €149 million, which is nonetheless a substantial gain. Botswana's outcome is similar to Namibia's although the impacts are substantially smaller.
- Mozambique, Lesotho and Eswatini all experience negative price impacts with the terms of trade, the GDP deflator and consumer prices all lower as a result of the EPA. As a result, all three make either minimal gains in the value of GDP and economic welfare or even modest declines. In the case of Mozambique and Lesotho, these outcomes on economic welfare come despite rising real wages and increasing real output and thus unusual. In the case of Eswatini, the decline in real wages offsets the gain in real output.

The strong rise in two-way trade is consistent with the real GDP increase in the SADC region – indeed, the real GDP gain can be considered to be understated given the positive outcome on two-way trade. The strength of the real wage gains compared to productivity gains also suggests that price increases were in reality lower and real gains were higher.

4.2.Sectoral impacts

As regards the **sectoral impacts of the EPA in the EU under Scenario A** (Table 11 below), virtually all EU sectors witness an increase in bilateral exports to SADC partners. By far the largest increase in bilateral exports for the EU due to the EPA is in motor vehicles and parts. This sector experienced an increase of close to €1.66 billion in exports to SADC partners. Other sectors making strong export gains due to tariff reductions include wearing apparel (a gain of €332 million in additional exports), rubber and plastic products (€181 million), and leather goods (€102 million). Two services sectors also experience an increase in bilateral exports: commercial services (€166 million) and trade services (€104 million); these gains are due to the EPA-driven income gains in SADC partners as well as the increased bilateral flow of trade.

The majority of EU sectors also see an increase in bilateral imports, although a significant minority see a modest decline due to reallocation of expenditures in the EU towards products benefiting from tariff reductions. By far the largest increase in imports from SADC is in the motor vehicles and parts sector (an increase in imports of €425 million). Other notable sectors seeing an increase in import penetration from SADC sources include sugar (€220 million), prepared foods (€176 million), and vegetables fruits and nuts (€132 million). Trade services imports also rise by €151 million due to the increased trade with the EU and commercial services imports rise by €89 million due to income gains in the EU.

The impact on production in the EU varies by sector depending not only on the direct trade impact of the EPA but on the extent to which the increased bilateral exports and imports displace trade with other countries, including within the EU itself, and also on domestic sales driven by the income gains from the EPA. To illustrate the importance of taking these various effects into account, the computer, electronic and optical products sector made modest bilateral export gains (€28 million) and witnessed only modest import penetration from SADC suppliers (€0.6 million) as a result of the EPA. However, due to rising real wages in the EU, exports to third parties declined, resulting in a decline in total exports to the world of €82 million, a decline in intra-EU exports of €55 million, and a decline in domestic sales of €30 million. The net result was a decrease in the value of shipments to all destinations, domestic and foreign, of €167 million. By contrast, the auto sector converted its major gain in bilateral exports of €1.66 billion into an increase in total sales of €1.3 billion, while the apparel sector converted its bilateral export gain of €332 million into an almost equivalent gain in total shipments of €330 million given limited import penetration from the SADC partners and a modest increase in intra-EU exports and domestic shipments driven by the income gains in the EU.

The EU sectors that experience the largest gains in total sales were those that built on their export gains to SADC with additional sales in the EU. In addition to autos and apparel, these include rubber and plastics products which realised a total gain of €227 million in sales compared to bilateral export gains to SADC partners of €182 million; textiles, which added to the €43 million in additional bilateral exports a strong gain in intra-EU exports and domestic sales to enjoy a net gain of €124 million; and the leather products sector which consolidated its export gains to SADC partners of €102 million to expand total sales by the same amount. However, in addition to sectors that made gains due to bilateral trade liberalization, a number of services sectors substantially increased their total output due to the income gains from the EPA. These include public services (an increase in output of €526 million), commercial services (which build on the €166 million bilateral export gain to increase total sales by €373 million) and trade services (which double their bilateral export gains of €104 million to raise total sales by €203 million). Construction services and financial services, which make little in the way of bilateral export gains also increase total sales by over €100 million through stronger domestic performance.

A number of EU sectors experienced an overall decline in total sales as bilateral imports from SADC displaced either intra-EU exports or domestic sales. Sectors experiencing a decline in total sales were sugar (€336 million, reflecting mainly increased import penetration from SADC of €220 million and reallocation of expenditures within the EU to other products benefiting from EU tariff reductions); the aforementioned computer, electronic and optical products (a decline of €167 million); the vegetables, fruits and nuts sector which saw a decline in total sales of €130 million, mostly driven by increased imports from SADC partners of €132 million; and prepared foods, which experienced a similar reduction in total sales of €130 million due to increased SADC imports of €176 million.

Overall, the EU experienced a gain in total sales across all sectors of €2.7 billion, compared to the total export gains to SADC of €3.1 billion. The sectors making the largest gains in value-added in percentage terms were apparel (an increase in value-added of 0.21%), motor vehicles and parts (0.13%) and leather (0.097%). Other sectors making notable

gains in percentage terms are textiles (0.067%), rubber and plastics (0.051%), and wheat (0.025%). Of the declining sectors, the only one which was palpable in percentage terms was sugar, where value-added declined by 1.1%. As noted above, this was only partially attributable to increased import penetration. The only other sector with a notable percentage decline in value added was vegetables, fruit and nuts (-0.11%).

As regards the **sectoral impacts of the EPA on SADC under Scenario A** (Table 12), half of the SADC sectors witness an increase in bilateral exports to the EU. However, a significant minority (14 of the 49 sectors in the model) experience small declines in bilateral exports that register at the first decimal point. This reflects the fact that EU tariffs are often zero in the counter-factual scenario where there is no EPA. Accordingly, SADC sectors that do not enjoy a tariff reduction tend to see reallocation of resources to other SADC sectors that do enjoy such reductions. These effects are very small, however.

By far the largest increase in bilateral exports for SADC due to the EPA is in motor vehicles and parts (€415 million). Other sectors making strong export gains due to the EPA include sugar (€207 million), prepared foods (€164 million), and vegetables, fruits and nuts (€112 million). SADC parties also increase their trade services exports to the EU of €151 million, reflecting the increased flow of bilateral trade.

The impact of the EPA on SADC imports mirrors the impacts reported above for EU bilateral exports. Notably, virtually every sector in the SADC economies experienced increased imports from the EU, reflecting the larger and more pervasive tariff shock in the counterfactual scenario where there is no EPA.

SADC sectors that significantly expanded bilateral exports also dominate the leader board for total shipments due to the EPA. These include automotive (€415 million in exports to the EU and €402 million in total shipments) sugar (€207 million and €375 million respectively); prepared foods (€166 million and €177 million respectively); and vegetables fruits and nuts (€112 million and €162 million respectively).

Equally importantly for the SADC economies are the gains in economic output that are made in sectors that do not enjoy significant bilateral export gains due to EU tariff reductions under the EPA but do enjoy strengthened domestic demand from the income effects of the EPA. For example, the cattle sector expands exports to the EU by only €0.68 million but total sales by €275 million. Similarly, non-traded sectors benefit in terms of increased output despite no direct liberalization effect from the EPA. Notable gains are made by public services (which expands by €365 million) and construction (€54 million). Trade services, which do increase bilateral exports to the EU (by €151 million), experience much greater expansion of sales overall due to the stronger domestic demand (total sales increases of €281 million).

A number of SADC sectors experienced an overall decline in total sales as increased penetration of bilateral imports displaced domestic sales. These sectors are primarily in manufacturing. The apparel sector experienced a decline in total sales of €138 million, reflecting mainly increased import penetration from the EU of €332 million. Metal products experienced a decline of €126 million reflecting a combination of increased bilateral imports of €58 million, reduced domestic demand of €14, and reduced global competitiveness due to the higher real wages induced by the EPA, which contributed to an overall decline in global exports of €112 million despite an increase of bilateral exports to the EU of €83 million. Rubber and plastic products saw a decline in total sales of €74 million, mostly driven by increased imports from the EU partners of €183 million. Machinery and equipment experienced a similar reduction in total sales of €71 million due to increased bilateral imports of €82 million. Other sectors that witnessed modest declines in total sales due to increased penetration by EU imports include paper and paper products, other manufacturing, textiles, electrical equipment and chemicals.

At the same time, the stronger impact of the EPA on SADC economies results in larger structural change across the economy as gaining sectors draw productive resources away from declining sectors, as internal demand for intermediate inputs shifts, or as sectors lose ground in other international markets due to the higher real wages induced by the EPA. For example, other transport equipment, which experiences a marginal decline in imports from the EU and thus is not impacted by increased import penetration under the EPA, still sees an erosion in total sales of €56 million due mainly in this case to reduced global exports of €58 million. Similarly, the minerals sector, which is minimally impacted by the EPA directly, experiences a decline in total sales of €55 million due to a combination of reduced global sales and reduced domestic demand from structural change in the SADC economies.

Overall, the SADC economies experienced a gain in total sales across all sectors of €1.8 billion, of which €1.4 billion came from increased total exports (mostly accounted for by increased bilateral exports to the EU of €1.3 billion) and increased domestic shipments of €349 million driven by the income gains generated by the EPA in the SADC EPA economies.

The sectors making the largest gains in value-added in percentage terms are mainly in the food and agriculture sectors. These include sugar (a gain in value added of 3.3%), fishing (2.5%), cattle (2%), prepared foods (1.6%) and vegetables, fruits and nuts (1.6%). Motor vehicles and parts was the industrial sector reaping the greatest benefit from the EPA in terms of expanded value-added (a gain of 2.4%). The sectors seeing the largest declines in value-added are all manufacturing sectors: apparel (-2.74%), leather (-1.1%), rubber and plastics (-0.75%), machinery and equipment (-0.42%), other transport equipment (-0.31%), other manufacturing (-0.23%), paper and paper products (-0.22%) and textiles (-0.21%).

Table 17 to Table 22 in the annex provide the detailed sectoral impacts under Scenario A for each SADC EPA State.

Table 11: Sectoral impacts in the EU (€ millions) - Scenario A

EU27	EU Exports to SADC	EU Imports from SADC	EU Total Extra-EU Exports	EU Total Extra-EU Imports	Intra-EU Exports	Domestic Shipments	Total Shipments	Total Shipments % change	Share of Value Added	Value Added % change	Unskilled labour % change	Skilled labour % change
1 Rice	0.0	0.0	-0.1	0.2	-0.2	-0.3	-0.6	-0.01	0.023	-0.006	-0.006	-0.006
2 Wheat	9.6	0.0	7.0	0.6	-0.6	-0.2	6.2	0.02	0.138	0.025	0.024	0.025
3 Other Grains	0.3	0.0	0.2	-0.1	-0.8	-0.8	-1.4	0.00	0.118	-0.005	0.001	0.001
4 Vegetables, fruit, nuts	1.0	132.4	-22.0	96.2	-62.6	-45.5	-130.1	-0.10	0.781	-0.107	-0.089	-0.088
5 Oil Seeds	0.1	-0.1	-0.2	0.0	-1.2	-4.0	-5.4	-0.01	0.226	-0.009	-0.004	-0.003
6 Sugar	0.3	219.9	-56.8	169.4	-109.4	-169.7	-335.9	-1.13	0.069	-1.102	-1.098	-1.098
7 Fibres crops	0.0	0.0	-0.2	0.1	0.0	0.2	-0.1	0.00	0.027	-0.006	0.001	0.001
8 Other Crops	0.5	0.2	-0.9	2.1	-3.1	-3.3	-7.4	-0.02	0.157	-0.021	-0.014	-0.013
9 Cattle	0.7	0.7	0.1	1.0	-0.4	2.4	2.2	0.00	0.531	0.005	0.007	0.008
10 Other primary	0.0	-0.6	0.0	-0.1	0.1	1.0	1.0	0.00	0.402	0.004	0.006	0.007
11 Forestry	0.0	0.0	-0.4	0.6	0.0	3.2	2.9	0.00	0.254	0.005	0.007	0.007
12 Fishing	0.0	3.5	0.0	1.9	-1.9	-1.6	-3.5	-0.01	0.102	-0.015	-0.006	-0.006
13 Coal	0.0	-0.1	0.0	2.3	-0.3	-1.9	-2.2	-0.01	0.084	-0.007	-0.015	-0.015
14 Oil	0.0	0.0	0.0	3.4	-0.3	-1.9	-2.3	-0.01	0.102	-0.014	-0.008	-0.008
15 Gas	0.0	0.1	-0.2	14.4	-1.8	-8.7	-10.6	-0.03	0.164	-0.033	-0.029	-0.028
16 Oil products	1.0	-0.2	-1.1	3.7	-0.2	7.5	6.2	0.00	0.081	0.007	-0.001	-0.001
17 Electricity	0.6	-0.1	-0.6	2.3	0.1	30.0	29.5	0.01	1.483	0.008	0.007	0.007
18 Minerals	0.6	-3.7	2.8	4.6	1.7	5.2	9.7	0.01	0.455	0.008	0.009	0.010
19 Cement	9.3	-0.2	-0.5	6.4	1.3	12.4	13.2	0.00	0.595	0.006	0.006	0.006
20 Ruminant meat	2.0	9.1	-4.9	9.0	-4.6	-1.0	-10.5	-0.01	0.115	-0.005	-0.006	-0.006
21 Other Meat	19.5	0.6	14.5	1.3	0.5	5.4	20.4	0.01	0.234	0.017	0.017	0.017
22 Vegetable Oils	5.6	0.0	3.6	1.8	-3.8	-4.3	-4.5	-0.01	0.068	0.001	0.000	0.000
23 Dairy products	4.4	0.1	0.5	1.2	0.1	5.2	5.8	0.00	0.262	0.008	0.008	0.008
24 Other prepared Food	13.7	176.3	4.8	149.4	-81.6	-53.3	-130.0	-0.02	1.220	-0.012	-0.012	-0.012
25 Beverages, tobacco products	4.3	29.1	-3.0	26.0	-11.5	-4.5	-19.0	-0.01	0.617	0.000	0.000	0.000
26 Textiles	43.4	0.0	31.7	36.4	17.6	74.8	124.2	0.06	0.335	0.067	0.066	0.066
27 Wearing	332.3	0.6	318.3	55.2	0.3	11.7	330.3	0.20	0.266	0.208	0.208	0.208
28 Leather	102.2	2.1	88.5	28.4	1.4	12.2	102.1	0.09	0.187	0.097	0.097	0.097
29 Wood and products	2.0	0.8	-3.5	5.1	-1.1	4.1	-0.6	0.00	0.283	0.002	0.002	0.001
30 Paper & Paper Products	55.0	-0.3	42.8	7.1	8.0	29.5	80.3	0.02	1.035	0.019	0.018	0.018
31 Chemicals	46.7	14.4	-15.7	58.9	-12.7	18.1	-10.2	0.00	1.523	0.001	0.000	-0.001
32 Pharmaceuticals	5.6	-0.1	-35.3	21.5	-17.6	-0.1	-53.0	-0.01	1.243	-0.009	-0.009	-0.009
33 Rubber and plastics products	181.8	-0.2	157.8	25.5	16.2	53.1	227.2	0.05	0.978	0.051	0.051	0.051
34 Iron & Steel	2.4	-4.2	-11.6	13.4	5.8	34.7	28.9	0.01	0.548	0.008	0.007	0.007
35 Metal products	58.0	84.2	12.0	105.8	-36.5	40.2	15.7	0.00	1.793	0.004	0.004	0.004
36 Computer, electronic, optical products	28.1	0.6	-82.1	70.7	-55.2	-30.0	-167.3	-0.02	1.324	-0.018	-0.018	-0.018
37 Electrical equipment	47.8	-0.2	-19.9	58.8	9.9	27.5	17.5	0.00	1.101	0.006	0.006	0.006
38 Machinery and equipment	82.2	-4.0	-46.2	49.4	-2.0	12.4	-35.8	0.00	2.092	0.000	0.000	-0.001
39 Motor vehicles and parts	1,656.8	424.6	1,370.2	452.5	-172.3	99.1	1,296.9	0.12	1.318	0.126	0.126	0.126
40 Other transport equipment	-1.6	1.8	-39.5	17.2	-16.6	-10.6	-66.6	-0.02	0.463	-0.019	-0.019	-0.020
41 Other Manufacturing	24.4	3.6	-7.3	34.8	-10.4	16.4	-1.3	0.00	1.010	0.003	0.003	0.003
42 Construction	3.8	0.8	0.1	2.6	-0.3	137.4	137.2	0.01	4.874	0.008	0.009	0.009
43 Trade services	103.9	151.0	31.1	132.3	-81.0	252.8	202.9	0.00	14.286	0.007	0.008	0.009
44 Land Transport	0.3	-0.3	-2.5	3.0	1.1	69.4	68.0	0.01	2.718	0.008	0.009	0.010
45 Water Transport	0.0	0.0	-1.1	4.6	-0.4	1.6	0.0	0.00	0.554	0.016	0.018	0.019
46 Air Transport	1.3	-2.3	-3.8	4.0	0.9	6.2	3.3	0.00	0.266	0.007	0.010	0.011
47 Commercial services	165.6	88.5	77.7	129.6	-43.1	338.7	373.3	0.01	23.380	0.008	0.007	0.007
48 Finance services	54.1	24.5	33.8	36.9	-10.2	77.1	100.7	0.01	4.680	0.009	0.009	0.008
49 Public services	0.4	-1.2	-12.4	6.0	-0.4	538.9	526.1	0.01	25.435	0.010	0.010	0.010
Total	3,070.0	1,340.5	1,825.6	1,857.7	-679.0	1,585.3	2,732.0	0.01	100	0.0080	0.0090	0.0096

Source: Simulations by the European Commission; and calculations by the study team. Note: the data for labour represent the total expenditure in the sector for labour = employment times wages.

Table 12: Sectoral impacts in the SADC EPA states (€ millions) - Scenario A

SADC	SADC Exports to EU	SADC Imports from EU	SADC Total Exports	SADC Total Imports	Memo: Intra-SADC Exports	Domestic Shipments	Total Shipments	Total Shipments % change	Share of Value Added	Value Added % change	Unskilled labour % change	Skilled labour % change
1 Rice	0.0	0.0	-0.1	3.3	0.0	-0.1	-0.2	-0.01	0.100	0.046	0.071	0.043
2 Wheat	0.0	9.6	-0.2	8.6	0.1	7.1	7.0	0.78	0.101	0.169	-0.190	0.897
3 Other Grains	0.0	0.3	-0.2	2.6	0.8	30.8	30.6	0.89	0.315	0.933	0.624	0.886
4 Vegetables, fruit, nuts	112.3	1.0	146.1	5.0	2.0	15.8	161.9	1.43	1.237	1.324	0.761	1.677
5 Oil Seeds	-0.1	0.1	0.0	0.2	-0.1	1.1	1.0	0.07	0.118	0.149	0.183	0.177
6 Sugar	207.0	0.3	345.1	9.3	4.3	29.7	374.8	4.77	0.256	3.309	3.640	5.027
7 Fibres crops	0.0	0.0	-0.2	0.6	0.1	0.0	-0.2	-0.12	0.026	-0.096	0.065	-0.189
8 Other Crops	0.2	0.5	-0.1	3.3	0.3	0.1	0.0	0.01	0.046	-0.003	0.066	-0.013
9 Cattle	0.7	0.7	7.1	13.3	7.4	267.9	275.1	1.92	1.233	2.046	1.582	1.926
10 Other primary	-0.6	0.0	-3.3	0.1	0.0	8.2	4.9	0.12	0.297	0.190	0.155	0.128
11 Forestry	0.0	0.0	0.8	0.0	0.0	2.9	3.7	0.13	0.213	0.423	0.530	0.167
12 Fishing	3.0	0.0	2.7	0.3	0.0	62.7	65.4	1.96	0.338	2.469	3.213	0.524
13 Coal	-0.1	0.0	-7.8	0.0	0.0	7.0	-0.7	0.00	2.071	0.050	0.028	0.160
14 Oil	0.0	0.0	0.1	4.5	0.0	0.0	0.0	0.05	0.009	0.132	0.166	0.296
15 Gas	0.1	0.0	5.8	5.7	5.5	-6.0	-0.1	-0.01	0.155	0.425	0.125	0.094
16 Oil products	-0.1	1.0	-2.0	10.0	0.6	19.1	17.1	0.09	0.234	0.210	0.048	0.054
17 Electricity	-0.1	0.6	5.3	9.9	7.3	25.8	31.1	0.07	3.729	0.109	0.089	0.092
18 Minerals	-3.6	0.6	-21.1	9.1	2.5	-33.4	-54.5	-0.07	6.872	-0.031	0.018	-0.001
19 Cement	-0.2	9.3	-0.4	10.5	1.0	-0.2	-0.7	-0.01	0.414	0.092	0.075	0.082
20 Ruminant meat	8.8	2.0	17.1	1.3	-3.1	9.8	27.0	0.62	0.137	0.780	0.773	0.473
21 Other Meat	0.6	19.5	-12.7	8.4	-12.9	0.7	-12.1	-0.21	0.229	-0.235	-0.217	-0.138
22 Vegetable Oils	0.0	5.6	-0.6	6.8	0.2	32.4	31.7	0.23	0.704	0.284	0.283	0.288
23 Dairy products	0.1	4.4	-0.1	4.4	0.2	12.3	12.2	0.83	0.049	0.954	0.857	1.190
24 Other prepared Food	163.7	13.7	149.7	21.2	-2.1	26.9	176.6	2.31	0.670	1.601	1.306	0.964
25 Beverages, tobacco products	28.0	4.3	40.0	8.2	2.2	43.7	83.7	0.57	0.994	0.618	0.581	0.555
26 Textiles	0.0	43.4	0.4	10.0	0.4	-35.6	-35.2	-0.63	0.298	-0.208	-0.311	-0.290
27 Wearing	0.6	332.3	-47.0	122.4	-52.6	-90.6	-137.6	-2.76	0.272	-2.740	-2.757	-2.756
28 Leather	2.0	102.2	-0.5	37.1	-2.1	-15.8	-16.3	-1.22	0.051	-1.129	-1.139	-1.207
29 Wood and products	0.7	2.0	0.3	3.3	0.1	3.4	3.7	0.10	0.201	0.201	0.198	0.197
30 Paper & Paper Products	-0.2	55.0	-7.8	36.8	-2.0	-42.5	-50.3	-0.35	1.025	-0.223	-0.271	-0.215
31 Chemicals	13.6	46.7	-8.3	33.0	1.9	-19.1	-27.4	-0.12	1.323	0.039	-0.022	-0.016
32 Pharmaceuticals	-0.1	5.6	0.3	11.5	3.0	-1.2	-0.9	-0.02	0.207	0.085	0.069	0.078
33 Rubber and plastics products	-0.2	181.8	-4.6	100.2	-3.1	-69.4	-74.0	-0.90	0.344	-0.752	-0.784	-0.768
34 Iron & Steel	-4.0	2.4	-26.5	11.8	0.2	23.4	-3.1	-0.02	0.307	0.028	-0.012	0.003
35 Metal products	82.6	58.0	-112.1	24.1	-19.2	-14.4	-126.5	-0.25	1.209	-0.088	-0.113	-0.173
36 Computer, electronic, optical products	0.6	28.1	-1.3	8.9	-3.0	-0.2	-1.5	-0.02	0.599	0.251	0.255	0.272
37 Electrical equipment	-0.2	47.8	-15.8	19.5	-11.7	-14.0	-29.8	-0.32	0.301	-0.185	-0.190	-0.170
38 Machinery and equipment	-3.9	82.2	-26.2	56.4	-8.5	-44.7	-70.9	-0.47	0.201	-0.415	-0.428	-0.365
39 Motor vehicles and parts	415.1	1656.8	824.8	639.0	-9.0	-422.4	402.4	1.35	0.966	2.391	2.413	2.465
40 Other transport equipment	1.8	-1.6	-58.1	-5.3	0.9	2.5	-55.6	-1.64	0.152	-0.311	-0.341	0.340
41 Other Manufacturing	3.5	24.4	-33.5	17.6	-1.1	-13.5	-47.0	-0.36	0.403	-0.231	-0.283	-0.280
42 Construction	0.8	3.8	0.6	2.1	0.0	53.9	54.5	0.10	2.965	0.194	0.196	0.175
43 Trade services	151.0	103.9	172.6	59.5	-3.3	108.4	281.1	0.24	12.428	0.299	0.309	0.279
44 Land Transport	-0.3	0.3	-1.1	1.2	0.0	33.9	32.8	0.10	2.323	0.204	0.225	0.200
45 Water Transport	0.0	0.0	-0.2	0.4	0.0	0.6	0.5	0.04	0.205	0.156	0.175	0.140
46 Air Transport	-2.3	1.3	-7.5	4.0	-0.4	4.4	-3.2	-0.03	0.343	0.017	0.108	0.057
47 Commercial services	88.5	165.6	128.4	107.4	-1.5	-50.5	77.9	0.04	15.105	0.129	0.115	0.127
48 Finance services	24.5	54.1	31.0	41.4	-1.3	17.9	48.8	0.08	6.452	0.147	0.140	0.153
49 Public services	-1.2	0.4	-5.3	2.4	-0.1	370.3	365.0	0.14	31.773	0.209	0.298	0.162
Total	1292.5	3070.0	1473.7	1491.0	-96.3	349.2	1822.9	0.15	100	0.2394	0.2441	0.1779

Source: Simulations by the European Commission; and calculations by the study team. Note: the data for labour represent the total expenditure in the sector for labour = employment times wages.

5. ECONOMIC IMPACTS IN DETAIL – SCENARIO B

5.1. Macro impacts

The impacts of the EPA on **the EU** under Scenario B are set out in Table 13. In general, the impacts are stronger than under Scenario A but remain comparatively modest. The real GDP gain from the EPA increases to 0.0025% (compared to 0.0018% under Scenario A). However, the price impacts are substantially greater. Real wages rise by 0.0117% for both skilled and unskilled labour, roughly double the rise in Scenario A. While the terms of trade improvement is smaller at 0.0010% (compared to 0.0024% in Scenario A), the price dynamics support an increase in the GDP deflator of 0.008% or by 60% more than in Scenario A. Coupled with the increase in real or quantity terms, the value of EU GDP rises by €1.8 billion, substantially more than in Scenario A (€1.2 billion). With higher consumer prices (a rise of 0.006%) and the smaller terms of trade gains, economic welfare gains improve to €593 million, only marginally greater than the welfare gains in Scenario A (€543 million).

Overall, the EPA contributes to making the EU a more open economy with the EU's two-way global trade expanding by almost 0.03%. The ratio of real GDP gains to increases in trade volumes is about 0.08, which is on the low side compared to historical experience, which suggests that the estimated real economic gains in Scenario B are likely understated. By the same token, the price responses would also be overstated given that the supply response of the EU economy to the EPA shock would have been more positive. This conclusion is also supported by the relatively strong increase in real wages compared to productivity gains (a ratio of 4.74:1, where economic theory predicts a ratio of 1:1). In short, the gains estimated in the simulation of Scenario B are conservative estimates of the benefits of the EPA.

Table 13: Macroeconomic impacts on the EU27, 2022, Scenario B

SCENARIO B	EU27
Major Indicators	
Economic Welfare (€ millions)	593
GDP value change (€ millions)	1,800
GDP value change (%)	0.0106
GDP volume (% change)	0.0025
GDP deflator (% change)	0.0081
Terms of Trade (% change)	0.0010
CPI (% change)	0.0061
Real wage Unskilled labour (% change)	0.0117
Real wage skilled labour (% change)	0.0117
Volume of merchandise exports (% change)	0.0277
Volume of merchandise imports (% change)	0.0309
Key Ratios	
Real Wages/Productivity	4.74
Real GDP/Trade volume	0.08

Source: Simulations by the European Commission; and calculations by the study team.

The impacts on **the SADC EPA states** under Scenario B are set out in Table 14. The real GDP gain increases by about 50% larger at 0.044% (compared to 0.029% under Scenario A). The price impacts are also substantially stronger. Real wages rise by about 0.6% (compared to about 0.2% in Scenario A) while the terms of trade improve by 0.455% (compared to 0.058% in Scenario A). This supports a relatively steep increase in the GDP deflator of 0.463%. Coupled with the real GDP gain, this supports an increase in the value of GDP of €2.64 billion. While higher consumer prices reduce the welfare gains, these

nonetheless amount to €1.6 billion (some 4x larger compared to €452 million in Scenario A).

Overall, the EPA contributes to making the SADC region more open in economic terms as the region's two-way global trade expands by 3.4%. The ratio of real GDP gains to increases in trade volumes is about 0.01, which is very low compared to historical experience (a rule of thumb is that real GDP increases by about 0.2% for every 1% increase in the openness of an economy). As is the case with the EU, this suggests that the estimated real economic gains in Scenario B are understated. By the same token, the price responses would also be overstated as well given that the supply response of the SADC region to the EPA shock would have been more positive than described in the simulation. This conclusion is also supported by the very strong increase in real wages compared to productivity gains (a ratio of almost 14:1, where economic theory predicts a ratio of 1:1). In short, the simulations of Scenario B suggests that the EPA delivered significant economic benefits to the SADC region as a whole; there are sound reasons to believe that the estimated gains are quite conservative estimates of these benefits.

Table 14: Macroeconomic impacts on SADC partners, 2022, Scenario B

SCENARIO A	ZAF	MOZ	BWA	NAM	LSO	SWZ	SADC
Major Indicators							
Economic Welfare (€ millions)	1,507	-16	2	124	-4	-13	1,599
GDP value change (€ millions)	2,471	-30	-16	249	-6	-29	2,639
GDP value change (%)	0.544	-0.198	-0.054	1.757	-0.236	-0.564	0.507
GDP volume (% change)	0.042	0.103	0.006	0.087	0.183	0.092	0.044
GDP deflator (% change)	0.502	-0.301	-0.060	1.670	-0.420	-0.656	0.463
Terms of Trade (% change)	0.509	-0.088	-0.136	1.103	-0.526	-0.641	0.455
CPI (% change)	0.322	-0.156	-0.011	1.000	-0.165	-0.378	0.298
Real wage unskilled labour (% change)	0.701	0.223	-0.012	0.999	-0.040	-0.276	0.641
Real wage skilled labour (% change)	0.639	0.327	-0.025	0.302	-0.053	-0.368	0.570
Volume of merch. exports (% change)	3.280	0.329	0.204	0.419	0.103	-0.063	2.894
Volume of merch. imports (% change)	4.368	0.112	0.014	1.595	-0.495	-0.714	3.849
Key Ratios							
Real Wages/Productivity	16.04	2.68	-2.95	7.50	-0.25	-3.52	13.77
Real GDP/Trade volume	0.01	0.47	0.06	0.09	-0.94	-0.24	0.01

Source: Simulations by the European Commission; and calculations by the study team.

The SADC region impacts largely reflect the impacts of the EPA on South Africa under Scenario B. For the smaller members of SADC, the impacts vary considerably. All EPA states see an improvement in real GDP. Apart from Botswana, which realizes an increase in GDP in real terms of 0.006%, all the other smaller economies make stronger gains than South Africa, ranging from a high of 0.18% in Lesotho to 0.087% in Namibia, which is still double South Africa's gain.

Price impacts also vary sharply across the SADC EPA states. Generally, as in Scenario A, the individual economies experiencing terms of trade improvement realize economic welfare gains. In Scenario B only South Africa and Namibia see strong terms of trade gains and realize welfare gains of €1.5 billion and €124 million respectively. The other SADC EPA economies however see little in the way of welfare gains. Mozambique, Lesotho and Eswatini see the welfare gains implied by the real GDP gain fully offset by rising prices and falling terms of trade.

Other key impacts vary across the region. Real wages increase for both skilled and unskilled workers in three of the SADC EPA states (South Africa, Mozambique and Namibia) and decrease in the other three (Botswana, Eswatini and Lesotho). On balance, due to South Africa's economic weight, they increase for the SADC EPA region as a whole.

5.2. Sectoral impacts

As regards **sectoral impacts in the EU in Scenario B** (Table 15), as in Scenario A, by far the largest increase in bilateral exports for the EU under Scenario B is in motor vehicles and parts. Under the assumptions of this scenario, this sector experienced an increase of almost €3 billion in exports to SADC partners due to the EPA, almost double the gain in Scenario A. Many more EU sectors make strong export gains under Scenario B: in all 19 sectors realize bilateral export gains greater than €100 million, led by computer, electronic and optical products (€867 million), chemicals (€640 million), rubber and plastics (€579 million) and machinery and equipment (€524 million). While the leader board is dominated by manufacturing, the EU's agriculture and agri-foods sectors also make palpable gains under Scenario B, led by meat products (€241 million), wheat (€220 million), prepared foods (€219 million), and vegetable oils (€109 million). Two services sectors also experience substantial increases in bilateral exports: commercial services (€192 million) and trade services (€124 million).

Similarly, the majority of EU sectors see an increase in bilateral imports. By far the largest increase is in the motor vehicles and parts (an increase in imports of almost €3.6 billion). Other notable sectors seeing an increase in import penetration from SADC sources include, metal products (€833 million), chemicals (€501 million), prepared foods (€368 million), vegetables fruits and nuts (€324 million), sugar (€201 million), and beverages and tobacco products (€111 million). Trade services imports also rise by €122 million due to income gains in the EU and the increased flow of trade.

As in Scenario A, the impact on production in the EU does not line up neatly with bilateral export gains. The auto sector's strong bilateral export gains translate into an increase of only €63 million due to the significant import penetration in the EU domestic market. Sectors that consolidated bilateral export gains to achieve significant increases in total sales to domestic and export markets combined include rubber and plastics (€588 million), computer, electronic and optical products (€554 million) and chemicals (€331 million). In the agricultural sectors meat products (€246 million) and wheat (almost €200 million) also convert the export gains to SADC into gains in total shipments. However, the largest gains in total sales under Scenario B are in services sectors, including public services, where service supply expands by €791 million and commercial services, which build on the €184 million of bilateral exports to raise total sales by €719 million.

Several EU sectors that witness significant bilateral import penetration under Scenario B also experience an overall decline in total sales. These include metal products, which see total sales fall by €414 million due to erosion of market share in the EU; vegetables, fruits and nuts (a decline in total sales of €333 million, almost euro for euro with the increase in bilateral imports of €324 million), and sugar (€294 million decline in sales). Beverages and tobacco products and prepared foods see more modest declines in total sales (€64 million and €45 million) respectively despite relatively strong bilateral export gains. Several other EU sectors (notably other transport equipment, electrical equipment, and pharmaceuticals) experience a notable decline in total sales, although this cannot be attributed to import penetration; rather the declines reflect reallocation of expenditures within the EU.

Overall, under Scenario B, the EU experienced a gain in total sales across all sectors of €4.85 billion. This is much greater than the €2.7 billion realized under Scenario A. The sectors making the largest gains in value-added in percentage terms were wheat (an increase in value-added of 0.8%) apparel (0.21%), meat products (0.14%), rubber and plastics (0.13%), vegetable oils (0.13%), leather (0.13%) and textiles (0.12%). Of the declining sectors, the only one which was palpable in percentage terms was sugar, where value-added declined by 0.96%. As noted above, this was only partially attributable to increased import penetration. The only other sector with a notable percentage decline in value added was vegetables, fruit and nuts (-0.265%).

As regards the **sectoral impacts of the EPA on SADC EPA states under Scenario B** (Table 16), the leaderboard for sectors making bilateral export gains to the EU is familiar from Scenario A: motor vehicles and parts (€3.51 billion) is far and away the biggest export gainer, followed by metal products (€817 million) and chemicals (€474 million). Prepared foods (€342 million), vegetables, fruits and nuts (€275 million) and sugar (€189 million) also make large gains. Trade services exports to the EU of €122 million keep this sector amongst the leaders.

The impact of the EPA on SADC EPA state imports mirrors the impacts reported above for EU bilateral exports as described above.

The impact on production in the SADC EPA region is substantially greater than in the EU. The auto sector builds on its €3.51 billion gain in bilateral exports to expand total shipments by €3.6 billion, an increase of over 12%. The other leading sectors are services: public services expands by €1.72 billion; trade services by €1.06 billion and commercial services by €788 million. The main source of gains for these services sectors is from increased incomes due to the EPA effects as opposed to direct export gains. Altogether 16 sectors in the SADC EPA region achieve sales gains in excess of €100 million.

At the same time, despite the strong income gains within the SADC EPA region, several sectors that experience significant import penetration also experience declines in total sales. These include machinery and equipment (EU imports increase by €524 million and total sales by SADC EPA suppliers decline by €335 million); computer electronic and optical productions (impacts of €867 million and €301 million respectively), other manufacturing (€269 million and €289 million respectively), rubber and plastics (€579 million and €229 million respectively), paper and paper products (€164 and €196 million respectively), and meat products (€241 million and €147 million respectively).

Overall, the SADC EPA states experienced, under the assumptions of Scenario B, a gain in total sales across all sectors of €9.07 billion, of which €3.43 billion came from increased domestic shipments responding to the income gains generated by the EPA in the SADC EPA economies.

Table 23 to Table 28 in the annex provide the detailed sectoral impacts on the SADC EPA states under Scenario B.

Table 15: Sectoral impacts in the EU (€ millions) - Scenario B

EU27	EU Exports to SADC	EU Imports from SADC	EU Total Extra-EU Exports	EU Total Extra-EU Imports	Intra-EU Exports	Domestic Shipments	Total Shipments	Total Shipments % change	Share of Value Added	Value added % change	Unskilled labour % change	Skilled labour % change
1 Rice	0.0	0.0	-0.3	0.7	-0.2	-0.2	-0.7	-0.01	0.023	-0.005	-0.005	-0.005
2 Wheat	220.2	0.0	182.6	8.6	-0.1	17.1	199.6	0.69	0.138	0.784	0.661	0.661
3 Other Grains	0.3	1.3	-0.2	1.9	-0.5	3.4	2.8	0.01	0.118	0.013	0.017	0.017
4 Vegetables, fruit, nuts	9.3	324.3	-65.6	236.3	-151.9	-106.7	-324.2	-0.24	0.781	-0.265	-0.223	-0.223
5 Oil Seeds	3.4	-0.3	2.2	12.8	5.5	29.9	37.6	0.07	0.226	0.082	0.075	0.075
6 Sugar	0.5	200.6	-48.5	156.3	-96.9	-148.5	-293.9	-0.99	0.069	-0.961	-0.957	-0.957
7 Fibres crops	0.0	0.0	-0.6	0.2	0.0	0.4	-0.2	-0.01	0.027	-0.015	-0.003	-0.003
8 Other Crops	6.1	3.2	1.0	10.3	-7.5	-3.7	-10.2	-0.02	0.157	-0.028	-0.018	-0.017
9 Cattle	0.8	6.4	-1.5	8.9	7.0	78.1	83.7	0.06	0.531	0.075	0.069	0.069
10 Other primary	0.1	6.3	-0.1	2.6	-0.9	14.2	13.3	0.02	0.402	0.022	0.024	0.024
11 Forestry	0.0	-0.1	-0.9	1.5	0.6	14.1	13.8	0.02	0.254	0.024	0.026	0.026
12 Fishing	0.4	5.8	0.3	4.8	-2.0	-0.3	-2.0	-0.01	0.102	-0.008	0.002	0.003
13 Coal	0.0	-12.0	0.2	3.7	0.4	-4.8	-4.2	-0.02	0.084	-0.013	-0.027	-0.025
14 Oil	0.0	0.0	-0.1	20.7	-0.6	-4.2	-5.0	-0.03	0.102	-0.030	-0.019	-0.019
15 Gas	0.0	-0.2	-0.4	37.8	-4.1	-22.2	-26.6	-0.08	0.164	-0.084	-0.075	-0.075
16 Oil products	6.2	2.3	3.1	16.1	2.0	33.9	39.0	0.01	0.081	0.021	0.004	0.004
17 Electricity	1.6	-0.4	-0.5	5.8	0.5	76.2	76.2	0.02	1.483	0.019	0.021	0.021
18 Minerals	1.8	-9.1	9.3	10.0	4.3	20.6	34.2	0.03	0.455	0.029	0.030	0.030
19 Cement	145.8	10.4	125.4	23.7	-0.7	35.4	160.0	0.05	0.595	0.057	0.056	0.056
20 Ruminant meat	9.1	9.4	1.4	10.2	-4.4	3.7	0.7	0.00	0.115	0.010	0.010	0.010
21 Other Meat	241.1	7.4	227.8	8.3	-1.5	19.3	245.6	0.13	0.234	0.143	0.143	0.143
22 Vegetable Oils	108.9	4.1	102.2	13.0	-6.3	0.1	96.0	0.12	0.068	0.133	0.133	0.133
23 Dairy products	38.5	0.1	27.1	2.7	2.8	24.8	54.7	0.02	0.262	0.033	0.032	0.032
24 Other prepared Food	218.9	368.1	182.2	314.4	-161.7	-65.4	-44.9	-0.01	1.220	0.007	0.006	0.007
25 Beverages, tobacco products	29.9	110.6	3.2	96.5	-46.2	-21.3	-64.3	-0.02	0.617	-0.009	-0.009	-0.009
26 Textiles	175.1	31.0	147.5	74.0	0.2	66.2	213.9	0.11	0.335	0.117	0.117	0.117
27 Wearing	294.7	3.0	262.2	80.1	-25.1	2.6	239.7	0.15	0.266	0.157	0.157	0.157
28 Leather	171.5	32.4	141.1	62.2	-18.1	7.5	130.6	0.12	0.187	0.129	0.129	0.129
29 Wood and products	34.5	2.3	22.0	12.9	0.0	17.5	39.6	0.02	0.283	0.028	0.028	0.028
30 Paper & Paper Products	163.8	-1.2	141.5	13.9	21.0	73.2	235.6	0.05	1.035	0.054	0.053	0.053
31 Chemicals	639.9	500.8	506.6	477.8	-201.3	25.7	330.9	0.04	1.523	0.044	0.041	0.041
32 Pharmaceuticals	23.2	1.5	-72.3	41.1	-40.6	-2.3	-115.2	-0.03	1.243	-0.019	-0.020	-0.020
33 Rubber and plastics products	578.5	23.9	529.3	66.1	7.1	51.6	588.0	0.12	0.978	0.133	0.133	0.133
34 Iron & Steel	122.8	-1.4	101.9	29.6	-6.7	12.9	108.1	0.02	0.548	0.026	0.026	0.026
35 Metal products	468.1	832.9	195.2	704.2	-493.8	-115.2	-413.7	-0.04	1.793	-0.034	-0.034	-0.034
36 Computer, electronic, optical products	866.9	26.4	600.7	249.3	-66.2	19.3	553.8	0.07	1.324	0.081	0.081	0.081
37 Electrical equipment	95.2	7.4	-57.7	99.1	-57.3	-17.6	-132.6	-0.02	1.101	-0.017	-0.017	-0.017
38 Machinery and equipment	523.9	53.8	262.8	142.9	-60.1	-3.3	199.4	0.02	2.092	0.028	0.028	0.027
39 Motor vehicles and parts	2,983.2	3,589.7	2,620.9	2,829.7	-2,238.4	-319.5	62.9	0.01	1.318	0.029	0.029	0.029
40 Other transport equipment	1.5	15.9	-95.6	42.1	-43.2	-30.6	-169.4	-0.06	0.463	-0.050	-0.050	-0.050
41 Other Manufacturing	268.7	34.5	226.0	84.0	-29.6	4.6	201.0	0.04	1.010	0.050	0.050	0.050
42 Construction	4.3	0.7	-3.3	4.4	-0.1	257.5	254.1	0.01	4.874	0.016	0.018	0.017
43 Trade services	123.8	122.1	9.9	159.6	-67.0	476.4	419.3	0.01	14.286	0.015	0.015	0.016
44 Land Transport	1.1	-1.8	-4.3	5.6	2.0	131.9	129.6	0.01	2.718	0.012	0.015	0.015
45 Water Transport	-0.1	-0.3	-2.4	12.6	-0.3	3.5	0.7	0.00	0.554	0.046	0.050	0.049
46 Air Transport	8.8	-6.9	-5.9	8.0	1.0	10.5	5.6	0.00	0.266	0.022	0.026	0.026
47 Commercial services	191.8	72.1	43.5	202.1	-27.3	702.6	718.8	0.01	23.380	0.014	0.014	0.014
48 Finance services	61.9	18.7	25.1	50.3	-7.4	160.8	178.5	0.01	4.680	0.015	0.014	0.014
49 Public services	2.7	-3.0	-24.4	10.3	-1.1	816.0	790.5	0.01	25.435	0.016	0.015	0.016
Total	8,848.7	6,397.9	6,319.6	6,469.2	-3,814.9	2,345.0	4,849.6	0.01	100	0.017	0.018	0.018

Source: Simulations by the European Commission; and calculations by the study team. Note: the data for labour represent the total expenditure in the sector for labour = employment times wages.

Table 16: Sectoral impacts in the SADC EPA states (€ millions) - Scenario B

SADC	SADC EPA Exports to EU27	SADC EPA Imports from EU27	SADC EPA Total Exports	SADC EPA Total Imports	Memo: SADC EPA Exports to SADC EPA	Domestic Shipments	Total Shipments	Total Shipments % change	Share of Value Added	Value added % change	Unskilled labour % change	Skilled labour % change
1 Rice	0.0	0.0	-0.8	9.9	-0.4	-4.9	-5.7	-0.21	0.100	0.084	0.071	0.043
2 Wheat	0.0	220.2	-6.0	44.4	-6.6	-37.8	-43.8	-4.86	0.101	-3.189	-0.190	0.897
3 Other Grains	1.2	0.3	-0.7	2.6	0.8	27.5	26.7	0.77	0.315	0.974	0.624	0.886
4 Vegetables, fruit, nuts	275.1	9.3	375.0	13.5	1.5	31.3	406.3	3.58	1.237	3.173	0.761	1.677
5 Oil Seeds	-0.3	3.4	-0.5	2.8	-0.2	3.1	2.5	0.18	0.118	0.322	0.183	0.177
6 Sugar	188.8	0.5	312.6	15.1	7.1	62.4	375.1	4.77	0.256	3.580	3.640	5.027
7 Fibres crops	0.0	0.0	-1.3	0.2	0.0	-0.1	-1.3	-0.75	0.026	-0.729	0.065	-0.189
8 Other Crops	2.9	6.1	2.6	2.5	0.5	-0.3	2.3	0.72	0.046	0.769	0.066	-0.013
9 Cattle	6.0	0.8	11.8	14.3	7.5	256.8	268.6	1.87	1.233	2.141	1.582	1.926
10 Other primary	6.1	0.1	-1.9	0.1	0.0	-19.7	-21.6	-0.51	0.297	-0.257	0.155	0.128
11 Forestry	-0.1	0.0	0.4	-0.1	0.0	-7.2	-6.7	-0.24	0.213	0.232	0.530	0.167
12 Fishing	5.0	0.4	4.1	0.5	0.0	52.7	56.8	1.71	0.338	2.137	3.213	0.524
13 Coal	-10.7	0.0	-117.0	1.8	1.0	62.8	-54.2	-0.25	2.071	-0.145	0.028	0.160
14 Oil	0.0	0.0	0.0	6.2	0.0	-0.4	-0.5	-0.55	0.009	-0.642	0.166	0.296
15 Gas	-0.2	0.0	19.8	25.4	20.8	-18.8	1.0	0.06	0.155	1.190	0.125	0.094
16 Oil products	2.2	6.2	-13.2	42.1	-1.0	76.9	63.7	0.33	0.234	0.843	0.048	0.054
17 Electricity	-0.4	1.6	-3.1	16.1	8.8	250.9	247.8	0.55	3.729	0.650	0.089	0.092
18 Minerals	-8.7	1.8	-86.3	46.3	13.0	552.8	466.5	0.60	6.872	0.778	0.018	-0.001
19 Cement	9.6	145.8	1.7	105.9	-2.6	-58.8	-57.2	-0.70	0.414	-0.369	0.075	0.082
20 Ruminant meat	9.2	9.1	15.2	8.3	-3.2	20.4	35.6	0.82	0.137	1.246	0.773	0.473
21 Other Meat	7.1	241.1	-14.7	146.4	-21.8	-132.6	-147.3	-2.61	0.229	-2.225	-0.217	-0.138
22 Vegetable Oils	3.9	108.9	-2.0	77.3	-1.7	13.5	11.5	0.08	0.704	0.469	0.283	0.288
23 Dairy products	0.1	38.5	1.2	18.5	-1.0	-12.0	-10.8	-0.73	0.049	0.214	0.857	1.190
24 Other prepared Food	341.7	218.9	318.2	102.3	-40.8	-37.0	281.3	3.68	0.670	3.561	1.306	0.964
25 Beverages, tobacco products	106.1	29.9	142.3	38.2	-3.5	46.2	188.5	1.28	0.994	1.905	0.581	0.555
26 Textiles	29.1	175.1	19.1	89.6	-10.4	-78.3	-59.3	-1.07	0.298	-0.266	-0.311	-0.290
27 Wearing	2.9	294.7	-31.4	136.9	-36.3	-93.1	-124.5	-2.50	0.272	-1.935	-2.757	-2.756
28 Leather	31.5	171.5	24.6	75.9	-4.9	-25.2	-0.6	-0.04	0.051	0.366	-1.139	-1.207
29 Wood and products	2.0	34.5	-5.0	24.9	-4.3	-8.0	-13.0	-0.36	0.201	0.016	0.198	0.197
30 Paper & Paper Products	-1.1	163.8	-45.3	125.9	-11.7	-150.7	-196.0	-1.36	1.025	-0.895	-0.271	-0.215
31 Chemicals	474.4	639.9	367.8	355.2	-36.3	-240.1	127.7	0.56	1.323	0.873	-0.022	-0.016
32 Pharmaceuticals	1.5	23.2	-10.3	35.2	-0.3	-8.7	-18.9	-0.51	0.207	0.025	0.069	0.078
33 Rubber and plastics products	22.3	578.5	2.6	329.3	-14.8	-231.4	-228.8	-2.79	0.344	-2.201	-0.784	-0.768
34 Iron & Steel	-1.4	122.8	-163.4	119.7	-4.8	118.9	-44.4	-0.26	0.307	-0.013	-0.012	0.003
35 Metal products	817.0	468.1	654.7	308.8	-47.9	-133.1	521.6	1.04	1.209	1.488	-0.113	-0.173
36 Computer, electronic, optical products	25.9	866.9	-10.3	315.6	-32.7	-291.4	-301.7	-2.96	0.599	-2.100	0.255	0.272
37 Electrical equipment	7.1	95.2	-34.9	93.7	-18.0	-41.3	-76.2	-0.83	0.301	-0.291	-0.190	-0.170
38 Machinery and equipment	51.8	523.9	-57.3	352.9	-30.3	-277.4	-334.7	-2.20	0.201	-1.685	-0.428	-0.365
39 Motor vehicles and parts	3,509.9	2,983.2	4,074.6	1,813.0	-24.1	-465.9	3608.7	12.09	0.966	14.155	2.413	2.465
40 Other transport equipment	15.7	1.5	-29.2	-1.3	0.9	3.1	-26.1	-0.77	0.152	1.142	-0.341	0.340
41 Other Manufacturing	33.7	268.7	-158.4	154.5	-13.4	-130.3	-288.7	-2.18	0.403	-1.719	-0.283	-0.280
42 Construction	0.7	4.3	-0.4	3.2	0.0	262.2	261.8	0.50	2.965	0.775	0.196	0.175
43 Trade services	122.1	123.8	61.6	132.7	-2.7	997.2	1058.8	0.89	12.428	1.027	0.309	0.279
44 Land Transport	-1.8	1.1	-6.5	4.4	0.0	199.3	192.7	0.61	2.323	0.848	0.225	0.200
45 Water Transport	-0.3	-0.1	-0.8	-0.1	0.0	3.4	2.6	0.19	0.205	0.449	0.175	0.140
46 Air Transport	-6.9	8.8	-28.5	26.9	-0.5	37.5	9.1	0.09	0.343	0.287	0.108	0.057
47 Commercial services	72.1	191.8	74.8	178.7	-2.4	713.7	788.5	0.40	15.105	0.611	0.115	0.127
48 Finance services	18.7	61.9	8.0	72.9	-3.0	406.5	414.5	0.66	6.452	0.798	0.140	0.153
49 Public services	-3.0	2.7	-17.6	15.4	-0.1	1733.4	1715.9	0.66	31.773	0.862	0.298	0.162
Total	6,168.4	8,848.7	5,646.0	5,504.3	-319.7	3427.8	9073.8	0.74	100	0.914	0.2441	0.1779

Source: Simulations by the European Commission; and calculations by the study team. Note: the data for labour represent the total expenditure in the sector for labour = employment times wages.

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ANNEX

Table 17: Sectoral impacts in Botswana (€ millions) - Scenario A

Sector	BWA Exports to EU	BWA Imports from EU	BWA Total Exports	BWA Total Imports	Memo: BWA Exports to SADC	Domestic Shipments	Total Shipments	Total Shipments % change	Share of Value Added	Value Added % change	Unskilled labour % change	Skilled labour % change
1 Rice	0.00	0.00	0.00	0.08	0.00	0.01	0.01	0.25	0.00	0.24	0.25	0.25
2 Wheat	0.00	0.07	0.00	0.05	0.00	0.04	0.04	0.18	0.07	0.19	0.19	0.18
3 Other Grains	0.00	0.00	0.01	0.16	0.01	0.03	0.04	0.31	0.02	0.32	0.30	0.29
4 Vegetables, fruit, nuts	0.00	0.00	0.01	0.07	0.01	0.49	0.50	0.20	0.73	0.21	0.20	0.19
5 Oil Seeds	0.00	0.00	0.00	0.02	0.00	0.00	0.00	0.13	0.00	0.15	0.15	0.15
6 Sugar	0.00	0.00	0.00	0.20	0.00	0.05	0.05	0.52	0.01	0.53	0.52	0.51
7 Fibres crops	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.04	0.01	0.06	0.07	0.06
8 Other Crops	0.00	0.00	0.00	0.10	0.00	0.00	0.01	1.02	0.00	1.14	1.02	1.01
9 Cattle	0.00	0.00	0.15	0.09	0.15	4.08	4.22	0.82	1.28	0.86	0.77	0.76
10 Other primary	0.00	0.00	0.00	0.00	0.00	0.12	0.12	0.21	0.14	0.22	0.21	0.20
11 Forestry	0.00	0.00	0.00	0.01	0.00	0.04	0.04	0.10	0.14	0.11	0.12	0.11
12 Fishing	0.00	0.00	0.00	0.00	0.00	0.01	0.01	0.18	0.02	0.20	0.19	0.18
13 Coal	0.00	0.00	-0.28	0.00	-0.26	0.13	-0.15	-0.05	0.95	-0.02	-0.06	-0.03
14 Oil	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.07	0.00	0.07	0.09	0.08
15 Gas	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.11	0.00	0.11	0.13	0.12
16 Oil products	0.00	0.00	0.00	0.58	0.00	0.00	0.00	0.08	0.01	0.11	0.11	0.11
17 Electricity	0.00	0.01	0.00	0.20	0.00	0.76	0.76	0.12	0.41	0.12	0.15	0.16
18 Minerals	1.12	0.43	-0.42	3.94	0.30	1.05	0.63	0.01	19.08	-0.01	0.02	0.01
19 Cement	0.00	0.03	-0.01	0.30	0.00	0.39	0.38	0.07	0.41	0.08	0.07	0.08
20 Ruminant meat	1.12	0.00	4.17	-0.03	0.04	0.56	4.73	1.91	0.19	1.86	1.86	1.86
21 Other Meat	0.00	0.00	0.00	-0.52	0.00	1.15	1.15	0.59	0.11	0.53	0.52	0.53
22 Vegetable Oils	0.00	0.00	0.00	0.14	0.00	0.06	0.06	0.33	0.00	0.34	0.34	0.34
23 Dairy products	0.00	0.00	0.00	0.11	0.00	0.12	0.12	0.12	0.17	0.12	0.12	0.12
24 Other prepared Food	0.00	0.00	0.02	0.70	0.02	1.57	1.59	0.30	0.55	0.28	0.28	0.28
25 Beverages, tobacco products	0.00	0.00	0.00	0.22	0.00	0.54	0.54	0.15	0.54	0.15	0.14	0.14
26 Textiles	0.00	0.02	-0.12	-1.42	-0.12	-0.25	-0.37	-1.86	0.01	-1.79	-1.79	-1.78
27 Wearing	0.02	15.59	-0.03	3.34	-0.05	-2.94	-2.97	-2.44	0.11	-2.33	-2.34	-2.33
28 Leather	0.00	2.82	0.00	0.32	0.00	-0.14	-0.15	-0.79	0.02	-0.66	-0.66	-0.66
29 Wood and products	0.00	0.00	0.00	0.10	0.00	0.05	0.05	0.10	0.06	0.11	0.11	0.12
30 Paper & Paper Products	0.00	0.04	-0.03	0.10	-0.02	0.17	0.14	0.05	0.46	0.07	0.06	0.06
31 Chemicals	0.01	0.04	-0.02	0.16	-0.03	0.05	0.02	0.02	0.20	0.03	0.03	0.03
32 Pharmaceuticals	0.00	0.15	0.00	0.18	0.01	0.01	0.01	0.04	0.04	0.05	0.05	0.05
33 Rubber and plastics products	0.00	0.80	-0.24	0.21	-0.23	-0.09	-0.33	-0.54	0.13	-0.53	-0.53	-0.53
34 Iron & Steel	0.00	0.01	0.00	0.12	0.01	0.13	0.13	0.10	0.12	0.11	0.10	0.11
35 Metal products	0.00	0.05	-0.06	0.23	-0.01	0.18	0.12	0.04	0.35	0.06	0.06	0.06
36 Computer, electronic, optical products	0.01	-0.05	0.01	0.10	0.00	-0.06	-0.05	-0.11	0.08	-0.06	-0.06	-0.06
37 Electrical equipment	0.00	3.12	-0.03	0.21	-0.03	-0.09	-0.12	-0.37	0.06	-0.33	-0.33	-0.33
38 Machinery and equipment	0.00	0.33	-0.03	0.42	-0.03	0.06	0.03	0.04	0.13	0.06	0.06	0.06
39 Motor vehicles and parts	0.00	1.16	-0.25	-0.86	-0.27	-1.62	-1.88	-1.72	0.15	-1.48	-1.49	-1.48
40 Other transport equipment	0.00	-0.07	0.00	-0.01	0.00	-0.11	-0.12	-0.30	0.04	-0.25	-0.25	-0.25
41 Other Manufacturing	3.92	0.10	3.50	0.64	0.00	-0.13	3.37	2.41	0.14	2.33	2.32	2.32
42 Construction	0.00	0.02	0.00	0.02	0.00	6.13	6.12	0.08	13.75	0.09	0.12	0.10
43 Trade services	5.53	0.95	6.23	0.54	-0.13	4.00	10.24	0.18	13.31	0.20	0.22	0.21
44 Land Transport	0.00	0.00	0.00	0.00	0.00	0.70	0.70	0.09	1.07	0.10	0.12	0.11
45 Water Transport	0.00	0.00	0.00	0.00	0.00	0.01	0.00	0.04	0.00	0.08	0.11	0.10
46 Air Transport	0.00	0.02	0.00	0.03	0.00	0.01	0.01	0.02	0.06	0.09	0.10	0.09
47 Commercial services	0.02	2.90	0.01	2.88	0.00	-3.92	-3.91	-0.09	10.67	-0.05	-0.05	-0.05
48 Finance services	0.01	0.01	0.00	0.01	0.00	1.42	1.42	0.06	5.18	0.11	0.10	0.10
49 Public services	0.00	0.00	-0.01	0.02	0.00	9.29	9.28	0.08	28.97	0.10	0.10	0.10
Total	11.77	28.59	12.57	13.77	-0.67	24.04	36.62	0.08	100.00	0.09	0.10	0.09

Source: Simulations by the European Commission; and calculations by the study team. Note: the data for labour represent the total expenditure in the sector for labour = employment times wages.

Table 18: Sectoral impacts in Eswatini (€ millions) - Scenario A

Sector	SWZ Exports to EU	SWZ Imports from EU	SWZ Total Exports	SWZ Total Imports	Memo: SWZ Exports to SADC	Domestic Shipments	Total Shipments	Total Shipments % change	Share of Value Added	Value Added % change	Unskilled labour % change	Skilled labour % change
1 Rice	0.00	0.00	0.00	-0.12	0.00	0.09	0.09	0.09	1.12	0.12	0.13	0.13
2 Wheat	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.50	0.00	0.56	0.34	0.30
3 Other Grains	0.00	0.00	0.00	0.01	0.00	0.02	0.02	0.07	0.29	0.10	-0.03	-0.08
4 Vegetables, fruit, nuts	0.00	0.00	0.03	0.07	0.03	-0.01	0.02	0.02	1.35	0.03	-0.10	-0.14
5 Oil Seeds	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.11	0.02	0.15	0.01	-0.03
6 Sugar	-1.08	0.00	1.31	-0.01	2.62	2.08	3.39	0.26	7.31	0.27	0.13	0.09
7 Fibres crops	0.00	0.00	0.03	0.00	0.00	0.00	0.03	0.26	0.06	0.38	0.20	0.16
8 Other Crops	0.00	0.00	0.00	0.01	0.00	0.01	0.01	0.39	0.04	0.43	0.25	0.20
9 Cattle	0.00	0.00	0.02	0.00	0.02	-0.01	0.02	0.01	2.26	-0.01	-0.13	-0.18
10 Other primary	0.00	0.00	0.00	0.00	0.00	0.03	0.03	0.08	0.22	0.10	-0.04	-0.08
11 Forestry	0.00	0.00	0.07	0.02	0.07	0.16	0.23	0.41	0.86	0.42	0.25	0.20
12 Fishing	0.00	0.00	0.00	0.00	0.00	-0.01	-0.01	-0.04	0.19	-0.03	-0.17	-0.21
13 Coal	0.00	0.00	0.12	0.00	0.10	0.01	0.13	0.73	0.08	0.75	1.07	1.24
14 Oil	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.31	0.01	0.45	0.27	0.23
15 Gas	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-0.03	0.02	-0.02	-0.18	-0.23
16 Oil products	0.00	0.00	0.00	0.03	0.00	0.01	0.01	0.25	0.04	0.29	0.31	0.33
17 Electricity	0.00	0.00	0.00	-0.08	0.00	0.26	0.26	0.37	0.61	0.40	0.43	0.44
18 Minerals	0.00	0.00	0.01	0.00	0.00	-0.02	-0.01	-0.02	0.81	0.03	-0.10	-0.15
19 Cement	0.00	0.02	0.01	-0.04	0.01	0.03	0.05	0.23	0.20	0.24	0.28	0.29
20 Ruminant meat	0.00	0.00	0.02	-0.06	-0.01	0.03	0.05	0.15	0.23	0.17	0.19	0.20
21 Other Meat	0.00	0.00	-0.01	-0.06	-0.02	-0.06	-0.07	-0.07	0.85	-0.10	-0.09	-0.08
22 Vegetable Oils	0.00	0.00	0.00	-0.10	0.00	0.06	0.07	0.10	0.47	0.14	0.17	0.17
23 Dairy products	0.00	0.01	0.00	-0.04	0.00	0.06	0.06	0.19	0.11	0.18	0.20	0.21
24 Other prepared Food	0.00	0.01	0.78	0.31	0.76	0.09	0.88	0.32	2.34	0.26	0.28	0.29
25 Beverages, tobacco products	0.00	0.01	-0.06	0.01	-0.08	0.01	-0.05	-0.06	1.26	-0.04	-0.02	-0.01
26 Textiles	0.00	0.18	-0.71	-2.04	-0.72	-3.94	-4.66	-1.78	3.17	-1.78	-1.76	-1.74
27 Wearing	0.00	0.14	-18.13	-0.30	-18.18	-0.17	-18.31	-6.19	3.25	-6.17	-6.15	-6.13
28 Leather	0.00	0.09	0.00	-0.12	0.00	-0.02	-0.03	-0.24	0.19	-0.24	-0.20	-0.19
29 Wood and products	0.00	0.01	0.41	-0.03	0.41	0.09	0.50	0.56	0.78	0.53	0.57	0.58
30 Paper & Paper Products	0.00	0.00	-0.16	-0.07	-0.17	0.14	-0.02	-0.04	0.62	-0.04	-0.01	0.00
31 Chemicals	0.15	0.10	8.40	0.02	4.58	0.30	8.70	0.67	17.85	0.71	0.74	0.75
32 Pharmaceuticals	0.00	0.00	0.16	-0.14	0.01	0.09	0.25	0.34	1.16	0.37	0.40	0.41
33 Rubber and plastics products	0.00	0.09	-0.11	-0.07	-0.11	0.10	-0.01	-0.02	0.70	-0.02	0.02	0.04
34 Iron & Steel	0.00	0.00	0.01	-0.01	0.01	0.06	0.07	0.43	0.09	0.49	0.52	0.53
35 Metal products	0.01	0.00	0.20	0.02	0.01	0.08	0.28	0.73	0.38	0.78	0.82	0.83
36 Computer, electronic, optical products	0.00	-0.01	0.04	-0.01	0.00	0.01	0.05	0.33	0.27	0.32	0.37	0.38
37 Electrical equipment	0.00	0.00	0.02	-0.03	0.00	0.08	0.10	0.30	0.41	0.32	0.36	0.38
38 Machinery and equipment	0.00	0.03	0.05	0.05	0.00	0.04	0.09	0.35	0.45	0.35	0.39	0.40
39 Motor vehicles and parts	0.00	0.33	-0.18	-0.40	-0.19	-0.09	-0.27	-3.28	0.14	-3.28	-3.24	-3.22
40 Other transport equipment	0.00	0.00	0.01	0.00	0.00	-0.01	0.00	-0.04	0.06	-0.04	-0.01	0.00
41 Other Manufacturing	0.00	0.02	0.04	0.00	0.01	0.02	0.06	0.22	0.38	0.22	0.27	0.28
42 Construction	0.00	0.01	0.00	0.00	0.00	-0.01	-0.01	0.00	1.05	-0.02	-0.19	-0.24
43 Trade services	0.01	0.03	-0.04	-0.06	-0.05	-0.86	-0.90	-0.09	13.47	-0.05	-0.23	-0.29
44 Land Transport	0.00	0.00	0.00	-0.02	0.00	-0.15	-0.15	-0.07	2.33	-0.07	-0.26	-0.32
45 Water Transport	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.08	0.02	0.10	-0.11	-0.17
46 Air Transport	0.00	0.00	0.00	0.00	0.00	-0.01	0.00	-0.01	0.09	-0.01	-0.18	-0.23
47 Commercial services	3.92	2.11	4.81	0.13	-0.23	-1.53	3.28	0.44	9.01	0.49	0.51	0.52
48 Finance services	0.01	4.67	0.02	0.17	0.00	-1.57	-1.55	-0.35	6.66	-0.31	-0.27	-0.25
49 Public services	0.00	0.00	0.01	-0.02	0.00	-2.20	-2.19	-0.14	16.72	-0.15	-0.14	-0.13
Total	3.03	7.87	-2.81	-2.96	-11.14	-6.72	-9.53	-0.10	100.00	-0.09	-0.23	-0.28

Source: Simulations by the European Commission; and calculations by the study team. Note: the data for labour represent the total expenditure in the sector for labour = employment times wages.

Table 19: Sectoral impacts in Lesotho (€ millions) - Scenario A

Sector	LSO Exports to EU	LSO Imports from EU	LSO Total Exports	LSO Total Imports	Memo: Intra LSO Exports to SADC	Domestic Shipments	Total Shipments	Total Shipments % change	Share of Value Added	Value Added % change	Unskilled labour % change	Skilled labour % change
1 Rice	0.00	0.00	0.00	-0.01	0.00	0.05	0.05	0.12	1.00	0.11	0.11	0.11
2 Wheat	0.00	0.02	0.00	0.02	0.00	0.00	0.00	0.43	0.00	0.43	0.37	0.34
3 Other Grains	0.00	0.00	0.00	0.03	0.00	0.02	0.02	0.12	0.33	0.11	0.10	0.08
4 Vegetables, fruit, nuts	0.00	0.00	0.00	0.06	0.00	0.05	0.05	0.11	1.21	0.10	0.08	0.06
5 Oil Seeds	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.25	0.02	0.25	0.21	0.19
6 Sugar	0.00	0.00	0.00	-0.04	0.00	0.31	0.31	0.14	2.20	0.11	0.10	0.08
7 Fibres crops	0.00	0.00	0.01	0.04	0.01	0.00	0.02	0.59	0.03	0.67	0.57	0.55
8 Other Crops	0.00	0.00	0.00	0.03	0.00	0.00	0.01	0.21	0.09	0.21	0.18	0.16
9 Cattle	0.00	0.00	0.07	0.01	0.07	0.11	0.18	0.22	1.54	0.15	0.13	0.11
10 Other primary	0.00	0.00	-0.11	0.00	-0.01	-0.40	-0.51	-0.38	0.12	-0.58	-0.52	-0.54
11 Forestry	0.00	0.00	0.00	0.00	0.00	0.01	0.01	0.09	0.35	0.08	0.06	0.04
12 Fishing	0.00	0.00	0.00	0.00	0.00	0.01	0.01	0.10	0.26	0.10	0.09	0.06
13 Coal	0.00	0.00	0.00	0.08	0.00	0.01	0.01	0.25	0.03	0.22	0.23	0.31
14 Oil	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.09	0.03	0.09	0.08	0.06
15 Gas	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.03	0.03	-0.01	-0.03
16 Oil products	0.00	0.00	0.00	0.11	0.00	0.01	0.01	0.09	0.19	0.08	0.08	0.09
17 Electricity	0.00	0.00	0.00	-0.02	0.00	0.00	0.00	0.00	1.15	-0.01	0.00	0.01
18 Minerals	0.06	0.00	0.07	0.00	0.01	0.01	0.08	0.02	11.45	0.01	0.00	-0.03
19 Cement	0.00	0.00	0.00	0.04	0.00	0.00	0.00	0.02	0.00	0.05	0.05	0.05
20 Ruminant meat	0.00	0.00	0.00	-0.01	0.00	0.04	0.04	0.27	0.16	0.18	0.19	0.19
21 Other Meat	0.00	0.00	-0.01	0.00	-0.01	0.17	0.16	0.26	0.58	0.15	0.15	0.16
22 Vegetable Oils	0.00	0.00	0.00	0.00	0.00	0.06	0.06	0.20	0.41	0.17	0.18	0.18
23 Dairy products	0.00	0.00	0.00	0.04	0.00	0.02	0.02	0.14	0.07	0.06	0.07	0.07
24 Other prepared Food	0.00	0.00	0.07	0.40	0.08	0.11	0.18	0.21	0.81	0.11	0.11	0.12
25 Beverages, tobacco products	0.00	0.00	0.00	0.15	0.00	0.04	0.04	0.16	0.34	0.14	0.17	0.17
26 Textiles	0.00	0.08	2.67	-3.80	2.43	0.53	3.20	0.99	6.39	1.70	1.70	1.71
27 Wearing	0.12	23.42	-5.86	-0.35	-11.15	-3.62	-9.48	-1.52	10.27	-1.32	-1.31	-1.30
28 Leather	0.00	0.08	-0.27	-0.03	-0.27	0.01	-0.25	-1.91	0.43	-1.86	-1.85	-1.85
29 Wood and products	0.00	0.00	0.00	-0.01	0.00	0.03	0.03	0.10	0.43	0.09	0.10	0.11
30 Paper & Paper Products	0.00	0.00	-0.12	0.01	-0.12	0.04	-0.08	-0.24	0.63	-0.25	-0.24	-0.23
31 Chemicals	0.00	0.00	0.00	0.08	0.00	0.06	0.06	0.10	0.84	0.09	0.12	0.13
32 Pharmaceuticals	0.00	0.01	0.00	0.01	0.00	0.02	0.02	0.05	0.89	0.05	0.06	0.06
33 Rubber and plastics products	0.00	0.01	-0.02	0.04	-0.02	0.02	0.00	0.00	0.42	-0.01	0.01	0.02
34 Iron & Steel	0.00	0.00	0.00	0.10	0.00	0.00	0.01	0.08	0.00	0.12	0.12	0.12
35 Metal products	0.00	0.00	0.00	0.06	0.00	0.01	0.01	0.06	0.07	0.03	0.08	0.09
36 Computer, electronic, optical products	0.00	0.00	-0.01	-0.01	-0.01	-0.01	-0.02	-0.12	0.57	-0.12	-0.11	-0.10
37 Electrical equipment	0.00	0.00	-0.04	0.00	-0.03	0.03	-0.01	-0.03	1.04	-0.03	-0.02	-0.01
38 Machinery and equipment	0.00	0.03	-0.02	0.02	-0.02	0.01	0.00	-0.03	0.28	-0.04	-0.02	-0.01
39 Motor vehicles and parts	0.00	0.20	-0.13	-0.37	-0.13	-0.08	-0.20	-3.91	0.17	-3.90	-3.89	-3.88
40 Other transport equipment	0.00	0.00	-0.02	0.00	-0.02	-0.01	-0.03	-0.68	0.15	-0.69	-0.68	-0.67
41 Other Manufacturing	0.00	0.00	-0.01	0.03	-0.01	0.01	0.00	-0.02	0.41	-0.03	0.00	0.01
42 Construction	0.00	0.00	0.00	0.00	0.00	0.07	0.07	0.04	0.55	-0.02	-0.05	-0.08
43 Trade services	0.17	0.00	0.17	-0.02	0.00	0.21	0.38	0.08	12.71	0.12	0.08	0.05
44 Land Transport	0.00	0.00	0.00	0.00	0.00	0.06	0.06	0.04	2.20	0.04	0.00	-0.03
45 Water Transport	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.02	0.02	-0.03	-0.06
46 Air Transport	0.00	0.00	-0.06	0.01	0.00	0.00	-0.06	-0.06	1.28	-0.07	-0.10	-0.13
47 Commercial services	0.90	0.28	0.85	0.10	-0.06	0.12	0.97	0.21	10.95	0.21	0.21	0.22
48 Finance services	0.00	0.00	0.00	0.00	0.00	0.09	0.09	0.04	6.96	0.04	0.05	0.06
49 Public services	0.00	0.00	0.00	0.00	0.00	-0.27	-0.27	-0.03	19.94	-0.04	-0.04	-0.03
Total	1.25	24.15	-2.75	-3.20	-9.25	-2.05	-4.80	-0.09	100.00	0.00	-0.02	-0.05

Source: Simulations by the European Commission; and calculations by the study team. Note: the data for labour represent the total expenditure in the sector for labour = employment times wages.

Table 20: Sectoral impacts in Mozambique (€ millions) - Scenario A

Sector	MOZ Exports to EU	MOZ Imports from EU	MOZ Total Exports	MOZ Total Imports	Memo: MOZ Exports to SADC	Domestic Shipments	Total Shipments	Total Shipments % change	Share of Value Added	Value Added % change	Unskilled labour % change	Skilled labour % change
1 Rice	0.00	0.00	0.01	-0.43	0.00	-0.04	-0.03	-0.02	0.58	0.07	0.15	0.21
2 Wheat	0.00	6.29	0.07	2.38	0.00	-3.05	-2.98	-0.86	2.21	-0.84	-0.62	-0.56
3 Other Grains	0.00	0.27	0.01	0.12	0.00	-0.39	-0.38	-0.08	2.97	-0.05	0.05	0.12
4 Vegetables, fruit, nuts	-0.02	0.38	0.93	0.07	0.89	-1.38	-0.45	-0.01	21.01	0.05	0.13	0.20
5 Oil Seeds	0.01	0.10	0.17	0.03	0.01	-0.06	0.11	0.04	1.77	0.10	0.19	0.26
6 Sugar	-0.95	0.00	-0.32	-0.21	0.88	-0.17	-0.49	-0.15	1.20	-0.02	0.00	0.01
7 Fibres crops	0.00	0.00	0.09	0.00	0.07	-0.01	0.08	0.12	0.38	0.19	0.27	0.33
8 Other Crops	0.00	0.25	0.01	0.12	0.00	-0.02	-0.02	-0.02	0.61	0.01	0.11	0.18
9 Cattle	0.00	0.30	0.09	0.06	0.09	-3.77	-3.68	-0.37	3.49	-0.30	-0.17	-0.11
10 Other primary	0.00	0.00	0.00	0.00	0.00	-0.48	-0.48	-0.38	0.76	-0.35	-0.22	-0.15
11 Forestry	0.00	0.00	0.93	0.00	0.00	0.13	1.06	0.14	3.51	0.26	0.34	0.41
12 Fishing	0.00	0.00	0.03	0.00	0.00	-0.63	-0.60	-0.18	0.90	-0.07	0.12	0.19
13 Coal	1.89	0.00	14.97	0.00	0.11	0.01	14.98	0.43	8.27	0.75	0.90	0.63
14 Oil	0.00	0.00	0.10	0.00	0.00	0.00	0.10	0.32	0.11	0.52	0.52	0.58
15 Gas	0.08	0.00	5.84	0.00	5.51	-0.02	5.82	0.54	4.26	0.73	0.72	0.70
16 Oil products	0.00	0.03	0.00	-0.09	0.00	0.00	0.01	0.02	0.02	0.02	0.00	-0.03
17 Electricity	0.00	0.46	3.65	-1.29	3.56	-0.59	3.06	0.12	6.72	0.24	0.24	0.21
18 Minerals	0.11	0.00	0.53	2.72	0.00	0.09	0.62	0.10	2.02	0.25	0.34	0.42
19 Cement	0.00	1.42	0.01	0.47	0.00	-0.26	-0.25	-0.10	0.64	-0.01	-0.02	-0.04
20 Ruminant meat	0.00	1.27	0.00	0.47	0.00	-0.56	-0.56	-1.64	0.13	-1.54	-1.56	-1.57
21 Other Meat	0.00	16.59	0.00	2.82	0.00	-4.08	-4.08	-9.11	0.08	-8.98	-9.00	-9.01
22 Vegetable Oils	0.00	4.19	0.75	0.12	0.12	-0.79	-0.04	-0.01	0.63	0.21	0.20	0.19
23 Dairy products	0.00	3.92	0.00	1.08	0.00	-1.33	-1.33	-1.58	0.31	-1.44	-1.45	-1.46
24 Other prepared Food	0.11	8.70	0.57	1.16	0.21	-1.82	-1.25	-0.30	1.39	-0.14	-0.15	-0.16
25 Beverages, tobacco products	0.50	2.98	1.35	0.16	0.10	-0.76	0.59	0.11	0.50	0.53	0.53	0.52
26 Textiles	0.02	1.66	-0.08	-0.09	-0.11	-0.05	-0.13	-0.31	0.12	-0.17	-0.20	-0.22
27 Wearing	0.00	0.42	-0.20	-0.29	-0.21	0.10	-0.11	-0.14	0.15	0.04	0.01	-0.01
28 Leather	0.01	1.45	0.02	-0.01	0.01	0.01	0.03	0.39	0.02	0.66	0.63	0.61
29 Wood and products	0.04	1.49	0.42	0.32	0.03	-0.30	0.12	0.10	0.14	0.32	0.32	0.30
30 Paper & Paper Products	0.00	11.84	-0.31	5.31	-0.33	-5.56	-5.87	-2.19	0.58	-1.84	-1.84	-1.86
31 Chemicals	0.01	30.81	2.22	3.17	0.00	-1.09	1.13	0.26	0.47	0.42	0.39	0.37
32 Pharmaceuticals	0.00	2.21	0.00	0.10	0.00	-0.08	-0.08	-0.32	0.06	-0.15	-0.18	-0.21
33 Rubber and plastics products	0.00	15.22	0.00	3.02	-0.02	-1.80	-1.80	-1.50	0.19	-1.29	-1.31	-1.33
34 Iron & Steel	0.00	0.13	-0.03	3.54	0.01	0.10	0.07	0.09	0.00	0.07	0.05	0.03
35 Metal products	-0.26	33.46	-0.38	2.92	0.05	-0.71	-1.09	-0.12	0.00	-0.14	-0.16	-0.18
36 Computer, electronic, optical products	0.00	28.57	0.03	1.81	0.00	-1.08	-1.06	-4.41	0.01	-4.34	-4.37	-4.40
37 Electrical equipment	0.00	26.91	0.07	0.47	0.01	-0.64	-0.57	-2.98	0.01	-2.87	-2.89	-2.91
38 Machinery and equipment	0.00	18.33	0.07	0.63	0.01	-0.39	-0.32	-0.88	0.01	-0.78	-0.80	-0.82
39 Motor vehicles and parts	0.00	0.40	-0.42	-0.15	-0.43	-0.54	-0.95	-0.76	0.25	-0.52	-0.54	-0.57
40 Other transport equipment	0.01	1.53	0.05	0.38	0.01	-0.28	-0.23	-0.40	0.07	-0.15	-0.17	-0.19
41 Other Manufacturing	0.45	22.93	1.80	6.71	0.51	-3.17	-1.37	-0.45	0.67	-0.31	-0.33	-0.35
42 Construction	0.00	0.02	0.00	0.00	0.00	0.20	0.21	0.01	0.81	0.27	0.27	0.36
43 Trade services	0.24	9.21	0.28	0.95	0.00	-8.55	-8.27	-0.31	7.72	-0.13	-0.01	0.08
44 Land Transport	0.00	0.00	0.00	0.00	0.01	0.73	0.72	0.06	4.88	0.17	0.20	0.29
45 Water Transport	0.00	0.00	-0.02	0.05	0.00	0.10	0.07	0.02	0.25	0.14	0.18	0.27
46 Air Transport	0.00	-0.02	0.01	-0.26	0.00	-0.12	-0.12	-0.05	0.22	0.09	0.12	0.21
47 Commercial services	5.77	14.55	6.73	-2.11	-0.11	-8.86	-2.13	-0.12	5.36	0.12	0.14	0.16
48 Finance services	0.02	6.50	0.07	-2.73	0.00	-6.51	-6.44	-0.66	0.81	-0.10	-0.09	-0.11
49 Public services	0.00	0.00	0.02	-0.03	0.00	-9.72	-9.70	-0.19	12.70	0.19	0.19	0.17
Total	8.06	274.79	40.12	33.45	11.01	-68.20	-28.08	-0.08	100.00	0.11	0.16	0.25

Source: Simulations by the European Commission; and calculations by the study team. Note: the data for labour represent the total expenditure in the sector for labour = employment times wages.

Table 21: Sectoral impacts in Namibia (€ millions) - Scenario A

Sector	NAM Exports to EU	NAM Imports from EU	NAM Total Exports	NAM Total Imports	Memo: NAM Exports to SADC	Domestic Shipments	Total Shipments	Total Shipments % change	Share of Value Added	Value Added % change	Unskilled labour % change	Skilled labour % change
1 Rice	0.00	0.00	-0.03	0.55	-0.03	-0.03	-0.06	-1.23	0.00	-0.36	-0.35	-0.36
2 Wheat	0.00	1.11	0.00	1.93	0.00	0.15	0.15	3.53	0.01	4.46	4.39	3.80
3 Other Grains	0.00	0.00	0.00	0.98	0.00	3.46	3.46	5.01	0.35	5.41	5.23	4.65
4 Vegetables, fruit, nuts	5.41	0.01	9.47	1.69	-0.27	2.60	12.07	5.79	1.24	6.14	5.88	5.30
5 Oil Seeds	0.00	0.00	-0.02	-0.03	-0.02	0.01	-0.01	-1.62	0.00	-1.43	-0.63	-1.25
6 Sugar	0.01	0.19	0.00	2.76	-0.01	0.03	0.03	1.56	0.00	2.42	2.44	2.39
7 Fibres crops	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.80	0.00	1.18	1.61	1.00
8 Other Crops	0.29	0.02	0.22	0.35	-0.01	-0.01	0.21	4.44	0.01	5.46	5.30	4.72
9 Cattle	0.92	0.04	7.44	0.78	6.62	3.89	11.33	2.80	2.27	3.04	3.19	2.60
10 Other primary	0.00	0.00	-0.01	0.00	0.00	1.43	1.42	2.36	0.29	2.63	2.84	2.25
11 Forestry	-0.01	0.00	-0.21	0.03	-0.17	3.62	3.41	2.47	0.81	2.69	2.96	2.31
12 Fishing	2.05	0.00	1.76	0.17	-0.04	60.08	61.84	5.59	4.49	6.43	5.67	5.05
13 Coal	0.00	0.00	0.00	-0.28	0.00	0.11	0.11	8.10	0.00	9.27	10.65	12.83
14 Oil	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-0.04	0.00	-0.32	0.62	0.12
15 Gas	0.00	0.00	0.00	0.00	0.00	0.01	0.01	0.50	0.01	0.58	1.03	0.21
16 Oil products	0.00	0.05	-0.03	0.89	-0.02	-0.01	-0.04	-0.43	0.02	0.13	-0.15	0.07
17 Electricity	0.00	0.04	-0.65	7.28	-0.58	-1.09	-1.74	-0.60	1.80	-0.47	-0.52	-0.30
18 Minerals	-3.30	0.07	-9.54	0.06	-0.95	1.19	-8.35	-0.35	6.20	0.17	0.86	0.20
19 Cement	0.01	0.08	-0.28	1.73	-0.14	-0.28	-0.56	-0.40	0.28	0.42	0.30	0.52
20 Ruminant meat	7.68	0.05	14.83	0.27	-2.50	2.35	17.18	8.16	0.34	8.63	8.58	8.67
21 Other Meat	0.01	0.38	-3.45	2.24	-2.89	-0.44	-3.89	-2.85	0.24	-2.51	-2.56	-2.45
22 Vegetable Oils	0.07	0.01	-0.27	1.08	-0.27	-0.15	-0.41	-2.95	0.00	-2.61	-2.65	-2.55
23 Dairy products	0.07	0.32	0.05	2.92	0.00	13.53	13.58	2.37	0.89	2.42	2.37	2.47
24 Other prepared Food	152.39	0.49	132.96	11.10	-8.16	22.35	155.31	9.83	3.11	10.04	9.99	10.08
25 Beverages, tobacco products	3.80	0.44	2.14	5.93	-1.31	25.82	27.95	2.02	3.12	2.10	2.05	2.15
26 Textiles	0.08	0.48	-0.20	4.34	-0.06	3.73	3.53	1.00	1.53	1.25	1.14	1.35
27 Wearing	0.47	1.12	0.38	5.69	-0.08	-1.13	-0.75	-0.58	0.13	0.05	-0.05	0.17
28 Leather	2.52	0.33	1.75	1.93	-0.94	-0.45	1.29	2.75	0.04	3.31	3.22	3.43
29 Wood and products	0.68	0.04	0.14	1.48	-0.81	0.16	0.30	0.26	0.11	0.77	0.68	0.90
30 Paper & Paper Products	0.00	0.32	-0.62	3.04	-0.27	-0.96	-1.58	-0.69	0.36	0.11	0.03	0.24
31 Chemicals	22.07	0.48	4.96	9.14	-0.09	-3.01	1.95	0.28	1.08	0.98	0.85	1.07
32 Pharmaceuticals	0.00	0.26	-0.14	4.84	-0.04	-0.16	-0.30	-0.35	0.24	0.18	0.07	0.28
33 Rubber and plastics products	0.04	1.18	-0.54	4.11	-0.36	-2.93	-3.47	-1.62	0.33	-0.91	-1.01	-0.79
34 Iron & Steel	0.00	0.01	-0.39	-0.06	-0.15	-1.44	-1.83	-2.15	0.14	-1.10	-1.25	-1.03
35 Metal products	58.29	0.40	31.51	3.13	-16.37	-1.18	30.33	2.72	1.62	3.80	3.70	3.91
36 Computer, electronic, optical products	0.13	0.59	-1.24	8.01	-0.57	-4.39	-5.63	-2.09	0.25	-1.52	-1.63	-1.41
37 Electrical equipment	0.02	1.52	-1.11	4.10	-0.33	-2.96	-4.07	-3.78	0.12	-3.06	-3.17	-2.94
38 Machinery and equipment	0.08	2.52	-4.85	6.71	-2.38	-5.64	-10.49	-3.80	0.35	-3.10	-3.20	-2.98
39 Motor vehicles and parts	0.43	7.45	-2.20	14.50	-2.07	-8.63	-10.83	-3.65	0.20	-2.83	-2.92	-2.70
40 Other transport equipment	0.05	0.36	-69.83	1.13	-0.38	-2.15	-71.98	-9.14	0.83	-8.37	-8.47	-8.23
41 Other Manufacturing	0.60	0.30	-2.46	4.04	-0.16	-0.58	-3.05	-1.84	0.12	-0.92	-1.03	-0.81
42 Construction	0.00	0.01	-0.02	0.10	0.00	6.07	6.05	0.56	2.23	1.44	1.86	1.04
43 Trade services	12.10	0.91	-5.27	0.19	-2.52	8.61	3.34	0.08	14.96	0.43	0.86	0.03
44 Land Transport	-0.08	0.00	-0.23	0.03	-0.01	4.79	4.56	0.45	3.15	0.83	1.31	0.49
45 Water Transport	0.00	0.00	-0.03	0.01	0.00	0.15	0.12	0.12	0.22	0.58	1.02	0.20
46 Air Transport	-1.60	0.04	-4.04	0.51	-0.43	-1.05	-5.09	-1.23	1.06	-0.86	-0.42	-1.26
47 Commercial services	1.12	6.86	0.00	9.50	-0.18	20.09	20.09	0.71	12.68	0.99	0.89	1.04
48 Finance services	0.02	5.54	-0.10	6.29	0.00	7.30	7.20	0.57	2.88	1.15	0.99	1.20
49 Public services	-0.78	0.00	-2.73	0.15	-0.09	161.88	159.16	2.48	29.90	2.77	2.68	2.89
Total	265.64	34.04	97.12	135.37	-39.04	314.74	411.86	1.34	100.00	2.01	2.32	1.51

Source: Simulations by the European Commission; and calculations by the study team. Note: the data for labour represent the total expenditure in the sector for labour = employment times wages.

Table 22: Sectoral impacts in South Africa (€ millions) - Scenario A

Sector	ZAF Exports to EU	ZAF Imports from EU	ZAF Total Exports	ZAF Total Imports	Memo: ZAF Exports to SADC	Domestic Shipments	Total Shipments	Total Shipments % change	Share of Value Added	Value Added % change	Unskilled labour % change	Skilled labour % change
1 Rice	0.00	0.00	-0.05	3.17	0.06	-0.19	-0.24	-0.01	0.07	0.02	0.02	0.02
2 Wheat	0.00	2.10	-0.22	4.26	0.05	10.01	9.78	1.85	0.04	2.20	1.92	1.90
3 Other Grains	-0.01	0.05	-0.17	1.31	0.81	27.63	27.45	0.96	0.24	1.16	1.01	1.00
4 Vegetables, fruit, nuts	106.94	0.58	135.69	3.09	1.37	14.03	149.72	2.35	0.60	2.65	2.34	2.32
5 Oil Seeds	-0.07	0.03	-0.19	0.16	-0.07	1.11	0.92	0.08	0.08	0.19	0.17	0.16
6 Sugar	209.04	0.14	344.13	6.58	0.81	27.35	371.49	6.17	0.15	6.39	6.29	6.28
7 Fibres crops	0.00	0.00	-0.33	0.54	-0.01	-0.02	-0.35	-0.38	0.02	-0.36	-0.31	-0.33
8 Other Crops	-0.12	0.19	-0.30	2.70	0.35	0.10	-0.20	-0.10	0.03	-0.05	-0.04	-0.06
9 Cattle	-0.25	0.39	-0.63	12.32	0.40	263.62	262.99	2.16	1.11	2.39	2.08	2.07
10 Other primary	-0.57	0.00	-3.14	0.06	0.00	7.45	4.31	0.11	0.29	0.16	0.15	0.13
11 Forestry	-0.02	0.01	-0.04	-0.06	0.05	-1.02	-1.05	-0.06	0.08	-0.03	0.05	0.04
12 Fishing	1.00	0.02	0.91	0.08	0.08	3.22	4.13	0.22	0.21	0.25	0.28	0.26
13 Coal	-2.00	0.00	-22.57	0.24	0.01	6.78	-15.79	-0.09	2.04	-0.04	-0.19	-0.13
14 Oil	0.00	0.00	-0.02	4.45	0.00	-0.04	-0.06	-0.12	0.01	-0.14	-0.03	-0.04
15 Gas	0.00	0.00	-0.01	5.71	0.00	-5.96	-5.96	-0.86	0.03	-0.86	-0.76	-0.78
16 Oil products	-0.15	0.90	-1.98	8.54	0.59	19.07	17.09	0.09	0.27	0.21	0.05	0.05
17 Electricity	-0.07	0.10	2.30	3.79	4.37	26.48	28.78	0.07	3.96	0.11	0.08	0.09
18 Minerals	-1.56	0.09	-11.79	2.35	3.11	-35.71	-47.50	-0.07	6.30	-0.05	0.01	-0.01
19 Cement	-0.20	7.70	-0.14	8.02	1.11	-0.13	-0.28	0.00	0.42	0.09	0.07	0.08
20 Ruminant meat	-0.01	0.65	-1.88	0.70	-0.61	7.41	5.53	0.15	0.13	0.10	0.10	0.10
21 Other Meat	0.57	2.53	-9.27	3.88	-10.01	3.92	-5.35	-0.10	0.23	-0.09	-0.09	-0.09
22 Vegetable Oils	-0.08	1.36	-1.11	5.59	0.39	33.11	32.00	0.23	0.78	0.29	0.29	0.29
23 Dairy products	0.00	0.16	-0.12	0.28	0.22	-0.12	-0.24	-0.03	0.01	0.05	0.03	0.03
24 Other prepared Food	11.16	4.48	15.28	7.52	4.96	4.60	19.88	0.42	0.56	0.43	0.43	0.43
25 Beverages, tobacco products	23.66	0.92	36.61	1.72	3.54	18.07	54.68	0.44	0.97	0.50	0.50	0.50
26 Textiles	-0.08	40.97	-1.19	13.02	-1.01	-35.59	-36.78	-0.81	0.21	-0.64	-0.64	-0.63
27 Wearing	-0.01	291.63	-23.14	114.30	-22.97	-82.81	-105.94	-2.84	0.19	-2.68	-2.68	-2.68
28 Leather	-0.48	97.39	-2.00	35.03	-0.92	-15.17	-17.17	-1.38	0.05	-1.28	-1.29	-1.28
29 Wood and products	-0.06	0.49	-0.68	1.46	0.48	3.41	2.72	0.09	0.21	0.18	0.17	0.18
30 Paper & Paper Products	-0.25	42.79	-6.56	28.37	-1.14	-36.29	-42.86	-0.32	1.11	-0.21	-0.21	-0.20
31 Chemicals	-8.59	15.26	-23.90	20.45	-2.57	-15.40	-39.29	-0.19	1.23	-0.11	-0.13	-0.12
32 Pharmaceuticals	-0.10	3.02	0.28	6.47	3.02	-1.09	-0.82	-0.02	0.21	0.07	0.06	0.06
33 Rubber and plastics products	-0.24	164.52	-3.66	92.88	-2.33	-64.68	-68.34	-0.89	0.36	-0.77	-0.78	-0.77
34 Iron & Steel	-4.05	2.24	-26.08	8.13	0.29	24.57	-1.50	-0.01	0.34	0.04	0.00	0.01
35 Metal products	24.55	24.05	-143.36	17.77	-2.86	-12.76	-156.12	-0.33	1.31	-0.25	-0.26	-0.25
36 Computer, electronic, optical products	0.43	-1.03	-0.11	-1.03	-2.46	5.28	5.17	0.05	0.67	0.28	0.28	0.28
37 Electrical equipment	-0.20	16.26	-14.71	14.75	-11.28	-10.46	-25.16	-0.28	0.33	-0.16	-0.17	-0.16
38 Machinery and equipment	-3.94	60.96	-21.46	48.55	-6.10	-38.78	-60.24	-0.41	0.20	-0.32	-0.32	-0.31
39 Motor vehicles and parts	414.68	1647.30	827.97	626.26	-5.92	-411.44	416.53	1.42	1.08	2.50	2.50	2.50
40 Other transport equipment	1.75	-3.46	11.67	-6.79	1.26	5.10	16.77	0.67	0.14	1.17	1.17	1.17
41 Other Manufacturing	-1.50	1.09	-36.33	6.14	-1.40	-9.63	-45.97	-0.37	0.42	-0.28	-0.29	-0.28
42 Construction	0.76	3.78	0.58	1.98	0.00	41.44	42.02	0.10	2.39	0.20	0.19	0.17
43 Trade services	132.96	92.79	171.24	57.87	-0.57	105.03	276.27	0.26	12.43	0.32	0.31	0.29
44 Land Transport	-0.22	0.28	-0.85	1.15	0.00	27.79	26.95	0.10	2.29	0.19	0.21	0.19
45 Water Transport	-0.04	0.03	-0.11	0.30	0.00	0.38	0.27	0.03	0.22	0.14	0.15	0.13
46 Air Transport	-0.74	1.21	-3.45	3.67	0.00	5.55	2.10	0.02	0.34	0.10	0.13	0.11
47 Commercial services	76.78	138.84	115.98	96.92	-0.92	-56.39	59.59	0.03	15.90	0.11	0.11	0.11
48 Finance services	24.44	37.36	30.97	37.64	-1.31	17.14	48.11	0.08	6.83	0.14	0.14	0.15
49 Public services	-0.39	0.38	-2.59	2.23	0.00	211.35	208.76	0.09	32.92	0.15	0.14	0.15
Total	1002.75	2700.57	1329.44	1314.54	-47.16	87.38	1416.82	0.13	100.00	0.20	0.19	0.17

Source: Simulations by the European Commission; and calculations by the study team. Note: the data for labour represent the total expenditure in the sector for labour = employment times wages.

Table 23: Sectoral impacts in Botswana (€ millions) - Scenario B

Sector	BWA Exports to EU	BWA Imports from EU	BWA Total Exports	BWA Total Imports	Memo: BWA Exports to SADC	Domestic Shipments	Total Shipments	Total Shipments % change	Share of Value Added	Value Added % change	Unskilled labour % change	Skilled labour % change
1 Rice	0.00	0.00	0.00	0.23	0.00	0.03	0.03	1.09	0.00	1.14	1.15	1.15
2 Wheat	0.00	5.54	0.00	0.46	0.00	-1.43	-1.43	-6.10	0.07	-6.23	-5.46	-5.47
3 Other Grains	0.00	0.00	0.01	0.35	0.01	0.08	0.09	0.69	0.02	0.63	0.52	0.51
4 Vegetables, fruit, nuts	0.00	0.01	0.01	-0.12	0.01	1.15	1.16	0.47	0.73	0.46	0.37	0.36
5 Oil Seeds	0.00	0.00	0.00	0.05	0.00	0.01	0.01	0.32	0.00	0.36	0.28	0.27
6 Sugar	0.00	0.00	0.00	0.33	0.00	0.11	0.11	1.17	0.01	1.18	1.13	1.12
7 Fibres crops	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-0.07	0.01	-0.07	-0.10	-0.11
8 Other Crops	0.00	0.01	0.00	0.34	0.00	0.00	0.01	1.46	0.00	1.49	1.25	1.24
9 Cattle	0.00	0.00	0.15	0.08	0.15	4.14	4.29	0.83	1.28	0.87	0.73	0.72
10 Other primary	0.00	0.00	0.00	0.00	0.00	-0.09	-0.09	-0.15	0.14	-0.17	-0.18	-0.19
11 Forestry	0.00	0.00	0.00	-0.01	0.00	0.05	0.05	0.12	0.14	0.11	0.09	0.08
12 Fishing	0.00	0.00	0.00	0.00	0.00	0.01	0.01	0.14	0.02	0.14	0.10	0.09
13 Coal	0.00	0.00	0.05	0.00	-0.04	0.22	0.27	0.09	0.95	0.08	0.09	0.12
14 Oil	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.26	0.00	0.26	0.21	0.20
15 Gas	0.00	0.00	0.00	-0.01	0.00	0.01	0.01	0.43	0.00	0.36	0.33	0.31
16 Oil products	0.00	0.00	0.00	1.15	0.00	0.02	0.02	0.43	0.01	0.43	0.43	0.44
17 Electricity	0.00	0.05	0.00	0.14	0.00	2.22	2.22	0.36	0.41	0.35	0.48	0.48
18 Minerals	2.18	0.60	7.64	6.11	5.71	1.55	9.19	0.12	19.08	0.09	0.05	0.04
19 Cement	0.00	0.49	-0.06	-0.41	-0.06	1.83	1.77	0.34	0.41	0.27	0.29	0.29
20 Ruminant meat	1.12	0.00	4.19	-0.15	0.04	0.53	4.72	1.91	0.19	1.85	1.86	1.86
21 Other Meat	0.00	0.00	-0.05	-0.77	-0.05	1.30	1.25	0.64	0.11	0.55	0.56	0.56
22 Vegetable Oils	0.00	0.10	-0.03	0.33	-0.02	0.18	0.15	0.82	0.00	0.58	0.62	0.62
23 Dairy products	0.00	0.00	-0.02	0.41	-0.02	-0.98	-1.01	-1.03	0.17	-1.01	-1.00	-1.00
24 Other prepared Food	0.00	0.27	-0.19	-0.12	-0.20	2.73	2.54	0.48	0.55	0.53	0.54	0.54
25 Beverages, tobacco products	0.00	0.06	0.00	0.18	0.00	0.45	0.44	0.12	0.54	0.05	0.05	0.05
26 Textiles	0.00	0.22	-0.38	-1.36	-0.37	-0.21	-0.58	-2.94	0.01	-2.98	-2.95	-2.95
27 Wearing	0.02	15.39	-0.03	2.74	-0.04	-2.52	-2.54	-2.09	0.11	-2.10	-2.08	-2.08
28 Leather	0.00	4.25	0.00	0.21	0.00	-0.15	-0.15	-0.83	0.02	-0.77	-0.75	-0.75
29 Wood and products	0.00	0.27	-0.01	0.17	-0.01	0.37	0.36	0.71	0.06	0.63	0.66	0.67
30 Paper & Paper Products	0.00	1.13	-0.08	0.59	-0.08	-0.09	-0.17	-0.06	0.46	-0.07	-0.05	-0.05
31 Chemicals	0.01	1.86	-0.63	0.41	-0.64	0.41	-0.22	-0.24	0.20	-0.28	-0.27	-0.26
32 Pharmaceuticals	0.00	0.66	0.01	0.34	0.01	0.07	0.08	0.53	0.04	0.52	0.53	0.54
33 Rubber and plastics products	0.00	5.83	-0.81	0.69	-0.81	-0.27	-1.07	-1.76	0.13	-1.80	-1.79	-1.79
34 Iron & Steel	0.00	0.49	-0.10	0.29	-0.09	0.90	0.80	0.61	0.12	0.47	0.48	0.49
35 Metal products	0.00	4.77	-0.16	1.02	-0.13	-0.27	-0.43	-0.16	0.35	-0.20	-0.19	-0.19
36 Computer, electronic, optical products	0.01	23.21	-0.01	0.72	-0.03	-1.37	-1.38	-2.93	0.08	-2.81	-2.80	-2.80
37 Electrical equipment	0.00	3.17	0.07	0.73	0.07	0.17	0.24	0.74	0.06	0.71	0.72	0.73
38 Machinery and equipment	0.00	4.74	-0.16	1.92	-0.17	0.88	0.72	0.91	0.13	0.88	0.89	0.89
39 Motor vehicles and parts	0.00	2.86	-0.43	-2.13	-0.47	-2.92	-3.35	-3.08	0.15	-2.70	-2.69	-2.69
40 Other transport equipment	0.00	-0.06	0.00	-0.01	0.00	-0.10	-0.10	-0.26	0.04	-0.27	-0.27	-0.26
41 Other Manufacturing	3.89	0.97	3.37	0.53	-0.06	0.07	3.44	2.46	0.14	2.31	2.32	2.32
42 Construction	0.00	0.02	0.00	0.01	0.00	2.44	2.43	0.03	13.75	0.00	-0.04	-0.05
43 Trade services	5.63	0.93	6.66	0.44	-0.03	-1.38	5.28	0.09	13.31	0.09	0.05	0.04
44 Land Transport	0.00	0.00	0.00	0.01	0.00	0.83	0.83	0.10	1.07	0.02	-0.09	-0.10
45 Water Transport	0.00	0.00	0.00	0.01	0.00	0.01	0.01	0.10	0.00	0.01	-0.14	-0.16
46 Air Transport	0.00	0.00	0.00	-0.03	0.00	-0.03	-0.03	-0.04	0.06	-0.07	-0.09	-0.10
47 Commercial services	0.02	2.83	0.02	2.37	0.00	-8.19	-8.17	-0.18	10.67	-0.15	-0.14	-0.14
48 Finance services	0.01	0.01	0.01	0.00	0.00	-1.23	-1.23	-0.06	5.18	-0.02	-0.02	-0.01
49 Public services	0.00	0.00	0.00	-0.01	0.00	-6.03	-6.03	-0.05	28.97	-0.05	-0.05	-0.04
Total	12.90	80.70	19.02	18.24	2.67	-4.47	14.55	0.03	100.00	0.01	-0.02	-0.04

Source: Simulations by the European Commission; and calculations by the study team. Note: the data for labour represent the total expenditure in the sector for labour = employment times wages.

Table 24: Sectoral impacts in Eswatini (€ millions) - Scenario B

Sector	SWZ Exports to EU	SWZ Imports from EU	SWZ Total Exports	SWZ Total Imports	Memo: SWZ Exports to SADC	Domestic Shipments	Total Shipments	Total Shipments % change	Share of Value Added	Value Added % change	Unskilled labour % change	Skilled labour % change
1 Rice	0.00	0.00	0.00	-0.56	0.00	0.06	0.07	0.07	1.12	0.01	0.04	0.05
2 Wheat	0.00	0.00	0.00	-0.03	0.00	-0.01	-0.01	-1.88	0.00	-2.43	-2.34	-2.41
3 Other Grains	0.00	0.00	0.00	-0.04	0.00	-0.02	-0.02	-0.07	0.29	-0.08	-0.27	-0.33
4 Vegetables, fruit, nuts	0.01	0.00	0.08	0.17	0.04	-0.88	-0.80	-0.73	1.35	-0.82	-0.90	-0.96
5 Oil Seeds	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.31	0.02	0.33	0.10	0.03
6 Sugar	-0.58	0.00	5.86	-0.04	6.26	4.85	10.71	0.82	7.31	0.78	0.54	0.48
7 Fibres crops	0.00	0.00	0.09	-0.01	0.00	0.00	0.09	0.81	0.06	0.93	0.60	0.53
8 Other Crops	0.00	0.00	0.00	0.03	0.00	0.01	0.01	0.31	0.04	0.33	0.09	0.02
9 Cattle	0.00	0.00	0.03	0.01	0.03	-0.58	-0.55	-0.33	2.26	-0.50	-0.61	-0.68
10 Other primary	0.00	0.00	0.00	0.00	0.00	-0.81	-0.81	-2.00	0.22	-2.33	-2.20	-2.27
11 Forestry	0.00	0.00	0.21	-0.10	0.21	-0.13	0.08	0.14	0.86	0.08	-0.04	-0.12
12 Fishing	0.00	0.00	0.00	-0.01	0.00	-0.07	-0.07	-0.47	0.19	-0.55	-0.69	-0.76
13 Coal	0.00	0.00	0.46	0.00	0.41	0.04	0.50	2.90	0.08	2.99	4.15	4.42
14 Oil	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.31	0.01	0.43	0.18	0.12
15 Gas	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.11	0.02	0.06	-0.03	-0.12
16 Oil products	0.00	0.00	0.00	0.12	0.00	0.01	0.02	0.55	0.04	0.48	0.54	0.57
17 Electricity	0.00	0.02	0.00	-1.04	0.00	0.91	0.91	1.28	0.61	1.25	1.23	1.26
18 Minerals	0.00	0.00	0.03	-0.03	0.00	-0.37	-0.34	-0.46	0.81	-0.50	-0.60	-0.68
19 Cement	0.00	0.00	-0.07	-0.25	-0.10	0.17	0.09	0.44	0.20	0.39	0.52	0.55
20 Ruminant meat	0.00	0.00	0.06	-0.18	-0.01	0.03	0.09	0.24	0.23	0.02	0.09	0.10
21 Other Meat	0.00	0.00	-0.02	-0.20	-0.02	-0.37	-0.39	-0.36	0.85	-0.68	-0.64	-0.63
22 Vegetable Oils	0.00	0.00	0.01	-0.40	0.00	-0.07	-0.07	-0.10	0.47	-0.24	-0.15	-0.14
23 Dairy products	0.00	1.82	-0.02	0.02	-0.04	-0.90	-0.92	-2.99	0.11	-3.02	-2.97	-2.96
24 Other prepared Food	0.02	0.43	-10.04	-1.86	-10.20	-0.78	-10.82	-3.96	2.34	-4.24	-4.19	-4.17
25 Beverages, tobacco products	0.01	0.96	0.06	0.04	-0.08	-0.41	-0.35	-0.41	1.26	-0.47	-0.44	-0.42
26 Textiles	0.00	0.61	-1.42	-1.58	-1.46	-1.94	-3.36	-1.28	3.17	-1.36	-1.35	-1.33
27 Wearing	0.00	0.20	-8.19	-0.60	-8.35	0.20	-8.00	-2.70	3.25	-2.80	-2.79	-2.76
28 Leather	0.00	0.15	0.00	-0.28	0.00	0.14	0.14	1.37	0.19	1.33	1.35	1.37
29 Wood and products	0.00	2.12	-0.37	0.46	-0.38	-0.56	-0.94	-1.06	0.78	-1.17	-1.15	-1.13
30 Paper & Paper Products	0.00	0.08	-0.65	-0.55	-0.65	0.52	-0.13	-0.22	0.62	-0.29	-0.24	-0.21
31 Chemicals	0.51	1.27	-6.85	-1.08	-20.74	0.96	-5.89	-0.45	17.85	-0.51	-0.49	-0.47
32 Pharmaceuticals	0.00	-0.03	0.66	-0.77	0.04	0.19	0.85	1.16	1.16	1.12	1.13	1.16
33 Rubber and plastics products	0.00	1.55	-0.36	-0.61	-0.36	0.08	-0.28	-0.43	0.70	-0.58	-0.55	-0.52
34 Iron & Steel	0.00	0.00	0.01	0.09	0.00	0.29	0.30	1.90	0.09	1.86	2.00	2.02
35 Metal products	0.02	0.04	0.76	0.16	0.00	0.38	1.14	2.99	0.38	2.95	3.02	3.04
36 Computer, electronic, optical products	0.01	1.24	0.33	0.10	-0.01	0.07	0.39	2.45	0.27	2.40	2.47	2.50
37 Electrical equipment	0.00	0.07	0.18	-0.08	0.07	0.50	0.68	2.02	0.41	1.96	2.03	2.05
38 Machinery and equipment	0.02	0.27	0.31	0.48	-0.03	0.28	0.58	2.29	0.45	2.27	2.31	2.33
39 Motor vehicles and parts	0.00	0.61	-0.26	-1.02	-0.27	-0.12	-0.38	-4.55	0.14	-4.59	-4.50	-4.48
40 Other transport equipment	0.00	0.00	0.06	-0.01	0.01	0.01	0.07	1.87	0.06	1.81	1.90	1.92
41 Other Manufacturing	0.01	3.53	0.22	0.01	-0.01	-0.09	0.13	0.44	0.38	0.39	0.46	0.49
42 Construction	0.00	0.01	0.01	0.00	0.00	0.37	0.38	0.18	1.05	-0.13	-0.25	-0.34
43 Trade services	0.01	0.03	0.09	-0.18	0.03	-7.20	-7.10	-0.74	13.47	-0.78	-0.88	-0.97
44 Land Transport	0.00	-0.03	0.02	-0.16	0.00	-1.17	-1.16	-0.50	2.33	-0.58	-0.77	-0.86
45 Water Transport	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.04	0.02	-0.09	-0.36	-0.46
46 Air Transport	0.00	0.00	0.03	-0.03	0.01	-0.05	-0.02	-0.15	0.09	-0.25	-0.43	-0.52
47 Commercial services	4.39	1.97	6.45	-0.78	-0.03	-2.84	3.60	0.49	9.01	0.45	0.47	0.48
48 Finance services	0.02	4.43	0.04	-2.17	0.00	-2.32	-2.29	-0.51	6.66	-0.53	-0.51	-0.49
49 Public services	0.01	0.00	0.04	-0.06	0.00	-12.23	-12.19	-0.76	16.72	-0.87	-0.86	-0.84
Total	4.48	21.36	-12.16	-13.01	-35.65	-23.87	-36.03	-0.39	100	-0.53	-0.66	-0.75

Source: Simulations by the European Commission; and calculations by the study team. Note: the data for labour represent the total expenditure in the sector for labour = employment times wages.

Table 25: Sectoral impacts in Lesotho (€ millions) - Scenario B

Sector	LSO Exports to EU	LSO Imports from EU	LSO Total Exports	LSO Total Imports	Memo: Intra LSO Exports to SADC	Domestic Shipments	Total Shipments	Total Shipments % change	Share of Value Added	Value Added % change	Unskilled labour % change	Skilled labour % change
1 Rice	0.00	0.00	0.00	-0.13	0.00	0.03	0.03	0.08	1.00	0.01	0.02	0.02
2 Wheat	0.00	1.03	0.00	-0.30	0.00	-0.02	-0.02	-10.85	0.00	-15.01	-12.67	-12.68
3 Other Grains	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.33	-0.04	-0.05	-0.06
4 Vegetables, fruit, nuts	0.00	0.00	0.00	0.06	0.00	-0.08	-0.08	-0.19	1.21	-0.26	-0.24	-0.25
5 Oil Seeds	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.68	0.02	0.67	0.55	0.54
6 Sugar	0.00	0.00	0.00	-0.16	0.00	-0.29	-0.29	-0.14	2.20	-0.31	-0.29	-0.30
7 Fibres crops	0.00	0.00	0.01	-0.07	0.01	0.00	0.01	0.36	0.03	0.35	0.28	0.27
8 Other Crops	0.00	0.01	0.01	0.03	0.00	0.01	0.02	0.76	0.09	0.33	0.26	0.25
9 Cattle	0.00	0.00	0.00	0.04	0.00	0.04	0.04	0.05	1.54	-0.20	-0.19	-0.20
10 Other primary	0.00	0.00	0.12	0.00	0.02	-1.65	-1.54	-1.15	0.12	-2.17	-1.93	-1.94
11 Forestry	0.00	0.00	0.00	0.00	0.00	0.06	0.07	0.54	0.35	0.48	0.45	0.44
12 Fishing	0.00	0.00	0.00	0.00	0.00	-0.01	-0.01	-0.09	0.26	-0.15	-0.16	-0.17
13 Coal	0.00	0.00	0.00	0.63	0.00	0.02	0.02	0.59	0.03	0.42	0.53	0.57
14 Oil	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.15	0.03	0.16	0.10	0.09
15 Gas	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.05	0.03	-0.01	0.02	0.01
16 Oil products	0.00	0.00	0.00	0.17	0.00	0.04	0.04	0.52	0.19	0.46	0.46	0.46
17 Electricity	0.00	0.00	0.00	-0.31	0.00	0.34	0.34	0.48	1.15	0.34	0.33	0.34
18 Minerals	0.71	0.00	0.71	-0.01	0.00	-0.05	0.65	0.14	11.45	0.06	0.04	0.03
19 Cement	0.00	0.01	0.00	0.06	0.00	0.02	0.02	0.32	0.00	0.26	0.26	0.26
20 Ruminant meat	0.00	0.00	0.00	-0.04	0.00	0.07	0.07	0.42	0.16	0.02	0.04	0.04
21 Other Meat	0.00	0.00	0.00	-0.21	0.00	0.32	0.32	0.51	0.58	0.01	0.01	0.02
22 Vegetable Oils	0.00	0.20	0.00	-0.09	0.00	0.07	0.07	0.22	0.41	0.02	0.04	0.05
23 Dairy products	0.00	0.00	0.00	-0.09	0.00	-0.22	-0.22	-1.70	0.07	-2.01	-2.00	-2.00
24 Other prepared Food	0.00	0.01	0.07	-0.42	0.06	0.06	0.13	0.15	0.81	-2.70	-2.69	-2.69
25 Beverages, tobacco products	0.00	0.00	0.00	-0.02	0.00	0.00	0.00	0.00	0.34	-0.13	-0.01	0.00
26 Textiles	0.00	0.28	-3.29	-3.04	-3.14	1.74	-1.55	-0.48	6.39	1.19	1.21	1.21
27 Wearing	0.01	23.47	0.72	-0.67	0.22	-3.51	-2.79	-0.45	10.27	-0.45	-0.44	-0.44
28 Leather	0.00	0.12	0.11	-0.04	0.11	0.11	0.22	1.64	0.43	-1.49	-1.49	-1.49
29 Wood and products	0.00	0.00	0.00	-0.10	0.00	0.21	0.22	0.80	0.43	0.66	0.67	0.67
30 Paper & Paper Products	0.00	0.01	0.07	-0.13	0.07	0.20	0.26	0.74	0.63	-0.81	-0.75	-0.75
31 Chemicals	0.00	0.02	0.00	-0.25	0.00	0.43	0.43	0.66	0.84	0.57	0.70	0.71
32 Pharmaceuticals	0.00	0.01	0.01	-0.22	0.00	0.06	0.06	0.21	0.89	0.16	0.17	0.18
33 Rubber and plastics products	0.00	0.15	0.01	-0.06	0.00	0.12	0.13	0.47	0.42	0.09	0.18	0.19
34 Iron & Steel	0.00	0.00	0.00	0.71	0.00	0.07	0.07	1.16	0.00	0.99	0.98	0.99
35 Metal products	0.00	0.06	0.01	0.45	0.01	0.15	0.15	1.37	0.07	0.82	1.03	1.03
36 Computer, electronic, optical products	0.00	0.61	0.30	0.04	0.30	0.01	0.31	1.70	0.57	-7.15	-7.14	-7.14
37 Electrical equipment	0.00	0.01	0.44	0.04	0.35	0.32	0.76	1.84	1.04	1.65	1.65	1.65
38 Machinery and equipment	0.00	0.66	0.04	0.31	0.04	0.13	0.17	1.79	0.28	0.58	0.62	0.62
39 Motor vehicles and parts	0.00	0.24	0.02	-0.77	0.02	-0.11	-0.09	-1.65	0.17	-6.21	-6.19	-6.19
40 Other transport equipment	0.00	0.00	0.07	0.00	0.07	-0.01	0.07	1.38	0.15	0.35	0.37	0.38
41 Other Manufacturing	0.00	0.03	0.14	0.04	0.14	0.10	0.24	1.05	0.41	-1.83	-1.73	-1.73
42 Construction	0.00	0.00	0.00	0.00	0.00	0.72	0.72	0.45	0.55	-0.11	-0.11	-0.13
43 Trade services	0.01	0.00	0.05	-0.04	0.00	-2.12	-2.07	-0.42	12.71	-0.42	-0.40	-0.41
44 Land Transport	0.00	0.00	0.00	0.00	0.00	-0.18	-0.18	-0.13	2.20	-0.23	-0.29	-0.30
45 Water Transport	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.12	0.02	-0.04	-0.16	-0.18
46 Air Transport	0.03	0.00	0.44	-0.04	0.02	0.00	0.43	0.44	1.28	0.02	-0.05	-0.06
47 Commercial services	0.08	0.27	0.70	-0.08	0.02	-0.71	-0.02	0.00	10.95	0.09	0.10	0.10
48 Finance services	0.00	0.00	0.00	0.00	0.00	-0.59	-0.58	-0.25	6.96	-0.27	-0.27	-0.27
49 Public services	0.00	0.00	0.01	-0.01	0.00	-4.13	-4.12	-0.41	19.94	-0.49	-0.48	-0.48
Total	0.85	27.22	0.77	-4.74	-1.65	-8.23	-7.47	-0.14	100	-0.20	-0.21	-0.22

Source: Simulations by the European Commission; and calculations by the study team. Note: the data for labour represent the total expenditure in the sector for labour = employment times wages.

Table 26: Sectoral impacts in Mozambique (€ millions) - Scenario B

Sector	MOZ Exports to EU	MOZ Imports from EU	MOZ Total Exports	MOZ Total Imports	Memo: MOZ Exports to SADC	Domestic Shipments	Total Shipments	Total Shipments % change	Share of Value Added	Value Added % change	Unskilled labour % change	Skilled labour % change
1 Rice	0.00	0.00	0.01	-0.72	0.00	-0.10	-0.09	-0.04	0.58	0.03	0.07	0.14
2 Wheat	0.00	6.01	0.07	2.24	-0.01	-3.15	-3.08	-0.89	2.21	-0.87	-0.71	-0.63
3 Other Grains	0.00	0.28	0.02	0.09	0.00	-0.57	-0.55	-0.12	2.97	-0.09	-0.04	0.04
4 Vegetables, fruit, nuts	-0.06	0.39	0.97	-0.17	0.78	-2.68	-1.71	-0.04	21.01	0.01	0.05	0.13
5 Oil Seeds	0.02	0.10	0.19	0.02	-0.03	-0.07	0.13	0.04	1.77	0.09	0.13	0.21
6 Sugar	-0.81	0.00	0.10	-0.32	1.07	-0.31	-0.21	-0.06	1.20	0.07	0.07	0.09
7 Fibres crops	0.00	0.00	0.09	0.00	0.04	-0.04	0.05	0.07	0.38	0.14	0.17	0.24
8 Other Crops	0.01	0.26	0.05	0.09	0.00	-0.03	0.01	0.01	0.61	0.04	0.08	0.16
9 Cattle	0.00	0.31	0.09	0.02	0.09	-4.13	-4.04	-0.41	3.49	-0.35	-0.27	-0.20
10 Other primary	0.00	0.00	0.00	0.00	0.00	-0.54	-0.54	-0.43	0.76	-0.42	-0.33	-0.25
11 Forestry	0.00	0.00	0.87	0.00	0.00	-0.01	0.86	0.11	3.51	0.22	0.24	0.32
12 Fishing	0.00	0.00	0.03	0.00	0.00	-0.75	-0.72	-0.22	0.90	-0.14	-0.01	0.07
13 Coal	1.89	0.00	17.24	0.00	0.38	0.00	17.24	0.49	8.27	0.71	0.89	0.58
14 Oil	0.00	0.00	0.07	0.00	0.00	0.00	0.07	0.23	0.11	0.37	0.34	0.41
15 Gas	-0.20	0.00	19.89	0.00	20.78	-0.07	19.82	1.85	4.26	2.11	2.18	2.16
16 Oil products	0.00	0.04	0.01	0.22	0.01	0.01	0.02	0.06	0.02	0.06	0.04	0.01
17 Electricity	0.00	0.49	17.41	-8.89	17.38	-12.30	5.11	0.20	6.72	0.16	0.18	0.15
18 Minerals	0.09	0.01	0.50	7.50	0.04	0.25	0.75	0.12	2.02	0.23	0.24	0.32
19 Cement	0.00	1.49	-0.11	0.57	-0.10	-0.34	-0.45	-0.17	0.64	-0.13	-0.07	-0.10
20 Ruminant meat	0.00	1.28	0.00	0.39	0.00	-0.48	-0.48	-1.42	0.13	-1.33	-1.33	-1.34
21 Other Meat	0.00	16.75	-0.01	2.65	-0.01	-3.88	-3.89	-8.68	0.08	-8.54	-8.55	-8.56
22 Vegetable Oils	0.00	4.19	0.26	-0.07	-0.37	-0.77	-0.51	-0.17	0.63	0.04	0.04	0.02
23 Dairy products	0.00	3.85	0.00	1.26	0.00	-1.71	-1.71	-2.03	0.31	-1.90	-1.90	-1.91
24 Other prepared Food	0.09	8.85	-2.10	0.95	-2.44	-1.43	-3.53	-0.85	1.39	-0.70	-0.70	-0.71
25 Beverages, tobacco products	0.33	2.98	0.68	0.11	-0.27	-0.80	-0.12	-0.02	0.50	0.35	0.38	0.36
26 Textiles	0.01	1.66	-0.44	-0.20	-0.46	-0.08	-0.52	-1.20	0.12	-1.01	-0.96	-0.99
27 Wearing	0.00	0.42	-0.17	-0.36	-0.18	0.00	-0.18	-0.23	0.15	-0.05	0.01	-0.02
28 Leather	0.01	1.45	0.03	-0.16	0.02	0.00	0.04	0.51	0.02	0.75	0.75	0.72
29 Wood and products	0.04	1.51	0.22	0.17	-0.09	-0.27	-0.05	-0.04	0.14	0.18	0.20	0.18
30 Paper & Paper Products	0.00	11.91	-3.02	4.87	-3.04	-5.63	-8.65	-3.22	0.58	-2.87	-2.84	-2.87
31 Chemicals	0.00	31.11	0.84	3.49	-0.02	-1.29	-0.45	-0.10	0.47	0.06	0.16	0.13
32 Pharmaceuticals	0.00	2.21	0.00	0.09	0.00	-0.10	-0.10	-0.41	0.06	-0.25	-0.22	-0.25
33 Rubber and plastics products	0.00	15.31	-0.08	3.42	-0.09	-1.65	-1.73	-1.44	0.19	-1.22	-1.17	-1.20
34 Iron & Steel	-0.03	0.24	-0.65	5.91	-0.06	0.11	-0.54	-0.70	0.00	-0.75	-0.64	-0.67
35 Metal products	-10.23	33.64	-18.53	2.86	-2.46	-1.05	-19.58	-2.08	0.00	-2.09	-2.03	-2.06
36 Computer, electronic, optical products	0.00	28.62	-0.07	1.82	-0.05	-1.19	-1.26	-5.28	0.01	-5.20	-5.07	-5.09
37 Electrical equipment	0.00	27.14	0.02	0.55	0.01	-0.65	-0.62	-3.27	0.01	-3.09	-2.96	-2.98
38 Machinery and equipment	0.00	18.85	-0.14	1.13	-0.14	-0.34	-0.48	-1.31	0.01	-1.13	-1.03	-1.05
39 Motor vehicles and parts	0.00	0.27	-0.81	-0.22	-0.82	-1.14	-1.95	-1.55	0.25	-1.32	-1.28	-1.31
40 Other transport equipment	0.00	1.53	0.03	0.44	0.00	-0.37	-0.34	-0.59	0.07	-0.37	-0.32	-0.35
41 Other Manufacturing	0.23	23.01	-1.95	6.54	-2.58	-3.15	-5.10	-1.68	0.67	-1.56	-1.52	-1.55
42 Construction	0.00	0.02	0.00	0.03	0.00	1.35	1.35	0.09	0.81	0.15	0.12	0.22
43 Trade services	0.24	9.16	0.28	0.55	0.00	-10.46	-10.18	-0.38	7.72	-0.21	-0.19	-0.08
44 Land Transport	0.06	0.00	0.10	0.00	0.02	0.01	0.10	0.01	4.88	0.10	0.08	0.19
45 Water Transport	0.11	0.00	0.26	0.03	0.01	0.09	0.35	0.11	0.25	0.22	0.21	0.31
46 Air Transport	0.01	-0.05	0.07	-0.48	0.02	-0.21	-0.15	-0.06	0.22	0.06	0.05	0.15
47 Commercial services	5.76	14.57	6.72	-2.18	-0.07	-9.54	-2.82	-0.16	5.36	0.04	0.04	0.07
48 Finance services	0.02	6.48	0.07	-3.03	0.00	-6.87	-6.80	-0.70	0.81	-0.21	-0.20	-0.23
49 Public services	0.00	0.00	0.02	-0.03	0.00	-11.76	-11.74	-0.23	12.70	0.08	0.10	0.08
Total	-2.38	276.32	39.13	31.18	27.37	-88.10	-48.97	-0.14	100	0.08	0.07	0.17

Source: Simulations by the European Commission; and calculations by the study team. Note: the data for labour represent the total expenditure in the sector for labour = employment times wages.

Table 27: Sectoral impacts in Namibia (€ millions) - Scenario B

Sector	NAM Exports to EU	NAM Imports from EU	NAM Total Exports	NAM Total Imports	Memo: NAM Exports to SADC	Domestic Shipments	Total Shipments	Total Shipments % change	Share of Value Added	Value Added % change	Unskilled labour % change	Skilled labour % change
1 Rice	0.00	0.00	-0.02	0.51	-0.02	-0.02	-0.05	-0.97	0.00	-0.39	-0.39	-0.39
2 Wheat	0.00	3.07	0.00	1.81	0.00	-0.12	-0.12	-2.97	0.01	-2.72	-1.78	-2.30
3 Other Grains	0.00	0.00	0.00	0.89	0.00	3.19	3.19	4.61	0.35	4.98	4.76	4.27
4 Vegetables, fruit, nuts	5.43	0.02	9.45	1.46	-0.26	2.80	12.25	5.88	1.24	6.21	5.85	5.36
5 Oil Seeds	0.00	0.00	-0.02	-0.02	-0.02	0.01	-0.02	-2.59	0.00	-2.57	-1.71	-2.24
6 Sugar	0.01	0.26	0.00	2.59	0.00	0.03	0.03	1.63	0.00	2.21	2.22	2.19
7 Fibres crops	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.71	0.00	1.03	1.38	0.87
8 Other Crops	0.31	0.05	0.24	0.47	-0.01	0.00	0.25	5.22	0.01	6.32	5.96	5.48
9 Cattle	0.96	0.04	7.79	0.61	6.92	1.42	9.22	2.28	2.27	2.48	2.61	2.11
10 Other primary	0.00	0.00	0.00	0.00	0.00	1.10	1.09	1.82	0.29	2.03	2.23	1.73
11 Forestry	-0.01	0.00	-0.20	0.03	-0.17	3.07	2.88	2.08	0.81	2.29	2.50	1.95
12 Fishing	2.08	0.00	1.82	0.15	-0.04	52.46	54.29	4.91	4.49	5.64	4.95	4.42
13 Coal	0.00	0.00	0.00	-0.22	0.00	0.11	0.11	7.93	0.00	9.03	10.59	12.45
14 Oil	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.08	0.00	-0.11	0.66	0.23
15 Gas	0.00	0.00	0.00	0.00	0.00	0.01	0.01	0.58	0.01	0.65	1.01	0.31
16 Oil products	0.00	1.95	-0.02	0.67	-0.01	-0.02	-0.04	-0.43	0.02	0.06	-0.17	0.01
17 Electricity	0.00	0.06	-0.35	5.18	-0.30	0.72	0.36	0.13	1.80	0.25	0.22	0.40
18 Minerals	-2.74	0.05	-6.64	0.01	0.67	1.12	-5.52	-0.23	6.20	0.22	0.78	0.22
19 Cement	0.01	1.30	-0.31	1.63	-0.19	-0.10	-0.41	-0.29	0.28	0.41	0.32	0.50
20 Ruminant meat	7.69	0.06	15.24	0.18	-2.14	2.09	17.33	8.23	0.34	8.63	8.60	8.67
21 Other Meat	0.01	5.70	-6.88	3.38	-6.40	-2.04	-8.92	-6.53	0.24	-6.23	-6.26	-6.17
22 Vegetable Oils	0.07	0.13	-0.38	1.04	-0.40	-0.04	-0.42	-3.00	0.00	-2.70	-2.74	-2.65
23 Dairy products	0.07	0.27	0.04	3.03	-0.01	10.92	10.96	1.91	0.89	1.96	1.93	2.01
24 Other prepared Food	153.86	1.64	119.22	9.65	-25.23	20.64	139.86	8.85	3.11	9.06	9.03	9.10
25 Beverages, tobacco products	3.83	3.17	0.44	6.55	-3.09	21.04	21.48	1.55	3.12	1.64	1.60	1.68
26 Textiles	0.08	1.96	-0.18	4.03	-0.07	2.89	2.71	0.77	1.53	0.99	0.91	1.09
27 Wearing	0.48	1.68	0.40	4.55	-0.06	-0.47	-0.07	-0.06	0.13	0.44	0.37	0.55
28 Leather	2.56	0.88	1.72	1.65	-1.03	-0.26	1.46	3.11	0.04	3.55	3.47	3.65
29 Wood and products	0.79	0.38	0.00	1.19	-1.18	0.37	0.37	0.32	0.11	0.76	0.68	0.87
30 Paper & Paper Products	0.00	1.13	-0.78	2.72	-0.48	-0.35	-1.14	-0.50	0.36	0.16	0.09	0.27
31 Chemicals	22.54	2.30	7.13	8.55	-0.17	-1.37	5.76	0.82	1.08	1.39	1.30	1.48
32 Pharmaceuticals	0.00	0.36	-0.12	4.11	-0.03	0.27	0.15	0.18	0.24	0.61	0.52	0.70
33 Rubber and plastics products	0.04	3.66	-0.85	3.63	-0.70	-2.69	-3.54	-1.65	0.33	-1.06	-1.13	-0.95
34 Iron & Steel	0.00	0.85	-0.47	0.11	-0.26	-0.96	-1.43	-1.69	0.14	-0.80	-0.92	-0.73
35 Metal products	60.11	7.98	26.73	3.69	-24.41	-1.44	25.30	2.27	1.62	3.20	3.12	3.30
36 Computer, electronic, optical products	0.16	9.95	-1.58	9.06	-1.07	-6.26	-7.84	-2.92	0.25	-2.39	-2.48	-2.29
37 Electrical equipment	0.03	2.01	-0.93	3.31	-0.25	-1.76	-2.69	-2.50	0.12	-1.89	-1.97	-1.79
38 Machinery and equipment	0.10	10.73	-4.98	6.58	-2.92	-4.34	-9.31	-3.37	0.35	-2.76	-2.83	-2.65
39 Motor vehicles and parts	0.44	12.86	-2.88	14.09	-2.86	-13.33	-16.21	-5.46	0.20	-4.65	-4.73	-4.54
40 Other transport equipment	0.05	0.29	-59.98	0.97	-0.32	-1.90	-61.88	-7.86	0.83	-7.20	-7.27	-7.08
41 Other Manufacturing	0.65	3.14	-2.13	3.75	-0.24	-0.39	-2.52	-1.52	0.12	-0.74	-0.82	-0.64
42 Construction	0.00	0.01	-0.02	0.09	0.00	5.60	5.58	0.51	2.23	1.26	1.59	0.89
43 Trade services	13.81	0.94	-0.62	0.21	-1.70	4.80	4.19	0.10	14.96	0.41	0.75	0.05
44 Land Transport	-0.06	0.00	-0.19	0.03	-0.01	3.09	2.90	0.29	3.15	0.64	1.03	0.33
45 Water Transport	0.00	0.00	-0.03	0.01	0.00	0.03	0.01	0.01	0.22	0.41	0.76	0.06
46 Air Transport	-1.37	0.03	-3.43	0.41	-0.33	-1.34	-4.77	-1.16	1.06	-0.82	-0.47	-1.17
47 Commercial services	1.29	6.68	0.33	8.38	-0.15	16.42	16.76	0.60	12.68	0.85	0.77	0.89
48 Finance services	0.02	5.42	-0.08	5.46	0.00	5.59	5.51	0.44	2.88	0.95	0.83	1.01
49 Public services	-0.67	0.00	-2.33	0.13	-0.06	136.41	134.08	2.09	29.90	2.34	2.28	2.45
Total	272.62	90.99	94.16	126.29	-69.03	257.00	351.16	1.14	100	1.74	1.99	1.30

Source: Simulations by the European Commission; and calculations by the study team. Note: the data for labour represent the total expenditure in the sector for labour = employment times wages.

Table 28: Sectoral impacts in South Africa (€ millions) - Scenario B

Sector	ZAF Exports to EU	ZAF Imports from EU	ZAF Total Exports	ZAF Total Imports	Memo: ZAF Exports to SADC	Domestic Shipments	Total Shipments	Total Shipments % change	Share of Value Added	Value Added % change	Unskilled labour % change	Skilled labour % change
1 Rice	0.02	0.01	-0.77	10.53	-0.40	-4.93	-5.70	-0.24	0.07	0.12	0.11	0.11
2 Wheat	0.00	204.59	-6.09	40.27	-6.62	-33.06	-39.15	-7.42	0.04	-7.56	-6.28	-6.33
3 Other Grains	1.18	0.05	-0.75	1.29	0.81	24.78	24.03	0.84	0.24	1.26	1.29	1.25
4 Vegetables, fruit, nuts	269.68	8.84	364.49	12.13	0.93	30.99	395.48	6.21	0.60	7.06	6.40	6.36
5 Oil Seeds	-0.35	3.28	-0.71	2.79	-0.11	3.10	2.39	0.22	0.08	0.51	0.64	0.60
6 Sugar	190.17	0.21	306.67	12.65	-0.18	58.03	364.70	6.06	0.15	6.63	6.54	6.53
7 Fibres crops	0.02	0.00	-1.44	0.24	-0.09	-0.05	-1.49	-1.59	0.02	-1.53	-1.16	-1.21
8 Other Crops	2.60	5.73	2.31	1.50	0.53	-0.32	1.98	0.96	0.03	1.23	1.26	1.22
9 Cattle	5.04	0.45	3.76	13.58	0.26	255.92	259.68	2.13	1.11	2.57	2.42	2.38
10 Other primary	6.10	0.05	-2.01	0.13	0.00	-17.73	-19.74	-0.52	0.29	-0.29	-0.06	-0.10
11 Forestry	-0.10	-0.03	-0.46	-0.04	-0.07	-10.22	-10.67	-0.60	0.08	-0.40	0.05	0.00
12 Fishing	2.95	0.37	2.29	0.37	0.06	1.05	3.34	0.18	0.21	0.19	0.59	0.54
13 Coal	-12.57	0.00	-134.74	1.37	0.21	62.38	-72.37	-0.40	2.04	-0.27	-1.06	-0.88
14 Oil	-0.01	0.00	-0.12	6.22	0.00	-0.46	-0.58	-1.10	0.01	-1.49	-0.75	-0.79
15 Gas	0.00	0.01	-0.05	25.36	-0.02	-18.76	-18.80	-2.71	0.03	-2.73	-2.31	-2.37
16 Oil products	2.19	4.26	-13.15	39.73	-1.02	76.81	63.66	0.33	0.27	0.85	0.12	0.13
17 Electricity	-0.39	0.96	-20.13	21.01	-8.23	259.00	238.86	0.57	3.96	0.69	0.58	0.60
18 Minerals	-8.93	1.18	-88.51	32.72	6.56	550.26	461.75	0.69	6.30	0.95	1.06	1.01
19 Cement	9.57	142.52	2.20	104.26	-2.16	-60.41	-58.20	-0.80	0.42	-0.44	-0.51	-0.50
20 Ruminant meat	0.34	7.75	-4.26	8.09	-1.11	18.15	13.89	0.37	0.13	0.68	0.67	0.68
21 Other Meat	7.10	218.64	-7.74	141.56	-15.34	-127.96	-135.71	-2.66	0.23	-2.21	-2.22	-2.21
22 Vegetable Oils	3.86	104.24	-1.82	76.46	-0.90	14.14	12.32	0.09	0.78	0.49	0.48	0.49
23 Dairy products	0.04	32.51	1.17	13.85	-0.89	-19.07	-17.90	-2.66	0.01	-1.16	-1.23	-1.23
24 Other prepared Food	187.68	207.73	211.28	94.12	-2.83	-58.18	153.10	3.21	0.56	3.62	3.61	3.61
25 Beverages, tobacco products	101.96	22.77	141.08	31.34	-0.08	25.96	167.04	1.36	0.97	2.07	2.06	2.07
26 Textiles	29.06	170.33	24.78	91.75	-4.87	-80.72	-55.95	-1.23	0.21	-0.62	-0.65	-0.63
27 Wearing	2.39	253.58	-24.17	131.27	-27.90	-86.77	-110.93	-2.97	0.19	-2.39	-2.41	-2.39
28 Leather	28.91	164.64	22.77	74.57	-3.95	-25.05	-2.29	-0.18	0.05	0.37	0.35	0.36
29 Wood and products	1.19	30.22	-4.87	23.05	-2.62	-8.13	-12.99	-0.41	0.21	0.04	0.01	0.03
30 Paper & Paper Products	-1.12	149.55	-40.83	118.36	-7.50	-145.35	-186.19	-1.38	1.11	-0.90	-0.92	-0.90
31 Chemicals	451.31	603.36	367.32	344.03	-14.75	-239.27	128.05	0.63	1.23	1.13	1.07	1.08
32 Pharmaceuticals	1.44	19.94	-10.82	31.62	-0.28	-9.18	-19.99	-0.58	0.21	-0.08	-0.12	-0.10
33 Rubber and plastics products	22.23	551.96	4.64	322.25	-12.86	-226.95	-222.31	-2.89	0.36	-2.32	-2.37	-2.35
34 Iron & Steel	-1.32	121.22	-162.16	112.56	-4.37	118.54	-43.62	-0.26	0.34	-0.02	-0.16	-0.14
35 Metal products	767.11	421.57	645.88	300.60	-20.91	-130.84	515.03	1.07	1.31	1.45	1.39	1.41
36 Computer, electronic, optical products	25.75	803.31	-9.24	303.89	-31.84	-282.70	-291.94	-2.98	0.67	-2.08	-2.10	-2.08
37 Electrical equipment	7.11	62.78	-34.74	89.18	-18.21	-39.84	-74.58	-0.83	0.33	-0.36	-0.38	-0.36
38 Machinery and equipment	51.67	488.67	-52.34	342.48	-27.09	-274.00	-326.34	-2.21	0.20	-1.86	-1.88	-1.86
39 Motor vehicles and parts	3509.48	2966.42	4078.99	1803.04	-19.68	-448.27	3630.72	12.39	1.08	14.59	14.58	14.60
40 Other transport equipment	15.59	-0.26	30.65	-2.69	1.19	5.41	36.06	1.45	0.14	2.73	2.72	2.74
41 Other Manufacturing	28.88	238.05	-158.08	143.62	-10.65	-126.86	-284.94	-2.27	0.42	-1.84	-1.87	-1.86
42 Construction	0.66	4.26	-0.43	3.11	0.00	251.74	251.31	0.60	2.39	1.06	1.09	1.03
43 Trade services	102.44	112.71	55.10	131.75	-1.04	1013.53	1068.64	1.01	12.43	1.18	1.20	1.14
44 Land Transport	-1.78	1.12	-6.44	4.53	-0.05	196.67	190.24	0.68	2.29	0.96	1.11	1.05
45 Water Transport	-0.41	-0.09	-1.03	-0.13	0.00	3.24	2.21	0.25	0.22	0.46	0.59	0.53
46 Air Transport	-5.61	8.86	-25.56	27.08	-0.17	39.16	13.59	0.14	0.34	0.41	0.56	0.50
47 Commercial services	60.54	165.48	60.57	170.96	-2.16	718.53	779.10	0.42	15.90	0.65	0.64	0.65
48 Finance services	18.62	45.56	7.92	72.60	-3.00	411.94	419.87	0.73	6.83	0.86	0.86	0.87
49 Public services	-2.38	2.70	-15.28	15.36	-0.01	1631.16	1615.87	0.69	32.92	0.90	0.89	0.90
Total	5879.93	8352.06	5505.11	5346.35	-243.43	3295.47	8800.57	0.80	100	1.00	1.02	0.96

Source: Simulations by the European Commission; and calculations by the study team. Note: the data for labour represent the total expenditure in the sector for labour = employment times wages.

APPENDIX C: DETAILED ANALYSES RELATED TO THE SOCIAL IMPACT OF THE EPA

Appendix C1: Social baselines

1. EMPLOYMENT

1.1. European Union

Labour force activity in the EU, i.e., the share of persons at working age (20-64 years) already working or ready to take employment, gradually increased from 74.3% in 2010 to 79.4% in 2022, with a temporary fall in 2020 due to the COVID-19 pandemic. The overall employment rate increased from 67.0% in 2010 to 74.8% in 2022. In absolute terms, the number of persons having a job in the EU increased from 178.7 million in 2010 to 197.1 million in 2022, i.e., by 18.4 million. By gender, labour activity rates recorded a gap narrowing from 14 percentage points in 2010 to 10.8 in 2022, with women recording lower rates than men (the labour force activity among women increased from 67.3% in 2010 to 74.0% in 2022, and among men from 81.3% in 2010 to 84.8% in 2022) (EUROSTAT, Labour Force Survey, no date; European Commission, 2022g).

The chance of having a job increases with the education level. E.g., the share of persons with tertiary education who had a job increased from 81.9% in 2010 to 84.8% in 2019, while among persons having at most lower-secondary education this share increased from 51.8% in 2010 to 55.1% in 2019. This means that only around half of them work (EUROSTAT, 2022b; EUROSTAT, Labour Force Survey, no date).

The unemployment rate fell from 10.1% in 2010 to 6.1% in 2022. The risk of being unemployed was related *inter alia* to the education level. While among persons with tertiary education the unemployment rate fell from 5.7% in 2010 to 4.2% in 2019, among persons with at most lower-secondary education, unemployment was around three times higher and fell from 16.4% in 2010 to 13.5% in 2019 (EUROSTAT, Labour Force Survey, no date; European Commission, 2022g). The long-term unemployment rate also decreased. Youth unemployment fell from 25.0% in 2014 to 14.4% in 2022. The share of young people not being in employment, education, or training also kept falling, from 15.4% in 2010 to 11.7% in 2022 (EUROSTAT, Labour Force Survey, no date; European Commission, 2016; 2021a; 2022; 2022g).

Sector-wise, employment in agriculture declined from 5.2% in 2010 in total employment to 3.5% in 2022 (in absolute terms, from 9.6 million people to 6.9 million). In manufacturing, diverse trends can be observed, with employment reductions in some labour-intensive sectors, such as textiles, apparel and leather, and increases in sectors such as automotive (from 2.6 million to 2.9 million) or pharmaceuticals (from 694,000 in 2010 to 914,500 in 2022). In services sectors, employment increased in professional services (from 8.6 million in 2010 to 11.4 million in 2022), and information and communication (from 5.1 million to 7.4 million); in both cases recording an increase in its share in total employment by one percentage point (EUROSTAT, Labour Force Survey, no date).

In addition to the overall positive trend in the EU labour market observed over the last decade, there are risks and opportunities influencing the current and future employment. These include the use of new technologies, such as automation and artificial intelligence, as well as digitalisation of the economy. They drive job creation in services sectors, notably information and communication, as well as in professional, scientific, and technical areas, providing opportunities for skilled workers. There is also an increasing demand for workers in the health and social care sector given the ageing population. In 2021, labour and skills

shortages were reported in sectors including healthcare and long-term care, software, construction, engineering, and sectors related to green transition. To-date, job losses to automation have occurred mainly in manufacturing, with the automotive sector employing most robots. However, as the abilities and the use of robots and AI increase, they are likely to replace workers in other tasks, including administrative and data analysis, among others (European Commission, 2018; 2022g).

Moreover, as is discussed in the section on working conditions (section 3), some changes in the organisation of work (such as the development of digital platforms and other non-standard forms of work) contribute to the polarisation of jobs towards high- and low-paid ones, with offers in the middle shrinking. While they may offer flexibility, they may also create welfare-related challenges around income levels and social security payments (European Commission, 2018). In 2017, the EU adopted the European Pillar of Social Rights, a policy agenda with 20 principles grouped around equal opportunities and access to the labour market, fair working conditions, social protection, and inclusion. A related Action Plan sets out concrete actions and targets in those areas, including a goal of 78% of the EU population aged 20 to 64 being in employment by 2030 (European Commission, no date c). Moreover, since 2019 the EU has adopted a series of policy commitments linked to the European Green Deal and related policy papers, which set out a vision and proposals for action to reduce the environmental footprint, strengthen research and innovation, support competitiveness of the European industry, embed the principle of circularity in the economy, and others. Each of these has the potential to shape demand for jobs and skills in the years to come: According to estimates in the New Industrial Strategy, application of the circular economy principle may create 700,000 jobs in the EU by 2030 (European Commission (2020e).

Trade may also contribute to job creation or maintenance. In 2019, extra-EU exports of goods and services supported 38 million jobs in the EU, i.e., 18% of the total employment. This included 22 million jobs in manufacturing, 14 million in services sectors and 1.5 million in the primary sector. Two aggregate sectors contributed two thirds of those jobs, i.e., manufacturing of machinery and transport equipment (30% of the total) and transport, trade, and business services (34%). Moreover, when the share of export-supported jobs in total employment in the sector is considered, some sectors, e.g., textiles and chemicals, turn out to be more export-oriented than the others. In 2014, 43% and 46% of their jobs, respectively, were supported by exports. Export-related EU jobs also offered higher wages (by 12%, on average in 2019). Moreover, through global value chains, extra-EU exports supported a further 24 million jobs in other countries in 2019 (Kutlina-Dimitrova, Rueda-Cantucho, 2021).

1.2. Botswana

Labour statistics in Botswana have changed over time; for 2011, they provide data on the employed population in absolute numbers and only for employment in the formal sector, which means that the available data are partial. Accordingly, employment in the formal sector increased from 409,920 persons in 2011 to 486,379 in 2022, i.e., by 76,459 persons. At the same time, data for 2022 note that this type of employment accounted for 67.7% of all employed persons in 2022 (Statistics Botswana, 2015; 2022). The earliest available data regarding total employment are from 2015-2016. The labour force participation rate decreased from 61.3% in 2015-2016 to 59.7% in 2022, while the unemployment rate increased from 17.7% to 25.4% in the same period, and the share of employed persons to the total population aged 15 years and more fell from 50.5% to 44.5% (Statistics Botswana, 2017; 2023). In 2022, public administration provided the largest share of employment (18.3%), followed by wholesale and retail trade (17.5%), agriculture (9.5%), education (8.1%), manufacturing (7.1%), administrative and support services (6.2%), and three sectors having each a 4.3% share, i.e., accommodation and food services, human health and social services, and domestic service (Statistics Botswana, 2023).

At the beginning of the period under review, the World Bank (2014) and later the UN Economic Commission for Africa (UNECA) noted a mismatch between the economic structure in Botswana and social needs. While large shares of GDP (19.1% in 2019), budget revenues (45%) and exports (92%) were concentrated in capital-intensive sectors such as diamond and metal mining, this sector provided only 1.8% of the total employment in 2022 (World Bank, 2014; UNECA, 2020; Statistics Botswana, 2023). This was considered as one of the possible reasons for persistent high unemployment rates. To address it, Botswana has prepared National Development Plans focusing on the diversification of the economy. Another identified problem was a relatively low quality of education outcomes, with an increasing number of people having completed secondary education but struggling to find a job. At the time, employers were looking for graduates with tertiary education and those having vocational training, as well as persons having transferable skills, such as communication, teamwork and problem solving (World Bank, 2014). A similar diagnosis was repeated in the 2021 National Employment Policy, according to which the private sector in Botswana does not generate enough jobs to absorb new entrants to the labour market and this contributes to keeping the unemployment rate high, notably among young people (33.5% in 2022, with the rate of those not being in education, employment or training reaching 39.9% in 2022). On the other hand, those having employment were mostly men, non-poor, non-youth and having higher education levels than the working age population on average. The Policy proposed economic diversification, with more jobs to be created in manufacturing and services, modernisation of agriculture, improved access to funding, an improved business environment and infrastructure, as well as reforms in education and vocational training (Republic of Botswana, 2021; Statistics Botswana, 2023).

Botswana's economy has also suffered from the impacts of the COVID-19 pandemic affecting the travel and tourism sector and linked sectors, such as retail trade and accommodation and food services; in 2019, travel and tourism contributed 12.6% to Botswana's GDP and 10.9% to its employment, providing 92,300 jobs. All of these sectors are labour intensive and represent an important employment source for women. It also means that the pandemic has had a disproportionately negative effect for women's economic empowerment (UNECA, 2020; Republic of Botswana, 2021).

1.3.Eswatini

In Eswatini, between 2007 and 2016 the share of working age people (15 years and more) being economically active remained almost the same (51.0% in 2007 and 50.6% in 2016). The unemployment rate fell from 28.0% to 23.0% in the same period, while employment increased from 37.2% of the age group to 39.0%. Regionally, in 2016 the highest employment rate was recorded in Hhohho (44.6%) and the lowest one (30%) in Shiselweni, while the unemployment rate was the lowest in Hhohho (20%) and highest in Lubombo (28.6%) (Central Statistical Office Eswatini, 2016). Since then, Eswatini has faced the challenge of a persisting high unemployment rate, which increased from 23% in 2016 to 33% in 2021 (UN, 2021). Unemployment among young people has been even higher and increasing to 54.8% in 2017 (UNECA, 2019). Agriculture (with small-holding farms) remains the main employer, with a 69% share in total employment in 2016, only 2 percentage points lower than in 1991. The share of manufacturing declined from 13% in 2005 to 10% in 2016 (partly due to the closure of textile and pulp factories in 2005 and 2008, with the related job losses). The remaining 20% of employment are divided among trade, public administration, and traditional services, including education, community services and health care. The share of other services, like financial services or ICT has been very low (UNECA, 2019; ILO, 2010).

Low skills levels (with insufficient access to and a low completion rate of secondary education, notably technical and vocational), high labour costs compared to outputs and a low level of connectivity and digital skills discourage investment and job creation. Many male workers from Eswatini migrate to South Africa to work in the mining sector. However,

as employment in mines is reduced over time, this has an impact on job opportunities for them (BTI, 2022). Women are more likely to be in vulnerable jobs, with 28% (compared to 12% among men) acting as own-account workers in 2017 (UNECA, 2019). A study analysing the quality of the national technical and vocational education system in Eswatini found numerous weaknesses including the lack of coordination between the education establishments and industry regarding curriculum development, the lack of updates in curricula to ensure that knowledge and skills acquired by the graduates keep pace with technology development, the lack of quality assurance in the system, and a focus mainly on basic skills in the analysed sectors (automotive, ICT, and electrical engineering) (SEPARC, 2018).

1.4. Lesotho

During the period under review, Lesotho has implemented two consecutive Decent Work Country Programmes with the ILO (2012-2017 and 2018-2023). Given the country's small size and dependence on trade and South Africa, the recently low performance of the neighbour has had an impact on employment and growth prospects in Lesotho. In 2014-2015, out of the economically active people, 67.2% worked and 32.8% were unemployed in the first quarter. The proportion changed towards 74.5% and 25.5% in Q4, with the number of persons being economically active increasing from 873,500 to 975,520 (Bureau of Statistics Lesotho, 2018).¹⁷ In 2019, the number of economically active persons fell to 672,711 (a labour force participation rate of 49.9%). In this group, the proportion of employed and unemployed persons was 77.5% to 22.5%, i.e., slightly better than in 2014-2015. However, given the lower total number of economically active persons, the number of employed persons was also lower than previously, falling from 727,180 at the end of 2014-2015 to 521,445 in 2019, i.e., by 205,735. The unemployment rate among young people (15-35 years) was higher (29.1%) than average (Bureau of Statistics Lesotho, 2019a).

By sector, at the end of 2014-2015, 30.4% worked in agriculture, 10.2% in manufacturing, 9.7% in construction, 9.6% in households, including domestic service, 8.2% in wholesale and retail trade, 6.4% in mining, 5.9% in other services, 4.8% in education and smaller shares in other sectors (Bureau of Statistics Lesotho, 2018). 24.3% of adults aged 15-49 years were infected with HIV, which represented the second highest rate in the world, and a risk for country's social and economic development. The skills mismatch between supply and demand on the labour market, as well as an overall low level of completed education (many young people drop out of school before acquiring skills which would allow them to find a job) represent another challenge to address. Against this background, job creation, notably for young persons has become one of the priority areas for action in the Decent Work Country Programme (ILO, 2018).

1.5. Mozambique

In Mozambique, the rate of economic activity remained high in the period under review, increasing from 91.8% in 2004/2005 to 93.6% in 2021. The employment rate increased from 74.6% to 83.7% in the same period (INE, 2004; 2021). According to other sources, those indicators are lower, and the participation rate was 79% in 2015 and the employment to working age population ratio (i.e., the absorption rate) 62%. Moreover, the workforce in Mozambique represents overall a low education level, notably among women, who often drop out of the system after primary school. In 2016, 83% of those who worked were either own-account workers or non-paid contributing family members (the other categories being employers and employees) which suggests a high level of informality and vulnerable employment. The unemployment rate was estimated to be 22%

¹⁷ There are only two quarterly reports (for Q1 and Q4) available for 2014-2015 and there is no annual report for that time. For this reason, the figures provided above refer separately to Q1 and Q4.

and among young people, 38%. However, the real figures may be higher as unemployment or underemployment may be hidden in subsistence agriculture and casual jobs in the informal economy. Over the last two decades, around three quarters (77% in 2001 and 75% in 2016) of people in Mozambique worked in agriculture, 4% in industry and the remaining 19% in 2001 and 21% in 2016 in services (DTDA, 2017).

The overall low level of skills means a lack of candidates for medium- and high-skilled jobs from managers and administrative jobs to technical professions, such as engineers. This also makes it more difficult for the economy and people to progress from subsistence agriculture to other sectors and jobs (DTDA, 2017). Other sources suggest, however, that even the few university graduates have been facing challenges in the labour market and it is easier for them to get a job in the public sector, e.g., in education or health care, rather than in the private sector. If they get one, the jobs are usually below their qualifications (around half not even requiring a university degree) and with a low wage. Among those interviewed for a study conducted in 2017-2019, 23% did not have a job 18 months after graduation. This suggests a mismatch between young people's choices and the academic curriculum on one hand and the market demand, on the other. However, there is also a possibility that the economy does not create enough semi-skilled and high-skilled jobs to absorb new entrants (Jones, Santos, Xirinda, 2019).

1.6. Namibia

In Namibia, the labour force participation rate increased from 66% in 2012 to 71.2% in 2018. The unemployment rate also increased in the same period, from 27.4% to 33.4%, and the absorption rate, i.e., the number of employed compared with the size of the working age population, slightly decreased from 47.9% to 47.4%. In absolute terms, the number of employed persons increased from 630,094 in 2012 to 725,742 in 2018 (i.e., by 95,648) and the number of unemployed persons from 238,174 in 2012 to 364,411 in 2018 (i.e., by 126,237) (Namibia Statistics Agency, 2013; 2019). Agriculture has remained the main employer, providing 31.4% of total employment in 2013, with a share decreasing to 23% in 2018. It was followed by wholesale and retail trade (15.3% in 2013 decreasing to 11.1% in 2018). While accommodation and food services provided 5.4% jobs in 2013, this share increased to 11.4% in 2018. Also, employment in manufacturing increased from 4.8% to 6.2% (Namibia Statistics Agency, 2014; 2019).

At the beginning of the period under review, a disproportionately high share of growth was generated by capital intensive sectors such as mining, which offered only 2% of the total employment. In addition, an insufficient number of jobs was created by other sectors, and in rural areas few (if any) employment alternatives to subsistence farming existed. As a result, the unemployment rate was high, and most unemployed persons (72.2%) remained without a job for at least two years. The relatively low education level in the workforce was also considered as a contributing factor to long-term unemployment. At the time, there was an emerging consensus on the need to invest more in labour-intensive sectors, such as tourism, transport, or livestock production, to improve the business environment and support the move from the informal to the formal economy (Kanyenze, Lapeyre, 2012). The consecutive National Employment Policy editions did not bring about the expected changes as they were not aligned with the National Development Programme and the responsibility for their implementation was not well-defined between the government ministries. As a result, promoting employment creation has become one of the priority areas for action under the Namibia Decent Work Country Programme 2019-2023 (ILO, 2019). In 2017, Namibia adopted its 5th National Development Plan foreseeing investment in education and training among the areas for action in order to improve the employability of current and future workers (Republic of Namibia, 2017).

1.7. South Africa

The labour force participation rate in South Africa increased from 54.1% in 2011 to 56.9% in 2022. However, the employment rate (compared to the population, i.e., the absorption rate) decreased from 40.6% to 37.3% in the same period, and the unemployment rate increased from 25% to 34.5%. In absolute terms, the number of employed persons increased from 13.1 million in 2011 to 14.9 million in 2022, i.e., by 1.8 million, while the number of unemployed persons almost doubled from 4.4 million in 2011 to 7.9 million in 2022. Trade was the main employer in 2011, with a share of 22.6% in total employment (falling to 20.1% in 2022). Community and social services were the next sector, increasing to the largest one in 2022, with a share of 21.5% increasing to 23.8%. These were followed by industry (13.7% falling to 10.6%), financial and business services (12.4% increasing to 15.6%), private households, including domestic service (8.5% falling to 7.2%) and construction (7.8% falling to 7.2%) (Statistics South Africa, 2012; 2022).

Research on the labour market in South Africa (IMF, 2016) highlights high unemployment levels and factors, such as previous work experience, gender, age, and race as playing an important role in getting or losing a job (women, young people, the black community, and persons without prior job experience faced more challenges in getting a job and were among the first ones to lose it).¹⁸ A higher education level and working in a sector where trade unions are present offers more job stability. Moreover, for persons without work experience it is easier to get an informal job which could serve as a stepping stone towards formal employment. Another research paper by the IMF (2021) analyses the reasons for high unemployment in South Africa and suggests reforms that could address the problem. These include investment in education and entrepreneurship, access to finance for SMEs, changes in minimum wage setting and collective bargaining and transport costs. A long-term analysis of the South African market and factors influencing it also suggests that a relatively small group of high-skilled workers receives disproportionately high wages compared to the rest (largely low-skilled labour force). On the other hand, increases in minimum wages for low-skilled workers have improved their economic situation but have also negatively affected job creation, while wages of those in the middle of the scale have remained unchanged for a long time (Mncayi, 2021). More recently, the South African economy and labour market suffered from the negative effects of the COVID-19 pandemic, which caused additional job losses and discouraged workers from job search (UNECA, NKC African Economics, 2021).

2. CONSUMERS¹⁹, POVERTY, AND INEQUALITY

2.1. European Union

The available evidence identifies diverse groups in the EU either living in poverty or facing a risk of poverty and social exclusion. Accordingly, in the EU, employment does not always protect from poverty. The share of those working and being in poverty increased from 8.5% in 2010 to 9% in 2019. Workers on temporary contracts are more likely to be in that situation than those having permanent contracts (16.2% and 5.9% respectively), low-skilled workers compared to high-skilled ones (19% compared to 4.9%), and workers born outside the EU compared to EU citizens (European Commission, 2022). The total share of persons being at risk of poverty and social exclusion decreased from 24.7% in 2012 to 21.7% in 2021, being higher among women (22.7%) compared to men (20.7%). Across

¹⁸ Initial findings related to impacts of the COVID-19 pandemic on the South African labour market indicated that the same groups were more affected than others (Ranchhod and Che Daniels, 2021).

¹⁹ Data related to wages are provided in the section on working conditions below. The analysis related to the availability, accessibility and safety of goods and consumer expenditures is provided as part of the impact analysis in the main body of the report.

Member States in 2021, it ranged from 10.7% in the Czech Republic to 34.4% in Romania (European Commission, 2015a; EUROSTAT, 2022c).

The risk of poverty and social exclusion has been higher in certain groups, including families with children (notably single parents), persons with disabilities, persons born outside the EU, and the Roma community. In 2021, 22.5% of the EU population living in families with dependent children faced that risk. Moreover, while 11.1% of working people were at risk of poverty and social exclusion in 2021, the corresponding rate was 18.6% among retired persons, 64.5% among unemployed, and 42.3% among other inactive persons. The level of completed education also played a role. While around 10% of persons with a high education were at risk of poverty and social exclusion, this rate was 34.8% among persons having a low level of completed education (EUROSTAT, 2022c). Social transfers in EU Member States helped to reduce the risk of poverty and social exclusion by about one third, while their effectiveness ranged from 16% to 50% (European Commission, 2022).

Children are more exposed to this risk than adults. Moreover, the available evidence shows that children growing up in poverty and social exclusion are less likely to perform well at school and to realise their full potential later in life. In 2021, the Council of the EU adopted a Recommendation on the European Child Guarantee. It foresees providing children in need with access to basic services, including free early childhood education and care, free education (with at least one healthy meal a day), free healthcare, healthy nutrition, and adequate housing (European Commission, 2022; 2022g; no date b).

Due to their situation on the labour market and the need to rely on other income sources, persons with disabilities in the EU belong to the groups most exposed to the risk of poverty or social exclusion, with a rate of 28.4% in 2019 compared to 18.4% of people with no limitations in activity, i.e., a gap of 10 percentage points. Moreover, it is estimated that 68.0% of persons with disabilities in the EU would have been at risk of poverty in 2019 if no social benefits had been provided (EUROSTAT, 2021).

While minimum wages have been raised by many EU Member States in the period under review, they remain low compared to other wages in the economy and have been losing real value most recently against the background of increasing energy and food prices (European Commission, 2022g). In October 2022, the Council of the European Union adopted a Directive on adequate statutory minimum wages, which provides for procedures for setting and updating minimum wage levels. It also promotes collective bargaining in relation to wage setting and supports access to the minimum wage for workers who have such a right based on national legislation. The latter should be facilitated by awareness raising among workers and labour inspections (Council of the EU, no date).

Energy poverty has also been increasing. It is defined as a situation in which energy bills take a large share of a consumer's income or when the household's energy consumption must be reduced to such a degree that this has a negative impact on people's health and well-being. In 2018, it was estimated that 6.8% of the EU population (30.3 million) were unable to pay their utility bills timely, including energy bills. Moreover, 7.3% of the population (37.4 million) experienced uncomfortable temperatures in their homes (European Commission, 2020f). The EU has taken several measures to address this problem. Energy poverty has been included into the legislative package adopted in 2019 (Clean energy for all Europeans). Based on this, the Electricity Directive, and the Energy Performance of Building Directive, EU Member States need to estimate the scale and address energy poverty on their territory. In 2020, the Commission adopted a Recommendation providing a list of indicators related to energy poverty and suggested the use of EU funds to tackle this problem (European Commission, 2020f). In 2021, it published a Communication suggesting initiatives that can be taken at the national level to help the most vulnerable consumers and in 2022, it established an energy poverty and

vulnerable consumers coordination group to offer the EU Member States a forum to exchange good practices and coordinate actions (European Commission, no date d).

Moreover, further to the outbreak of the COVID-19 pandemic affecting disproportionately some sectors (e.g., hospitality, air transport, and arts, and entertainment) and worker groups, Member States applied measures such as monetary compensation schemes, and reduction in taxes and social security payments to stabilise incomes in the population (European Commission, 2021b).

2.2. Botswana

The share of people living in poverty (at below USD 2.15 a day) decreased from 29.1% in 2002 to 17.7% in 2009 and 15.4% in 2015. In absolute terms, this corresponds to a decrease from 520,000 to 360,000 persons living in poverty. While job creation, agricultural subsidies and social transfers helped reduce poverty in early 2000s, the lack of a similar employment dynamic in the 2010s and a severe drought in 2015 slowed down the previous trend. More recently, the COVID-19 pandemic is estimated to have contributed to a poverty increase to 16.0%. While the economy bounced back in 2021 and the poverty rate may have fallen to 14% in 2022, a recent slowdown in economic growth, a higher inflation rate and the lack of wage increases in the private sector may negatively affect the poverty reduction trend. Across the population, a higher poverty incidence has been recorded among people living in rural areas, children, persons over 65 years of age, unemployed, economically inactive, and persons without any completed education. While differences in poverty across regions have been decreasing, higher levels have been recorded in North-West and Ghanzi and lower ones in the South-East and North-East (World Bank Group, 2015; World Bank, no date a). When multidimensional poverty is considered, which includes access to health care and education and living standards, Botswana scores low on living standards, notably on access to electricity and sanitation (UNDP, 2023; World Bank, no date a).

The Gini coefficient²⁰ fell from 60.5 in 2009 to 53.3 in 2015, indicating a reduction in inequality. However, Botswana remains one of the most unequal countries in the world (World Bank, no date a). Income inequality in Botswana has been slightly decreasing, with the share of 10% top earners falling from 65.9% in 2010 to 59.3% in 2021 and the share of the bottom 50% group increasing from 6.5% in 2010 to 8.1% in 2021 (World Inequality Database, no date).

2.3. Eswatini

The share of people living in poverty (at below USD 2.15 a day) decreased from 56.1% in 2000 to 49.3% in 2009 and further to 36.1% in 2016. In absolute terms, this means a decrease over the whole period from 580,000 to 410,000 persons living in poverty. An improvement in educational attainment, the extension of social protection coverage and labour incomes are among factors that have contributed to the initial poverty reduction. While the poverty rate fell further to 32% in 2022, the economic slowdown, inflationary pressures with an increase in food and energy prices, the lack of formal job creation, overreliance on employment in the public sector and low productivity sectors such as subsistence agriculture, the low performance in agriculture and the food processing sector, and a high HIV rate among adults may have a negative impact on reducing poverty further. Additional challenges are posed by the country's vulnerability to external economic shocks (related to a high dependence on economic developments in South Africa) and natural

²⁰ The Gini coefficient is a measure of statistical dispersion intended to represent an income or wealth distribution among the residents of a given country or region and is the most commonly used measure of inequality. Zero expresses perfect equality, where all values are the same (e.g., everyone has the same income) and 1 (or 100%) maximal inequality among values (e.g., one person has all the income or consumption, and all others have none).

disasters, including droughts (while its agriculture and sugar cane cultivation depend on water supply). A higher poverty incidence has been recorded among people living in rural areas, children, persons over 65 years of age, and persons without any completed education or with a completed primary education (World Bank, no date b; World Bank, 2020a; World Bank, 2023). Regionally, higher poverty rates have been recorded in the rural regions Lubombo and Shiselweni (World Bank, 2020a). When multidimensional poverty is considered, Eswatini has lower scores on living standards, notably on access to sanitation and electricity (UNDP, 2023a; World Bank, no date b).

The Gini coefficient increased during the period under review, from 53.1 in 2000 and 51.4 in 2009 to 54.6 in 2016, which suggests a limited increase in inequality after an initial fall (World Bank, no date b). This is confirmed by data related to income inequality: The share of 10% top earners increased from 57.6% in 2010 to 59.8% in 2021 and the share of the bottom 50% group fell from 8.8% in 2010 to 7.8% in 2021 (World Inequality Database, no date).

2.4. Lesotho

The share of people living in poverty (at below USD 2.15 a day) decreased from 66.3% in 2002 to 32.4% in 2017.²¹ In absolute terms, in 2017 700,000 people lived in poverty (there is no corresponding figure for 2002). In 2023, the poverty rate is estimated at 33.9%. Also, according to the Bertelsmann Foundation (2022a), an estimated 75% of the population are either poor or vulnerable. Initially, poverty reduction was related to employment and wage increases in urban areas and improvements in educational attainment. On the other hand, rural poverty remained around the same level over time due to decreasing remittances from migrants working in South Africa and fluctuating yields affected by weather conditions, notably the El Niño effect. Moreover, employment opportunities in rural areas remain limited, as is access to services and infrastructure, further limiting growth opportunities. Stagnation of the textile industry in Lesotho and South Africa's poor economic outlook may also have negative impacts on further poverty reduction (World Bank, 2019; World Bank, no date c). By region, over the period 2002 to 2017 poverty fell in four out of six regions in Lesotho, while it increased in two rural ones, i.e., Rural Mountains, and Rural Senqu River Valley. Moreover, across the population, above-average poverty rates have been recorded among women-led households, larger families, children, the unemployed and persons with a lower level of educational attainment (World Bank, 2019). When multidimensional poverty is considered, Lesotho has lower scores on living standards, notably on access to electricity and sanitation (UNDP, 2023b; World Bank, no date c).

The Gini coefficient decreased from 51.6 in 2002 to 44.9 in 2017, which means a reduction in inequality over time (World Bank, no date c). This has been confirmed by data related to income inequality. The share of 10% top earners decreased from 52.2% in 2010 to 49.5% in 2021 and the share of the bottom 50% group increased from 10.3% in 2010 to 11.3% in 2021 (World Inequality Database, no date).

2.5. Mozambique

The share of people living in poverty (at below USD 2.15 a day) decreased from 80.6% in 2002 to 70.8% in 2008 and further to 64.6% in 2014. However, due to population growth, the absolute number of people living in poverty increased from 15.1 million in 2002 to 16.8 million in 2014. While no detailed recent data are available, the current poverty rate is estimated at around 60%. The initial poverty reduction was driven mainly by the services sector and growing domestic consumption. While the services sector may return on the growing path in the next two years, there are other challenges, such as delays in

²¹ According to another source, poverty fell from 56.6% in 2002 to 49.7% in 2017 (World Bank, 2019).

investment projects in the liquified natural gas (LNG) sector caused by instability in the Cabo Delgado region, tropical cyclones and other weather conditions affecting agricultural output, gender inequality in access to education and economic activity, the overall low level of education and skills among people and the macroeconomic instability due to the volatility of commodity prices and a reduction of budget support by some partners. Across the population, higher poverty levels have been recorded in rural areas, among children, and persons without completed education (World Bank, 2023a; World Bank, no date d). Moreover, higher poverty levels have been recorded in the regions of Zambezia, Nampula and Niassa, while Maputo City and Maputo Province have witnessed the lowest and still declining levels of poverty (World Bank, 2018a). When multidimensional poverty is considered, Mozambique scores low on the level of educational attainment and on living standards, notably access to sanitation and water (UNDP, 2023c; World Bank, no date d).

The Gini coefficient increased from 47 in 2002 to 54 in 2014, which suggests an increase in inequality (World Bank, no date c). This has been confirmed by data related to income inequality. The share of 10% top earners increased from 58.6% in 2010 to 64.6% in 2021 and the share of the bottom 50% group decreased from 10.2% in 2010 to 8.3% in 2021 (World Inequality Database, no date).

2.6. Namibia

The share of people living in poverty (at below USD 2.15 a day) decreased from 35.9% in 2003 to 15.6% in 2015. In absolute terms, their number decreased from 690,000 to 360,000 in the same period. This was related to an expansion of the social protection system, an increase in labour incomes and improvements in educational attainment. Since 2015, poverty has increased to 20.2% in 2020 and slightly fallen to 19.4% in 2022. The contributing factors included a fall in commodity prices, weaker trade flows and demand, high unemployment, the effects of the COVID-19 pandemic, a slow recovery afterwards and economic growth driven mainly by the low-employment mining sector. Moreover, while the recently higher food prices may have raised incomes of rural households engaged in agriculture, they are likely to have negatively affected people living in urban areas. Additionally, high prices of fertilisers may have had a negative impact on farmers' profits (World Bank, no date e). Overall, across the population, higher poverty rates, including multidimensional poverty, are more likely in rural areas, in women-led households, in households speaking Khoisan, Rukavango and Zambezi languages, in larger families, and among children and persons with no completed education or with only primary school completed. By region, the highest poverty rates have been recorded in Kavango West, Kavango East and Kunene and the lowest in Erongo and Karas (World Bank, no date e; UNDP, 2021a). When multidimensional poverty is considered, Namibia has lower scores on living standards, notably on access to sanitation and electricity (World Bank, no date e).

The Gini coefficient decreased from 63.3 in 2003 to 59.1 in 2015, meaning a reduction of inequality over time (World Bank, no date e). This has been confirmed by data related to income inequality: The share of 10% top earners decreased from 68.4% in 2010 to 64.2% in 2021 and the share of the bottom 50% group increased slightly from 6.1% in 2010 to 6.5% in 2021 (World Inequality Database, no date).

2.7. South Africa

After an initial reduction of the poverty rate, from 28.3% in 2005 to 18% in 2010, it increased again to 20.5% in 2014. The number of people living in poverty followed a similar trend, falling from 13.9 million in 2005 to 9.3 million in 2010, and rising again to 11.2 million in 2014. The lack of recent progress in poverty reduction has been related to slow economic growth, a poor business climate, low job creation, the duality of the labour market (with a small share of well-paid formal jobs and informal precarious jobs at the other end), inequality in access to jobs, high unemployment, high food prices, the energy

crisis, and additional effects of the COVID-19 pandemic. Across the population, higher poverty rates have been recorded in rural areas, women-led households, large families, among Black South Africans, children, unemployed and persons with only primary school or with no completed education (World Bank, 2018; World Bank, no date f). By region, the highest poverty rates have been recorded in Eastern Cape, KwaZulu-Natal, and Limpopo and the lowest ones in Gauteng (World Bank, 2018). When multidimensional poverty is considered, South Africa has lower scores on living standards, notably on access to sanitation (UNDP, 2023d; World Bank, no date f).

While the Gini coefficient decreased from 64.7 in 2005 to 63.0 in 2014, suggesting a slightly lower degree of inequality (World Bank, no date f), this has not been confirmed by trends in incomes. While the income of the top 10% earners in South Africa accounted for 46.3% of the total income in 1993, it increased to 61.4% in 2010 and further to 65.4% in 2021. On the other hand, the share of the bottom 50% earners decreased from 13.7% in 1993 to 7.9% in 2010 and further to 5.8% in 2021 (World Inequality Database, no date).

3. WORKING CONDITIONS, INCLUDING OCCUPATIONAL SAFETY AND HEALTH²² AND ENFORCEMENT (LABOUR INSPECTION)²³

3.1. European Union

Between 2015 and 2020, the EU witnessed a significant increase of new forms of work, going beyond standard job contracts. These include, e.g., ICT-based mobile work (with part of the time spent outside the office), platform-based work, casual work (temporary or intermittent work with irregular working hours), job sharing and employee sharing. The COVID-19 pandemic has played a significant role in the rise of working from home, with the challenges and opportunities it brings (European Commission, 2022). While the share of platform work in total employment is still limited (1.4% of EU workers named it as the main activity in 2018), it has increased rapidly. Between 2016 and 2020, the total income of people working through digital platforms increased from €2.6 billion to €6.3 billion, and the revenues of parties involved in platforms increased from €3 billion to €14 billion over the same period. To date, 28 million people in the EU worked at some point in their career through a digital platform. Services offered through platforms include ride-hailing, delivery of goods, and cleaning and repair services, all of which are delivered on-site, and services fully delivered online (e.g., encoding, translation or design). Initially, platform services increased mainly through passenger transport, but in 2020 (due to the COVID-19 pandemic) delivery services gained in importance. While the profile of platform workers depends on the platform type, most of them are young men with higher qualifications. Women are more often involved in personal, household and care-related services. Self-employment remains the prevalent form of engagement of individual service providers with platforms (90% of platforms operating in the EU work in this way). While most of these persons are genuinely self-employed, developing their own businesses, around 5.5 million persons working through digital platforms are in false self-employment and should be classified as employees. For them, the current arrangement raises questions about their job quality, rights, and social security coverage (European Commission, 2020a; 2022; 2022g). In 2021, the Commission proposed a package of measures related to work through digital platforms, including a Directive on improving working conditions in platform

²² Given very limited information regarding occupational safety and health in the SADC EPA States, we provide information related to this area and the two new ILO fundamental conventions (No. 155 and 187) here, as part of the job quality (working conditions) and not in a separate, dedicated section.

²³ In this section, we also provide information about work of labour inspection and implementation of the ILO convention No. 81, given its importance for implementation and enforcement of labour legislation and standards.

work (the Council adopted its position on it in June 2023). Moreover, in 2019-2021 several Member States adopted national measures in this area (European Commission, 2022g).²⁴

The proportion of temporary workers to all employees remained relatively stable, decreasing from 14.2% in 2015 to 13.1% in 2022.²⁵ However, there are large differences between EU Member States, with shares of temporary workers extending from around 2% in Estonia to almost 25% in Spain. Poland, Finland, Italy, Portugal, and the Netherlands have shares from around 15% to over 20%. Member States having overall high shares of temporary workers also reported the most significant drop in their numbers during the COVID-19 pandemic, reflecting the higher vulnerability of those jobs to contract termination or non-renewal. Temporary workers also more often face challenges in access to training, career advancement, job security and decision autonomy. They are also three times more likely to be at risk of poverty than those with permanent contracts (16.3% compared to 5.8% in 2017). This type of contracts has higher shares among women, young people, non-EU born citizens and low-skilled workers. In 2021, 48.9% of young people had temporary contracts, compared to 11.9% in the group aged 25-54 years and 6.2% in the group aged 55-64 years. Also, 19.2% of low-skilled workers had temporary contracts (European Commission, 2022; 2022g; 2020a; 2016a). By occupation, higher shares of temporary contracts in 2020 were registered among agricultural labourers (52.7%), farmworkers and gardeners (25.8%), food preparation helpers (25.4%), cleaners and helpers (18.4%), care workers (21.4%), personal service workers (19%), construction workers (17.8%), legal and social associate professionals (23.2%), and customer clerks (16.2%) (CEDEFOP, no date).

Since 2008, the number of part-time jobs increased substantially; however, it started slightly decreasing since 2016 (being at 19.2% in 2018 and 17.2% in 2021). Again, there are significant differences between Member States, with the share of part-time jobs being below 5% in Bulgaria, Slovakia, Romania, Croatia, and Hungary, and reaching almost 40% in the Netherlands, with Austria and Germany being at around 30%. Moreover, the share of involuntary part-time jobs (i.e., people working part-time although willing to have a full-time job) in all part-time jobs declined from 29.6% in 2014 to 23.9% in 2021. Women tend to work more often part-time than men (28% compared to 8% in 2021) and mothers compared to fathers (40.5% compared to 5.7% in 2014) (European Commission 2022; 2022g; 2020a; 2016a; EUROSTAT, no date a).

Self-employed persons without employees account for 9.8% of employment in the EU (25.7 million people in 2022). In some cases, this hides a de facto employee-employer relationship to circumvent labour law provisions related to minimum wages, working hours, collective agreements, income tax and social security payments (European Commission, 2022; 2022g; 2020a).

While minimum wages have been raised by many EU Member States in the period under review, they remain low compared to other wages in the economy and have been losing real value most recently against the background of increasing energy and food prices (European Commission, 2022g). In October 2022, the Council of the European Union adopted a Directive on adequate statutory minimum wages which provides for procedures for setting and updating minimum wage levels. It also promotes collective bargaining in relation to wage setting and supports access to minimum wage for workers who have such a right based on national legislation. The latter should be facilitated by awareness raising among workers and labour inspections (Council of the EU, no date).

²⁴ Council of the EU: EU rules of platform work: <https://www.consilium.europa.eu/en/policies/platform-work-eu/>

²⁵ The share of temporary workers remained in the spectrum of 13% to 15% since 2009 until 2021 (EUROSTAT, no date a).

Regarding working time, a full-time employee in the EU worked on average 37.1 hours a week in 2019. This time decreased to 36.4 hours in 2021. At the same time, the largest share (38.4% of all workers) had a working week of 40-42 hours, but 27.9% working less than 35 hours, and 17.7% working 35 to 40 hours. Smaller groups worked longer (e.g., 7.9% for more than 50 hours). By sector, the longest working hours in 2021 were reported in agriculture (41.7 hours per week), followed by mining (39.6), construction (39.2), transport (38.5), and manufacturing (37.9), while the shortest were in education (32.2) and domestic service (26). By working arrangement, the longest working hours were reported by self-employed persons having employees (46 hours), followed by self-employed without employees (39.3) (EUROSTAT, 2022). The latest evidence also suggests that, while the increasing popularity of remote working contributes to workers' well-being and work-life balance, it is also related with a higher risk of working long hours (European Commission, 2022g).

Regarding health and safety at work, there were 1.77 fatal accidents per 100,000 workers in 2020, and 1,444 non-fatal ones, also per 100,000 workers. Regarding fatal accidents, the construction sector had the highest share in the total (21.5%) in 2020, followed by manufacturing (15.2%), transportation and storage (15%), and agriculture (11.4%). Regarding non-fatal accidents, manufacturing reported the highest share (18.6%) in 2020, followed by health care and social services (15.1%), construction (12.7%), wholesale and retail and repair of motor vehicles and motorcycles (12.4%) (EUROSTAT, 2022a).

All EU Member States have ratified the ILO priority convention No. 81 on labour inspection. Moreover, regarding two new ILO fundamental conventions on occupational health and safety (No. 155 and 187), by August 2023, convention No. 155 has been ratified by 16 EU Member States (Belgium, Croatia, Cyprus, Czech Republic, Denmark, Finland, Hungary, Ireland, Latvia, Luxembourg, the Netherlands, Portugal, Slovakia, Slovenia, Spain, and Sweden), while 15 EU Member States have ratified convention No. 187 (Austria, Belgium, Cyprus, Czech Republic, Denmark, Finland, France, Germany, Greece, Luxembourg, Portugal, Slovakia, Slovenia, Spain, and Sweden).

3.2. Botswana

The labour survey²⁶ includes data related to wages, and accordingly, an average wage for salaried employees increased from BWP 4,746 in 2011 (about €497) to BWP 7,809 in 2022 (about €600). In 2011, the highest average monthly salaries (BWP 12,479) were in financial services, followed by water and electricity supply (BWP 10,461), mining (BWP 9,868), education (BWP 8,535), and health care (BWP 8,132), and the lowest in agriculture (BWP 1,187), accommodation and food services (BWP 2,026) and manufacturing (BWP 2,924). In 2022, the set of sectors on the high end of the scale changed, and the highest salaries were in mining (BWP 20,387), financial services (BWP 16,856), information and communication (BWP 14,774), gas and electricity supply (BWP 11,913), education (BWP 11,875) and professional services (BWP 11,662), while the lowest were in domestic services (BWP 1,539), agriculture (BWP 1,987), accommodation and food services (BWP 2,931). Salaries in manufacturing increased to BWP 5,316 (Statistics Botswana, 2015; 2022).

As of 2020, there was no mandatory pension scheme in the country and the voluntary one was estimated to cover less than 20% of employees (ILO, 2020a).

In 2022, 8.0% of all employees (or 55,320 persons) were under-employed, i.e., worked for less than 35 hours a week, even though they were ready to work full-time. The largest

²⁶ It is likely that data refer to the formal economy and salaried employees with permanent contracts.

group of the total (65.5%) worked in public administration, 11.6% in education and 6.6% in agriculture (Statistics Botswana, 2022).

In 1997, Botswana ratified ILO convention No. 176 (safety and health in mines). In the context of that convention, the Government informed that all mines are inspected by mine inspectors, and these provide advice to mining operators on measures to take to prevent accidents at work (CEACR, 2018). On the other hand, Botswana has not ratified yet ILO conventions No. 155 and 187 on occupational safety and health.

In 2022, Botswana ratified ILO convention No. 81 (labour inspection) and No. 129 (labour inspection in agriculture). The number of labour inspectors decreased from 55 in 2014 to 53 in 2018, but the number of inspections conducted at workplaces increased from 1,378 in 2014 to 2,113 in 2018 (however, the latter does not cover Q1 of 2018) (US Dep. of Labor, 2014; 2019).

3.3.Eswatini

Very little data is available regarding working conditions in Eswatini. In 2022, a new Decent Work Country Programme (2022-2025) with the ILO was adopted. While it usually provides an overview of the labour market and social situation and serves as a good data source, this one has not been published yet (ILO, 2022).

In 2019, 32% of the population in the country was covered by the social protection system. In 2021, the National Social Security Policy and its Implementation Plan were adopted by the Cabinet. Another milestone would be a transformation of the current Eswatini National Provident Fund into a pension scheme (ILO, no date a). In May 2023, members of the tripartite Labour Advisory Board reached an agreement on addressing this issue in a legislative reform (Zwane, Phungwayo, 2023). Currently, the National Provident Fund and Workmen' Compensation Fund pay lump sums to workers providing short-term support; therefore, they are not adequate as a long-term solution for the time of retirement. The National Security Policy includes the objective of establishing a comprehensive social security framework and extending types of benefits and their coverage, to include maternity, child, disability, and sickness benefits (ILO, no data a).

Eswatini has ratified ILO convention No. 81 on labour inspection. In 2022, the Government submitted a regular report, however, the ILO Committee of Experts has not published any comments. In this situation, the latest observations come from 2013 (the Government failed to submit its reports in the meantime). At the time, the Committee of Experts noted that no annual report on the operation of the labour inspection had been provided since 2005 and that already in 2005 (as part of an assistance project), the ILO provided advice regarding strengthening the labour inspection system. The Committee also noted the Government information that labour inspectors were able to conduct inspections based on complaints only due to the lack of transportation means (while new cars had been purchased, they were grounded due to cash flow problems). That said, the number of inspections increased from 2,866 in 2009 to 3,548 in 2010. In the reporting period, there was one inspection campaign in the apparel sector (however, it is not clear if it covered the above-mentioned numbers or not). Moreover, while new inspectors had been hired, more posts were needed due to the increasing number of workplaces liable to inspection (CEACR, 2013). In 2015, there were 30 labour inspectors and that number decreased to 20 in 2016 (US Department of Labor, 2016), and to 15 in 2017. It remained at that level until 2019. The number of inspections fell from 2,278 in 2018 to 1,580 in 2019 and the labour inspection budget decreased from over USD 1 million in 2018 to USD 900,000 in 2019. Inspectors continued to face challenges related to insufficient resources, including the lack of vehicles (US Department of Labor, 2019).

Eswatini has not ratified yet conventions No. 155 and 187 (occupational safety and health).

3.4. Lesotho

In 2014-2015, 43.3% of employed persons in Lesotho had a written contract, 37.9% had a verbal contract, and 16.5% did not have a contract (the rest did not know). Out of those who had a contract, 32% had a permanent one, 14.1% a short-term one for less than 12 months, 15.2% a fixed-term one for longer than 12 months, and the rest had a contract without a specified duration. Regarding working time, 26.2% of employed persons worked for 41-50 hours a week, 19.3% worked for 51-60 hours a week, 19.9% for more than 60 hours, and the rest for less than 40 hours (Bureau of Statistics, Lesotho, 2018).

In 2018, Lesotho did not have a mandatory contributory pension scheme which meant that most of the working population did not have this type of a coverage. Moreover, other social security mechanisms were considered as outdated, costly, and not well targeted. In 2021, the World Bank prepared their review with recommendations. Access to social protection has also become one of three priorities in the Decent Work Country Programme with the ILO (ILO, 2018; World Bank, 2021).

In reporting to the ILO, Lesotho informed that the tripartite National Advisory Committee on Labour had discussed and approved the ratification of the ILO fundamental convention No. 187 (health and safety at work) and the National Advisory Committee for Occupational Safety and Health had requested a workshop on that convention (CEACR, 2021). Lesotho ratified convention No. 187 in 2023 and No. 155 in 2001²⁷ (ILO NORMLEX, no date). In 2022, the ILO Committee of Experts noted the adoption of the Occupational Safety and Health (OSH) Policy in 2020 by Lesotho and plans to adopt an OSH Act. The new Policy envisages that workers representatives should participate in identification of hazards and risk assessment related to their workplace. On the other hand, the Committee of Experts noted that while the Labour Code foresees financial penalties or imprisonment (or both) for employers violating OSH provisions, in practice they would only get a warning and be asked to remedy the situation. The Committee requested the Government to ensure an effective application of sanctions in cases of labour law violations (CEACR, 2022).

Lesotho has ratified convention No. 81 on labour inspection. However, its last report due in 2021 has not been submitted yet. The latest ILO comments are from 2016. At the time, the Government informed about an insufficient number of labour inspectors and resources (office equipment and transport means). While it had plans to strengthen the available capacities, their implementation remained dependent on budget to be allocated by the Ministry of Finance. Moreover, the annual report on labour inspection activity has not been provided since the ratification of the convention in 2001 (CEACR, 2016). The number of labour inspectors fell from 38 in 2014 to 27 in 2021 and the number of labour inspections decreased from 1,330 in 2014 to 940 in 2021 (US Department of Labor, 2014a; 2021d).

3.5. Mozambique

The minimum wage for salaried employees in the formal sector has been negotiated in the tripartite Labour Advisory Commission every year and set separately for different sectors. For example, the lowest minimum wage (for agriculture) increased from MZN 1,486 in 2009 (about € 39) to MZN 3,642 in 2017-2018 (€51), while the highest one was in financial services and increased from MZN 2,758 to MZN 10,400; in manufacturing, it went up from MZN 2,300 to MZN 5,965. However, trade unions observed that given an inflation rate higher than the salary increase, the workers' purchasing power had decreased.

The labour legislation envisages a maximum 6-day working week. In 2012, 21% of workers worked for 40-48 hours a week (i.e., close to limits established by the law), while

²⁷ Lesotho has also ratified ILO convention No. 167 on safety and health in construction (ILO, NORMLEX, nd).

25% worked for more than 49 hours, 9% for 35-39 hours and almost a half (46%) for less than 34 hours, which is defined underemployment (DTDA, 2017; ILO, 2009).

The tripartite Labour Advisory Commission has discussed at its meetings ILO conventions No. 155 and 187 on the occupational safety and health (not ratified yet) and convention No. 176 on safety and health in mines (ratified in 2018) (CEACR, 2023; 2021). In 2019, Mozambique adopted new legislation related to safety and inspection in mining activities and started amendment of the Mining Act and Safety Regulations. Moreover, it established specialised inspection services for the mining industry (CEACR, 2022).

Mozambique has ratified ILO convention No. 81 on labour inspection. In 2022, the ILO Committee of Experts noted an insufficient number of inspectors compared to the number of workplaces to visit and difficulties in conducting inspections, notably in remote places, due to problems with transport means (when inspectors used their own vehicles for work-related purposes, costs had not been reimbursed). Moreover, inspectors had additional tasks, such as trade union registration, assessments of the legality of trade union documents, checking the status of migrant workers, and dispute settlement. The Committee observed that labour inspectors should be relieved from duties that may interfere in trade union activity, while other tasks (such as dispute settlement) should not be defined in a way to impede the primary duty of labour inspectors, i.e., enforcement of labour laws (CEACR, 2022).

3.6. Namibia

Data regarding working conditions, notably the type of contract, have been provided for 62% (427,920 persons out of 690,019) employed in 2013 and 62.2% (451,701 persons out of the 725,742) employed in 2018. Out of those, 58.7% had a permanent contract in 2013 (decreasing to 53.8% in 2018), 11.7% a contract of a limited duration (increasing to 13.5% in 2018) and the rest had a contract without a specified duration.

The mean monthly wage for the whole economy increased from NAD 6,802 in 2013 (about €530) to NAD 7,935 in 2018 (€509). By sector, in 2013 the highest wages were in transport and communication (NAD 18,139) and the lowest ones in domestic work (NAD 939) and agriculture (NAD 2,509). In 2018, the highest wages were in financial and insurance activities (NAD 20,459) and the lowest ones in the domestic work (NAD 1,387), accommodation and food services (NAD, 2,819) and agriculture (NAD 3,393) (Namibia Statistics Agency, 2013; 2019).

In 2019, most of the working age population in Namibia was excluded from the social security coverage (ILO, 2019).

Namibia ratified ILO convention No. 81 on labour inspection in 2018 and submitted its first report to the ILO, indicating the ongoing work on the inspection policy (CEACR, 2023). The number of labour inspector decreased from 73 in 2013 to 52 in 2020, while the number of inspections conducted at workplaces increased from 1,981 in 2013 to 2,582 in 2020. The budget of labour inspection services increased to USD 2.8 million (US Dep. of Labor, 2013a; 2021a). In 2022, 57 (out of 61) labour inspector roles were filled and there were further 54 vacancies for which budget was missing. Regarding occupational safety and health, 25 out of 28 roles were filled while further 20 vacancies remained without a secured budget. For the mining sector, there was a Chief Inspector of Mines and six safety and health inspectors. While there is an intention to conduct inspections every year in each workplace, based on plan, complaints and concerns regarding an individual sector or geographic area, there are difficulties in delivering towards such an objective due to limited resources. Moreover, penalties for the violation of safety and health provisions were considered as too low (around USD 120) and not serving as a deterrent (CEACR, 2023).

Namibia has not ratified yet conventions No. 155 and 187 (occupational health and safety).

3.7. South Africa

The share of employed working 40-45 hours a week remained almost the same between 2011 and 2022²⁸ (55.0% and 54.5% respectively), while the group working for 45 hours and more decreased from 30.6% in 2011 to 27.3% in 2022. The remaining group worked for less than 40 hours, and there was a slight increase among those working for 30-39 hours (from 6.9% to 7.2%) and 15-29 hours (from 5.7% to 7.0%). Moreover, between 2011 and 2022, the share of respondents having a written contract increased from 80.3% to 82.1% (the rest had a verbal agreement). On the other hand, the share of workers with a permanent contract in this group decreased from 64.4% to 60.9% and the group having a contract of a limited duration increased from 13.0% to 14.5% (the rest had a contract not specifying duration). In the same period, the share of workers contributing to pension scheme remained at 47% (although in absolute terms, the group increased by 600,000 persons) and the share of those having income tax deducted from their salaries remained at 54.7% (this group increased by 751,000 people) (Statistics South Africa, 2012; 2022).

South Africa has ratified ILO convention No. 155 (occupational safety and health), with the next Government report due in 2023 and the latest ILO comments being from 2016. In those, the Committee of Experts urged the Government to adopt the new Occupational Safety and Health legislation given that the review of the existing one was on the agenda for over a decade (CEACR, 2016).

South Africa has also ratified the labour inspection convention No. 81. Further to the ILO audit in 2010 and a set of recommendations, the inspection service was transformed into a stand-alone branch in the Department of Labour, its budget was increased between 2011 and 2016, and changes such as training for inspectors and improved terms of work were considered to attract and retain professional staff. Later on, inspection services faced the challenge of a reduced budget and a shortage of qualified occupational safety and health inspectors, leading to outsourcing these services to external bodies that were not well-regulated (ILO, 2018a). That said, overall, the number of labour inspectors increased from 1,542 in 2013 to 1,853 in 2021 and the number of inspections carried out at workplaces increased from 101,792 in 2013 to 296,904 in 2021.²⁹ Labour inspection budget increased from USD 45 million in 2020 to USD 47 million in 2021 (US Dep. for Labor, 2013; 2021c).

4. LABOUR STANDARDS – CHILD LABOUR³⁰

4.1. European Union

While the total share of persons being at risk of poverty and social exclusion decreased from 24.7% in 2012 to 21.7% in 2021 (European Commission, 2015a; EUROSTAT, 2022c), that risk has been higher in certain groups, including families with children (notably single parents), persons with disabilities, persons born outside the EU and the Roma community. In 2021, 22.5% of the EU population living in families with dependent children were at

²⁸ The 2011 survey covered 11 million out of 13.5 million workers and the 2022 one covered 12.4 million out of 14.9 million workers.

²⁹ According to data from the ILO Committee of Experts report, the number of inspectors decreased from 1,452 in March 2015 to 1,412 in March 2019, while the number of inspections increased from 181,548 in 2014 to 218,919 in 2018 (CEACR, 2021). Therefore, while both sources coincide regarding an increase in the number of inspections, there are divergencies regarding trend and the number of inspectors.

³⁰ According to the approach set out by the ILO, child labour is a matter of concern and subject to elimination, when it means an economic activity which interferes with child's physical or mental development, prevents it from attending school, forces it to leave the school early or makes it difficult to combine the school attendance with long working hours, thus not allowing for having enough time for rest or leisure activities, which are adequate for the age and the stage of personal development. Moreover, child labour is often considered as such when children below the minimum age for admission employment work (the minimum level is often set at 14 years) or when persons under 18 years of age do the hazardous work.

that risk (EUROSTAT, 2022c). Social transfers in EU Member States helped to reduce the risk of poverty and social exclusion by ca. one third while their effectiveness ranged from 16% to 50% (European Commission, 2022).

Children are more exposed to this risk than adults. Moreover, the available evidence shows that children growing up in poverty and social exclusion are less likely to perform well at school and to realise their full potential later in life. In 2021, the Council of the EU adopted a Recommendation on the European Child Guarantee. It foresees providing children in need with access to basic services, including free early childhood education and care, free education (with at least one healthy meal a day), free healthcare, healthy nutrition, and adequate housing. Member States have been asked to develop action plans to implement this Recommendation (European Commission, 2022; 2022g; no date b).

Also in 2021, the Commission published the EU Strategy on the Rights of the Child. It covers six areas for action: 1) child participation in political and democratic life, 2) socio-economic inclusion, health, and education, 3) combating violence against children and ensuring child protection, 4) child-friendly justice, 5) digital and information society and 6) global dimension. In the latter, the Commission committed, e.g., to working (through legislative initiatives and corporate due diligence) towards value chains of EU companies being free from child labour and to providing technical assistance to strengthen labour inspection's capacity to monitor and enforce legislation prohibiting child labour (European Commission, 2021d; 2021h).

In 2022, the Commission tabled a proposal for a Directive on corporate sustainability due diligence according to which companies should identify, prevent, and mitigate any negative impacts of their activity on human rights, incl. child labour (European Commission, 2022a). Also in 2022, the Commission and the International Trade Centre prepared guidance for designing support measures for due diligence (European Commission, ITC, 2022). The EU has also informed about a new initiative on ending child labour in global value chains. It will select a few sectorial value chains where child labour is prevalent in the countries of origin and in which their trade with the EU is significant. The activities will start with pilot projects and include multi-stakeholder initiatives. Moreover, 10% of development aid in 2021-2027 is directed to education, considered as one of the measures helping reduce and eliminate child labour (European Commission, 2022h).

Other measures taken by the EU in the context of children's rights in external relations include, e.g., child safeguard standards developed for organisations that implement assistance projects, with the aim of protecting children from countries and communities where the projects are implemented, from any related harm by the staff or project management (Keeping Children Safe, no date). In 2013, the Staff Working Document on trade and the worst forms of child labour was published which analyses the root causes of child labour and the ways of addressing them in the context of trade relations (European Commission, 2013a). In 2017, the Council of the EU adopted Guidelines for the Promotion and Protection of the Rights of the Child in the EU external action, in cooperation with partner countries and other actors (EU Guidelines for the Promotion..., 2016). All EU MS and all SADC EPA States have ratified the ILO fundamental conventions No. 138 and 182, thus committing to eliminate child labour and its worst forms.

4.2. Botswana

There is no recent data available regarding the number or the rate of children engaged in child labour or its worst forms. In 2005, 9.0% of children aged 7-17 years (i.e., 38,375 persons) worked, most of them (24,902 persons) in rural areas. In a geographic breakdown, the highest rate (14.0%) was reported by Central Serowe/Palapye and Central Tutume, while Central Bobonong, with 6.6% was on the other end of the scale. In a breakdown by sector, 62.5% worked in agriculture, 22.1% in retail trade and 4.1 % in domestic work (Statistics Botswana, 2008). In 2008, the country adopted the Action Programme

towards the elimination of child labour in Botswana 2008-2012. According to data presented there, 82,396 persons aged 7-17 years were involved in child labour, i.e., 19.3% of the age group, while around 50,000 (i.e., 11.6%) in hazardous work. Around 19.0% of working children did not attend school. Moreover, while 15.0% worked for one to seven hours a week, 28.9% worked for more than 28 hours a week and 16.3% for more than 42 hours a week. The main reason for working quoted by 64.0% was the duty to help the family (Ministry of Labour and Home Affairs, Botswana, 2008).

Areas of concern were identified as excessive household chores which may affect child's development, work in cattle breeding and other parts of agriculture, sometimes in remote areas which may affect access to school, children being used by adults in committing crime or for sexual exploitation, children working in streets, often after dropping out from school, and in retail, incl. in places selling alcoholic beverages without license (Ministry of Labour and Home Affairs, Botswana, 2008). Some parents from rural areas send their children to work in domestic service or at cattle farms which increases their vulnerability to hazardous work and forced labour. For example, children from San minority ethnic group work in the Ghanzi Region on commercial cattle farms and spray the cattle with chemicals to remove insects, while those in the domestic service may suffer from abuse, confinement, and the lack of promised access to education. The reports mention in this context that Botswana has not adopted a list of hazardous types of work prohibited for persons under 18 years of age and has not established the upper age limit for compulsory education. Moreover, in some areas, there are problems with access to schools and there are insufficient materials in minority languages. Also, while all children are enrolled for primary education, at the secondary level, the registration requires a birth certificate or another identity document and children not having them cannot continue education (US Department of Labor, 2021). The enforcement level of legislation related to child labour is considered as low due to the insufficient capacity of labour inspection, remoteness of rural areas and a low awareness of negative impacts child labour may have (US Embassy in Botswana, 2021). The lessons learned from previous assistance projects indicate a need to engage with leadership of the local communities and raise awareness among farm owners (ILO, 2012). In 2023, the ILO Committee of Experts requested Botswana to ensure that the undertaken review of the Labour Law is used as an opportunity to provide protection for all children, including those working in agriculture, informal economy and as self-employed. The Committee noted that a draft list of hazardous types of work had been included into the proposed revision of the Law. Moreover, a review of the Education and Training Act should be used to set the upper age for compulsory education at 15 years which is the minimum age for admission to work in Botswana. The Government should also ensure an effective implementation of the 2021 National Action Plan for the elimination of child labour and enhance the labour inspection's capacity (CEACR, 2023).

4.3.Eswatini

In 2010, in Eswatini, 42.2% children aged 5-14 years (i.e., below the minimum age for admission to work) were engaged in child labour. In a geographic break-down, its rate ranged from 37.3% in Hhohho to 48.8% in Lubombo and was higher in rural areas (46.4%) than in urban ones (20.1%). Over 90.0% of working children attended school (Central Statistical Office, Eswatini, UNICEF, 2011). In 2021, 8.2% of children of all ages were engaged in child labour and most of that work took place in rural areas (86.1%) compared to 13.9% in urban areas. In this context, in 2023 the ILO Committee of Experts urged the Government to strengthen efforts to combat child labour (CEACR, 2023). In 2014 (more recent data are not available), 88% of boys and 84% of girls completed primary education. However, while out of these, around 85% moved to the secondary school, only 33% of boys and 48% of girls attended classes at the secondary level (school attendance is considered as one of the means helping to reduce and eliminate child labour). Also, 33.2% of children up to 17 years of age lived in conditions where none of the biological parents was present (Central Statistical Office, Swaziland, 2014).

Child labour in Eswatini includes livestock herding, domestic work, selling goods in streets, other work in streets (e.g., car washing), engagement in illicit activities and sexual exploitation (US Department of Labor, 2021b). While the action Programme on Combating Child Labour was prepared in 2008, it has remained in draft since then and has never been adopted. There were internal reviews within the administration every five years, however, the document has not reached the stage of consultations with stakeholders or a discussion in the Cabinet. The Government pledged to adopt a version for 2021-2026 (Government of Eswatini, 2021). In 2023, the ILO Committee of Experts noted that a new Employment Bill had been prepared and includes a list of types of hazardous work prohibited for persons under 18 years of age. The Bill also sets a minimum age for admission to work at 15 years for all workers, including those in the informal economy. On the other hand, the Bill sets a too high threshold for light work, allowing children under the minimum age of admission to employment to work for up to six hours a day or 33 hours per week. The Committee observed that this would not leave time for school attendance, doing homework, having rest or leisure activities. It expressed hope that the Bill would be adopted soon and would consider comments provided by the ILO. The Committee also urged the Government to rise the upper age for compulsory education (now at 12 years, i.e., at the end of primary school) to equal the minimum age for admission to work (15 years). The Committee also noted capacity building workshops for labour inspectors (CEACR, 2023).

4.4. Lesotho

In 2018, in Lesotho, 25.5% of children aged 5-11 years were engaged in child labour, as well as 19.4% aged 12-14 years and 11.5% aged 15-17 years. Child labour in this case has been defined by the number of working hours per week, being above a threshold set separately for each age group (1 hour, 14 hours and 43 hours, respectively). Those involved in child labour often did not attend school, e.g., 39.0% in the age group 12-14 years. Moreover, 70%-80% of surveyed children were involved in household chores. In a geographic break-down, the lowest rates of child labour were recorded in lowlands and the highest in mountains. Regarding activities, 66.0% declared herding animals, 21.2% working on a farm or in a garden, 4.9% helping in family business, and 2.6% selling diverse products. Herding animals involves mainly boys, from an early age, and means spending long periods in remote areas, often without basic services and with exposure to harsh weather conditions (Bureau of Statistics, Lesotho, 2019). While in 2016, 93.8% of children aged 5-14 years attended school, 85.6% managed to complete it. Moreover, while primary education is free, the secondary one includes fees which are prohibitive for many families (US Department of Labor, 2021d).

In 2023, the ILO Committee of Experts noted the work on the second National Action Plan on the Elimination of Child Labour (APEC-II) 2022-2026. Moreover, an Amendment Bill to Labour Code has been prepared which extended the application of the Labour Code and the mandate of labour inspection onto the informal part of the economy. The Committee also noted information regarding labour inspection activity in villages where child labour was high, awareness raising activities related to child labour and the start of operation of helplines where cases of child labour can be reported. Moreover, given that the upper age for compulsory education of 13 years is lower than the minimum age of admission to work (15 years), the Committee asked the Government to rise the former. Finally, it has noted child benefits programme supporting vulnerable families and having as one of objectives to protect children from falling in the worst forms of child labour. In 2019, the programme covered 108,833 children from 38,738 households. In this context, the Committee noted an increase in the number of children who have become orphans due to HIV/AIDS, from 85,000 in 2019 to 110,000 in 2021. They also belong to vulnerable group (CEACR, 2023).

4.5. Mozambique

In 2008, in Mozambique, 22.2% of children aged 5-14 years (i.e., below the minimum age of admission to work) were engaged in an economic activity. In a geographic break-down,

the rate of child labour ranged from 8.9% in Niassa to 39.4% in Inhambane. Child labour was also higher in rural areas (25.3%) than in urban ones (15.1%) (INE, 2009). According to the 2017 census, 662,808 children aged 7-14 years, i.e., 11.1% out of 5.9 million, worked. However, further questions revealed that only 3.1 million were at school in the reference time, while others were looking after younger children, were selling products, helping in family business, or had other reasons for not being at school. This means that at least part of the remaining 2.2 million may have also been engaged in child labour (INE, 2019). Child labour in Mozambique has been related to work in agriculture (cotton and tobacco), illegal mining, selling goods in streets and domestic work. While there is no recent research available about the reasons of child labour, the literature speaks of three of them, i.e., poverty, the lack of basic services (education, health care, or water), notably in rural areas and socio-cultural factors, i.e., parents also working from an early age and a view that children should support their parents and the family, and that work will provide them with an experience useful in the future (ROSC, 2015). Working children have been exposed to risks, such as the use of chemicals, work at night, long working hours, carrying heavy loads, operating dangerous tools, and navigating through the traffic when selling goods in streets (ILO, 2013).

In 2023, the ILO Committee of Experts noted that the Labour Law in Mozambique applies only to the formal economy and so does the mandate of labour inspection. It requested the Government to ensure that protection provided by the ILO conventions is granted also to children working in the informal economy, including in agriculture, and mining and that this activity is monitored by labour inspection. Moreover, the Committee noted results of activities undertaken as part of the National Action Plan to Combat the Worst Forms of Child Labour 2017-2022, e.g., the enrolment of 7,395,512 students in primary education by 2022 (73% of the target), the construction of 1,183 primary education classrooms, benefitting more than 130,000 students (35% of the target), and the provision of school meal programmes for 206,158 students. The Committee observed that these measures benefitted children at the primary education level while it was also important to ensure an appropriate level of attendance and graduation of the lower secondary education, given its role in preventing engagement of children in the worst forms of child labour. In 2017, only 20% of children aged 13-17 attended school. Moreover, the Committee urged the Government to ensure the availability of the latest data on child labour (CEACR, 2023).

4.6. Namibia

The share of children aged 6-17 years engaged in an economic activity decreased from 71.9% in 2005 to 60.8% in 2010, while in absolute terms, their number fell from 408,638 to 324,856. In both cases, the rate of working children was higher in rural areas (86.2% decreasing to 76.2%) than in urban areas (36.4% decreasing to 28.6%). In a regional break-down, in 2010, the rate varied between 11.1% in Hardap and 14.8% in Erongo and 85.9% in Ohangwena, 85.2% in Oshikoto and 84.5% in Omusati. Among working children, in 2010, 85.1% of girls and 83.9% of boys attended school, 5.5% of girls and 5.6% of boys have never done so and 9.1% of girls and 10.3% of boys dropped out of school early. Most of the reported activities included unpaid work in the household or at the family farm or business, such as collecting water and firewood, preparing food, helping on a family plot or at the cattle post. Out of those who named the reason for starting to work, 56.6% were forced to work, 11.3% didn't receive any support from their parents, 9.3% worked due to illness of their parents, 9.1% started working after dropping out of school, while others have lost their parents or needed money for themselves or the family. There was also a group willing to gain experience. At the same time, the data from the survey indicate that around half of working children spent a relatively limited time on work, while around a quarter had to dedicate much time to work. Working hours and type of work also had an impact on their health and school attendance. Given the burden of working hours, 134,599 children were classified as being in child labour, i.e., 41.4% of all those engaged in any economic activity, while 56,459 had difficulties at school due to work. 4,598 were in hazardous work and 7,729 in paid employment (Ministry of Labour, Namibia, 2010).

According to other reports, child labour occurs in agriculture, and domestic work, and children are also engaged in sexual exploitation, criminal activity and selling goods in streets. The reasons include poverty, unemployment among adult household members, drought in rural areas, HIV/AIDS, and the fact that many children became orphaned and need to secure means for living, drought and poverty in Angola and other neighbouring countries (with migrants coming to Namibia) and human trafficking. The education is free at the primary and secondary level, however, children from rural and remote areas and those who became heads of household following parents' death, may not be able to attend school or drop out of the system to work. Moreover, some groups, like ethnic minority San may face a challenge in attending school and the lack of materials in mother tongue (a similar situation like in Botswana) (US Department of Labor, 2021a). In 2021, the ILO Committee of Experts urged the Government to adopt a list of types of hazardous work prohibited for persons under 18 years. The list has been in preparation since 2011 (CEACR, 2021).

4.7. South Africa

In South Africa, the number of children aged 7-17 years involved in child labour decreased from 779,000 in 2010 to 571,000 in 2019. The number of children working excessive hours decreased from 417,000 to 320,000 and the number of those who either missed school or experienced another interference of work in the education decreased from 49,000 to 11,000. The number of children engaged in hazardous work decreased from 291,000 to 193,000 and the number of those involved in activities prohibited by the Basic Employment Act decreased from 122,000 to 83,000. The comparison of child labour rate suggests a reduction from 5.2% in 2015 to 5.0% in 2019. In a geographic break-down, the highest rate was recorded in 2015 in Kwa-Zulu Natal (10.0%) and the lowest in Northern Cape (1.2%). In 2019, the ranking was similar, while the rate fell in Kwa-Zulu Natal to 8.4% and in Northern Cape to 0.7% (0.7% was also recorded in Western Cape). Moreover, there were three provinces, where the child labour rate rose in 2019 compared to 2015, i.e., Mpumalanga, Eastern Cape, and Gauteng. In a break-down by sector, in 2010, 58.1% of working children were active in trade (46.5% in 2019), 12% in private households (19.7% in 2019) and the rest in other sectors (the survey explained that due to the small number of persons per sector in other sectors, it was not possible to show more granular data). Half of working children did so to raise own money, while around one third to support their family's budget (Statistics South Africa, 2021).

During the period under review, South Africa implemented the 4th edition of the National Child Labour Programme of Action (2017-2021). Moreover, given the increasing number of orphans caused by HIV/AIDS (1.4 million children under 17 years of age in 2019) and other vulnerable children, the Government in cooperation with the National Association of Child Care Workers rolled out a five-year intervention programme of prevention and care for children with the aim to support them in achieving adequate school outcomes, and skills development and to create job opportunities for young people. The programme has benefitted over one million children. Another programme has provided financial assistance to vulnerable children to support them in progression to higher education or technical and vocational education and training (CEACR, 2021).

5. LABOUR STANDARDS – FORCED LABOUR

In this section, the analysis focusses on forced labour, in line with the definition adopted by the ILO in fundamental convention No. 29.³¹ According to it, forced labour means any type of work or service which is exacted from any person under a threat of a penalty and

³¹ Forced Labour Convention, 1930 (No. 29): https://www.ilo.org/dyn/normlex/en/f?p=NORMLEXPUB:12100:0::NO::P12100_ILO_CODE:C029

for which that person has not offered themselves voluntarily. This will help to avoid confusion, as in the literature, forced labour cases are sometimes defined in a way equal to informal work or work in precarious conditions. Moreover, the ILO has elaborated a list of forced labour indicators helping to identify forced labour cases. These include abuse of vulnerability, deception, restriction of movement, isolation, physical and sexual violence, intimidation and threats, retention of identity documents, withholding of wages, debt bondage, abusive working and living conditions, and excessive overtime (ILO, no date b).

While forced labour may take different forms, including cases related to human trafficking, and sexual exploitation, some cases may be linked to international trade, e.g., occur in sectors producing for exports. Also, while addressing forced labour remains a competence of domestic authorities and their enforcement agencies (e.g., police, border police, labour inspection, prosecution, and courts), trade policy may support directly or indirectly fight against it. For example, companies may be requested to conduct due diligence along their supply chains to ensure that forced labour is not used by themselves and their suppliers. Also, given that forced labour may affect in particular vulnerable groups of workers (e.g., migrant workers, people living in poverty, women, or children), a situation in which a trade agreement supports job creation for such workers, may help them get a genuine job and avoid bogus job offers or falling into debt which, in turn, may sometimes lead to falling into a trap of forced labour. Moreover, in addition to job creation, further measures should be taken to address the root causes of vulnerabilities exposing people to the risk of forced labour. These include poverty reduction, investment in education and skills development, gender equality and awareness raising related to the risk of forced labour, and workers' rights.

5.1. European Union

In the EU, the Victims' Rights Directive entered into force in 2015. It lays down a set of rights for victims of all crimes and the corresponding obligations of EU Member States.³² Other elements of policy and legislative framework, which are related to forced labour, include the Directive (2011) on preventing and combating trafficking in human beings and protecting its victims³³, and the consecutive EU Strategies towards the Eradication of Trafficking in Human Beings 2012-2016 and 2021-2025 (European Commission, 2012; 2021e). They recognise a need to cooperate with the private sector as an essential element in reducing the demand for trafficking in human beings and developing supply chains which are "trafficking-free". In the context of the first Strategy, the Commission, in cooperation with Eurofound³⁴, developed the best practice guide for labour market intermediaries and the role of social partners in preventing trafficking in human beings for the purpose of labour exploitation.

In 2017, the Commission published a Communication about the follow-up to the 2012-2016 Strategy. Acknowledging that the majority of trafficking victims are women, it named the main causes of trafficking, including poverty, discrimination, gender inequality, male violence against women, and the lack of access to education, with the resulting low level of skills. Moreover, factors influencing the situation in countries outside the EU, such as war and conflict, triggered a migration wave which, in turn, exposed many people to the risk of human trafficking. The Communication also outlined three priority areas for action 1) stepping up the fight against organised criminal networks including by disrupting the business model and untangling the trafficking chain, 2) providing a better access to and

³² Directive 2012/29/EU establishing minimum rights, support, and protection of victims of crime, and replacing Council Framework Decision 2001/220/JHA.

³³ Directive 2011/36/EU of the European Parliament and of the Council of 5 April 2011 on preventing and combating trafficking in human beings and protecting its victims and replacing Council Framework Decision 2002/629/JHA. The Directive creates legal obligations on businesses, namely the liability and sanctioning of legal persons for trafficking in human beings' offences (Article 5).

³⁴ Eurofound: the European Foundation for the Improvement of Living and Working Conditions

realising the rights of victims of trafficking, 3) intensifying a coordinated and consolidated response, both within and outside the EU (European Commission, 2017b, 2019b).

According to the 2021-2025 Strategy, 14,145 victims of trafficking were recorded in EU27 in 2017-2018, while the number was likely to be a significant underestimation. EU citizens represented almost a half of all victims, while women and girls accounted for 72% of the total³⁵, and children for 25%. 60% of victims were trafficked for sexual exploitation. While progress has been achieved in the prosecution and conviction of perpetrators and the identification of victims, further efforts were needed, in particular in the follow-up to the COVID-19 pandemic which had exacerbated social inequalities and people's vulnerability and hindered the victims' access to justice (European Commission, 2021e). According to the 2022 report on progress made in Strategy's implementation, in 2019-2020, 14,311 trafficking victims were identified in the EU which means almost the same number as in preceding two years. Likewise, as before, this may be a significant underestimation of the real scale of the problem, in particular that during the COVID-19 pandemic, sexual exploitation moved to flats and online space and became more difficult to detect. The share of women and girls among victims fell to 63%. EU citizens accounted again for half of all victims (53%), the top five countries being Romania, France, Italy, Bulgaria, and Poland. Regarding non-EU citizens, most victims originated in Nigeria, China, Moldova, Pakistan, and Morocco. The report also emphasised that the military conflict in Ukraine, which resulted in a large emigration of Ukrainian women and children to the EU, may have contributed to exposing vulnerable refugees to activities of organised crime networks, including those involved in human trafficking (European Commission, 2022j).

According to the same report, the number of human trafficking cases related to labour exploitation has increased to 28% of the total in 2019-2020, from 15% in 2017-2018 and 14% before. In this group, men represent a majority of victims (66%), however, the share of women has been increasing. The main sectors of labour exploitation are characterised by a high cash flow, a large number of low-paid workers and seasonal workers. They include agriculture, construction, forestry, food processing, assembly lines, hospitality, retail, carwashes, beauty and cleaning services, transportation, housekeeping, and domestic assistance. This form of exploitation dominates in Belgium, Italy, Latvia, Luxembourg, Malta, Poland, and Slovakia (European Commission, 2022j; 2012).

In 2022, the Commission published a proposal for a Corporate due diligence Directive and a proposal for a Regulation on prohibiting products made with forced labour on the EU market (European Commission, 2022a; 2022c). Also in 2022, the Commission published a proposal for a Directive on preventing and combating trafficking in human beings and protecting its victims. Its objective is to strengthen tools available to enforcement agencies and judiciary in investigating and prosecuting cases of human trafficking. For example, using knowingly services of human trafficking victims becomes a criminal offence and the mandatory sanctions in cases related to human trafficking can be imposed on companies, not only on individuals. The new rules should also help improve the procedures for an early identification of and support to victims (European Commission, 2022i). When adopted, the new Directive would update the currently applicable Directive of 2011³⁶.

According to the Global Slavery Index 2023,³⁷ in the EU, the number of people living in conditions of slavery ranged from 209,000 in Poland to 4,000 in Denmark. Moreover, some

³⁵ According to data from the 2012-2016 Strategy, 76% of victims were trafficked for sexual exploitation and the rest for labour exploitation (14%), forced begging (3%) and domestic servitude (1%). Women and girls accounted for 79% of all victims. Most victims were from the EU, mostly Romania, Bulgaria, Poland, and Hungary. Most non-EU victims originated in Nigeria, Vietnam, Ukraine, Russia, and China (European Commission, 2012).

³⁶ Directive 2011/36/EU of the European Parliament and of the Council of 5 April 2011 on preventing and combating trafficking in human beings and protecting its victims, and replacing Council Framework Decision 2002/629/JHA: <https://eur-lex.europa.eu/legal-content/en/TXT/?uri=CELEX%3A32011L0036>

³⁷ [Walk Free 2023: https://www.walkfree.org/global-slavery-index/](https://www.walkfree.org/global-slavery-index/)

Member States, including the Netherlands, Sweden, Portugal, Croatia, Belgium, France, and Spain, are among countries that have developed a national response against modern slavery, including adoption of a dedicated legislation. Also, all EU Member States have ratified ILO fundamental conventions No. 29 and 105 on elimination of forced labour and 19 of them have ratified the 2014 Protocol to the convention No. 29³⁸.

5.2. Botswana

Botswana has ratified ILO conventions No. 29 and 105 on forced labour (however, has not ratified yet the 2014 Protocol). In 2023, the ILO Committee of Experts noted a low rate of the identification of victims, and prosecution and conviction of perpetrators. On the other hand, it noted adoption of the Anti-Human Trafficking National Action Plan 2018-2022 and work of the National Human Trafficking (Prohibition) Committee (CEACR, 2023). Botswana authorities have also conducted awareness raising campaigns about risks of forced labour and the identified victims of trafficking have been referred to care and shelter (US Dep. of State, 2022a).

Forced labour and child forced labour cases have been reported in Ghanzi province in cattle herding. Reportedly, labour inspection services do not have resources to visit the province where private farms employ adults and children in exploitative conditions. The situation affects mainly the San minority and is aggravated by the fact that school enrolment in Botswana requires a birth certificate, while children from this minority do not always have it. They are therefore forced to work instead of attending school (Verité, no date a; US Dep. of State, 2022a). Moreover, poverty forces some parents to send their children to domestic work where they may also face forced labour conditions, such as confinement, denial of promised access to education and verbal, physical or sexual abuse. Likewise, poverty and pressure from relatives may push children and adults to work in conditions of sexual exploitation. Traffickers target unemployed women, the rural poor, agricultural workers, children, and economic migrants from other African countries being in transit to South Africa (US Dep. of State, 2022a).

At the same time, Botswana has been classified together with Lesotho and Mauritius as the three African countries hosting the lowest number of people living in conditions akin to modern slavery. In Botswana, their number has been estimated at 4,000 in total and 1.8 person for each 1,000 of inhabitants. While actions of the authorities have been scored relatively high (63%) for national and regional coordination, the government and business activity to address forced labour in supply chains have been scored at zero (other activities scored between 32% and 54%)³⁹ (Walk Free, 2023). In 2015-2016, 30 persons (in total), victims of human trafficking were identified in Botswana. Most of them (22) were from Malawi, and the rest from Ethiopia, Somalia, Tanzania, Zambia, and Zimbabwe (UNODC, 2017). In 2021, 31 victims of human trafficking were identified (US Dep. of State, 2022a).

5.3. Eswatini

Eswatini has ratified ILO conventions No. 29 and 105 on forced labour (however, has not ratified yet the 2014 Protocol). In 2023, the ILO Committee of Experts noted that the new draft Employment Bill includes prohibition of forced labour, however, its provisions should be further aligned with convention No. 29, including on the need to establish penalties for using forced labour at a level high enough, so that they serve as punishment and deterrent helping to eliminate such practices. The Committee requested the Government to regulate the customary practice of rendering services to the local chief or the King which has been enforced with punitive measures if someone refused to provide them. According to the

³⁸ ILO NORMLEX database:

https://www.ilo.org/dyn/normlex/en/f?p=1000:11300:0::NO:11300:P11300_INSTRUMENT_ID:3174672

³⁹ The only countries having higher scores (13%) for actions taken to address modern slavery in supply chains were Ghana, Cote d'Ivoire and DRC (Walk Free, 2023).

Committee, provision of work or services should be voluntary, and the legislation should determine how this type of work is organised (CEACR, 2023).

There are reports of an increased vulnerability of textile and garment sector workers from Eswatini further to work reduction in the sector. Some of them look for a job on their own in South Africa and some are trafficked there, along with workers from Mozambique and Lesotho (Verité, no date b). Other sources report about forced child labour in domestic work and livestock herding (US Department of Labor, 2021b). Moreover, traffickers target vulnerable groups in Eswatini such as orphaned children, with boys being forced to work in agriculture and girls turning victims of sexual exploitation. Men are trafficked to work in South African mines and timber industry (US Department of State, 2022b).

Eswatini ranks 34th out of 50 African countries regarding the number and the share of people living in conditions akin to modern slavery, with 4,000 such people in total or 3.6 persons for each 1,000 of inhabitants (the countries at the top of the list have the highest number of such people on their territory). While the activities taken by the authorities to address risk factors related to forced labour have been scored at 57%, actions to address forced labour in supply chains have been scored at zero (other activities received scores between 27% and 50%) (Walk Free, 2023). Reportedly, efforts to identify and provide care to victims, and to identify, prosecute and convict the traffickers are insufficient. There is also insufficient coordination between institutions and inadequate resources. Corruption is also reported as a problem (US Department of State, 2022b). In 2010-2016, 35 victims of human trafficking (in total) were identified in Eswatini, almost half of them (15) in 2012. Out of the total, eight persons were from China, followed by India (7), Eswatini (7), Uganda (4), Mozambique (3) and other countries. At the time, the poor, unemployed, orphans and illiterate persons were considered as the most vulnerable to trafficking (UNODC, 2017). In 2021, seven victims of human trafficking were identified (six from Eswatini and one from Mozambique) (US Department of State, 2022b).

5.4.Lesotho

Lesotho has ratified ILO conventions No. 29 and 105 on forced labour, as well as the 2014 Protocol to convention No. 29. In 2023, the ILO Committee of Experts noted an adoption of the Government's National Anti-Trafficking in Persons Strategic Framework and Action Plans for 2018-2023 and 2021-2026, with funds allocated to the latter's implementation. The Government has also provided training and awareness raising for law enforcement agencies and planned to strengthen oversight of recruitment agencies to reduce fraudulent recruitment to the mining sector in South Africa. Moreover, guidelines for identification of victims and their referral to care have been developed (CEACR, 2023).

According to the reports, garment industry workers may become vulnerable to trafficking or labour in exploitative conditions further to closure in 2020-2021 by the biggest garment employer of three out of five its factories. As a result, 6,000 workers have lost their jobs. There are also reports of garment workers from Eswatini working in the Lesotho factories in precarious conditions, and living within factory premises, with restrictions of movement and their documents being withheld (Verité, no date c). Other sources also report about sexual abuse of female workers in textile factories in Lesotho, including those owned by Asian companies. Traffickers target women and orphaned children for sexual exploitation, domestic work, and animal herding. Men are trafficked to South Africa to work in agriculture and mining sector. Some are forced to commit crimes. In 2021, labour inspection found one case of child forced labour in the garment sector in Lesotho (US Department of State, 2022c).

Lesotho has been identified as one of the three African countries hosting the lowest number of people living in conditions akin to modern slavery, with 4,000 of them or 1.6 person for a 1,000 of inhabitants. While the operation of the criminal justice mechanism has been scored at 50% and so has been the national and regional cooperation on matters related

to forced labour, activities related to addressing forced labour in supply chains have been scored at zero and the remaining ones, between 36% and 43% (Walk Free, 2023). In 2011-2016, 25 victims of human trafficking were identified in total. Out of these, 20 were from Lesotho and others from China, Pakistan, Ethiopia, Nigeria, and South Africa (UNODC 2017). In 2021, 24 victims were identified, including ten trafficked for labour and 14 for sexual exploitation. Reportedly, the Government has increased efforts in identifying and protecting victims recently (US Department of State, 2022c).

5.5. Mozambique

Mozambique has ratified ILO conventions No. 29 and 105 on forced labour, as well as the 2014 Protocol to convention No. 29. In 2023, the ILO Committee of Experts noted provision of training and awareness raising activities for the general public and for law enforcement agencies. On the other hand, the Committee expressed concern about the low number of identified cases of trafficking in persons and an equally low number of prosecutions and convictions, as well as the lack of progress in preparation of the action plan on fight against trafficking. The Committee noted the vulnerability of Internally Displaced Persons (IDPs) to human trafficking and highlighted cases of trafficking of Mozambican nationals to work in agriculture and mining sector in South Africa. It mentioned in this context the conviction in 2022, in South Africa, of two Mozambican nationals in a case related to trafficking of 39 persons from Mozambique to South Africa (CEACR, 2023). Other sources also highlight trafficking of women and girls for sexual exploitation (US Department of State, 2022d). In 2014-2016, 125 victims of human trafficking were identified (51 in 2014, 53 in 2015 and 21 in 2016). Almost all (124) were from Mozambique and one person was from Rwanda (UNODC, 2017). In 2019, 22 victims were identified, further two in 2020 and 15 in 2021 (US Department of State, 2022d).

Mozambique ranks 39th out of 50 African countries regarding the number and the share of people living in conditions akin to modern slavery, with 93,000 people or 3.0 persons for a 1,000 of inhabitants (the countries at the top of the list have the highest number of such people on their territory). While the operation of the criminal justice mechanism has been scored at 54% and the national and regional cooperation on matters related to forced labour, as well as the identification of and support to victims both at 50%, activities related to addressing forced labour in supply chains have been scored at zero and the remaining ones, between 43% and 45% (Walk Free, 2023).

5.6. Namibia

Namibia has ratified ILO conventions No. 29 and 105 on forced labour, as well as the 2014 Protocol to convention No. 29. In 2021, the ILO Committee of Experts noted adoption of the Combating of Trafficking in Persons Act (2018). Also, awareness raising campaigns in local communities have been conducted and training in the identification and protection of victims and the prosecution of traffickers has been provided to law enforcement officers, social workers, customs officers, and labour inspectors (CEACR, 2021).

According to reports, traffickers subject both Namibian citizens (including San and Zemba minorities) and nationals from other African countries (Angola, Zambia, Kenya, Zimbabwe, and South Africa) to forced labour in agriculture, cattle herding, domestic work, street vending, fishing, and sexual exploitation (US Department of State, 2022e). In 2010-2017, 82 victims of human trafficking were identified (62% of them were from Namibia, 21% from Angola, 9% from Zambia and the rest from Tanzania, Congo, and DRC. Out of these, 27 persons worked in conditions of labour exploitation, 20 were in domestic service, 18 in sexual exploitation and seven in child labour (UNODC, 2017). In 2020, 19 victims were identified and further seven in 2021 (US Department of State, 2022e).

Namibia belongs to the group of African countries with the lowest number (6,000) and share (2.4 persons for each 1,000 of inhabitants) of people living in conditions akin to

modern slavery on its territory. While activities of the authorities in addressing risk factors related to forced labour have been scored at 57% and the identification of and support to victims of modern slavery, at 55%, activities related to addressing forced labour in supply chains have been scored at zero and the remaining ones, between 25% and 46% (Walk Free, 2023).

5.7.South Africa

South Africa has ratified ILO conventions No. 29 and 105 on forced labour (however, has not ratified yet the 2014 Protocol). In 2021, the Committee of Experts noted the launch of the Prevention and Combating of Trafficking in Persons National Policy Framework in 2019 and the establishment of the National Inter-Sectorial Committee on trafficking in persons (CEACR, 2021).

Reportedly, further to downwards trend in the textile and garment sector in some SADC countries, workers from the sector (from Eswatini, Lesotho and Mozambique) fall victims to human trafficking to work in the sector in South Africa (Verité, no date). Traffickers also target both South African nationals (mainly from rural areas, like Gauteng) and foreigners to work in domestic service, mining, food service, construction, criminal activities, fishing activities and agriculture, including work in vineyards and fruit and vegetable farms (US Department of State, 2022f). The Government has admitted that South African inequality is one of the root causes of the problem and a systemic approach to address it is needed, as well as detection of cases of corruption (CEACR, 2021).

In 2014-2016, 207 victims of human trafficking were identified in South Africa, most of them (168) in 2016. The largest group (116 persons in total) was from Malawi, followed by South African nationals (72) (UNODC, 2017). In 2021, the Government identified 83 victims of human trafficking, while NGOs identified additional 24 child trafficking victims and 62 potential victims (through transit monitoring) (US Department of State, 2022f).

South Africa ranks 43rd out of 50 African countries regarding the number and the share of people living in conditions akin to modern slavery, with 158,000 people or 2.7 persons for each 1,000 of inhabitants (the countries at the top of the list have the highest number of such people on their territory). While the operation of the criminal justice mechanism has been scored at 69% and the national and regional cooperation on matters related to forced labour at 63%, activities related to addressing forced labour in supply chains have been scored at zero and the remaining ones, between 45% and 57% (Walk Free, 2023).

6. LABOUR STANDARDS – NON-DISCRIMINATION AT WORK⁴⁰

6.1.European Union

The EU Strategy for the Rights of Persons with Disabilities (2021-2030) focuses on three areas. These include 1) the right to move to another EU country and to participate in the political process, 2) the right to live independently and to enjoy inclusion in the community, and 3) non-discrimination, protection from violence and equal opportunities in, and access to, justice, education, culture, sport, and tourism (European Commission, 2021f). The EU is also a signatory of the UN Convention on the Rights of People with Disabilities. In 2011, 47.3% of people with basic difficulty in activity had a job.⁴¹ This meant the employment

⁴⁰ Given that the situation of informal workers, and women as workers is discussed separately, here we focus on other groups of workers who may face challenges or discriminatory treatment on the labour market in the EU and SADC EPA States respectively, including youth, migrant workers, elder workers, ethnic minorities, or persons with disabilities, among others.

⁴¹ The EU Labour Force Survey included in 2011 a module collecting data related to employment of persons with disabilities. This module has not been included into the Survey since then (info based on EUROSTAT).

rate for persons with disabilities being 20 percentage points lower than among the rest of the working age population. The largest differences were reported in the Netherlands (43% and 80%) and Hungary (24% and 61%), and the smallest in Luxembourg (2 percentage points). The unemployment rate for persons with basic difficulties was at 12.1% in 2011, i.e., 2.5 percentage points higher than among persons without such difficulties. However, the largest group of persons with basic difficulties remained professionally inactive (around 50% as an EU average), while there were significant differences between Member States, ranging from 70% rate of inactivity in Hungary to 27% in Sweden (European Commission, 2017c). Given the persistent employment gap between persons with disabilities and the rest of the EU working age population (23 percentage points in 2021), the Commission launched in 2022 Disability Employment Package helping to develop national policies in making labour markets more inclusive. It provides guidance in six areas, from recruitment to job retention (European Commission, 2022g).

Due to their situation on the labour market and the need to rely on other income sources, persons with disabilities belong in the EU to the groups most exposed at risk of poverty or social exclusion, with the rate of 28.4% in 2019 compared to 18.4% of people with no limitations in activity (a gap of 10 percentage points). Moreover, it is estimated that 68.0% of persons with disabilities in the EU would be at risk of poverty in 2019 if no social benefits were provided (EUROSTAT, 2021).

Reflecting demographic changes and increases in retirement age in many Member States, the labour activity rate of people aged 55-64 continued to increase from 62.3% in 2019 to 65.4% in 2022. Still, it remains well behind the overall activity rate (79.4% in 2022). The gender employment gap among older workers (12.7 percentage points) is also higher than the corresponding figure for the 20-64 age group (10.8 percentage points). That said, the increase in the overall activity rate observed in the last few years has been mainly driven by older workers and women. The employment rate for older workers reached 60.5% in 2021 and was 15.4 percentage points higher than a decade ago. However, there are significant differences between Member States, ranging from the employment rate well above 70% in Sweden, Denmark, Germany, the Netherlands, and Estonia to below 50% in Croatia, Greece, Luxembourg, and Romania. Moreover, in some Member States (Luxembourg, Slovenia, Malta, Romania, Croatia, and Poland), the difference between employment rate for older workers and the those aged 24-54 years extends beyond 30 percentage points, with the EU average being 19.9 points (European Commission, 2022g). Elder workers represented 21.8% of all employed in 2022. The share of agriculture in their total employment was higher (4.6%) than the EU average (3.5%), while the share of manufacturing (14.8%) in the total employment of this group was in 2022 lower than the average (16.0%) (EUROSTAT, no date).

While the situation of young people (15-24 years) on the EU labour market has been improving over the last decade, it remains challenging compared to the rest of working age population. The youth unemployment fell from around 25.0% in early 2014 to 14.4% in 2022, however, it remained more than twice as high as the overall unemployment rate (6.1% in 2022). The number of young people not being in employment, education, or training also kept falling, from 15.4% in 2010 to 11.7% in 2022 (EUROSTAT, no date; European Commission, 2016; 2021a; 2022; 2022g). Young people represented 8.2% of all employed in 2022 and tended to work less frequently in agriculture (3.1% compared to 3.5%) and industry (14.2% compared to 16.2%) than people aged 25-64 years. On the other hand, young people were more likely to work in retail trade (19.7% compared to 13.0%) than the rest of the working population (EUROSTAT, no date). Young people are more likely to be in temporary employment than the rest of the working age population: 43.3% in 2018 compared with 12.1% for those aged 25 to 54 and 6.6% for those aged 55 to 64. (European Commission, 2020a). This difference has further increased in 2021, with 45.9% of working youth being on temporary contracts, compared to 10.2% of the rest of workers (European Commission, 2022b). According to the latest evidence, young people were also on average more affected by the COVID-19 pandemic, by being more

exposed to job losses and working shorter hours than others. This in turn affected their incomes and the overall welfare. On the other hand, on average, they represent higher education levels, including digital skills and environmental awareness than other groups which make them better equipped for the green and digital transition in the economy (European Commission, 2022b).

People with a migrant background are exposed to poverty with a risk twice as high as the EU-born citizens (37.3% compared to 20.1% in 2018) (European Commission, 2020a). Moreover, as discussed in the section on informal economy, due to their skills profile and problems with getting work permits, migrant non-EU workers may need to rely on jobs in the informal economy, with lower wages and lower or no legal protections regarding social security, health, and safety at work and other elements of working conditions. This picture may be changing, however, with the new groups of migrant workers coming to the EU, notably from Ukraine.

6.2. Botswana

The number of persons with disabilities in Botswana increased from 59,103 in 2011 to 90,945 in 2017, with the disability rate increasing from 2.9% to 4.2% of the population. In a geographic break-down, in both, 2011 and 2017, the rate varied between 1.3% in Sowa Town and 4.4% in Ghanzi. The share of persons with disabilities who have never attended school decreased from 37.3% in 2011 to 32.9% in 2017. In 2011, 51.3% of persons with disabilities had the primary school as the highest level of completed education while 32.9% had the completed secondary school and 6.4% a university. There is no data available regarding their sectors of work. However, there is evidence that, depending on the type of disability, up to 22.2% of those persons worked as cash paid employees in 2011, up to 3-4.0% were self-employed, up to 8.0% worked on own land or cattle post and up to 23.5% were engaged in household's work (Statistics Botswana 2014; 2018). The Employment Act does not include any provisions focusing on persons with disabilities (Ndzing-Makhamisa, 2019).

In 2011, 18,395 non-citizens worked in Botswana, mostly in wholesale and retail trade, education, manufacturing, construction, transport, and communication. In manufacturing, larger groups of non-citizens were employed in the textile and garment sector, metal products, chemical products, publishing and printing, production of jewellery and electrical machinery (Statistics Botswana, 2015). The number of non-citizens fell to 16,740 in 2021, while sectors of their activity remained the same. The only change meant an increase in the employment in health care and social services (Statistics Botswana, 2022).

The number of persons aged 15-35 years (youth) in 2021 was estimated at 861,672. Out of those, 486,706 were in the labour force, and 65.6% of them (319,489 persons) worked. This also meant an unemployment rate of 34.4% (Statistics Botswana, 2022). A large share of young people in the population (children and youth under 15 years of age account for around 30% of people in Botswana), the high unemployment rate among them and the inability of the formal sector to create a sufficient number of jobs every year to absorb new labour market entrants forced the Government to act. It proposed initiatives, like the Revised Youth Policy, Youth Development Fund, the Young Farmers' Fund, the National Service Programme, and the Internship Programme. They have brought about results (e.g., by 2015-2016, 4,500 interns were offered permanent employment), however, given the scale of challenges, they had to be further strengthened and accompanied by other measures such as reform of the education system (ILO, 2020a).

Botswana has ratified ILO conventions No. 100 and 111. However, while the Government submitted reports on both in 2022, the ILO Committee of Experts has not published any comments. In earlier remarks, it welcomed the development of the Affirmative Action Framework for Remote Area Communities and its ten year implementation plan (2015-2025) covering areas, such as education, employment, economy, water, and land. It was

supposed to acknowledge the disadvantaged position of those communities and address some of the challenges they face (CEACR, 2017).

6.3.Eswatini

The number of persons with disabilities in Eswatini decreased from 171,347 in 2007 (16.8% of the population) to 146,554 (13.4%) in 2017. Regarding obtained qualifications, in 2017, 51.7% of them did not have any education completed, while 22.3% had a primary school certificate. Moreover, depending on type of disability, in each category, between 6% and 21% were employed, while the rest did not work (Central Statistical Office, Eswatini, 2019b; Mavundla, 2015). In 2018, Eswatini adopted the Persons with Disabilities Act which aims to improve the socio-economic situation of persons with disabilities, ensure their equal access to education, health care and other services, and improve accessibility of buildings and infrastructure (Mavundla, 2019).

In 2017, 22,564 foreign-born persons lived in Eswatini (35.3% of them were from South Africa and 28% from Mozambique). In a geographic break-down, the largest group of foreigners lived in Manzini followed by Hhohho. Moreover, 87.1% of them worked, which means an unemployment rate of 12.9%, much lower than in the total population (23% in 2016 increasing to 33% in 2021). Regarding sector of activity, 22.2% worked in other services, 12.2% in construction, 9.4% in health care, 9.3% in education, 8.2 in agriculture, 6.7% in manufacturing, 6.5% in wholesale and retail trade, and smaller groups in other sectors (Central Statistical Office, Eswatini, 2019).

Regarding youth, in 2017, out of 425,052 persons aged 15-35 years, 168,184 were in the labour force. Out of those, 109,013 persons (i.e., 65%) worked and 59,171 (35%) were unemployed (Central Statistical Office, Eswatini, 2019a).

Eswatini has ratified ILO conventions No. 100 and 111. In 2021, the Committee of Experts reminded the country about the pending need to align the legislation with convention No. 111 and to prohibit discrimination on several grounds listed there (CEACR, 2021).

6.4.Lesotho

The number of persons with disabilities decreased in Lesotho from 68,400 in 2006 (3.7% of the population) to 45,607 (2.5%) in 2016. Regarding the level of obtained qualifications, in 2016, 17.0% of persons with disabilities reported not having attended any school, 58% have completed primary education and 15.8% secondary. Regarding economic activity, both in 2006 and 2016 the largest group (around half) worked in the household, while up to 10.0% worked as a salaried employee, with differences between gender (Bureau of Statistics, Lesotho, 2009; 2018a). In 2021, Lesotho adopted Persons with Disability Equity Act. It includes provisions regarding equal access of persons with disabilities to education, employment, health care, sports, leisure activities and voting in elections, accessibility of buildings and infrastructure, and adequate adjustments in the above-mentioned areas to facilitate participation of persons with disabilities.⁴²

In 2016, 9,700 immigrants lived in Lesotho (51.6% from South Africa and 11.2% from Zimbabwe), 43.8% of them in Maseru and 15.9% in Leribe. Given a high proportion of children among them (31.5% of all immigrants being below 14 years if age, i.e., below the minimum age of admission to work), the rate of the economic activity was at 56.5% among persons of 10 and more years of age. At the same time, 179,579 of Lesotho citizens lived abroad, 99.5% of them in South Africa (Bureau of Statistics Lesotho, 2018a). While in the past, men migrated from Lesotho to look for work in the South African mining sector,

⁴² Persons with Disability Equity Act, 2021: <https://media.lesotholii.org/files/legislation/akn-ls-act-2021-2-eng-2021-03-12.pdf>

more recently, they work in construction and agriculture, and women in domestic service (ILO, 2018). In 2022, Lesotho launched, in cooperation with the International Organization for Migration, the National Migration and Development Policy (Ministry of Home Affairs, Lesotho, 2022).

In 2016, youth (15-35 years of age) accounted for 39.6% of Lesotho's population (794,940 persons out of 2,007,201). Out of those, 304,567 persons worked, with 72.7% remaining in Lesotho and the rest working in South Africa (Bureau of Statistics Lesotho, 2018a).

Lesotho has ratified ILO conventions No. 100 and 111. In 2021, the Committee of Experts asked the Government to follow the recommendations of the Law Reform Commission and to conduct the legislation review and codification and harmonisation of civil and customary rights and related benefits, notably in areas related to inheritance, succession, wills, and the administration of estates to ensure that the legislation corresponds to contemporary realities. Such a review and revision would help to remove current restrictions in women's access to employment and economic activity (CEACR, 2021).

6.5. Mozambique

In 2007, 475,011 persons (2.0% of the population) reported any type of disability. In 2017, their number increased to 736,038 persons, covering however, a potentially wider group, i.e., persons with disabilities, as well as facing difficulties of different type (e.g., in walking, hearing, etc.) (INE, 2017). Many of those persons live in rural areas and belong to the poorest and most vulnerable groups in the society, with lower levels of education and a more difficult access to the labour market. They also face higher unemployment levels (39% in 2010 compared to 9% among the rest of the population). Mozambique has adopted two National Action Plans for Persons with Disabilities (2006-2010 and 2012-2019), while different parts of its legislation establish the right of persons with disabilities to education, employment, social protection, and the use of public transport, among others (República de Moçambique, 2012; Uassuzo Lopes, 2014).

Young people have been facing difficulties in the labour market and a higher-than-average unemployment rate, e.g., 36.8% for 15-19 years old and 27.2% for 20-24 years old in 2004-2005, while the national unemployment rate stood at 18.7% (INE, 2004). In 2017, 34.0% of 15-24 years old worked in the reference week, with an average of 46.6% for all persons aged 15 years and more (INE, 2019).

Mozambique has ratified ILO conventions No. 100 and 111. In 2021, the ILO Committee of Experts expressed hope that the country would use the revision of the labour Act to align it with both conventions (CEACR, 2021).

6.6. Namibia

The number of persons with disabilities in Namibia increased from 98,413 in 2011 to 108,992 in 2016, accounting for 4.7% of the population between 2001 and 2016. In a geographic break-down, the highest number of persons with disabilities lived in 2011 and 2016 in northern regions (Ohangwena, Omusati, Oshana, Oshikoto, and Kavango). The share of persons with disabilities who have never attended school decreased from 51.2% in 1991 to 28.9% in 2011. At the same time, in 2011, 86.6% of persons with disabilities had completed at most primary education. In 2016, 52.2% of them reported learning difficulties and 63.6% difficulties in engaging in any economic activity. In 2011, out of 21,218 persons with disabilities who worked, 45.7% were active in agriculture, 7.2% in administrative and support services, 5.6% in construction, 5.0% in wholesale and retail trade, 5.2% in education, 5.0% in public administration, and 5.2% in domestic service (Namibia Statistics Agency, 2016; 2017). Several pieces of legislation related to education, employment, and employment services, childcare and protection, and voting in elections, among others, address rights and special needs of persons with disabilities (Ntinda, 2019).

In 2016, 70,373 non-Namibian lived in the country accounting for 3.0% of the population. Out of those, 43.4% were from Angola, 15.2% from Zambia, 12.6% from South Africa and 12.6% from Zimbabwe. There is no data regarding their economic activity (Namibia Statistics Agency, 2017).

Between 2012 and 2018, the number of persons aged 15-34 years increased from 767,214 to 876,908 (i.e., by 109,694). Out of those, 294,202 (38.3%) were employed in 2012 and while the number of employed increased to 310,854 in 2018, their share in the age group fell to 35.4%. The number of unemployed increased from 210,074 (27.4%) to 265,770 (30.3%) and so did the number of persons economically inactive, from 262,937 (34.3%) to 298,422 (34.0%). Out of those who worked in 2012, the largest group was active in agriculture, followed by trade, construction, domestic service, real estate and hotels and restaurants (Namibia Statistics Agency, 2013). In 2018, agriculture kept the largest share of employment (15.4%), followed by trade (14.9%), private households, incl. domestic service (12.0%), accommodation and food services (11.7%), construction (7.7%) and manufacturing (6.2%) (Namibia Statistics Agency, 2019).

In 2021, Namibia was discussed by the ILO Committee on the Application on Standards as an individual case in relation to convention No. 111. The Committee requested reports on measures taken to promote access to employment and occupational training to persons from disadvantaged groups and to ensure that workers who are victims of discrimination have effective access to legal remedies. The Committee also asked for information about the planned reform of the New Equitable Economic Empowerment Framework Bill, changes to the Affirmative Action (Employment) Amendment Act and strengthening of the mandate of the Employment Equity Commission (CAS, 2021). In the follow-up, the ILO technical mission to Namibia took place in 2021 to review progress made and to discuss a possible roadmap for further measures that could be taken by the Government in consultation with social partners (CEACR, 2022).

6.7.South Africa

In South Africa, questions related to disability were replaced in 2011 census with questions related to the overall state of health and difficulties the people encountered in certain types of activities. Depending on the activity, between 1.5% and 11.1% of respondents signalled some up to severe difficulty in exercising it (Statistics South Africa, 2012a).

In 2017, foreign-born persons (2 million) represented 5.3% of workforce in South Africa. This meant an increase from 1.3 million in 2012. They were more likely to be employed than South Africans, and while the unemployment rate has been increasing for both groups over time, in 2017, 18.4% of international migrants in South Africa were unemployed compared to 28% of local citizens. On the other hand, foreign-born persons were more likely to work in the informal economy than South Africans (27.1% compared to 15.7%) and in precarious working conditions. In a break-down by sectors, they were active mostly in wholesale and retail trade, agriculture, domestic work, construction, mining, hospitality, education, and healthcare. In 2011, the largest groups were from Zimbabwe, Mozambique, and Lesotho (ACMS, 2020; FES & ACMS, no date; MiWORC, 2013). According to other sources, by 2020, the figure further increased to 2.9 million, with the largest groups being from Zimbabwe (24%), Mozambique (12%) and Lesotho (7%) (Moyo, Migration Policy Institute, 2021; Migration Data Portal, 2021).

Youth has been disadvantaged on the South African labour market, facing a higher-than-average unemployment rate (63.9% for 15-24 years old and 42.1% for 25-34 years old compared to 34.5%). In 2022, only 2.5 million out of 10 million persons aged 15-24 years were in the labour force in South Africa, either employed or unemployed. The remaining part became inactive, i.e., not working and not looking for a job, with the most frequent reason being discouragement, the lack of hope to find a job matching the skills or being offered in the area of residency (Statistics South Africa, 2022a).

South Africa has ratified ILO conventions No. 100 and 111. A representation (a complaint) under Article 24 of the ILO Constitution has been submitted by Solidarity Trade Union against South Africa in relation to convention No. 111. In 2022, the ILO Governing Body decided to establish a tripartite committee to examine it. The conciliation process between the complainant and the Government is currently under way, with the ILO assistance (ILO, 2023). With regard to the same convention, the ILO Committee of Experts noted in 2023 the amendment of the Employment Equity Act and a high level of non-compliance (94%) by employers with its previous version. According to the latest data, the share (63.2%) of white people at the top management posts in the private sector is seven times higher than their overall share in the private sector, while the share of African population at the top management posts is six times lower than their overall share. A similar situation is at the senior management level, with 51.4% of white managers and even at the professionally qualified and middle management level, African population is severely underrepresented (CEACR, 2023).

7. LABOUR STANDARDS – FREEDOM OF ASSOCIATION

7.1. European Union

In the EU, Member States have developed different models of social partners' engagement in the design and implementation of relevant policies.⁴³ Over the last few years, many of them have been involved in designing and implementing new health and safety at work rules and employee support schemes during the COVID-19 pandemic, integration into the labour market of Ukrainian refugees and negotiating wages in the light of the cost-of-living crisis (European Commission, 2023). However, over the last decade, the shares of trade union members among workers have been falling. In 2007, they ranged from 7.6% in Estonia to 78.4% in Sweden, while in 2019, they were already lower, extending from 6.0% in Estonia to 67.0% in Denmark (OECD, no date). Likewise, the share of workers covered by collective bargaining agreements (as the EU average) fell from 66% in 2000 to 56% in 2019⁴⁴. While the situation in each EU Member State is different, overall, the move from employment in manufacturing to services sectors, the increasing number of self-employed and the development of new forms of work organisation, including digital platforms and atypical working arrangements have made it more difficult for workers to organise. At the same time, the share of employers belonging to business associations remained relatively stable (European Commission, 2023).

Social partners' experience from national social dialogue in EU Member States is diverse. Prior to the COVID-19 pandemic, they have been involved in the reform of wage setting mechanism, including minimum wage, anticipation of skills needs in the labour market, vocational education and training reforms, assistance for long-term unemployed, and labour law reform, among others (European Commission, 2020a). In 2021, the Member States were asked to consult their resilience and recovery plans with social partners prior to their submission. In some cases, social partners (both, employers, and trade unions)

⁴³ A revised Employment Guideline 7 (version of 2020) and the European Pillar of Social Rights call upon Member States to work with social partners on fair, transparent and predictable working conditions, balancing rights, and obligations. They should fight against undeclared work, prevent precarious working conditions, respect labour rights, and ensure social protection, and access to impartial dispute resolution (European Commission, 2020c).

Morover, all EU Member States have ratified the ILO fundamental conventions No. 87 and 98 on the right to organise and collective bargaining, as well as the priority convention No. 144 on tripartite consultations.

⁴⁴ The situation varies substantially across EU Member States. While in Italy, the share of workers covered by collective agreements has been considered as 100% in 2000 and 2019 (due to judicial rulings), and in Austria, France and Belgium has remained at the level above 90% since 2000 until 2018-2019, in most countries, it fell since 2000, with the most significant difference being in Greece and Romania, where – due to legislative changes and other factors – it declined from 100% in 2000 to around 15% in 2017 (European Commission, 2023).

admitted they had the opportunity and enough time to participate. Others have reported having had too little time for consultation and contribution or expressed low levels of satisfaction with the process and feedback, suggesting they had been informed about the plans rather than consulted about their content and focus (European Commission, 2022).

In June 2023, the EU Council adopted a Recommendation to strengthen social dialogue at the national level while respecting national frameworks and competences, incl. the fact that many Member States have a national advisory institution as a forum to consult social partners on policies and legislation related to employment, as well as tripartite bodies focusing on social protection, employment, training and health and safety at work. The proposal recommends that Member States create an environment enabling bipartite and tripartite social dialogue and ensure that social partners are systematically, timely and meaningfully involved in design and implementation of employment and social policies, as well as economic and other relevant policies. Member States should also enable collective bargaining at all levels and ensure that social partners have access to information about the situation in their sectors and corresponding policies and other measures. Moreover, social partners should be able to exercise their roles without any interference and should be protected against any harmful measures. For workers' representatives, this means any measures that could have a negative impact on their employment (European Commission, 2023a; EU Council, 2023).

In addition, at the EU level, the Treaty on the Functioning of the EU (Article 154) obliges the Commission to consult social partners on EU policy and legislative initiatives related to social field. This includes health and safety at work, working conditions, social protection, conditions of employment of third country nationals, equality between men and women at work and others (TFEU, 2012). The Commission also facilitates sectorial and cross-industry social dialogue between social partners at the EU level.⁴⁵

In 2023, the Commission published a Communication summarising the situation in the EU regarding social dialogue and outlining measures that can be taken at the EU level to further strengthen and support it. At the EU level, social partners have been involved in the Tripartite Social Summit, where the presidents of EU institutions and management of the main EU employers' and workers' organisations discuss the main economic and social issues faced by the EU. They are also engaged in Macroeconomic Dialogue and discussions related to the European Semester, i.e., the EU mechanism coordinating and monitoring economic and social policies. They participate in meetings of various committees, including the Social Dialogue Committee which provides the main forum for cross-industry social dialogue at the EU level. In the Communication, the Commission proposed enhancing that dialogue by holding dedicated tripartite discussions at the EU level on relevant topics, e.g., labour and skills shortages. The Commission also proposed modernising the existing EU institutional structures for sectorial dialogue, where 43 sectorial dialogue committees cover more than 80% of EU workforce and represent interests of employers (6 million firms) and workers (185 million persons) from different sectors (European Commission, 2023).

7.2. Botswana

In 2017, there were 61 registered trade unions (28 in services, six in education, six in manufacturing, five in mining, three in retail trade, two in construction, and 11 others), two trade union federations and one employer organisation. In 2020, trade union members accounted for 30% of workers (ILOSTAT, no date; ILO, 2020a). Trade unions are represented in the social dialogue by two federations (Botswana Federation of Trade Unions and Botswana Federation of Public Private Parastatals Sector Unions) and business community is represented by Business Botswana (former Botswana Confederation of

⁴⁵ For more information, please see the website of Directorate General (DG) Employment, Social Affairs and Inclusion: <http://ec.europa.eu/social/main.jsp?catId=329&langId=en>

Commerce, Industry and Manpower). The latter had 1,600 members in 2020, 80% of whom were SMEs. While there are arrangements for social dialogue, collective bargaining and dispute resolution, due to the capacity constraints, there are delays in addressing disputes and the ILO monitoring bodies have flagged shortcomings in the legislation and practice, which need to be addressed, such as non-compliance of the Trade Unions and Employers' Organisation Act with the ILO conventions, non-equal treatment of trade unions by the government, restrictions in the right to organise in the public sector and not consulting of social partners on some of the relevant legislative acts (ILO, 2020a).

Botswana has also ratified ILO priority convention No. 144 on tripartite consultations. It has established the Labour Advisory Board⁴⁶ and the High Level Consultative Committee as the consultative bodies for a discussion between the Government and social partners. In the 2021 report, the ILO Committee of Experts noted the lack of Government information as to whether plans for ratification of the remaining ILO conventions (such as conventions No. 81 on labour inspection and No. 129 on inspection in agriculture)⁴⁷ have been consulted in these bodies. The Committee also noted a complaint expressed by trade unions that, in contravention with the domestic legislation and convention No. 144, the Government had not consulted the tripartite bodies on proposals for legislation submitted to the Parliament and reports submitted to the ILO. They have also highlighted the lack of recent meetings of the Labour Advisory Board. On the other hand, the Committee noted information from the Government that the Labour Sector Committee of the High Level Consultative Council meets four times a year and that the labour-related legislation is reviewed by a tripartite Labour Law Review Committee, with a view to aligning it with ratified ILO conventions and closing other gaps (CEACR, 2021). There have been two cases against Botswana submitted to the ILO Committee on Freedom of Association (both have already been closed) and in 2018, Botswana was discussed by the ILO Committee on the Application of Standards as an individual case of concern regarding convention No. 87. The Committee called upon the Government to, *inter alia*, align the Trade Unions and Employers' Organizations Act with the convention, ensure that the registration of trade unions is in conformity with the convention in law and practice and process pending applications for the registration of trade unions (CAS, 2018).

7.3.Eswatini

In 2010, i.e., at the beginning of the period under review, employers were represented by the Federation of Swaziland Employers and Chamber of Commerce having 500 members among businesses of all sizes, and the Federation of Swaziland Business Community comprising 29 organisations and individual members. Regarding trade unions, the Swaziland Federation of Trade Unions had 25,000 members in 17 affiliated trade unions and the Swaziland Federation of Labour, 18,000 members in 12 affiliated trade unions. In 2012, they merged with the Trade Union Congress of Swaziland. There are also trade unions or other organisations representing sectors or interest groups, e.g., the Swaziland Migrant Mineworkers Association representing former mine workers (ILO, 2010; BTI, 2022). In 2016, trade union members accounted for 23.9% of workers (ILOSTAT, no date). However, freedom of association in Eswatini is reported as facing restrictions, trade unions have problems with registration and recognition by employers, their leaders are accused of not having a legitimate mandate to exercise their role, and workers are persuaded or forced to join employer-controlled unions. There are also reports of police violence against demonstrating workers, e.g., in 2019 and police management cancelling

⁴⁶ According to Part XVII of the Employment Act (1982, as amended), the Labour Advisory Board shall advise the Minister on several aspects related to dispute resolution and any other matter in relation to which an advice or recommendation is required or permitted under the Employment Act or another part of labour law. Moreover, the Minister shall, where it is reasonably practicable to do so, consult the Board before introducing in the National Assembly any Bill or subsidiary legislation related to employment (FAOLEX database, 2019).

⁴⁷ Botswana ratified both conventions in 2022, however, there is no information if this had been consulted with social partners.

the previously agreed industrial actions or demonstrations, without giving a reason, as required by the law, e.g., in 2018 (BTI, 2022; ITUC and TUC, 2021).

In this context, Eswatini was discussed seven times between 2009 and 2016 by the ILO Committee on the Application of Standards as an individual case of concern in relation to convention No. 87. Moreover, on four occasions: in 2009, 2010, 2011 and 2015, the Committee decided to highlight this case in the so-called "special paragraph" of its report which is a procedure to emphasise a particular seriousness of the identified violations and the lack of progress and/or cooperation by the country in question. While since then, some issues discussed by the Committee had been addressed, e.g., trade union federations had been registered and the Industrial Relations Act, the Police Service Act, and the Public Order Act had been amended, the Code of Good Practice for Industrial and Protest Actions and the Code of Good Practice on Gatherings had been adopted and awareness raising activities had been held, other problems persist. For example, in 2021, the Committee of Experts noted information provided by trade unions regarding police violence used against peaceful demonstrations and lack of recognition by employers of trade union federations (CEACR, 2021). There is also one active case at the Committee on Freedom of Association.

Eswatini has also ratified ILO priority convention No. 144 on tripartite consultations. There are two tripartite bodies established for the purpose of social dialogue: the Labour Advisory Board and the National Steering Committee on Social Dialogue (CEACR, 2021). While we did not manage to identify regular information regarding activities of these two bodies, at least the Labour Advisory Board seems to be active. For example, in April 2022, it agreed to intervene in the dispute on wages in the garment industry (ATUSWA, 2022) and in May 2023, its members reached an agreement on addressing in legislative reforms five issues important for trade unions, i.e., the prohibition to hire casual workers to replace workers being on strike, a transformation of Eswatini National Provident Fund into a pension fund, payment of severance allowance at retirement, the prohibition of labour brokers' activity and the prohibition to hire fixed-term contract workers for posts of a permanent nature (Zwane, Phungwayo, 2023).

7.4.Lesotho

In 2019, trade union members accounted for 4.8% of workers in Lesotho (ILOSTAT, no date). The Labour Code has established four social dialogue bodies, including the National Advisory Committee on Labour, the National Advisory Council on Occupational Safety and Health, the Wages Advisory Board, and the Industrial Relations Council. In 2018, there were five trade union federations representing trade unions in social dialogue meetings. On the other side, the Association of Lesotho Business and Employers represents business and has members from 21 sectors of the economy, incl. textile and garment represented by the Lesotho Textile Exporter's Association. The latter in turn represents around 70% of garment manufacturers in the country who jointly employ 75% of workers active in the sector. The social dialogue, both bi- and tripartite has focused mostly on wages, given the insufficient capacity of social partners' organisations and the lack of understanding in the government of the social partners' role, i.e., how they may contribute to the development of policy and legislation in relevant areas. There have also been restrictions to the right to organise in the public sector (ILO, 2018).

Lesotho has also ratified the ILO priority convention No. 144 on tripartite consultations. However, the Government has not provided to the ILO Committee of Experts information regarding tripartite consultations on aspects listed in the convention, including whether the social partners had been consulted on plans to ratify ILO convention No. 190 (violence and harassment at workplace) and the 2014 Protocol to convention No. 29 (forced labour) (CEACR, 2022; 2021). Previously, Lesotho informed that the National Advisory Committee on Labour had discussed and approved the ratification of ILO fundamental convention No.

187 (health and safety at work)⁴⁸ and the National Advisory Committee for Occupational Safety and Health had requested a workshop on that convention (CEACR, 2021).

7.5. Mozambique

In 2016, trade union members accounted for 12.5% of workers in Mozambique (ILOSTAT, no date). In tripartite dialogue, social partners have been represented by Confederation of Business Associations of Mozambique, the National Confederation of Independent and Free Trade Unions of Mozambique (CONSILMO) and the Mozambique Workers' Organization - Trade Union Confederation (OTM-CS). In 2011, the Confederation of Business Associations had 61 affiliated associations representing 2,500 enterprises from different sectors. On the trade union side, in 2011, OTM-CS comprised 15 trade unions and one association with 152,261 trade union members in total, while CONSILMO brought together three trade unions and one association with 98,000 members in total (ILO, 2011).

In 2022, the ILO Committee of Experts requested the Government of Mozambique to use the ongoing revision of the Labour Act to bring it into conformity with convention No. 87, including in relation to registration of trade unions and employers' organisations and the removal of penalties for peacefully striking workers (CEACR, 2022).

Mozambique has also ratified ILO priority convention No. 144 on tripartite consultations. It has been implemented by the Labour Advisory Commission (CCT) and in provinces, by the tripartite Social Dialogue and Consultation Fora. At its meetings, the CCT has discussed the Plan of Action for the National Employment Policy, the National Action Plan for the Elimination of the Worst Forms of Child Labour, two ILO conventions (No. 155 and 187) on the occupational safety and health, convention No. 81 (labour inspection), convention No. 176 (safety and health in mines) and the 2014 Protocol to convention No. 29 (forced labour)⁴⁹ (CEACR, 2023; 2021).

7.6. Namibia

In 2018, trade union members accounted for 18.3% of workers in Namibia (ILOSTAT, no date). In 2019, Namibia had three trade union federations (the National Union of Namibian Workers⁵⁰, Trade Union Congress of Namibia, and Namibia National Labour Organisation) covering in total 40 trade unions, while there were also trade unions not affiliated to any of the federations. In 2016, sectors having the highest shares of trade union members among workers included education, mining, water supply and other utilities, while those with the lowest shares covered construction, real estate, and domestic work. Business has been represented by the National Employers' Federation. In 2019, there were four bodies providing framework for social dialogue: the Labour Advisory Council, the Social Security Commission, the Employment Service Board, and the Employment Equity Commission. Social dialogue and work of these bodies have been limited to aspects related to labour, which means that social partners have not been systematically consulted on wider socio-economic questions (ILO, 2019).

Namibia has ratified the ILO priority convention No. 144 on tripartite consultations and the Labour Advisory Council serves as a consultative body under that convention. In 2023, the ILO Committee of Experts noted that the Government had conducted written consultations with social partners, however, no information had been provided regarding the subject matter of those consultations, nor their outcome (CEACR, 2023). Earlier, the Government informed that it had sent to social partners some reports that were later sent to the ILO,

⁴⁸ Lesotho ratified the 2014 Protocol in 2019, and conventions No. 187 and No. 190 in 2023.

⁴⁹ Mozambique ratified convention No. 176 and Protocols to conventions No. 81 and No. 29 in 2018.

⁵⁰ According to sources from 2010 and 2017, NUNW had around 84,900 members in affiliated trade unions, TUCNA 61,900 while the number of members in three affiliated trade unions was not known and NANLO had some 5,000-10,000 (Jauch, FES, 2018).

however, no information was provided regarding the reaction of social partners (CEACR, 2019). Moreover, no information has been provided as to whether social partners had been consulted on plans for the ratification of the ILO conventions by Namibia. In this context, it is worth noting that Namibia ratified four ILO conventions in 2018 (No. 81 on labour inspection, No. 122 on employment policy, No. 151 on labour relations and No. 188 on work in fishing) and two in 2020 (No. 189 on domestic workers and No. 190 on violence and harassment at the workplace) (ILO NORMLEX, no date).

7.7.South Africa

In South Africa, the National Economic Development and Labour Council established in 1994 provides the institutional framework for social dialogue and tripartite consultations. Trade unions are represented there by three federations, i.e., the Federation of Unions of South Africa, National Council of Trade Unions, and Congress of South African Trade Unions, while Business Unity South Africa represents employers. The Council also includes representatives of women, persons with disabilities, youth, and civil society organisations. In 2017, tripartite partners supported by the ILO managed to achieve an agreement on national minimum wage. In 2014, the number of trade union members was estimated at 3.1 million, however, the overall figure has been declining due to a decreasing number of trade union members in manufacturing, construction, agriculture, and finance resulting from changes in the economy structure and new forms of work organisation. On the other hand, changes in the Labour Relations Act and Basic Conditions of Employment Act have provided the legal basis for organisation of workers in non-standard employment and for collective agreement coverage for workers in precarious employment. Moreover, workers engaged in informal employment also establish organisations representing their interests, mostly at the local level (ILO, 2018a). In 2019, trade union members accounted for 29.1% of workers in South Africa (ILOSTAT, no date).

In 2023, the ILO Committee of Experts noted ITUC reports regarding anti-union violence and intimidation of workers taking part in industrial actions. This included killing in 2021 of two members of the National Union of Metalworkers of South Africa, one of them during a protest march for salary increase in metal and engineering industry. It was also reported that police forces and private security companies attacked other participants of this march. Other actions included intimidation of members of the South African Commercial Catering and Allied Workers Union by employers, such as legal notices and messages that they had been replaced by other workers. Act of violence against striking dairy workers, members of the General Industries Workers Union of South Africa have also been reported and four members of the National Emancipated and Allied Workers Union of South Africa have been suspended following a strike. The Committee requested the Government to reply to these allegations and to reports regarding difficulties of temporary workers and farmworkers to exercise the right to organise and to participate in an industrial action (CEACR, 2023). In previous comments, the Committee of Experts noted that further to a violent death of 34 workers of the mining sector in a strike action in 2012, the Government engaged in 2015-2016 with social partners to discuss amendments to the legislation (the Labour Relations Act, the Code of Good Practice on Collective Bargaining, Industrial Action and Picketing, and Picketing Regulations) and with social partners, police and prosecutors to establish an Accord on Collective Bargaining and Industrial Action. The latter states *inter alia* that the right to strike is enshrined in the constitution and the strike action is a legitimate way to demand respect for certain rights. It should also be peaceful and free from intimidation and violence also in the context of an intervention by the police (CEACR, 2021).

South Africa has also ratified the ILO priority convention No. 144 on tripartite consultations and in that framework, the tripartite Labour Market Chamber of the National Economic Development and Labour Council provides forum for discussion. Given that the Committee of Experts has not published in 2023 any comments in relation to the Government report on this convention submitted in 2022, the latest available comments are from 2018. At that time, the Government reported about four meetings of the Labour Market Chamber

held a year and workshops on international labour standards held in that forum (CEACR, 2018). In 2021, South Africa ratified ILO convention No. 190 (harassment and violence at workplace) (ILO NORMLEX, no date).

8. INFORMAL EMPLOYMENT AND INFORMAL ECONOMY⁵¹

According to the ILO, the existence of the informal economy may help to reduce poverty, offer opportunities for internal and external migrant workers (moving from rural to urban areas, and between countries) and cushion effects of the economic cycle. It may offer job opportunities and income to workers who have been laid-off (and e.g., due to the lack of unemployment benefit need to take any job to secure income) or who due to the low level or type of skills, or personal situation, cannot find a formal job. However, the informality also imposes limits on seizing opportunities, including those offered by a trade agreement. While some features of informal undertakings may vary, depending on the local context, informal enterprises are often small, characterised by low productivity and face constraints in growth and development. They struggle with access to funds, skills and technology, support schemes for MSMEs and getting new suppliers or customers. Sometimes, they may lose their business relationships if the new legislation or business reality (e.g., related to indirect taxes or trade transactions) requires formal paperwork or registration. The ILO suggests, therefore, a range of policies and measures encouraging a transition of those enterprises from informal to formal economy (ILO, 2015).

Such policy measures are in line with the ILO Recommendation No. 204 (2015) “Transition from the Informal to the Formal Economy” which suggests initiatives in areas, such as trade, taxes, business environment, employment, education, skills development, business and financial services, market access, infrastructure and technology, governance and targeted actions facilitating operation of MSMEs. On the other hand, ILO highlights that an increased competition on the market (being a result of reduction of tariff and non-tariff barriers) may increase outsourcing of certain services or processes and sub-contracting them at low cost, thus leading to increased levels of informality (ILO, 2014; 2015).

8.1. European Union

According to estimations, in 2016, informal economy contributed around 10%-20% to GDP in most of the EU, while in some EU Member States, such as Bulgaria, Croatia, Hungary, Poland, and Romania, that share was larger, and was estimated to be of 30%-35%. A weak enforcement capacity of state institutions and high tax and administrative burdens are considered in this context as factors which help preserve informal economy and provide incentives for tax evasion and wage underreporting. Other factors include low productivity and skills levels among workers who otherwise might struggle to find a job. Also, informal economy offers job opportunities to other vulnerable groups of workers, such as migrants, who may not have work permits or adequate skills to get a formal job (IMF, 2019).

Also in 2016, agriculture was reported as the sector having the largest share in the total informal employment. It employed 15% of all informal workers in the EU and was followed by wholesale and retail trade (13.1%), manufacturing (11.2%), and real estate activities (9.6%). Other sectors included transport and communication, with 6.9% and construction, with 6.4%. Persons engaged in the informal work tended to have lower education level,

⁵¹ According to a definition used by the ILO, informal economy is understood as enterprises and workers not covered or insufficiently covered by formal arrangements and includes also self-employed. Informal sector means enterprises which have not been registered and usually do not comply either with the domestic legislation related to payment of taxes, and social security contributions, working conditions, e.g., minimum wages, health and safety at work and others. Informal employment relates to situations where a person is not offered a written contract, social security contributions are not paid, wages are usually low and there are no protections related to e.g., unemployment, illness, or accidents at work (ILO, 2015).

worked longer hours, and earned lower wages than those working in the formal sector. If an average wage of a man employed in the formal sector in the EU was considered as 100% in 2016, an average wage of a man working in the informal sector equalled 71%, a wage of a woman working in the formal sector equalled 74% and a wage of a woman engaged in the informal work, equalled 56% (ILO, no date).

While taking measures to address undeclared work remains the responsibility of the EU Member States, at the EU level, the European Platform tackling undeclared work has been set up to provide a forum for cooperation. In 2021, it became a permanent working group of the European Labour Authority to support Member States in their efforts. In 2017, under its auspices, Member States prepared information regarding the scale of undeclared work, measures taken to tackle it and responsible authorities. Sectors named in this context as involving undeclared work included construction, agriculture, transport, accommodation and food services, food processing, wholesale and retail trade, security services, domestic, cleaning, and personal services, and professional services. The reasons for engaging in undeclared work included the lack of possibilities to find another job and the willingness to benefit from higher earnings, not burdened with taxes and social security contributions. On the other hand, tight competition on the market, high taxes, social security payments, and other administrative burdens were named as discouraging formal activity (European Platform tackling undeclared work, 2017).

Member States reported difficulties in estimating the scale of undeclared work and used different indicators to measure it. These included the share of GDP generated by informal economy, contribution of the informal economy to generation of the value added, the share of informal employment in the total employment, the share of informal wages in the total payroll, the number of cases of undeclared work reported by inspections and the estimated share or number of employers engaged in undeclared work and wage underreporting.

Solutions applied by EU Member States to tackle undeclared work included:

- deterring measures, e.g., improved registration of income, employees, social security contributions and working hours; inspections, and audits; increased administrative sanctions; obligation for workers at building sites to have an ID at all times; prohibition to pay wages in cash; and the obligation to pay higher bills digitally, not in cash,
- steps to enhance transparency,
- activities encouraging transition to formal economy and employment, e.g., subsidies for refurbishment of flats and houses if the work has been done by licensed craftsmen; payment by vouchers; short-term contracts for workers in agriculture; migration policy reforms; wage subsidies; lower taxes and social security contributions; higher tax-free thresholds; support for start-ups, and awareness raising (European Platform tackling undeclared work, 2017).

8.2.SADC EPA States

There are studies looking at Southern Africa / the SADC region regarding informal economy and jobs, as well as examples of measures taken by African countries to tackle high levels of informality. According to (Kiaga, Leung, 2020), the informality levels in Southern Africa (covering the SADC EPA States) estimated to be at 40.2% in 2016 have been lower than in the rest of the continent, with Western, Eastern and Central Africa recording informality of over 90% and the average for Africa being of 85.8%. In Southern Africa, informality has been linked to lower education levels (63% in 2016 among those not having completed any education, decreasing to 12.2% among persons having tertiary education), agriculture (73.7% compared to 34.1% in industry and 37.8% in services), self-employment (88.8%), and small enterprises (64.4% in those employing 2-9 persons, decreasing to 16.1% in businesses employing over 50 persons). Moreover, informality level is higher among young people (15-24 years) (56.4%, while in the age group above 35 years, it falls to 37%-38%)

as the formal sector does not create enough formal jobs to absorb new persons entering the labour market.

Given that most of the informal jobs and informal activity are concentrated in MSMEs, the corresponding policy measures encourage registration of MSMEs through cost reduction. Other measures focus on extending social security coverage and setting up dedicated social security schemes with a simplified contribution mechanism, for informal, domestic, and seasonal workers, as well as self-employed (Kiaga, Leung, 2020). Moreover, the level of knowledge and skills plays an important role in the employability. The data show that across Africa (and this includes Mozambique, Lesotho and Eswatini) up to half of children that graduate from primary school do not continue education and in addition, at each level, a substantial group falls out of the school system without finishing it. Therefore, there is a need to improve the quality of education and support the transition from primary to the secondary school, as well as continuation of education up to graduation. Informal workers should also have an opportunity to follow vocational training to develop skills required in the labour market, including in its formal part (UNECA, 2018).

Other studies highlight a role played by informal cross-border trade between the African countries. According to FAO (2017), it makes up to 30%-40% of intra-SADC trade and represents an informal income generating opportunity, mainly for individuals and SMEs. The factors underpinning it include burdensome and costly procedures related to formal trade and the lack of knowledge and funds to comply with them, while the consequences include reduced public revenues, flow in counterfeit goods, corruption at the border crossing points and the abuse of individuals, notably women. In this context, in June 2023, a meeting of experts from across Africa validated a methodology to collect data on informal cross-border trade. It has been developed upon request of the African Union Commission, with the support of the Economic Commission for Africa and Afreximbank. Further to its presentation to African Union specialised committees in 2023, its adoption by AU Heads of State is expected in 2024 (UNECA, 2023).

Botswana

In Botswana, the number of informal businesses has been increasing in the last 20 years, from 23,454 in 1999, over 40,421 in 2007 to 105,445 in 2015-2016 (the latest identified data). In 2015, they contributed 5.3% to the country's GDP. Most of them (67.6% in 2007 and 52.4% in 2015) were owned by women. Informal businesses operated in towns and cities (38.9% in 2007 and 26.7% in 2015) and urban villages or areas surrounding towns and cities (37.1% in 2007 and 48.8% in 2015). Among factors provided as explanation for the growth of the informal sector and its location, the literature provides the lack of formal jobs and migration from rural to urban areas. In a break-down by sector, wholesale and retail trade had the biggest and growing share (40.5% in 2007 and 51.3% in 2015), followed by services (26.9% in 2015⁵²) and manufacturing (12.2% in 2007 and 10.4% in 2015). Employment in informal businesses increased from 22,499 in 1999, over 60,386 in 2007 to 191,176 in 2015. This means that in 2015, persons in informal employment accounted for 27.5% of all employed (UNDP et al, 2021; Statistics Botswana, 2009; 2017).

Eswatini

In 2016, in Eswatini, 32% of employed worked in the informal sector. Additionally, 18,011 persons (6.2% of all employed) worked in an informal way in otherwise formally operating businesses, bringing the total of working informally to 110,175 persons (38.2%). In a

⁵² In 2007, the services sectors were reported individually, with real estate (20.3%), hotels and restaurants (8.3%) and transport and communication (6.4%) having the highest shares.

geographic break-down, informal employment ranged from 37.2% in Hhohho to 40.3% in Lubombo (Central Statistical Office, 2016).

According to a 2017 survey, 25% of MSMEs owners in Eswatini had a registered business which points to an informality rate of 75%. Compared to that, the registration rate in 2017 in South Africa was of 17%, in Lesotho (in 2016) 18% and in Mozambique (in 2012) 14% (FinMark Trust, 2017). Given the severe impact of the COVID-19 pandemic and the exclusion of informal sector from access to funds and other mechanisms, UNDP engaged with the relevant stakeholders to develop tailored solutions, e.g., an online platform for contributing, collecting, and spending money for informal business purposes, with all transactions being recorded. In this way, records build a financial history of an informal business replacing standard accounting and facilitating an application for microfinance. There is also an online shopping platform for (mostly women-led) informal businesses to market their products (Mlangeni, UNDP, May 2020; September 2020).

Lesotho

According to the ILO Decent Work Country Programme, over 50% of workforce in Lesotho have been employed in the informal sector, including subsistence agriculture. In it, labour relations are based on family or social links rather than contracts and there is no regulation of working conditions, such as working hours or wages and workers are not covered by social security arrangements. Moreover, as the Labour Code and labour inspection do not cover informal sector, workers cannot count on occupational safety and health measures or enforcement of other types of protection envisaged in the legislation for the formal economy (ILO, 2018). Informal businesses in Lesotho face the challenge of limited growth opportunities, low productivity and equally low quality of produced goods and services, not being competitive on the market, notably if compared with imports. They also face a difficulty in access to technology and finance, as the formal finance sector considers them as carrying too much risk. Informal businesses do not have funds or possibilities to recruit staff with qualifications in business management to lead their daily operation. Informal businesses are present in sectors including cottage/crafts, food preparation, processing and safety, wood, and other artisanal areas (UN, 2017).

Mozambique

In Mozambique, the number of persons engaged in informal activity increased from 7.6 million in 2004⁵³ to 13.5 million in 2021 (in the same period, the total population increased from 19.9 million to 31.3 million) (INE, 2006; 2021). Informal employment accounts for 80% of the total employment and social security covers only 6% of workers in the country (Aga et al, 2019). In a break-down by sector, agriculture has the highest share, although decreasing from 90.9% of all informally employed in 2004 to 77.3% in 2021. It is followed by trade and tourism (5.1% in 2004 increasing to 7.4% in 2021) and manufacturing industry jointly with construction (2.0% in 2004 increasing to 4.4% in 2021). Informal employment in other services accounted for 1.9% in 2004 (INE, 2006; 2021).

The number of informal businesses increased from 2.2 million in 2004 to 8.3 million in 2021 (INE, 2006; 2021). According to a 2018 survey comparing performance of informal businesses in three largest cities in Mozambique with formal enterprises, the informal ones sold about 14 times less, made 17 times lower profits, were 2-3 times less productive, had fewer employees, used less capital and raw materials, were less likely to have access to capital, used less good business practices and had less skills at disposal⁵⁴. In a break-down by sector, in the sample of informal enterprises, 72.7% operated in retail trade,

⁵³ There are only two survey reports available focused on informal sector, from 2004 and 2021.

⁵⁴ However, 7.6% of the analysed informal businesses operated with results comparable to formal establishments. They provided 10.6% of employment in the analysed group (Aga et al, 2019).

16.5% in manufacturing and 10.8% in other services. Among formal businesses in the same survey, the shares were like 61.6%, 6.4% and 31.9%. Moreover, 40.8% of informal businesses reported time, effort, and paperwork needed for registration as the main reason for remaining informal. Indeed, the literature provides examples showing that despite setting up one-stop shops for registration, this process in Mozambique can be very cumbersome and the officials may request more documents and higher fees than it is stipulated in the legislation, while obtained licenses for business operation may be issued for a shorter time than promised. At the same time, formal firms report competition from informal enterprises as an obstacle for their own activity. Such a view is more frequent in the retail sector where many informal businesses operate, as well as among formal micro-enterprises compared to larger ones (Aga et al, 2019).

Namibia

The number of persons in informal employment increased slightly from 412,327 in 2013 to 418,674 in 2018. Given a more dynamic increase in total employment, the informality rate decreased from 59.8% to 57.7%. In a geographic break-down, the rate of informal employment ranged in 2013 from 34.5% in Erongo to 87.0% in Omusati, while in 2018, it ranged from 35.4% in Karas⁵⁵ (Erongo came second with 40.9%) to 90.5% in Kavango West⁵⁶ (Omusati improved to 78.9%). In a break-down by sector, the highest informality rate was reported for domestic service (93% in 2013, decreasing to 91% in 2018) and agriculture (83.4% in 2013 increasing to 87.6% in 2018). While data is missing for some sectors in 2013, those for which data has been provided include other services (48%), hotels and restaurants (39.7%), trade (39%), manufacturing (23.5%) and construction (23.1%). There are substantial differences for those sectors compared to 2018, suggesting a dynamic increase in informality or (and more probably) a more accurate data collection in 2018, e.g., the informality level in construction was reported in 2018 at 65.3%, in hotels and restaurants at 68.6%, in trade at 48.8% and in manufacturing, at 46.7%. On the other end of the scale, low informality level has been reported in financial services (11.1%) (Namibia Statistics Agency, 2014; 2019).

According to a case study by the Ministry of Labour, Industrial Relations, and Employment Creation (2017) and a following publication by the Namibia Informal Sector Organisation and the Friedrich-Ebert-Stiftung (NISO, FES, 2021), informal economy was not included at the time in any way in the Namibian legislation, such as the Social Security Act or the Labour Act, representatives of the sector were not involved in the local decision-making affecting them and were often treated in an abusive way by municipal and law enforcement officials, with fines, evictions and confiscation of stock, among others. They also reflected the usual characteristics of the informal sector, e.g., in 2016, 92.1% of informal businesses were of sole-ownership, 70% of those running them had not received any training in their business or in management, 60% operated at home and most had difficulties in access to finance, so that funding was provided from their savings or by relatives and friends. 88.9% of enterprises were not registered with Social Security Commission. Recommendations of the Ministry included reforms of the legislation to extend social security protection on the informal sector and reduce burdens of taxes and procedures, training in financial literacy, management, and technical aspects to support entrepreneurs in their activity, and work in cooperatives to increase capacity and facilitate, e.g., purchase of machines. NISO and FES have elaborated, in cooperation with authorities and other stakeholders, a Code of Conduct for engagement and cooperation with informal economy representatives.

South Africa

⁵⁵ In 2013, Karas ranked second, with 40.7%.

⁵⁶ In 2013, Kavango had the third highest informality rate, 78.1%.

The number of persons in informal employment, outside agriculture, increased from 2.2 million in 2011 to 2.8 million in 2022, while the number of domestic workers (also working mostly informally) remained practically unchanged, at around 1.1 million and the number of persons working in agriculture (mostly informally) increased from 603,000 to 844,000. All these three groups taken together (3.9 million in 2011 increasing to 4.7 million in 2022) represented, respectively, 29.7% (in 2011) and 31.7% (in 2022) of all employed which is approximately the share of informal employment in the total employment (Statistics South Africa, 2012; 2022). According to another source (Kiaga, Leung, 2020), after a long period of informal employment accounting for over 50 % of the total employment in South Africa, since 2007 its share started falling to around 32%-35% and remained at that level until 2018, with limited fluctuations over the years, without a clear trend.

There may have been different factors contributing to this change, including any potential change in definitions or data collection. Some people previously employed informally may have become unemployed or inactive (the number of the latter increased from 14.8 million in 2011 to 17.2 million in 2022; this number included an increasing group of discouraged job seekers moving from 2.2 million in 2011 to 3.7 million in 2022) (Statistics South Africa, 2012; 2022). In addition, measures taken by the South Africa's Government to reduce informality may have also produced results. They included a strategy to formalise informal enterprises by creating a more enabling environment, as well as extending social security coverage onto domestic workers (in 2010, 642,007 domestic workers were registered in the system). Moreover, amendments to the labour legislation limited the use of fixed-term contracts, clarified the use of temporary employment arranged through intermediaries and introduced an assumption of being an employee if certain criteria are met. There were also local initiatives, like registration and regulation of street vendors' activity in Durban or engaging local businesses in Limpopo in projects to build local infrastructure. It has allowed them to gain the necessary experience, win later other contracts and increase employment (Kiaga, Leung, 2020).

9. GENDER EQUALITY

9.1. European Union

By gender, labour force activity rates in the EU recorded narrowing but still substantial differences. The share of professionally active persons among working-age women increased from 67.3% in 2010 to 74.0% in 2022, while among men, it went up from 81.3% in 2010 to 84.8% in 2022, with the gender gap decreasing from 14 percentage points in 2010 to 10.8 in 2022. The women's employment rate increased from 60.7% in 2010 to 69.3% in 2022 compared to 73.4% and 80.0% for men, with the gap narrowing from 12.7 to 10.7 percentage points (EUROSTAT, Labour Force Survey, no date; European Commission, 2021a; 2022). However, the COVID-19 pandemic highlighted the overall higher risks for women in the labour market, notably mothers of young children. Women experienced a steeper fall in working hours compared to men and single mothers faced more often job losses than women without children (European Commission, 2021a; 2022).

Women are increasingly well-qualified and in certain age groups outperform men in educational attainment (e.g., in 2017, 44.9% of women aged 30-34 had tertiary education compared to 34.9% among men). Yet, they tend to work fewer hours. The total EU part-time employment rate for women decreased from 31.1% in 2017 to 28% in 2021, while for men, it remained almost the same over that period (8.2% in 2017 and 8% in 2021), meaning the gender gap of 22.9 and 20 percentage points. Mothers work more often part-time compared to fathers (40.5% compared to 5.7% in 2014). Women also tend to have lower-ranking jobs than men and be more present in lower paying sectors. These factors contribute to a gender pay gap (16.2% in 2017 decreasing to 12.7% in 2021), which - combined with a usually shorter career - translates into lower pensions for women, with a

gender gap of 35.2% in 2017 (decreasing to 27.1% in 2021) (European Commission, 2023c; 2018b; 2018c; 2017a; 2020a; 2022; 2022g; 2016a; EUROSTAT, no date a).

EU Member States had time until August 2022 to transpose the Work-Life Balance Directive providing for more equal access for men and women to flexible working arrangements and the possibility to use family-related leave (European Commission, 2022). Member States have taken steps to increase the availability of childcare facilities, introduce more balance between men and women in parental leave, encourage women to return to work after childbirth, raise awareness on non-discrimination at work and increase transparency about wage levels for men and women (European Commission, 2018b, 2018c, 2017, 2017a). At the EU level, the Gender equality strategy 2020-2025 has been adopted, with annual reports (the latest was published in March 2023) providing information about gender equality situation in the EU (European Commission, 2020b). Moreover, in 2023, the EU co-legislators adopted a Directive to strengthen the principle of equal pay for work of equal value between men and women. EU Member States will have time until 7 June 2026 to transpose it into the national legislation (European Parliament, 2023).

By sector, in 2022, out of 91.6 million women (aged 15-64 years) working in the EU, 2.2 million (2.4%) worked in agriculture, 9.7 million (10.6%) in manufacturing, 13.2 million (14.5%) in wholesale and retail trade, 2.3 million (2.6%) in transport and 62.8 million (68.5%) in public administration and diverse services sectors, also including education and health care (EUROSTAT, no date). This sectoral pattern also has an impact on the extent to which international trade can support female employment. In 2019, 14 million of EU jobs occupied by women depended on EU exports to the world, however, this figure represented only 38.0% of all EU jobs supported by extra-EU exports. The relatively low representation of women (who occupy 46.0% of all jobs in the EU) was due to their employment in services which are less tradable than goods (compared to that, a larger proportion of men worked in the manufacturing sectors). Moreover, the share of women's jobs supported by extra-EU exports remained almost unchanged since 2010 when it stood at 37% (Kutlina-Dimitrova, Rueda-Cantuche, Piñero, 2022).

In 2012, women accounted for 31% of EU entrepreneurs, with the rate varying from 18% in Malta and 20% in Ireland to 40% in Lithuania and Latvia. The women-led enterprises were mainly present in services sectors, such as healthcare, social services, education, and other services, followed by trade and accommodation and food services (European Commission, 2014). Given the lack of recent comprehensive EU entrepreneurship data in a break-down by gender, we use the Global Entrepreneurship Monitor (GEM, 2019) survey covering 18 Member States, with individual findings for each of them⁵⁷. Accordingly, while the shares of male and female entrepreneurs in the working-age population vary across the EU, the smallest difference between men and women has been reported by Spain where 6.8% of men and 6.0% of women own businesses, while the largest has been noted in Latvia with 17.4% of men and 10.9% of women reporting entrepreneurship.

Moreover, while in a few Member States, agriculture plays a relatively important role in enterprises owned by men (representing around or over 20% in France, Estonia, Bulgaria, Croatia, Latvia, Poland, and Slovakia), engagement of surveyed women-led enterprises in agriculture varied from nil answers in Ireland and Germany, over a few countries with rates around 3%-4% (Austria, Bulgaria, Estonia, and Italy), up to Poland, Sweden, Greece, and Latvia, with rates from 10.1% to 18.9%. Manufacturing and transportation attracted nil answers in France, Italy, and Slovenia, while a few countries had 5%-8% rates (Austria, Croatia, Germany, Greece, Ireland, Latvia, Poland, and Slovak Republic), with the highest rates (10%-15%) were reported by Bulgaria, Estonia, Luxembourg, Spain, and Sweden.

⁵⁷ The Annual Report on European SMEs 2021-2022 admits that data on SMEs ownership by gender is scarce and incomplete and, hence, it is not possible to analyse more detailed trends in female entrepreneurship at the EU level (Muller et al, 2022). The report itself analyses only data related to self-employed persons.

Yet, this means that over 70%-80% of EU women-led enterprises operate either in the wholesale and retail trade or in other services sectors, with a leading sector depending on the country. For example, wholesale and retail trade had the largest share in Bulgaria (51.9%), Greece (56.8%), Italy (48.1%), Poland (39.3%), Slovak Rep. (37.5%), Slovenia and Spain (both around 30%), while in Germany, 40.6% and in the Netherlands 47.9% of women-owned firms operated in social, healthcare, and educational services, and in Croatia, 30.4% in financial and professional services. Moreover, Croatia and Slovenia have the highest shares in the EU of women-owned enterprises operating in ICT services, of 11.6% and 5.9%, respectively (GEM, 2019).

The main challenges faced by female entrepreneurs include access to finance, information, training, and networks for business purposes, and reconciliation of business and family life (EIGE, no date; Bastida, 2021). In response, the EU has developed several initiatives supporting female entrepreneurs, e.g., WEgate platform providing a "one-stop-shop" for women who want to start, run, or grow a business; the European Community of women business angels and women entrepreneurs and three European networks: 1) promoting women's entrepreneurship, 2) mentors for women entrepreneurs and 3) female entrepreneurship ambassadors (DG Internal Market, Industry, Entrepreneurship and SMEs, no date). There is also a Guide to fostering women's entrepreneurship published by the Commission in 2021 (European Commission, 2021c).

Regarding participation in international trade, a 2019 study of the European Commission and International Trade Centre revealed that compared to the composition of surveyed EU enterprises, women-led companies producing goods were well represented in exports of clothing, fresh and processed food, agrifood products, and electronic components. They also faced challenges which related to the sector, size of companies and other factors. For example, firms in clothing, electronic components, fresh and processed food, agrifood products, and metal manufacturing, faced frequent NTMs related to strict labelling requirements, rules of origin and product certification. Due to their small size, only 4% of women-led firms participating in the survey engaged in public procurement activities (compared to 9% of men-led companies) and 19% had to comply with private standards for goods (European Commission, ITC, 2019).

9.2. Botswana

For Botswana, employment-related data is presented differently for the beginning and the end of the period under review, which may make the comparison difficult. Accordingly, women's formal employment increased from 150,000 in 2011 and 197,865 in 2021. Given the existing informal employment, the total number of employed women in 2021, equalled 361,647 persons. Among men, the number of formally employed fell over the same period from 220,000 in 2011 to 196,581 in 2021. This means a slightly higher number of women in formal employment in 2021 than men. Also, the total number of employed women (361,647 persons) was higher among men (355,771). As the total number of women in the working age (15 years or more) was also (much) higher than of men (893,491 persons compared to 744,331) and the number of economically inactive women was higher than the number of inactive men (392,092 persons compared to 275,997), the labour force participation rate (56.1%) and the employment to population rate for women (40.5%) were lower than for men (62.9% and 47.8%). In a break-down by sector, in 2011, women were employed mainly in wholesale and retail trade, education, local government, public administration, domestic service, real estate and agriculture. Men worked in agriculture, construction, public administration, wholesale and retail trade and real estate activities. Compared to this in 2021, health care and manufacturing joined sectors employing larger groups of women, while for men, employment increased in manufacturing and transport (Statistics Botswana, 2015; 2022).

Data related to the informal economy suggests that the number of informal businesses in Botswana has been increasing from 40,421 in 2007 to 105,445 in 2015-2016 (the latest

identified data) and most of them (67.6% in 2007 and 52.4% in 2015) have been owned by women (UNDP et al, 2021; Statistics Botswana, 2009; 2017). One of the main reasons why women choose to run a business in the informal sector is the convenience of flexible time compared to the formal sector (Wang, 2012). On the other hand, challenges linked with the informal sector, to which women are more susceptible, include business risks and property crime, such as bribery and seizure of merchandise, difficulty of accessing credit, no access to social protection, health coverage and other social security benefits, and economic shocks, as experienced during the COVID-19 pandemic (UNCTAD, 2023; UNDP, 2021). Other hindrances include the lack of possibility to operate from non-residential business premises connected to public utilities, and low productivity due to curbed access to services. The reasons of non-registering businesses in Botswana include the avoidance of taxes and the need to comply with labour law, prohibitive registration fees, and the cost of compliance with other business regulation matters (World Bank, 2011).

Regarding the overall environment for women’s business activity, studies highlight that the success of female entrepreneurs in Botswana is significantly hindered by their lack of access to finance, the lack of personal assets, lack of education and training, socio-cultural boundaries, gender stereotyping, curbed networks, poor marketing strategies, and legal and regulatory requirements (Rudhumbu et al, 2020). Interestingly, women who cross over to male-dominated sectors tend to make larger profits and grow bigger firms in terms of the number of employees compared to women-run businesses in female-concentrated sectors. Factors that may also play a role mean that male-dominated sectors are more lucrative, are 'taken more seriously' and are more likely to operate in the formal economy. They are also more technologically and digitally advanced (Cherchi, Kirkwood, 2019). We note in that context that in 2022, Botswana topped the list of countries with the highest number of women entrepreneurs for the third consecutive year running (deVere, 2022), and ranked 35th (the highest from Africa) in the 2022 report by Mastercard (Index of Women Entrepreneurs) analysing conditions for female economic activity in 65 countries.

According to *Women, Business and the Law*, which rates 190 economies based on working conditions and structures put into place for working women, Botswana scored 63.8 out of 100 (a score that is below the regional average observed across Sub-Saharan Africa at 71). According to its findings, working conditions for women in Botswana require considerable improvements in areas of freedom of movement, laws that impact women's decisions to work, wage laws, laws that affect women's work post-childbirth, constraints faced by women starting and operating businesses, and gender disparities in property and inheritance (World Bank, 2021b). Botswana has implemented policies and programmes to bolster entrepreneurship. Examples include “The Botswana Investment and Trade Centre” advising on exports and FDI, “The National Development Bank” providing funds to SMEs and initiatives helping young people to acquire entrepreneurial skills (Rudhumbu et al, 2020).

Informal cross border trade is almost exclusively women's trade in Botswana. Some of its drawbacks include the risk for personal safety such as corruption, getting arrested or fined, harassment, including sexual harassment, forced prostitution, and exposure to health risks such as HIV. Others include lack of access to primary routes to cross the border, which exposes traders to security risks while taking secondary routes, as well as lack of access to facilities like toilet/sanitation, storage space, place to sleep, safe drinking water or food. Most of goods traded by women comprise of groceries, vegetables, fruits and crops, cosmetics, small household items, second hand clothes, and traditional Chitenge fabrics (AfricaPortal, 2021; UNCTAD, 2023).

9.3.Eswatini

In 2016, in Eswatini, women’s participation in the labour market was lower than among men (46.5% compared to 55.5%), and so was the employment rate compared to the

number or working age population (35.0% for women and 43.7% for men)⁵⁸. At the same time, the unemployment rate among women was higher than among men (24.8% compared to 21.2% for men). Men were also more likely to work in the informal sector than women (40.9% compared to 35.4%) (Central Statistical Office, Eswatini, 2016). In 2020, 23.9% of working women were below international poverty line above compared to 19.5% among men (UN Women, 2020). The COVID-19 pandemic had a negative impact on employment opportunities, with the employment rate for men falling from 43% to 27% and for women from 32% to 18% (a slightly larger fall for men was due to their employee status working for someone else, while women worked mainly on their own account) (UN Women, 2021).

One of the major challenges faced by women entrepreneurs in Eswatini are deep rooted gender stereotypes and biased attitudes towards women in the country. They also face lack of (general and family) support to kickstart business, problems with access to finance, unsuitable workspaces, lack of market opportunities and infrastructures, poor educational backgrounds, lack of business knowledge and the lack of technological skills (Bimha, Sridhar, 2018). Moreover, certain legislative acts discriminate against women, e.g., The Deeds Registry Act prohibits women to register property, while at the same time the lack of formal title to land poses significant business risk and makes it difficult to get a credit. The Marriage Act of 1964 confers an inferior status to women that makes it difficult for them to open and manage a bank account independently of their partners (Kiratu, Roy, 2010). Women are not allowed either to sign a legally binding contract in the same way as men or register a business in the same way as their male counterpart can do (World Bank, 2021b).

According to Women, Business, and the Law, Eswatini scored 46.3 out of 100 in terms of working conditions and structures in place for women. While the country scored high on mobility, the report pinpointed areas to be improved such as laws that impact women's decisions to work, affecting women's pay, constraints related to marriage, laws affecting women's work after childbirth, constraints on women starting and running a business, gender gaps in property and inheritance, and laws affecting the size of a woman's pension, and implementing reforms to improve legal equality for women (World Bank, 2021d). There are organisations supporting women's entrepreneurship, like the Businesswomen's Forum of Swaziland and in 2022, The Eswatini Gender Inclusive Finance Roadmap was launched to improve women's participation in the economy (Eswatini Positive News, 2022).

Even though trade agreements of SACU, SADC, and COMESA, of which Eswatini is a signatory, help to ease cross border travel for Eswatini female traders, challenges remain (Women Connect, 2023). The COVID-19 pandemic has had detrimental effects on female traders who constitute 65% of informal traders in Eswatini (United Nations, 2021a). Besides the halt of business activities, 93% of traders complained about increased duty and stock prices which forced many to use informal routes to cross borders, eventually exposing them to violence, bribes and fines, confiscation of goods, and harassment/sexual abuse by border authorities and middlemen (Friedrich Naumann Foundation, 2022). The main sectors in which women traders engage include agriculture, manufacturing (clothing and textiles), and services, including tourism and other business services (United Nations, 2021a).

9.4. Lesotho

In 2014-2015 in Lesotho, out of 257,147 working women, 25.9% worked in households, 21.1% in manufacturing, 14.6% in wholesale and retail trade, 10.1% in agriculture, 7.7%

⁵⁸ By 2022, women's labour force participation slightly increased to 47.3% (World Bank: <https://data.worldbank.org/indicator/SL.TLF.TOTL.FE.ZS?locations=SZ>) while the rate for men fell to 54% (World Bank: <https://data.worldbank.org/indicator/SL.TLF.CACT.MA.ZS?locations=SZ>)

in education, 4.4% in healthcare and social services, 3.4% in accommodation and food services and the rest in other sectors. Among men, out of 329,891 employed, 33.4% worked in agriculture, 18.4% in construction, 11.2% in mining, 8.6% in wholesale and retail trade, 6.2% in transport and storage, 5.2% in manufacturing and the rest in other sectors. Moreover, 75.1% of women worked as an employee, 19.4% as self-employed, 3.7% as unpaid family worker and 1.5% as employer. Among men, 67.4% worked as an employee, 20% as self-employed, 11.2% as unpaid family worker and 1.3% as employer (Bureau of Statistics, Lesotho, 2018). Between 2017 and 2020, the labour force activity among women increased from 47% to 56.1%, while for men, it was at 71.3% in 2020. Moreover, the share of women working as employees increased from 75.1 in 2014-2015 to 80.4% in 2020. It was also estimated that vulnerable employment accounted for 61.6% among women and 44.4% among men in 2021 (World Bank, 2020c; 2021c).

The high unemployment rate of women (23%), associated with low level of education, has resulted in many women establishing small scale enterprises (Rantso, 2022). According to studies, 70% of micro- and small enterprises in Lesotho, often concentrated in low-value sectors, are owned by women (UNDP, 2022a). There is also an inequality noted: while these women play an important role in the social economy and cooperatives and have an influence on saving and lending groups driving women's financial inclusion, at the same time, female entrepreneurs are under-represented in leadership positions, formal business and public procurement procedures (UNDP, 2022b).⁵⁹ A study published in 2022 (Rantso) describes multilayered challenges faced by women entrepreneurs in Lesotho, notably the lack of capital (noting that doing business in Lesotho can be rather expensive), market access, availability of raw materials for processing, and government support. Due to the gender discriminatory nature of the customary land tenure system which obstructs women from owning land and collateral, women fail to secure finance from commercial banks. They are not allowed either to borrow money or act independently in economic affairs without their husbands' consent. A legislative improvement was the adoption in December 2022 of the Harmonization of the Rights of Customary Widows and the Legal Capacity of Married Persons Act which aims to enhance the economic status of the customary widows to enable them to exercise their economic and property rights.

According to Women, Business, and the Law, Lesotho scored 75.6 out of 100, which was above the regional average observed across Sub-Saharan Africa (69.9). The strengths included mobility and pensions, however, Lesotho still needed to improve laws affecting women's decisions to work, laws affecting women's pay, and laws affecting parenthood, and address constraints related to marriage, constraints related to women's starting and running a business, and gender gaps in property ownership and inheritance, and improving legal equality for women (World Bank 2020d).

The main sectors in which women entrepreneurs operate in Lesotho include manufacturing (e.g., beer brewing and craft), retail and wholesale trade, and agriculture. Women rarely launch businesses in high tech and engineering sectors (UNDP, 2022a). According to an UNCTAD study, the trade-led structural transformations in Lesotho – precisely the fast expansion of supply and trade capacity in the apparel sector - has, on one hand, created women empowering opportunities through job creation in export-led sectors whereby the main beneficiaries have been underprivileged and relatively unskilled women. On the other hand, concern has been raised about the quality of such employment in terms of wages, working conditions, skills development, and vulnerability to external shocks (UNCTAD, 2012). Cross border female traders also face significant challenges such as gender based violence, limited access to finance when crossing borders and other potential cross border crimes such as human trafficking (Africa Press, 2021; Business, 2020).

⁵⁹ In 2018, women owned 34% of formal businesses, while 66% were owned by men. In 2019, women were represented at 31.7% of middle management and senior positions (World Bank, 2021c).

9.5. Mozambique

In Mozambique, 77.6% of women of working age (15 years or more) worked in 2004 (compared to 72.3% of men) and this rate further increased to 81.1% in 2021 (86.7% for men). Over the whole period under review, the employment rate was much higher in rural areas compared to urban ones (86.2% and 62.8% respectively for women in 2004 and 92.5% and 65.4% in 2021, while for men, it was 81.3% and 54.1% in 2004 and 93.2% and 78.3% in 2021). The surveys also provide data in the geographic break-down, with the by-far-lowest employment rate registered in the capital (Maputo) in both, 2004 and 2021 and for each gender. The 2004 survey also includes data in a break-down by sector, with agriculture being the main employer for both, women, and men (87.3% and 68%, respectively), followed by wholesale and retail trade (7.0% for women and 11.7% for men). Moreover, 2.0% of women worked in services (3.9% of men), 1.2% in industry (5.4% of men) and 1.0% in education (2.3% of men) (INE, 2004; 2021). The unemployment rate increased from 3% in 2003 to 3.9% in 2022 (World Bank, 2022b).

At the beginning of the period under review, while minimum standards had been defined, the actual working conditions in Mozambique did not comply with them. The urban sector was mostly characterised by informal work whereby many workers did not even have an employment contract. The informal nature of work meant that many were unaware of the minimal wage, maximum working hours and maternity leave. About 1/3 of workers were unaware of existing legal entitlements. Many workers in the informal economy were not covered by social protection mechanisms. Only 22% of workers reported contributing to pension funds. Most workers did not benefit from maternity leave or sick leave. Only about 27% of workers had access to paid annual leave (Eurofound, 2012). In 2021, in terms of women's working conditions, Mozambique scored 82.5 out of 100 in the Women, Business and the Law 2021 score – much above the regional average of 71 within the Sub-Saharan African region. High scores were allocated in mobility, laws affecting women's decisions to work, marriage, women starting and running a business, and gender gaps in property and inheritance. On the flip side, areas identified for improvement included laws affecting women's pay, parenthood laws, pension laws, and reforms to improve legal equality for women (World Bank, 2021e).

About 60% of small and medium-sized Mozambican companies are operated by women, though women entrepreneurs mostly own small businesses, have limited access to capabilities (e.g., information and networks) and resources (funds), employ fewer people and juggle with paid work and unpaid housework (Club of Mozambique, 2022). Women are expected to stay at home and care for children without the support of their husbands, while men are seen as breadwinners. Some women even have to close their businesses early such as shops, to attend to household chores and/or kids, all which prevent them from focusing on work as men do and scaling up their businesses (TechnoServe, 2022). COVID-19 pandemic had a substantial negative impact on small businesses and entrepreneurs (GEM, 2020).

Existing obstacles faced by women traders in Mozambique when it comes to trading at the Mozambique-Malawi border are bribes, tariff and non-tariff barriers, access to finance, and socio-cultural norms. Records show that small-scale women traders quit the business after five years (Malavoloneque et al, 2023). In recognition of challenges faced by women traders, there are initiatives to support them. For example, Trade Forward Southern Africa in partnership with other stakeholders organised networking events to facilitate peer to peer learning and sharing of knowledge and key business skills (Trade Forward Southern Africa, 2022). Also, UNCTAD organised a training workshop on Cross-border Trade rules and Procedures, and Entrepreneurship for small-scale and informal cross-border women traders in Mozambique (UNCTAD, 2023a).

9.6. Namibia

In Namibia, the women's labour force participation rate increased from 63.2% in 2012 to 69.1% in 2018, while for men, it increased from 69.1% to 73.5% in the same period which means that the gap between the gender narrowed from 5.9 to 4.4 percentage points. However, the share of employed persons among the economically active population decreased among women from 68.2% in 2012 to 65.7%, which means unemployment rate increasing from 31.8% in 2012 to 34.3% in 2018. Among men, the employment rate fell from 77.1% in 2012 to 67.5% in 2018, which means that at the same time the unemployment rate increased from 22.9% in 2012 to 32.5% in 2018. In a break-down by sector, the largest share of women worked in 2012 in agriculture, followed by private households (incl. domestic service), wholesale and retail trade, accommodation and food services, and education. Men worked in agriculture, followed by wholesale and retail trade, construction, public admin., transport, and manufacturing. In 2018, the sector selection remained the same, the only exception being a decreased share of households as women's employer (Namibia Statistics Agency, 2013; 2019).

A study conducted in 2019 revealed a new trend of young, educated women entrepreneurs in Namibia who earn a very basic yet steady income allowing them to be self-sufficient and independent. The main challenges faced by women entrepreneurs in Namibia included the lack of entrepreneurial skills, finance, resources, and marketing skills, as well as the lack of government support (Semente, 2019). Women entrepreneurs also have limited access to education, and face barriers of gender socio-cultural norms, the lack of social protection, and challenges related to the informal sector (Bobek, 2022). While they need some form of counselling and encouragement, women entrepreneurs also think that the government and other decision-makers should be more aware of the contribution which female entrepreneurship may make to the economy and the added value it represents for the society (April, 2022). COVID-19 has starkly disrupted SMEs and forced businesses to shift to online operation or finding alternative solutions (April, 2021). Some scholars have suggested that the government of Namibia take action to empower women entrepreneurs through a direct labour market intervention, through providing support to the informal sector, as well as by consolidating a gender sensitive constitutional, legal, and institutional framework, the enforcement of gender-responsive laws and policies, and promoting access to resources and education (Bobek, 2022).

Namibia scored 86.3 out of 100 in the Women, Business, and the Law 2021 score (whereby the regional average was 71 in Sub-Saharan Africa), with high scores in areas of women's decisions to work, laws affecting women's pay, marriage, gender gaps in property and inheritance, and pension laws. Recommended areas for improvement included mobility, parental laws, hurdles faced by women in starting and running a business, and legal equality reforms for women (World Bank, 2021g).

Some of the challenges faced by Namibian women in trade are access to finance and markets beyond border trade, selling price barriers, preferences of South African buyers who prioritise doing business with agents (who are more likely to be registered and operating in the formal sector compared to female traders who tend to operate in the informal sector) and the fact that retailers prefer to buy products with barcodes (AllAfrica, 2021). Other obstacles include paying import duty when importing goods for consumption; logistics, domestic and foreign administration; the lack of financial knowledge, issues related to intellectual property and business ownership. Against this background, there are views that more trade openness, more effective operation of border crossing points and further tariff liberalisation could lower costs for women consumers and increase real income for female-headed households whose share in all households increased from 30.8% in 1992 to 43.9% in 2013) (World Bank, 2013). These measures should ideally be backed by complementary policies that enable women to participate in the economy to their full capacity. Addressing digital illiteracy and creating new online platforms could also promote women's competitiveness in trade (AfroNews, 2021).

9.7. South Africa

In South Africa, the unemployment rate for women has been higher than for men, with both rising over time, for women, from 28.2% in 2011 to 36.4% in 2022, and for men, from 22.5% to 33.0%. This also demonstrates that due to a higher unemployment increase for men the gender-related unemployment gap has been narrowing. The labour force participation rate among women increased from 47.6% in 2011 to 50.7% in 2022 and among men, from 61.0% to 63.2%. The employment rate among women (as a share in the group of working age women, 15-64 years) decreased from 34.2% in 2011 to 32.2% in 2022, and among men, it fell from 47.4% to 42.4%. Compared to men, women who fail to find work in South Africa are more likely to end up in vulnerable employment usually characterised by insufficient earnings, low productivity, and difficult work conditions (Statistics South Africa, 2012; 2022).

The below data provides an indication of changes by sector between 2011 and 2022, regarding the share of each sector in the total employment. In 2011, women worked in community and social services (28.5%). This share increased to 34.4% in 2022. The sector was followed by wholesale and retail trade (24.6% in 2011 falling to 21.1% in 2022), private households, including domestic service (15.2% in 2011 falling to 12.7% in 2022), financial services (11.6% increasing to 14.4%) and manufacturing (11% falling to 7.6%). In 2011, men worked in the wholesale and retail trade (21% falling to 19.2% in 2022), community and social services (16.2% falling to 15.5%), manufacturing (15.8% falling to 12.9%), finance (13% increasing to 16.6%) and construction (12.4% falling to 11.2%) (Statistics South Africa, 2012; 2022).

In terms of working conditions and business environment for women, South Africa scored 88.1 out of 100 in the Women, Business and The Law 2021 score (whereby the regional average was 71 in Sub-Saharan Africa). High scored were allocated to mobility, laws affecting women's decision to work, equal pay laws, marriage, constraints for women starting and running a business, and gender disparities in property and inheritance. Areas identified for improvement included parental laws, pension laws, and possible reforms in legal equality for women (World Bank, 2021f).

According to Sekatane (2017), South African women entrepreneurs, in particular Black South African women entrepreneurs continue to face challenges due to their race, gender, geographic location, lack of access to finance, the level of education and training, non-supportive socio-cultural environment, the absence of networks and mentors, and the lack of business management skills and marketing skills. In case they operate in sectors dominated by men, they face in addition mistrust, disrespectful treatment by customers, hostility by male counterparts and business difficulties, such as non-payment or delayed payment for services. Also, while some of them start own business out of necessity (e.g., after losing a job and not being able to get another one), others appreciate independence, flexibility in working hours and activity in a sector of their choice. Women also have to combine their business activity with family and household responsibilities which results in time poverty (Mulaudzi, Schachtebeck, 2022). On average, women operate smaller enterprises than men and are less frequently present in more sophisticated sectors or activities. However, when they succeed, they often face jealousy, and suffer from mental, physical, and emotional abuse as a result of their success – a situation that impacts their self-confidence and motivation (Nambiar et al, 2019).

The existing challenges faced by women entrepreneurs in SA were exacerbated by COVID-19. 59% of women-owned businesses are in sectors hardest hit by the pandemic, such as retail trade, restaurants, and domestic services. Many women traders have experienced declines in trade flows as a result of the pandemic, notwithstanding the opportunities that were created during the crisis in terms of online shopping and digital commerce. In 2021, women accounted for 19.4% of all business owners in South Africa, having a smaller share

than in some other African countries, like Uganda (39.6%), Botswana (38.5%) or Ghana (36.5%) (Mastercard, 2021).

Traders in South Africa suffer from high costs and delays due to complicated and inefficient border procedures, notably at land borders to access the main corridors, and also at seaports. In a World Bank study on Trade Facilitation and Gender Dimensions in South Africa, where traders, customs brokers and freight forwarders were interviewed, it was found that women face greater obstacles than men. More women than men face goods detention due to issues of licenses, permits, certificates of origin, permit to import and plant/animal quarantine issues. When seeking information on official border regulations, more female customs agents reported a lack of comprehensive information made available. Women traders also claimed that official governmental websites and enquiry points were not user-friendly and hence, they had to rely on their personal networks and customs agents for information which was not always clear. The report also highlighted that not many traders were aware of the National Trade Facilitation Committee and that many women customs agents have reported feeling unsafe at a certain point when visiting the border (World Bank, 2022a).

10. CORPORATE SOCIAL RESPONSIBILITY (CSR) / RESPONSIBLE BUSINESS CONDUCT (RBC) INSTRUMENTS AND PRACTICES

10.1. European Union

In the EU, the CSR / RBC policy has been implemented through a mix of voluntary initiatives and legislative instruments, both at the EU level and by individual Member States. To give an example, 15 EU Member States (the Netherlands, Denmark, Finland, Lithuania, Italy, Sweden, Germany, France, Poland, Spain, Belgium, Czechia, Ireland, Luxembourg, and Slovenia) have developed National Action Plans on Business and Human Rights, while three more (Greece, Latvia, and Portugal) have committed to do so (UN OHCHR, no date). At the same time, the EU has adopted an Action Plan on Human Rights and Democracy 2020-2024 which includes commitments to engage with businesses and other stakeholders in promoting and implementing good practices related to business and human rights and due diligence along supply chains (Council of the EU, 2020). A detailed overview of activities undertaken by the EU and its Member States in implementing the UN Guiding Principles on Business and Human Rights, and CSR/RBC policy, was provided in the EU replies to a UN questionnaire in 2020 (EU, December 2020).

These include, among others, legislative initiatives related to due diligence in supply chains and non-financial reporting. Regulation on deforestation-free products entered into force in 2023 and obliges economic operators, who place on the EU market products often linked to deforestation, to prove that those products do not originate from recently deforested land and did not contribute to forest degradation (European Commission, no date e). The Regulation on responsible sourcing of minerals from conflict affected and high-risk areas entered into force in 2021 and aims to ensure that profits from extraction of tin, tungsten, tantalum, and gold placed on the EU market do not support armed groups, conflict, and human rights violations (European Commission, no date e). Two more legislative proposals (Regulation banning products manufactured with the use of forced labour and Directive on Sustainability Corporate Due Diligence) are still in a discussion. Moreover, the Directive on Sustainability Corporate Reporting, which entered into force in 2023, strengthens rules on reporting on social and environmental aspects of business activity and extends the range of companies obliged to report (European Commission, 2023b). Additionally, the EU promotes the use of international instruments and due diligence practices developed by the UN, the OECD, and the ILO, including in its assistance projects (European Commission, 2019).

10.2. Botswana⁶⁰

The evidence identified to-date suggests that Botswana has not developed yet the National Action Plan on Business and Human Rights (UN OHCHR, no date) nor the National CSR/RBC Policy. On the other hand, declarations about pursuing CSR policy and information about undertaken activities can be found on websites of large companies / corporations in several sectors, including power generation, banking, housing, security services, transport and extractive industries.⁶¹ Examples of activities provided there include different types of donations for schools and local communities (e.g., computers, printers, backpacks, books, schoolbooks, clothes, shoes, air conditioners, sport equipment and hygiene products), repairs in school buildings, construction or refurbishment of sport facilities, and awareness raising activities regarding HIV and environment.

These findings seem to be in line with outcomes of a broader study (Maphosa, 2021) where 87 companies from Botswana were surveyed with regard to their CSR policy. Most seen it as a corporate philanthropy related to different types of donations, with 25.3% stating that engaging in CSR activity may help to improve the image of the company and (22.9%) reputation of the brand. Respondents often (66.7%) named local communities as their main stakeholder followed by shareholders (23.8%). On the other hand, CSR did not seem to be included in their main areas of activity or company's strategy and stakeholders did not seem to be involved in shaping that policy.

Regarding participation in international initiatives, one SME from Botswana (renewable energy sector) has been listed by the UN Global Compact as a signatory.⁶²

10.3. Eswatini

According to the available evidence, Eswatini has not developed a National Action Plan on Business and Human Rights yet and there is no information about any activities in this area. Likewise, we did not identify any evidence regarding its wider CSR policy. Examples of CSR activities that have been found relate to individual firms, business associations and other types of organisations. These should be seen as an illustration and not an exhaustive list. They represent diverse sectors including transport (railways), banking and insurance services, utilities (water supply) and sugar sector.⁶³ The activities listed on their websites include funding to support primary education and skills development in rural areas, health care provision for employees and local communities, preservation of environment, drought relief, sports, music, culture, projects for women, youth, persons with disabilities, elderly people and orphans, projects supporting education at higher levels and research and projects promoting youth entrepreneurship. However, as only very few websites provide any kind of reporting from delivered activities, it is difficult to establish how many of these organisations go beyond a pure declaration and when the activities have taken place.

There are no signatories from Eswatini yet to the UN Global Compact (UN Global Compact, no date). However, farms and companies producing fruits and vegetables, but not only, may also be certified by one of the sustainability certification schemes which require adherence to certain environmental or labour standards and sustainable farming practices.

⁶⁰ The evidence regarding CSR/RBC in SADC EPA States identified to-date is largely limited to policies of individual companies, including their membership in certification schemes. If more information is gathered at further stages of the analysis, including through stakeholder engagement, it will be added here.

⁶¹ The sample of companies that follow has been used for illustrative purposes only and does not exhaust the list of those that may follow or claim to follow CSR activities. A similar approach has also been used for other SADC EPA States. For Botswana, illustrative examples include Botswana Power Corporation, Bank of Botswana, Botswana Housing Corporation, Botswana Oil, Botswana Railways and G4S Botswana.

⁶² See: <https://unglobalcompact.org/what-is-gc/participants?page=3>

⁶³ Examples include the Eswatini Sugar Association, the Central Bank of Eswatini, the Eswatini Revenue Service, Standard Bank, Royal Eswatini Sugar, the Eswatini Water Services Corporation, and Ubombo Sugar Limited.

For example, two orange producers, one lemon producer and one sugarcane producer from Eswatini are certified by the Global G.A.P.⁶⁴ (based on the Global G.A.P. database).

10.4. Lesotho

According to the available evidence, Lesotho has not developed a National Action Plan on Business and Human Rights yet and there is no information about any activities in this area. Likewise, we did not identify any evidence regarding its wider CSR policy. Moreover, like in the case of Eswatini, any reference to CSR can be found on websites of individual companies or other organisations. However, as outlined above, also in Lesotho, there are declarations of support to education, health, sports, environment, infrastructure, fight against GBV, and other projects benefitting local communities, while the available evidence of actual delivery is limited and often without time indication (which means that it is difficult to establish when the activities have taken place and to what extent the information remains up to date). Listed activities include, e.g., donations of hygiene products, computers, desks, and books to schools, installation of internet in schools, tree planting in a local community, support to sports teams with donations or sponsoring of equipment and donations to orphanages. The reviewed examples include representatives of telecoms, extractive industry, banking, utilities (water and sewage), and security services.⁶⁵ The literature (Okyere, 2019) also suggests that CSR activities (although without a further detail on their type) are pursued by MSMEs from the textile industry in Lesotho (the study surveyed ten of such enterprises operating in the Thetsane industrial estate in Maseru).

Moreover, one company (providing accounting services) and one business association from Lesotho have signed up to the UN Global Compact (UN Global Compact, no date).

10.5. Mozambique

The 2014 Mining Law requires integration of CSR activities into operation of the extractive industry to ensure sustainable development and poverty reduction in Mozambique. It also sets out a requirement to include CSR into local development plans (Kaufmann, Simons-Kaufmann, 2016). At the time, CSR activities were mainly linked with large companies and foreign investment and less with Mozambiquan businesses. There was also a discussion to what extent CSR commitments should be used to guarantee compliance with the national legislation (as weakness of public institutions and corruption caused a gap between legal obligations and their actual implementation and enforcement) and to what extent they should go beyond and above what is obligatory (Kaufmann, Simons-Kaufmann, 2016). As the more recent evidence shows (Pirio, Pittelli, Adam, 2020), the above requirements have not been followed at least in part of the investment projects in extractive industries when resettlement of local communities created problems with land ownership, jobs (fishermen communities were moved away from the seaside and jobs in the investment area were offered to external workers brought in by investors and to migrants from Zimbabwe) and human rights abuses against artisanal miners.

According to the available evidence, Mozambique has not developed a National Action Plan on Business and Human Rights yet. However, a process which may lead to its development has started and has been led by civil society. In 2017, a training session and consultations with relevant stakeholders were held on links between business and human rights. As a result, the National Human Rights Commission has expressed interest in the process and the Ministry of Industry and Commerce expressed interest in leading it. The Action Plan may focus on extractive industries and security, among others (UN OHCHR, no date; the

⁶⁴ Elements checked by the Global G.A.P. during the certification process include respect for health and safety at work and workers' welfare, animal welfare, environment (incl. biodiversity) and food safety and traceability.

⁶⁵ Examples include Letseng Diamonds, Central Bank of Lesotho, G4S in Lesotho, WASCO, Econet Lesotho.

Danish Institute for Human Rights, no date). Moreover, in 2021 the Government expressed interest in engaging with the Voluntary Principles on Security and Human Rights which are a set of international standards providing a regulatory framework for relations between extractive industry companies, state and private security agencies and local communities to ensure an operational security of extractive industry and an avoidance of human rights abuses (Vandome, Vines, 2021).

Also, 14 companies and NGOs from Mozambique have signed up to the UN Global Compact. They represent diverse sectors, including security services, construction, banking, retail trade, and automotive industry (UN Global Compact, no date).

10.6. Namibia

According to the available evidence, Namibia has not developed a National Action Plan on Business and Human Rights yet and there is no information about any activities in this area. Likewise, we did not identify any evidence regarding its wider CSR policy.

References to CSR are linked to individual businesses. According to literature (Marenga, Kakujaha-Matundu, 2019), in Namibia, this is largely a sphere of foreign investors and big companies which use CSR activities to improve the brand image and attract customers, increase sales, and make further profits, for the eventual benefit of their shareholders. At the same time, those companies have funds for additional activities and some of their CSR projects make a difference for the local communities. The study provides an example of one of the banks which through its own donations, crowdfunding and dedicated events collects funds for new houses for families living in shacks. Reportedly, between 2015 and 2020, funds for almost 600 such houses have been collected (Windhoek Observer, 2020; Garises, 2022). Other examples include encouraging employees to engage in voluntary activities in local communities chosen in cooperation with NGOs (Standard Bank, 2021), cleaning campaigns in towns, provision of training for persons with disabilities, funding for technical and vocational education and training, and donations of office equipment and computers to schools.⁶⁶

There are no signatories from Namibia yet to the UN Global Compact (UN Global Compact, no date). Regarding examples of adherence to the sustainability certification schemes, 13 producers of table grapes from Namibia are certified by the Global G.A.P. (based on the Global G.A.P. database).

10.7. South Africa

In South Africa, the Government has not committed to the development of the National Action Plan on Business and Human Rights and to-date, civil society and academia has led efforts to develop materials related to the matter. In 2016, the Centre for Human Rights at the University of Pretoria published the "shadow" national baseline assessment of the implementation of business and human rights frameworks in South Africa and in 2015, the Danish Institute for Human Rights and the South African Human Rights Commission published a human rights and business country guide for South Africa. It includes sector profiles covering agriculture, construction, and extractive industry, with a description of areas for attention from the point of view of potential human rights violations, and profiles of South African regions where human rights conditions differ substantially in nature or scale from the national average. The guide should help businesses operating in South Africa to adapt their activities (The Danish Institute for Human Rights, 2023).

Moreover, the Committee on Corporate Governance chaired by former Supreme Court Judge Mervyn King issued in 1994, 2002, and 2009 three reports (called King I, II and III)

⁶⁶ Companies used as examples include also NAMCOR (oil industry), Bank of Namibia, and Bank Windhoek.

providing guidance on corporate governance, including CSR activities and non-financial reporting. Since 2002, companies listed on Johannesburg Stock-Exchange were required to follow this guidance or explain why they have not done so. There are also examples of large companies, including in extractive industries, engaging in social and environmental projects and projects benefitting local communities (Business in South Africa, no date).

Also, 97 companies and NGOs from South Africa have signed up to the UN Global Compact. They represent several sectors, including financial services, renewable energy, extractive industries, real estate, construction, utilities, retail trade, tourism, IT, telecommunication, media, medical devices and health care, aerospace, electrical and electronic equipment, food production, beverages, and chemicals (UN Global Compact, no date).

Regarding examples of adherence to the sustainability certification schemes, 338 table grapes producers, 377 apple producers, 586 orange producers and 626 lemon producers from South Africa are certified by the Global G.A.P. (based on the Global G.A.P. database).

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Appendix C2: Calculated EPA effects for sectoral labour**Table 1: Sectoral labour impacts in the EU27 (% changes compared to baseline, 2022, except where noted)**

Sector	Scenario A		Scenario B		Share in labour expenditure (% of total)
	Unskilled	Skilled	Unskilled	Skilled	
1 Rice	-0.01	-0.01	0.00	0.00	0.02
2 Wheat	0.02	0.02	0.66	0.66	0.10
3 Other Grains	0.00	0.00	0.02	0.02	0.08
4 Vegetables, fruit, nuts	-0.09	-0.09	-0.22	-0.22	0.73
5 Oil Seeds	0.00	0.00	0.07	0.07	0.20
6 Sugar	-1.10	-1.10	-0.96	-0.96	0.05
7 Fibres crops	0.00	0.00	0.00	0.00	0.02
8 Other Crops	-0.01	-0.01	-0.02	-0.02	0.12
9 Cattle	0.01	0.01	0.07	0.07	0.40
10 Other primary	0.01	0.01	0.02	0.02	0.31
11 Forestry	0.01	0.01	0.03	0.03	0.12
12 Fishing	-0.01	-0.01	0.00	0.00	0.03
13 Coal	-0.01	-0.02	-0.03	-0.03	0.10
14 Oil	-0.01	-0.01	-0.02	-0.02	0.02
15 Gas	-0.03	-0.03	-0.08	-0.07	0.03
16 Oil products	0.00	0.00	0.00	0.00	0.05
17 Electricity	0.01	0.01	0.02	0.02	0.78
18 Minerals	0.01	0.01	0.03	0.03	0.22
19 Cement	0.01	0.01	0.06	0.06	0.79
20 Ruminant meat	-0.01	-0.01	0.01	0.01	0.14
21 Other Meat	0.02	0.02	0.14	0.14	0.28
22 Vegetable Oils	0.00	0.00	0.13	0.13	0.05
23 Dairy products	0.01	0.01	0.03	0.03	0.26
24 Other prepared Food	-0.01	-0.01	0.01	0.01	1.30
25 Beverages, tobacco products	0.00	0.00	-0.01	-0.01	0.44
26 Textiles	0.07	0.07	0.12	0.12	0.44
27 Wearing	0.21	0.21	0.16	0.16	0.36
28 Leather	0.10	0.10	0.13	0.13	0.22
29 Wood and products	0.00	0.00	0.03	0.03	0.36
30 Paper & Paper Products	0.02	0.02	0.05	0.05	1.20
31 Chemicals	0.00	0.00	0.04	0.04	1.15
32 Pharmaceuticals	-0.01	-0.01	-0.02	-0.02	0.57
33 Rubber and plastics products	0.05	0.05	0.13	0.13	1.38
34 Iron & Steel	0.01	0.01	0.03	0.03	0.75
35 Metal products	0.00	0.00	-0.03	-0.03	2.55
36 Computer, electronic, optical products	-0.02	-0.02	0.08	0.08	1.55
37 Electrical equipment	0.01	0.01	-0.02	-0.02	1.45
38 Machinery and equipment	0.00	0.00	0.03	0.03	2.93
39 Motor vehicles and parts	0.13	0.13	0.03	0.03	1.51
40 Other transport equipment	-0.02	-0.02	-0.05	-0.05	0.61
41 Other Manufacturing	0.00	0.00	0.05	0.05	1.28
42 Construction	0.01	0.01	0.02	0.02	4.30
43 Trade services	0.01	0.01	0.02	0.02	11.98
44 Land Transport	0.01	0.01	0.02	0.01	2.45
45 Water Transport	0.02	0.02	0.05	0.05	0.20
46 Air Transport	0.01	0.01	0.03	0.03	0.22
47 Commercial services	0.01	0.01	0.01	0.01	19.24
48 Finance services	0.01	0.01	0.01	0.01	4.85
49 Public services	0.01	0.01	0.02	0.02	31.82
Total	0.01	0.01	0.02	0.02	100.00

Source: Simulations by the European Commission; and calculations by the study team. Note: the data represent the total expenditure in the sector for labour = employment times wages.

Table 2: Sectoral labour impacts in Botswana (% changes compared to baseline, 2022, except where noted)

Sector	Scenario A		Scenario B		Share in labour expenditure (% of total)
	Unskilled	Skilled	Unskilled	Skilled	
1 Rice	0.25	0.25	1.15	1.15	0.00
2 Wheat	0.19	0.18	-5.46	-5.47	0.04
3 Other Grains	0.30	0.29	0.52	0.51	0.01
4 Vegetables, fruit, nuts	0.20	0.19	0.37	0.36	0.40
5 Oil Seeds	0.15	0.15	0.28	0.27	0.00
6 Sugar	0.52	0.51	1.13	1.12	0.01
7 Fibres crops	0.07	0.06	-0.10	-0.11	0.00
8 Other Crops	1.02	1.01	1.25	1.24	0.00
9 Cattle	0.77	0.76	0.73	0.72	0.72
10 Other primary	0.21	0.20	-0.18	-0.19	0.08
11 Forestry	0.12	0.11	0.09	0.08	0.28
12 Fishing	0.19	0.18	0.10	0.09	0.03
13 Coal	-0.06	-0.03	0.09	0.12	2.07
14 Oil	0.09	0.08	0.21	0.20	0.00
15 Gas	0.13	0.12	0.33	0.31	0.00
16 Oil products	0.11	0.11	0.43	0.44	0.02
17 Electricity	0.15	0.16	0.48	0.48	0.46
18 Minerals	0.02	0.01	0.05	0.04	3.62
19 Cement	0.07	0.08	0.29	0.29	0.59
20 Ruminant meat	1.86	1.86	1.86	1.86	0.17
21 Other Meat	0.52	0.53	0.56	0.56	0.07
22 Vegetable Oils	0.34	0.34	0.62	0.62	0.00
23 Dairy products	0.12	0.12	-1.00	-1.00	0.08
24 Other prepared Food	0.28	0.28	0.54	0.54	0.57
25 Beverages, tobacco products	0.14	0.14	0.05	0.05	0.52
26 Textiles	-1.79	-1.78	-2.95	-2.95	0.02
27 Wearing	-2.34	-2.33	-2.08	-2.08	0.13
28 Leather	-0.66	-0.66	-0.75	-0.75	0.03
29 Wood and products	0.11	0.12	0.66	0.67	0.03
30 Paper & Paper Products	0.06	0.06	-0.05	-0.05	0.18
31 Chemicals	0.03	0.03	-0.27	-0.26	0.10
32 Pharmaceuticals	0.05	0.05	0.53	0.54	0.02
33 Rubber and plastics products	-0.53	-0.53	-1.79	-1.79	0.15
34 Iron & Steel	0.10	0.11	0.48	0.49	0.13
35 Metal products	0.06	0.06	-0.19	-0.19	0.53
36 Computer, electronic, optical products	-0.06	-0.06	-2.80	-2.80	0.05
37 Electrical equipment	-0.33	-0.33	0.72	0.73	0.04
38 Machinery and equipment	0.06	0.06	0.89	0.89	0.13
39 Motor vehicles and parts	-1.49	-1.48	-2.69	-2.69	0.14
40 Other transport equipment	-0.25	-0.25	-0.27	-0.26	0.06
41 Other Manufacturing	2.32	2.32	2.32	2.32	0.04
42 Construction	0.12	0.10	-0.04	-0.05	5.48
43 Trade services	0.22	0.21	0.05	0.04	9.11
44 Land Transport	0.12	0.11	-0.09	-0.10	0.79
45 Water Transport	0.11	0.10	-0.14	-0.16	0.00
46 Air Transport	0.10	0.09	-0.09	-0.10	0.15
47 Commercial services	-0.05	-0.05	-0.14	-0.14	9.61
48 Finance services	0.10	0.10	-0.02	-0.01	6.32
49 Public services	0.10	0.10	-0.05	-0.04	57.02
Total	0.10	0.09	-0.02	-0.04	100.00

Source: Simulations by the European Commission; and calculations by the study team. Note: the data represent the total expenditure in the sector for labour = employment times wages.

Table 3: Sectoral labour impacts in Eswatini (% changes compared to baseline, 2022, except where noted)

Sector	Scenario A		Scenario B		Share in labour expenditure (% of total)
	Unskilled	Skilled	Unskilled	Skilled	
1 Rice	0.13	0.13	0.04	0.05	0.54
2 Wheat	0.34	0.30	-2.34	-2.41	0.00
3 Other Grains	-0.03	-0.08	-0.27	-0.33	0.14
4 Vegetables, fruit, nuts	-0.10	-0.14	-0.90	-0.96	0.67
5 Oil Seeds	0.01	-0.03	0.10	0.03	0.01
6 Sugar	0.13	0.09	0.54	0.48	3.90
7 Fibres crops	0.20	0.16	0.60	0.53	0.03
8 Other Crops	0.25	0.20	0.09	0.02	0.02
9 Cattle	-0.13	-0.18	-0.61	-0.68	1.11
10 Other primary	-0.04	-0.08	-2.20	-2.27	0.11
11 Forestry	0.25	0.20	-0.04	-0.12	0.09
12 Fishing	-0.17	-0.21	-0.69	-0.76	0.06
13 Coal	1.07	1.24	4.15	4.42	0.14
14 Oil	0.27	0.23	0.18	0.12	0.00
15 Gas	-0.18	-0.23	-0.03	-0.12	0.01
16 Oil products	0.31	0.33	0.54	0.57	0.04
17 Electricity	0.43	0.44	1.23	1.26	0.58
18 Minerals	-0.10	-0.15	-0.60	-0.68	0.43
19 Cement	0.28	0.29	0.52	0.55	0.30
20 Ruminant meat	0.19	0.20	0.09	0.10	0.32
21 Other Meat	-0.09	-0.08	-0.64	-0.63	1.21
22 Vegetable Oils	0.17	0.17	-0.15	-0.14	0.36
23 Dairy products	0.20	0.21	-2.97	-2.96	0.06
24 Other prepared Food	0.28	0.29	-4.19	-4.17	2.39
25 Beverages, tobacco products	-0.02	-0.01	-0.44	-0.42	0.10
26 Textiles	-1.76	-1.74	-1.35	-1.33	4.82
27 Wearing	-6.15	-6.13	-2.79	-2.76	4.97
28 Leather	-0.20	-0.19	1.35	1.37	0.13
29 Wood and products	0.57	0.58	-1.15	-1.13	0.77
30 Paper & Paper Products	-0.01	0.00	-0.24	-0.21	0.79
31 Chemicals	0.74	0.75	-0.49	-0.47	18.93
32 Pharmaceuticals	0.40	0.41	1.13	1.16	1.10
33 Rubber and plastics products	0.02	0.04	-0.55	-0.52	0.39
34 Iron & Steel	0.52	0.53	2.00	2.02	0.04
35 Metal products	0.82	0.83	3.02	3.04	0.20
36 Computer, electronic, optical products	0.37	0.38	2.47	2.50	0.17
37 Electrical equipment	0.36	0.38	2.03	2.05	0.25
38 Machinery and equipment	0.39	0.40	2.31	2.33	0.30
39 Motor vehicles and parts	-3.24	-3.22	-4.50	-4.48	0.10
40 Other transport equipment	-0.01	0.00	1.90	1.92	0.07
41 Other Manufacturing	0.27	0.28	0.46	0.49	0.18
42 Construction	-0.19	-0.24	-0.25	-0.34	0.41
43 Trade services	-0.23	-0.29	-0.88	-0.97	2.19
44 Land Transport	-0.26	-0.32	-0.77	-0.86	0.41
45 Water Transport	-0.11	-0.17	-0.36	-0.46	0.00
46 Air Transport	-0.18	-0.23	-0.43	-0.52	0.06
47 Commercial services	0.51	0.52	0.47	0.48	8.79
48 Finance services	-0.27	-0.25	-0.51	-0.49	4.40
49 Public services	-0.14	-0.13	-0.86	-0.84	37.93
Total	-0.23	-0.28	-0.66	-0.75	100.00

Source: Simulations by the European Commission; and calculations by the study team. Note: the data represent the total expenditure in the sector for labour = employment times wages.

Table 4: Sectoral labour impacts in Lesotho (% changes compared to baseline, 2022, except where noted)

Sector	Scenario A		Scenario B		Share in labour expenditure (% of total)
	Unskilled	Skilled	Unskilled	Skilled	
1 Rice	0.11	0.11	0.02	0.02	0.45
2 Wheat	0.37	0.34	-12.67	-12.68	0.00
3 Other Grains	0.10	0.08	-0.05	-0.06	0.15
4 Vegetables, fruit, nuts	0.08	0.06	-0.24	-0.25	0.55
5 Oil Seeds	0.21	0.19	0.55	0.54	0.01
6 Sugar	0.10	0.08	-0.29	-0.30	1.08
7 Fibres crops	0.57	0.55	0.28	0.27	0.01
8 Other Crops	0.18	0.16	0.26	0.25	0.04
9 Cattle	0.13	0.11	-0.19	-0.20	0.70
10 Other primary	-0.52	-0.54	-1.93	-1.94	0.06
11 Forestry	0.06	0.04	0.45	0.44	0.03
12 Fishing	0.09	0.06	-0.16	-0.17	0.08
13 Coal	0.23	0.31	0.53	0.57	0.05
14 Oil	0.08	0.06	0.10	0.09	0.00
15 Gas	-0.01	-0.03	0.02	0.01	0.01
16 Oil products	0.08	0.09	0.46	0.46	0.20
17 Electricity	0.00	0.01	0.33	0.34	1.02
18 Minerals	0.00	-0.03	0.04	0.03	5.61
19 Cement	0.05	0.05	0.26	0.26	0.00
20 Ruminant meat	0.19	0.19	0.04	0.04	0.20
21 Other Meat	0.15	0.16	0.01	0.02	0.76
22 Vegetable Oils	0.18	0.18	0.04	0.05	0.29
23 Dairy products	0.07	0.07	-2.00	-2.00	0.04
24 Other prepared Food	0.11	0.12	-2.69	-2.69	0.77
25 Beverages, tobacco products	0.17	0.17	-0.01	0.00	0.02
26 Textiles	1.70	1.71	1.21	1.21	8.80
27 Wearing	-1.31	-1.30	-0.44	-0.44	14.23
28 Leather	-1.85	-1.85	-1.49	-1.49	0.26
29 Wood and products	0.10	0.11	0.67	0.67	0.39
30 Paper & Paper Products	-0.24	-0.23	-0.75	-0.75	0.72
31 Chemicals	0.12	0.13	0.70	0.71	0.78
32 Pharmaceuticals	0.06	0.06	0.17	0.18	0.78
33 Rubber and plastics products	0.01	0.02	0.18	0.19	0.21
34 Iron & Steel	0.12	0.12	0.98	0.99	0.00
35 Metal products	0.08	0.09	1.03	1.03	0.04
36 Computer, electronic, optical products	-0.11	-0.10	-7.14	-7.14	0.33
37 Electrical equipment	-0.02	-0.01	1.65	1.65	0.61
38 Machinery and equipment	-0.02	-0.01	0.62	0.62	0.17
39 Motor vehicles and parts	-3.89	-3.88	-6.19	-6.19	0.12
40 Other transport equipment	-0.68	-0.67	0.37	0.38	0.17
41 Other Manufacturing	0.00	0.01	-1.73	-1.73	0.18
42 Construction	-0.05	-0.08	-0.11	-0.13	0.20
43 Trade services	0.08	0.05	-0.40	-0.41	1.84
44 Land Transport	0.00	-0.03	-0.29	-0.30	0.36
45 Water Transport	-0.03	-0.06	-0.16	-0.18	0.00
46 Air Transport	-0.10	-0.13	-0.05	-0.06	0.77
47 Commercial services	0.21	0.22	0.10	0.10	10.61
48 Finance services	0.05	0.06	-0.27	-0.27	4.33
49 Public services	-0.04	-0.03	-0.48	-0.48	41.97
Total	-0.02	-0.05	-0.21	-0.22	100.00

Source: Simulations by the European Commission; and calculations by the study team. Note: the data represent the total expenditure in the sector for labour = employment times wages.

Table 5: Sectoral labour impacts in Mozambique (% changes compared to baseline, 2022, except where noted)

Sector	Scenario A		Scenario B		Share in labour expenditure (% of total)
	Unskilled	Skilled	Unskilled	Skilled	
1 Rice	0.15	0.21	0.07	0.14	0.48
2 Wheat	-0.62	-0.56	-0.71	-0.63	1.83
3 Other Grains	0.05	0.12	-0.04	0.04	2.55
4 Vegetables, fruit, nuts	0.13	0.20	0.05	0.13	18.39
5 Oil Seeds	0.19	0.26	0.13	0.21	1.40
6 Sugar	0.00	0.01	0.07	0.09	0.80
7 Fibres crops	0.27	0.33	0.17	0.24	0.30
8 Other Crops	0.11	0.18	0.08	0.16	0.49
9 Cattle	-0.17	-0.11	-0.27	-0.20	3.11
10 Other primary	-0.22	-0.15	-0.33	-0.25	0.68
11 Forestry	0.34	0.41	0.24	0.32	1.99
12 Fishing	0.12	0.19	-0.01	0.07	0.07
13 Coal	0.90	0.63	0.89	0.58	14.45
14 Oil	0.52	0.58	0.34	0.41	0.03
15 Gas	0.72	0.70	2.18	2.16	0.83
16 Oil products	0.00	-0.03	0.04	0.01	0.02
17 Electricity	0.24	0.21	0.18	0.15	6.67
18 Minerals	0.34	0.42	0.24	0.32	0.49
19 Cement	-0.02	-0.04	-0.07	-0.10	0.27
20 Ruminant meat	-1.56	-1.57	-1.33	-1.34	0.07
21 Other Meat	-9.00	-9.01	-8.55	-8.56	0.03
22 Vegetable Oils	0.20	0.19	0.04	0.02	0.57
23 Dairy products	-1.45	-1.46	-1.90	-1.91	0.20
24 Other prepared Food	-0.15	-0.16	-0.70	-0.71	1.09
25 Beverages, tobacco products	0.53	0.52	0.38	0.36	0.68
26 Textiles	-0.20	-0.22	-0.96	-0.99	0.05
27 Wearing	0.01	-0.01	0.01	-0.02	0.06
28 Leather	0.63	0.61	0.75	0.72	0.01
29 Wood and products	0.32	0.30	0.20	0.18	0.26
30 Paper & Paper Products	-1.84	-1.86	-2.84	-2.87	1.01
31 Chemicals	0.39	0.37	0.16	0.13	0.22
32 Pharmaceuticals	-0.18	-0.21	-0.22	-0.25	0.02
33 Rubber and plastics products	-1.31	-1.33	-1.17	-1.20	0.18
34 Iron & Steel	0.05	0.03	-0.64	-0.67	0.00
35 Metal products	-0.16	-0.18	-2.03	-2.06	0.00
36 Computer, electronic, optical products	-4.37	-4.40	-5.07	-5.09	0.00
37 Electrical equipment	-2.89	-2.91	-2.96	-2.98	0.00
38 Machinery and equipment	-0.80	-0.82	-1.03	-1.05	0.01
39 Motor vehicles and parts	-0.54	-0.57	-1.28	-1.31	0.20
40 Other transport equipment	-0.17	-0.19	-0.32	-0.35	0.08
41 Other Manufacturing	-0.33	-0.35	-1.52	-1.55	0.63
42 Construction	0.27	0.36	0.12	0.22	1.22
43 Trade services	-0.01	0.08	-0.19	-0.08	2.60
44 Land Transport	0.20	0.29	0.08	0.19	5.62
45 Water Transport	0.18	0.27	0.21	0.31	0.19
46 Air Transport	0.12	0.21	0.05	0.15	0.20
47 Commercial services	0.14	0.16	0.04	0.07	5.47
48 Finance services	-0.09	-0.11	-0.20	-0.23	1.61
49 Public services	0.19	0.17	0.10	0.08	22.86
Total	0.16	0.25	0.07	0.17	100.00

Source: Simulations by the European Commission; and calculations by the study team. Note: the data represent the total expenditure in the sector for labour = employment times wages.

Table 6: Sectoral labour impacts in Namibia (% changes compared to baseline, 2022, except where noted)

Sector	Scenario A		Scenario B		Share in labour expenditure (% of total)
	Unskilled	Skilled	Unskilled	Skilled	
1 Rice	-0.35	-0.36	-0.39	-0.39	0.00
2 Wheat	4.39	3.80	-1.78	-2.30	0.00
3 Other Grains	5.23	4.65	4.76	4.27	0.16
4 Vegetables, fruit, nuts	5.88	5.30	5.85	5.36	0.58
5 Oil Seeds	-0.63	-1.25	-1.71	-2.24	0.00
6 Sugar	2.44	2.39	2.22	2.19	0.00
7 Fibres crops	1.61	1.00	1.38	0.87	0.00
8 Other Crops	5.30	4.72	5.96	5.48	0.00
9 Cattle	3.19	2.60	2.61	2.11	1.05
10 Other primary	2.84	2.25	2.23	1.73	0.14
11 Forestry	2.96	2.31	2.50	1.95	0.48
12 Fishing	5.67	5.05	4.95	4.42	2.12
13 Coal	10.65	12.83	10.59	12.45	0.00
14 Oil	0.62	0.12	0.66	0.23	0.00
15 Gas	1.03	0.21	1.01	0.31	0.00
16 Oil products	-0.15	0.07	-0.17	0.01	0.02
17 Electricity	-0.52	-0.30	0.22	0.40	1.62
18 Minerals	0.86	0.20	0.78	0.22	3.13
19 Cement	0.30	0.52	0.32	0.50	0.29
20 Ruminant meat	8.58	8.67	8.60	8.67	0.32
21 Other Meat	-2.56	-2.45	-6.26	-6.17	0.28
22 Vegetable Oils	-2.65	-2.55	-2.74	-2.65	0.00
23 Dairy products	2.37	2.47	1.93	2.01	0.67
24 Other prepared Food	9.99	10.08	9.03	9.10	2.62
25 Beverages, tobacco products	2.05	2.15	1.60	1.68	1.59
26 Textiles	1.14	1.35	0.91	1.09	0.80
27 Wearing	-0.05	0.17	0.37	0.55	0.19
28 Leather	3.22	3.43	3.47	3.65	0.05
29 Wood and products	0.68	0.90	0.68	0.87	0.19
30 Paper & Paper Products	0.03	0.24	0.09	0.27	0.72
31 Chemicals	0.85	1.07	1.30	1.48	0.78
32 Pharmaceuticals	0.07	0.28	0.52	0.70	0.11
33 Rubber and plastics products	-1.01	-0.79	-1.13	-0.95	0.44
34 Iron & Steel	-1.25	-1.03	-0.92	-0.73	0.17
35 Metal products	3.70	3.91	3.12	3.30	1.85
36 Computer, electronic, optical products	-1.63	-1.41	-2.48	-2.29	0.27
37 Electrical equipment	-3.17	-2.94	-1.97	-1.79	0.16
38 Machinery and equipment	-3.20	-2.98	-2.83	-2.65	0.48
39 Motor vehicles and parts	-2.92	-2.70	-4.73	-4.54	0.26
40 Other transport equipment	-8.47	-8.23	-7.27	-7.08	1.43
41 Other Manufacturing	-1.03	-0.81	-0.82	-0.64	0.17
42 Construction	1.86	1.04	1.59	0.89	0.74
43 Trade services	0.86	0.03	0.75	0.05	9.18
44 Land Transport	1.31	0.49	1.03	0.33	2.43
45 Water Transport	1.02	0.20	0.76	0.06	0.13
46 Air Transport	-0.42	-1.26	-0.47	-1.17	0.68
47 Commercial services	0.89	1.04	0.77	0.89	8.64
48 Finance services	0.99	1.20	0.83	1.01	2.34
49 Public services	2.68	2.89	2.28	2.45	52.71
Total	2.32	1.51	1.99	1.30	100.00

Source: Simulations by the European Commission; and calculations by the study team. Note: the data represent the total expenditure in the sector for labour = employment times wages.

Table 7: Sectoral labour impacts in South Africa (% changes compared to baseline, 2022, except where noted)

Sector	Scenario A		Scenario B		Share in labour expenditure (% of total)
	Unskilled	Skilled	Unskilled	Skilled	
1 Rice	0.02	0.02	0.11	0.11	0.04
2 Wheat	1.92	1.90	-6.28	-6.33	0.02
3 Other Grains	1.01	1.00	1.29	1.25	0.10
4 Vegetables, fruit, nuts	2.34	2.32	6.40	6.36	0.26
5 Oil Seeds	0.17	0.16	0.64	0.60	0.03
6 Sugar	6.29	6.28	6.54	6.53	0.11
7 Fibres crops	-0.31	-0.33	-1.16	-1.21	0.01
8 Other Crops	-0.04	-0.06	1.26	1.22	0.01
9 Cattle	2.08	2.07	2.42	2.38	0.47
10 Other primary	0.15	0.13	-0.06	-0.10	0.13
11 Forestry	0.05	0.04	0.05	0.00	0.03
12 Fishing	0.28	0.26	0.59	0.54	0.05
13 Coal	-0.19	-0.13	-1.06	-0.88	1.23
14 Oil	-0.03	-0.04	-0.75	-0.79	0.00
15 Gas	-0.76	-0.78	-2.31	-2.37	0.02
16 Oil products	0.05	0.05	0.12	0.13	0.12
17 Electricity	0.08	0.09	0.58	0.60	2.96
18 Minerals	0.01	-0.01	1.06	1.01	4.43
19 Cement	0.07	0.08	-0.51	-0.50	0.47
20 Ruminant meat	0.10	0.10	0.67	0.68	0.11
21 Other Meat	-0.09	-0.09	-2.22	-2.21	0.20
22 Vegetable Oils	0.29	0.29	0.48	0.49	0.73
23 Dairy products	0.03	0.03	-1.23	-1.23	0.00
24 Other prepared Food	0.43	0.43	3.61	3.61	0.58
25 Beverages, tobacco products	0.50	0.50	2.06	2.07	0.61
26 Textiles	-0.64	-0.63	-0.65	-0.63	0.16
27 Wearing	-2.68	-2.68	-2.41	-2.39	0.19
28 Leather	-1.29	-1.28	0.35	0.36	0.06
29 Wood and products	0.17	0.18	0.01	0.03	0.22
30 Paper & Paper Products	-0.21	-0.20	-0.92	-0.90	0.98
31 Chemicals	-0.13	-0.12	1.07	1.08	1.25
32 Pharmaceuticals	0.06	0.06	-0.12	-0.10	0.20
33 Rubber and plastics products	-0.78	-0.77	-2.37	-2.35	0.45
34 Iron & Steel	0.00	0.01	-0.16	-0.14	0.28
35 Metal products	-0.26	-0.25	1.39	1.41	1.39
36 Computer, electronic, optical products	0.28	0.28	-2.10	-2.08	0.80
37 Electrical equipment	-0.17	-0.16	-0.38	-0.36	0.49
38 Machinery and equipment	-0.32	-0.31	-1.88	-1.86	0.29
39 Motor vehicles and parts	2.50	2.50	14.58	14.60	1.31
40 Other transport equipment	1.17	1.17	2.72	2.74	0.21
41 Other Manufacturing	-0.29	-0.28	-1.87	-1.86	0.50
42 Construction	0.19	0.17	1.09	1.03	2.98
43 Trade services	0.31	0.29	1.20	1.14	10.43
44 Land Transport	0.21	0.19	1.11	1.05	1.91
45 Water Transport	0.15	0.13	0.59	0.53	0.09
46 Air Transport	0.13	0.11	0.56	0.50	0.41
47 Commercial services	0.11	0.11	0.64	0.65	15.40
48 Finance services	0.14	0.15	0.86	0.87	7.74
49 Public services	0.14	0.15	0.89	0.90	39.53
Total	0.19	0.17	1.02	0.96	100.00

Source: Simulations by the European Commission; and calculations by the study team. Note: the data represent the total expenditure in the sector for labour = employment times wages.

APPENDIX D: DETAILED ANALYSES RELATED TO THE ENVIRONMENTAL IMPACT OF THE EPA

Appendix D1: Ratification of Multilateral Environmental Conventions

The analysis related to the environmental impact of the EPA includes an assessment on the ratification and implementation of Multilateral Environmental Conventions. Table 1 provides an overview of which MEAs are included in this assessment. Table 2 on the following page lists the dates of ratification of these MEAs for each of the SADC EPA States.

Table 1: Overview of Multilateral Environmental Conventions (MEAs) included in the analysis

Climate Change
<ul style="list-style-type: none"> UNFCCC: United Nations Framework Convention on Climate Change Paris: Paris Agreement
Biodiversity and Wildlife
<ul style="list-style-type: none"> UNCCD: UN Convention to Combat Desertification CBD: Convention on Biological Diversity Cartagena: Cartagena Protocol on Biosafety to the Convention on Biological Diversity CITES: Convention on International Trade in Endangered Species of Wild Fauna and Flora
Air pollution
<ul style="list-style-type: none"> Montreal: Montreal Protocol on Substances that Deplete the Ozone Layer Kigali: Kigali Amendment to the Montreal Protocol on Substances that Deplete the Ozone Layer
Water
<ul style="list-style-type: none"> RAMSAR: Ramsar Convention on Wetlands of International Importance Especially as Waterfowl Habitat
Waste and Chemicals*
<ul style="list-style-type: none"> Basel: Basel Convention on the Control of Transboundary Movements of Hazardous Wastes and their Disposal Stockholm: Stockholm Convention on Persistent Organic Pollutants Rotterdam: Rotterdam Convention on the Prior Informed Consent Procedure for Certain Hazardous Chemicals and Pesticides in International Trade

* SADC Parties have also agreed to adopt the 1994 Bamako Convention on movement of hazardous wastes within Africa, which came into force in 1998. Although this is a multilateral environmental agreement, we have not analysed this as it has no direct relation to the EU.

Table 2: Date of ratification or acceptance of MEAs for each of the SADC EPA States

	UNFCCC	Paris	UNCCD	CBD	Cartagena	CITES	Montreal	Kigali	Ramsar	Basel	Stockholm	Rotterdam
Botswana	27.01.1994	11.11.2016	11.09.1996	12.10.1995	11.06.2002	14.11.1977	04.12.1991	19.09.2020	09.04.1997	20.05.1998	28.10.2002	05.02.2008
Eswatini	07.10.1996	21.09.2016	07.10.1996	09.11.1994	13.01.2006	26.02.1997	10.11.1992	24.11.2020	15.06.2013	08.08.2005	13.01.2006	24.12.2012
Lesotho	07.02.1995	20.01.2017	12.09.1995	10.01.1995	20.09.2001	01.10.2003	25.03.1994	07.10.2019	01.11.2004	31.05.2000	23.01.2002	30.05.2008
Mozambique	25.08.1995	04.06.2018	13.03.1997	25.08.1995	21.10.2002	25.03.1981	09.09.1994	16.01.2020	03.12.2004	13.03.1997	31.10.2005	15.04.2010
Namibia	16.05.1995	21.09.2016	16.05.1997	16.05.1997	10.02.2005	18.12.1990	20.09.1993	16.05.2019	23.12.1995	15.05.1995	24.06.2005	24.06.2005
South Africa	29.08.1997	01.11.2016	30.09.1997	02.11.1995	14.08.2003	15.07.1975	15.01.1990	01.08.2019	21.12.1975	05.05.1994	04.09.2002	04.09.2002

Appendix D2: Country Report Botswana

1. ENVIRONMENTAL BASELINES

1.1. Climate change

With semi-arid climate and highly erratic rainfall, Botswana has a high degree of risk to natural hazards. The country experiences recurrent droughts and is prone to desertification. Droughts are likely to increase, particularly in the northern, eastern and central areas of the country, given the projected trends of decline in rainfall for much of the country. In general, projected warming trends coupled with decreased rainfall are likely to exacerbate water stress across the country, although climate change is also expected to increase the risk and intensity of flooding (WBG, 2020 and Republic of Botswana, 2019a). Temperature rise coupled with increase in the frequency and intensity of extreme droughts and floods is likely to reduce crop yields and cause a loss in livestock (WBG, 2020 and Republic of Botswana, 2019a). Recurrent droughts and flooding exacerbate land degradation and soil erosion. Botswana’s vulnerability to climate change is also influenced by a combination of socio-economic factors such as the country’s high dependence on natural resources and key sectors that are directly affected by climate change (agriculture, water, tourism, and health), high levels of poverty, structural inequalities, lack of adequate infrastructure, and a low adaptive capacity to deal with climate change (WBG, 2020).

Botswana has a relatively low carbon footprint. In absolute terms, Botswana’s emissions in 2015 stood at 7.13 Mt CO₂e. This accounts for the carbon sink from LULUCF sector. More recent data on the GHG inventory is not available, however some estimates indicate that emissions rose to 9 Mt CO₂e in 2019 before declining to 8.7 Mt CO₂e in 2019 (Republic of Botswana, 2019b). Datasets indicate significantly high variations in the historical emissions for Botswana (Climate Analytics, 2021). For example, while the First Nationally Determined Contributions to the Paris Agreement indicates 2010 emissions as 8.3 MtCO₂e, historical datasets estimate emissions at 27 MtCO₂e (Climate Analytics, 2021). However, data suggests that Botswana has gone from being a net sink of GHG emissions in 2000 to a net emitter in 2015 (see Table 1). The rise in emissions comes mainly from an increase in energy demand which is met through fossil fuels. Oil and coal accounted for close to 80% of the total primary energy in 2019 (Climate Analytics, 2021). In 2021, the installed electricity generation capacity of 890MW was dominated almost entirely by coal resources (99%) (AFDB, 2021). In 2015, the energy sector accounted for 87% of emissions.

Data availability on GHG emissions remains low with official sources reporting data up to 2015. Moreover, one of the main official sources of data viz. Botswana’s reporting to UNFCCC contains calculation errors in reporting.

Table 1: GHG emissions inventory of Botswana for 2015 (Gg CO₂eq)

	GHG Emissions (2015)	GHG Emissions (2000)
Energy	8336.95	4574.30
Industrial Processes and Product Use (IPPU)	1221.69	862.47
Agriculture, Forestry and Land-use	-2803.005	-41156
Agriculture		1707.11
Forestry and Land-use		
Waste	31.66	198.92
Total emissions	9590.3	7342.81
Net Emissions (after subtracting sink)	7131.07	

Source: Republic of Botswana, 2019a and b

There are the uncertainties related to carbon footprint of the agriculture sector (Climate Analytics, 2021). the country’s First Biennial Update Report to the UNFCCC notes that the agriculture sector accounted for 23% and 15% of emissions when excluding land use, land use changes and forestry (LULUF) in 2000 and 2013 respectively. The Third National

Communication to the UNFCCC notes that the agriculture sector had a share of 13.4% when excluding LULUCF emissions in 2015 (Climate Analytics, 2021). However, according to PRIMAP-Hist data, the agriculture sector accounted for 53% of emissions excluding LULUF in 2017 (Climate Analytics, 2021). GHG emissions are projected to increase to 49 MtCO_{2e} by 2030, under a Business as Usual Scenario with energy and Agriculture, Forestry and Other Land Use (AFOLU) sectors identified as major drivers (Republic of Botswana, 2019a).

Botswana ratified the Paris Agreement in 2016. In its First Nationally Determined Contribution to the Paris Agreement, Botswana indicated the intention to reduce total emissions by 15% by 2030 taking 2010 as the base year when emissions stood at 8.317 9 Mt CO_{2e}. The emissions reduction is expected to come primarily from the energy sector. In this NDC, Botswana indicated that it would develop a long term low-carbon strategy. This has not been elaborated upon since the submission of the NDC in 2016. The country has further integrated climate change considerations into the National Development Plan (NDP) 2017-2023, and Vision 2036, which is the national agenda that will guide the country's development plans and activities for the coming years. Botswana is understood to be revising this NDC (UNDP, Undated).

Botswana developed a Climate Change Policy in 2018, which was adopted by the Parliament in 2021, as well as a national climate change action plan and strategy (NCCSAP) to operationalize the Policy (Parliament of Botswana, 2022). The NCCSAP points to priority strategies that are then unpacked into four sequential target actions – one each for the years 2020, 2023, 2026, and 2030. One of these priority strategies is the development of renewable energy and promotion of energy efficiency. The NCCSAP commits the Government to adopt and fully implement the Botswana Renewable Energy Strategy finalized in 2017 and the Net Metering guidelines (being finalized in 2018), to incentivize growth in domestic and commercial solar power generation and usage. It also posits the introduction of ecosystem-based adaptation (EBA) as a core criterion and consideration into Botswana's land use planning legislation and land use master planning guidelines. Finally, it aims to implement and enforce climate change mitigation as a core criterion and consideration into Botswana's land use planning legislation and land use master planning guidelines, to realise the goals of Botswana's National Spatial Plan 2036, which emphasizes the need for spatially targeting climate resilience in key sectors. Together with the World Bank, Botswana has secured funding to support the design and implementation of a carbon tax. However, no specific implementation timeline has been established yet (IMF, 2022).

The NCCSAP framework also calls for the development of a long-term low carbon strategy, a National Adaptation Plan (NAP), Nationally Appropriate Mitigation Actions, identification of technologies, plan for knowledge management capacity development, education and public awareness and a financial mechanism (Parliament of Botswana, 2022). Although Botswana does not yet have a NAP, the government is implementing adaptation projects related to water, ecosystems and climate-smart agriculture projects and early warning systems (UNFCCC, 2022). Botswana has issued three national communications to the UNFCCC till date: NC1 in October 2001, NC2 in January 2013 and NC3 in November 2019. In 2019, the country also published its first biennial update report.

The Ministry of Environment, Natural Resources Conservation, and Tourism (MENT) has set up a climate change coordinating unit to help manage several national and international initiatives on climate change. The Department of Meteorological Services (DMS) was designated as the focal point for climate change response in the country and to help meet obligations under the UNFCCC. Botswana has also set up of a National Committee on Climate Change (NCCC) that is intended to be an advisory body to assist the DMS in implementing climate change related processes, particularly at a technical level.

1.2. Biodiversity and wildlife

Botswana has a distinct geography, which is dominated by the Kalahari Desert that covers nearly two-thirds of the country's land surface, the Okavango Delta that is located in the northwest of the country and is the world's largest inland delta, the Makgadikgadi Pans that are a large salt pan in the North-central parts of the country, and the Zambezi River. These varied ecosystems make Botswana a complex stronghold of biodiversity and diverse wildlife.

Botswana has some 900 known species of amphibians, birds, mammals and reptiles (CBD, undated), and is home to one of the largest remaining populations of African wild dog and African elephants on the planet (African Wildlife Foundation, undated). Biodiversity is particularly high in and around the Okavango Delta with a species richness index between 9.3 and 15 (CBD, undated). The estimated number of plant species stands at between 2,150 and 3,000, of which 15 are endemic and 43 on the IUCN Red List. Additionally, there are 150 identified species of mammals, of which three are endemic and 112 are red-listed, 570 species of birds with 1 near endemic species and 15 red-listed, 131 species of reptile with 2 red-listed, 34 species of amphibian and 99 species of freshwater fish (CBD, undated).

As part of Southern Africa region, Botswana possesses an established network of protected areas that contribute both to conservation targets and to nature-based tourism (Urich et al, 2021). The travel and tourism sector contributes 11.5% to the country's GDP and 26,000 jobs (African Nature Based Tourism Platform, 2021). The tourism industry is largely centred around protected and conserved areas, wildlife, and wilderness tourism. Over 40% of the country's land surface area is designated as protected areas (UNDP, 2018). These include forest reserves, game reserves, national monuments, and Wildlife Management Areas. Botswana has also developed a National Ecotourism Strategy (NES) to complement the country's Tourism Master Plan. The NES seeks to create an environment in which all elements of tourism development planning and management facilitate, promote and reward adherence to the key principles of ecotourism. High potential areas for tourism development have been inventoried, and the strategy putting in place the necessary measures enables any development to be planned and managed in accordance with the principles of ecotourism.

The primary threat to biodiversity in Botswana is habitat loss, habitat degradation and barriers to species movement, although the scale of these threats is dependent on location and a range of localised factors. These factors include overgrazing through unregulated cattle grazing, range degradation, fires, wind erosion, extractive resource use, increased water extraction for irrigation resulting in increased salinity, uncontrolled tourism, poaching, and disruption of migration routes through fencing (Eastern and Southern Africa Resource Hub, undated and CBD, undated).

Climate change is also likely to affect wildlife resources in Botswana through different stressors depending on the status and management of these resources. An integrated hydrological model, developed to assess the Okavango Delta hydrological response to various natural and anthropogenic scenarios, projected that climate change will potentially have the greatest impact on the Kalahari basin and the delta (CBD, undated). Botswana's NCCSAP notes that the Government will identify and include stronger climate change science and considerations into the next revision or update of the National Forest Policy, the National Forestry Action Plan, the Botswana Biodiversity Strategy and Action Plan, and the Forest Conservation Strategy.

Botswana ratified the Convention on Biological Diversity (CBD) in 1995 and the Cartagena Protocol in 2003. Botswana also acceded to the Nagoya Protocol in 2013. In the CBD's Sixth National Report, Botswana reported that it was in the process of domesticating the Nagoya Protocol. With funding from GEF and support from UNDP, the country had

undertaken legal and institutional review which recommended a stand-alone legislation on the implementation of the Nagoya Protocol. According to the Sixth National Report, the national legislative drafting processes had commenced and was at the Draft Cabinet Memorandum stage.

Botswana has also developed legislations and policies towards biodiversity conservation and implementation of the CBD. These include the National Biodiversity Strategy and Action Plan of 2004 which is reviewed periodically and the current one dates to 2016, the Game Ranching Policy, Wildlife Policy, the Wildlife Conservation and National Parks Act of 1992 and the National Wetlands Policy that is at a draft stage (UNDP, 2018). Additionally, there are frameworks such as the Elephant Management Plan and the Ostrich Management Plan (UNDP, 2018).

1.3.Natural resources

Botswana has abundant natural resources, such as diamonds, bronze, nickel, and coal. Mining of diamonds and other natural resources, in fact, plays an important role in Botswana's economy. According to the Botswana Minerals Policy 2022, Botswana is committed to putting measures in place to exploit the country's coal resources through exploring clean coal technologies and technology transfer in the subsector in order to derive maximum benefit for economic diversification in an environmentally sustainable manner (Chambers and Partners, 2022). The Government's objective is to achieve optimal and sustainable utilisation of the country's coal resources to drive economic growth by increasing the contribution of clean coal to Botswana's energy mix and establishing Botswana as a sustainable coal beneficiation hub in the Southern African region (Chambers and Partners, 2023).

Botswana has an estimated 212 billion tonnes of coal resources. To tap into these resources, MCM has recently commissioned a new opencast mine that involves the expansion of operations from only underground mining to also opencast. The state-owned Morupule Coal Mine (MCM) intends to increase coal production from the current 2.8 million produced by the mine to 4.2 million tonnes per annum (Chambers and Partners, 2023). The development of new coal mines has been attributed to the growing demand for coal from European countries, who are understood to be sourcing coal from Southern Africa since the start of Russia's military offensive against Ukraine in 2023, despite a global transition away from coal (Mining Technology, 2022 and Mining Weekly, 2023). In the event that Botswana does develop coal mines, the mining industry will have to consider its environmental impact, including the sector's contribution to carbon emissions.

Approximately 50% of Botswana's forests are affected by land degradation. There are multiple drivers including unsustainable grazing, cultivation, fuel-wood and NTFPs harvest, and uncontrolled fires. From 2001 to 2022, Botswana lost 510 ha of tree cover, equivalent to a 2.5% decrease in tree cover since 2000 (Global Forest Watch, Undated). According to the FAO, in 2020 a National Forest Policy was waiting to go parliament for consideration (FAO, 2020). The implementation of policy is to be supported by the National Forestry Action Plan and a review of the Forest Act reviews is not known.

1.4.Air quality

Although not highly industrialised or highly populated, air quality is a growing problem in Botswana. Sources of air pollution include growing industrial and manufacturing operations particularly mining and smelting activities, stone and sand crushing operations that involve crushing stones into different particle sizes from concrete to fine sand, vehicular emissions, waste and household fires (Wiston, 2017 and Akinola et al, 2017). Household burning of wood and biomass, which remains one of the major energy sources for cooking and

heating, is a major source of indoor air pollution. In addition to these sources, a vast amount of mineral dust is also generated from the Kalahari desert (Wiston, 2017).

Inadequate data to monitor and appraise pollution levels, lack of cohesive air quality policies, and weak or no legal restrictions pose challenges to air pollution management. There has been very little development in air quality legislation in Botswana (Akinola et al, 2017). Air pollution management is governed largely through the Atmospheric Pollution Prevention Act of 1971 that focuses on preventing the pollution of the atmosphere through emissions from industrial processes. The Environmental Assessment Act of 2010 provides for environment impact assessment to be used as a tool to assess the potential effects of planned developmental activities and for monitoring and evaluation of the environmental impacts of developmental activities. However, air pollution is not adequately considered in the planning and placement of pollution sources and residential sites. Moreover, there is a lack of mitigation measures and/or non-operational emission controls (Wiston, 2017).

The main governmental body responsible for air quality is the Department of Waste Management and Pollution Control. This Department formulates and provides policy direction and leadership, while the implementation of the policies is done by the local authorities. One of the main instruments for air pollution regulation, however, comes from the Botswana Bureau of Standards, which published Ambient Air Quality – Limits for Common Pollutants in 2012 (Akinola et al, 2017). This Standard specifies limits for common air pollutants to ensure that the negative effects of such pollutants on human health and the environment are prevented or reduced. The limits compare favourably with those in South Africa, except for PM10 one year limit value which is 100 % higher the South African value (Akinola et al, 2017). However, the prevailing levels of air pollutants like sulphur dioxide and fine particulate matters in the country's atmospheric environment suggests that the Standard might not have yielded expected results (Akinola et al, 2017).

Botswana acceded to the Montreal protocol in 1991 and to the Montreal Amendment in 2013. Data reported to the UNEP Ozone Center shows that Botswana made impressive progress in the phase-out of HCFCs between 2016 and 2021 during which the total consumption of which has reduced by 87% (UNEP, undated). It however more than doubled between 2021 and 2022 when it stood at 2.74 ODP tonnes. HFC consumption decreased by 80% between 2019 and 2022 (UNEP, undated). Botswana accepted the Kigali amendment in 2020. Botswana established a HFC Licensing System in February 2023.

1.5. Water

Botswana is amongst the top 20 water stressed countries in the world, when measured by measures the ratio of total annual water withdrawals to total available annual renewable supply, accounting for upstream consumptive use (Hofste et al 2019). Despite facing water scarcity, 93% of the population has access to water (UN Water, Undated). But access varies between urban and rural areas. For example, 73% of the urban population has access to safely managed service in 2022 while 80% of the rural population had access to at least basic service (UN Water, Undated).

Sustained access to water supply service is however not assured as many communities are served by systems that have been affected by the chronic droughts of the past decade, that have affected many countries in southern Africa. Water stress is projected to increase manifold by 2040 when the country is expected to face extremely high levels of water stress by and is projected to see water withdrawal at more than 80% of the available water supply (Maddocks et al, 2015). In the last few years, the country has instituted water rationing even for most large settlements. In addition, many households have installed storage tanks, pumps and are purchasing water from private water vendors. Water pollution is also a growing problem that affects both surface water and groundwater.

Botswana has nine dams from which surface water is sourced, namely Gaborone, Nnywane, Bokaa, Letsibogo, Shashe, Ntimbale, Thune, Lotsane and Dikgathong dams. Additionally, Botswana imports water from the Molatedi dam in South Africa. In 2015-16, the agriculture sector accounted for 48% of Botswana's total water consumption (Republic of Botswana, 2017). The next largest water users were households with 23%, mining with 16%, Other Industries with 7% and government with 6%. Non-revenue water increased from 29% in 2016-17 to 40% in 2017-18 but then decline to 26% in 2018-19 (Statistics Botswana, 2020 and 2021). No data was found on the wastewater treatment.

Water resource management and water supply services are governed under the Ministry of Minerals, Energy and Water Resources, which divided management between the Department of Water Affairs and the Water Utilities Corporation. The 1991 National Water Master Plan (NWMP) and its 2006 Review (NWMPR) along with the 2013 Integrated Water Resources Management & Water Efficiency Plan (IWRM-WE Plan) comprise the country's water strategies. The government has implemented water sector reforms to improve sectoral governance and ensure sustainable supply and utilisation but progress is understood to be slow and limited (Setlhogile and Harvey, 2015). This has, in turn, delayed the shift towards demand management, which is crucial, as the Water Utilities Corporation is struggling to maintain supply to all settlements and the country regularly experiences severe water supply shortages (Setlhogile and Harvey, 2015). Botswana is also understood to have developed a water policy, but the status of the policy is not known.

1.6. Waste and chemicals

Statistics on waste generation in Botswana are limited and outdated. Statistics available from Statistics Botswana (2020) indicate Botswana disposes of almost all of solid its waste in sanitary landfills. 224,321 tonnes of solid waste were collected and disposed of at various landfills in the country in 2017. Of this, a small share of 1,516 tonnes was salvaged for reuse. By way of composition, little over 50% of this waste was of the nature of general waste. i.e., a mix of various types of waste due to lack of segregation at source (Statistics Botswana, 2020). 22% of the waste was from commercial sources and 17.6% was construction and demolition waste i.e., building rubble (Statistics Botswana, 2020).

Waste management practices in Botswana are affected by several factors. These factors include the lack of consistent and comprehensive solid waste management policies, poor implementation where policies exist, weak institutional framework for waste management, lack of clear guidelines on the responsibilities of the generators and public authorities, and absence of an integrated sustainable municipal solid waste management system (Mmereki, 2018).

On the legislative and policy front, the Waste Management Act and the Waste Management Strategy date back to 1998. The Government approved the Integrated Waste Management Policy in 2021 with the objective of deriving value out of waste through its value chain (UNDP, 2021) but little is known about the status of implementation. Solid Waste Management (SWM) is the responsibility of the Department of Waste Management and Pollution Control, under the Ministry of Environment, Natural Resource Conservation and Tourism. The Ministry is responsible for formulating policies and legislation, and for monitoring the waste sector to prevent and control pollution. Botswana has enacted waste management legislation and has developed waste management policies and strategies. There is an established system for collection of SWM data, but the system covers only a few cities (UN Habitat, 2022).

Botswana ratified the Basel Convention on the Control of Transboundary Movements of Hazardous Wastes and Their Disposal in 1998 and the Ban Amendment to the Basel Convention in 2004. The last submitted national report for the Basel Convention was in 2006 (Basel Convention, Undated) and is therefore far behind in national reporting. The latest national reporting cycle was for 2021. The country also lacks a national definition of

waste. As such the definition of hazardous waste is not included in its national waste regulation.

Botswana acceded to the Stockholm Convention on Persistent Organic Pollutants in 2002 but is yet to submit a national report under the Convention, thereby missing five reporting cycles. Botswana has however developed its National Implementation Plan (NIP) to the Stockholm convention in 2008. Botswana also ratified the Rotterdam Convention in 2008. Botswana has not ratified/acceded to the Bamako Convention on the Ban on the Import into Africa and the Control of Transboundary Movement and Management of Hazardous Wastes within Africa all focusing on hazardous waste.

1.7. Environmental baselines summary

Table 2: Drivers, pressures, impacts and responses across environmental impact areas

Environmental impact area	Drivers	Pressures	State	Impacts	Responses
Climate change	Global emissions, domestic energy production	Increased GHG emissions, deforestation	Low carbon footprint, water stress	Greater frequency and intensity of flooding, water scarcity, droughts	Paris Agreement, NDC, Climate Change Policy and Institutional Framework
Biodiversity & Wildlife	Habitat loss and degradation, poaching, disruption of migration routes, poaching	Overgrazing, water and resource extraction, tourism, climate change	Species rich	Loss of ecosystems, biodiversity loss, increase in number of endemic species, Impact on tourism revenues and jobs	Convention on Biological Diversity, Nagoya Protocol national legislations and policies including management plans for specific species
Natural resources	Mining, Land degradation	Overgrazing, fuel wood, land cultivation	Loss of tree cover	Deforestation, environmental consequences of coal mining in future	
Air Quality	Industrial and manufacturing operations, vehicular emissions, waste and household fires	Industrial growth, increase in vehicle use, poor urban planning, energy demand	Poor air quality	Negative effects on human health	Air quality standards
Water	High levels of withdrawal, climate change driven droughts	Climate variability, recurrent & frequent droughts, water pollution	High levels of water stress	Water scarcity	Water sector reforms
Waste & Chemicals	Domestic and commercial waste	Waste generation, inadequate disposal, weak governance	Landfilling of waste	Land and water pollution, emission of toxic gases	waste management legislation and policies, better data collection

2. IMPACT SCREENING AND SCOPING

The impact screening shows that focus of addressing environmental challenges lies in increasing GHG emissions, environmental impacts of coal mining and loss of biodiversity that will impact the tourism sector. GHG emissions are increasing on account of fossil fuels based energy production to meet the growing domestic demand. Botswana is also understood to be developing new coal mines in response to the demand for coal from European countries.

Though there are no guidelines and regulations dealing specifically with ESG in the mining sector, the country's commitment to sustainable development through the NDP and policies

such as the Botswana Minerals Policy, 2022 have created a framework which encourages the implementation of ESG operating frameworks. Further, the various pieces of legislation dealing with the mining sector (the EA Act, the Mines Act, the Waste Management Act, and the Mines, Quarries, Works and Machinery Act) place obligations which mandate persons engaged in the extractive sector to implement ESG initiatives.

Botswana is however also taking measures to diversity electricity generation away from coal. The Government has set targets for sourcing 15% of the country's energy from renewables by 2030, 36% by 2036, and 50% by 2040 (AFDB, 2021). In 2020, the Government promulgated a 20-year Integrated Resource Plan (IRP) for electricity generation, covering renewable energy technologies such as solar photovoltaic, wind, concentrated solar thermal, and batteries for energy storage. In line with the IRP, the Government of Botswana has approved and intends to implement energy projects with a total installed capacity of 1 540 MW by the year 2040 to meet the growing energy demand at least cost whilst also reducing the country's carbon footprint. This addition is expected to come from new coal (300 MW) coal bed methane (250 MW), and solar, wind and battery storage (90 MW).

Additionally, the Government amended the Electricity Supply Act in 2007 to enable the participation of private sector IPPs in the electricity market and established an independent Regulatory Authority in 2016 (AFDB, 2021). The Government is also revising the National Energy Policy (AFDB, 2021). The adoption of a National Energy Efficiency Strategy is also underway (IRENA, 2021). Additionally, the Government has launched the solar PV IPPs tender programme for both off-grid and grid connected system. In addition, the Ministry of Mineral Resources, Green Technology and Energy Security launched a net-metering scheme for rooftop PV systems in late 2020.

Progress with the solar PV IPPs tender programme has been slow. The tender for 100 MW of solar PV capacity announced in 2017 was cancelled in May 2019. It was reissued and redefined in late-2019 as two 50MW IPP projects. Procurement was initiated on 12 grid-connected, solar- and diesel-powered mini-grids with a total capacity of up to 35MW. In 2021, two projects totalling 4MW were successfully tendered. The tender is being reissued to complete the 10 remaining projects. Revised tender regulations were expected to come in force in 2022 to assist uptake (Bloomberg NEF, undated).

Amongst measures to protect biodiversity, Botswana established a National Environmental Fund (NEF) in 2010 to support civil society action in biodiversity management. The NEF derives its funding from taxes, levies imposed on plastic carrier bags, and revenue collected into a special environment fund. As of December 2022, the country had supported 47 civil society-led projects with grants from the NEF to pursue biodiversity management projects, to the tune of approximately CAD 3.9 million (IISD, 2022).

The results of the CGE modelling undertaken by DG Trade suggest that changes in trade due to the EPA have had negligible scale effects in total CO₂ emissions, with an increase of 0.00009% in Scenario A and of 0.00013% in Scenario B. Some structural impacts are visible, with the most significant reductions in CO₂ emissions in wearing (-2.38% in scenario A and -2.30% in Scenario B), textiles (-1.84% and -3.23%), motor vehicles and parts (-1.54% and -2.90%) and the most significant increase in CO₂ emissions in other manufacturing (2.28% and 2.18%). In scenario B additional significant CO₂ emission reductions are shown in wheat (-5.61%), rubber and plastics products (-2.0%), computer, electronic, optical products (-3.0%). The numbers should, however, be treated with care, given a relatively high uncertainty in emission data and the small absolute numbers.

3. ANALYSIS OF ENVIRONMENTAL IMPACTS THROUGH THE AGREEMENT

The analysis of bilateral trade and trade growth rates in chapter 5 of the main report shows that EU-Botswana trade has shown an upward trend in both directions since 2011. Botswana's export to EU have increased from €150 million in 2011 to €1.4 billion in 2022. The analysis also notes that bilateral trade between the EU and Botswana is dominated by diamond trade, which is not much affected by the EPA as it benefits from zero MFN duties. Data availability on electricity consumption by sectors is poor.⁶⁷ It is possible that there has been an increase in electricity consumption by the diamond mining sector. However, since the diamond trade is not affected by the EPA, it can be concluded that the scale effect of increased emissions cannot be attributed to the EPA.

The analysis of bilateral trade and trade growth rates also shows that Botswana's, post-EPA non-diamond exports to EU have been almost 60% lower than exports prior to the Agreement. However, emissions have not declined during this period. This suggests that there is no structural effect either.

In the period following the entry into force of the EU-SADC EPA, several policy developments can be noted in Botswana since then to diversify electricity production to reduce GHG emissions and adapt to climate change. This is especially observed in IRP 2020 and the solar PV IPPs tender program for both off-grid and grid connected system. There is however no evidence that these developments are linked to the EPA. Botswana's development of new coal mines is however being attributed to the demand for coal from EU since 2022. If this is the case and if new coal mines are developed, there would be an increase in environmental challenges posed by coal mining. No specific examples or evidence of this has been found so far, however the wider environmental impacts of coal mining are well known. To that extent, Botswana will not be immune to these impacts.

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Appendix D3: Country Report Eswatini

1. ENVIRONMENTAL BASELINES

Environmental activities in Eswatini are governed under the Environment Management Act that was adopted in 2002. The Ministry of Tourism and Environmental Affairs is the lead governing body, and the main implementing body is the Environment Authority.

1.1. Climate change

The Kingdom of Eswatini is the smallest country on the African continent, landlocked with borders with South Africa and Mozambique. The country has a subtropical climate with wet hot summers and cold dry winters. Most of the country is savanna-woodlands, but it also has montane grasslands, forests and aquatic systems. Over 50% of the country is drylands, which are particularly vulnerable to the effects of climate change. Out of 185 countries, the ND-GAIN Index ranked in 2021 Eswatini as the 57th most vulnerable country to climate change and the 145th most ready country to improve resilience (University of Notre Dame, 2021). The most prevalent natural hazard in Eswatini is drought (UNDRR, 2022). In the last years, droughts have intensified in terms of frequency, severity and geospatial coverage. This led to major losses in the agriculture, wildlife, and forestry sectors and affected human health in all the country's regions. In 2020 the government adopted the National Drought Plan for Eswatini which aims to increase drought resilience of the country's economic sectors, ecosystems and communities through improved mitigation of the adverse effects of drought. The main drivers to this drought are the country's poor economy and the subsistence nature of agriculture, whereby most of the farming is done on small scale basis and is often only sufficient to feed the farmer's immediate household (Ministry of Agriculture, 2020).

Eswatini has a relatively low carbon footprint. The Edgar database shows that per capita GHG emissions in 2022 were 2.28 t CO₂eq/yr, which is around 34% of the global average in that year. By comparison per capita emissions in the EU27 was 8.15 tCO₂eq in 2021 (Crippa et al, 2023). The 2010 GHG inventory is the most recent one submitted to the UNFCCC and was also used as the baseline for target setting in the NDC. In 2010 the country was a net sink of GHG emissions, with total emissions at 4 861 Gg CO₂e and land use and forestry sectors sequestering a total of 5 863 Gg CO₂e, resulting in a net sink status of -1 002 Gg CO₂e (The Kingdom of Swaziland, 2016). 35% of the GHG emissions came from the industrial processes sector, which were mainly HFCs emissions from products used as substitutes for ozone depleting substances in the refrigeration industry. 33% of total GHG emissions came from agricultural activities and 31% from energy and transport.

The Government of Eswatini ratified the UN Framework Convention on Climate Change on 7 October 1996 and the Paris Agreement on 21st September 2016. The first INDC was submitted in 2015 and updated in October 2021 (Kingdom of Eswatini, 2021). Eswatini is not fully in line with reporting obligations. The last National Communications submitted (NC3) was published 6 October 2016, while the reporting obligation is every 4 years. Eswatini has also not yet submitted a biennial update report, which is required to provide information on mitigation actions taken and their effects, as well as an updated national GHG inventory. Classified as a lower-middle income country Eswatini was required to submit a first BUR by December 2014 and further reports every two years thereafter. The government has not yet adopted a Climate Change law. Responsibilities for climate change are governed under the 2002 Environment Management Act.

In the revised NDC of October 2021 the country adopted a GHG reduction target of 5% by 2030, compared to its baseline scenario, or 14% with financial support. The NDC provides measures for mitigation and adaptation across sectors, the most significant measures

being a targeted increase in the share of electricity from renewable sources from 16% in 2010 to 50% in 2030, and the plan to plant 10 million trees by 2030. Whether the target is sufficiently ambitious is hard to judge, given that a more recent inventory has not been submitted and data published by recognised institutes seem conflicting. For example, while the Edgar database shows that total GHG emissions in the period 2010-2020 increased with 9% (Grippa M et al, 2023), an inventory provided by the University of Eswatini reports that total emissions in 2020 were less than 34% of the level in 2010 (1 635 Gg CO₂e. At the same time the World Bank reports that total GHG emissions in 2020 were 15.6% higher than in 2010.

The UNFCCC does not report submission of a National Adaptation Plan (NAP), but two important documents on adaptation were recently published. The Initial Adaptation Communication, published in 2021, summarises the risks in each of the five priority sectors, and provides for each of the sectors an overview of the climate adaptation targets and actions (Government of Eswatini, 2021). In 2023 this was followed by the Eswatini implementation plan for the adaptation and mitigation strategies identified in the updated NDC, launched on 3 May 2023 (UNDP, 2023). The plan, developed under the NDC partnership, is a collection of a long list of adaptation and mitigation measures to implement the NDC between now and 2030, with a total price indication of USD1.3 Billion (Kingdom of Eswatini, 2023). The plan covers twelve national priority areas, including agriculture, health, water, ecosystems and biodiversity, infrastructure, energy, waste, industry, forestry, gender, youth and disaster risk reduction. The measures listed are quite specific, such as the capacity of new hydro-power or bio-energy capacity or reduction of energy consumption in water heating through replacing conventional geysers with 1 000 solar water heaters. Funding for the measures is sought from international donors.

1.2. Biodiversity and wildlife

Eswatini has four ecosystems: Montane grasslands, Savanna-woodland mosaic, Forests and Aquatic systems. For a small country, Eswatini has a rich floral and faunal diversity. The Montane grassland is home to 72% of Swaziland's endemic flora. It provides valuable ecosystem services such as food, medicinal plants, grazing lands, and is the watershed for most rivers arising within the country. However, it is very prone to erosion and faces numerous other anthropogenic threats such as agricultural expansion, alien invasive plant species and unsustainable grazing and resource harvesting. The Savanna-woodland is home to about half of the country's flora species complement and more than half of the fauna. This ecosystem provides food, grazing, medicinal plants, timber and fuel. It is threatened by agriculture, unsustainable grazing and resource use, alien invasive plant species as well as bush encroachment. The Montane grassland and the Savanna woodland originally covered respectively 46% and 48% of the country but due to the threats indicated have significantly reduced. The Sixth Report to the CBD (see details below) reports that 89 species of vertebrates and 305 species of plants to be listed in national Red Data Lists (Ministry of Tourism and Environmental Affairs, undated). The latest version of the IUCN red list of threatened species includes 47 species.

Eswatini ratified the Convention on Biological Diversity (CBD) in 1995 and the Cartagena Protocol in 2006. They also acceded to the Nagoya Protocol in 2016. Eswatini is in line with the CBD reporting obligations, having submitted the CBD's Sixth National Report (undated, likely in 2019) and the second National Biodiversity Strategy and Action Plan (in 2017). Eswatini joined the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) in 1997. It has submitted all required annual national reports, the last one for 2022 in June 2023, but its national legislation remains ranked as Category 3, meaning it does not meet the requirements for the Convention's implementation. Eswatini also ratified the Ramsar Convention on Wetlands and the Conservation of Migratory Species of Wild Animals, which came into force in 2013. Eswatini has 3 Ramsar sites with a total area of all 1,183 hectares.

In the Sixth National report to the CBD Eswatini reports that Eswatini's biodiversity has been markedly and categorically been threatened by anthropogenic and climate change incidents. The main pressures on Eswatini's biodiversity include conversion of natural habitats to other land uses, invasion of habitats by alien species, rapid expansion of settlements and urbanization, wild fires, climate change, overgrazing and the unsustainable use of natural resources. A total of 4,280 km² of the country's terrestrial ecosystem (approx. 25% of the land) has been lost to some form of other land use such as industrial timber plantations, sugarcane plantations and urban areas. A small percentage (about 1%) of the country's aquatic habitats is under legal protection. The aquatic and forest ecosystems have the highest number of species per unit area; however, the aquatic ecosystem is the least studied in the country while it is particular under threat mainly from pollution, habitat alteration and unsustainable harvesting of resources. A particular threat is that wetlands are drained for development (agriculture, roads and settlements) or are negatively affected by changes within their catchment. The report clearly identifies the underlying drivers of these pressures to be the rapid growing population with unsustainable patterns of consumption. Eswatini is home to around 3284 species of which 89 species of vertebrates and 305 species of plants are listed in national Red Data Lists (Swaziland Environment Authority, undated).

Progress to achieving biodiversity targets set in the NBSDAP2 is deemed to be lacking behind for 16 targets and satisfactory for three targets. The latter includes the targets to increase awareness on biodiversity, biodiversity mainstreaming and increasing the protected areas. Main reasons for lacking behind are under reporting due to poor coordination of biodiversity management efforts, poor enforcement of legislation and limited institutional capacities (Swaziland Environment Authority, undated).

1.3.Natural resources

Eswatini has diverse mineral resources, including diamonds, gold, kaolin, silica sand, arsenic, manganese, copper, nickel and tin. However, most of these deposits are small and not mined. The only active mine in the country is the Maloma Mine, which extracts coal.

The Ministry of Tourism and Environmental Affairs has a department of forestry that has the lead responsibility for the policy and legal framework on forestry, forest maintenance, including maintaining the national forest inventory and issuing permits for accessing, harvesting, processing and movement of forest. Promotion of sustainable use, management and development of forest resources is one of their specific tasks.

FAO's global forestry assessment reports a consistent increase in the forest area as percentage of the land area from 2000 to 2020, with the percentage increasing from 27.52 in the year 2000, to 28.65 in 2016 and 28.93 in 2020 (FAO, 2020). The same report mentions that the proportion of forest area located within legally established protected areas has increased from zero in the years 2000/2010, to 3.26% in 2016 and 4.68% (738 km²) in 2020. Of the 14 protected areas 3 qualify under IUCN's Protected Areas Management Evaluation (PAME) framework (UNEP-WCMC, 2023). Global Forest Watch reports that from 2000 to 2020, Eswatini experienced a net loss in tree cover, being -21.5 kha (-3.0%). More specifically, the gross loss in the period 2016 to 2022 was 25.0 kha of tree cover, equivalent to a 5.3% decrease in tree cover since 2000, and 11.6 Mt of CO₂e emissions (Global Forest Watch, 2023).

1.4.Air quality

As in all African countries, air pollution is an issue in Eswatini. Although the country shows relatively stable levels of PM_{2.5} emissions over the last decade, the average annual concentration in 2019 was still 23.4 µg/m³, which meets the least stringent interim target of 35 µg/m³ of the World Health Organization (WHO) Air Quality Guideline, but is still more than 4 times the regular targeted PM_{2.5} level of 5 µg/m³ (OECD data, 2023). A mixed set

of activities contribute to air pollution in Eswatini, including waste burning, coal mining, sugar processing, and various manufacturing industries. Household burning of waste, wood and biomass are also main contributors, the latter also for ambient air pollution.

Eswatini ratified the Vienna Convention and the Montreal Protocol on the reduction and consumption of ozone-depleting substances (ODS) in 1992 and the Kigali Amendment to the Montreal Protocol on the reduction of the consumption and production of hydrofluorocarbons (HFCs) in November 2020. Eswatini is compliant with the reporting requirements. Data reported to the UNEP Ozone Center for the year 2022 shows that HCFC net consumption – and as this is the only consumption of ODS in the country therewith in net total ODS consumption – from 1.17 tonnes in 2016 to 0.59 tonnes in 2022. Emissions decreased from 2016 to 2019, but thereafter increased again. Eswatini will need to step up reduction efforts to meet the formal deadline to phase out consumption by 2030. The same data reports, show that net HFC consumption has a steep increased from 2020 to 2021, but decreased again in 2022 to 69 106 CO₂eq tonnes in 2022. A licensing system is in place for both ODS and HFC, the latter is reported to be established in April 2022 (UNEP, 2023). Air pollution in Eswatini is governed by the Air Pollution Regulations 2010.

1.5. Water

In 2019 the WASH joint monitoring programme report found that only 69% of Eswatini's population have access to basic water services and only 58% have access to sanitary services. FAO reports that the level of water stress has been consistent over time, with a share of 2.57% of freshwater withdrawal as a proportion of available freshwater resources in both 2009 and 2020 (FAO, 2022), Unicef reports that in the percentage of population with access to clean drinking water has increased from 67% in 2015 to 71% in 2022 (Unicef, 2023).

The main policies identified in the updated NDC are to convert flood irrigation systems to water efficient systems and adopt water saving practices to increase water availability, equity and security. Other policies identified include diversifying to drought tolerant commercial crops, trees, and small livestock, improve water governance and develop water pricing structures to encourage efficient water use.

Water resource management and related activities are governed by the department of water affairs of the Ministry of natural resources and energy. The National Water Authority is the body that supervises all activities and advises the Minister on policy matters. The main governing regulations, which have not been updated since the start of the EPA, are the National Water Act from 2003, the Integrated Water Resources Management Plan from 2011 and the National Climate Change Policy of 2016. In August 2018 Eswatini published its water policy, which provides a framework for water management in Eswatini. One of the main aims of the plan was to help implement the target of 100% access to water as defined in the National Development Strategy (Vision 2022), in line with SDG indicator 6.1. The water policy furthermore provides the rules and regulations for the promotion of sustainable water harvesting and sustainable development of water resources, and defines water pricing regulations. The policy was formulated with financial support from UNDP and is in line with the 2006 SADC Regional Water Policy and Strategy Eswatini government (2018).

The Water Policy from 2018 mentions that Eswatini does not have adequate guidelines and standards for water quality but a draft government document issued for consultation in May 2021 has formulated such standards (DBSA, 2021). In a speech delivered in March 2023 at the UN Water Conference the managing director of the Eswatini water services corporation mentions that although the country is making significant strides, it remains off track to delivering the SDG goals on water, with 70.8% of the population using at least basic drinking water services, 64.3% people using at least basic sanitation services, 77.6%

Freshwater withdrawal of available freshwater resources, and only 5.3% anthropogenic wastewater that receives treatment (EWSC, 2023).

1.6. Waste and chemicals

EEA reports that in Eswatini the total annual waste per person per day in 2022 was 0.65 tonnes, which is a significant increase from 2014 and 2016 when it was reported to be respectively 0.2 tonnes and 0.45 tonnes (EEA, 2023). Increase in population and growing urbanisation is said to be prominent factors to that increase. EEA reports that in 2019 41% of the waste was burnt, 27% recycled, and 25% disposed. No information is provided on the remaining share (7%).

Implementation of waste management in Eswatini is the responsibility of the Waste Management Unit in the Eswatini Environment Authority. The leading governing policies on waste are the Environmental Management Act 2002 and the Waste Regulation 2000. Eswatini developed a National Solid Waste Management Strategy in the year 2000 and the Litter regulation from 2011 includes provisions to manage littering in urban and peri-urban areas (Richa Singh, 2021).

Research from 2021 identified various challenges to waste management in Eswatini. First, the average collection rate is around 46% only, and household waste is collected in the same trucks as commercial waste. Second, waste is directly transported to one of the six dumpsites, limiting options for proper waste management. Third, implementation of regulations is poor. There are no specific guidelines sustainable waste management nor standard operating procedures and protocol for enforcing implementation of regulation (UNEP, 2019).

Eswatini ratified the Basel Convention on the Control of Transboundary Movements of Hazardous Wastes and Their Disposal in 2005, the Stockholm Convention on Persistent Organic Pollutants (POPs) in 2006 and the Rotterdam Convention on Hazardous Chemicals and Pesticides in International Trade in 2012. Eswatini has not ratified the Ban Amendment to the Basel Convention prohibiting all transboundary movements of hazardous wastes which are destined for final disposal operations from OECD to non-OECD States. The country does have a definition of hazardous waste included in its national waste regulation. This regulation is from the year 2000 and has not been updated to include the provisions of the Basel Convention. Eswatini has not implemented provisions to restrict the export of hazardous wastes and other wastes. There is however a total ban on imports. The last available report to the Basel Convention is from 2019, which means that Eswatini is two years behind in its national reporting. A National Implementation Plan (NIP) to the Stockholm convention has been submitted in 2010 but has not been updated since. Also, no recent reports have been submitted on the implementation of the Stockholm convention; data reported is from 2006 and 2009 only.

1.7.Environmental baselines summary

Table 1: Drivers, pressures, impacts and responses across environmental impact areas

Environmental impact area	Drivers	Pressures	State	Impacts	Responses
Climate change	Poor adaptation ability: poor economy, small-scale farming	Higher temperatures, more frequent, more severe droughts in larger parts of the country.	Relatively low carbon footprint	Losses in agriculture, wildlife and forestry, affecting human health	Paris Agreement, Updated NDC with increased targets, adaptation Plan, stepping up implementation of climate policies.
Biodiversity & Wildlife	Rapid growing population and urbanisation, unsustainable patterns of consumption (grazing and resource harvesting), alien invasive plant species	Conversion of land, wild fires, climate change, overgrazing and unsustainable use of natural resources	Rich floral and faunal diversity, main source of food and fuel	Loss of ecosystems, biodiversity, draining of wetlands, threat to food security.	Ratification of convention on Biological Diversity and other MEAs
Natural resources	See biodiversity	See biodiversity	High forestry resources, rich in mineral resources (but small deposits and limited mining)	See biodiversity	Increase in natural protected areas
Air Quality	Human activities as waste burning, coal mining and industry processing.	High PM emissions	Stable levels of PM emissions but exceeding WHO standard	Negative effects on human health: high death rate and high costs	Ratification of Vienna Convention and Montreal Protocol
Water	Poor economic conditions	Local water shortage, droughts	Overall high water availability, low access to basic water services, low access to sanitary services	Food poverty, health issues	Formulation of water policy and water quality standards
Waste & Chemicals	Increase in population, growing urbanisation, high share waste burning	Low share waste collection, poor waste management, poor implementation of waste regulation	Linear economy, low recycling	Land and water pollution, emission of toxic gases	Implementation of MEAs (Basel, Stockholm, Rotterdam) but significantly behind in implementation of these MEAs and corresponding national policies.

2. IMPACT SCREENING AND SCOPING

The impact screening shows that focus of addressing environmental challenges lies in the areas of climate change and biodiversity, with impacts most noticeable in the agricultural sector.

The third national communications published in 2016 identified that 70% of the country's population relies on the agricultural sector for income, and that over 75% of smallholder farmers rely on rain-fed agriculture, which makes them vulnerable to climate change. The same report also identified that livestock and crops production under rain-fed conditions

have declined by over 30% on average in the last farming seasons reported on as a result of temperature increase and drought. In the 2021 updated NDC it was repeated that the country is vulnerable to climate change. The report indicates that the country is experiencing increase in annual average temperature, variation in precipitation, higher occurrence of hot days and cold nights, increase in frequency of extreme events like floods, droughts, and storms.

The 2021 initial adaptation communication adds impact numbers to these threats. It reports that 14% of the country's population of 180,000 people is potentially affected by drought and this number is projected to increase by 33% by 2050. The report indicates that an average of 15% of GDP (USD 0.5 billion) is potentially affected by droughts and this proportion is expected to rise to 41% of GDP by 2050. Research quoted in the adaptation communication indicates that from the 60% of the population that experiences medium to high vulnerability to climate-driven hazards it is mostly the rural poor that are threatened, especially households relying on subsistence farming to support their livelihoods.

The results of the CGE modelling undertaken by DG Trade suggest that changes in trade due to the EPA have had negligible scale effects in total CO₂ emissions, with an increase of 0.00008% in scenario A and 0.000022% in scenario B. Some structural impacts are visible, with the most significant reductions in CO₂ emissions in wearing (-6.22% and -2.35%) and motor vehicles and parts (-3.33% and -4.15%), and the most significant increase in CO₂ emissions in metal products (+0.71% and +3.19%). In scenario B additional significant CO₂ emission reductions are shown in other prepared food (-3.67%) and dairy products (-2.56%), while additional significant increase in CO₂ emissions is shown in computer, electronic, optical products (+2.99%), machinery and equipment (+2.74%) and electrical equipment (+2.27%). Chemicals show a CO₂ emission increase in scenario A (+0.66%) but a reduction (-0.22%) in scenario B. The numbers should, however, be treated with care, given a relatively high uncertainty in emission data and the small absolute numbers.

3. ANALYSIS OF ENVIRONMENTAL IMPACTS THROUGH THE AGREEMENT

The analysis of bilateral trade and trade growth rates in chapter 5 of the main report concluded that trade between the EU27 and Eswatini has declined from 2011 to 2022, mostly as a result of reduced exports by Eswatini, primarily from agriculture. The GHG emissions from agriculture in that period, however, have not decreased, but rather increased by 1%. Total GHG emissions in that period increased much stronger: by 22%. Hence, there does not seem to be a scale effect from the agreement. The value of both import and export of machinery and chemicals has increased in the last years, and so have GHG emissions from production sectors. This could imply structural effect. The variations, however, do not show a consistent pattern, hence also other factors are likely in play.

In the period following the entry into force of the EU-SADC EPA Eswatini has taken several steps to address climate change and biodiversity. In 2020 the government adopted the National Drought Plan for Eswatini, in 2021 they published the updated NDC and the initial adaptation communication, and in 2023 the implementation plan for the adaptation and mitigation strategies. There is however no evidence that environmental developments are linked to the EPA, but literature review rather suggests that this is a response from significant impacts from climate change experienced in the country, such as major losses in the agriculture, wildlife, and forestry sectors as a result of droughts, resulting in human health impacts and loss of biodiversity. The forenamed actions have resulted in developing a long list of adaptation and mitigation measures for which international donor support is sought.

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Appendix D4: Country Report Lesotho

1. ENVIRONMENTAL BASELINES

The main responsibility for environment in Lesotho lies with the Ministry of Energy and Meteorology (MEM), in practice operating through the Lesotho Meteorological Services (LMS). LMS is charged with the responsibility of monitoring and reporting on weather, climate and climate change issues. MEM ensures that the country adheres and implements commitments under the UNFCCC and the Paris Agreement, the Vienna Convention and Montreal Protocol on Substances that deplete the ozone layer. MEM furthermore provides support to other Multilateral Environmental Agreements. A National Climate Change Committee (NCCC) was formally established in 2013 to effectively coordinate climate change issues in the country. NCCC serves as an advisory body to MEM.

1.1. Climate change

Lesotho is a small, landlocked country surrounded by the Republic of South Africa. The country has a continental temperate climate. A total of 59% of the land area consists of mountainous area. Out of 185 countries, the ND-GAIN Index ranked in 2021 Lesotho as the 59th most vulnerable country to climate change and the 150th most ready country to improve resilience (University of Notre Dame, 2021). The government itself, however, defined Lesotho as one of the most vulnerable countries to climate change (LMS, 2021 and Kingdom of Lesotho, 2021). The main reason for this conclusion is that more than 80% of the population relies on natural resource-based industries such as agriculture, which exposes the economy of Lesotho to environmental shocks such as natural disasters and the negative impacts of Climate Change.

Lesotho has a relatively low carbon footprint. The Edgar database shows that per capita GHG emissions in 2022 were 1.27 t CO₂eq/yr, which is around 19% of the global average in that year. By comparison per capita emissions in the EU27 was 8.15 tCO₂eq in 2021 (Crippa et al, 2023). The Government of Lesotho ratified the Paris Agreement in January 2017. The INDC was submitted in September 2015, followed by the first NDC submitted in 2018 (LMS, 2017). Lesotho issued three national communications to date: NC1 in April 2000, NC2 in November 2013 and NC3 November 2021. In 2021 it also published its first biennial update report. The NDC includes an unconditional target of 10% and a conditional target of 35%. Data availability on the levels of emissions are scarce. The NC3 includes emissions in the period 2000-2010, indicating that if no climate change mitigation measures are implemented, the emissions in 2030 will be 10% higher compared to 2010.

The BUR1 (Kingdom of Lesotho, 2021) provides more updated information, indicating total net GHG emissions of 5 660.44 Gg CO₂e in 2017, with the energy, AFOLU, waste and IPPU sectors contributing 50.5%, 42.7%, 6.5% and 0.3% respectively. Residential energy consumption (fuel combustion) is the biggest contributor to the energy sector emissions followed by use of petrol and diesel by road transportation. The NDC mentions a projected increase of 17% of emissions from energy use. As Lesotho's central energy production already uses almost 100% clean national energy and is committed to keep doing so, the mitigation measures identified are somewhat different than in other countries. The top three mitigation measures identified in the NC3 are planting of indigenous trees, crop rotation and conservation agriculture and avoiding over-fertilization. However, to keep emissions low the NDC also identifies that key mitigation are to be taken in energy efficiency, energy demand management, and increased renewable energy production. Adaptation measures identified in the NDC include capacity building in sustainable forest management, reforestation and land rehabilitation.

The main regulatory basis for Lesotho's climate change activities are formed by the National Climate Change Policy 2017-2027, the five-year National Climate Change Policy

Implementation Strategy and the National Strategic Development Plan 2018/19-2022/23 (NSDP II), all formulated in 2017. The NSDP II identifies climate change as one of the key challenges hindering Lesotho's development. The most relevant regulations approved since 2017 are the strategic Plan for Agriculture and Rural Statistics for Lesotho 2019/20 – 2023/24 that among others includes plans for sustainable agriculture and the Country Strategic Opportunities Programme 2020 – 2025 that aims to contribute to transformation of rural Lesotho towards a more resilient and economically productive environment.

Lesotho has not submitted a National Adaptation Plan to the UNFCCC but the government in 2015 started the process to formulate such plan in 2015, and a completed plan was published online in September 2021 (Lesotho NAP Team, 2021). In its 2011 National Adaptation Programmes of Action (NAPA) Lesotho already identified that it is prone to a number of key environmental stresses mainly drought, land degradation, desertification and loss of biodiversity. The NAP provides more specific info, mentioning that 4.5 million tons of soil is lost through soil erosion per year, and that this, as well as recurrent droughts and rapid population growth lead to increasing pressure on natural resources impacting on biodiversity by changing and reducing habitat for wild species. Impacts for population include excessive water runoff that have led to flash flooding and sheet and gully erosion, which in turn led to loss of limited agricultural land and therewith food production (Lesotho NAP Team, 2021). FAO reports that soil erosion is also the direct driver of Lesotho's wetland degradation (FAO, 2022).

1.2. Biodiversity and wildlife

Ecologically, Lesotho is divided into four agroecological zones namely; lowlands (17% of total area), foothills (15%), mountains (59%), and the Senqu River Valley (SRV) (9%) (Lesotho NAP Team, 2021). A total of 21.3% (6.497 km²) of Lesotho's territory is protected area. Of the 6 protected areas 2 qualify under IUCN's Protected Areas Management Evaluation (PAME) framework (UNEP-WCMC, 2023). FAO reports that 14.48% of forest area is located within legally established protected areas and that this percentage has not changed in the last two decades. This could, however, also be a lack of more exact data. FAO also reports that the greatest threat to forest resources in Lesotho is from the browsing of the regrowth of harvested woody plants by the large population of freely-grazed domestic livestock. Where adopted, agroforestry has a certain potential to improve cropland and livestock productivity, besides the long-term benefits to the environment. Only from 2006 onwards forest management plans had been drawn up, and from 2008 sustainable forest management. Efforts are high to afforest /re-afforest on private ownership lands, however survival rates are often fairly low, due to deforestation (FAO, 2020).

Lesotho has very high levels of plant endemism with at least 54 endemic species. It is also home to 340 bird species and a number of mammal species, including the endemic ice rat and white-tailed mouse. Lesotho forms 70% of the Drakensberg Maloti mountains, which is a globally recognised biodiversity hot spot.

Lesotho ratified the Convention on Biological Diversity (CBD) in 1995 and the Cartagena Protocol in 2003. They also acceded to the Nagoya Protocol in 2015. Lesotho is in line with its CBD reporting obligations with the last national report available being the Sixth National Report. In this report several policy initiatives are mentioned to be implemented that have increased awareness of biodiversity challenges and biodiversity protection. Yet challenges identified include a lack of monitoring and reporting to assess progress and lack of funds and staff to scale up efforts. Lesotho has not submitted an updated National Biodiversity Strategy and Action Plan; the first and only plan submitted is from 2004. Lesotho joined the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) in 2003. It has submitted all required annual national reports, the last one for 2022 in January 2023, but its national legislation remains ranked as Category 3, meaning it does not meet the requirements for the Convention's implementation. Lesotho also

ratified the Ramsar Convention on Wetlands and the Conservation of Migratory Species of Wild Animals in 2004. Lesotho has 1 Ramsar site with a total area of all 434 hectares.

Lesotho has not yet adopted national biodiversity targets but it has reported on the Aichi Biodiversity Targets. Lesotho reports to have 20 species on the IUCN red list of threatened species, including the African Elephant (endangered), lion (vulnerable), the sclater's Golden Mole (vulnerable) and the spotted-necked Otter (vulnerable). The bearded vulture is a critically endangered species, whose risk of extinction Lesotho is trying to address by captive breeding.

1.3.Natural resources

Besides water (see section 1.5 below), Lesotho has significant mineral deposits. Mining activities are largely dominated by diamond mining, the history of which is traced back to 1967. Currently, there are about five operational diamond mines in the country. Lesotho mines, notably Letseng, produce some of the world's biggest and precious diamonds. In recognition of the growing importance of the Mining Sector in the national economy, the government of Lesotho established a Ministry of Mining in 2012 which adopted the Minerals and Mining Policy in 2015, which is still the leading policy document. The vision for the sector put forward in this policy aims to establish a socially and environmentally responsible mining sector (Lesotho Insights, 2022). The leading act is the Mines and Minerals (Amendment) Act, 2022 regulation (Government Gazette, 2022).

Mining activities are said to threaten the water quality in several rivers. In 2022 the Lesotho Highlands Development Authority (LHDA), reported that operations in three of the largest mines continued to pollute water sources critical in the several project catchment areas. Nitrate contamination was found in several rivers with levels up to 120 milligrams per litre, far exceeding the South African National Standards 241:2015 for drinking water that put the maximum contaminant level for nitrate in public drinking water at 11mg/l. As discussed in section 1.5, South Africa imports large amounts of drinking water from Lesotho. For some rivers it is noted that also fertilisers used in farming impact the levels of nitrates.

Lesotho's mineral resource potential also includes significant deposits of clays, including heavy clays, white-firing clays and stoneware clays. Furthermore it has fine-grained basalt and massive dolerites and sporadic and small occurrences of a variety of semi-precious stones (agate, chert, rock crystal amethyst, olivine zircon and chrome diopside) are known to exist (Ministry of Mining, 2015).

Lesotho also has significant forestry resources. FAO reports that the total forest area in Lesotho has been consistent from 2000 to 2015, 34.52 kha (FAO, 2020). The NDC from 2018 includes a reforestation target of 120,000 ha from 2015 to 2030. The target, however, does not seem within reach as from 2000 to 2020, Lesotho experienced a net change of 2.76 kha (0.66%) in tree cover. The gross loss from 2016 to 2022 was 78 ha of tree cover, equivalent to a 1.3% decrease in tree cover since 2000, and 24.7 kt of CO_{2e} (Global Forest Watch, 2023).

Forestry activities are governed by the Ministry of Forestry, Range and Soil Conservation. The Ministry has been mandated to take charge of forestry development activities across the country through tree-planting activities, gully rehabilitation, rangelands improvement and management, and harnessing of water. The Ministry operates in all 10 districts of the country through District Forestry, Range and Soil Conservation Offices (Lesotho NAP Team, 2021).

1.4.Air quality

As in all African countries, air pollution is an issue in Lesotho. In 2019 the average annual concentration of PM_{2.5} is was 27.8 µg/m³, which meets the least stringent interim target

of 35 µg/m³ of the World Health Organization (WHO) Air Quality Guideline, but is still around 4.5 times the regular targeted PM_{2.5} level of 5 µg/m³ (OECD, 2023). A mixed set of activities contribute to air pollution in Lesotho, including waste burning, production of food and textile, tourism, and construction activities. Household burning of wood and biomass, which remains one of the major energy sources for cooking and heating, is a major source of indoor air pollution.

Lesotho ratified the Vienna Convention and the Montreal Protocol on the reduction and consumption of ozone-depleting substances (ODS) in 1994 and the Kigali Amendment to the Montreal Protocol on the reduction of the consumption and production of hydrofluorocarbons (HFCs) in 2019 (untreaties.org). Lesotho is compliant with the reporting requirements. Data reported to the UNEP Ozone Center for the year 2022 shows a constant and gradual decrease in HCFC net consumption – and as this is the only consumption of ODS in the country therewith in net total ODS consumption – from 0.71 tonnes in 2016 to 0.43 tonnes in 2022. Lesotho therewith seems on a path towards the formal deadline to phase out consumption by 2030, although reduction efforts need to speed up to fully meet the target. The same data reports, show that net HFC consumption has a steep increased from 2019 to 2020 but since then decreased to 10 797 CO₂eq tonnes in 2022. A licensing system is in place for ODS but not yet for HFC (UNEP, 2023).

1.5. Water

Water is one of the chief natural resources of Lesotho. Lesotho's mountains are home to many rivers which are the nation's main water sources. The rivers are not only crucial in the provision of fresh water in Lesotho, but they also play an important role in energy generation in the form of hydroelectric power. Water is also an export commodity as Lesotho is the main source of water for neighbouring South Africa's province of Gauteng (Worldatlas, 2023).

Despite these apparent abundant resources and a reported consistent low level of water stress with a share of 2.57% of freshwater withdrawal as a proportion of available freshwater resources has been consistent over the last two decades (FAO, 2022), there are still significant issues of water stress, especially in the lowlands where most of the population lives. Unicef reports that in the percentage of population with access to clean drinking water has increased from 71% in 2015 to 74% in 2022 (Unicef, 2023). Other sources report that the prestigious Lesotho Highlands Water Project further aggravates local water stress in areas in the vicinity of dams in Lesotho (DW.com, 2023 and The Water Project.org, undated). At the same time the LHWP has brought Lesotho significant income (The Water Project.org, undated) and is also expected to do so in the coming years. The World Bank reports that from 2023, construction of the project's second phase is expected to be the main driver of GDP growth in 2023-25 (WorldBank, 2023). The water stress has been and is being addressed by building further dams, such as the Metolong dam project (World Bank, 2020).

There are also various media reports on threats to water quality, especially on chemical pollution from textile industry in rivers and streams in Lesotho (Pulitzer Center, 2023, Daily Maverick, 2023 and Reuters, 2021).

Water resource management and related activities are governed by the Ministry of Water. Main operating bodies include the Lesotho Electricity and Water Authority (LEWA) and the Water and Sewage Company (WASCO). The governing framework is not recent: the National Water Law dates from 2008, the Water Resources Management Policy from 1999 and the Water and Sanitation strategy from 2016 (Ministry of Water, undated). In its 2020-2025 strategic plan WASCO includes targets for a strong increase in water quality and effluent quality (WASCO, undated).

1.6. Waste and chemicals

The key governing regulation on waste in Lesotho is the Environment Act 2008. This act identified the Department of Environment under the Ministry of Tourism, Environment and Culture as the principal authority responsible for supervision and management of toxic and hazardous chemicals and wastes management. Under the Environment Act, the Hazardous Waste Management Regulations were developed in 2012. In January 2022 the Ministry issued the integrated waste management strategy for Lesotho (UNDP, 2022).

The waste management strategy identifies that Lesotho is faced with a range of environmental problems stemming from industrialisation and rapid population growth which has led to a significant increase in the quantity of waste generated, particularly in the densely populated capital of Maseru. There is no local authority that provides waste treatment services and there are no recycling facilities nor controlled landfills. This leads to all kinds of environmental pollution and health risks. There is one company collecting e-waste, but only a small part of e-waste from the corporate sector is collected. E-waste from the public tends to be dumped with general waste in dumpsites and the government e-waste is stockpiled in the ministries (UNDP, 2022). The UNDP helped to establish a waste management system which was launched in June 2022. Furthermore, in March 2023 the Ministry of Environment and Tourism announced the start of a process to introduce e-waste management (Lena, 2023).

Lesotho ratified the Basel Convention on the Control of Transboundary Movements of Hazardous Wastes and Their Disposal in 2000, the Stockholm Convention on Persistent Organic Pollutants (POPs) in 2002 and the Rotterdam Convention on Hazardous Chemicals and Pesticides in International Trade in 2008. In 2012 Lesotho acceded the Ban Amendment to the Basel Convention prohibiting all transboundary movements of hazardous wastes which are destined for final disposal operations from OECD to non-OECD States, which came into effect in 2019. The last available report to the Basel Convention is from 2019, which means that Lesotho is two years behind in its national reporting. In this report Lesotho mentions not to have implemented a national definition of waste used for the purpose of transboundary movements of waste nor a definition of hazardous waste. Lesotho furthermore has not implemented provisions to restrict the export of hazardous wastes and other wastes. There is however a total ban on imports of hazardous wastes and other wastes for final disposal. A National Implementation Plan (NIP) to the Stockholm convention has been submitted in 2005 but has not been updated since. Also, no other reports have been submitted on the implementation of the Stockholm convention.

1.7. Environmental baselines summary

Table 1: Drivers, pressures, impacts and responses across environmental impact areas

Environmental impact area	Drivers	Pressures	State	Impacts	Responses
Climate change	Poor adaptation ability: poor economy, high percentage of population depending on agriculture. High fossil fuel consumption	Higher temperatures, increased droughts, heavy rainfall	Relatively low carbon footprint	Failed harvests, food shortage, high food prices	Adoption PA, drought Response and Resilience Plan, NC3, BUR1 and NAP issued in 2021
Biodiversity & Wildlife	Browsing of the regrowth of harvested woody plants by freely-grazed domestic livestock, lack of financial resources to implement policies	Degradation of threatened species	Rich level of endemic plants, home to 70% of recognised hotspot area Drakensberg mountains	Loss of ecosystems, biodiversity	Ratification of convention of CBD and other MEAs, afforestation and Reforestation,
Natural resources	Export of water resources, mining exploitation	Local water pressure, pollution of rivers, land	High water resources, high mineral resources	Loss of ecosystems biodiversity	Reforestation/-afforestation, increase in natural protected areas,

Environmental impact area	Drivers	Pressures	State	Impacts	Responses
Air Quality	Human activities as biomass and waste burning, food and textile production.	High PM emissions	PM emissions exceeding WHO standard	Negative effects on human health: high death rate and high costs	rehabilitation of wetlands Ratification of Vienna Convention and Montreal Protocol
Water	Poor economic conditions, high water exports, food and textile production, outdated governing framework	Local water shortage, droughts, water quality threats	High water resources	Food poverty, health issues	Donor-funded dams

2. IMPACT SCREENING AND SCOPING

The impact screening shows that focus of addressing environmental challenges lies in the areas of natural resource based production and the risks imposed to this by the negative impacts of climate change.

The National Adaptation Plan identifies food insecurity as one of the highest risks of climate change and mentions that many environmental shocks have already taken place that have impacted the country significantly, especially droughts and heavy rainfall. For example, the drought of 2015/16 affected 979,000 people and resulting in a 66% reduction in cereal production and 58% increase in food prices. A total of US\$82 million (3.6% of GDP in 2016) was mobilized to respond to it. Recurrent droughts in 2017/2018, 2018/2019 and 2019/2020 led to three back-to-back failed harvests, with similar impacts. In response to the humanitarian crisis brought about by the recurrent droughts, the Government of Lesotho developed a Drought Response and Resilience Plan which identifies that US\$83.2 million is required to address the challenges (Lesotho NAP Team, 2021).

One of the support projects that has been completed is the Reducing Vulnerability from Climate Change (RVCC) project, supported by the UNDP with funding from the Global Environment Facility (GEF). This project aimed at increasing resilience to climate change and making the population less vulnerable to environmental shocks imposed by climate change. This was, for example, implemented by providing incentive packages to farmers providing drought-tolerant seeds, agricultural equipment, and improved livestock breeds. In exchange farmers are rehabilitating and resting rangelands, they've improved water-harvesting capacity and other sustainable land management. In January 2022 the project concluded after six years of operation that it led to improved food security, improved production & livelihoods and improved environmental sustainability (UNDP, 2022a).

Other international donors provide similar support. The World Bank, for example, by supporting smallholder farmers diversify their crops, and expand markets (World Bank, 2022). The World Food Programme, among others, is raising awareness on the impacts of climate change especially among vulnerable groups, is building resilience and adaptive capacity of these groups and implements projects such as supporting water conservation for irrigation and household use (Reliefweb, 2023).

The results of the CGE modelling undertaken by DG Trade suggest that changes in trade due to the EPA have had negligible scale effects in total CO₂ emissions, with an increase of 0.00003% in both scenarios. Some structural impacts are visible, with the most significant reductions in CO₂ emissions in motor vehicles and parts (-3.96% in scenario A and -6.20% in scenario B), leather (-1.94% and -1.35%) and wearing (-1.41% and -0.51%) and the most significant increase in CO₂ emissions in textiles (+1.6% and 1.15%). In scenario B additional significant CO₂ emission reductions are shown in computer, electronic, optical products (-7.11%), which partially is a result of Lesotho taking over part of exports to the

EU from Eswatini. Scenario B also shows additional significant increase in CO₂ emissions is shown in electrical equipment (+1.67%), while scenario A shows a slight reduction in CO₂ emissions. This seems to be influenced by Lesotho taking over part of exports to the EU from Namibia and Mozambique. The numbers should, however, be treated with care, given a relatively high uncertainty in emission data and the small absolute numbers.

3. ANALYSIS OF ENVIRONMENTAL IMPACTS THROUGH THE AGREEMENT

The EU-SADC EPA was signed in June 2016. Since then, Lesotho has taken several steps to address climate change. In 2017 a series of policy documents and strategies was adopted. There is however no evidence that this has any links to the EPA. Literature review rather shows that the process of developing these policies and strategies seems to have started well before the signing of the EPA. Also, in later years important documents were issued, such as the National Adaptation Plan that was published in 2021.

The economic analysis shows an increase in Lesotho's non-diamond exports to the EU, but also indicates that more analysis is required to determine the extent to which this growth can be attributed to the EPA. Based on this analysis it could be determined whether there are any scale of structural effects on the environment as a result of the trade agreement. It should, however, be noted that the economic analysis already points out that although the increase in non-diamond exports to the EU appears to be rapid, the total value of exports is still very limited in terms of absolute values. Consequently, the scale effects and structural effects on the environment, if any, are expected to be also limited. Literature review shows that donor support such as from UNDP and the World Bank are aiming to support a transition of smallholder farming in order to increase the value of their production. This may in the future result in technology effects, but it seems too early to observe such an effect in GHG emissions.

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Appendix D5: Country Report Mozambique

1. ENVIRONMENTAL BASELINES

1.1. Climate change

According to the Global Climate Risk Index 2021⁶⁸, Mozambique was amongst the three countries most affected by the impacts of extreme weather events in 2019 (Eckstein et al, 2021). Mozambique also ranked 154 out of 185 countries covered on the ND Gain Index⁶⁹ in 2021. The INFORM risk index⁷⁰ of 2023 puts Mozambique in the 9th place in terms of the exposure of countries at risk from humanitarian crises and disasters that could overwhelm national response capacity (INFORM 2023). An analysis of data from 1980 to 2019 shows that Mozambique was affected by 21 tropical cyclones, 20 flood events and 12 droughts (Republic of Mozambique, 2022). This implies that on average, the country is affected by a tropical cyclone or a flood event every two years and a drought event every three years. The economic losses associated with these events is high. The World Bank estimates damages from the two 2019 cyclones at US\$3 billion (World Bank, 2019) and from the 2023 cyclone at \$1.53 billion (World Bank, 2023).

The country's emissions of greenhouse gases (GHG) are low but increasing due to expansion of agricultural land and wildfires. GHG emissions per capita (including emissions from land use, land-use change and forestry or LULUCF), have grown from 0.6 tCO₂eq in 1990 to 2.1 tCO₂eq in 2021 (Ministry of Land and Environment of Mozambique, 2021). By comparison per capita emissions in the EU27 was 8.15 tCO₂eq in 2021 (Crippa et al, 2023). The comparative GHG emissions per capita without LULUCF is 0.5 tCO₂eq in 1990 and 0.7 in tCO₂eq in 2021 (Ministry of Land and Environment of Mozambique, 2021). Total GHG emissions including LULUCF were 103.81 tCO₂eq in 2020, equalling 0.21% of global emissions (NDC Partnership, Undated). GHG emissions from LULUCF accounted for 67.5% of the country's total emissions. Agriculture contributed 17.5%, while the energy and waste sectors contributed 9% and 4% respectively, of total emissions (NDC Partnership, Undated). It is worth noting however that there are discrepancies in data on absolute GHG emissions and sectoral share of GHG emissions within national documents. Nevertheless, it is clear that land use, land-use change and forestry plays an important role in driving GHG emissions. Land-use change is mainly driven by changes in urbanisation, climate variabilities, and deforestation. Between 2000-2016, annual deforestation stood at 207 272 ha per year (Republic of Mozambique, 2022).

GHG emissions (without LULUCF) are projected to increase from 33.75 MtCO₂eq in 2020 (NDC Partnership, Undated) to 54 MtCO₂eq in 2025 (Republic of Mozambique, 2021) in the absence of national mitigation actions. In its Updated Nationally Determined Contribution to the Paris Agreement covering the period 2020-2025, the Government of Mozambique (GoM) proposes cumulative emissions reduction (without LULUCF) of 40 million tCO₂eq between 2020 and 2025 (Ministry of Land and Environment of Mozambique, 2021).

⁶⁸ The Global Climate Risk Index 2021 analyses to what extent countries and regions have been affected by impacts of weather-related loss events (storms, floods, heat waves etc.).

⁶⁹ The ND-GAIN Index ranks 181 countries using a score which calculates a country's vulnerability to climate change and other global challenges as well as their readiness to improve resilience. The more vulnerable a country is the lower their score, while the more ready a country is to improve its resilience the higher it will be.

⁷⁰ INFORM risk index identifies countries at risk from humanitarian crises and disasters that could overwhelm national response capacity. It is made up of three dimensions - hazards and exposure, vulnerability and lack of coping capacity.

GoM has adopted several institutional policies frameworks and action plans to mitigate and adapt to climate change. These include the National Climate Change Adaptation and Mitigation Strategy 2013–2025, the Updated NDC, Master Plan for Risk and Disaster Reduction 2017–2030, and the National Adaptation Plan Roadmap. Mozambique has issued two national communications (NC) to the UNFCCC till date: NC1 in June 2006 and NC2 in December 2022. In 2022, the country also published its first biennial update report. Responsibilities on climate change are distributed primarily over the Ministry of Planning and Development, the Ministry for the Coordination of Environmental Affairs, and the National Disaster Management Institute.

1.2. Biodiversity and wildlife

Mozambique is characterized by an abundance of natural resources and considerable biological diversity, which support a great diversity of species. With a coastline 2,770 km long, the country also has several marine and coastal habitats, the most important of which are the coral reefs, mangroves and seagrass meadows. As such, the country has four groups of important natural ecosystems: (i) terrestrial ecosystems, (ii) marine and coastal ecosystems, (iii) inland water ecosystems and (iv) coastal ecosystems. These encompass considerable biological diversity estimated at over 6,000 plant species and 4,200 animal species of which 73% are insects, 17% birds, 5% mammals, and 6% reptiles and amphibians (Republic of Mozambique, 2022). Of these species, several are endemic to Mozambique, including 2 species of mammal, 7 reptiles, 11 freshwater fish and 5 vascular plant species (CBD, Undated). There are a total of 300 species on the IUCN Red List in Mozambique, of which 120 are threatened (CBD, Undated).

In terms of coastal and marine biodiversity, there are 194 species of coral, 9 plant species of mangrove, 13 of marine meadows, 5 of turtles, 18 of marine mammals (seven species of dolphins, 8 of whales, 2 of seals and 1 species of sea) are recorded. dugong), 2,626 species of sea fish (800 species associated with coral reefs, 92 cartilaginous fish) and 1,363 species of molluscs (Republic of Mozambique, 2022). The biodiversity of inland waters is equally recognized, notably Lake Niassa and the Zambezi Delta.

Mozambique extended the surface of protected areas from about 11% in 1997 to 16% of its national territory in 2007 (USAID 2008). In recent years, 25% of the country's territory has been declared as conservation areas (Government of Mozambique, 2018). The creation of new national parks, namely, Quirimbas National Park, Limpopo National Park and Chimanimani National Park, and reserves, including coastal and marine environments, has significantly contributed to this. A review of the legislation and policy related to protected area management and governance identified 80 relevant laws and policies in Mozambique (Tessema, 2019). The Government has also formulated a Strategy and Action Plan for the Conservation of Biological Diversity (NBSAP) 2015 – 2035. This Plan recognizes that one of the main causes of the threat to biodiversity is climate change, due to its potential to cause species extinctions, alter their spatial and temporal distribution and alter fundamental biogeochemical and ecological processes. Specifically, extreme weather events affect the long-term viability of biodiversity conservation areas. Climate change is specifically expected to alter marine biodiversity by warming the water column and acidification, leading to bleaching and coral death.

Biodiversity is also under threat from population growth, urbanisation, economic activities, which have led to habitat loss, degradation and fragmentation, and conversion; overexploitation of species; invasion by non-native species that harm ecosystems and native species; and contamination of natural habitats/species. Population growth and development pressures have led to more land being allocated for infrastructure. Other threats include hunting and uncontrolled fires for fauna and vegetation clearing, slash-and-burn agriculture, and uncontrolled fires for flora. Mangrove forests are specifically threatened through deforestation, aquaculture and construction of salt pans while coral reefs are under pressure from coral bleaching and increased fishing and tourism. Marine

biodiversity is under threat from tankers carrying crude oil from the Arabian Gulf that cause spills and discharge polluted ballast waters in the sea off Mozambique's coast.

Finally, wildlife crime remains a severe threat to biodiversity. Elephants and Rhinos, in particular, continue to be threatened by poaching. Mozambique was included as one of the 8 countries identified as of Secondary concern by the CITES Standing Committee CS71. The Government's National Ivory and Rhino Action Plan (NIRAP) 2020-2022 notes that the country is identified as a transit route for illegal trafficking of rhinoceros horns and elephant ivory. Mozambique witnessed a striking decline in savanna elephants during 2009-14 when the country lost 53% of its elephants (Environmental Investigation Agency UK Ltd., 2018). The country has enacted laws over the years to tackle wildlife crime. For example, revisions to the Conservation Law 2014, which came into force in May 2017 clarify that African elephants are fully protected and increase the maximum prison terms for wildlife offences to 16 years. Mozambique has also developed a National Ivory and Rhino Action Plan (NIRAP) 2020-2022.⁷¹

Mozambique ratified the Convention on Biological Diversity (CBD) in 1995 and the Cartagena Protocol in 2002. Mozambique also ratified the Nagoya Protocol in 2014. The country has submitted the Sixth National Report to the CBD.

1.3.Natural resources

About 70% of the country's land surface is covered by vegetation of different categories, of which 41% are forests and 29% correspond to other woody vegetation (Republic of Mozambique, 2022). Forests have contributed to carbon sequestration and protection of water catchment areas, although their value is not known. However, forests are under pressure due to the opening of new areas for agriculture, the use of inappropriate agricultural practices involving logging, uncontrolled burning and the unsustainable use of forest resources in the exploitation of wood and charcoal production (Republic of Mozambique, 2022). 0.79% of forests or 267,000 ha of forests are lost annually (World Bank, 2018). Forest conversion to agriculture is in fact the dominant driver of deforestation contributing 65% of total deforestation (World Bank, 2018). Urban expansion and infrastructure development lead to 12% forest loss (World Bank, 2018).

Indirect drivers that contribute to deforestation and forest degradation in Mozambique include land tenure insecurity, inadequate land use planning and demographic pressure. Land tenure insecurity discourages investments in long-term assets with limited to no immediate returns, including forests and other natural resources. This is made worse by demographic pressure, particularly when agriculturally based population density increases in and close to forested areas.

Mozambique has committed to halt and reverse forest loss and land degradation by 2030. The country has a number of laws and regulations covering forest management, wood harvesting, processing and trade. The Land Law and Forest and Wildlife Law govern and protect forest resource stakeholders by recognizing community rights to land and make community consultation compulsory when assigning rights of use to a third party. The Forest and Wildlife Law, more specifically, regulates the forest, timber and wildlife sectors by placing forests and wildlife under State ownership, allocating long-term concessions and short-term licenses. However, implementation and enforcement of laws and regulations and enforcement continues to remain weak.

Mozambique has also engaged in various initiatives and has signed conventions at the regional and international levels with the aim of promoting the sustainable management of its forest ecosystems and organising against illegal use of forest resources. For example,

⁷¹ See <https://cites.org/sites/default/files/eng/com/sc/74/E-SC74-28-04-A12.pdf>

Mozambique acceded to CITES in 1981. More recently, Mozambique signed the Emission Reduction Payment Agreements with the Carbon Fund of the Forest Carbon Partnership Facility. Mozambique will potentially receive up to US\$50 million until 2024 in four scheduled payments for verified emission reductions worth US\$50 million to support the country's ongoing efforts to reduce carbon emissions from deforestation and forest degradation (commonly known as REDD+) (World Bank, 2019). With this Emission Reduction Payment Agreements, Mozambique is implementing its Emission Reductions Payment Project in nine districts of the Zambézia province.

Mozambique has large untapped deposits of coal (high quality coking coal and thermal coal), as well as mineral resources such as graphite, iron ore, titanium, apatite, marble, bentonite, bauxite, kaolin, copper, gold, rubies, and tantalum. Gold deposits in Niassa, Tete, and Manica Provinces have attracted domestic and international investor interest in recent years (U.S. Commercial Service, 2019). But gold mining has been slow to develop as most of its activities are done by informal artisanal miners (U.S. Commercial Service, 2019).

Systematic studies aimed at assessing the impacts of pollution from mining on biodiversity are practically not existent in Mozambique (Republic of Mozambique, 2014) but the Government of Mozambique notes that in line with the impact of mining elsewhere in the world, mining processes in Mozambique potentially increase the potential for contamination of water resources and consequently the biodiversity linked to these resources (Republic of Mozambique, 2014).

1.4. Air pollution

Data available from the World Health Organization indicates that in 2021, country's annual mean concentration of PM2.5 is four times over the WHO air quality guideline value (WHO, 2021). The country has no legal standards for PM2.5. 38% of deaths from stroke and ischaemic heart disease in the country are caused by air pollution. The main sources of air pollution are industry, growing vehicular pollution, use of fuelwood for energy, agriculture through the use of widespread practice of burning, and waste burning. Population growth has led to the doubling of the country's number of vehicles from 380,343 in 2010 to 698,814 in 2016 (Republic of Mozambique, 2019). 95% of population does not have access to clean fuels and technology for cooking (WHO, 2021).

In terms of governance, the Environmental Framework Law that lays down general provisions for the protection of the environment is the main instrument to control and prevent all types of pollution, including air pollution. Additionally, the 2004 and 2010 Regulation for Environmental Standards and Effluent Emission establish parameters for the maintenance of air quality (Eduardo Mondlane University, 2022). The relevant institution governing pollution issues is the Ministry of Land, Environment and Rural Development which is mandated to implement measures to prevent degradation and control the quality of the environment, as well as in promoting sound management of all effluents.

Mozambique acceded to the Montreal protocol in 1994 and to the Montreal Amendment in 2010. Data reported to the UNEP Ozone Center shows that Mozambique has made progress in the phase-out of HCFCs, the total consumption of which has reduced by almost 70% between 2016 and 2022 (UNEP, undated), and was 2.18 ODP tonnes for 2021 (UNEP, undated). However, HFC consumption has jumped by almost 80% between 2020 and 2022 (UNEP, undated). Mozambique ratified the Kigali Amendment in 2020. There is no HFC licensing system in place.

1.5. Water

Mozambique has abundant surface and groundwater, although 54% of its freshwater resources originate in upstream countries (USAID, 2021). The country has Mozambique has 13 major river basins of which nine are transboundary and 22 smaller basins. At the national level, the country does not suffer from water stress, but the seasonality of some water courses are seasonal means that some regions such as the south of the country experience water stress. The total volume of freshwater withdrawn by major economic sectors is only 1.75% (USAID, 2021).

Upstream over-abstraction, mining in upper basin countries, urban wastewater, and agricultural effluents pose are key risks to water resources. Water quality samples in the Limpopo Basin near Mozambique's international borders indicated high levels of heavy metals and fecal coliforms (USAID, 2021). Coal mining in the Zambezi Basin and gold mining contaminate surface water with acidic drainage and toxic heavy metals (USAID, 2021). Upstream and domestic dams also create risks to ecosystems, including biodiversity loss, especially in the Zambezi Delta (USAID, 2021).

In 2022, 63% of the population, 87% of urban households, and 48% of rural households had access to at least basic water service (UN Water, Undated). Around two-thirds of the population uses groundwater for domestic purposes, mostly through unprotected wells. In 2020, the agriculture, forestry and fisheries sector accounted for 73% of total water consumption (UN Water, Undated). The challenges within the water sector are significant and include weak governance and institutional capacities, gaps in sector financing, and low sustainability of service delivery (USAID, 2020)

Water resource management and water supply services are governed under the Ministry of Public Works, Housing and Water Resources (MOPHRH) which is the is the lead ministry in charge of the water and sanitation sectors, focusing on infrastructure, policy, and regulation. The National Directorate of Water Resources Management (DNGRH) housed within the MOPHRH is responsible for developing water management policies for river basins; ensuring compliance with international treaties on shared water resources; performing regular analysis and assessment of water availability and demand from river basins; and formulating and managing basin-wide water management plans (USAID, 2021). Additionally, there is an inter-ministerial entity called the National Water Council that provides advise on issues related to water management and policy (USAID, 2021). At the sub-national level, there are five Regional Water Administrations. The 2007 National Water Policy and the 2018 National Master Plan for Water Resources Management comprise the country's water strategies.

Mozambique's National Strategy for Development (2015-2035), includes the following water priorities with Water, Sanitation and Hygiene (WASH) and water resources management goals (USAID 2020):

- Increase access to basic water and sanitation services by 2035,
- Service pricing that ensures full cost recovery and increased service coverage, and
- Sustainable sharing of international river basin and integrated water resources management.

Additionally, the Action Plan for the Implementation of the Sustainable Development Goals (SDG's) in the Water Supply and Sanitation Sector 2015-2030 prioritizes the following (USAID 2020):

- Achievement of universal access to basic drinking water (and WASH more broadly) for households, schools, and health facilities,

- Increasing household access to safely managed drinking water and sanitation services by 50%, and
- Progressively ending access inequity.

1.6.Waste and chemicals

Data referring to the amount of waste produced in Mozambique are scarce or not systematized because waste management is autonomous for each municipality or town (Republic of Mozambique, 2022). Mozambique is estimated to have generated 7,247 tons of waste per day in 2012 (Republic of Mozambique, 2022). 69% of the waste is of organic origin, 12% is paper, 10% plastic, and the remainder consists of other types of waste including metals and glass.

Recent statistics put the generation of plastic waste in 2018 at 179 thousand tonnes (IUCN-EA-QUANTIS, 2020). This translates into 6.1 kg per capita per year. Collection rate remains low at 30%, and all collected plastic waste is disposed either in unsanitary landfills or dumpsites, with less than 1% of the plastic waste being recycled (IUCN-EA-QUANTIS, 2020). Around 17 thousand tonnes of plastic waste or 10% of the total plastic waste was estimated to have leaked into rivers and the ocean (IUCN-EA-QUANTIS, 2020).

E-waste is a growing concern in the country as is hazardous waste.⁷² Given the lack of in-country capacity to manage and handle hazardous waste, Mozambique exports this waste to South Africa which has the industrial capacity to reuse or recycle the waste.⁷³

In terms of governance, the management of municipal waste and hazardous industrial waste falls under the Ministry of Land, Environment and Rural Development. There are several legal and normative instruments, which, together, harmonize the solutions that make up a more comprehensive solid waste policy. These include the 2003 Regulation on the Management of Biomedical Waste, the 2006 Regulation on Solid waste Management, the 2012 National Strategy for Integrated Solid waste Management, the 2014 Regulation on Urban Solid Waste Management, the Master Plan for Solid Waste Management for the Municipality of Maputo. There is also a regulation on the management and control of the plastic bags (Basel Convention, 2021). The Government is also establishing new site for waste disposal.⁷⁴

Municipalities have the responsibility for waste management including the preparation and implementation of the local solid waste management plans as well as standards and guidelines for the separate collection. But plans are absent in most cities, data are insufficient to design a proper system, and the economic coverage is not guaranteed because the cost for the collection and treatment of waste is putting increasing pressure on the municipal budget quality (Carbon Africa Limited and AMR, 2014). Currently, all solid household waste collected is deposited in official or unofficial dump sites without proper (if any) treatment or segregation, a situation which leads to a constant need to create new landfills, especially in urban areas quality (Carbon Africa Limited and AMR, 2014). However, there is an informal economy around waste that involves collection of empty plastic bottles from waste and reselling them. This has contributed significantly to the removal of empty plastic bottles from waste.⁷⁵ The Government is exploring Public Private Partnerships (PPPs) in waste management services with the objective of better environmental management and creation of green jobs. However, the private sector in the country lacks and access to technology.

⁷² Interviews conducted with stakeholders in Mozambique by study team

⁷³ Interviews conducted with stakeholders in Mozambique by study team

⁷⁴ Interviews conducted with stakeholders in Mozambique by study team

⁷⁵ Interviews conducted with stakeholders in Mozambique by study team

Mozambique ratified the Basel Convention on the Control of Transboundary Movements of Hazardous Wastes and Their Disposal in 1997 but has not ratified the Ban Amendment to the Basel Convention. Mozambique also ratified the Stockholm convention on persistence of organic pollutants in 2005 and the Rotterdam Convention in 2010. The last available report to the Basel Convention is for 2021, which means that national reporting obligations under the Basel Convention are up to date, but reports to the Stockholm Convention have been overdue since 2009 as the last report was for the period 2006 to 2009. Although Mozambique has a national definition of waste, this is yet to be incorporated in the national legislation. Mozambique has developed and reviewed the National Implementation Plan (NIP) to the Stockholm convention. The latest NIP is from 2019.

As part of the implementation of Rotterdam convention, Mozambique has taken a number of regulatory actions since 2020 to ban chemicals. However, Mozambique has failed to transmit an import response on different chemicals 37 times as of 30 April 2023, with the most recent one being in December 2020 (Rotterdam Convention, undated). Additionally, as of 1999, Mozambique has ratified/acceded to the Bamako Convention on the Ban of the Import into Africa and the Control of Transboundary Movement and Management of Hazardous Wastes within Africa.

1.7.Environmental baselines summary

Table 1: Drivers, pressures, impacts and responses across environmental impact areas

Environmental impact area	Drivers	Pressures	State	Impacts	Responses
Climate change	Global emissions, land use, land use change, increasing the demand for refrigeration and air conditioning	Increased GHG emissions, urbanisation, deforestation	Low carbon footprint	High economic losses, displacement of people, humanitarian crises, rising GHG emissions	Paris Agreement, NDC, National Climate Change Adaptation and Mitigation Strategy 2013–2025, Master Plan for Risk and Disaster Reduction 2017–2030
Biodiversity & Wildlife	Climate change, Habitat loss, degradation fragmentation, and conversion	population growth, urbanisation, infrastructure development, agriculture, tourism, fishing, shipping, climate change	Species rich	Biodiversity loss particularly marine biodiversity	Convention on Biological Diversity, Nagoya Protocol, Strategy and Action Plan for the Conservation of Biological Diversity 2015 – 2035
Natural resources	Deforestation and forest degradation, Mining	Land tenure insecurity, agriculture, mining operations	Loss of forests, poor water quality	Deforestation, poor water quality, loss of biodiversity	Commitment to halt and reverse forest loss and land degradation by 2030
Air Quality	Industrial operations, vehicular emissions, use of fuelwood for energy, agriculture	Economic activities, increase in vehicle use, lack of access to energy	Poor air quality	Negative effects on human health	Regulation on Environmental Standards and Effluent Emission
Water	Upstream over-abstraction, mining in upper basin countries, urban wastewater, agricultural effluents	Water pollution	Poor water quality	Poor water quality, risks to ecosystems	National Water Policy, National Master Plan for Water Resources Management
Waste & Chemicals	Solid waste, Plastic waste	Inadequate disposal, weak sector governance system	Landfilling of waste	Land and water pollution, emission of toxic gases	Waste management legislation and policies

2. IMPACT SCREENING AND SCOPING

The impact screening shows that focus of addressing environmental challenges lies in reducing GHG emissions, particularly from land use, land-use change and forestry, and tackling climate change more broadly as well as addressing biodiversity loss and tackling wildlife crime involving high-value species.

In recent years, the country has been scaling up and implementing the National REDD+ strategy, under which it aims to reduce deforestation by 40%, and to restore 1 million ha of forests by 2030.

In 2015, GoM developed a Forest Investment Plan laying out a large-scale, phased framework and direction for expanding investments outside and within the sector, which furthers the programmatic landscape approach. The Investment Plan has led to the creation of the Multi-Donor Trust Fund by the World Bank for Integrated Forest and Landscape Management. In 2019, Mozambique signed an Emission Reduction Payment Agreements (ERPA) with the Carbon Fund of the Forest Carbon Partnership Facility (FCPF), that holds the potential to unlocking \$50 million to support the country's efforts to reduce carbon emissions from its forest sector. Mozambique is implementing the Emission Reductions Payment Project in nine districts of the Zambézia province until the end of 2024, by when it expects to avoid emissions of 10 million tons of carbon (World Bank, 2021). In 2021, Mozambique received \$6.4 million from FCPF for reducing 1.28 million tons of carbon emissions since 2019 (World Bank, 2021).

GoM also has a suite of sectoral policies and initiatives to tackle climate change. These include the New and Renewable Energy Development Strategy (2011 to 2025), the Conservation and Sustainable Use of the Energy from Biomass Energy Strategy (2014 to 2025), the Master Plan for Natural Gas (2014 to 2030), and the Renewable Energy Feed-in Tariff Regulation (REFIT). Through its biomass energy strategy, Mozambique seeks to modernize the biomass value chain and reduce greenhouse gas emissions; increase the supply of sustainable wood fuels; modernize exploitation, transformation, transport, and commercialization of wood fuels; and increase the efficiency of biomass energy use through improved cook stoves. There are similar policies to enable adaptation to climate change. These include the Technological Action Plan (for Adaptation covering agriculture and coastal zones and infrastructure and mitigation the energy and waste sectors). In the NDC 2020-2025, the country has also committed to the development of Local Adaptation Plans in 123 districts.

However, as the NDC 2020-2025 notes, the implementation of the adaptation and emission reduction are conditional to international climate support. The implementation of any proposed reduction is in fact conditional on the provision of financial, technological and capacity building support from the international community.

A bigger challenge in Mozambique is that climate change is a leading factor contributing to economical challenges, increasing food insecurity, and driving internal migration and displacement across Mozambique. Humanitarian needs are overwhelming in the country, and particularly in Northern Mozambique. OCHA estimates that in 2022, natural disasters affected more than a million people and caused significant damage to infrastructure. Over a million people were reached with some form of assistance in 2022 in northern Mozambique. The tropical storm Freddy in late February 2023 has further overwhelmed the country. Under these circumstances, and with high levels of economic losses, pursuing GHG emissions reduction measures remains difficult.

As far as measures to tackle wildlife crime go, Mozambique has strengthened legislative and judicial systems to tackle wildlife crimes. The Attorney General's Office is also understood to have set up an integrated database so that cases can be monitored from arrest to prosecution to trial (Oxpeckers, 2021).

Finally, the Government has embarked on a process to review the National Environmental Law that dates back to 1997.

The results of the CGE modelling undertaken by DG Trade suggest that changes in trade due to the EPA have had negligible scale effects in total CO₂ emissions, with a decrease of 0.00009% in both scenarios. Some structural impacts are visible, with the most significant reductions in CO₂ emissions in other meat (-9.23% in scenario A and -8.73 in scenario B) and ruminant meat (-1.77% and -1.5%), computer, electronic, optical products (-4.62% and -5.44%), electrical equipment (-3.13% and -3.32%), dairy products (-1.66% and -2.08%), paper and paper products (-2.04% and -3.14%), rubber and plastic products (-1.41% and -1.38%), machinery and equipment (-1% and -1.39%), motor vehicles and parts (-0.86% and -1.57%). In scenario B, additional CO₂ emission reductions are shown as compared to scenario A in other manufacturing (-1.75% as compared to -0.51%), textiles (-1.26% as compared to -0.52%), and metal products (-2.37% as compared to -0.34%). The numbers should, however, be treated with care, given a relatively high uncertainty in emission data and the small absolute numbers.

3. ANALYSIS OF ENVIRONMENTAL IMPACTS THROUGH THE AGREEMENT

As noted in chapter 5 of the main report, Mozambique's products already benefitted from preferential access to the EU market even before the EPA under the Everything But Arms arrangement, and the EPA did not provide any further tariff liberalisation. The analysis of bilateral trade and trade growth rates further show that Mozambique's exports to EU increased from €1.2 billion in 2016 to €1.75 billion in 2018, when Mozambique joined the EPA, dropped to €1.25 billion by 2020 before increasing steeply to €2.9 billion in 2022. By contrast, total GHG emissions including LULUCF decreased from 109.32 tCO₂eq in 2016 to 103.81 tCO₂eq in 2020 (NDC Partnership, Undated). Emissions excluding LULUCF however increased marginally from 31.8 tCO₂eq in 2016 to 33.7 tCO₂eq in 2020 (NDC Partnership, Undated). This increase came from agriculture, waste, and industrial processes. However, since total exports from Mozambique to EU don't show a consistent increase, it can be concluded that other factors are likely in play. Hence, there does not seem to be a scale effect from the Agreement.

In the period following the entry into force of the EU-SADC EPA, Mozambique has taken several steps to reduce GHG emissions and adapt to climate change. This is especially observed in 2021, when the GoM updated the country's NDC with more ambitious targets. In 2019, Mozambique signed the ERPA with the FCPF and is now the first country in the world to have received emissions reductions payments from FCPF. There is however no evidence that these developments are linked to the EPA. Mozambique's suite of policies also predate the EPA, suggesting that efforts to tackle climate change and adapt to climate change are not linked to the EPA.

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Appendix D6: Country Report Namibia

1. ENVIRONMENTAL BASELINES

1.1. Climate change

Namibia is one of the largest and driest countries in sub-Saharan Africa, characterized by high climatic variability through persistent droughts, unpredictable and variable rainfall patterns, variability in temperatures and water scarcity. The climate is generally hot and dry with sparse and erratic rainfall. With two deserts, the Namib and the Kalahari, taking over large portions of the country's land, 92% of the land area is defined as very-arid, arid or semi-arid to the east and west, respectively. As a result, the country ranks second in aridity after the Sahara Desert.

Namibia is highly vulnerable to natural disasters such as persistent droughts due to erratic and variable rainfall patterns, high temperature variability, and scarcity of water. At the same time, flooding is an annually recurring event which is worsening each year, with the northern and north-eastern regions being the worst affected. Warming in Namibia has been higher than the global average.

Namibia was a net greenhouse gases (GHG) sink over the period 1990 to 2016 as the land category removals exceeded emissions from the other categories. While the net removal of CO₂ increased by 50% between 1990 to 2016, the country recorded an increase of 8% in emissions (Republic of Namibia, 2021a). Total emissions in 2016 were estimated at 21.26 MtCO₂e (Republic of Namibia, 2021a) and emissions with LULUCF stood at 12.32 MtCO₂e (NDC Partnership, Undated). In 2020, total emissions were at 24.12 MtCO₂e (Republic of Namibia, 2021a) and emissions with LULUCF stood at 13.56 MtCO₂e (NDC Partnership, Undated). Per capita emissions of GHG however decreased gradually from 13.7 tonnes CO₂eq in 1990 to reach 9.1 tonnes in 2016 (Republic of Namibia, 2021a). In terms of sectors, the Agriculture, Forestry, and Other Land Use (AFOLU) sector was the leading emitter during this period followed by the energy sector. The Government notes that the waste sector doubled its emissions over the past 10 years, whereas energy has seen a 121% increase in emissions over the same period; indicating the growing demand for power in the country (Republic of Namibia, 2021c).

The country's response to climate change is outlined in the National Climate Change Policy of 2011 and the National Climate Change Strategy and Action Plan 2013-2020 (NCCSAP). The NCCSAP was replaced by the NDC Implementation Strategy and Action Plan for 2021-2030 following Namibia's updated Nationally Determined Contribution (NDC) of 2021. In the Updated NDC, Namibia has made the ambitious commitment to reduce emissions by 91% by 2030 compared to the business-as-usual (BAU) scenario (see Figure 1), of which 78.7% is from the AFOLU, and achieve net zero emissions by 2050. As such, Namibia aims to become the first zero emissions country in Africa (World Bank, 2023). 77% of emissions reduction is contingent to international support (Republic of Namibia, 2021b). Additionally, Namibia's fifth National Development Plan (NDP) covering the seven years from 2017/18-2021/22 included an intermediate emissions reduction target of 30% against BAU projection by 2022. This target is a carbon budget which the country can 'spend' in diverse ways by allocating emission rights and commitments among those sectors most responsible for greenhouse gas emissions (Republic of Namibia, 2021b). Climate goals are also integrated in national plans. The Harambee Prosperity Plan II (HPP-II), launched in March 2021, is Namibia's presidential socioeconomic development plan, which articulates Namibia's plans for low carbon growth.

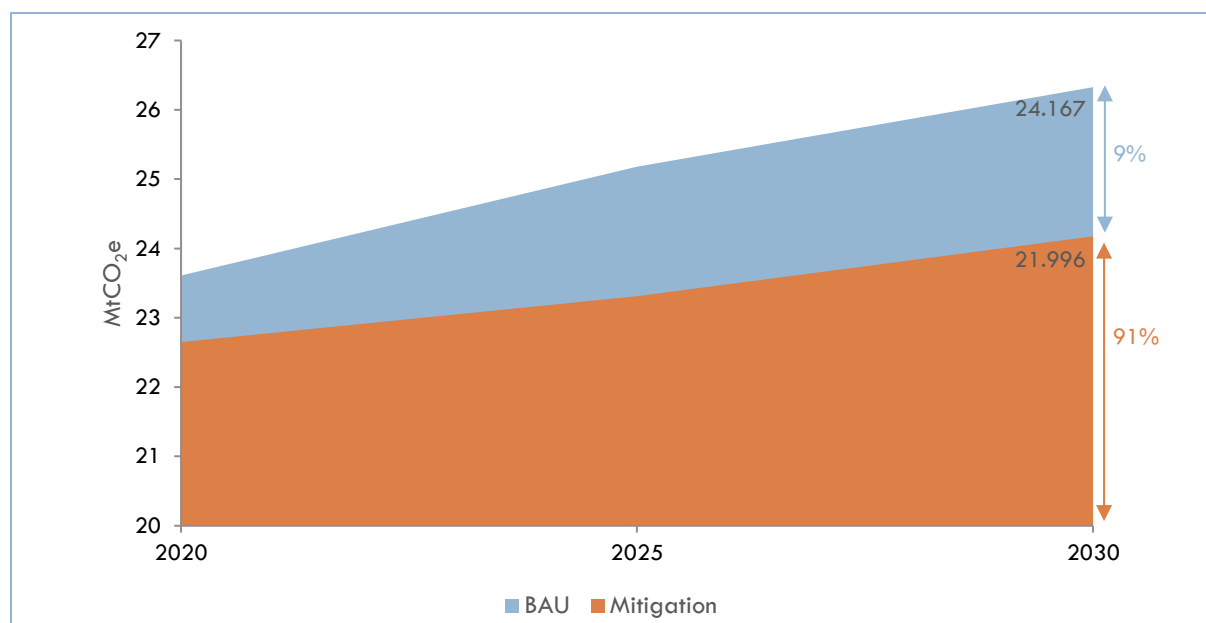
Mitigation measures within the AFOLU sector are expected to account for the highest proportion of emissions reduction (approximately 79%). Although Namibia's land sector is likely to remain a sink, it may become carbon neutral under the BAU scenario. Mitigation

measures include reforestation, agroforestry, and urban forestry and are targeted towards reducing the deforestation rate by 75% from 0.9% per year to below 0.25% (Republic of Namibia, 2021b).

Namibia ratified the UNFCCC in 1995 and was one of the first countries to ratify to the Paris Agreement in 2016. Namibia was also one of the first Non-Annex I Parties to prepare a Biennial Update Report (BUR) for the United Nations Framework Convention on Climate Change (UNFCCC). To date, Namibia has submitted four BURs, four NCs and two National GHG Inventory Reports to the UNFCCC. Namibia formulated a National Climate Change Policy in 2013.

The Ministry of Environment, Forestry and Tourism (MEFT) is responsible for coordinating, managing climate change issues in the country as well as for coordinating the implementation of environmental laws. The Ministry has a dedicated climate change unit. Until 2021, there was a multi-sectoral National Climate Change Committee that comprises representatives from relevant ministries and other stakeholders including the private sector, civil society, academia and implementing partners and oversees the implementation of the climate change policy, including the preparation of reports to the UNFCCC. However, this was replaced by the amalgamated National Committee on the Rio Conventions (NCRC), which merges all three Rio Conventions viz. Framework Convention on Climate Change, Convention on Biological Diversity (CBD) and Convention to Combat Desertification under one umbrella to streamline the work (Republic of Namibia, 2021d).

Figure 1: Namibia's mitigation contribution against business-as-usual (BAU)



Source: Republic of Namibia, 2021b

The figure illustrates the emission projections for the BAU scenario and Namibia's mitigation contribution for all measures (unconditional and conditional). By 2030 avoided emissions are estimated to be around 21.996 MtCO₂e, representing a reduction against BAU of around 91% (figures are given in Table 2.4.). With no measures, emissions are estimated to total around 24.167 MtCO₂e, equal to 8% more than the mitigation scenario by 2030.

1.2. Biodiversity and wildlife

Namibia is one of the few dryland countries in the world with internationally recognized biodiversity hotspots. The most significant of these is the Tsau Khaeb (formerly Sperrgebiet), situated in the Succulent Karoo floral kingdom in southern Namibia. This

hotspot area has a unique biodiversity of terrestrial and marine species. The Succulent Karoo is the world's only arid hotspot (WBG, 2021). The second hotspot is the rugged Namib Escarpment, which is part of Africa's great western escarpment, and is an area of particularly high endemism.

Namibia is home to world's largest populations of cheetah and free-roaming black rhino, and increasing populations of other globally threatened mammals. The country has recorded more than 4,500 plant taxa, almost 700 of which are endemic to the country, and a further 275 of which are Namib Desert endemics (WBG, 2021). Other areas of concentrated endemic plant species are the Kaokoveld in the northwest, the Otavi highland in the Kalahari basin, the Kavango region in the northeast, the Auas Mountains on the western edge of the central plateau, and the southern Namib (WBG, 2021). Namibia's coastline also displays exceptionally high biological productivity. The marine ecosystems off the coast are influenced by the cold Benguela Current System and support some of the highest concentrations of marine life in the world (MEFT, 2020). Finally, Namibia has wetland systems that include marine, estuarine, riverine, lacustrine and palustrine systems. Occupying less than 5% of land cover, they are among the country's most threatened ecosystems.

The country's terrestrial biodiversity and ecosystems are displaying a decline mainly due to anthropogenic rather than natural influences. Several species are on the IUCN Red List. These include plants (e.g. *Aloe ramosissima*), birds (e.g. African Black Oystercatcher), reptiles (e.g. Berger's Cape Tortoise), amphibians (e.g. Desert Dew Frog) and mammals (e.g. Black Rhinoceros). Fourteen species are in the 'Critically Endangered' category, 35 are 'Endangered' and 83 are 'Vulnerable' (Republic of Namibia, 2021b).

Key challenges to biodiversity come from the impacts of continued population growth; unsustainable land management practices leading to soil erosion, land degradation, deforestation and bush encroachment; and consumption and production patterns, as well as climate change. Projections of the impacts of climate change on biodiversity indicate a reduction in vegetation cover over the central highlands by the 2050s, with further reductions towards the 2080s (WBG, 2021). Overall, projections show species loss of 40%–50% in 2050 and 50% and 60% by the 2080s (WBG, 2021). The patterns of loss will vary considerably spatially. The greatest absolute plant biodiversity cover reductions are projected for the Kaokoveld region in the extreme north-west and in the Kalahari basin in the south-east, with less significant reductions recorded at higher altitudes in the central highlands.

Unsustainable water uses mainly through large scale irrigation, pollution, damming and over-abstraction of groundwater is another significant challenge as are forest and wildfires, especially in the north-eastern part of the country. It is estimated that fires damaged between 3 and 7 million hectares of land annually (WBG, 2021), leading to destruction of biodiversity.

The mining sector also poses threats to biodiversity. There are major overlaps in the location of critically endangered species, rare biodiversity areas and the presence of minerals in Namibia; meaning that biodiversity is significantly affected by the mining sector. Uncontrolled mining (particularly uranium and off-shore diamond mining) and prospecting are amongst key threats to biodiversity. Off-shore mining and exploration is also amongst the leading threats to fish and aquatic invertebrate stocks as well as aquatic plants along with land-based pollution, invasive species and inconsistencies in the Benguela upwelling system.

Finally, wildlife crime remains a severe threat to biodiversity. Over the years, there has been an increase in registered cases of wildlife crimes involving high-value species. Data on wildlife crime cases is collected for high-value species: elephant, rhinoceroses (black and white rhino combined) and pangolin. Between 2018 and 2019, wildlife crime registered

cases related to high-value species grew from 115 to 174 (Republic of Namibia, 2021b). On average, a new wildlife crime case was registered somewhere in Namibia each day during 2019. Nearly half of them were related to high-value species. While Rhinos represent the most valuable and sought-after wildlife crime target, data for 2019 indicates that pangolin was the most-targeted high-value species, representing 21% of all cases (Republic of Namibia, 2021b).

Namibia is a signatory to the CBD, having ratified the CBD in 1997 and the Cartagena Protocol in 2005. Namibia acceded to the Nagoya Protocol in 2014. The country has submitted the Fifth National Report to the CBD and the Sixth National Report is still pending. The Namibian Government has formulated National Biodiversity Strategy and Action Plans, with the second one or NBSAP2 being for 2013 – 2022. NBSAP2 has five key strategic objectives with a total of 17 targets, closely aligned to the Aichi Targets. Additionally, over 43% of Namibia's land area is under conservation management, with some 17% of Namibia formally protected within 20 state-run protected areas (Republic of Namibia, 2021b).

1.3.Natural resources

Namibia is one of the world's most important diamond exporters, and the fifth largest uranium producer. Namibia also produces copper, magnesium, zinc, silver, gold, lead, semi-precious stones and industrial minerals. While the mining industry plays a vital role in the growth and development of the economy, it does impact environmental resources, in particular biodiversity, water resources and waste. Illegal sand mining has been an increasing challenge in several areas in Namibia over the past decade, especially in the Northern part of the country.

The Namibian government has formulated the National Policy on Prospecting and Mining in Protected Areas to increase the protection of the country's natural resources from mining activities. Targeting the period 2018-2022, the policy aims to ensure that prospecting and mining activities do not cause any negative impacts to biodiversity, ecology and the tourism potential of protected areas. It identifies protected areas that should not be exposed to prospecting or mining activities, due to their high conservation, as well as aesthetic and tourism, value.

1.4.Air pollution

The International Association for Medical Assistance to Travellers (IAMAT) evaluates air quality in Namibia in accordance with the guidelines. IAMAT notes that air quality is moderately unsafe with the most recent data indicating that the country's annual mean concentration of PM_{2.5} is 25µg/m³, exceeding the recommended maximum of 10µg/m³ by the World Health Organization (WHO) (Republic of Namibia, 2021c). A study on the particulate matter concentrations in the capital city of Windhoek found particulate matter levels above thresholds of American, German and EPA standards (Namibia Nature Foundation, 2022).

The poor air quality is attributable to fires that are a natural phenomenon in savannah landscapes and are used as a management tool, food processing, the mining industry, vehicle emissions and waste burning. However, Namibia also has naturally high dust levels. Episodic dust storms due to easterly winds are common in the western parts of the country throughout the winter months. The easterly winds transport dust over long distances towards the Atlantic Ocean.

In terms of governance, pollution related issues are mainly governed under the Environmental Management Act of 2007 and the Atmospheric Pollution Prevention Ordinance of 2009 that provides guidelines on smoke control and fuel burning, dust control and the prevention of dust pollution of the atmosphere.

Namibia acceded to the Montreal protocol in 1993 and accepted the Montreal Amendment in 2007. Data reported to the UNEP Ozone Center shows that Namibia has been reporting regularly on the Montreal Protocol since 2016. HCFC consumptions stood at 0.38 ODP tonnes in 2022 (UNEP, undated). However, HFC consumption exhibits significant fluctuation annually between 2018 and 2022 (UNEP, undated). HFC consumption stood at 329242 CO₂ eq tonnes in 2018; increasing to 796190 CO₂ eq tonnes in 2020 then declining to 352865 CO₂ eq tonnes in 2021 and rising again to 652217 eq tonnes in 2022 (UNEP, undated). Namibia also accepted the Kigali agreement in 2019. A HFC licensing system has been in place since January 2021.

1.5. Water

Water scarcity is one of the major primary limiting factors to development in Namibia. Evaporation rates are very high with potential evaporation being at least five times greater than average rainfall. Of the water that Namibia receives as precipitation, it is estimated that only 2% ends up as surface run-off and just 1% becomes available to recharge groundwater. The balance of 97% is lost through direct evaporation (83%) and evapotranspiration (14%). Rainfall often evaporates before it reaches the ground.

The primary sources of water supply in the country are all rivers, surface and groundwater (alluvial) storage on ephemeral rivers, and groundwater aquifers in various parent rocks. Additionally, unconventional water sources have been adopted to augment the limited traditional sources. About 45% of the country's water supply comes from groundwater sources, 33% from the Border Rivers, mainly in the north, and about 22% from impoundments on ephemeral river (Republic of Namibia, 2018).

In 2022, 86% of the population, 96% of urban households, and 74% of rural households had access to at least basic water service (UN Water, Undated). The agriculture sectors accounts for about 75% of all water use and is the largest consumer of water (WBG, 2021). A bigger challenge is that water productivity in the agriculture sector is far below average (WBG, 2021). Households use about 12% of the total available water, of which urban areas use about 3 times more than rural areas (WBG, 2021). The mining sector accounts for 10% the water usage (Republic of Namibia, 2021c). There exist examples of construction of desalination plants and wastewater treatment plants by certain mines to mitigate the level of water stress on groundwater and surface water (Musiyarira and Dzinomwa, 2017).

It is likely that climate change trends will lead to an increase in drought frequency and intensity as well as an increase in the physical area of drought proneness in Namibia. This will likely impact water scarcity. Many cities and towns are 100% reliant on groundwater, making them vulnerable to impacts on aquifers. Competing demands from household consumption and agriculture will exacerbate water stress during dry periods.

Water resource management and water supply services are governed by the Ministry of Agriculture, Water and Land Reform (MAWLR). The country is undertaking significant policy reform for the water sector. The first Integrated Water Resources Management (IWRM) Plan was developed in 2010 and came into force in June 2012. This was followed by the Water Resources Management Act (WRMA) in 2013, which recognized an IWRM Plan as a crucial tool for developing, conserving, managing, and controlling Namibia's water resources. In 2021, Namibia commenced the review and update of the National Integrated Water Resources Management Plan under the ongoing Namibia Water Sector Support Program (NWSSP) funded by the African Development Bank (Republic of Namibia, 2021e). Amongst other objectives, the NWSSP is supporting strengthening of institutional capacity, sustainable management, and utilization of water resources (AFDB, 2023).

The Namibia Water Corporation Ltd (NamWater) is responsible for supplying water in bulk to industries, government institutions, municipalities, local authorities, commercial entities such as mines and to the Directorate of Water Supply and Sanitation in the Ministry of

Agriculture, Water and Forestry. This Directorate supplies water to rural communities. NamWater has done a significant amount of planning and work to improve water infrastructure in Namibia and respond to projected future water demand. In 2018-2019, NamWater had over 45 water infrastructure development projects underway, which include the rehabilitation of dilapidated water pump stations and distribution canals across the country (Republic of Namibia, 2021c). However, a key challenge in sustainability of the water sector is customer tariffs, which poses a barrier to investments in infrastructure and maintenance. The Water Regulator is now developing a pricing policy for services in the water sector, which will set out norms and standards for the fixing of tariffs and charges for these services (Republic of Namibia, 2022). The government is also assessing the feasibility of establishing a Water Scarcity Fund which will preserve funds for emergencies related to drought and to explore the possibility of converting a portion of its tariff to a basic charge that will cater for water infrastructure replacement (Republic of Namibia, 2022).

1.6. Waste and chemicals

In the absence of an integrated waste data management system, statistics on waste generation remain unreliable. The Namibian Government estimates annual solid waste generation at between 75 and 550 kilotons per year (Republic of Namibia, 2021c). Solid waste management and particularly recycling in Namibia are constrained by the large transport distances and the high transport costs.

There is only one fully operating landfill site located in Windhoek. The solid waste management in the rest of the country is conducted at waste sites with no proper control or management. It is estimated that approximately 69% of the country's solid waste ends up in open dumps and is generally burned to reduce health risks (Republic of Namibia, 2021c).

In 2017, the Namibian Government developed and adopted a National Solid Waste Management Strategy to strengthen the legal, institutional and budgeting framework for solid waste management. One of the main objectives of the strategy is to install a widespread culture of waste minimisation and to expand recycling systems. The strategy also establishes qualitative waste disposal standards that are then proposed to be finalised in the solid waste management regulations. The strategy is divided into time-bound phases; wherein phase 1 is for the implementation framework (2017-2019), phase 2 is for the implementation of the core components (2018-2022), phase 3 involves the development of major infrastructure (2020-2023) and the final phase is devoted to updating the strategy (2023). To ensure adequate data and information on waste quantities and practices for planning purposes, the Namibian Government intends to develop a Namibian system for waste collection that can effectively cover the scope of Namibia country (Republic of Namibia, 2021c).

Namibia ratified the Basel Convention on the Control of Transboundary Movements of Hazardous Wastes and Their Disposal in 1995 and the Ban Amendment to the Basel Convention in 2019. Namibia also signed the Basel Convention Plastic Waste Amendments in 2020. The last submitted reports to the Basel Convention were in 2020 and 2019. The only other report submitted by Namibia was in 2015. The country also lacks a national definition of waste. As such the definition of hazardous waste is not included in its national waste regulation.

Namibia also ratified the Stockholm Convention on Persistent Organic Pollutants and the Rotterdam Convention in 2005. Namibia developed a National Implementation Plan for the Stockholm Convention on Persistent Organic Pollutants in 2014 and updated it in 2022. No reports have however been submitted till date. Namibia has also not taken regulatory actions to support implementation of the Rotterdam Convention (Rotterdam Convention,

undated). As of 30 April 2023, Namibia has failed to transmit an import response on different chemicals 53 times (Rotterdam Convention, undated).

Additionally, Namibia is signatory to the Bamako Convention on the Ban on the Import into Africa and the Control of Transboundary Movement and Management of Hazardous Wastes within Africa all focusing on hazardous waste.

1.7. Environmental baselines summary

Table 1: Drivers, pressures, impacts and responses across environmental impact areas

Environmental impact area	Drivers	Pressures	State	Impacts	Responses
Climate change	Global emissions, AFOLU, waste	Increased GHG emissions	Low carbon footprint	Economic and social impacts	Paris Agreement, NDC, number of climate change policies
Biodiversity & Wildlife	Population growth; unsustainable land management practices leading to soil erosion, land degradation, deforestation	Population growth, unsustainable water use, mining, wildlife crime	Species rich, Biodiversity hotspot	Decline in terrestrial biodiversity and ecosystems	Convention on Biological Diversity, National Biodiversity Strategy and Action Plan for 2013 – 2022
Natural resources	Mining	Mining operations, Illegal sand mining	Minerals rich	Impact on biodiversity, water resources and waste	National Policy on Prospecting and Mining in Protected Areas
Air Quality	Fires, food processing industry, mining industry, vehicular emissions, waste burning, naturally high dust levels	Economic activities, increase in vehicle use	Poor air quality	Negative effects on human health	Environmental Management Act of 2007, Atmospheric Pollution Prevention Ordinance of 2009
Water	Natural water scarcity, high evaporation rates	Climate change, population growth	Water scarcity	Water scarcity, exacerbated water stress during dry periods	Integrated Water Resources Management Plan, Water Resources Management Act 2013
Waste & Chemicals	Solid waste	Inadequate management and disposal	Open dumps, waste burning	Land and water pollution, health risks	National Solid Waste Management Strategy

2. IMPACT SCREENING AND SCOPING

The impact screening shows that focus of addressing environmental challenges lies in increasing GHG emissions from the energy sector, addressing impact of mining on biodiversity, and tackling wildlife crimes involving high-value species.

Namibia is heavily dependent on imports for its energy supply. All fossil fuels (coal, fuels) are imported. Despite the small population and the low electrification rate of 56%, only about 40% of the country's electricity needs can be met from its own generation capacities. Namibia is dependent on electricity imports from neighbouring countries, which met about 60% of total demand in 2020. The majority of electricity imports are sourced from South Africa.

To address the emissions intensity of the electricity sector, Namibia has set a target of 70% of electricity generation (as kWh) in 2030 to come from renewable energy sources under its 2017 National Renewable Energy Policy. NamPower, Namibia's state-owned power utility, has implemented competitive auctions to procure utility-scale solar PV independent power projects (IPPs). In 2015, the country had no utility-scale renewable energy

installations and no private power sector investment. In 2020, Namibia had the fourth-most IPPs in sub-Saharan Africa – all renewable energy-based – representing more than 25% of the country’s installed generation capacity. Besides the growth in IPPs, Namibia has also seen rapid growth in renewable energy-based embedded generation installations that produce power for self-consumption or are compensated through a net-metering policy. This has increased the contribution of privately owned and operated renewable energy generation capacity to at least 31%. Namibia is also the country in the region with the cheapest, local currency-based utility-scale solar PV project and with no sovereign support.

As far as measures to tackle wildlife crime go, Namibia initiated Operation Blue Rhino in July 2018 to counter rhino poaching, for an initial period of three months and has extended it several times. Additionally, Namibia’s office of the Prosecutor-General established an Environmental Crimes Unit during 2019 to enhance successful prosecution. The Office of the Prosecutor General also held Special Courts dedicated to wildlife cases in priority regions during 2022. The initiative resulted in the finalisation of 121 cases within one month in four locations (Ministry of Environment, Forestry and Tourism, Namibian Police Force, and Office of the Prosecutor General, undated). While there is still a significant backlog of wildlife cases remains on the court roll, this is no longer increasing at the rate experienced in earlier years. The National Police Force and the Namibian Defence Force have been given the mandates to deal with wildlife crime. Pro-active, country-wide law enforcement has also helped reduced elephant and rhino poaching in Namibia. Verified rhino and elephant losses have been reduced by about 60% between August 2018 to July 2021 (Ministry of Environment, Forestry and Tourism and Ministry of Home Affairs, Immigration, Safety and Security, 2021).

Attempts to deal with wildlife crime cases as quickly as possible however face challenges with rapidly growing number of new cases and the need to allocate resources to new cases than to older, often extremely complex cases (Ministry of Environment and Tourism and Ministry of Safety and Security, 2020). Although the allocation of time and financial resources enables rapid successes in many cases, there is slows the rate of success during intricate follow-up investigations (Ministry of Environment and Tourism and Ministry of Safety and Security, 2020).

Information on measures taken to address the impact of mining on biodiversity is limited. However, the mining industry, the Namibian government and the Namibian Chamber of Environment have jointly developed a best practice guide to assist the mining sector in effectively addressing potential challenges, such as environmental and social impacts, and developing joint action engagement that is best suited to specific circumstances. They have also developed a guide on environmental principles for mining to assist the Namibian mining industry in the responsible development of mineral resources, by delivering practical mining solutions and by benchmarking best practices from companies who conform to sound environmental and social principles.

The results of the CGE modelling undertaken by DG Trade suggest that changes in trade due to the EPA have had negligible scale effects in total CO₂ emissions, with an increase of 0.000012% in scenario A and 0.0000049% in scenario B. Significant structural impacts are visible, with reductions in CO₂ emissions in several sectors in both scenarios. The most significant reductions in CO₂ emissions can be observed in paper and paper products (-25.63% in scenario A and -22.62% in scenario B), coal (-12.8% and -11.50%), other transport equipment (-12.05% and -10.25%), and other meat (-14.31% and -16.97%). Significant increase in CO₂ emissions in ruminant meat (4.08% and 4.69%), vegetables, fruits, and nuts (3.67% and 3.96%), and cattle (3.07% and 4.07%). Scenario B shows significant decrease in CO₂ emissions for wheat (-3.80%) where A scenario A shows increase in emissions (2.16%). The numbers should, however, be treated with care, given a relatively high uncertainty in emission data and the small absolute numbers.

3. ANALYSIS OF ENVIRONMENTAL IMPACTS THROUGH THE AGREEMENT

The analysis of bilateral trade and trade growth rates in chapter 5 of the main report concluded that exports from Namibia to EU27 have increased by about 50%, from €905 million in 2011 to €1.3 billion in 2022. The analysis further shows that exports increased most until 2017, then dropped in 2019 and 2020 before picking up again in 2021 and 2022, to reach levels slightly above 2017 and 2018. The analysis further notes that the EPA has had no impact, as much of the growth in exports occurred before the start of the Agreement's application. Namibia was already benefitting from unilateral preferential access to the EU before the EPA. Therefore, the EPA provided only limited changes in access to the EU market.

Since the economic analysis concludes that the EPA has had no impact in Namibia's exports to the EU, it can be concluded that the increase in emissions in Namibia are not attributable to the EPA. Therefore, there is no scale effect from the agreement. The value of exports for all sectors shows similar variation trends as the total exports. However, emissions from energy sector have increased dramatically. This suggests that there is no structural effect.

In the period following the entry into force of the EU-SADC EPA, Namibia has demonstrated impressive evidence of renewable energy. This is however not attributable to the EPA. Literature review suggests that this development is in fact linked to South Africa's electricity and economic crisis. Namibia's dependence on South Africa for electricity imports meant that South Africa's worsening electricity supply shortages that started in 2008 led to growing energy insecurity in Namibia and pushed up the cost of power as South Africa's state-owned electricity utility ESKOM embarked on its massively expensive and flawed capital expansion program (Kruger, 2022).

Moreover, the Namibian dollar is pegged to the South African rand, and about 35% of the government's revenue comes from the Southern African Customs Union, which is effectively financed by South Africa (Kruger, 2022). Many of the companies listed on the Namibian Stock Exchange also have South African links, while the Namibian financial industry is closely tied to South Africa's (Kruger, 2022). The slow down of South Africa's economy in the post-2008 period had a significant and disproportionate impact on Namibia's economic growth. This situation was exacerbated by falling oil prices, which impacted Angola, a major regional partner for Namibia (Kruger, 2022). The resultant reduced fiscal space coupled with energy insecurity was the driver for renewable energy growth with private power investment. During this time, South Africa had started implementing its REI4P program, demonstrating to the region that cost-efficient renewable energy investment was possible (Kruger, 2022).

Literature review therefore suggests that the development of renewable energy is not linked to the EPA. There is also no evidence to suggest that the measures to tackle wildlife crime or to assist the mining industry to address potential environmental impacts are linked to the EPA.

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Appendix D7: Country Report South Africa

1. ENVIRONMENTAL BASELINES

1.1.Environmental baselines

The main responsible body for environmental affairs in South Africa is the Department of Forestry, Fisheries and the Environment (DFFE). This department is responsible for protecting, conserving and improving the South African environment and natural resources. It was created in 2019 by the merger of the Department of Environmental Affairs with the forestry and fisheries components of the Department of Agriculture, Forestry and Fisheries. The DFFE has specific branches for among others air quality and climate change, biodiversity & conservation, and chemicals and waste management. They are supported by various institutes such as the water institute and the South African National Biodiversity Institute (SANBI).

In June 2022 the National Environmental Management Laws Amendment Act No. 2 (NEMLAA4) was approved with the majority of the provisions taking effect on 30 June 2023. Many of the amendments in NEMLAA 4 have been made to address a wide range of issues that were associated with the One Environmental System (“OES”) that was implemented in 2014, which overhauled the manner in which environmental aspects are addressed. The changes in NEMLAA 4 aim to deter non-compliance with environmental laws by, among other things, introducing new offences, increasing the quantum of fines and administrative penalties where laws or licences have been contravened, and will extend enforcement powers to enable more widespread enforcement of environmental laws. The amendments will affect several pieces of legislation: the National Environmental Management Act, 1998, the National Environmental Management: Air Quality Act, 2004, the National Environmental Management: Waste Act, 2008, the National Environmental Management: Protected Areas Act, 2003, the National Environmental Management: Biodiversity Act, 2004, the National Environmental Management: Integrated Coastal Management Act, 2008 and the National Environmental Management Amendment Act, 2008 (Beech Veltman, 2023).

1.2.Climate change

South Africa occupies the most southern tip of the African continent, with a long coastline stretching more than 3 000 km. South Africa has a subtropical location, but temperatures tend to be lower than in other countries at similar latitudes owing mainly to greater elevation above sea level. The temperature is furthermore moderated by ocean on three sides of the country. South Africa is a relatively dry country, with an average annual rainfall of about 464 mm. While the Western Cape gets most of its rainfall in winter, the rest of the country is generally a summer-rainfall region.

The ND-GAIN Index does not rank the country as highly vulnerable to climate change, ranking it as the 111th most vulnerable country out of 185 countries. It however also ranks it as having a relatively low readiness to improve resilience, ranking it as the 120th most ready country (University of Notre Dame, 2021). However, the country is already experiencing the impacts of climate change. Since 1990, the national average temperature has increased at a rate of more than twice that of global temperature increases, which is already resulting in more frequent droughts and extreme weather events (Republic of South Africa, 2021). In recent years, the country also experienced the effects of either prolonged droughts or devastating floods. Climate change also threatens water resources, food security, health, infrastructure, ecosystem services and biodiversity and other sectors of the economy (Republic of South Africa, 2020).

The Government of South Africa has in recent years spurred its climate ambitions. In line with its ratification of the Paris Agreement on 1 November 2016 it had submitted some reports, including submission of the first INDC in September 2015 and national communications to the UNFCCC in 2003, 2011 and 2018. Significant changes occurred in 2021, with the publication of the updated NDC in September 2021 and submission of the first National Adaptation Plan on 29 September 2021. South Africa's 2050 Low-Emission Development Strategy, submitted to the UNFCCC in 2020, formulates the goal of net zero emissions by 2050. The governance and regulatory framework, however, is not in line with these recently formulated goals. The net-zero target is not yet enshrined in law and the current regulatory basis for climate change governance and regulations is formed by the National Climate Change Response White Paper from 2011 and the overarching National Development Plan from 2012 (see sections 2 and 3 below on more details and the Climate Bill recently adopted by Parliament). The main responsible government body for climate change is the Department of Environment, Forestry and Fisheries. They are supported by various bodies such as the inter-ministerial Committee on Climate Change that was established in 2011, the Intergovernmental Committee on Climate Change that also includes representatives from provincial and local governments, the National Climate Change Committee that also includes in non-government stakeholders from business and civil society, and the Presidential Climate Change Coordinating Commission that was established in 2020.

South Africa has a high carbon footprint. The Edgar database shows that per capita GHG emissions in 2022 were 8.91 t CO_{2eq}/yr, which is 32% above the global average in that year. By comparison per capita emissions in the EU27 was 8.15 tCO_{2eq} in 2021 (Grippa M et al, 2023). The latest available GHG inventory shows that South Africa's net emissions decreased marginally between 2000-2020 by about 0.8%. South Africa's net GHG emissions in CO₂ equivalent were 446 million tonnes in 2000 and declined to 442 million tonnes in 2020 (Republic of South Africa, 2022). By far the largest contributor to GHG emissions in South Africa is the power sector. South Africa's economy and energy system is one of the most coal-dependent in the world countries Republic of South Africa (2021) and in 2021 it had the highest carbon intensity among G20 (News 24 Business, 2021). Emissions have slightly decreased in the years 2020 and 2021 as a result of the Covid-19 pandemic but there is no indication this would be other than a temporary development.

The updated NDC includes a commitment to reduce GHG emissions by defining a range for the level of absolute annual GHG emissions for the periods 2021-2025 and 2025-2030. Achieving these emission levels is subject to multilateral support Republic of South Africa (2021). The updated NDC target is more ambitious than the previous NDC, and labelled as one of the more ambitious in the G20. Yet, the target is – as for most of the G20 - still not in line with achieving 1.5°C (Climate Transparency, 2022). The NDC also identifies the long-term vision of net zero emissions by 2050, indicating this will require a radical transformation of its energy, industrial, transport and land-use sectors. GHG mitigation actions in the short term (in the 2020s) are foreseen to focus primarily on the electricity sector, while in the 2030s, a deeper transition will take place in the electricity sector, coupled with a transition in the transport sector towards low emission vehicles, and finally in the 2040s and beyond the decarbonization of the hard-to-mitigate sectors will take place (from NDC).

1.3. Biodiversity and wildlife

South Africa is home to 3 out of the currently 36 recognized biodiversity hotspots; the earth's most biologically rich—yet threatened—terrestrial regions.⁷⁶ These are the Maputaland-Pondoland-Albany Hotspot, the Cape Floristic Region and the Succulent Karoo.

⁷⁶ To qualify as a biodiversity hotspot an area must satisfy two main criteria: (i) contain at least 1,500 unique vascular plants not found anywhere else, (2) have lost at least 70% of its primary native vegetation.

The country has over 95 000 known species of which 905 are on the list of IUCN Red List of Threatened Species.

South Africa ratified the Convention on Biological Diversity (CBD) in 1996 and the Cartagena Protocol in 2003. They also acceded to the Nagoya Protocol in 2014. They are in line with reporting obligations, having submitted the CBD's Sixth National Report in 2018 and the second National Biodiversity Strategy and Action Plan in 2015 (for the period 2015-2025).

UNEP reports that South Africa in total has 1669 protected areas of which 274 qualify under IUCN's Protected Areas Management Evaluation (PAME) framework. There is a remarkable difference in coverage between terrestrial and inland waters on the one hand and marine protected areas on the other hand. For terrestrial areas the coverage is 9.28% of which 6.31% qualifies under PAME, while for marine areas the coverage is 15.5% but only 0.25% qualifying under PAME (UNEP-WCMC, 2023). The NBSAP had set a target to achieve 13.2 % (16 492 882 ha) of land in the conservation estate.

South Africa joined the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) in 1975. The country's national legislation meets the requirements for the Convention's implementation and has so far submitted all annual national reports. The report for 2022, due 31 October 2023, has not yet been submitted. South Africa also ratified the Ramsar Convention on Wetlands and the Conservation of Migratory Species of Wild Animals in 1971. South Africa has 29 Ramsar sites with a total area of all 572,762 hectares.

South Africa for about a third of the total black rhino population on the African continent and is also home to the world's largest population of white rhinos. The country, however, also has a long-term problem with illegal poaching for rhinos. Almost 10,000 rhinos have been lost to poaching in South Africa since the start of this crisis in 2007, leaving fewer than 27,000 rhinos in the world today. Kruger National Park was the location of most poaching until 2022. A combination of additional actions to better protect rhinos, such as anti-poaching efforts, targeted investigations to address internal corruption and wide-scale dehorning, and significant population declines are believed to be the main reason for poaching syndicates to have increasingly shifted to other state, provincial and private reserves (International Rhino Foundation, 2023).

1.4.Natural resources

South Africa has abundant natural mineral resources. In addition to the 35 gold mines in operation the country produces abundant coal, diamonds, iron ore and chromium. Furthermore, South Africa contains the world's largest reserves of manganese and platinum group metals (Miningdigital, 2022). South Africa is the world's top platinum-mining country and a major producer of palladium. It holds the largest-known reserves of PGMs globally at 63 million kilograms (Investingnews, 2023). The mining activities have high environmental impacts. Waste from gold mines constitutes the largest single source of waste and pollution in South Africa. Gold mining waste was estimated to account for 221 million tonnes or 47 % of all mineral waste produced in South Africa, making it the largest, single source of waste and pollution. In addition, there is wide acceptance that water pollution from mining operations is responsible for the most costly environmental and socio-economic impacts (Miningwatch, 2022).

The Department of Mineral Resources and Energy is mandated to ensure the transparent and efficient regulation of South Africa's mineral resources and minerals industry, and the secure and sustainable provision of energy in support of socioeconomic development. The key acts governing their activities include i) the Mineral and Petroleum Resources Development Act (2002), which provides the regulatory framework for equitable access to and the sustainable development of mineral resources and related matters, ii) the Mine

Health and Safety Act (1996), which governs mine health and safety, iii) the National Energy Act (2008), which empowers the minister to plan for and ensure the security of supply for the energy sector, iv) the Petroleum Products Act (1977), which regulates the petroleum industry at the manufacturing, wholesale and retail levels, and v) the Electricity Regulation Act (2006), which establishes a national regulatory framework for the electricity supply industry, including registration and licensing (DMR, 2023).

Forests cover 7.6% of the country, with natural forests covering less than 0.5% of the country. Total forest area has been relatively stable over the last years. FAO reports a total area of 17,196 kha in 2016 and 17,050 kha in 2020, which is a small reduction of 14.18% of total land area 2015 in the year 2016 to 14.08% (FAO, 2020). It is estimated that 37% of natural forest (225 kha) falls within the legally established protected areas, which is 1.31% of total forest area. Natural forests in all State forest land (about 190 kha) and all forestry plantations (public and private) have management plans in South Africa. However, DEFF does not collect data on whether the plan is short, medium and long-term.

South Africa ranks among the top ten of developing countries in terms of commercial plantation development. Total planted commercial forests cover about 1.1% of the country. The South African government has prioritized the expansion of plantations in areas where it is economically, environmentally and socially appropriate to do so. Government aims to have a net increase in afforested land of about 10 000 ha per year in 2020-2030, but afforestation and reforestation occurs in plantations mainly. The NDCs mention just a need for adaptation and mitigation in the forestry sector, among others (FAO, 2020).

1.5. Air quality

Air pollution is a serious threat in South Africa. In 2019 the country ranked 4th in the top 10 countries with the highest number of deaths linked to PM_{2.5} across Africa in research from the US-based Health Effects Institute. As for all other countries analysed, the data for South Africa show a continuous downward trend for the period 2000-2019. Fossil fuel use, specifically the use of coal, liquid oil and natural gas is the main source of emissions: 46.5% of the total ambient PM_{2.5} is linked to use of coal as well as liquid oil and natural gas. When it comes to deaths from indoor air pollution the same research shows a different picture, with South Africa showing a continuous decrease in the percentage of population exposed to household air pollution from 20% in 2010 to around 16% in 2019, which is reportedly the lowest in the whole SADC region. However, while the average concentration of 26.5 µg/m³ meets the least stringent interim target of 35 µg/m³ of the World Health Organization (WHO) Air Quality Guideline, it is still more than 4.5 times the regular targeted PM_{2.5} level of 5 µg/m³ (Health Effects Institute, 2022).

As for other environmental matters, the main governmental body responsible for air quality is DFFE. The main governing Act is the Air Quality Act from 2004, which introduced air quality standards and air quality management plans in South Africa. The Act was updated several times, including the 2014 Amendment Act that among others established the National Air Quality Advisory Committee and added provisions on consequences of unlawful conduct of listed activities resulting in atmospheric emission (Government Gazette, 2014) and the 2020 Amendment Act that updated the emission standards (Government Gazette, 2020). A further amendment to the law is in process in response to a court order. In March 2022 a South African court ordered and ordered the Minister of Environment to enact regulations to improve air quality within 12 months of the judgment. The court issued a landmark judgment declaring that Mpumalanga province's unsafe level of air pollution is in breach of residents' constitutional right to an environment that is not harmful to their health and well-being, along with other constitutional rights (HRW, 2022). One year later, on 17 March 2023, DEFF published Draft Regulations for Implementing and Enforcing Priority Area Air Quality Management Plans for comment. These Regulations set out the requirements necessary for implementing and enforcing any approved priority area Air Quality Management Plans. The Regulations will provide for mandatory implementation of

interventions; mechanisms for government to monitor and evaluate the effectiveness of the plans; transitional arrangements as well as the activation of enforcement measures where non-compliance is identified (Government Gazette, 2023).

South Africa ratified the Vienna Convention and the Montreal Protocol on the reduction and consumption of ozone-depleting substances (ODS) in 1990 and the Kigali Amendment to the Montreal Protocol on the reduction of the consumption and production of hydrofluorocarbons (HFCs) in 2019. South Africa is compliant with the reporting requirements. Data reported to the UNEP Ozone Center for the year 2022 shows that both net ODS and net HCFC consumption have gradually decreased over time. Net HCFC consumption decreased from 144.15 tonnes in 2016 to 73.8 tonnes in 2022 and net ODS consumption from 183.05 tonnes in 2016 to 81.1 tonnes in 2022. With this pace of reduction South Africa seems well on its way to meet the formal deadline to phase out consumption by 2030. The same data reports, show that net HFC consumption has a steep increase from 2018 to 2019. Emissions decreased in the years thereafter, but the emissions of 8 647 454 CO₂eq tonnes in 2022 are still significantly higher than the total reported in 2018 (5 329 096 CO₂eq tonnes). A licensing system is in place for both ODS and HFC, the latter is reported to be established in April 2022 (UNEP, 2023).

1.6. Water

South Africa is considered to be one of the driest countries (per capita), with 98% of its surface water already developed and with a growing water quality problem (6CBD report). The level of water stress has significantly increased over the last years: the percentage of freshwater withdrawal as a proportion of available freshwater resources has been increasing from 40.77 in 2000 to 65.03 in 2020 (FAO, 2022). The issue is being addressed by exports of water from Lesotho to South Africa, with the construction of the Lesotho High Water Project. Currently this project provides 780 million m³/year, following completion of the first part of the project in 2003. Completion of phase 2 of the project, possibly completed by 2027, will bring the total supply up to 1260 million m³/year (LHWP.org, undated).

According to data provided in the NWRS-3 (see details below), the larger part of water (66%) is used in the agricultural sector, of which 61% for irrigation. Households use 27% of total water. Access to clean drinking water is at a relatively high level, certainly when compared to other SADC countries. Unicef reports that in the percentage of population with access to clean drinking water has increased from 92% in 2015 to 94% in 2022 (Unicef, 2023).

The leading government authority is the Department of Water and Sanitation (DWS), which, as defined in the National Water Act of 1998 and the Water Services Act of 1997, is to ensure that the country's water resources are protected, managed, used, developed, conserved and controlled by regulating and supporting the delivery of effective water supply and sanitation. The Water Services Act also established the water boards that are to provide bulk potable and wastewater to water service institutions within their respective service areas. The National Water Act required formulation of a National Water Resources Strategy (NWRS). The purpose of this strategy is to ensure that national water resources are protected, used, developed, conserved, managed and controlled in an efficient and sustainable manner towards achieving South Africa's development priorities in an equitable manner over the next five to 10 years. NWRS-1 was published in 2004, NWRS-2 in 2013 and NWRS-3 was published by DWS on 1 September 2023 (Government Gazette, 2023a).

The NWRS among others defined 19 water management areas (WMA) in each of which a Catchment Management Agency (CMA) would be established to manage the country's water resources. In later years the decision was made to reduce the number of WMAs to nine and NWRS-3 aims to reduce this further to six WMAs. NWRS-3 also addresses the risks of climate change on water supply, storage and demand. Targets and proposed

actions in the NWRS-3 are aligned with South Africa's overall Vision 2030, which among others includes i) promotion of water conservation and water demand management programs to reduce water demand in urban areas to 15% below business-as-usual scenario by 2030, completion of the LHWP Phase 2 by 2026, assessment of several water frameworks and programs, iv) creation of regional water and wastewater utilities, and v) substantial increase in investment in irrigation infrastructure.

Besides the growing concern for increased water stress NWRS-3 identifies further key challenges to water management in South Africa, including: 56% of wastewater treatment works being in a poor or critical condition, 44% of water treatment works being in a poor or critical condition, and more than 50% of the country's wetlands having been lost, and of those that remain, 33% being in poor ecological condition.

1.7. Waste and chemicals

According to the latest available statistics, South Africans generate roughly 122 million tonnes of waste per year. Of this waste, a maximum of only 10% is recycled or recovered for other uses, while at least 90% is landfilled or dumped illegally (Infrastructurenews, 2022). Big volumes of waste were being land-filled -- 92.7% of hazardous waste, and 65% of general waste (PMG, 2022). The government aims to address this by banning certain streams of waste to be landfilled. The Western Cape is already banning 50% of organic waste disposal to landfill in 2022, and there is an upcoming full ban of organic waste to landfill in 2028 (Infrastructurenews, 2022). This will make a significant difference as currently 34.6% of total general waste is organic waste (PMG, 2022).

Challenges to waste management in South Africa include i) only 64.7% of households had access to waste collection services (PMG, 2022), ii) landfills are reaching its maximum capacity quickly (Infrastructurenews, 2022) and iii) are poorly complying to regulations - only 66 out of 299 landfills (22%) that were inspected between 2017/18 and Q1-2020/21 were deemed to be (almost) compliant with regulations (DFFE, 2022).

The main governing act for waste management is the Waste Act from 2008. Waste policies and regulations adopted since the start of the EPA include the Extended Producer Responsibility Regulations, and the National Waste Management Strategy that were adopted in 2020. The latter sets targets for waste management, including the objective to divert 45% of waste from landfill within 5 years through reuse, recycling, recovery and alternative waste treatment (and 55% within 10 years; at least 70% within 15 years leading to Zero-Waste going to landfill). In 2017 the Waste Tyre Regulations were published to ensure environmentally sound management of tyres and prohibiting export of waste tyres without authorisation. In 2021 the Plastic Bag Regulations were amended and national Norms and Standards for Organic Waste Composting were adopted (ERS Basel, 2021). The upcoming ban on landfilling organic waste is resulting in opportunities for industry. Currently there is a large focus on developing alternative organic waste processing such as composting, bioremediation and biogas plants (Infrastructurenews, 2022).

South Africa ratified the Basel Convention on the Control of Transboundary Movements of Hazardous Wastes and Their Disposal in 1994, the Stockholm Convention on Persistent Organic Pollutants (POPs) in 2002 and the Rotterdam Convention on Hazardous Chemicals and Pesticides in International Trade in 2002. In 2016 it also ratified the Ban Amendment to the Basel Convention that is prohibiting all transboundary movements of hazardous wastes which are destined for final disposal operations from OECD to non-OECD States. South Africa is in line with the national reporting obligations under the Basel Convention (latest report on 2021 submitted) and under the Stockholm Convention (latest report on 2022 submitted).

In January 2019 South Africa adopted under its Waste Act the provisions of the Basel Convention but in its latest national report to the convention (on year 2021), the country reports that this legislation does not include provisions to prevent illegal traffic of hazardous and other wastes. South Africa has no restrictions in place on the export of hazardous wastes and other wastes for final disposal. The country requires permitting for export for recovery purposes. In addition, there is export control for waste and scrap of among others, cells, batteries and electric accumulators (ERS Basel, 2021).

South Africa has developed and transmitted its National Implementation Plan (NIP) to the Stockholm convention in 2012. The NIP was updated to address required changes, but transmission is pending. South Africa implemented various national regulations to address the release of chemicals and unintentional POPs, has developed an inventory and an action plan to address release of chemicals (in 2012, updated in 2018).

1.8. Environmental baselines summary

Table 1: Drivers, pressures, impacts and responses across environmental impact areas

Environmental impact area	Drivers	Pressures	State	Impacts	Responses
Climate change	Domestic energy consumption and production, increased demand for transport	Increased GHG emissions	Very high carbon footprint, water stress	Higher temperatures, more frequent droughts and extreme weather events, increased water scarcity	Paris Agreement, Updated NDC with increased targets, adaptation Plan, stepping up implementation of climate policies.
Biodiversity & Wildlife	High mining activities, rhino poaching	Degradation of threatened species, pollution of rivers, air, land	Home to 3 out of the currently 36 globally recognized biodiversity hotspots, 905 threatened species	Loss of ecosystems, biodiversity.	Convention on Biological Diversity, increase in biodiversity management plans, increased anti-poaching measures.
Natural resources	High share GDP from mining, water demand higher than natural inflow	High mineral mining	Rich in minerals, low % natural forest, increase plantation	Increased water stress, increased pollution	Water import, strengthen permitting requirements for mining
Air Quality	High use of fossil fuels	High PM emissions	Poor air quality	Negative effects on human health: high death rate and high costs	Strengthening of air quality standards and air quality management plans
Water	Level of withdrawal higher than inflow, climate change driven droughts	Increased water pollution	Increase in water stress and water pollution	Reduces freshwater resources, higher costs for water, health risk	Strengthening of National Water Resources Strategy, Water import
Waste & Chemicals	Poor compliance to legislation, high illegal dumping	Waste generation, inadequate disposal, weak governance, higher pollution	Linear economy, low recycling	Land and water pollution, emission of toxic gases	waste management legislation and policies, banning landfilling of certain waste streams

2. IMPACT SCREENING AND SCOPING

The impact screening shows that focus of addressing environmental challenges lies in the areas of reducing greenhouse gas emissions in the power sector.

Total greenhouse gas emissions from the energy sector for 2020 were estimated to be 379 505 Gg CO₂e which is 81.0% of the total emissions (excl. FOLU) for South Africa. 62.4%

of these emissions come from energy industries, followed by transport (12.7%) and manufacturing industries and construction (8.8%) (Republic of South Africa, 2022).

In recent years South Africa stepped up its policies to address its GHG emissions, especially in the power sector. The Carbon Tax Act of 2019 came into effect on 1 June 2019. The current tax rates, however, are low and high industry-specific tax-free emission allowances are granted, resulting in low net tax rates, especially in comparison with global averages that are in the order of 20-40 USD/tCO_{2e}. The South African tax rates have increased from an initial R120/tCO_{2e} to R159/tCO_{2e} for the 2023 calendar year (approx. 8-9 USD/tCO_{2e}). The industry-specific tax-free emission allowances range from 60% to 95% (SARS, 2023). In the Budget 2022 the government extended the first phase of its Carbon Tax programme by three years to December 31, 2025, which means that the transitional support measures such as the tax-free allowances and revenue-recycling measures, will continue for a few more years. For the period thereafter, the government also announced plans for a steady increase of the tax rate to reach USD 20/tCO_{2e} by 2026, USD 30/tCO_{2e} by 2030 and USD 120/tCO_{2e} by 2050 (Engineeringnews, 2022).

The government also has high ambitions for renewable energy. Whereas its main support policy, the Renewable Energy Independent Power Producer Procurement Programme (REIPPPP) from 2010-2022 had only resulted in six bid windows that added 6.2 GW of installed capacity to the grid (5% of the country's electricity supply), the Minister announced in April 2023 that the next window would be 15 GW (Daily Maverick, 2023). This should help achieve the target of about 30 GW of new generation capacity by 2030 as set in the 2019 Integrated Resource Plan and which most should be from renewables and only 500 MW from coal (Republic of South Africa, 2019). The country also receives international support to decarbonise its energy sector. At the COP26 a partnership between Germany, the UK, the US, France and the EU announced that they would provide \$8.5bn of support to South Africa to phase out coal (Argus, 2021).

Despite these efforts the government seems to be having a hard time to make the required progress in phasing out coal-based electricity production. Various news sites quote the Minister of Electricity Mr Ramokgopa saying "Renewables on their own will not be able to sustain the economy. They are still relying on the redundancy of thermal, nuclear, and hydro for them to be able to give us the kind of potential that is possible." The same minister acknowledges the poor performance of the coal fleet and its contribution to rolling blackouts, saying that on average the efficiency of the thermal plants is about 51% and that the 81 units that are with Eskom are highly unreliable. Reasons for this, says the minister, include the lack of maintenance over a period of time, as a result of the Eskom balance sheet having been severely constrained which resulted in the company being unable to make the necessary investment (Daily Maverick, 2023 and AEC, 2023).

Eskom's coal plants are also reported to breach several emission limits and have significant health impacts. Eskom's planned retirement schedule and emission control retrofits are estimated to cause 79,500 air pollution-related deaths from 2025 until end-of-life and compliance with South Africa's Minimum Emissions Standards (MES) for combustion installations would avoid a projected 34,400 deaths. The research also notes that in comparison to best international practice, the MES are highly lenient. The EU SO₂ limits, for example, are less than one tenth of the limit value in South Africa (CERA, 2023).

On 7 November 2022, at the COP27, South Africa launched South Africa's Just Energy Transition (JET) Investment Plan. The plan aims to accelerate the decarbonisation of South Africa's economy and achieve the NDC targets. It covers three priority sectors – the energy sector as well as, electric vehicles and green hydrogen – for finance. The plan requires \$98 billion over five years to begin South Africa's 20 year energy transition. The International Partner Group of the UK, France, Germany, the US and the EU is mobilising an initial \$8.5 billion to catalyse the first phase of the programme. This funding will be geared towards coal plant de-commissioning; funding alternative employment in coal mining areas, and

investments to facilitate accelerated deployment of renewable energy and investments in new sectors of the green economy (European Commission, 2022).

The EU support to South Africa's decarbonisation seems to contrast with the recent increase of EU coal imports from South Africa. The increase of coal exports from South Africa to the EU was 720% during the first half of 2022 compared to the previous year (Reuters, 2022 and IEA, 2022). The steep increase was an effect of the EU's a ban on coal imports from Russia as part of sanctions for its invasion of Ukraine. This is assumed to be a temporary effect and not to have any relation to the EPA.

The results of the CGE modelling undertaken by DG Trade suggest that changes in trade due to the EPA have had negligible scale effects in total CO₂ emissions, with an increase of 0.00006% in scenario A and 0.000022% in scenario B. The only significant absolute changes visible in both scenarios are in electricity (-0.092 million tCO₂ in scenario A and -0.231 million tCO₂ in scenario B), oil products (+0.051 million tCO₂ in scenario A and +0.177 million tCO₂ in scenario B) and land transport (+0.021 million tCO₂ in scenario A and +0.101 million tCO₂ in scenario B). In addition cement shows a significant absolute decrease in CO₂ emissions in scenario B (-0.109 million tCO₂). This all has to do with the relative high use of coal in energy production in South Africa.

When looking at in CO₂ emission data in relative terms some structural impacts are visible. The most significant relative change in CO₂ emissions is for motor vehicles and parts (+2.37% in scenario A and +14.30% in scenario B). This seems to be the result of South Africa taking over part of exports to the EU from the other EPA SADC States. Both scenarios also show a relative increase in CO₂ emissions from their transport equipment (+1.02% in scenario A and + 1.99% in scenario B). In scenario A, the highest relative decrease in CO₂ emissions is in wearing (-2.78%) and leather (-1.39%) while in scenario B this is in Rubber and plastics products (-3.00%), other meat (-2.94%) and wearing (-2.83%).

3. ANALYSIS OF ENVIRONMENTAL IMPACTS THROUGH THE AGREEMENT

The EU-SADC EPA was signed in June 2016. Since then South Africa made significant steps forward in addressing climate change. This is especially observed in 2021, when the Republic published their updated NDC with more ambitious targets, and submitted the first National Adaptation Plan. Also in 2023 the republic is strengthening its efforts, by announcing a new bid window to the REIPPPP that should add 15 GW of renewable energy, half of the targeted amount by 2030. There is however no evidence that environmental developments are linked to the EPA and literature review rather suggests that this was spurred by other circumstances such as an aggravating energy crisis that increased the need for IPPs in the power market and the realisation that the effects of climate change are increasing existing problems such as poverty, inequality and unemployment. Floods and droughts are impacting agricultural production and food security, falling most heavily on the poorer population on those living under conditions of poverty (Republic of South Africa, 2020).

The NDC provides an assessment of the main drivers for the revisions and enhancements in the NDC compared to the earlier version, indicating that improved information on climate change impacts and the costs on the one hand, and a reduction in economic growth and GHG intensity on the other hand are the main drivers. The NDC concludes that the reduction of the GHG intensity shows the start of the process of relative decoupling economic growth from GHG emissions, with increased energy efficiency, higher renewable energy and a shift in economic growth to less energy-intensive sectors as the root causes and plans to build on this by plans to capitalise on the national and global shift to the green economy, through green industrialisation and by creating new opportunities for South Africa's rich mineral endowment (Republic of South Africa, 2021).

A key milestone for addressing climate change could be the adoption of the Climate Change Bill which forms the first legal framework in South Africa to respond to the impacts of climate change. The Bill was recently adopted by Parliament sent to the National Council of Provinces for concurrence (Parliament of the Republic of South Africa, 2023). The Bill provides a governance framework to address climate change, and introduces a series of specific measures for both climate change mitigation and adaptation (Republic of South Africa, 2022a). In addition the Bill requires the minister responsible for the environment to assign carbon budgets to companies to limit their carbon emissions. (Parliament of the Republic of South Africa, 2023). A first version of the Bill was published for public comment in June 2018. In 2021 an updated version was presented and adopted by Cabinet in September 2021. In February 2022 it was submitted to Parliament and in October 2023 the Parliament passed the Bill. Some of the key elements of the law were, however, already implemented such as formulating the National Adaptation Plan and establishing a Presidential Climate Commission that advise government and to monitor the progress towards reaching the climate goals.

The economic analysis provides some indication that there could be some scale effects as well as structural effects from the EPA on GHG emission levels. The analysis concluded that EU imports from South Africa were significantly higher in the EPA period (2017-2022) compared to the preceding years (2013-2018) and that the structure of imports changed, with an rapid increase in imports in vehicles and a reduction of imports from textiles and electronics. Looking at the trend in greenhouse gas emissions in Africa and the available data at sectoral level there, however, the developments do not seem to be sufficiently significant to conclude that such scale effects or structural effects can be clearly linked to the EPA. The analysis on the emission levels from electricity production, the state of Eskom's coal production facilities and the non-compliance to emission standards indicate that there is good potential for product effects, but these have, however, not yet taken place.

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APPENDIX E: DETAILED ANALYSES RELATED TO THE IMPACT OF THE EPA ON HUMAN RIGHTS

Appendix E1: Human rights baseline analysis

This appendix presents a baseline analysis of the international human rights obligations in the States-Parties to the SADC EPA and the situation regarding human rights in these states prior to the application of the Agreement (Step 1).⁷⁷ The findings from this step aid the impact assessment in Steps 2 and 3 and are further elaborated in the detailed analysis with respect to the assessment of specific rights.

Human rights are defined as set out in the core UN human rights treaties, the Charter of Fundamental Rights of the European Union, the European Convention on Human Rights, the African Charter on Human and Peoples' Rights (ACHPR), the Protocol to the ACHPR on the Rights of Women in Africa, the Protocol to the ACHPR on the Rights of Persons with Disabilities, the African Charter on the Rights and Welfare of the Child, and relevant ILO fundamental conventions.

4. INTERNATIONAL HUMAN RIGHTS OBLIGATIONS OF THE EU MEMBER STATES AND THE SADC EPA STATES

4.1. UN Conventions

The United Nations Office of the High Commissioner for Human Rights (OHCHR) specifies nine core international human rights treaties. Some of the treaties also have optional protocols that deal with specific concerns related to the treaty. In total, there are nine core international human rights treaties and nine optional protocols to some of these treaties.⁷⁸ States ratify or accede to these treaties and their optional protocols on a voluntary basis. By becoming parties to the international human rights treaties, States accept obligations under these treaties and the duty to ensure their effective implementation. Next to that, States have to meet their reporting obligation under the treaty they ratify by periodically submitting reports to a specific United Nations treaty body regarding progress that has been made in the implementation of the provisions of that treaty. Each treaty body is composed of independent experts that monitor implementation of a certain convention and present their findings in periodic reports for each State-Party.

This section presents a concise overview of the ratification status of the international human rights treaties by EU Member States and the SADC-EPA partner states and informs whether these states meet their reporting obligations under these treaties.

European Union

EU Member States have different records with respect to ratification of international human rights treaties (see Table 1). Overall, EU states have ratified most of the core international

⁷⁷ In line with the EC Guidelines on the Analysis of Human Rights Impacts in Impact Assessments for Trade-Related Policy Initiatives, in this analysis we define "human rights" as also fundamental rights enshrined in the Charter of fundamental Rights of the EU.

⁷⁸ Core UN human rights treaties include: International Convention on the Elimination of All Forms of Racial Discrimination (ICERD), International Covenant on Civil and Political Rights (ICCPR), International Covenant on Economic, Social, and Cultural Rights (ICESCR), Convention on the Elimination of All Forms of Discrimination against Women (CEDAW), Convention against Torture and Other Cruel, Inhuman or Degrading Treatment or Punishment (CAT), Convention on the Rights of the Child (CRC), International Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families (ICMW), International Convention for the Protection of All Persons from Enforced Disappearance (ICPED), International Convention on the Rights of Persons with Disabilities (ICRPD), and their Optional Protocols.

human rights instruments. However, none of the member states ratified the International Convention on the Rights of All Migrant Workers and Members of Their Families (ICMW), and few member states ratified the Optional Protocol to the International Covenant on Economic, Social and Cultural Rights (ICESCR).

As part of their reporting obligations, all EU States regularly report to the UN monitoring treaty bodies. Belgium, Bulgaria, Denmark, Finland, France, Italy, Lithuania, and Luxembourg do not have any overdue reports. Malta, Hungary, and Austria have one or more report that are overdue for longer than five years. Malta and Croatia have the highest number of overdue reports, six and five reports respectively.⁷⁹

Table 1: Ratification status of core international human rights treaties by the EU MS and EU-SADC EPA states

Treaty ⁸⁰	Botswana	Lesotho	Namibia	Mozambique	South Africa	Eswatini	Austria	Belgium	Bulgaria	Cyprus	Croatia	Czech Rep.	Denmark	Estonia	Finland	France	Germany	Greece	Hungary	Ireland	Italy	Latvia	Lithuania	Luxembourg	Malta	Netherlands	Poland	Portugal	Romania	Slovakia	Slovenia	Spain	Sweden
CAT	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
OP-CAT	✗	✗	✗	✓	✓	✗	✓	S	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	S	✓	✗	✓	✓	✓	✓	✓	✓	✓	S	✓	✓	✓
ICCPR	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
ICCPR-OP1	✗	✓	✓	✗	✗	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
ICCPR-OP2	✗	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
CPED	✗	✓	✗	S	✗	S	✓	✓	S	S	S	✓	S	✗	S	✓	✓	✓	✗	S	✓	✗	✓	S	✓	✓	S	✓	S	✓	S	✓	S
CEDAW	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
OP-CEDAW	✓	✓	✓	✓	✓	✗	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
ICERD	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
ICESCR	✗	✗	✓	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
ICESCR-OP	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	S	✓	✗	✗	✓	✗	S	✗	✓	✗	✓	S	✓	✗
ICMW	✗	✓	✗	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗
CRC	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
OP-CRC-AC	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
OP-CRC-SC	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	S	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
OP-CRC-IC	✗	✗	✗	✗	✗	✗	S	✓	✗	✓	✓	✓	✓	✗	✓	✓	✓	✗	✗	✓	✓	✗	S	✓	S	✗	S	✓	S	✓	✓	✓	✗
CRPD	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
OP-CRPD	✗	✗	✓	✓	✓	✓	✓	✓	S	✓	✓	S	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✓	S	✓	✓	✓	✓

* (✓) state party, (S) signatory party, (✗) no action.

Source: Study team compilation based on OHCHR dashboard (indicators.ohchr.org)

Botswana

Botswana has ratified six out of nine core UN human rights treaties and three out of nine Optional Protocols. Botswana did not ratify the International Covenant on Economic, Social and Cultural Rights (ICESCR), the International Convention for the Protection of All Persons from Enforced Disappearance (CPED), and the International Convention on the Protection

⁷⁹ UN Treaty Body Database: https://tbinternet.ohchr.org/_layouts/15/TreatyBodyExternal/LateReporting.aspx

⁸⁰ CAT: Convention against Torture and Other Cruel Inhuman or Degrading Treatment or Punishment; OP-CAT: Optional Protocol to the Convention against Torture and Other Cruel Inhuman or Degrading Treatment or Punishment; ICCPR: International Covenant on Civil and Political Rights; ICCPR-OP1: Optional Protocol to the International Covenant on Civil and Political Rights; ICCPR-OP2: 2nd Protocol to the International Covenant on Civil and Political Rights; CPED: International Convention for the Protection of All Persons from Enforced Disappearance; CEDAW: International Convention on the Elimination of All Forms of Discrimination against Women; OP-CEDAW: Optional Protocol to the Convention on the Elimination of All Forms of Discrimination against Women; ICERD: International Convention on the Elimination of All Forms of Racial Discrimination; ICESCR: International Covenant on Economic, Social and Cultural Rights; ICESCR-OP: Optional Protocol to the Covenant on Economic, Social and Cultural Rights; ICMW: International Convention on the Protection of the Rights of All Migrant Workers and Members of their Families; CRC: Convention on the Rights of the Child; OP-CRC-AC: Optional Protocol to the Convention on the Rights of the Child on the involvement of children in armed conflict; OP-CRC-SC: Optional Protocol to the Convention on the Rights of the Child on the sale of children, child prostitution and child pornography; OP-CRC-IC: Optional Protocol to the Convention on the Rights of the Child on a communications procedure; CRPD: Convention on the Rights of Persons with Disabilities; OP-CRPD: Optional Protocol of the Convention on the Rights of Persons with Disabilities.

of the Rights of All Migrant Workers and Members of their Families (ICMW) (see Table 1). The Convention on the Rights of Persons with Disabilities (CRPD) was ratified in 2021.

As part of its reporting obligations, Botswana has three overdue reports (under the Convention on the Eradication of All Forms of Discrimination against Women and two optional protocols to the Convention on the Rights of the Child).⁸¹

Eswatini

Eswatini has ratified seven out of nine core international human rights treaties and three out of nine Optional Protocols. Eswatini did not ratify the ICMW and is a signatory party to the CPED but has not ratified it yet. Regarding the Optional Protocols, Eswatini ratified the Optional Protocol to the CRPD and two Optional Protocols to the CRC (see Table 1). The most recent ratifications took place in 2012, when Eswatini ratified the CRPD, its Optional Protocol, and two Optional Protocols to the CRC.

Regarding its reporting obligations, Eswatini has six reports that are pending submission to the Committee on the Rights of the Child (under both Optional Protocols to the CRC), the Torture Committee, the Committee on the Elimination of All Forms of Discrimination against Women, the Committee on the Economic, Social and Cultural Rights, and the Committee on the Elimination of All Forms of Racial Discrimination.⁸²

Lesotho

Lesotho has ratified nine out of nine core UN human rights treaties and four out of nine Optional Protocols. Lesotho did not ratify the Second Optional Protocol to the International Covenant on Civil and Political Rights (ICCPR), the Optional Protocol to the ICESCR, the Protocol to the Torture Convention, the Protocol to the CRPD, and the Protocol to the CRC on a communication procedure (see Table 1). The most recent ratification took place in 2013, when Lesotho ratified the International Convention for the Protection of All Persons from Enforced Disappearance (CPED).

Regarding its reporting obligations, Lesotho has been late in submitting its reports to several UN monitoring bodies. So far, nine reports are pending submission, with six out of nine being overdue for more than 10 years (i.e. reports under the CAT, the CERD, the CESCR, the CRPD, and two Optional Protocols to the CRC).⁸³

Mozambique

Mozambique has ratified seven out of nine core UN human rights treaties and six out of nine Optional Protocols. Mozambique did not ratify the ICESCR and is a signatory party to the International Convention for the Protection of All Persons from Enforced Disappearance (CPED) but has not ratified it yet. Regarding the Optional Protocols, Mozambique did not ratify the First Optional Protocol to the ICCPR, the Optional Protocol to the ICESCR, and the Optional Protocol to the CRC on a communication procedure (see Table 1). The most recent ratification took place in 2014, when Mozambique ratified the Optional Protocol to the Torture Convention.

Regarding its reporting obligations, Mozambique has five overdue reports (under the CAT, the ICCPR, the CERD and two Optional Protocols to the CRC).⁸⁴

⁸¹ https://tbinternet.ohchr.org/_layouts/15/TreatyBodyExternal/LateReporting.aspx

⁸² UN Treaty Body Database: https://tbinternet.ohchr.org/_layouts/15/TreatyBodyExternal/LateReporting.aspx

⁸³ UN Treaty Body Database: https://tbinternet.ohchr.org/_layouts/15/TreatyBodyExternal/LateReporting.aspx

⁸⁴ https://tbinternet.ohchr.org/_layouts/15/TreatyBodyExternal/LateReporting.aspx

Namibia

Namibia has ratified seven out of nine core international human rights treaties and six out of nine Optional Protocols. Namibia did not ratify the ICMW, the CPED, the Optional Protocol to the Torture Convention, the Optional Protocol to the ICESCR, and the Optional Protocol to the CRC on a communication procedure (see Table 1). The most recent ratification took place in 2007, when Namibia ratified the Convention on the Rights of Persons with Disabilities (CRPD) and its Optional Protocol.

Regarding its reporting obligations, Namibia has two overdue reports to the Committee on the Rights of the Child under the Optional Protocols to the CRC, which are pending submission since 2004.⁸⁵

South Africa

South Africa has ratified seven out of nine core international human rights treaties and seven out of nine Optional Protocols. South Africa did not ratify the ICMW, the CPED, the Optional Protocol to the ICESCR, and the Optional Protocol to the CRC on a communication procedure (see Table 1). The most recent ratification took place in 2019, when South Africa ratified the Optional Protocol to the Torture Convention.

Regarding its reporting obligations, South Africa has been late in submitting its reports to the Committee on the Rights of the Child (one report under the CRC and one report under the Optional Protocol to the CRC on the involvement of children in armed conflict), Torture Committee, and the Committee on the Rights of Persons with Disabilities. Most reports are pending since 2022 and 2023 (except for the report under the Optional Protocol to the CRC, which is pending submission since 2011).⁸⁶

4.2.ILO Conventions

The International Labour Organization (ILO) identified ten fundamental conventions and one Protocol (eleven instruments in total) that cover fundamental principles and rights at work: freedom of association and the effective recognition of the right to collective bargaining, the elimination of all forms of forced or compulsory labour, effective abolition of child labour, the elimination of discrimination in respect of employment and occupation, and a safe and healthy working environment (ILO, 1998; ILO, 2022).⁸⁷ Apart from the fundamental ILO Conventions, we also look at the ratification of the Convention No. 169 on the protection of indigenous peoples' rights, that may be relevant for this analysis. States ratify ILO conventions on a voluntary basis. After ratification, states undertake to apply conventions they ratify in national law and practice. As for the UN Conventions, states also need to report on the application of the ILO Conventions at regular periods of time.

European Union

All EU Member States ratified the eight initial fundamental ILO conventions. Since the list of the ILO fundamental Conventions has been extended to eleven instruments in 2022, some EU Member States yet have to ratify both conventions regarding occupational safety

⁸⁵ UN Treaty Body Database: https://tbinternet.ohchr.org/_layouts/15/TreatyBodyExternal/LateReporting.aspx

⁸⁶ UN Treaty Body Database: https://tbinternet.ohchr.org/_layouts/15/TreatyBodyExternal/LateReporting.aspx

⁸⁷ ILO fundamental conventions include: Forced Labour Convention, 1930 (No. 29), Protocol to the Forced Labour Convention, 2014 (P029), Freedom of Association and Protection of the Right to Organise Convention, 1948 (No. 87), Right to Organise and Collective Bargaining Convention, 1949 (No. 98), Equal Remuneration Convention, 1951 (No. 100), Abolition of Forced Labour Convention, 1957 (No. 105), Discrimination (Employment and Occupation) Convention, 1958 (No. 111), Minimum Age Convention, 1973 (No. 138), Worst Forms of Child Labour Convention, 1989 (No. 182), Occupational Safety and Health Convention, 1981 (No. 155), Promotional Framework for Occupational Safety and Health Convention, 2006 (No. 187).

and health (No. 155 & 187) and the Protocol to the Forced Labour Convention (P029) (see Table 2).

Table 2: Ratification status of ILO fundamental conventions by EU Member States and EU-SADC EPA states

Treaty ⁸⁸	Botswana	Lesotho	Mozambique	Namibia	South Africa	Eswatini	Austria	Belgium	Bulgaria	Cyprus	Croatia	Czech Rep.	Denmark	Estonia	Finland	France	Germany	Greece	Hungary	Ireland	Italy	Latvia	Lithuania	Luxembourg	Malta	Netherlands	Poland	Portugal	Romania	Slovakia	Slovenia	Spain	Sweden
C029	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
C087	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
C098	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
C100	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
C105	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
C111	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
C138	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
C182	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
C155	✗	✓	✗	✗	✓	✗	✗	✗	✗	✓	✓	✓	✓	✗	✓	✗	✗	✗	✓	✓	✗	✓	✗	✗	✗	✓	✗	✗	✗	✗	✓	✓	
C187	✗	✓	✗	✗	✗	✗	✓	✓	✗	✗	✗	✓	✗	✗	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✓	✓
P029	✗	✓	✓	✗	✗	✓	✓	✓	✗	✓	✗	✗	✓	✓	✓	✓	✓	✗	✗	✗	✓	✗	✓	✓	✓	✗	✗	✓	✗	✗	✗	✗	✓
C169	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✓	✗	✗	✗	✓	✗	✗	✗	✗	✗	✗	✓	✗	✓	✗	✗	✗	✗	✗	✓	✗

* (✓) ratified; (✗) no action.

Source: Study team compilation based on ILO NORMLEX – Information System on International Labour Standards (www.ilo.org)

Botswana

Botswana has ratified eight out of ten fundamental ILO Conventions that cover forced labour, discrimination, child labour, and the right to collective bargaining. It did not ratify conventions related to occupational safety and health (No. 155 and No. 187). It did also not ratify the Protocol of 2014 to the Forced Labour Convention (P029).

Eswatini

Eswatini has ratified eight out of ten fundamental ILO Conventions that cover forced labour, discrimination, child labour, and the right to collective bargaining. It did not ratify conventions related to occupational safety and health (No. 155 and No. 187). It did also not ratify the Protocol of 2014 to the Forced Labour Convention (P029).

Lesotho

Lesotho has ratified ten out of ten fundamental ILO Conventions that cover forced labour, discrimination, child labour, the right to collective bargaining, and safety and health at work. Convention No. 187 was ratified on 15 March 2023 and will enter into force for Lesotho on 15 March 2024. Lesotho also ratified the Protocol of 2014 to the Forced Labour Convention (P029).

Mozambique

Mozambique has ratified eight out of ten fundamental ILO Conventions that cover forced labour, discrimination, child labour, and the right to collective bargaining. It did not ratify

⁸⁸ Fundamental ILO Conventions: C029: Forced Labour Convention, 1930; C087: Freedom of Association and Protection of the Right to Organise Convention, 1948; C098: Right to Organise and Collective Bargaining Convention, 1949; C100: Equal Remuneration Convention, 1951; C105: Abolition of Forced Labour Convention, 1957; C111: Discrimination (Employment and Occupation) Convention, 1958 ; C138: Minimum Age Convention, 1973; C182: Worst Forms of Child Labour Convention, 1999; C155: Occupational Safety and Health Convention, 1981; C187: Promotional Framework for Occupational Safety and Health Convention, 2006; P029: Protocol to the Forced Labour Convention, 2014.

conventions related to occupational safety and health (No. 155 and No. 187). It ratified the Protocol of 2014 to the Forced Labour Convention (P029).

Namibia

Namibia has ratified eight out of ten fundamental ILO Conventions that cover forced labour, discrimination, child labour, and the right to collective bargaining. It did not ratify conventions related to occupational safety and health (No. 155 and No. 187). It ratified the Protocol of 2014 to the Forced Labour Convention (P029).

South Africa

South Africa has ratified nine out of ten fundamental ILO Conventions that cover forced labour, discrimination, child labour, the right to collective bargaining, and safety and health at work. It did not ratify one convention related to occupational safety and health (No. 187). It did also not ratify the Protocol of 2014 to the Forced Labour Convention (P029).

Only five EU Member States and none of the EU-SADC EPA States ratified Convention No. 169 on the rights of indigenous peoples (see Table 2).

4.3. Regional Instruments

While UN and ILO Conventions ensure protection of human rights at the international level (any state can become a party to these conventions), regional human right instruments are restricted to states in a particular geographic region.

The main European regional human rights instruments include the Charter of Fundamental Rights of the European Union, the European Convention on Human Rights (ECHR), All Protocols to the ECHR, the European Social Charter, the European Convention for the Prevention of Torture and inhuman or Degrading Treatment or Punishment. The European Court of Human Rights has jurisdiction to decide complaints submitted by individuals and States concerning the violations of the European Convention on Human Rights allegedly committed by a State party to the Convention.

The African regional human rights system has been established by the African Union. The main regional human rights instruments in Africa include the African Charter on Human and Peoples' Rights (the Banjul Charter), several protocols to the Charter, the African Convention on Human and Peoples' Rights, the African Charter on the Rights and Welfare of the Child. The African Court on Human and Peoples' Rights has jurisdiction over cases and disputes that concern the interpretation and application of the African Charter and other relevant human rights instruments and may adjudicate a human rights claim against a member state of the African Union, if it has ratified the 1998 Protocol to the Charter on the establishment of the court and explicitly consented to the Court's jurisdiction.

All EU Member States ratified regional human rights instruments. The Ratification status of relevant regional human rights treaties by EU-SADC EPA States is presented in Table 3.

Table 3: Ratification status of regional human rights instruments by EU-SADC EPA states

Treaty ⁸⁹	Botswana	Lesotho	Mozambique	Namibia	South Africa	Eswatini
African Charter on Human and Peoples' Rights	✓	✓	✓	✓	✓	✓
Protocol to the ACHPR on the Rights of Older Persons	✗	✓	✓	✗	✗	✗
Protocol to the ACHPR on the Rights of Persons with Disabilities in Africa	✗	✗	✓	✗	✓	✗
Maputo Protocol	✗	✓	✓	✓	✓	✓
Protocol to the ACHPR on the Rights of Citizens to Social Protection and Social Security	✗	✗	✗	✗	✗	✗
Kampala Convention	✗	✓	✓	S	✗	✓
African Charter on the Rights and Welfare of the Child	✓	✓	✓	✓	✓	✓
African Youth Charter	✗	✓	✓	✓	✓	✓
OAU Convention Governing the Specific Aspects of Refugee Problems in Africa	✓	✓	✓	S	✓	✓
African Charter on Democracy, Elections and Governance	✗	✓	✓	✓	✓	S
1998 Protocol to the ACHPR on the Establishment of an African Court on Human and Peoples' Rights	S	✓	✓	S	✓	S

* (✓) state party, (S) signatory party, (✗) no action

Source: Study team compilation based on data on the website of the African Union: <https://au.int/en/treaties>

5. HUMAN RIGHTS PROFILES OF THE EU AND EU-SADC EPA STATES

Human rights profiles present a short overview of the human rights situation before the EU-SADC EPA came into force (before 2016), marking overall human rights national framework and major pre-existing conditions of stress or vulnerability, with a focus on vulnerable population groups. Baseline analysis is developed further at the next stages of the project with respect to specific rights that are likely to have been affected by the Agreement. The profiles are based on the review of various reports of the UN human Rights treaty bodies, reports of the Universal Periodic Review (UPR), reports of the UN Special Rapporteurs on various topics, EU Annual Reports of Human Rights and Democracy, reports of international and local human rights organisations, civil society reports, and other relevant sources.

5.1. European Union

Human rights framework

According to Article 2 of the Treaty of the European Union: "The Union is founded on the values of respect for human dignity, freedom, democracy, equality, the rule of law and respect for human rights". Human rights are placed at the centre of the EU agenda in both its internal and external relations (Article 3(5) and Article 21) of the Treaty of the European Union. The EU Member States are bound by the human rights values enshrined in the Charter of the Fundamental Rights of the European Union, which covers a wide range of rights as enshrined in the Universal Declaration of Human Rights and represents a comprehensive instrument in the protection and promotion of human rights and fundamental freedoms. The Charter applies jointly with other national and international human rights systems, and each EU member state has international human rights

⁸⁹ Fundamental ILO Conventions: C029: Forced Labour Convention, 1930; C087: Freedom of Association and Protection of the Right to Organise Convention, 1948; C098: Right to Organise and Collective Bargaining Convention, 1949; C100: Equal Remuneration Convention, 1951; C105: Abolition of Forced Labour Convention, 1957; C111: Discrimination (Employment and Occupation) Convention, 1958 ; C138: Minimum Age Convention, 1973; C182: Worst Forms of Child Labour Convention, 1999; C155: Occupational Safety and Health Convention, 1981; C187: Promotional Framework for Occupational Safety and Health Convention, 2006; P029: Protocol to the Forced Labour Convention, 2014.

obligations. Next to that, EU law provides a comprehensive legal framework that addresses protection of various human rights through various directives.

The Strategic Framework on Human Rights and Democracy was adopted by the European Council in 2012 accompanied by an action plan in order to implement the framework. The third EU Action Plan on Human Rights and Democracy was adopted in 2020 for the period of 2020-2024. It sets out priorities of the EU for five main areas of action: (1) protecting and empowering individuals, (2) building resilient, inclusive, and democratic societies, (3) promoting a global system for human rights and democracy, (4) new technologies: harnessing opportunities and addressing challenges, (5) delivering by working together (EEAS, 2020).

Each member state has a national human rights institution (NHRI). Almost all these institutions fully meet the Paris Principles (“Principles Relating to the Status of National Human Rights Institutions”), which set out the minimum standards for their credibility, independence, and effective operation (see Table 4 for a full overview).

Table 4: List of EU MS NHRIs and their accreditation status

EU Member State	Name of the NHRI	Accreditation status ⁹⁰
Austria	Austrian Ombudsman (AOB)	A-status
Belgium	Federal Institute for the Protection and Promotion of Human Rights (FIRM)	Applied for accreditation
Belgium	Interfederal Centre for Equal Opportunity and the fight against racism and discrimination	B-status
Bulgaria	Commission for Protection against Discrimination	B-status
Bulgaria	Ombudsman of the Republic of Bulgaria	A-status
Croatia	Ombudswoman of the Republic of Croatia	A-status
Cyprus	Commissioner for Administration and Protection of Human Rights	B-status
Czech Republic	Public Defender of Rights	Not accredited
Denmark	Danish Institute for Human Rights	A-status
Estonia	Chancellor of Justice of Estonia	A-status
Finland	Finnish Human Rights Centre	A-status
Finland	Parliamentary Ombudsman	A-status
France	French National Consultative Commission on Human Rights	A-status
Germany	German Institute for Human Rights	A-status
Greece	Greek National Commission for Human Rights	A-status
Hungary	Office of the Commissioner for Fundamental Rights	B-status
Ireland	Irish Human Rights and Equality Commission	A-status
Italy	National Guarantor for the Rights of Persons Detained or Deprived of Liberty	Not accredited
Latvia	Ombudsman’s Office of the Republic of Latvia	A-status
Lithuania	Seimas Ombudsmen’s Office	A-status
Luxembourg	Consultative Human Rights Commission of Luxembourg	A-status
Malta	Human Rights and Equality Commission	Not accredited
Netherlands	Netherlands Institute for Human Rights	A-status
Poland	Commissioner for Human Rights	A-status
Portugal	Portuguese Ombudsman	A-status
Romania	People’s Advocate	Applied for accreditation
Romania	Romanian Institute for Human Rights	Applied for accreditation
Slovakia	Slovak National Centre for Human Rights	B-status
Slovenia	The Human Rights Ombudsman of the Republic of Slovenia	A-status
Spain	Ombudsman of Spain	A-status
Sweden	Swedish National Institute for Human Rights	Not accredited
Sweden	Equality Ombudsman	B-status

Source: FRA, 2022.

⁹⁰ National Human Rights Institutions that are evaluated as fully compliant with the Paris Principles are accredited with “A status”, and those that are evaluated as partially compliant are accredited with “B status”.

Implementation issues

While EU Member States have not followed homogenous development paths before becoming Members of the EU, some states have more human rights issues than others. In the period from 2011 until 2016, most EU Member States struggled to develop an effective response to the increased flow of migrants and asylum seekers, which affected their rights and access to basic needs (Human Rights Watch, 2016; 2017). Apart from that, regular reports were issued regarding discrimination against LGBTI people, Roma people, women.⁹¹ Discrimination against people with disabilities, national minorities, migrants have also been on the agenda of the Council of Europe’s Commissioner for Human rights in 2017. The 2016 European Union Agency for Fundamental Rights (FRA) report outlined concerns about Roma integration, privacy and data protection, and the rights of the child in the EU (FRA, 2016).

5.2. Botswana*Human rights framework*

The Constitution of Botswana provides the legal foundation for human rights protection in the country. Chapter II of the Constitution refers to protection of fundamental rights and freedoms of individuals and guarantees such rights as the right to life, right to personal liberty, fundamental freedoms, freedom from discrimination, prohibition of slavery and forced labour, prohibition of torture. In the 2013 submission to the United Nations Universal Periodic Review (UPR), stakeholders noted that the Constitution did not include protection of indigenous peoples and collective tribes (United Nations, 2013; 2013a). Moreover, the 2013 UPR report on Botswana stated that several UN Conventions that Botswana was party to (CAT, CEDAW, ICCPR, CERD) were not incorporated in its legal system to make them directly applicable before courts and administrative authorities in the country.

Next to constitutional guarantees, Botswana has enacted various laws that safeguard human rights. Key legislation acts cover such areas as labour rights (The Employment Act), freedom from discrimination (The Discrimination Act), gender equality (The Domestic Violence Act), access to justice (The Legal Aid Act), and protection of vulnerable groups (The 2009 Children’s Act, The 1969 Mental Disorders Act).

Botswana established the Office of the Ombudsman, which serves as a primary institution to deal with human rights issues but has a narrow and restrictive mandate (United Nations, 2013). According to the 2013 United Nations Universal Periodic Review (UPR) report, he government of Botswana has not yet established a fully independent national human rights institution in accordance with the UN Paris Principles, despite their commitment expressed in 2011 (United Nations, 2013).

Pre-existing vulnerabilities

In the period from 2011 until 2016, Freedom House rated Botswana as a “free state” on a global scale of freedom (Freedom House, 2012; 2013; 2014; 2015; 2016).⁹² The 2011/2012 World Justice Project Rule of Law Index report stated that Botswana was a top performer in the region in 2011, the index has improved towards 2014 but then deteriorated again in 2016 and 2017 (The World Justice Project, 2012). Corruption was present, as high political positions were reported to be held by family members of the president, and there were no restrictions in place on the private business activities of government officials (Freedom House, 2012; World Justice Project, 2012). According to the 2012 Transparency International Corruption Index, corruption score for Botswana was

⁹¹ Based on European Union Reports of the Human Rights Watch from 2012 until 2017.

⁹² This is not presented in the Profile with indicators because the methodology and approach to measuring the score has changed in 2017.

65 out of 100 (where 0 means highly corrupt and 100 means very clean) (Transparency International, 2012). A special court to expedite the processing of corruption cases was introduced in 2013 (Bertelsmann Foundation, 2016). However, the Transparency International score has deteriorated towards 2016 from 65 to 60 points (see Human Rights infographics on Botswana in Annex).

A serious shortcoming regarding human rights in Botswana is that it still applies the death penalty (EEAS, 2016). Fundamental freedoms (freedom of religion, media freedom, freedom of assembly and association) were generally respected, and independent trade unions were permitted under law. However, the right to strike and bargain collectively had been restricted (as evidenced, for example, by the 2011 Public Sector Strike) (US Department of State, 2012; Freedom House, 2012; Bertelsmann Foundation, 2016). Some stakeholders reported government attempts to influence press freedom and freedom of assembly (US Department of State, 2013; Bertelsmann Foundation, 2016; EEAS, 2016). The 2011-2012 World Press Freedom Index by Reporters Without Borders ranked Botswana as 42nd out of 179 countries and called it as one of the four Africa's traditional leaders in respect of journalists (RSF, 2012). The score remained stable from 2013 until 2016 and has deteriorated slightly in 2017 (from 77 to 75) (see Infographics in Annex).

Important human rights challenges in Botswana in the period from 2011 until 2016 referred to the rights of women, minorities, and indigenous peoples (including Basarwa /San communities), LGBTI persons, persons with disabilities, children, and individuals with HIV/AIDS (Freedom House, 2012; United Nations, 2017a; EEAS, 2016).

Despite legal prohibition under the Botswana's Employment Act, child labour was prevalent, as 13.5% of children in the age between 10 and 14 years old were involved in working activities in such sectors as cattle herding, agriculture, domestic work, and other forms of work (Centre for Human Rights of the University of Pretoria, 2008; US Department of Labour, 2016).

Discrimination and violence (including sexual violence) against women were also serious problems in Botswana (CEDAW, 2010; United Nations, 2017). The 2012 Global Gender Gap Report of the World Economic Forum ranked Botswana 77th out of 135 countries. While individual scores for educational attainment, health and economic participation of women were rather high for Botswana, political empowerment of women was indicated as problematic, showing the lowest scores within the index (WEF, 2012; 2016).

Other human rights issues in the period from 2011 to 2016 included overcrowded prison conditions, trafficking in persons and lengthy delays in judicial process (United Nations, 2017; 2017a).

5.3.Eswatini

Human rights framework

The Constitution of Eswatini provides the legal framework for human rights protection. It guarantees a range of fundamental rights and freedoms, including the right to life, equality, freedom of expression, association, and assembly. However, several UN treaty bodies found that the Constitution of Eswatini is not fully in line with the provisions of the international human rights treaties it ratified (e.g. ICCPR, CEDAW, and CRC) (United Nations, 2016). During the 2016 UN UPR, stakeholders noted that the Constitution of Eswatini did not sufficiently incorporate economic rights, does not explicitly protect the rights of the LGBTI community, and denied equal nationality rights for men and women (United Nations, 2016a).

Next to the Constitution, Eswatini also enacted laws, acts, and policy documents that safeguard human rights. For instance, the Industrial Relations Act (2000) governs

industrial relations, including collective bargaining, trade unions, and workers' rights in Eswatini. The Children's Protection and Welfare Act (2012) provides for the rights of children, including protection from abuse, neglect, and exploitation. The National Policy on Gender and Development was adopted in 2010 and outlines commitment of Eswatini to promoting gender equality and addresses gender-based discrimination and violence. However, UN UPR the Human Rights Council reported that national laws and policies are not in line with the provisions of the Constitution (United Nations, 2016; United Nations, 2021; 2021a).

In 2009 Eswatini established the Eswatini Human Rights and Public Administration Commission as a national human rights institution that has a mandate to investigate complains concerning alleged violations of fundamental rights and freedoms under the Constitution (Government of Eswatini, not dated). However, concerns have been raised regarding its compliance with the Paris Principles relating to the status of national institutions for the promotion and protection of human rights. This particularly referred to the independence, capacity, and functionality of the Commission (United Nations, 2016).

Pre-existing vulnerabilities

In the period from 2011 to 2016, Freedom House rated Eswatini as a "not free state" on a global scale of freedom (Freedom House, 2012; 2013; 2014; 2015; 2016).⁹³ Government corruption was a significant issue in Eswatini (Human Rights Watch, 2016b). According to the Transparency International Corruption Index (see Human Rights infographics on Eswatini in Annex), corruption score for Eswatini slightly improved in the period from 2011 until 2016 (Transparency International, 2016). However, corruption was reported as widespread. Although there were laws in place to penalise corruption by officials, the government's implementation of these laws was ineffective (US Department of State, 2016b).

Eswatini is the last absolute monarchy in Africa and one of the few remaining in the world. In the period from 2011 until 2017, civil and political rights were severely restricted in the country (Human Rights Watch, 2016b). Fundamental freedoms (including freedom of expression, assembly, and association) were limited in both the constitution and practice. Human rights defenders, trade unionists, and political activists in Eswatini faced ongoing harassment and were subjected to beatings, arrests, unfair trials on politically motivated charges, as well as ill-treatment and torture (Amnesty International, 2015; 2016; Human Rights Watch, 2016b). Media freedom was also restricted in Eswatini. The World Press Freedom Index by Reporters Without Borders for Eswatini ranked it as 144th out of 179 countries in 2012 (RSF, 2012). The score declined further in the period from 2013 until 2017 (from 53.2 to 48.7) (see Infographics in Annex).

The most important human rights challenges in Eswatini in the period from 2011 until 2016 included arbitrary interference with privacy, restrictions on such fundamental freedoms as freedom of speech, freedom of assembly and association, denial of fair elections, and trafficking in persons (Freedom House, 2012, EEAS, 2016). Other issues that warrant attention are workers' rights and gender equality (EEAS, 2016). Same-sex relationships were criminalised, although no prosecutions occurred. Widespread societal discrimination against LGBTI individuals persisted, leading them to conceal their sexual orientation and gender identity.

Child labour was prohibited by law, setting minimum employment ages and restrictions on hazardous work. However, enforcement was no adequate. Children engaged in working activities in the informal sector, particularly in agriculture, where they faced health and

⁹³ This is not presented in the Profile with indicators because the methodology and approach to measuring the score has changed in 2017.

safety risks. Child labour was also prevalent in street work, domestic servitude, and exploitation in illicit activities (US Department of Labour, 2016a).

Violence against women and girls was a serious challenge too, but the implementation of the Sexual Offences and Domestic Violence Bill had been delayed since 2006 (Human Rights Watch, 2016b, Amnesty International, 2016). The Global Gender Gap Index of the World Economic Forum ranked Eswatini 107th out of 135 countries. Individual scores for educational attainment and health and survival were rather high in the whole period from 2011 until 2017. Scores for the economic participation of women and the political empowerment of women, however, were indicated as problematic, showing the lowest scores among all indicators (WEF, 2016).

5.4. Lesotho

Human rights framework

The Constitution of Lesotho serves as the supreme law of the country and guarantees a range of fundamental rights and freedoms. Chapter II of the Constitution refers to the protection of such rights as the right to life, right to personal liberty, equality before law, fundamental freedoms, freedom from discrimination, prohibition of slavery and forced labour, prohibition of torture, among others. However, in its submission to the UN UPR in 2015, the Development for Peace and Education stated that only civil and political rights are justiciable according to the Constitution of Lesotho, while socio-economic and cultural rights are not justiciable and appear in the Constitution as principles of state policies (United Nations, 2015). Next to that, some stakeholders reported that the Constitution does not specifically provide for disability or sexual orientation as a ground for discrimination (United Nations, 2015a). The 2015 UN UPR report on Lesotho stated that Botswana did not incorporate CEDAW into its legal system to make it directly applicable before courts and administrative authorities in the country.

Other relevant laws cover areas such as labour rights (the Labour Code), freedom from discrimination, gender equality (The Equality Act and the Sexual Offences Act, the 2005 Domestic Violence Act), access to justice, and protection of vulnerable groups (The 2011 Children's Protection and Welfare Act, the 1998 Mental Health Act, the 2015 National Policy on Gender and Development). However, despite legal guarantees, some customary law practices are reported to be violating basic rights (EEAS, 2016).

The National Human Rights Commission Bill was approved in 2014 (United Nations, 2015), establishing a Human Rights Commission. However, according to the 2015 United Nations Universal Periodic Review (UPR) report, it is not fully compliant with the UN Paris Principles (United Nations, 2020).

Pre-existing vulnerabilities

Freedom House rated Lesotho as a "partly free state" on a global scale of freedom. Its score fluctuated in the period from 2011 until 2017, as its ranking was upgraded to "free state" in 2013 and then deteriorated back to "partly free state" in 2016 and 2017 due to continued political instability (Freedom House, 2012; 2013; 2014; 2015; 2016; 2017; EEAS, 2016).⁹⁴ There was a notable surge in corruption and theft committed by civil servants, with the majority of cases unprosecuted in 2011 (Freedom House, 2012). According to the 2012 Transparency International Corruption Index, corruption score for Lesotho was 45 out of 100 in 2012 (where 0 means highly corrupt and 100 means very clean) (Transparency International, 2012). Later, in the period from 2013 until 2016,

⁹⁴ This is not presented in the Profile with indicators because the methodology and approach to measuring the score has changed in 2017.

corruption reached alarming levels. Whistle-blower protection was absent, allowing corruption to thrive, while the anticorruption body lacked resources and faced allegations of protecting corrupt officials (Bertelsmann Foundation, 2014; 2016a; EEAS, 2016). The Transparency International Corruption Index score had deteriorated towards 2016 from 45 to 39 points (see Human Rights infographics on Lesotho in Annex).

Fundamental freedoms (freedom of religion, freedom of assembly and association) were generally respected, and independent trade unions were permitted under law. Freedoms of speech and press were also generally respected. However, media freedom experienced a decline with increased incidents of intimidation of journalists and legal actions against them (US Department of State, 2012a; 2016b, Freedom House, 2012; Bertelsmann Foundation, 2016a). The 2011-2012 World Press Freedom Index by Reporters Without Borders ranked Lesotho as 63rd out of 179 countries (RSF, 2012). The score remained stable from 2013 until 2016 (from 71.6 to 71.2) (see Infographics in Annex).

The most significant human rights issues in Lesotho in the period from 2011 until 2016 included torture, inhuman, or degrading treatment by the Lesotho Defence Force (LDF) members, police torture, impunity for these crimes, and widespread violence against women and children (US Department of State, 2016b; United Nations, 2015a; EEAS, 2016).

Other human rights challenges referred to the rights of women, minorities, and indigenous peoples, LGBTI persons, persons with disabilities, children, and individuals with HIV/AIDS (United Nations, 2015; 2015a; Bertelsmann Foundation, 2012; Freedom House, 2012; US Department of State, 2016b). Prevalence of HIV and AIDS in Lesotho was estimated at 23% of the total population in 2016 (Bertelsmann Foundation, 2016a). Discrimination against LGBTI persons was named as one of the reasons for failing to adequately rollout HIV prevention services (UNDP, 2016). Media reports indicated that individuals with disabilities faced violence and abuse (US Department of State, 2013a).

Despite legal prohibition under the Lesotho's Employment Act, child labour was prevalent. Approximately 23% of children under 14 years of age were involved in such work activities as subsistence farming, cattle herding and domestic services (US Department of State, 2012a; US Department of Labour, 2016b). Sexual assault and rape were prevalent, with many cases going unreported. Domestic violence against women was widespread. The Committee on the Elimination of All Forms of Discrimination Against Women (CEDAW) reported persistent discriminatory practices against women regarding inheritance and property rights (CEDAW, 2011). The 2012 Global Gender Gap Index of the World Economic Forum ranked Lesotho 14th out of 135 countries. While individual scores for educational attainment, health and economic participation of women were high for Lesotho, political empowerment of women was indicated as problematic, showing the lowest scores among all indicators (WEF, 2012; 2016).

Other human right issues included inadequate prison conditions and significant delays in court proceedings (EEAS, 2016).

5.5.Mozambique

Human rights framework

Title 3 of the Constitution of Mozambique refers to the protection of fundamental rights and freedoms and guarantees such rights as the right to life, right to personal liberty, freedom from discrimination, prohibition of forced labour, right to fair trial, right to information, fundamental freedoms, children's rights, and other rights.

The main statutory laws regarding fundamental rights and freedoms (the Penal Code, the Criminal Procedure Code, the Code of Judicial Costs) were revised in 2014, 2018 and 2020

to put them in line with the Constitution and international standards. The 2015 United Nations Universal Periodic Review (UPR) report on Mozambique stated that despite ratification, it did not fully incorporate provisions of several international human rights treaties (e.g. CEDAW, CRC, CERD) into its legal system to make it directly applicable before courts and administrative authorities in the country (United Nations, 2016b; 2016c).

Mozambique also enacted various laws, acts and policy documents that safeguard human rights. These laws cover areas such as labour rights (the 2007 Labour Law), freedom from discrimination, gender equality (The 2009 Law on Domestic Violence, the 2006 Gender Equality Policy and its Implementation Strategy, the 2010 National Action Plan for the Advancement of Women 2010-2014), protection of vulnerable groups (the 2008 Law against Human Trafficking Particularly Women and Children) (JICA & JDS, 2015).

In 2009 Mozambique established the National Human Rights Commission (CNDH) as an independent national human rights institution (NHRI) mandated to promote and protect human rights. However, it has not yet received accreditation as an NHRI that is established fully in line with the UN Paris Principles on the status of NHRIs (United Nations, 2010; 2016b). During the initial review under the International Covenant on Civil and Political Rights, the UN Human Rights Committee was concerned about the lack of independence and limited financial resources of the CNDH to be able to effectively carry out its mandate (HRC, 2013).

Pre-existing vulnerabilities

Over the whole period from 2011 until 2016, Mozambique was rated as a “partly free state” on a global scale of freedom (Freedom House, 2012; 2013; 2014; 2015; 2016), the Civil Liberties Index declined due to an increasingly restricted media environment, including increased attacks on journalists and a steep rise in the cost of internet access.⁹⁵ The law of Mozambique provides criminal penalties for corruption. However, this law had not been effectively implemented, as corruption continued to be a serious issue (United Nations, 2016b; 2016c). This is reflected in the Transparency International Corruption Index for Mozambique, which shows that corruption score deteriorated from 31 in 2012 to 27 in 2016 (where 0 means highly corrupt and 100 means very clean) (Transparency International, 2012; 2016) (see Human Rights infographics on Mozambique in Annex).

The 2016 UN UPR reports pointed to issues regarding freedom of assembly and association, and freedom of expression, reporting arbitrary arrests of participants in peaceful demonstrations (United Nations, 2016b; 2016c). The 2011-2012 World Press Freedom Index by Reporters Without Borders for Mozambique ranked it as 66th out of 179 countries (RSF, 2012). The score remained stable from 2013 until 2016 (from 71.6 to 71.2) (see Infographics in Annex).

The most significant human rights issues included abuses in the internal conflict, political repression, lack of respect for civil liberties, violence against women and albino persons, human trafficking, and child labour (EEAS, 2016; United Nations, 2016b; 2016c).

A 2017 report on child labour showed some success in eradicating severe child labour. However, child labour remained a serious challenge from 2011 until 2017, as children were found working in dangerous settings, for example, in the production of tobacco. Enforcement authorities lacked the resources and competence to effectively combat child labour, and the government lacked a specific framework to coordinate actions against the worst kinds of child labour (U.S. Department of Labour, 2017).

⁹⁵ This is not presented in the Profile with indicators because the methodology and approach to measuring the score has changed in 2017.

Despite established political and legal framework regarding gender-based violence, violence against women remained a serious issue over the period from 2011 until 2017 (United Nations, 2016). The 2012 Global Gender Gap Report of the World Economic Forum ranked Mozambique 23rd out of 135 countries. Individual scores indicate persistent challenges regarding women representation in decision-making positions, especially at the local level (WEF, 2017; United Nations, 2016b).

Other human rights problems included disappearances, restrictions on freedom of speech and association, interference with privacy (US Department of State, 2016c).

5.6. Namibia

Human rights framework

Chapter 3 of the Constitution of Namibia refers to the protection of fundamental rights and freedoms and guarantees such rights as the right to life, right to personal liberty, freedom from discrimination, prohibition of slavery and forced labour, right to fair trial, right to privacy, children's rights and other rights. However, in its submission to the 2015 UN UPR, African Freedom of Information Centre (AFIC) stated that the Constitution did not contain any provision that recognises the right to information and freedom of expression (United Nations, 2016d). Next to that, the Constitution does not specifically provide for disability or sexual orientation as a ground for discrimination (United Nations, 2016d).

Other relevant laws cover areas such as labour rights (the 1998 Affirmative Action (Employment) Act, the 2007 Labour Act), freedom from discrimination, gender equality (The 2003 Combating of Domestic Violence Act), access to justice (The 2012 Access to Justice Act), and protection of vulnerable groups (The 2015 Child Care and Protection Act, the 2004 Disabilities Act). Despite advanced legislative framework, the 2015 United Nations Universal Periodic Review (UPR) report on Namibia stated that it did not fully incorporate provisions of several international human rights treaties (CEDAW, CRPD, CAT, ICCPR) into its legal system and that it is not fully in line with the international standards (United Nations, 2016d; 2016e).

An independent national human rights institution established in full compliance with the UN Paris Principles – Office of the Ombudsman of Namibia – received its accreditation in 2003 (United Nations, 2016d; GANHRI, 2023).

Pre-existing vulnerabilities

Over the whole period from 2011 until 2016, Namibia was rated as a “free state” on a global scale of freedom (Freedom House, 2012; 2013; 2014; 2015; 2016).⁹⁶ At the same time, official corruption persisted as a major problem, and investigations into significant cases progressed at a slow pace. The Anti-Corruption Commission (ACC) was established in 2006 to address this issue and operated with a significant degree of independence, being accountable solely to the National Assembly. However, it lacked the power to prosecute offenders (Freedom House, 2012). Corruption remained high during the whole period from 2011 until 2016, involving politicians and high-ranking officials. The tender system for government contracts was characterised as particularly susceptible to abuse, contributing to the prevalence of corruption in the country (Bertelsmann Foundation, 2014a). This is reflected in the Transparency International Corruption Index for Namibia, which shows that corruption score did not change significantly, fluctuating from 48 out of 100 in 2012 (where 0 means highly corrupt and 100 means very clean) to 51 out of 100 in 2017 (Transparency International, 2012; 2016) (see Human Rights infographics on Namibia in Annex).

⁹⁶ This is not presented in the Profile with indicators because the methodology and approach to measuring the score has changed in 2017.

Fundamental freedoms (freedom of religion, freedom of assembly and association) were generally respected, and independent trade unions were permitted under law. The government effectively enforced laws regarding freedom of association. However, some trade unions were officially aligned with the Swapo party, which some workers felt restricted their independence in advocating for labour rights (US Department of State, 2012b; 2016d). Some concerns were raised regarding freedom of the media (EEAS, 2016; Bertelsmann Foundation, 2014a). The 2011-2012 World Press Freedom Index by Reporters Without Borders ranked Namibia as 21st out of 179 countries (RSF, 2012). The score deteriorated from 2013 until 2017 (from 87.5 to 82.9) (see Infographics in Annex).

The most significant human rights issues in Namibia in the period from 2011 until 2016 included lengthy pretrial detention and slow pace of judicial proceedings, the use of excessive force during arrests, violence against women and children, and child labour (Bertelsmann Foundation, 2012a; Freedom House, 2012; EEAS, 2016).

The 2015 UN UPR of Namibia reported concerns about the high level of HIV/AIDS infections among women and children (United Nations, 2016d; CEDAW, 2016). The 2015 Government of Namibia Report estimated that approximately 16% of persons between the ages of 15 and 49 in Namibia were affected by HIV (Ministry of Health and Social Services of Namibia, 2015), disproportionately affecting individuals in their working years, leading to a high mortality rate within this age group. HIV/AIDS contributed to maternal deaths and orphans' vulnerability to abuse, while societal discrimination against those with HIV/AIDS persisted (CEDAW, 2015; United Nations, 2016d).

Child labour remained a persistent issue, with children predominantly engaged in activities such as herding livestock and working as domestic servants or in family businesses on communal farms. According to the 2011 UNICEF data, child labour rates were 3.9% for rural children aged between 10 and 14 and 2.6% for children aged between eight and 11 (US Department of State, 2016d; US Department of Labour, 2016c).

Women in the country are protected by laws that prohibit gender-based discrimination, including in employment. However, women still faced discrimination in various aspects of their lives, such as accessing credit, receiving fair salaries, pursuing education, and obtaining housing. While there are legal provisions against discriminatory practices for women married under civil law, those married under customary law continued to experience both legal and cultural discrimination. Substantial rape cases were reported, however, over one-third of rape victims choose to withdraw their court cases due to various factors such as pressure from the accused or family, feelings of shame, threats, or the lengthy legal process involved (US Department of State, 2012b; 2016d; EEAS, 2016). The scores of the Global Gender Gap Index of the World Economic Forum improved for Namibia in the period from 2011 until 2016, showing improvements in educational attainment, health, and economic participation of women in Namibia, but political empowerment of women was indicated as problematic, showing the lowest scores among all indicators (WEF, 2012; 2016).

LGBTI individuals in the country faced harassment when seeking public services, and some politicians opposed protective legislation for their rights. OutRight Namibia reported that the police often dismissed complaints of violence against LGBTI individuals (US Department of State, 2012b; 2016d).

Other human right problems included discrimination against ethnic minorities and indigenous peoples, attempts of the government to restrict media freedom, and lack of public access to government information (United Nations, 2016d; EEAS, 2016).

5.7.South Africa

Human rights framework

The Constitution of South Africa (1996) is the supreme law that provides a comprehensive and ambitious framework for the protection and promotion of human rights. The Bill of Rights (Chapter 2 of the Constitution of South Africa) guarantees a wide range of civil, political, economic, social, and cultural rights: right to life, freedom from discrimination, prohibition of slavery, servitude, and forced labour, fundamental freedoms, freedom of movement, labour rights, right to own property, right to healthcare, right to social security, right to a healthy environment, right to adequate housing and others. Another key legislation on human rights in South Africa is the Promotion of Equality and Prevention of Unfair Discrimination Act (2000) which complements the constitutional guarantee of equality and prohibits unfair discrimination on various grounds, including race, gender, age, disability, and sexual orientation. It provides mechanisms for addressing and remedying acts of discrimination.

Next to that, South Africa has enacted various laws that aim to protect human rights. Some examples of such legislation include: the Employment Equity Act (1998) which aims to promote equal opportunities and fair treatment at work; the Protection of Personal Information Act (2013), which safeguards the right to privacy and establishes principles and procedures for the lawful handling of personal data; the Promotion of Access to Information Act (2000), which promotes transparency and accountability by providing the public with the right to access information held by public and private bodies; the Prevention and Combating of Trafficking in Persons Act (2013) which criminalises human trafficking and provides for the prevention, investigation, and prosecution of trafficking offences, and many others.

An independent national human rights institution established in accordance with the Paris Principles – South African Human Rights Commission – received its accreditation in 1999 by the Global Alliance of National Human Rights Institutions (GANHRI) (status A – fully in line with the Paris Principles on NHRIs). In 2013, the new South African Commission Act No.40 extended the mandate and functions of the Commission (United Nations, 2017b; GANHRI, 2023). The Committee on the Elimination of All Forms of Racial Discrimination noted in its periodic review in 2016 that the Commission did not have sufficient financial resources to effectively carry out its mandate (CERD, 2016).

Pre-existing vulnerabilities

In the period from 2011 to 2016, South Africa was rated as a “free state” on a global scale of freedom (Freedom House, 2012; 2013; 2014; 2015; 2016).⁹⁷ Corruption was present and anti-corruption laws were reported as ineffective. According to the 2012 Transparency International Corruption Index, corruption score for South Africa was 43 out of 100 (where 0 means highly corrupt and 100 means very clean). After the dissolution of the Scorpions (anti-corruption unit), the government’s ability to fight corruption was reduced (Bertelsmann Foundation, 2016b). The Transparency International score remained approximately at the same level over the whole period from 2011 until 2016, with 43 points recorded in 2012 and 45 points in 2016 (see Human Rights infographics on South Africa in Annex).

Fundamental freedoms (freedom of religion, freedom of expression, media freedom, freedom of assembly and association) were generally respected, and independent trade unions were permitted under law. Disproportionate response of police and private security

⁹⁷ This is not presented in the Profile with indicators because the methodology and approach to measuring the score has changed in 2017.

to the protests were reported to be an issue (US Department of State, 2016e; Freedom House, 2012). The World Press Freedom Index by Reporters Without Borders for South Africa was high, in comparison with other countries in the region and improved slightly in the period 2013-2016, as the score increased from 75 points in 2013 to 78 points in 2016 (see Infographics in Annex).

Between 2011 and 2016, main human rights issues in South Africa included the use of excessive force, including torture, by police forces, prison overcrowding, and vigilante violence (United Nations, 2017c; US Department of State, 2016e).

Other human rights concerns from 2012 to 2017 in South Africa included arbitrary arrests, prolonged pretrial detention, lengthy delays in court proceedings, human trafficking, violence against women and children, discrimination against persons with disabilities, LGBTI persons, persons with albinism, indigenous peoples, attacks on foreigners, forced labour (including child labour), attacks on refugees, asylum seekers and migrants (Human Rights Watch, 2016b; EEAS, 2016; United Nations, 2017b; 2017c).

Child labour in South Africa was reported in agriculture, street work, domestic work, and as a result of human trafficking (US Department of Labour, 2016d; United Nations, 2017c).

The Human Rights Committee and the Committee on the Rights of the Child were both concerned about the prevalence of gender-based and domestic violence, as well as the low conviction rates (United Nations, 2017b). The 2016 WEF Global Gender Gap Report noted that South Africa closed its gender gaps in women's labour force participation and estimated earned income and improved its record regarding the political empowerment score. However, at the same time, it recorded a decrease in wage equality (WEF, 2016). The overall score remained stable over the whole period 2011 to 2016 (see Annex).

Despite the efforts of the government of South Africa to address poverty and social inequality, levels of inequality were recorded as high, with approximately 56% of children living in poverty and 32% of children living in families with no working adults (United Nations, 2017b; EEAS, 2016).

During the 2017 UN UPR multiple stakeholders also voiced concerns about the impact of mining activities on the right to water and the substantial harm they cause to the environment (United Nations, 2017c).

Many of the issues described in the baseline analysis are not likely to be directly related to trade relations under the EU-SADC EPA. However, pre-existing vulnerabilities and conditions of stress may be useful to consider in the impact of the Agreement on human rights.

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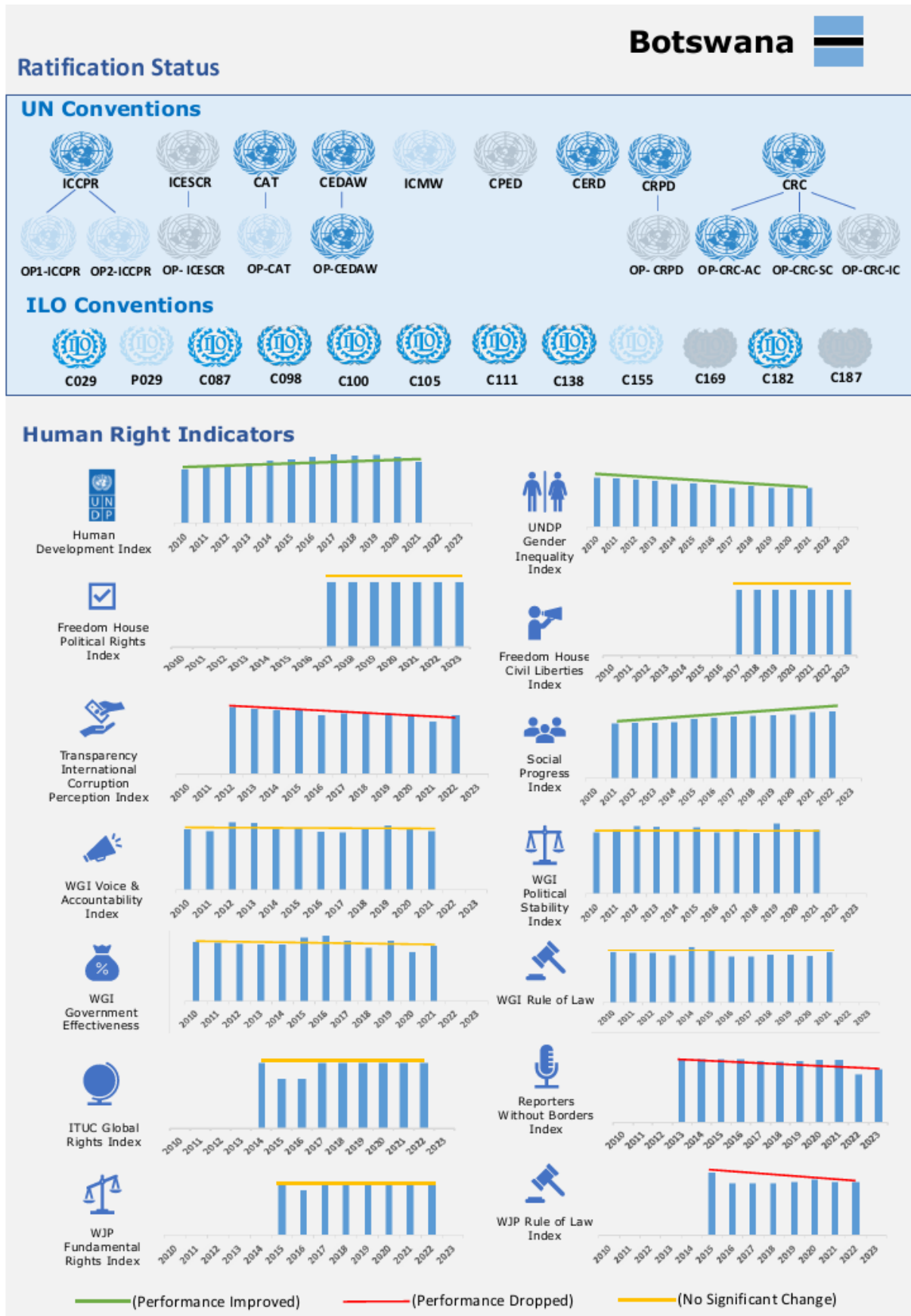
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ANNEX: HUMAN RIGHTS INFOGRAPHICS





Ratification Status

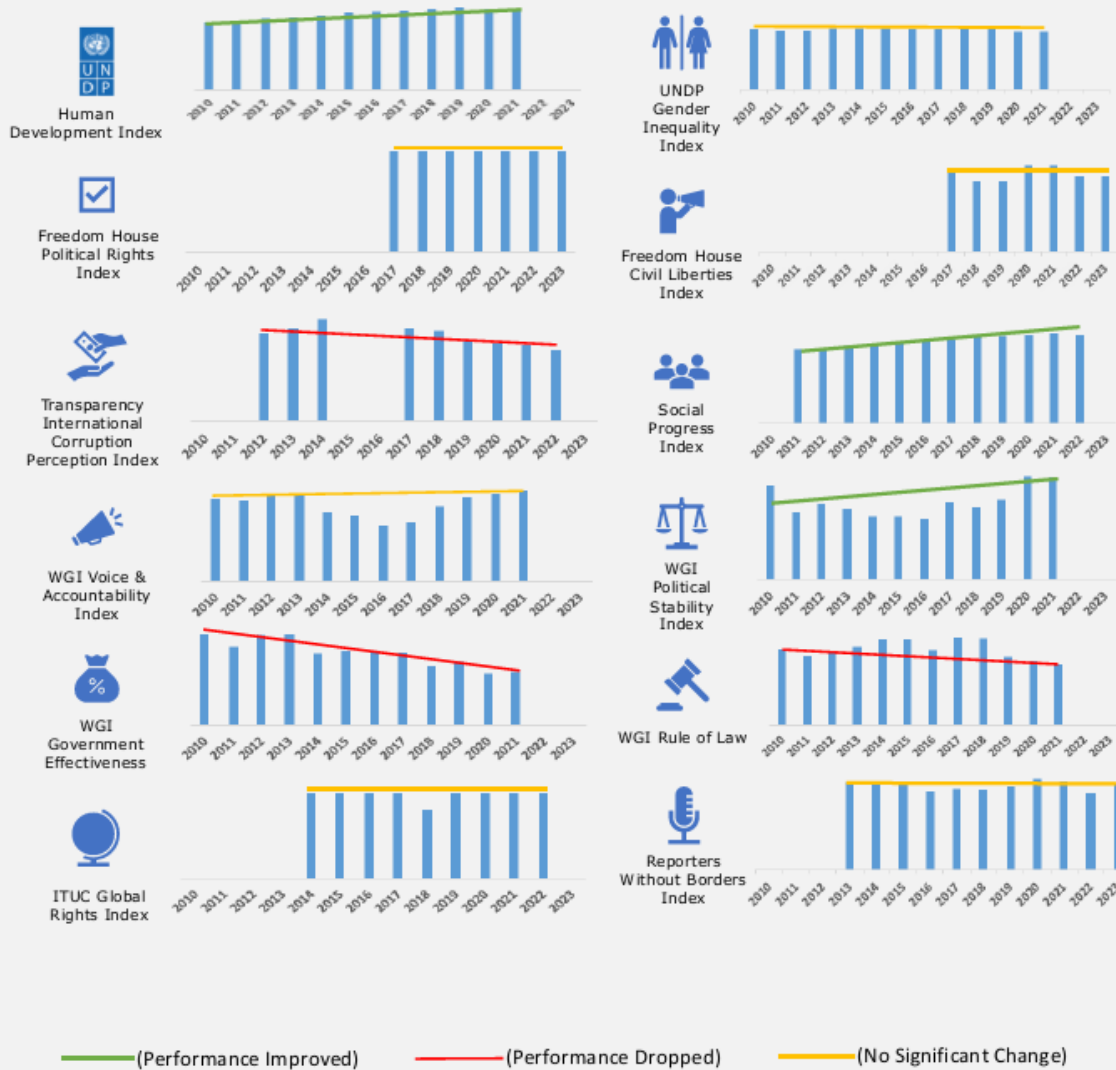
UN Conventions



ILO Conventions



Human Right Indicators





Ratification Status

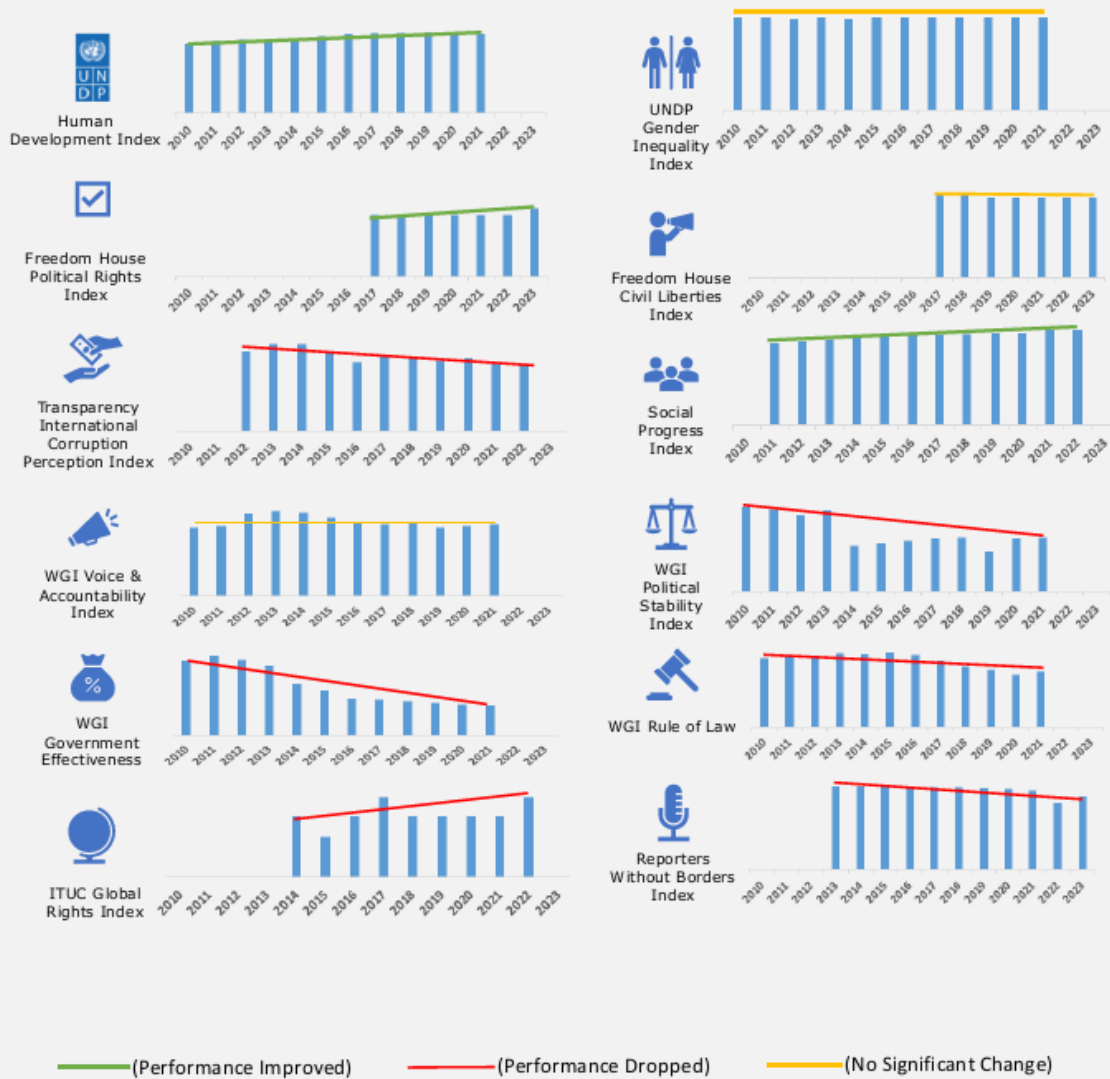
UN Conventions



ILO Conventions



Human Right Indicators



Mozambique



Ratification Status

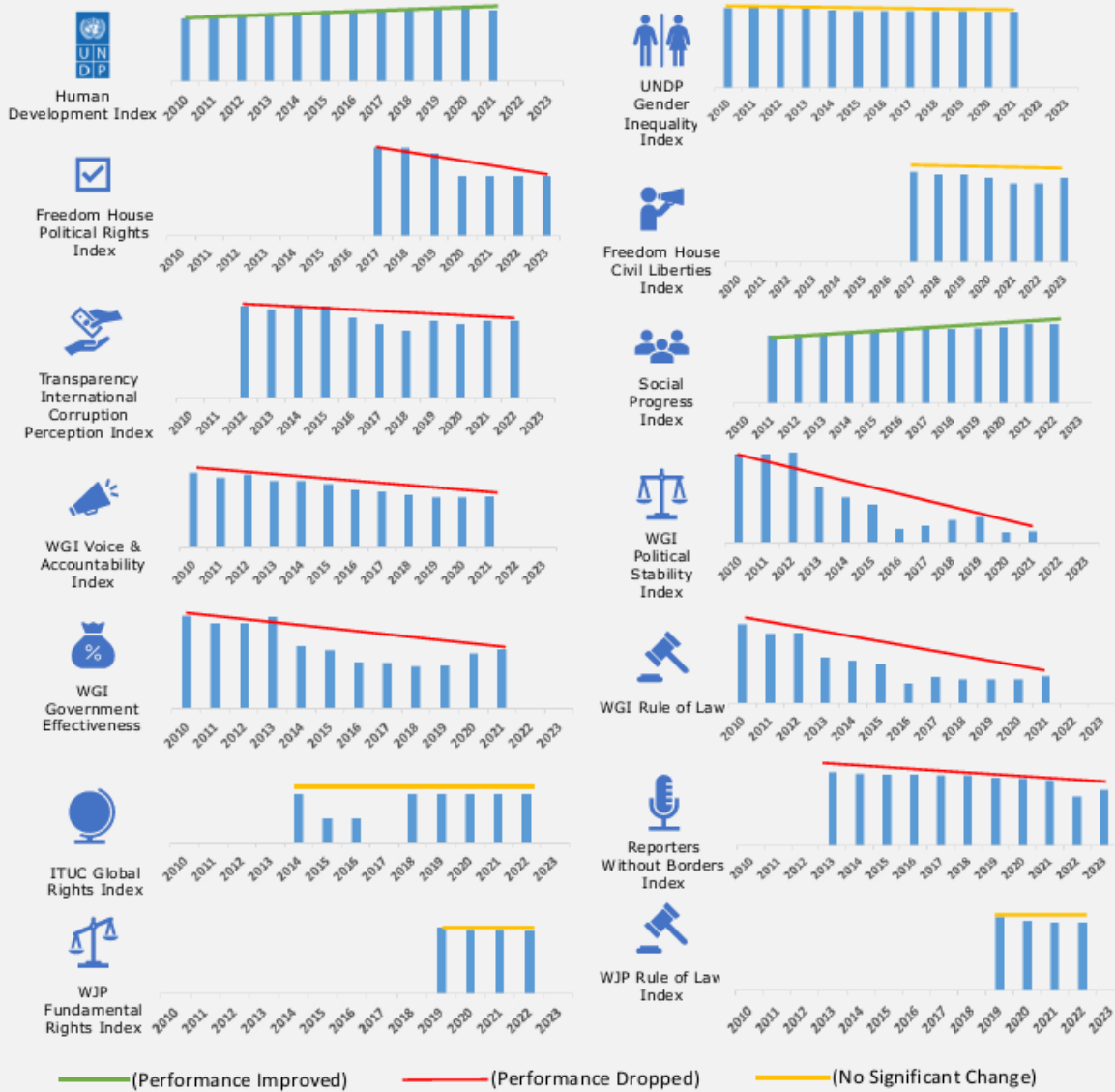
UN Conventions



ILO Conventions



Human Right Indicators



Ratification Status

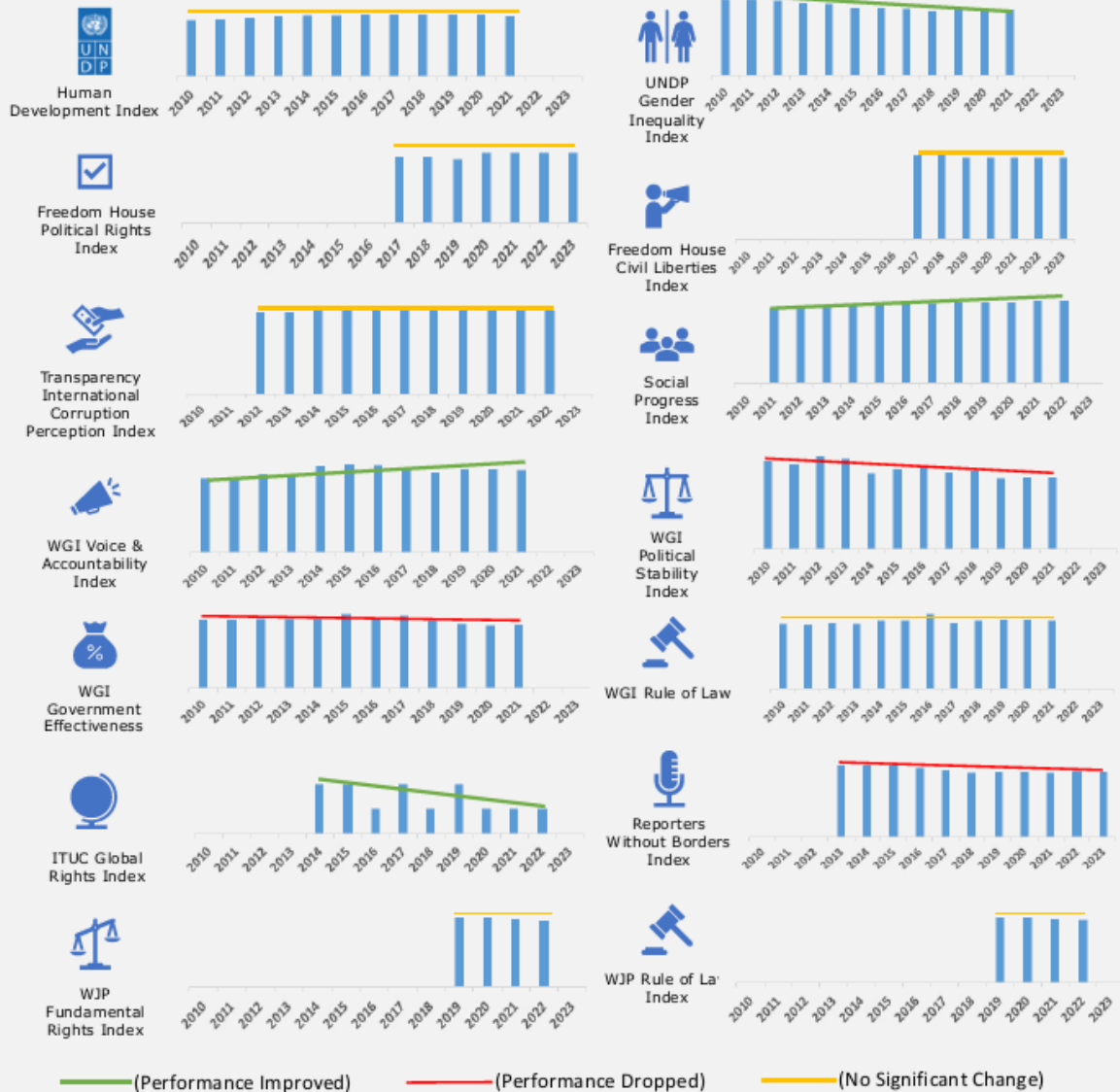
UN Conventions



ILO Conventions



Human Right Indicators



Ratification Status

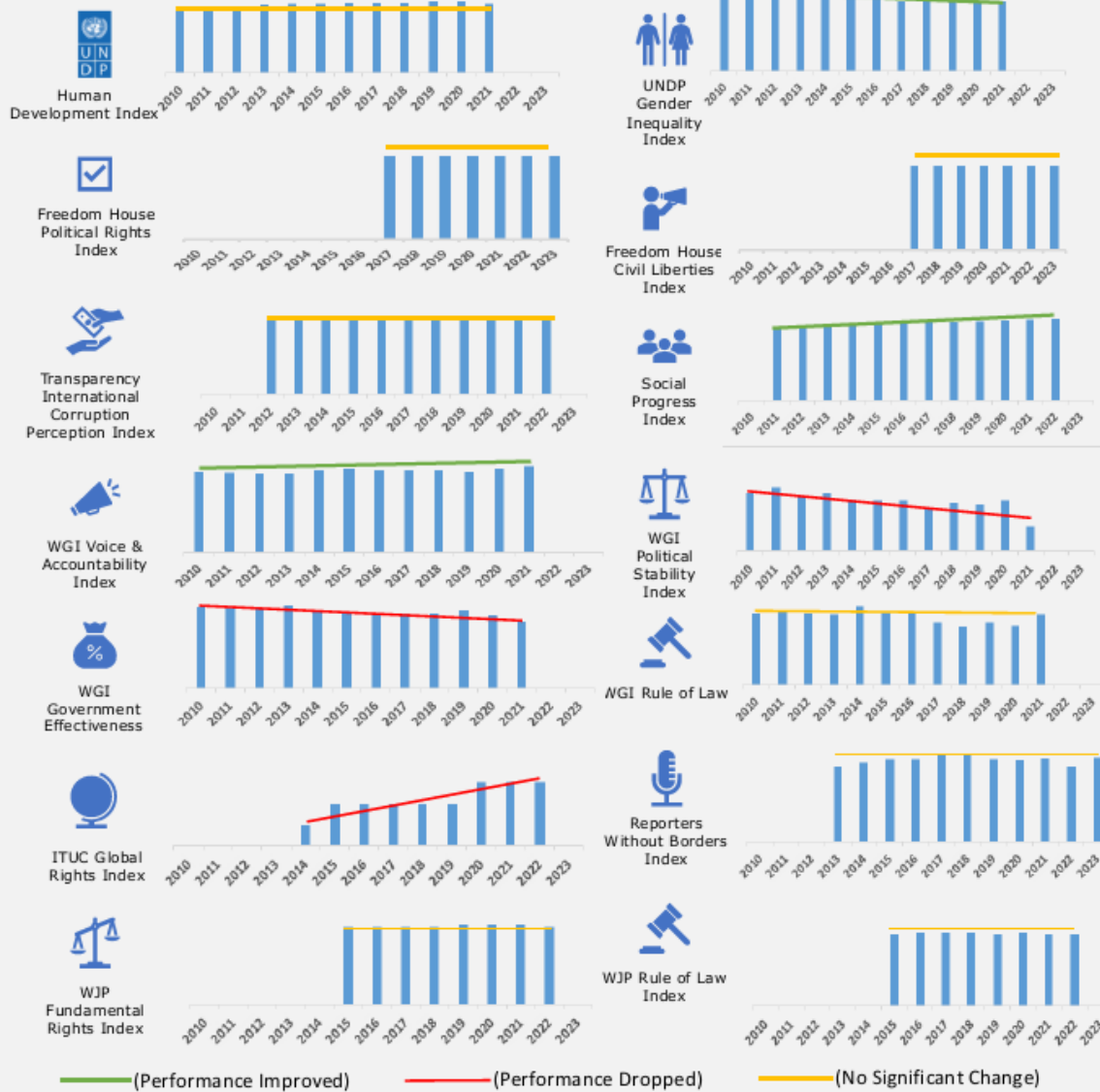
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Human Right Indicators



Appendix E2: Results of Screening and Scoping of Human Rights Effects of the EPA

This appendix provides the screening and scoping exercise (Step 2 of the human rights impact analysis) and covers the overall effects of the EU-SADC EPA on human rights. It focuses primarily on the impact of the EPA on human rights in the SADC EPA States. Due to the asymmetry in the economic size between the EU and the partner countries, the results of the economic modelling show that the EPA had a larger relative economic impact on SADC partners than on the EU. This also implies that the impacts on human rights accrue primarily in the SADC EPA States and not in the EU.

The screening and scoping process relies on the criteria defined in the EC Guidelines on the analysis of human rights impacts in impact assessments for trade-related policy initiatives (European Commission, 2015):

1. Specific link to trade measures under the agreement,
2. Focus on human rights impacts directly related to trade,
3. Type and direction of the impact,
4. Pre-existing vulnerabilities in the context of trade.

In line with the EC Guidelines and making use of the Better Regulation Toolbox⁹⁸, the overview of the affected rights in this appendix is presented in country tables and includes the following information:

- Specific rights that are likely to have been affected by the EU-SADC EPA and the normative basis for each right,
- The type of the expected impact (direct/indirect), where a direct effects means that the issue is covered in the Agreement (such as labour rights and right to participate in public affairs) or it stems directly from employment changes resulting from the Agreement. Indirect effects, in contrast, are the result of a longer causal chain;
- The magnitude of the expected impact (major/minor/no impact);
- The direction of the expected impact (positive/negative); and
- Potentially affected population groups (where possible/relevant).

Each table is followed by a short explanation on the scope and the content of the impact for each of the rights identified as likely to be affected by the EPA.⁹⁹

1. BOTSWANA

The analysis of the economic modelling results per sector allows to look at the possible impact of the EPA on specific human rights in Botswana. The preliminary findings of this analysis are presented in Table 1.¹⁰⁰

⁹⁸ https://commission.europa.eu/law/law-making-process/planning-and-proposing-law/better-regulation/better-regulation-guidelines-and-toolbox/better-regulation-toolbox_en

⁹⁹ The human rights presented in the country tables are defined as set out in the International Bill of Human Rights (UDHR and two International Covenants) with references to other relevant human rights instruments (core international human rights treaties and their protocols, ILO fundamental Conventions and other international and regional treaties).

¹⁰⁰ The analysis is based on scenario A of the economic modelling, which compares the EPA with a situation in which the TDCA would have continued to be applied. Tables showing the production and labour effects of the EPA for scenario B, which compares the EPA with a situation in which the Parties would have traded under WTO (MFN) rules, are provided in appendices B2 and C2.

Table 1: Overview of human rights that may have been affected by the EU-SADC EPA in Botswana¹⁰¹

Human right/normative framework ¹⁰²	Type of impact	Scale/ direction of impact	Potentially affected vulnerable population groups
Right to an adequate standard of living (UDHR, Art. 25; ICESCR, Art. 11; Committee on Economic, Social and Cultural Rights (CESCR) General Comments No. 4, 7, 12, 15 & 19; CFR, Art. 34)	Direct	Minor (+/-)	Workers from sectors affected by employment changes, especially workers from such vulnerable population groups as women, children, persons with disabilities, indigenous peoples, migrant workers
Right to water (UDHR, Art. 25; ICESCR, Art.11; CESCR General Comment No.15; African Charter on Human and Peoples' Rights (ACHPR) Guidelines on the Rights to Water in Africa; CEDAW, Art. 14(2); CRC, Art. 24(2))	Indirect	Minor (+)	Populations living in proximity to water-polluting/water-intensive economic activities
Right to join and form trade unions (incl. right to collective bargaining) (UDHR, Art. 20; ICCPR, Arts. 21 & 22; CFR, Art. 12; ILO Conventions 87 & 98)	Direct	No impact	
Right to just and favourable conditions of work (UDHR, Arts. 23 & 24; ICESCR, Arts. 6 & 7; CESCR General Comment No.23; CEDAW, Art. 11; CRPD, Art. 27; CFR, Arts. 15 & 31; ACHPR, Art. 15)	Direct	No impact	
Freedom from discrimination (UDHR, Art.2; ICCPR, Art. 26; ILO Conventions 100 & 111)	Direct	No impact	
Freedom from slavery and forced labour, incl. child labour (UDHR, Art. 4; ICCPR, Art. 8; ILO Conventions 29 & 105, 138 & 182, Protocol 029; CFR, Art. 5; CRC; ACHPR, Art. 5)	Direct	No impact	Children working in the cattle sector
Right to participate in public affairs (ICCPR, Art. 25; HRC General Comment No. 25)	Direct	No impact	
Women's rights (gender equality) (CEDAW; ICCPR & ICESCR, Art.2; Protocol to the ACHPR on the Rights of Women in Africa (Maputo Protocol))	Direct	Minor (-)	Women working in textile and garment sectors in Botswana
Indigenous peoples' rights, incl. land rights (United Nations Declaration on the Rights of Indigenous Peoples (UNDRIP), Arts. 3, 19, 25 & 26; ILO Convention 169 ¹⁰³ ; CESCR General Comment No. 26)	Indirect	Minor (+) No evidence found reg. the impact on the right to own property (land rights)	Basarwa/San communities working in the cattle sector

Source: own compilation.

1.1.Right to an adequate standard of living

The impact of the EU-SADC EPA on the right to an adequate standard of living in Botswana could have materialised through the overall effects of the EPA on welfare, GDP and wages, as well as sectoral employment changes. Employment and income are critical factors that contribute to an individual's ability to enjoy an adequate standard of living as defined in Article 25 of the UDHR and Article 11 of the ICESCR.

¹⁰¹ The table does not include rights where initial desk research indicated no effect by the EPA.

¹⁰² Botswana has not yet ratified the ICESCR.

¹⁰³ Botswana has not ratified ILO Convention No. 169.

As already noted in section 6.1 of the main report, the overall impact of the EPA on GDP and wages in Botswana has been limited. This suggests a minor overall impact on the right to an adequate standard of living.

At sector level, as also noted above, minor positive employment changes in the sugar, other crops, cattle, meat (both ruminant and others), and “other” manufacturing sectors suggest a minor positive impact on the right to an adequate standard of living of workers from these sectors. Conversely, minor negative employment changes in the textiles, wearing and apparel, leather, rubber and plastics products, and motor vehicles and parts sectors suggest a minor negative impact on the right to an adequate standard of living of workers from these sectors.

The fact that wages marginally increase overall, suggests that workers losing their jobs, are pulled into other sectors for better job opportunities. However, workers in negatively affected sectors may be made redundant which may affect their ability to pay for housing, food, and health care, or to cover other expenditures of their families which are necessary for a dignified life. Much of the actual effect will depend on the ability in practice for workers in negatively affected sectors to move to growing sectors.

1.2.Right to water

The impact of the EU-SADC EPA on the right to water in Botswana could have materialised through an increase or decrease in production in water-intensive and water-polluting economic sectors (such as textiles, wearing and apparel, leather, rubber and plastics products, motor vehicles and parts, and others), affecting the availability and quality of water, two criteria from the Availability, Accessibility, Acceptability and Quality (AAAQ) framework defined in the CESCR General Comment No. 15 on the right to water.¹⁰⁴

According to several studies, the fashion industry has three main negative environmental impacts related to water: high water usage, high levels of chemical pollution, and high levels of physical microfiber pollution (Fair Planet, 2022; Bailey et al., 2022; European Parliament, 2019). The leather sector is also reported to be a highly water-polluting sector as wastewater from tanneries contains chromium which pollutes waterways and groundwater, affecting people’s health. Alternatives to chrome tanning and application of eco-friendly techniques were not common in Sub-Saharan African states during most of the EPA period (Oruko et al., 2020).

According to the economic modelling results, the EPA has led to a decrease in production in the textiles (-1.9%), wearing and apparel (-2.4%), and leather (-0.8%) sectors in Botswana, suggesting less water pollution from economic activities in these sectors. These decreases are notable considering that the share of Botswana’s textile production that is directly destined to the EU is limited: A large share of textile exports from Botswana (approximately 89%) go to South Africa and other countries in Africa (Textile Infomedia, 2023).

Other major consumers of water have also seen an output decrease in Botswana because of the EPA such as the automotive sector (-1.8%), as well as the rubber and plastics products sector (-0.5%), another water-polluting economic sector in the country (Mmereki, 2019).

Based on the model simulations, the impact of the EPA on these water-intensive and water-polluting economic sectors (and consequently, on the right to water) has been slightly positive. Nevertheless, due to the lack of related data on actual water use and pollution

¹⁰⁴ The right to water is also related to the right to the highest attainable standard of health (Art. 12(1) ICESCR) and the rights to adequate housing and adequate food (Art. 11(1) ICESCR).

from the concerned sectors in Botswana it is not possible to establish a more detailed level of the impact.

1.3. Labour rights (right to just and favourable conditions of work, right to join and form trade unions, incl. the right to collective bargaining, freedom of discrimination at work)

The 2023 ITUC Global Rights Index ranks Botswana as a country with systematic violations of rights of workers. This ranking has not changed since 2017 when the EPA entered into force (ITUC, 2023). Despite some employment changes triggered by trade under the EPA, it is not likely that this has led to a significant impact on labour rights in Botswana overall. However, programmes aimed at decent work and improved labour standards in export sectors introduced in Botswana after the EPA came into force could have played a role in the promotion of labour standards in the country. The impact of the EPA through cooperation under the TSD Chapter is covered in section 4.1 of the main report.

1.4. Prohibition of slavery and forced labour, incl. child labour

Child labour in Botswana is reported to be common in farming including rearing livestock, mending fences and moulding bricks, street work, domestic work and as a result of commercial sexual exploitation, sometimes as a result of human trafficking (US Department of Labor, 2022). Children of the indigenous Basarwa/San peoples were reported to be engaged in child labour on large cattle farms in Gantsi (US Department of Labor, 2022; United Nations, 2023a). Forced labour has been recorded in cattle herding (US Department of Labor, 2022; United Nations, 2023).

Botswana has ratified all key international conventions concerning child labour (the ILO Conventions No. 138 & 182, the CRC and two of its Optional Protocols, and the Palermo Protocol on Trafficking in Persons). The Government has introduced related laws and regulations. However, a significant gap in Botswana's legal framework pertains to the absence of a compulsory education age that aligns with the minimum age for employment. While light work activities are allowed for children at the age of 14, the conditions or types of light work activities permitted for children are not defined. A list of hazardous work activities for children is also not defined. Enforcement of child labour-related laws is sometimes hindered by insufficient human and financial resources of enforcement agencies. In a situation of increased demand in the sectors with forced or child labour, employers might resort to using more forced and child labour to meet that demand, especially if it is cheaper, and labour protection is not sufficiently enforced.

Trade under the EPA has led to a minor increase in production (by 0.8%) in one of the sectors where child labour can be found in Botswana – the cattle sector. However, no evidence of a causal link between increased production under the EPA and child labour has been identified so far.

1.5. Right to participate in public affairs

Botswana “has long had a reputation of stable and well-established democracy” (EEAS, 2023). Non-governmental organisations (NGOs) in Botswana, including human rights organisations, generally operate without any restrictions (Freedom House, 2023). However, Botswana lacks laws regarding the access to information (Southern Africa Litigation Centre, 2023; Freedom House, 2023), which limits government transparency.

Stakeholders consulted by the evaluation team so far noted that awareness about the Agreement has been very low in Botswana. This suggests that the potential to increase civil society participation and involvement in decision making regarding TSD under the EPA has not been used so far.

In this context, the evaluation team notes that compared to other EU trade agreements, the TSD Chapter in the EU-SADC EPA does not include provisions that require the establishment of civil society Domestic Advisory Groups (DAGs), or any regular meetings involving civil society. Article 10(3) of the EPA merely refers to the possible involvement of “relevant stakeholders” in dialogue and cooperation on the TSD Chapter through the TDC. The actual involvement of civil society in the implementation of the EPA has also been limited (see sections 4.1 and 4.11 of the main report). This points to a causal link between the absence of binding provisions in the EPA on civil society participation to a lack of awareness and an absence of a notable role of Botswana’s civil society in the implementation and monitoring of the Agreement, and the chance to foster the right to participate in public affairs has so far been underused with respect to participation in Botswana’s trade policy vis-à-vis the EU.

1.6. Women’s rights

According to the World Economic Forum’s Global Gender Gap Index, Botswana has closed its gender gap on educational attainment, and the country has high scores for the economic participation of women and their access to healthcare. On the other hand, the political empowerment score has remained very low since 2017, as women continue to be underrepresented in the government and in decision-making positions (WEF, 2023). Gender-based violence and domestic violence remain a matter of concern (United Nations, 2023; 2023a), and there is no legal requirement for women to receive equal pay for equal work (US Department of State, 2022).

An impact of the EPA on women could have materialised through an increase or decrease in employment in sectors that engage a high share of female workers which can affect their jobs and income, as well as access to social protection. In some cases, factories facing increased competitive pressure may also reduce wages as a cost-cutting measure and exacerbate existing gender wage gaps and make it more difficult for women to support themselves and their families.

The economic modelling results indeed indicate a shift of employment away from the country’s largest manufacturing employer of women (more than 80% of jobs in the sector are held by women): the combined textile and apparel sector in Botswana. The EPA’s labour effects in these sectors point to a decrease of 1.8% in the textile sector and 2.4% in the apparel sector, suggesting a minor but direct impact on women employed in this sector, affecting their incomes from these jobs and their livelihood. Also, many of the jobs are for low-skilled persons, oriented at youth and women, providing a livelihood for these vulnerable population groups (Euromonitor, 2023).

1.7. Indigenous peoples’ rights

While exact data on the number of indigenous peoples (Basarwa) living in Botswana are not available, some estimates point to a population of approximately 50,000 people. Most Basarwa are reported to work on farms, as small cattle farmers or labourers on small farms cultivating crops and raising livestock. They also sell handicrafts, meat or foraged products, such as thatching grass or firewood (Minority Rights, 2023).

Data limitations do not allow to see how many Basarwa people are employed in agricultural sectors (and in what sectors exactly). Regarding the cattle sector, the economic modelling results show a minor increase in production and employment in this sector (by 0.8% each). It may be possible that they have been positively affected by the EPA due to the job creation in this sector.

Regarding the impact of the EPA on the rights to property of the Basarwa, including land tenure and risk of “land grabbing”, no causal link to the EPA has been identified so far. Historically, the Basarwa have faced challenges related to their land rights. Reports,

including recent ones, state that the Basarwa communities face land grabbing as a result of wildlife conservation and tourism initiatives, exploration and extraction of minerals (when mining activities encroached on the land traditionally used by them), expansion of the agricultural sector, urban development, and construction of roads and dams (IWGIA, 2004; Molebatsi, 2019; Mbaiwa, 2023).

Based on the economic modelling results, it is not likely that the EPA has had a significant impact on the land rights of indigenous peoples. The EPA's impact on production in the mining and minerals sectors as well as construction has been marginal. Production in agricultural sectors expanded modestly (below 0.5%), except the "other crops" sector which has increased by 1% as a result of the EPA. Moreover, an increase in production in these sectors does not necessarily mean an impact on the land use and violation of land rights. So far, the environmental analysis has not found an increase in land use in Botswana (see chapter 7 of the main report). No further evidence of an impact of the EPA on the land rights of indigenous peoples has been identified.

2. ESWATINI

The analysis of the economic modelling results per sector allows to look at the possible impact of the EPA on specific human rights in Eswatini. The preliminary findings of this analysis are presented in Table 2.¹⁰⁵

Table 2: Overview of human rights that may have been affected by the EU-SADC EPA in Eswatini¹⁰⁶

Human right/normative framework	Type of impact	Scale/direction of impact	Potentially affected vulnerable population groups
Right to an adequate standard of living (UDHR, Art. 25; ICESCR, Art. 11; CESCR General Comments No. 4, 7, 12, 15 & 19; CFR, Art. 34)	Direct	Minor (+/-)	Workers from sectors affected by employment changes, especially workers from such vulnerable groups as women, persons with disabilities, migrant workers, children.
Right to food (UDHR, Art. 25; ICESCR, Art. 11; CESCR General Comment No.12; ACHPR/Res.431(LXV)2019)	Indirect	Minor	
Right to water (UDHR, Art. 25; ICESCR, Art.11; CESCR General Comment No.15; ACHPR Guidelines on the Rights to Water in Africa; CEDAW, Art. 14(2); CRC, Art. 24(2))	Indirect	Minor (+/-)	Populations living in proximity to water-polluting/water-intensive economic activities (populations in the Shiselweni and Lumbombo regions)
Right to join and form trade unions (incl. right to collective bargaining) (UDHR, Art. 20; ICCPR, Arts. 21 & 22; CFR, Art. 12; ILO Conventions 87 & 98)	Direct	No impact	
Right to just and favourable conditions of work (UDHR, Arts. 23 & 24; ICESCR, Arts. 6 & 7; CESCR General Comment No.23; CEDAW, Art, 11; CRPD, Art. 27; CFR, Arts. 15 & 31; ACHPR, Art. 15)	Direct	No impact	
Freedom from discrimination (UDHR, Art.2; ICCPR, Art. 26; ILO Conventions 100 & 111)	Direct	No impact	

¹⁰⁵ The analysis is based on scenario A of the economic modelling, which compares the EPA with a situation in which the TDCA would have continued to be applied. Tables showing the production and labour effects of the EPA for scenario B, which compares the EPA with a situation in which the Parties would have traded under WTO (MFN) rules, are provided in appendices B2 and C2.

¹⁰⁶ The table does not include rights where initial desk research indicated no effect by the EPA.

Human right/normative framework	Type of impact	Scale/direction of impact	Potentially affected vulnerable population groups
Freedom from slavery and forced labour, incl. child labour (UDHR, Art. 4; ICCPR, Art. 8; ILO Conventions 29 & 105, 138 & 182, Protocol 029; CFR, Art. 5; CRC; ACHPR, Art. 5)	Direct	No impact	
Right to participate in public affairs (ICCPR, Art. 25; HRC General Comment No. 25)	Direct	No impact	
Women's rights (gender equality) (CEDAW; ICCPR & ICESCR, Art.2; Protocol to the ACHPR on the Rights of Women in Africa (Maputo Protocol))	Direct	Minor (-)	Women working in textile and garment sectors in Eswatini

Source: own compilation.

2.1. Right to an adequate standard of living

The impact of the EU-SADC EPA on the right to an adequate standard of living in Eswatini could have materialised through the overall effects of the EPA on welfare, GDP and wages, as well as sectoral employment changes.

The overall impact of the EPA on GDP and wages in Eswatini has been limited (see sections 5.4.1 and 6.1 of the main report). The modelling results show a decrease of real GDP by 0.48% and wages by 0.19% for skilled workers and 0.13% for unskilled workers, and a zero impact on economic welfare, suggesting an overall marginal impact on the right to an adequate standard of living.

At sector level, minor positive employment changes in the coal (1.2% increase in employment for skilled workers and 1% for unskilled workers), wood and products (0.6% increase for both categories of workers), chemicals (0.7% increase for both categories of workers), and metal products (0.8% increase for both categories of workers) suggest a minor positive impact on the right to an adequate standard of living for workers in these sectors.

Conversely, minor negative employment changes in the textiles (-1.7% for skilled workers and -1.8% for unskilled workers) and wearing and apparel (-6.1% for skilled workers and 6.2% for unskilled workers) sectors suggest a minor negative impact on the right to an adequate standard of living of workers from these sectors, especially if these find it difficult to move to other sectors.

2.2. Right to food

In 2021, approximately 58.9% of Eswatini persons lived below the national poverty line, with the highest poverty in the rural areas of Lubombo and the Shiselweni regions (United Nations, 2021). Prolonged droughts in the last 10 years affected food security. About 26% of children under five are affected by chronic malnutrition (WFP, 2023), and vulnerable groups rely on the World Food Programme (WFP) and other donors to provide household food rations (Bertelsmann Foundation, 2022). Without charity organisations, food insecurity would be considerably worse.

The economic modelling results point to no significant changes in production in agricultural sectors resulting from the EU-SDC EPA. While the simulation results show small production increases across all agricultural sectors, Eswatini remained a net food importer. According to recent reports of the WFP, the vulnerable population of Eswatini continues to rely on food programmes (WFP, 2022). No further impact of the Agreement has been identified on this right in Eswatini.

2.3. Right to water

The impact of the EU-SADC EPA on the right to water in Eswatini could have materialised through an increase or decrease in production in water-intensive and water-polluting economic sectors (such as coal, textile, wearing and apparel, and others), affecting the availability and quality of water, two criteria from the AAAQ framework defined in the CESCR General Comment No. 15 on the right to water.¹⁰⁷

Eswatini faces multiple environmental challenges, mainly land degradation, inadequate quantity and quality of water resources, air pollution, habitat destruction and loss of biodiversity, waste (including toxic waste), natural hazards (mainly recurring droughts) and climate change (including rainfall variability) (WFP, 2022). Prolonged droughts strain water resources and impact water availability for communities and agriculture. Access to water and sanitation is not consistent, and in rural areas access to potable drinking water remains a challenge, especially in dry places in the mountains (Bertelsmann Foundation, 2022).

A small increase in the production of coal (by 0.7%) could have had a minor negative impact on the availability and quality of water. Coal mining can be water-intensive, as water is often used for activities such as dust suppression and coal washing. Moreover, coal mining and processing can lead to water pollution as runoff from coal mines can contain various contaminants, including heavy metals and pollutants, which can seep into local waterways and negatively affect water quality (Yiwei, 2019). The coal sector is not very big in Eswatini but has recently been revived. It is primarily centred in the western part of the country, specifically in the Shiselweni Region, a region with high levels of poverty. More recently, the Mpaka Coal Mine in the Lumbombo region (also a region with high levels of poverty) has been opened (WhyAfrica, 2021). So while the overall impact is minor, it may have had disproportionate effects on the most vulnerable population groups.

The calculated decrease in production in the textile (-1.8%) and apparel (-6.2%) sectors in Eswatini could have led to a minor positive impact on the right to water of communities living in the proximity to production sites. This is despite the fact that textiles (directly9 destined to the EU market constitute a small share of all the textiles produced in the country, with 98% of exports going to South Africa (World Bank, 2021). Similarly, the limited increase in production in the chemicals sector (by 0.7%) is not likely to have led to a substantial impact on the right to water.

2.4. Labour rights (right to just and favourable conditions of work, right to join and form trade unions, incl. the right to collective bargaining, freedom of discrimination at work)

Despite some employment changes triggered by the EPA, it is not likely that this has led to a significant impact on labour rights in Eswatini. According to the 2023 ITUC Global Rights Index, Eswatini has consistently over the years been among the ten worst countries in the world for working people (ITUC, 2023). In the context of a broader cooperation with Eswatini, the EU has launched a programme to support the implementation of the EU-SADC EPA and to promote job creation in Eswatini through the promotion of public private dialogue which could have played a role in promoting labour rights in the country. The programme contained targeted actions to address shortage of skilled labour and empower youth in vulnerable situations “through basic training, informal learning and economic empowerment” (European Commission, 2021). However, the programme has no direct focus on labour rights.

¹⁰⁷ The right to water is also related to the right to the highest attainable standard of health (Art. 12 (1) ICESCR) and the rights to adequate housing and adequate food (Art. 11(1) ICESCR).

2.5. Prohibition of slavery and forced labour, incl. child labour

Forced labour and child labour in Eswatini are reported to be common in raising and herding livestock (including cattle, buffalo, goats, swine, horses, and sheep), domestic work, and street work (US Department of Labor, 2022a). Eswatini has ratified all key international conventions concerning child labour (the ILO Conventions No. 138 & 182, the CRC and two of its Optional Protocols, and the Palermo Protocol on Trafficking in Persons). The Government has also introduced related laws and regulations. However, a key gap in Eswatini's legal framework refers to the lack of a compulsory education age that would be consistent with the minimum age of work. Enforcement of the legal framework on child labour is hindered by insufficient human and financial resources (US Department of Labor, 2022a).

Based on the results of the economic modelling undertaken, the EPA has not affected sectors in which forced labour and child labour have been identified: the production increase in the cattle sector amounted to 0.01%. No other causal links have been identified between child labour incidence and the EPA in Eswatini.

2.6. Right to participate in public affairs

Eswatini lacks laws regarding the access to information, and "there is no culture of proactive disclosure of government information" (Freedom House, 2022). Transparency has been reduced even more since the adoption of the Public Service Act in 2018. Section 8 of the Act bans public officials from providing public information to the media without express permission by the Secretary of the Cabinet (MISA, 2018).

While the EPA's TSD Chapter does not extensively address civil society participation in the implementation of the Agreement, the inclusion of stakeholders is encouraged under Article 10 (see analysis of this right in Botswana above).

Stakeholders interviewed by the evaluation team noted that awareness about the Agreement has been very low. They encouraged the creation of a dedicated mechanism that would put Government, private sector, and civil society at one table to ensure sustainable and inclusive trade. So far, the potential to increase civil society participation and involvement in decision-making processes regarding TSD under the EPA has not been actively used.

2.7. Women's rights

The 2022 World Economic Forum Global Gender Gap Index reports that Eswatini almost closed its gender gap on educational attainment, and that the country has high scores related to economic participation of women and their access to healthcare. The political empowerment score has however remained very low since 2017, as women continue to be underrepresented in the Government and in decision-making positions (WEF, 2023). Gender-based violence and domestic violence remain matters of concern, and women face discrimination at work and have challenges to retain and exercise their rights to land (US Department of State, 2022a).

An impact of the EPA on women could have materialised through increases or decreases in employment in sectors that employ high shares of female workers, which can affect their jobs and income, as well as access to social protection. In some cases, factories facing economic challenges may reduce wages as a cost-cutting measure and exacerbate existing gender wage gaps and make it more difficult for women to support themselves and their families.

An important employer of women in the country is the textile and garments sector. Textile and garment factories are located mainly in the Matsapha Industrial Estate, which is the

main business hub in Eswatini. Some factories are also present in Nhlanguano and Siphofaneni. The textile industry had been under pressure for years before the application of the EPA, linked primarily to the expiry of the Agreement on Clothing and Textiles in 2004. In 2005, the total number of jobs recorded in the sector dropped to approximately 11,500, compared to 30,000 in 2004 (Madonsela, 2006). Since then, the sector recovered somewhat: in 2020, 20 textile companies in Eswatini employed about 22,000 people, more than 80% of them being women (United Nations, 2020). Nevertheless, jobs in this sector are generally of poor quality (IndustriAll, 2018).

The economic modelling results indicate a negative effect on labour in the textile (-1.8% for unskilled workers and -1.7% for skilled workers) and apparel sectors (-6.2% for skilled workers and -6.1% for unskilled workers), despite the limited importance of direct exports to the EU from the sector: about 98% of all textile exports from Eswatini go to South Africa, and only very small share of textile products reaches such EU states as Austria, Germany, Italy, France, Portugal and the Netherlands (World Bank, 2021). Some sources say that textile exports to the EU are “almost non-existent” (Times of Swaziland, 2023). Because the textile and garments sectors employ a high share of female workers, this loss in employment is likely to affect women more than men.

3. LESOTHO

The analysis of the economic modelling results per sector allows to look at the possible impact of the EPA on specific human rights in Lesotho. The preliminary findings of this analysis are presented in Table 3.¹⁰⁸

Table 3: Overview of human rights that may have been affected by the EU-SADC EPA in Lesotho¹⁰⁹

Human right/normative framework	Type of impact	Scale/direction of impact	Potentially vulnerable groups affected population
Right to an adequate standard of living (UDHR, Art. 25; ICESCR, Art. 11; CESCR General Comments No. 4, 7, 12, 15 & 19; CFR, Art. 34)	Direct	Minor (+/-)	Workers from sectors affected by employment changes, especially workers from such vulnerable groups as women, children, persons with disabilities, migrant workers
Right to food (UDHR, Art. 25; ICESCR, Art. 11; CESCR General Comment No.12; ACHPR/Res.431(LXV)2019)	Indirect	Minor	
Right to water (UDHR, Art. 25; ICESCR, Art.11; CESCR General Comment No.15; ACHPR Guidelines on the Rights to Water in Africa; CEDAW, Art. 14(2); CRC, Art. 24(2))	Indirect	Minor (+/-)	Populations living in proximity to water-polluting/water-intensive economic activities
Right to join and form trade unions (incl. right to collective bargaining) (UDHR, Art. 20; ICCPR, Arts. 21 & 22; CFR, Art. 12; ILO Conventions 87 & 98)	Direct	No impact	
Right to just and favourable conditions of work (UDHR, Arts. 23 & 24; ICESCR, Arts. 6 & 7; CESCR General Comment No.23; CEDAW, Art. 11; CRPD, Art. 27; CFR, Arts. 15 & 31; ACHPR, Art. 15)	Direct	No impact	
Freedom from discrimination (UDHR, Art.2; ICCPR, Art. 26; ILO Conventions 100 & 111)	Direct	No impact	

¹⁰⁸ The analysis is based on scenario A of the economic modelling, which compares the EPA with a situation in which the TDCA would have continued to be applied. Tables showing the production and labour effects of the EPA for scenario B, which compares the EPA with a situation in which the Parties would have traded under WTO (MFN) rules, are provided in appendices B2 and C2.

¹⁰⁹ The table does not include rights where initial desk research indicated no effect by the EPA.

Human right/normative framework	Type of impact	Scale/direction of impact	Potentially vulnerable groups	affected population
Freedom from slavery and forced labour, incl. child labour (UDHR, Art. 4; ICCPR, Art. 8; ILO Conventions 29 & 105, 138 & 182, Protocol 029; CFR, Art. 5; CRC; ACHPR, Art. 5)	Direct	No impact		
Right to participate in public affairs (ICCPR, Art. 25; HRC General Comment No. 25)	Direct	No impact		
Women's rights (gender equality) (CEDAW; ICCPR & ICESCR, Art.2; Protocol to the ACHPR on the Rights of Women in Africa (Maputo Protocol))	Direct	Minor (+/-)	Women working in textile and garment sectors in Lesotho	

Source: own compilation.

3.1. Right to an adequate standard of living

Employment and income are critical factors that contribute to an individual's ability to enjoy an adequate standard of living. Workers in negatively affected sectors may be made redundant, which may affect their ability to pay for housing, food, and health care, or to cover other expenditures of their families which are necessary for a dignified life, as defined in Article 25 of the UDHR and Article 11 of the ICESCR.

The impact of the EU-SADC EPA on the right to an adequate standard of living in Lesotho could have materialised through the overall effects of the EPA on welfare, GDP and wages, as well as sectoral employment changes.

The overall impact of the EPA on welfare, GDP, and wages in Lesotho has been positive. The economic modelling finds that real GDP for Lesotho has improved by 0.14% (more than in any of the SADC EPA States), real wages increased by 1.1% for both skilled and unskilled workers, and economic welfare increased by €2 million. Taken together, these results suggest a small positive impact on welfare and the right to an adequate standard of living overall.

At sector level, small positive employment changes in the textiles (1.7% for both skilled and unskilled workers) and fibres crops (0.6% for both categories of workers) sectors suggest a minor positive impact on the right to an adequate standard of living for workers in these sectors. Conversely, small negative employment changes in the apparel and leather sectors (by 1.3% and 1.9% respectively, for both categories of workers) suggest a minor negative impact on the right to an adequate standard of living of workers from these sectors.

3.2. Right to food

While the national poverty rate in Lesotho declined from 56% in 2002 to 49% in 2017, and food poverty rates also declined from 34% to 24% over the same period, the Integrated Food Security Phase Classification reports that, in the current period (from July to September 2023), approximately 245,000 persons from rural areas in Lesotho face high levels of acute food insecurity (IPC, 2023). An estimated 75% of the population are either poor or vulnerable (Bertelsmann Foundation, 2022a). Poverty is particularly acute in the mountainous areas and other remote areas (United Nations, 2019; 2019a). According to a 2021 World Bank report, the geographical characteristics of Lesotho make it vulnerable to the impacts of climate change. Negative effects of climate change come from the increased frequency of droughts, increased rates of soil erosion and desertification, and reduced soil fertility, which negatively affects agricultural activities vital for food security and livelihoods (World Bank Group, 2021).

The economic modelling results point to no significant changes in the production of agricultural sectors in Lesotho due to the EU-SDC EPA. While very small production

increases are calculated by the modelling across all agricultural sectors, with the most prominent increase, of 0.6%, in fibres crops, Lesotho remained a net food importer. According to the African Development Bank, about 80% of the food consumed in Lesotho is imported (African Union, 2023). No further impact of the Agreement has been identified on this right in Lesotho. The EU continued, however, to support Lesotho as one of the main donors to the World Food Programme, bringing the total contributions to €7 million in the period from 2017-2021 (EEAS, 2021).

3.3. Right to water

The impact of the EU-SADC EPA on the right to water in Lesotho could have materialised through an increase or decrease in production in water-intensive and water-polluting economic sectors (such as textiles, wearing and apparel, leather, and others), affecting the availability and quality of water, two criteria from the AAAQ framework defined in the CESCR General Comment No. 15 on the right to water.¹¹⁰

Water availability has improved due to the Lesotho Highlands Water Project. However, the World Development Indicators show that only 42.75% of Lesotho's population used at least basic sanitation services. A total of 68.65% of the population use basic drinking water services (Bertelsmann Foundation, 2022a).

The economic modelling results show a minor increase in production (by 1%) in the water-intensive and water-polluting textile sector as a result of the EU-SADC EPA. At the same time, other water-intensive and water-polluting sectors, such as apparel and leather, have faced a decrease in production (by 1.5 and 1.9% respectively). Lesotho garment companies specialise in the production of denim garments – mostly jeans – which requires a large amount of potable water. The MNN (Centre for Investigative Journalism) reports that some of Lesotho's textile factories try to cut operating costs and release toxic wastewater into water courses, including the Mohokare/Caledon River (MNN, 2023).

Due to the mixed effect of the EPA on production in these water-polluting economic sectors and a relatively small degree of the impact, it is not likely that economic activities under the EPA contributed to a significant impact on the right to water in Lesotho.

3.4. Labour rights (right to just and favourable conditions of work, right to join and form trade unions, incl. the right to collective bargaining, freedom of discrimination at work)

Employment changes triggered by the EPA, in particular loss of employment (primarily in apparel and leather), could be associated with additional pressure on the rights of workers in the affected sectors. However, it is not likely that these changes have led to a significant impact on labour rights in Lesotho due to the limited magnitude of the impact identified by the modelling. The ITUC Global Rights Index for Lesotho deteriorated in 2022, following the killing of trade unionists (ITUC, 2022), and remained low for 2023, indicating systematic violations of labour rights in the country (ITUC, 2023). Major incidents were reported in the garment industry in Lesotho, where women face gender-based violence and harassment (Solidarity Center, 2022).

In 2019, Lesotho ratified the Protocol to the Forced Labour Convention. In March 2023, the Government of Lesotho deposited the instruments of ratification of three ILO conventions: the Labour Relations (Public Service) Convention (No. 151), the Promotional Framework for Occupational Safety and Health Convention (No. 187), and the Violence and Harassment Convention (No. 190). These conventions will enter into force for Lesotho in

¹¹⁰ The right to water is also related to the right to the highest attainable standard of health (Art. 12 (1) ICESCR) and the rights to adequate housing and adequate food (Art. 11(1) ICESCR).

March 2024. While these are major developments regarding labour rights, the implementation of these instruments still remains to be seen, and there is no evidence that the ratification process was driven by the EPA.

3.5. Prohibition of slavery and forced labour, incl. child labour

Child labour in Lesotho is reported to be common in the cattle sector (herding animals), farming (including planting, applying pesticides, and harvesting), domestic work, street work, and as a result of commercial sexual exploitation (UNICEF, 2021; US Department of Labor, 2022b). Lesotho has ratified all key international conventions concerning child labour (the ILO Conventions No. 138 & 182, the CRC and two of its Optional Protocols, and the Palermo Protocol on Trafficking in Persons). The Government has introduced related laws and regulations. However, a key gap in the legal framework of Lesotho refers to the low compulsory education age, which makes children aged 14 and more vulnerable to child labour because they are not required to go to school by law. Enforcement of the legal framework on child labour is hindered by insufficient human and financial resources (US Department of Labor, 2022b).

Based on the results of the economic modelling, the EPA did not have a significant impact on the sectors where child labour had been found. No other causal links have been identified between child labour incidence and trade under the EPA in Lesotho.

3.6. Right to participate in public affairs

Lesotho lacks laws regarding the access to information (United Nations, 2019). Only selected public documents are publicly available. Government procurement decisions and tenders cannot be accessed online (Freedom House, 2022a).

While the EPA's TSD chapter does not extensively address civil society participation in the implementation of the Agreement, the inclusion of stakeholders is encouraged under Article 10 (see analysis of this right in Botswana). Stakeholders consulted by the evaluation team noted that awareness about the Agreement has been very low and encouraged the creation of a dedicated mechanism that would put Government, private sector, and civil society at one table to ensure sustainable and inclusive trade. So far, the potential to increase civil society participation and involvement in decision making-processes regarding TSD under the EPA has not been actively used.

3.7. Women's rights

The 2022 World Economic Forum Global Gender Gap Index indicates that Lesotho closed its gender gap on educational attainment and almost closed its gender gap on health and survival indicators. The political empowerment score has remained very low since 2017, as women continue to be underrepresented in government and in decision-making positions. When it comes to wages for similar work, Lesotho is one of the lowest-ranking countries in this dimension (WEF, 2023). Gender-based violence and domestic violence continue to rise, but in August 2022 the Counter Domestic Violence Act entered into force, which aims to protect the rights of all citizens in domestic relations including children, who are victims of all forms of abuse. Women "continued to be excluded from participation in the economy and politics, and suffered the triple burden of poverty, unemployment and inequality" (Amnesty International, 2023). Violations of their rights have been reported across economic sectors but also in specific sectors. According to trade unions, women working in the textile sector were only provided six weeks of paid maternity leave instead of the 12 weeks stipulated by law (US Department of State, 2022b).

An impact of the EPA on women could have materialised through an increase or decrease in employment in sectors that employ a high share of female workers, e.g. textiles and wearing and apparel, which can affect their jobs and income, as well as access to social

protection. In some cases, factories facing economic challenges may reduce wages as a cost-cutting measure and exacerbate existing gender wage gaps and make it more difficult for women to support themselves and their families.

In 2017, the combined textile, apparel, and footwear manufacturing industry in Lesotho employed around 46,500 workers (Tralac, 2017). Most of its textile exports go to Belgium, South Africa and the United States (IMF, 2022). The textile and apparel sector is the most important source of employment and a key employer of women, who account for 80% of all textile workers in Lesotho (CBS, 2019; Mari-Nelly & Baskaran, 2021).

The economic modelling results point to an increase in employment in the textiles sector (1.7% for both skilled and unskilled workers) and loss of jobs in the wearing and apparel sector (-1.3%). Both sectors employ a high share of female workers. More detailed data disaggregated by sector could not be identified at this stage. Based on the analysis undertaken to date, we preliminarily find that the EPA has had a mixed impact on women. Because the textiles and apparel sectors are related industries that are involved in the production of clothing and textiles, women are likely to move jobs rather than lose them. However, depending on the production processes and tasks involved, there may also be distinct differences in the skills required for these two sectors. For example, skills in the textile sector include knowledge about the properties of different fabrics, knowledge of chemicals and dyes, their properties, application methods, and safety precautions. Skills in the wearing and apparel sector include skills in sewing, design and fashion.

4. MOZAMBIQUE

The analysis of the economic modelling results per sector allows to look at the possible impact of the EPA on specific human rights in Mozambique. The preliminary findings of this analysis are presented in Table 4.¹¹¹

Table 4: Overview of human rights that may have been affected by the EU-SADC EPA in Mozambique¹¹²

Human right/normative framework ¹¹³	Type of impact	Scale/direction of impact	Potentially affected vulnerable population groups
Right to an adequate standard of living (UDHR, Art. 25; ICESCR, Art. 11; CESC General Comments No. 4, 7, 12, 15 & 19; CFR, Art. 34)	Direct	Minor (+/-)	Workers from sectors affected by employment changes, especially workers from vulnerable population groups
Right to food (UDHR, Art. 25; ICESCR, Art. 11; CESC General Comment No.12; ACHPR/Res.431(LXV)2019)	Indirect	Minor	
Right to water (UDHR, Art. 25; ICESCR, Art.11; CESC General Comment No.15; ACHPR Guidelines on the Rights to Water in Africa; CEDAW, Art. 14(2); CRC, Art. 24(2))	Indirect	Minor	
Right to join and form trade unions (incl. right to collective bargaining) (UDHR, Art. 20; ICCPR, Arts. 21 & 22; CFR, Art. 12; ILO Conventions 87 & 98)	Direct	No impact	
Right to just and favourable conditions of work	Direct	No impact	

¹¹¹ The analysis is based on scenario A of the economic modelling, which compares the EPA with a situation in which the TDCA would have continued to be applied. Tables showing the production and labour effects of the EPA for scenario B, which compares the EPA with a situation in which the Parties would have traded under WTO (MFN) rules, are provided in appendices B2 and C2.

¹¹² The table does not include rights where initial desk research indicated no effect by the EPA.

¹¹³ Mozambique has not ratified the ICESCR.

Human right/normative framework ¹¹³	Type of impact	Scale/direction of impact	Potentially affected vulnerable population groups
(UDHR, Arts. 23 & 24; ICESCR, Arts. 6 & 7; CESCR General Comment No.23; CEDAW, Art, 11; CRPD, Art. 27; CFR, Arts. 15 & 31; ACHPR, Art. 15)			
Freedom from discrimination (UDHR, Art.2; ICCPR, Art. 26; ILO Conventions 100 & 111)	Direct	No impact	
Freedom from slavery and forced labour, incl. child labour (UDHR, Art. 4; ICCPR, Art. 8; ILO Conventions 29 & 105, 138 & 182, Protocol 029; CFR, Art. 5; CRC; ACHPR, Art. 5)	Direct	Minor possible impact	Children working in the tobacco sector in Mozambique
Right to participate in public affairs (ICCPR, Art. 25; HRC General Comment No. 25)	Direct	No impact	
Women's rights (gender equality) (CEDAW; ICCPR & ICESCR, Art.2; Protocol to the ACHPR on the Rights of Women in Africa (Maputo Protocol))	Direct	No impact	
Right to own property (land rights) (UDHR, Art. 17; CFR, Art. 17; ACHPR, Art. 14)	Indirect	Minor	Local communities living in the proximity to extraction sites

Source: own compilation.

4.1. Right to an adequate standard of living

Employment and income are critical factors that contribute to an individual's ability to enjoy an adequate standard of living. Workers in negatively affected sectors may be made redundant, which may affect their ability to pay for housing, food, and health care, or to cover other expenditures of their families which are necessary for a dignified life, as defined in Article 25 of the UDHR and Article 11 of the ICESCR.

The impact of the EU-SADC EPA on the right to an adequate standard of living in Mozambique could have materialised through the overall effects of the EPA on welfare, GDP and wages, as well as sectoral employment changes.

The overall impact of the EPA on GDP and wages in Mozambique is positive. The economic modelling analysis finds that real GDP for Mozambique improved by 0.11%, the highest change among the six SADC EPA States, and wages have increased by 0.3% for skilled workers and by 0.4% for unskilled workers; however, due to price effects, economic welfare marginally decreased (by €10 million). Taken together, these indicators suggest a small positive impact on welfare and the right to an adequate standard of living overall.

At sector level, limited positive employment changes in the coal (0.6% for skilled workers and 0.9% for unskilled workers), oil (0.6% for skilled workers and 0.5% for unskilled workers), gas (0.7% for both categories of workers), beverages and tobacco products (0.5% for both categories of workers), and leather sectors (0.6% for both categories of workers) suggest a minor positive impact on the right to an adequate standard of living for workers in these sectors.

In contrast, small negative employment changes in the wheat (-0.6% for both categories of workers), ruminant meat (-1.6% for both categories of workers), other meat (-9.0% for both categories of workers), dairy products (-1.5% for both categories of workers), paper and paper products (-1.9% for skilled workers and -1.8% for unskilled workers), and rubber and plastics products (-1.3% for both categories of workers) suggest a minor negative impact on the right to an adequate standard of living of workers in these sectors, if they cannot find jobs in other sectors. It should be noted that the share of labour of the most affected sector by far, "other meat" (i.e. non-ruminant meat), amounts to only 0.03% of total labour in the country (see Table 5 in Appendix C2).

4.2. Right to food

While the national poverty rate in Mozambique declined from 51.7% in 2008 to 46.1% in 2014 (World Bank, 2023), nearly half of the population remains below the poverty line (WFP, 2023a). A recent country brief of the World Food Programme states that Mozambique is classified as one of the countries in the world most affected by extreme weather hazards. Acute food insecurity has been on the rise in recent years in northern Mozambique due to conflict and recurring displacement and economic and climate related shocks (WFP, 2023a). The latest Integrated Food Security Phase Classification reports that in the period from November 2022 to March 2023, approximately 3.15 million people in Mozambique were in need of urgent action (IPC, 2023a). Around 38% of children suffer from chronic malnutrition (IFAD, 2023).

The economic modelling results point to no significant changes in production in agricultural sectors in Mozambique as a result of the EU-SDC EPA. Production of agricultural products either did not change or faced a marginal decrease. The most prominent decrease is calculated by the model for the production in the wheat sector (-0.9%). According to the International Fund for Agricultural Development, a specialised agency of the United Nations, Mozambique remains a net importer of food (IFAD, 2023). No further impact of the Agreement has been identified on this right in Mozambique. The EU continued to support the World Food Programme's Mozambique operations as a donor and contributed over €52 million since 2018 to help alleviate hunger. In 2023, the EU contributed €8.6 million to intensify efforts in addressing food security amidst conflict in northern Mozambique (WFP, 2023b).

4.3. Right to water

The impact of the EU-SADC EPA on the right to water in Mozambique could have materialised through an increase or decrease in production in water-intensive and water-polluting economic sectors (such as paper and paper products, ruminant and other meat, and others), affecting the availability and quality of water, two criteria from the AAAQ framework defined in the CESCR General Comment No. 15 on the right to water.¹¹⁴

Mozambique has overall sufficient surface and groundwater resources. However, water is not evenly available across Mozambique, and some regions in the southern part of the country have issues with water availability during times of drought. Regarding water quality, most water pollution in Mozambique comes from gold and coal mining, agriculture, and inadequate sanitation systems. Mozambique also faces transboundary pollution, as about 54% of its freshwater resources come from upstream countries (USAID SWP, 2021).

The results of the economic modelling do not indicate a significant increase in production in the most water-polluting economic sectors in Mozambique (gold and coal mining and agriculture) as a result of the EPA. Production in almost all agricultural sectors saw marginal changes in production. Production of minerals increased by 0.1% and production of coal by 0.4%. Other sectors that can also be water-intensive and water-polluting (ruminant meat, other meat, paper and paper products, rubber and plastics) all saw a decrease in production as a result of the EU-SADC EPA.

Overall, even a cumulative effect from decreased production in these sectors is not likely to lead to any significant impact of the EPA on the right to water in Mozambique, as reports indicate that the total volume of freshwater withdrawn by major economic sectors is only 1.75% (USAID SWP, 2021).

¹¹⁴ The right to water is also related to the right to the highest attainable standard of health (Art. 12 (1) ICESCR and the rights to adequate housing and adequate food (Art. 11(1) ICESCR).

4.4. Labour rights (right to just and favourable conditions of work, right to join and form trade unions, incl. the right to collective bargaining, freedom of discrimination at work)

Employment changes triggered by trade under the EPA, in particular loss of employment, could be associated with additional pressure on the rights of workers in these sectors (ruminant meat, other meat, dairy products, paper and paper products and rubber and plastics). However, a clear direct link with the EU-SADC EPA has not been identified yet.

The ITUC Global Rights Index ranks Mozambique as a country with regular violations of labour rights (ITUC, 2023). This ranking has not changed since the EPA came into force.

While the EPA's TSD chapter included provisions that referred to the commitments already made by the Parties under the ILO fundamental conventions, no specific improvements have been identified so far that could be linked to the EPA. Mozambique ratified several ILO conventions since the EPA started to be applied, such as the Protocol to the Forced Labour Convention (P029), the Safety and Health in Mines Convention (No. 176), and the Maritime Labour Convention (MLC, 2006). However, no evidence has been found yet that would link these developments to the EPA or trade with the EU.

4.5. Prohibition of slavery and forced labour, incl. child labour

Child labour in Mozambique is reported to be a serious issue in the tobacco sector and in artisanal mining (US Department of Labor, 2022c). Mozambique has ratified all key international conventions concerning child labour (the ILO Conventions No. 138 & 182, the CRC and two of its Optional Protocols, and the Palermo Protocol on Trafficking in Persons). The Government has introduced the related laws and regulations. However, the legal framework of Mozambique does not include minimum age protection for children without formal employment relationships (US Department of Labor, 2022c).

Based on the economic modelling results, the impact of the EPA on labour in the beverages and tobacco sector amounted to 0.5%, in a sector providing employment for 130,000-150,000 people (tobacco only). While no evidence has been identified to date to link these jobs to child labour, it cannot be excluded that child labour was used for the production of tobacco products exported under the EPA. Child labour incidences seem to be common across the whole sector, including companies exporting internationally. Some reports point that child labour (especially children of migrant workers) in the tobacco sector has been found also in supply chain of multinational tobacco companies (PMI, 2021) (see also social analysis). However, no specific evidence related to the use of child labour in economic activities under the EPA have been identified.

4.6. Right to participate in public affairs

A freedom of information law of Mozambique was adopted in 2014 (Law No. 34/2014) to protect and promote public participation, transparency, and proactive disclosure of information by both public and private institutions. However, reports state that in practice it is not easy to obtain government information, especially in Cabo Delgado Province (Freedom House, 2022a).

While the EPA's TSD Chapter does not extensively address civil society participation in the implementation of the Agreement, inclusion of stakeholders is encouraged under Article 10 (see analysis of this right for Botswana). Stakeholders interviewed noted that awareness about the Agreement has been very low and encouraged creation of a dedicated mechanism that would put Government, private sector, and civil society at one table to ensure sustainable and inclusive trade. So far, the potential to increase civil society participation and involvement in decision-making processes regarding TSD under the EPA has not been actively used.

4.7. Women's rights

The economic modelling results do not indicate any significant changes in economic sectors with a large share of female workers. As such, it is not likely that the EU-SADC EPA has significantly affected gender equality in Mozambique, either positively or negatively.

4.8. Land rights

Some reports point to the presence of "land grabbing" in Mozambique. Specifically, these practices are reported to be a matter of concern in the extractive sector, i.e. in such sectors as mining, oil, gas, coal (FOEI, 2020; 2022). However, incidents of land grabbing have also been reported in the paper and pulp industry that involved an EU-based paper producer (Environmental Paper Network, 2021).

According to the economic modelling results, production in the paper and paper products sector in Mozambique has declined by 2.2%, suggesting no impact on land grabbing from the activities in this sector triggered by the EPA. For the extractive sectors, while descriptive statistics of trade relations between the EU and Mozambique indicate an increase in bilateral trade in related economic sectors, the economic modelling results suggest no significant impact of the Agreement in these sectors. As a result of the EPA, the increase in production in the oil, coal and gas sectors amounted to 0.3%, 0.4% and 0.5% respectively, suggesting a possible minor impact. A 2020 report published by the Friends of the Earth International (FOEI) finds that gas projects in the Cabo Delgado province have contributed to more militarisation of the region, as the Government opted to protect gas infrastructure by mobilising more armed forces. The report states that:

"Nothing is being done to act on the root political and social causes of the conflict. On the contrary, the militarisation of the zone and the gas operations help feed the underlying tensions perpetuating the violence. Human rights violations are on the right, as the communities find themselves caught between the insurgents, the army, private security contractors and the gas companies and their subcontractors. Communities are being robbed of their lands, their access to sea and their livelihoods" (FOEI, 2020).

The report links operations in the region to the French company Total. In 2021, TotalEnergies declared force majeure and withdrew all Mozambique Liquefied Natural Gas (LNG) Project personnel from the Afungi site due to security concerns in the north of Cabo Delgado province (TotalEnergies, 2021).

5. NAMIBIA

The analysis of the economic modelling results per sector allows to look at the possible impact of the EPA on specific human rights in Namibia. The preliminary findings of this analysis are presented in Table 5.¹¹⁵

¹¹⁵ The analysis is based on scenario A of the economic modelling, which compares the EPA with a situation in which the TDCA would have continued to be applied. Tables showing the production and labour effects of the EPA for scenario B, which compares the EPA with a situation in which the Parties would have traded under WTO (MFN) rules, are provided in appendices B2 and C2.

Table 5: Overview of human rights that may have been affected by the EU-SADC EPA in Namibia¹¹⁶

Human right/normative framework	Type of impact	Scale/direction of impact	Potentially affected vulnerable population groups
Right to an adequate standard of living (UDHR, Art. 25; ICESCR, Art. 11; CESCR General Comments No. 4, 7, 12, 15 & 19; CFR, Art. 34)	Direct	Minor (+/-)	Workers from sectors affected by employment changes, especially workers from vulnerable population groups
Right to food (UDHR, Art. 25; ICESCR, Art. 11; CESCR General Comment No.12; ACHPR/Res.431(LXV)2019)	Indirect	Minor (+)	Vulnerable population groups affected by food insecurity
Right to water (UDHR, Art. 25; ICESCR, Art.11; CESCR General Comment No.15; ACHPR Guidelines on the Rights to Water in Africa; CEDAW, Art. 14(2); CRC, Art. 24(2))	Indirect	Minor (-)	Local communities in rural areas, communities living in the proximity to production sites
Right to join and form trade unions (incl. right to collective bargaining) (UDHR, Art. 20; ICCPR, Arts. 21 & 22; CFR, Art. 12; ILO Conventions 87 & 98)	Direct	No impact	
Right to just and favourable conditions of work (UDHR, Arts. 23 & 24; ICESCR, Arts. 6 & 7; CESCR General Comment No.23; CEDAW, Art. 11; CRPD, Art. 27; CFR, Arts. 15 & 31; ACHPR, Art. 15)	Direct	No impact	
Freedom from discrimination (UDHR, Art.2; ICCPR, Art. 26; ILO Conventions 100 & 111)	Direct	No impact	
Freedom from slavery and forced labour, incl. child labour (UDHR, Art. 4; ICCPR, Art. 8; ILO Conventions 29 & 105, 138 & 182, Protocol 029; CFR, Art. 5; CRC; ACHPR, Art. 5)	Direct	Minor possible impact	Children working in the fishing sector and in agriculture in Namibia
Right to participate in public affairs (ICCPR, Art. 25; HRC General Comment No. 25)	Direct	No impact	
Women's rights (gender equality) (CEDAW; ICCPR & ICESCR, Art.2; Protocol to the ACHPR on the Rights of Women in Africa (Maputo Protocol))	Direct	Minor (+)	Women working in agricultural sectors

Source: own compilation.

5.1.Right to an adequate standard of living

Employment and income are critical factors that contribute to an individual's ability to enjoy an adequate standard of living. Workers in negatively affected sectors may be made redundant, which may affect their ability to pay for housing, food, and health care, or to cover other expenditures of their families which are necessary for a dignified life, as defined in Article 25 of the UDHR and Article 11 of the ICESCR.

The impact of the EU-SADC EPA on the right to an adequate standard of living in Namibia could have materialised through the overall effects of the EPA on welfare, GDP and wages, as well as sectoral employment changes.

The overall impact of the EPA on welfare, GDP, and wages in Namibia has been positive. The economic modelling results show that the increase in real GDP is recorded at 0.07%, wages increased by 1.1% for unskilled workers and 0.3% for skilled workers, and economic welfare increased by €149 million, the second largest increase across all six SADC EPA States. This suggests a slightly positive impact on welfare and the right to an adequate standard of living overall.

¹¹⁶ The table does not include rights where initial desk research indicated no effect by the EPA.

At sector level, the EPA has had a wide-ranging (mostly positive) impact on employment. Results of the economic modelling indicate employment changes in almost all economic sectors in Namibia (covering 95% of value added). The most prominent positive changes (above 5%) occurred in the other grains (by 4.7% for skilled workers and by 5.2% for unskilled workers), vegetables, fruit and nuts (by 5.3% and 5.9% respectively), other crops (by 4.7% and 5.3%), fishing (by 5.1% and 5.7%), coal (by 12.8% and 10.7% - although this is a very small sector), ruminant meat (by 8.7% and 8.6%), and other prepared food sectors (10.1% and 10%). Creation of jobs in these sectors suggest a positive impact on the right to an adequate standard of living of the workers in these sectors.

Negative employment changes above 5% have been recorded in other transport equipment sector (-8.2% for skilled workers and 8.5% for unskilled workers), suggesting a negative impact on the right to an adequate standard of living of workers in this sector; however, based on information provided by stakeholders, the presence of this sector as represented in the CGE model might be erroneous; it has been stated that there is no transport equipment industry in the country to speak of, and accordingly the economic model findings for this sector might be a statistical artefact; further research into this is necessary.

5.2.Right to food

Namibia has been successful in reducing poverty, as the poverty rate halved from 1993 until 2016 (World Bank, 2021a). However, the projected international poverty rate remains high (18.4%) (World Bank, 2023), and many households remain food insecure (United Nations, 2021a; 2021b). According to the 2022 Global Hunger Index, Namibia suffers from a serious level of hunger (78th out of 116 countries) (WFP, no date). A recent update from the IPC (from September 2023) states that around 579,000 people in Namibia (22% of the total population) experience high levels of acute food insecurity (IPC, 2023a).

The economic modelling results show that production in agricultural sectors following the start of application of the EU-SDC EPA has increased in all agricultural sectors except the rice and the oil seeds sectors. Most prominent changes have been recorded in the other grains, vegetables fruit and nuts, and other crops sectors, marking 5%, 5.8% and 4.4% respectively. The FAO reports that the large domestic cereal outturns (other grain sector) in 2021 and 2022 have lessened the import needs in 2022 and 2023 (FAO, 2022). This suggests that increased production in agricultural sectors as a result of the EPA could have contributed to lower food insecurity in Namibia. Even though the prevalence of acute food security is expected to remain, this is not because of insufficient production but because of increased food prices and prices for fuel (FAO, 2022).

5.3.Right to water

The impact of the EU-SADC EPA on the right to water in Namibia could have materialised through changes in production in water-intensive and water-polluting economic sectors in agriculture (e.g. vegetables, fruit and nuts) or in mining of coal, affecting the availability and quality of water, two criteria in the AAAQ framework defined in the CDESCR General Comment No. 15 on the right to water.¹¹⁷

Namibia is highly susceptible to water scarcity (IFRC, 2022), and water resources are further vulnerable to pollution from mining and agricultural activities (JNCC & DEFRA, 2022). Mining operations can release pollutants into water bodies. Agricultural sectors use

¹¹⁷ The right to water is also related to the right to the highest attainable standard of health (Art. 12 (1) ICESCR and the rights to adequate housing and adequate food (Art. 11(1) ICESCR).

fertilisers, nitrates, and pesticides which can lead to runoff and leaching of chemicals into water sources. Moreover, both industries are also water intensive.

The economic modelling results show an increase in production both in mining and in agriculture because of the EPA. Coal mining has increased by 8.1%, but as noted above in actual fact the coal industry in Namibia is very small (GIZ, 2022). Therefore, the degree of the impact is likely to be minor or even negligible. Production in agricultural sectors has increased most in the wheat (by 3.5%), other grains (by 5%), vegetables, fruit and nuts (by 5.8%), and other crops (by 4.4%) sectors. The agricultural sectors that faced a decrease in production are the rice and the oil seeds sectors (by 1.2 and 1.6% respectively). While rainfall is an important source of water for agriculture, especially in the northern parts of the country, Namibian farmers also use other water sources, including groundwater and river water (Ihemba & Esterhuysen, 2020; GIZ, 2022). However, rainwater harvesting is also growing popularity among Namibian farmers (Chemonics, 2021). Overall, given the water footprint of agriculture in Namibia, increase in production in these sectors could have had a cumulative impact on water availability and water quality.

5.4. Labour rights (right to just and favourable conditions of work, right to join and form trade unions, incl. the right to collective bargaining, freedom of discrimination at work)

Namibia has a legal framework that includes a range of labour rights and protections – the law provides for the right to form and join trade unions, for the right to bargain collectively, to hold strikes. In some sectors (e.g. police), joining unions is not permitted by law. Namibia struggles with high levels of youth unemployment (especially in rural areas), and labour rights in the informal sector are often less protected (World Bank, 2021a; United Nations, 2021a). The 2023 ITUC Global Rights Index ranks Namibia as a country with regular violations of rights of workers, and its rating has deteriorated in 2022 (ITUC, 2023). Despite some employment changes triggered by the EPA, it is not likely that this has led to a significant impact on labour rights in Namibia.

While the TSD Chapter under the Agreement included provisions that referred to the commitments made by the Parties under the ILO fundamental conventions, no specific improvements have been identified so far that could be linked to the EPA. Namibia ratified several ILO conventions since the EPA started to be applied, such as the Protocol to the Forced Labour Convention (P029), the Labour Inspection Convention (No. 81), the Employment Policy Convention (No. 122), the Work in Fishing Convention (No. 188), the Domestic Workers Convention (No. 189), and the Violence and Harassment Convention (No. 190). However, now evidence could be found to date that would show a contribution of the EPA to these developments.

5.5. Prohibition of slavery and forced labour, incl. child labour

Child labour in Namibia has been reported in the farming sector, fishing, domestic work, street work, and in commercial sexual exploitation, sometimes as a result of human trafficking (US Department of Labor, 2022d). Namibia has ratified all key international conventions concerning child labour. The Government has also introduced related laws and regulations. However, one of the gaps in its legislation constitutes the lack of provisions that determine the number of hours that children between 14 and 18 are permitted to work (US Department of Labor, 2022d).

Based on the economic modelling results, the EPA has had a significant impact on the production and employment in agricultural sectors. Production and employment in the fishing sector has also increased. Production has increased by 5.6% and employment has increased by 5.1% for skilled workers and by 5.7% for unskilled workers. In a situation of increased demand in the sectors with forced or child labour, employers might have resorted to using more forced and child labour to meet that demand, especially if it is cheaper, and

labour protections are not sufficiently enforced. However, no other causal links have been identified yet between child labour incidence and trade under the EPA in Namibia.

5.6. Right to participate in public affairs

Namibia adopted the Access to Information Law (ATI) in 2022. However, in practice, there are difficulties in accessing some public information (Freedom House, 2023a). Domestic and international human rights organisations generally operate without restrictions from the Government (US Department of State, 2022d).

While the EPA's TSD Chapter does not extensively address civil society participation in the implementation of the Agreement, inclusion of stakeholders is encouraged in Article 10 (see analysis of this right for Botswana). However, non-state stakeholders interviewed by the evaluation team note that awareness for the Agreement has been very low. So far, the potential to increase civil society participation and involvement in decision making processes regarding TSD has not been actively used under the EPA.

5.7. Women's rights

The World Economic Forum Global Gender Gap Index Report states that Namibia has closed 80% of its gender gap and included the country in the list of top ten countries in the world regarding women's rights. Ranked 8th, Namibia has achieved full parity on both the health and survival and educational attainment indicators (subindexes), although the absolute levels of attainment are low for both women and men. On economic participation and opportunity, it is at 78% parity and holds the 19th rank globally. The score for the political empowerment indicator is the lowest of the four (WEF, 2023). Gender-based violence and domestic violence remain a matter of concern (United Nations, 2021a).

The impact of the EPA on women could have materialised through employment changes in sectors that employ a high share of female workers, such as agricultural sectors.

Agriculture is one the most important sectors in Namibia, as around 70% of the population (directly or indirectly) have their income and livelihood from working in agriculture (FAO, no date). The sector generates low-skilled jobs, oriented at youth and women, and provides livelihood for these vulnerable population groups (Kalimbo, 2023). Women are involved in crop cultivation, livestock farming, and subsistence farming. However, the sector is divided into two subsectors: commercial agriculture (capital intensive and fairly well developed) and subsistence agriculture (labour intensive and with limited resources and technology). Subsistence agriculture employs about 60% of the population and has limited access to markets. Commercial agriculture employs only 10% of the population and is export oriented (FAO, no date). An increase in employment due to the EPA is likely to have occurred in the commercial farming sector, leading to a direct but minor impact on women working in there, affecting their incomes and economic independence, and possibly improved access to resources such as healthcare and nutrition for themselves and their families, ultimately improving their overall wellbeing. The extent to which women workers in small-scale (subsistence) farming have benefited from the EPA will be addressed in a case study.

6. SOUTH AFRICA

The analysis of the economic modelling results per sector allows to look at the possible impact of the EPA on specific human rights in South Africa. The preliminary findings of this analysis are presented in Table 6.¹¹⁸

Table 6: Overview of human rights that may have been affected by the EU-SADC EPA in South Africa¹¹⁹

Human right/normative framework	Type of impact	Scale/direction of impact	Potentially affected vulnerable population groups
Right to an adequate standard of living (UDHR, Art. 25; ICESCR, Art. 11; CESCR General Comments No. 4, 7, 12, 15 & 19; CFR, Art. 34)	Direct	Minor (+/-)	Workers from sectors affected by employment changes, especially workers from vulnerable population groups
Right to water (UDHR, Art. 25; ICESCR, Art.11; CESCR General Comment No.15; ACHPR Guidelines on the Rights to Water in Africa; CEDAW, Art. 14(2); CRC, Art. 24(2))	Indirect	Minor (+/-)	Local communities in rural areas, communities living in the proximity to production sites.
Right to join and form trade unions (incl. right to collective bargaining) (UDHR, Art. 20; ICCPR, Arts. 21 & 22; CFR, Art. 12; ILO Conventions 87 & 98)	Direct	No impact	
Right to just and favourable conditions of work (UDHR, Arts. 23 & 24; ICESCR, Arts. 6 & 7; CESCR General Comment No.23; CEDAW, Art. 11; CRPD, Art. 27; CFR, Arts. 15 & 31; ACHPR, Art. 15)	Direct	No impact	
Freedom from discrimination (UDHR, Art.2; ICCPR, Art. 26; ILO Conventions 100 & 111)	Direct	No impact	
Freedom from slavery and forced labour, incl. child labour (UDHR, Art. 4; ICCPR, Art. 8; ILO Conventions 29 & 105, 138 & 182, Protocol 029; CFR, Art. 5; CRC; ACHPR, Art. 5)	Direct	No impact	
Right to participate in public affairs (ICCPR, Art. 25; HRC General Comment No. 25)	Direct	No impact	
Women's rights (gender equality) (CEDAW; ICCPR & ICESCR, Art.2; Protocol to the ACHPR on the Rights of Women in Africa (Maputo Protocol))	Direct	Minor (-)	Women working in the textiles and wearing and apparel sectors
Right to own property (land rights) (UDHR, Art. 17; CFR, Art. 17; ACHPR, Art. 14)	Indirect	Minor	Local communities

Source: own compilation.

6.1.Right to an adequate standard of living

Employment and income are critical factors that contribute to an individual's ability to enjoy an adequate standard of living. Workers in negatively affected sectors may be made redundant, which may affect their ability to pay for housing, food, and health care, or to cover other expenditures of their families which are necessary for a dignified life, as defined in Article 25 of the UDHR and Article 11 of the ICESCR.

¹¹⁸ The analysis is based on scenario A of the economic modelling, which compares the EPA with a situation in which the TDCA would have continued to be applied. Tables showing the production and labour effects of the EPA for scenario B, which compares the EPA with a situation in which the Parties would have traded under WTO (MFN) rules, are provided in appendices B2 and C2.

¹¹⁹ The table does not include rights where initial desk research indicated no effect by the EPA.

The impact of the EU-SADC EPA on the right to an adequate standard of living in South Africa could have materialised through the overall effects of the EPA on welfare, GDP and wages, as well as sectoral employment changes.

The overall impact of the EPA on welfare, GDP, and wages in South Africa has been limited. The economic modelling finds an increase in real GDP of 0.03%, an increase in wages (by 0.2% each for unskilled and skilled workers), and an increase in economic welfare by €293 million. This suggests a slightly positive impact on welfare and the right to an adequate standard of living overall.

At sector level, minor positive employment changes can be observed across most agricultural sectors – wheat (by 1.9% for both skilled and unskilled workers), other grains (by 1% for both categories of workers), vegetables, fruit and nuts (by 2.3% for both categories of workers), and cattle (by 2.1% for both categories of workers). The most prominent employment changes are found in the sugar sector where, as a result of the EPA, employment has increased by 6.3% for both categories of workers. In manufacturing, jobs were created in the motor vehicles and parts, and other transport equipment sectors (by 2.5% and 1.2% respectively, for both categories of workers). The creation of jobs in these sectors suggests a positive impact on the right to an adequate standard of living of the workers in these sectors.

On the other hand, minor negative employment changes in the textiles (-0.6% for both skilled and unskilled workers), apparel (-2.7% for both categories of workers), leather (-1.3% for both categories of workers), rubber and plastics products (-0.8% for both categories of workers) imply a minor negative impact on the right to an adequate standard of living of workers from these sectors, if they found it difficult to move to other sectors.

6.2.Right to water

The impact of the EU-SADC EPA on the right to water could have materialised through changes in production in water-intensive and water-polluting economic sectors, such as mining, textiles, apparel, leather, sugar, rubber and plastics products, motor vehicles and parts, and others.

South Africa has been facing water shortages since 2015 (DBSA, 2023). Water resources are scarce, and there is inequality in access to water and sanitation, especially for children, women, and marginalised communities living in rural areas (United Nations, 2022). During the UN Universal Periodic Review, stakeholders noted that mining companies tend to operate without a water-use licence and draw water from natural resources that are also providing water to communities (United Nations, 2022a), which sometimes leads to depletion of water resources for whole communities (Human Rights Watch, 2019).

The economic modelling results indicate a decrease in production in economic sectors related to mining due to the application of the EU-SADC EPA. This suggests that the negative impact on water from mining cannot be attributed to the EPA. Similarly, due to the decrease in production in the textiles (-0.8%), apparel (-2.8%), and leather (-1.4%) sectors, negative impacts from these sectors on water cannot be attributed to the EPA. An increase in production can be observed, however, in the sugar, automotive, vegetables, fruit and nuts, wheat, other grains, and cattle sectors (by 6.2%, 1.4%, 2.4%, 1.9%, 1% and 2.2% respectively). Given the size of the industries (Government of South Africa, 2022), their water footprint, and the degree of the impact from the EPA, a negative effect on water from increased activity in these sectors cannot be excluded; further research is needed in the remainder of the evaluation.

6.3. Labour rights (right to just and favourable conditions of work, right to join and form trade unions, incl. the right to collective bargaining, freedom of discrimination at work)

South Africa has a legal framework that includes a range of labour rights and protections, and the country has made significant strides in addressing labour issues and promoting workers' rights since the end of apartheid. South Africa's labour landscape is characterised by a mix of achievements and ongoing challenges. The Government, labour unions, employers, and civil society organisations engage in efforts to address these issues and promote decent work for all. South Africa struggles with high levels of unemployment, especially youth unemployment, and labour rights in the informal sector are often less protected (United Nations, 2022; 2022a). The 2023 ITUC Global Rights Index ranks South Africa as a country with repeated violations of rights of workers; this ranking has not changed since 2017 when the EPA started to be applied (ITUC, 2023). Despite some employment changes triggered by the EPA, it is not likely that this has led to a significant impact on labour rights in South Africa.

While the EPA's TSD chapter included provisions that referred to the commitments made by the Parties under the ILO fundamental conventions, no specific improvements have been identified so far that could be linked to the EPA. South Africa ratified several ILO conventions since the EPA's start of application, such as the Violence and Harassment Convention (No. 190) and amendments to the Maritime Labour Convention (MLC, 2006). However, no evidence could be found that these developments were influenced by the EPA or its implementation.

6.4. Prohibition of slavery and forced labour, incl. child labour

Child labour in South Africa is reported to be common in the farming sector (specifically in the production of maize and fruit), domestic work, and street work (US Department of Labor, 2022e). South Africa has ratified all key international conventions concerning child labour. The Government has introduced related laws and regulations and taken various measure to combat child labour. However, reports state that social programmes are not sufficient to address the scope of child labour (US Department of Labor, 2022e).

Based on the economic modelling results, trade under the EPA has had a minor impact on the production in such sectors as other grains (including maize) and vegetables, fruit and nuts, which increased by 1% and 2.4% respectively. No causal links have been identified between child labour incidence and trade under the EPA in South Africa. Moreover, stakeholders noted that strict mechanisms regarding the use of child labour are in place, and it is not likely that the EPA has contributed to the use of child labour.

6.5. Right to participate in public affairs

The South African Constitution guarantees the right to access to information (Section 32(1)) and requires that private institutions release information necessary for the exercise and protection of rights. The 2000 Promotion of Access to Information Act (PAIA) has introduced a framework for access to information procedures in both public and private entities to promote transparency and openness. However, in practice, the procedure of accessing information is laborious and bureaucratic (Freedom House, 2023b).

While the EPA's TSD chapter does not extensively address civil society participation in the implementation of the Agreement, the inclusion of stakeholders is encouraged under Article 10 (see analysis of this right for Botswana). Overall, civil society has been active in stakeholder consultations. However, stakeholders noted that the participation of civil society in the implementation of the Agreement has been limited, and encouraged the creation of a dedicated mechanism that would allow a more active participation of civil society to ensure sustainable and inclusive trade. So far, the potential to increase civil

society participation and involvement in decision-making process regarding TSD under the EPA has not been actively used.

6.6. Women's rights

The World Economic Forum Global Gender Gap Index indicates that South Africa almost closed its gender gap on educational attainment and health and survival indicators. Scores for the political empowerment and economic participation indicators are lower, but overall South Africa is ranked 20th out of 146 countries in the world, which is higher than the ranking of France or the Netherlands (WEF, 2023). Gender-based violence (GBV) and domestic violence persist, as South Africa has one of the highest rates of GBV in the world, while levels of prosecution and conviction remain low (Human Rights Watch, 2022).

In the absence of any particular provisions in the EPA on women and trade, the impact of the EPA on women could have materialised through changes in employment in sectors that employ high share of female workers, e.g. textiles and wearing and apparel.

Textiles are South Africa's third largest employer in the manufacturing sector (Embassy of South Africa in the Netherlands, 2023). The sector is an important employer of women; more than 26% of all female manufacturing workers work in the sector (Jenkin & Hattingh, 2022). The sector generates low-skilled jobs, oriented at youth and women, and provides livelihood for these vulnerable population groups.

A small decrease in employment in these sectors resulting from the EPA, as calculated in the economic modelling, suggests a minor but direct impact on women employed in this sector, affecting their incomes from these jobs and their livelihood.

6.7. Land rights (right to own property)

Land rights in South Africa have been a complex and contentious issue historically and continue to be a subject of debate and concern. Since the end of apartheid, South Africa has undertaken various measures and reforms to address land ownership and land rights disparities that were a legacy of the apartheid times (Kloppers & Pienaar, 2014).

South Africa has implemented land reform policies aimed at addressing historical injustices related to land ownership (Kloppers & Pienaar, 2014). However, despite these efforts, there have been challenges in the implementation of land reform programmes, and delays, disputes, and issues related to compensation and land use planning have been common. Some South Africans, particularly in rural areas, still lack secure land tenure, which leads to vulnerability, as these people may not have legal protection against eviction or access to productive land for farming. For instance, violations of the right to free, prior, and informed consent of indigenous peoples have been reported regarding land development (United Nations, 2022a), including large scale land acquisitions that often compromise customary subsistence practices (Neudert & Voget-Kleschin, 2021).

The economic modelling results and environmental analysis suggest a slightly increased land use as a result of production increases in the agricultural sectors. Based on this, the overall impact on land rights from the EPA is estimated to have been limited. Further analysis will be carried out by the evaluation team and be reported on in the draft final report.

APPENDIX F: LIST OF ENTITIES INTERVIEWED TO DATE

Organisation	Location
Agency for Investment and Export Promotion (APIEX)	Mozambique
Agri SA	South Africa
Agricultural Business Chamber (AGBIZ)	South Africa
Association de l'Aviculture, de l'Industrie et du Commerce de Volailles dans les Pays de l'Union Europeenne asbl	EU
Association of Producers and Exporters of Fish Products (AMAPIC)	Mozambique
Association of Meat Importers and Exporters South Africa (AMIE SA)	South Africa
Bank of Botswana	Botswana
Basotho Economic Development Corporation (BEDCO)	Lesotho
Botswana Exporters and Manufacturers Association	Botswana
Botswana Exporters and Manufacturers Association (BEMA)	Botswana
Botswana Institute for Development Policy Analysis (BIDPA)	Botswana
Botswana Investment and Trade Centre (BITC)	Botswana
Botswana Trade Commission (BOTC)	Botswana
Botswana Unified Revenue Services (BURS)	Botswana
Business Botswana (BB)	Botswana
Cape Wools SA	South Africa
Central Bank of Lesotho	Lesotho
Centre for Human Rights, University of Pretoria	South Africa
Chamber of Commerce of Mozambique	Mozambique
Citrus Growers' Association of South Africa (CGA)	South Africa
Citrus Growers' Association (CGA)	Eswatini
Customs Broker	Mozambique
Danish Agriculture & Food Council	Denmark
Department of Agriculture	Lesotho
Department of Agriculture, Land Reform and Rural Development (DALRRD)	South Africa
Department of Forestry, Fisheries and the Environment (DFFE)	South Africa
Department of Trade, Industry and Competition (the dtic)	South Africa
DG AGRI	EC
DG SANTE	EC
DG TAXUD	EC
DG TRADE - TDI	EC
DG TRADE Chief Economist Unit	EC
EESC	EU
Environmental Preservation Association (APMAM)	Mozambique
Eswatini Investment Promotion Agency (EIPA)	Eswatini
Eswatini Revenue Service (ERS)	Eswatini
Eswatini Sugar Association	Eswatini
EU Chamber of Commerce in Southern Africa	South Africa
EU Delegation to Botswana	Botswana
EU Delegation to Eswatini	Eswatini
EU Delegation to Mozambique	Mozambique
EU Delegation to Namibia	Namibia
EU Delegation to South Africa	South Africa
Eurocam	Mozambique
FNB South Africa	South Africa
Freight Forwarders Association	Botswana
French South African Chamber of Commerce and Industry (FSACCI)	South Africa
General Directorate of Customs	Mozambique
Giant Clothing	Eswatini
Hanns Seidel Foundation Namibia	Namibia
Hyphen Africa	Namibia
Independent Retail Europe	EU
Institute for the Promotion of Small and Medium Enterprises (IPEME)	Mozambique
International Trade Administration Commission (ITAC)	South Africa
International Trade Centre (ITC)	Eswatini
International Union for Conservation of Nature (IUCN)	EU
Italian-South African Chamber of Trade & Industry	South Africa
Lesotho Chamber of Commerce and Industry (LCCI)	Lesotho
Lesotho National Development Corporation (LNDC)	Lesotho
Letšeng Diamonds	Lesotho
Matebeleng Milling	Botswana

Organisation	Location
Meat Board of Namibia	Namibia
Media Institute of Southern Africa (MISA)	Lesotho
MG Health	Lesotho
Mining Chamber	Lesotho
Ministry of Agriculture	Eswatini
Ministry of Agriculture (MoA)	Botswana
Ministry of Agriculture and Rural Development -National Directorate of Plant Health and Biosafety	Mozambique
Ministry of Commerce, Industry & Trade - International Trade Division	Eswatini
Ministry of Economic Planning and Development	Eswatini
Ministry of Foreign Affairs, Belgium	Belgium
Ministry of Health	Botswana
Ministry of Industrialisation and Trade (MIT) - Department of International Trade	Namibia
Ministry of Industry and Trade	Mozambique
Ministry of Land and Environment	Mozambique
Ministry of Trade - Department of Industry	Lesotho
Ministry of Trade - Department of Trade	Lesotho
Ministry of Trade - One Stop Business Facilitation Centre	Lesotho
Ministry of Trade - Planning Unit	Lesotho
Ministry of Trade and Industry	Botswana
Mozambican Association of Sugar Producers (APAMO)	Mozambique
Mozambique Workers' Organization (OTM-CS)	Mozambique
Namib Mills	Namibia
Namibia Investment Promotion and Development Board (NIPDB)	Namibia
Namibia Network of the Cosmetics Industry (NANCI)	Namibia
Namibia Standards Institution	Namibia
Namibia Statistics Agency	Namibia
Namibia Trade Forum (NTF)	Namibia
National Association of Automobile Manufacturers of South Africa (NAAMSA)	South Africa
National Institute of Standards and Quality (INNOQ)	Mozambique
National University of Lesotho (NUL)	Lesotho
Offshore Development Company	Namibia
Ohlthaver & List Group	Namibia
Private Sector Foundation of Lesotho	Lesotho
Promove Comércio	Mozambique
Rhodes Food Group	Eswatini
RWE	Germany
SADC - Directorate of Industrial Development and Trade	Botswana
Selebi Phikwe Economic Development Unit (SPEDU)	Botswana
Seylan Freight	Eswatini
South African Liquor Brand Owners Association (SALBA)	South Africa
South African National Apex of Cooperatives (SANACO)	South Africa
South African Poultry Association (SAPA)	South Africa
South African Revenue Service (SARS)	South Africa
Southern African German Chamber of Commerce and Industry	South Africa
spiritsEUROPE	EU
Statistics Botswana	Botswana
Syndicat du Sucre de la Réunion	OR
The Rosehip Company	Lesotho
Trade Consultant	Mozambique
UNCTAD	Mozambique
UNIDO	Mozambique
Vinpro	South Africa
Wesgro	South Africa
Women and Law Southern Africa	Lesotho
XA Global Trade Advisors	South Africa
Zebra Shipping (Pty) Ltd	Botswana

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