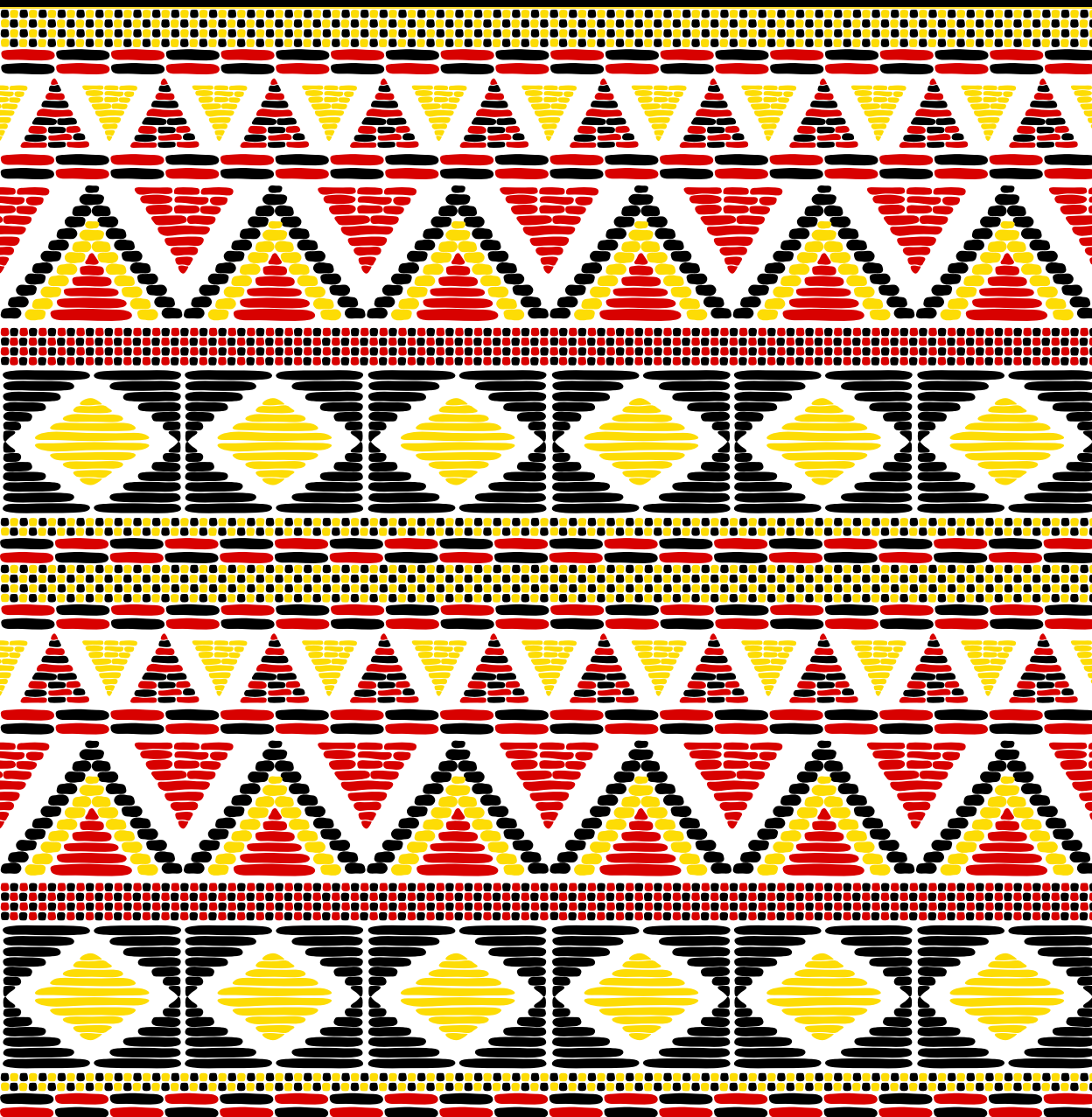




# National Green Export Review of Angola Wood, Fish, and Coffee: Baseline Report

ANGOLA



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## Contents

Note .....	ii
List of tables .....	iv
List of figures .....	iv
Acknowledgements .....	iv
Acronyms .....	v
<b>EXECUTIVE SUMMARY AND INTRODUCTION.....</b>	<b>vi</b>
<b>1. GREEN EXPORTS: OPPORTUNITIES AND BENEFITS IN THE REPUBLIC OF ANGOLA .....</b>	<b>1</b>
1.1. Transition to a more sustainable and resilient economy through trade.....	1
1.2. Green sectors and their products and services in a national economy .....	2
1.3. Overview of UNCTAD's National Green Export Review process .....	3
1.4. National Green Export Review process in the Republic of Angola .....	4
<b>2. POLICY FRAMEWORK IN ANGOLA.....</b>	<b>7</b>
2.1. Environmental framework .....	7
2.2. Development framework.....	8
2.3. Trade framework .....	9
2.4. Certification and standardization framework .....	10
<i>Certified Organic Production in Angola</i> .....	11
<i>Sanitary and phytosanitary measures</i> .....	11
<i>ISO Certification in Angola</i> .....	11
2.5. Investment framework .....	12
<i>Business Facilitation</i> .....	13
<b>3. TRADE AND ECONOMIC GROWTH IN ANGOLA .....</b>	<b>14</b>
3.1. Sustained long-term economic growth .....	14
3.2. Overview of Angolan trade.....	15
3.3. Identifying Competitive Green Products.....	17
<b>4. GREEN PRODUCTS UNDER PRELIMINARY ANALYSIS .....</b>	<b>20</b>
4.1. Wood exports.....	21
4.2. Fish exports.....	22
4.3. Coffee exports.....	23
4.4. Value chain of Angolan green products.....	24
<b>5. CONCLUDING REMARKS.....</b>	<b>26</b>
References .....	27
Notes.....	28
<b>ANNEX: Sectoral legislations complementing the Environmental Framework Law .....</b>	<b>30</b>

## List of figures

Figure 1:	Overview of the NGER process .....	3
Figure 2:	Activity flow during STEP 1 of the Angola NGER .....	5
Figure 3:	Number of ISO certified companies and organization in Angola .....	12
Figure 4:	FDI inward flows and stock between 2000 and 2015 in Angola .....	13
Figure 5:	Angolan GDP between 2000 and 2016 per main productive sector.....	14
Figure 6:	Comparison of the GDP ratio per sector between 2008 and 2015 values.....	15
Figure 7:	Overview of Angolan trade between 2009 and 2015 .....	16
Figure 8:	Angolan goods export in 2015 .....	16
Figure 9:	Export destination per geographical region in 2015 .....	17
Figure 10:	Angolan product space network.....	18
Figure 11:	Dynamic RCA of Angola's exports in 2015.....	18
Figure 12:	Selected green product exports between 2009 and 2015 .....	20
Figure 13:	YoY change in Angolan green product exports between 2009 and 2015.....	20
Figure 14:	Hierarchy chart of Angolan wood exports per trade partner in 2015 .....	21
Figure 15:	Preliminary SWOT analysis for the Angolan wood sector .....	22
Figure 16:	Hierarchy chart of Angolan fish exports per trade partner in 2015.....	22
Figure 17:	Preliminary SWOT analysis for the Angolan fishery sector .....	23
Figure 18:	Hierarchy chart of Angolan coffee exports per trade partner in 2015 .....	24
Figure 19:	Preliminary SWOT analysis for the Angolan coffee sector .....	24

## List of tables

Table 1:	Development dimensions and their fragility drivers.....	8
Table 2:	Angola's top three trade partners and their figures in 2015 .....	17
Table 3:	Angolan RCA index per type of product in 2015.....	19
Table 4:	Key export figures of Angolan selected green products in 2015.....	19

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## Acronyms

ACP	African, Caribbean and Pacific States
AGOA	United States African Growth and Opportunity Act
ANIP	National Private Investments Agency
APIEX	Angolan Investment and Export Promotion Agency
AU	African Union
DFQF	Chinese and Indian duty-free and quota-free
EBA	Everything But Arms
ECCAS	Economic Community of Central African States
EGS	Environmental Goods and Services
ENA	National Environmental Strategy
EPP	Environmentally Preferable Products
EQSGS	Environmental Quality Support Goods and Services
EU	European Union
FDI	Foreign Direct Investment
GDP	Gross Domestic Product
GSP	Generalized System of Preferences
GRN	National Reconstruction Office
GVC	Global Value Chains
ha	Hectare
HS	Harmonized System
IANORQ	Angolan Institute for Standardization and Quality
IQM	Internal Quality Management Systems
ISO	International Standards Organization
Kg	Kilogram
km	Kilometers
LDC	Least Developing Countries
MINAMB	Angolan Ministry of Environment
MINCO	Angolan Ministry of Commerce
MIND	Angolan Ministry of Industry
MINPESCAS	Angolan Ministry of Fisheries
NGER	National Green Exports Review
NTMs	Non-tariff measures
OPEC	Organization of the Petroleum Exporting Countries
PAEA	National Environmental Plan
PNGA	National Environmental Management Programme
prsvd	Preserved
PSM	Product Space Methodology
RCA	Revealed Comparative Advantage
REC	Regional Economic Communities
SADC	Southern African Development Community
SADCAS	SADC's Accreditation System
SDG	Sustainable Development Goals
SME	Small and Medium Enterprises
SPS	Sanitary and Phytosanitary measures
SWOT	Strengths, Weaknesses, Opportunities, and Threats
TBT	Technical Barriers to Trade
ToP	Training of Practitioners
ToT	Training of Trainers
UNPAF	United Nation Partnership Framework
US	United States of America
USD	United States Dollars
WTO	World Trade Organization
YoY	Year-Over-Year

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## EXECUTIVE SUMMARY AND INTRODUCTION

The 2030 Agenda for Sustainable Development and the Sustainable Development Goals (SDGs) suggest that to achieve sustainable development, a country must cover all three dimensions of sustainability – economic, social and environmental – simultaneously. In this context, international trade is expected to play an important role as a means – especially in developing countries and countries with economies in transition – to achieve the SDGs because it can be used as an enabler for reducing the environmental footprints of economic activities, for ensuring the sustainable use of natural resources, and for improving economic welfare and poverty alleviation efforts. From this perspective, UNCTAD has launched its National Green Exports Review (NGER)<sup>1</sup> initiative, which is a tool to facilitate the transition of countries to a greener and cleaner development path.

Through NGERs, UNCTAD works in close partnership with countries seeking to strengthen their green economies. NGERs assist these countries to develop and implement green economy policies, to diversify the local economy and to establish regulatory and institutional frameworks and cooperative mechanisms to strengthen and increase local capacity, efficiency and competitiveness of green sectors. Hence, NGERs respond to a country's demand for assessments of local potential to develop collaboratively selected green sectors at national level that can generate new employment and export opportunities while promoting national sustainable development (UNCTAD, 2017a).

NGERs are demand-driven; therefore, any NGER project necessarily involves an official request from a government to start a project. UNCTAD will then, in consultation with the designated national entity nominated by the inviting government, conduct a baseline study – such as this one – containing trade statistics and relevant regulatory and institutional frameworks related to the green economy. The baseline report presents an overview to guide not only national stakeholder discussions but also to assist them in designing an action plan and trainings to promote economic diversification and a more sustainable economy. Therefore, the expected results of a NGER are (UNCTAD, 2017a):

- Enhanced collaboration among sectoral stakeholders through collaborative activities and partnerships formed by the project;
- Improved understanding of national strengths and weaknesses for the production and export of selected green products and related value chains;
- Appreciation by policymakers of ways to create an enabling environment for the development of green sectors and exports of green products and services;
- An action plan validated by stakeholders to advance the adoption of sustainable production techniques and the promotion of promising green products and their value chains; and
- Positive socioeconomic and environmental impacts at local and national levels.

In short, the NGER process can help local stakeholders – public and private – to reformulate policies and institutions in order to diversify the local economy and leverage regional and global trade opportunities.

In addition, the NGER conducted in Angola includes, as one of its core objectives, capacity building activities that aim to train staff at the Ministry of Commerce<sup>2</sup> (MINCO) and other relevant key stakeholders in the analysis of green export opportunities. The overall outcomes are: 15 trainers trained, a set of policy recommendations, a country report validated with national stakeholders, training material (e.g. Green Products and Services Factsheets) for at least 200 people, and a set of potential actions for fostering local green products and services.



## 1. GREEN EXPORTS: OPPORTUNITIES AND BENEFITS IN THE REPUBLIC OF ANGOLA

This baseline report evaluates green sectors already in place in the Republic of Angola and works as a background document and a step-by-step guideline to support discussions at national level with local stakeholders. Evaluation and identification of sectors will take place initially using a Revealed Comparative Advantage (RCA) analysis of green sectors with expansion potential in Angola. In short, the baseline report aims to present a panorama of key issues related to local green sectors, with attention given to enhancing their regulatory, institutional and trade-related performance. As such, the baseline report operates as a supporting document for discussion among local stakeholders on strategic approaches to further the development of Angola's green products and services and their related sectors based on a collaborative, inter-sectoral, and strategic approach.

It is important to mention that selected sectors covered in this baseline report include those sectors in which Angola has already achieved considerable experience, but further growth can be achieved. The intention is to use them as stepping-stones to prepare national consultant(s) and to promote local stakeholder workshops, which will serve as training activities and canvass a wide spectrum of viewpoints by collaboratively identifying and selecting new options of green products and services for Angola and develop sectoral action plans. In addition, they guarantee that this inter-sectoral forum will undertake follow-up measures for further implementation of the NGER process with UNCTAD's support.

### 1.1 Transition to a more sustainable and resilient economy through trade

Across countries, transitions to a greener economy are expected to make increasing contributions to economic diversification, employment creation, export earnings, poverty alleviation, and to environmental protection and social equity. A greener economy is driven by both domestic and foreign demand for green products and services. However, it includes the use of more efficient and low-carbon energy and

transportation as well as the incentive to undertake organic agricultural production, ecotourism activities, waste and water recycling, environmental practices, and other emerging categories such as green construction, sustainably harvested timber products and natural fibers (UNCTAD, 2017a).

Looking specifically at trade, green products represent just a small fraction of their "brown" counterparts indicating a vast potential for growth. Whether in high-tech goods, commodities, basic manufactures or services, the export opportunities offered in a greening global economy are significant and expanding faster than overall global trade; a trend that is expected to continue (UNCTAD, 2017b).

There is a large untapped potential for developing countries and countries with economies in transition to advance the development of their green sectors. In this context international trade, through exports and imports of green goods and services, can facilitate the expansion of green sectors already in place and the development of new sectors based on local potential. Despite formidable challenges, undertaking this transition successfully can help countries to improve their competitive advantage, diversify the local economy and engage in international trade more effectively.

Principal approaches towards this goal rely on the creation of an enabling environment through improved regulatory and institutional frameworks for a greener economy, which include productive capacity building, investment and related financial services. In addition, these improved regulatory and institutional frameworks involve more open trade, with greater attention to social equity, poverty alleviation and environmental protection. Hence, green products and services can be used to enhance market access and investment opportunities. For example, green products related to renewable energy technologies such as solar panels and wind turbines and energy efficient products (e.g. compact fluorescent lamps) are among the products seeing the sharpest rise in exports during the last years (ITA, 2016; UNCTAD, 2017b). Although relatively few developing countries are participating directly in this trend, green technologies are often produced in developed and/or more industrialized developing countries using intermediate inputs originating from a wide variety of developing countries and countries with economies in transition that are integrated in global supply chains. Trade in intermediate goods, which accounts for about 40 per cent of world merchandise trade, is thus an important entry point for

these countries to supply indirectly to green markets (UNCTAD, 2011). Participation in intermediate tiers of supply chains has the potential to generate economy-wide gains, such as employment, improvement in technology and skills, productive capacity upgrading, and diversification into value-added exports. In addition, other green products based on organic agriculture have experienced global growth and are within reach of least developing countries like Angola.

While businesses in more industrialized developing countries are seizing new export opportunities for green products and services, especially green technologies, businesses in less industrialized developing countries continue to build their export capacities in green products, such as organic produce and beverages, natural cosmetics and fibers, biofuels, and sustainably harvested timber and fisheries products, and in green services, such as ecotourism. In each of these sectors developing country exports are experiencing sharp growth, employment, advancement of rural development and protection of the environment (UNCTAD, 2017b).

Dynamic green sectors can make important contributions towards the achievement of national development objectives relating to economic diversification, investment, poverty reduction, rural development, employment generation and an overall improvement of social welfare. Consequently, they can also make significant contributions to the SDGs.

## 1.2 Green sectors and their products and services in a national economy

There is no internationally agreed definition of what green sector, product and service are. However, it is generally agreed that they can be often considered as part of the Environmental Goods and Services (EGS)

mentioned as Environmental Quality Support Goods and Services (EQSGS) according to their end-use or purpose.

- Second category addresses products and services, from which production, end-use and/or disposal have reduced negative environmental impacts or, potentially, increased positive impact to the environment. In short, it considers a substitute of a traditional product or service that provides similar function and utility with less impact on the environment. This category also includes products and services that are generally used for purposes other than environmental ones. For example, related products may include items such as chlorine-free paper, renewable energy technologies, energy-efficient office machines, natural fiber packaging or floor covering materials, and a wide range of services associated with sustainable forestry and fisheries, organic agriculture, renewable energy transport, and ecotourism. Such products and services are sometimes referred to as Environmentally Preferable Products (EPPs), which have inherent environmentally superior qualities when compared to substitute goods.

While the first category defines a green product or service as one that is used to benefit the environment without considering its life-cycle, the second category defines as it as virtually any product or service, whatever it may be, as long it is a “greener” variant of a traditional counterpart. In short, they are considered green simply by having less of a negative impact on the environment than its traditional equivalent. Therefore, a green product variant could, for example, be manufactured from recycled components, be manufactured using renewable energy, be supplied to the market with less wasteful packaging, etc., or cover all options. The same logic applies to a service, for example, traditional tourism *versus* ecotourism.

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