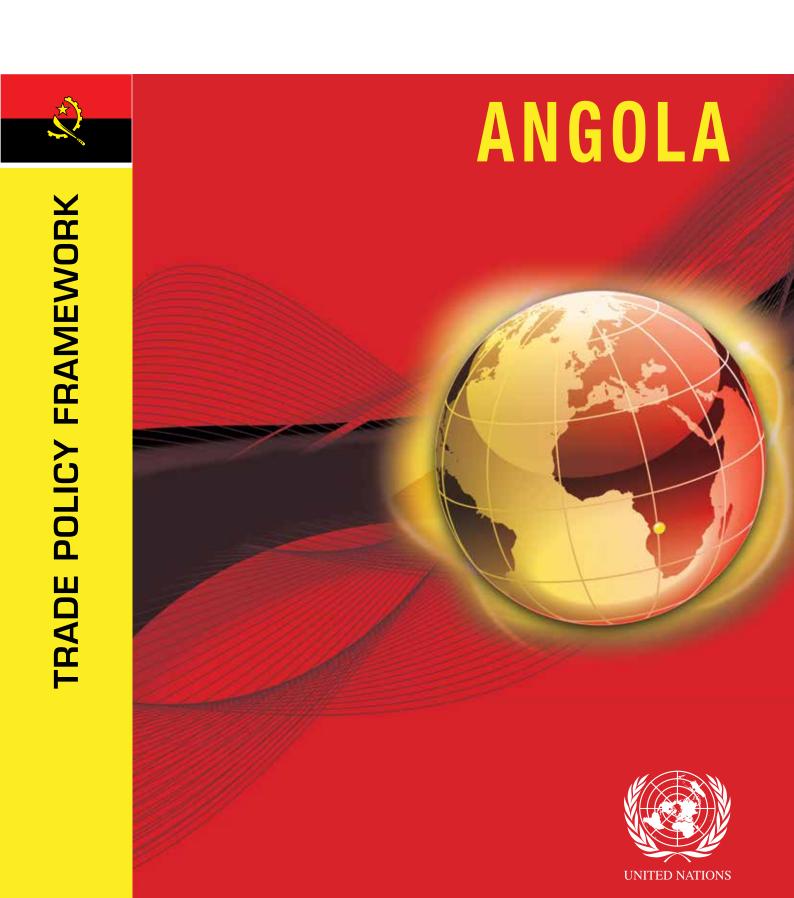
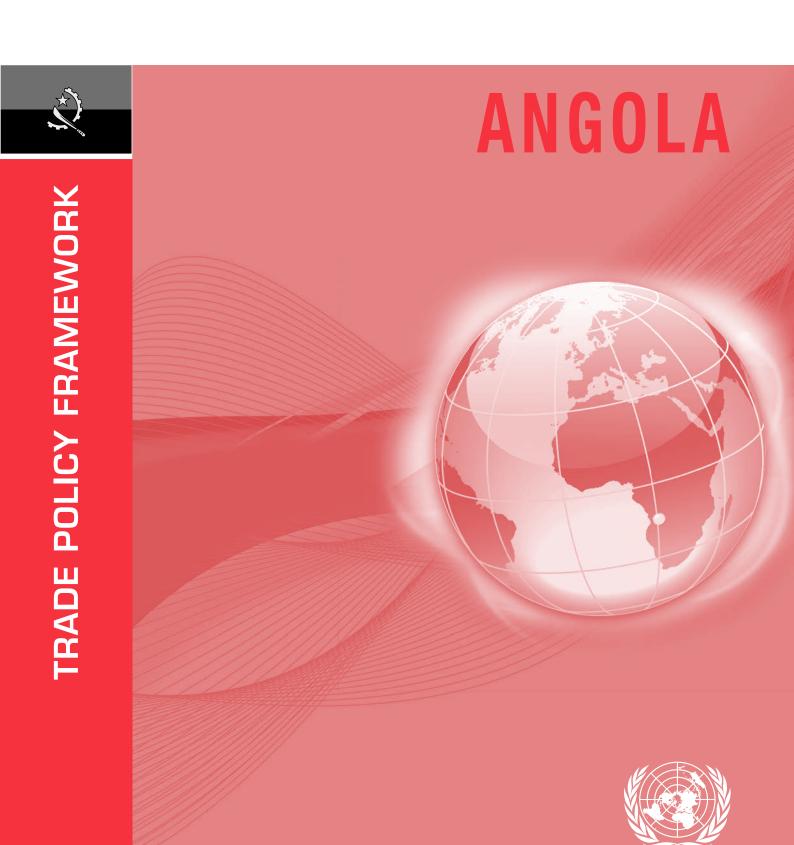
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In tables, figures enclosed in square brackets are negative.

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#### **ACRONYMS AND ABBREVIATIONS**

ACP African, Caribbean and Pacific States

ADB African Development Bank

AGOA African Growth and Opportunity Act
ANIP Agência Nacional de Investimento Privado

(National Private Investment Agency)

APS Angola Payment System
ATM automatic teller machine

COMESA Common Market of Eastern and Southern Africa

DFQF duty free and quota free
EAC East African Community
EBA Everything but Arms

ECCAS Economic Community of Central Africa States

EDEL Empresa de Distribuição de Energia Eléctrica

ENE Empresa Nacional de Energia Eléctrica

EMIS Inter-bank Services Company
FDI foreign direct investment

GATS General Agreement on Trade in Services

GDP gross domestic product GNP gross national product

GSP Generalized System of Preferences

ICT information and communications technology IEPA interim economic partnership agreement

IPRs intellectual property rights

ITES information technology enabled services ITU International Telecommunications Union

LDC least developed country
LNG liquefied natural gas
LPG liquefied petroleum gas
NBA National Bank of Angola
MDGs Millennium Development Goals

MFN most favoured nation
NTB non-tariff barriers
NTM non-tariff measures

OECD Organization for Economic Cooperation and Development

OPEC Organization of Petroleum Exporting Countries

R&D research and development S&D special and differential treatment

S&P's Standard and Poor's

SADC Southern African Development Community

SME small and medium-sized enterprise SPS sanitary and phytosanitary measures

SWOT strengths, weaknesses, opportunities and threats

TBT technical barriers to trade

TIFA Trade and Investment Framework Agreement
TRIP trade-related intellectual property right

UNCTAD United Nations Conference on Trade and Development

WTO World Trade Organization

EXECUTIVE SUMMARY

#### **EXECUTIVE SUMMARY**

This study was prepared at the request of the Government of Angola in order to assist the country in elaborating a trade policy framework. The main challenge facing Angola in participating in international trade is the continued over-reliance on exports of one commodity, petroleum, which accounted for 99 per cent of total merchandize exports of \$62.4 billion in 2014 and manufactured goods accounting for only 0.1 per cent. Rather than shrink, the proportion of exports of primary commodities has increased in the past 20 years. While it has diversified its export market from traditional developed countries, namely the European Union and the United States of America, to China, Angola has not correspondingly diversified its exported products. The central question remains how the country can improve its trade portfolio for economic diversification. Angola's economy has been growing progressively over the last 20 years. Between 2004 and 2009, growth was in the range of 15–20 per cent but there is no evidence that that growth supported export diversification to a large extent. Now growth has declined from about 18 per cent in 2008 to about 2 per cent in 2014, and this performance may adversely affect export diversification efforts.

The study examines Angola's participation in international trade and its existing trade policy, and seeks to recommend some areas of policy changes that may help the Government to improve its trade performance and bring about inclusive development. As regards merchandise trade, the study identifies several sectors that could be usefully explored for the country's export diversification efforts, particularly through accelerated agro-based industries development. These include coffee, tea, fruits, fruit juice, vegetables, maize, cassava, sugar cane, cotton, floriculture, sawdust briquettes, fisheries, palm oil and natural rubber. Some of these sectors have been important in improving export performance of some developing countries such as Malaysia in palm oil and Viet Nam in coffee. Other recommendations centre on improving capacities with supportive services infrastructures, and regulatory and institutional framework, improving and strengthening trade related fundamentals.

As regards trade services, the study identifies some key services sectors in which reforms and improvement in the supply side would be necessary to boost trade. These include the energy, financial, construction, tourism, telecommunications and transport services. For example, it calls for improved quality of transportation and increased supply of road cargo transportation. For telecommunications services, it calls for raising funds to create a broadband infrastructure in order to connect all urban and rural geographic regions of the country and establish connections with the regional infrastructures supporting the development of telecommunications. For tourism services, it calls for development of the Angolan tourism services through quality products, incorporating the regional, cultural and natural diversity and to stimulate and facilitate the consumption of Angolan tourism products in the national, intraregional and international market.

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