



ANGOLA

TRADE POLICY FRAMEWORK





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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

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 merchandise 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.

CONTENTS

| | |
|--|-----------|
| Notes | ii |
| Acknowledgements | iii |
| Acronyms and abbreviations | iv |
| Executive summary | v |
| I. PARTICIPATION IN TRADE | 1 |
| A. Overview | 2 |
| B. Trade performance and trends | 4 |
| 1. Trends in Angola's trade in goods | 4 |
| 2. Exports and imports | 4 |
| 3. Share of trade in GDP | 5 |
| 4. Exports of manufactured goods | 6 |
| 4.1. Composition of exports in goods by sector | 6 |
| 4.2. Exports in goods by destination | 7 |
| 5. Imports | 7 |
| 6. Regional trade | 7 |
| II. TRADE POLICY ENVIRONMENT AND INSTRUMENTS | 9 |
| A. Institutional framework | 10 |
| B. Existing trade policies and trade instruments | 11 |
| C. Trade policies by sector | 11 |
| 1. Agriculture | 11 |
| 2. Industry and manufacturing | 12 |
| 3. Trade policy tools | 13 |
| 3.1. Tariff regime | 13 |
| 3.2. Use of export tax | 13 |
| 3.3. Non-tariff barriers | 13 |
| 3.4. Market access conditions for top imports from Angola | 14 |
| 4. Services sector | 15 |
| 4.1. Comparing trade in goods and services | 16 |
| 4.2. Exports and imports of services | 16 |
| III. STRATEGIES FOR ADVANCING DEVELOPMENT OF THE SERVICES SECTORS | 17 |
| A. Overview | 18 |
| B. Angola and the United Nations Millennium Development Goals | 18 |
| C. Policy reform | 18 |

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