AFRICA TRADE DEVELOPMENT FORUM 2026

AFRICA TRADE DEVELOPMENT REPORT 2026

UNLOCKING AFRICA'S TRADE THROUGH QUALITY

BUILDING TRUST. EXPANDING EXPORTS. BOOSTING GROWTH

NOVEMBER 2026

Foreword from UNIDO

Africa stands at a defining moment in its economic development. The African Continental Free Trade Area (AfCFTA) offers unprecedented opportunities to strengthen regional value chains, expand trade, create decent jobs and accelerate sustainable industrial development. Turning market access into market success requires African enterprises to have the capabilities to transform local resources into value added products, recognised to meet standards and technical regulations, which translate the expectations of markets, buyers and consumers.

Trade is built on trust, and trust is built on quality — in all its dimensions. Quality means not only the characteristics of products and services, but also the capabilities of enterprises to deliver consistently, efficiently, sustainably and responsibly.



UNIDO is a key partner to deliver on this promise of trust through its support to countries and SMEs to strengthen competitive productive capacities, develop Quality Infrastructure, and to integrate in international value chains and supply chains.

Market requirements change over time. Today, sustainability related expectations include the management of natural environment like forests, the carbon impact of products, worker rights and overall due diligence within supply chains.

This joint TradeMark Africa- UNIDO flagship report reflects on this continuing journey, the arising challenges and the opportunities that we need to turn into a win for all. It gives a voice to key African and international stakeholders when identifying practical opportunities to reduce trade costs, strengthen SME competitiveness and turn continental ambitions into measurable results.

This report is a strategic milestone taking forward the cooperation between UNIDO and TradeMark Africa, combining our strengths to support Africa's regional integration, competitive enterprises and growing trade.

By investing in quality, strengthening trust and enabling African businesses to compete sustainably, we will contribute our part to turn Africa's trade ambitions into lasting prosperity.

Gerd Müller
Director General
United Nations Industrial Development Organization (UNIDO)

Foreword from TradeMark Africa

Africa's trade ambitions will be realised when more businesses can fulfil orders, retain customers and turn commercial opportunities into jobs. For TradeMark Africa, this means judging progress through the experience of the producer, processor or manufacturer trying to reach a customer. Can they obtain the services they need, complete the required procedures and deliver at a price that makes the transaction worthwhile?

Our work across the continent demonstrates the importance of connecting trade facilitation with enterprise competitiveness. Faster borders and better transport links have greater value when businesses can also meet product requirements and demonstrate that they have done so. Practical cooperation between authorities, technical institutions and the private sector is essential to making these improvements work together.

Over the past fifteen years, TradeMark Africa has worked with regional institutions, national standards and sanitary and phytosanitary (SPS) bodies, and businesses to make quality and trusted systems practical enablers of trade. We have supported the harmonisation of standards for widely traded goods, strengthened testing and certification services, and helped enterprises demonstrate compliance to access markets. These experiences demonstrate how TradeMark Africa helps businesses access and retain markets by reducing compliance costs and addressing risks that could disrupt exports while also reducing the time and cost for goods to cross borders.

This joint report with UNIDO brings a business perspective to the discussion on quality and trade. It examines where reforms and investment can help firms compete, and where fragmented procedures or gaps in services continue to hold them back. Smaller enterprises deserve particular attention because the cost of overcoming these obstacles can determine whether they enter an export market at all.

For TMA, the report's value lies in its application. Working around selected products and trade



routes offers a practical way to bring the relevant institutions together, establish priorities with businesses and assign responsibility for delivery. This also allows partners to track whether changes are improving commercial outcomes and to direct resources towards approaches that demonstrate results.

The Africa Trade Development Forum (ATDF) provides an opportunity to build support for this approach. Governments, businesses and development partners can use the proposed compact to identify shared priorities and discuss how implementation could be supported within their respective mandates and resources.

Our ambition is for those benefits to be reflected in sustained orders, stronger businesses and wider economic opportunity for the people and communities they serve.

David Beer
Chief Executive Officer
TradeMark Africa

Acknowledgments

This report, *Unlocking Africa's Trade through Quality*, is a joint publication of TradeMark Africa and United Nations Industrial Development Organization (UNIDO). It was developed under the overall leadership and coordination of Andrew Edewa (TMA) and Steffen Kaeser (UNIDO). The core drafting and editorial team comprised Nigel Croft (UNIDO), Martin Chesire (UNIDO), Elijah Munyi (TMA), Hellen Lang'at (TMA) and Bashir Byansi (TMA) coordinated by Mark Priestley. Their research, technical analysis and editorial work shaped the findings and proposed pathways for action. Catherine Mwangi (UNIDO) brought the concept development, the complementarities of contributions and the drafting of the report to a timely conclusion.

We acknowledge the contributions to the report, including the frameworks, published evidence and insights shared during various consultations by the African Union (AU), the AfCFTA Secretariat, Regional Economic Communities and Pan-African Quality Infrastructure (PAQI). The work of the World Trade Organization (WTO), the Standards and Trade Development Facility (STDF), the International Organization for Standardization (ISO), the International Electrotechnical Commission (IEC), Codex Alimentarius Commission (CAC), the International Plant Protection Convention (IPPC) and the World Organisation for Animal Health (WOAH) provided essential references for the technical analysis.

We also thank the businesses, producers, exporters, regulators, technical service providers and development partners whose experiences, programme evidence and insights informed the report. We extend special thanks to the African Business Council (AfBC) for its contribution. Their perspectives helped connect the analysis with the practical challenges of producing, demonstrating compliance and serving customers in African and international markets.

TMA and UNIDO extend their appreciation to all colleagues and partners who contributed to the report's development and technical review.

The analysis, findings and recommendations form part of this joint publication. References to external institutions, programmes or case studies do not imply their endorsement of its conclusions.

Executive Summary

Why do we say, *"Trade is built on trust"?* Because goods and services move only when buyers, regulators and consumers have confidence in their quality.

H.E. Hailemariam Desalegn Boshe,
TradeMark Africa Board Chair and former Prime Minister of Ethiopia



Africa's trade ambitions depend on businesses that can win orders, meet market requirements and deliver reliably at competitive prices. The AfCFTA provides a framework for expanding regional commerce and value chains. Converting these opportunities into sustained sales requires stronger enterprise capabilities and services that help firms demonstrate compliance in forms that buyers and authorities accept.

For exporters, manufacturers, growers and their suppliers, the challenge extends beyond tariffs and transport. Unnecessary differences in requirements, repeated assessments, inaccessible technical services and unpredictable procedures raise costs, tie up working capital and put customer relationships at risk. Smaller firms have fewer resources to absorb these burdens. Reform must reduce avoidable costs while maintaining effective protection of health, safety and the environment.

Quality means meeting regulatory requirements and customer expectations consistently. Standards provide common reference points; quality infrastructure connects standardisation, measurement, accreditation and conformity assessment, including testing, inspection and certification. SPS systems address food safety and animal and plant health risks. Quality infrastructure supports these systems but does not replace the responsibilities of competent authorities. Their commercial value depends on accessible, reliable services and acceptance of the resulting evidence in the intended market.

African countries already have institutions, expertise and regional arrangements on which to build. The WTO agreements on Technical Barriers to Trade and SPS measures, together with the AfCFTA Protocol on Trade in Goods and its annexes on trade facilitation, Technical Barriers to Trade (TBT) and SPS, provide foundations for cooperation. Implementation requires clear procedures and agreed conditions for accepting results. Accreditation supports confidence in technical competence; it does not automatically secure regulatory acceptance. Where appropriate, SPS cooperation can include recognising measures that achieve the importing country's required level of protection.

Drawing on business surveys, research, economic modelling and programme experience, the report connects commercial needs with the rules, capabilities and services that shape competitiveness. It distinguishes projections, reported results and evaluated impacts, recognising that trade outcomes reflect several influences.

What the Chapters Cover

Trade at Risk: The Cost of Fragmented Requirements. Chapter 1 examines compliance costs, delays and rejected consignments, distinguishing necessary investment from avoidable burdens

Unlocking trade: Simplifying the Rules. Chapter 2 explains standards, regulations and buyer requirements, and how alignment and practical application can help firms serve more markets.

Achieving Quality: How African Businesses Can Compete and Win. Chapter 3 focuses on enterprise capabilities, linking customer needs with production, skills, technology, finance and supplier development.

Demonstrating Quality: How the System Serves Business. Chapter 4 examines how accessible and credible technical services help businesses demonstrate conformity and secure acceptance of results.

Seven Pathways to Competitive African Trade. Chapter 5 brings these findings together in seven pathways and a proposed delivery compact.

Seven Priorities for Action

The report proposes seven interconnected transformation pathways towards 2030 and beyond. These address the institutional, regulatory and enterprise capabilities needed to make Africa's markets more integrated, its quality infrastructure and SPS systems more effective, and its businesses more competitive. The proposed 2027–2030 delivery actions offer practical starting points for implementation, not substitutes for longer-term reform. Together, the strategic pathways and early delivery priorities provide a framework for sustained, measurable progress

1. **Make existing trade commitments work for business.** Identify priority constraints within six product–trade route delivery packages, assign responsibility for the necessary decisions and verify with businesses that improvements are being applied.
2. **Align standards for priority traded goods.** Identify standards requiring alignment, support national adoption and help firms apply them. Resolve conflicting mandatory requirements through the appropriate regulatory processes.
3. **Make mutual recognition work across borders.** Specify which test reports and certificates will be accepted, by whom and under what conditions. Develop complementary SPS cooperation for safe, predictable food trade.
4. **Help firms win and retain customers.** Connect buyer requirements with production improvements, supplier development, packaging, finance and reliable delivery. Track completed orders and repeat sales.

5. **Make testing and SPS services accessible and reliable.** Prioritise capabilities needed by selected products and routes, supported by sustainable operating finance, transparent fees and clear service standards.
6. **Finance business upgrading and essential services.** Match enterprise investment and working-capital needs with suitable finance, while securing dependable funding for essential public SPS and regulatory functions.
7. **Exchange and accept trade documents electronically.** Connect issuing and receiving authorities so that documents can be authenticated and used without unnecessary paper copies or repeated data entry.



From the Forum to Delivery

The proposed Africa Trusted Trade Compact would organise delivery around six product–trade route packages across three regions, combining the relevant reforms, enterprise support, technical services, finance and digital interventions. An initial phase to 2030 would be followed by sustained operation and evidence-led expansion beyond 2030.

The ATDF can initiate this process by identifying products and routes and bringing together responsible authorities and businesses. Participants would agree scope, baselines, responsibilities, financing and a timetable for delivery and public reporting. Targets and dates are illustrative: endorsing the direction would not constitute agreement to individual targets or funding commitments. TMA and UNIDO can support coordination, technical assistance and learning within agreed mandates and resources.

Progress should be judged through lower avoidable costs and delays, reliable services, accepted results and sustained sales, alongside effective protection. These outcomes would provide a basis for deciding what to improve, finance and expand.

Table of Contents

Foreword from UNIDO	2
Foreword from TradeMark Africa	3
Acknowledgements	4
Executive Summary	5
What the chapters cover	6
Seven priorities for action	6
From the Forum to delivery	7
CHAPTER 1 - Trade at Risk: Fragmented Requirements	10
The Challenge – the Cost of Compliance and Non-Compliance	12
Global Coverage of Technical NTMs	14
Not all NTMs are Barriers	15
Major African Export Sectors and Typical Compliance Requirements	18
CHAPTER 2 - Unlocking Trade: Simplifying the Rules	20
Why Standards Matter	21
How Standards Should be Applied	21
The African Context	24
From Fragmentation to Convergence	28
Digitisation Enhances Efficiency	31
Africa on the International Stage	32
CHAPTER 3 – Achieving Quality: How African Businesses Can Compete and Win	34
Knowing What the Market Needs	35
Building Enterprise Quality	38
Different Roads to Market Success	39
Building Capability Through the Value Chain	41
From Enterprise Capability to a Trusted Trade System	43

Table of Contents

CHAPTER 4 – Demonstrating Quality: How the System Serves Business	44
The Importance of Conformity Assessment	45
The African Context	48
Credibility Matters	53
Serving the Needs of Business	54
Building Quality Infrastructure around Value Chains	56
The Importance of Mutual Recognition	58
How Should Investment Happen	59
Chapter 5 - Seven Pathways to Competitive African Trade	62
From Institutional Reform to Business Results	62
Pathway 1 - Make Existing Trade Commitments Work for Business	64
Pathway 2 - Align Standards for Priority Traded Goods	65
Pathway 3 - Make Mutual Recognition Work Across Borders	66
Pathway 4 - Help Firms Win and Retain Customers	67
Pathway 5 - Make Testing and SPS Services Accessible and Reliable	69
Pathway 6 - Finance Business Upgrading and Essential Services	70
Pathway 7 - Exchange and Accept Trade Documents Electronically	71
From the Forum to Delivery	72
Proposed Compact Scorecard	73
Turning Ambition into Results	74
List of Acronyms	75
Glossary and Technical References	78
Principal Technical References	79

CHAPTER 1 Trade at Risk: Fragmented Requirements

CHAPTER 1 AT A GLANCE

- **The AfCFTA creates a major economic opportunity for Africa.** It can expand intra-African trade, strengthen regional value chains and increase value addition, but the scale of the economic gains depends on African exporters being able to trade effectively within the larger market.
- **Complementary reforms will realise the opportunities from tariff liberalisation.** Unnecessary differences, duplication, limited transparency and delays across regulatory, SPS and commercial requirements increase costs and uncertainty and reduce the usable market available to African enterprises, with particularly significant impacts on MSMEs.
- **The scale of the African market offers scope for further intra-African trade.** Cooperation around priority sectors and value chains can connect harmonisation with implementation and cross-border recognition. Business feedback and trade evidence can help identify where convergence would offer the greatest benefit.
- **Compliance affects the whole transaction.** Fees, product adaptation, repeated assessments and delays all affect prices, cash flow and customer relationships. Smaller consignments face a particularly heavy burden.



The AfCFTA opens a larger market, but exporters will benefit only when they can meet the requirements of that market at a commercially viable cost. The agreement provides an opportunity to expand intra-African trade, develop regional value chains and increase value addition. Yet a tariff preference does not by itself make a shipment market-ready: producers must meet technical and sanitary and SPS requirements, secure credible evidence of compliance and move goods through predictable regulatory and border procedures. For smaller firms, the cost, time and uncertainty of those steps can determine whether an order is profitable or fulfilled at all.

Market access increasingly depends on regulatory compliance as well as tariffs. Technical regulations, standards-related conformity assessment and SPS measures are essential to health, safety and quality, but can be difficult and costly to navigate when requirements differ, information is inaccessible or tests and approvals are repeated. UNCTAD's analysis of mandatory measures in 121 economies, including 32 African countries, documents the extent to which these requirements shape the products African firms can trade.[1] Their prevalence alone does not prove that a measure is an unnecessary barrier; the trade effect depends on its design, administration, transparency and compatibility with measures in partner markets.

Progress on AfCFTA tariff schedules and rules of origin is creating opportunities for preferential trade. The Agreement provides for the progressive elimination of tariffs on 97% of tariff lines: 90% under regular liberalisation and 7% for sensitive products with longer transition periods. The remaining 3% may be excluded. South Africa's March 2026 implementation update reported that 25 countries had gazetted tariff schedules. Preferential rates apply where relevant national procedures and product rules are in place. It also reported agreement on outstanding automotive, clothing and textile rules, bringing product-specific rules of origin to full agreement. Businesses now need consistent implementation, workable customs procedures and clear guidance to use those preferences.[2]

This creates an important distinction between the market available in law and the market businesses can actually serve. Lower tariffs and common rules open opportunities, but firms must still identify customers, understand their requirements, adapt products where necessary, demonstrate compliance and move goods through predictable regulatory and border procedures. Businesses must meet technical regulations and SPS measures, while buyer and sector requirements determine whether they secure contracts and remain in value chains. The benefits of integration therefore depend on firms' capabilities, and the services and institutions that build trust between trading partners.

[1] UNCTAD (2024), Non-Tariff Measures and Deep Regulatory Integration in the AfCFTA

[2] South African Department of Trade, Industry and Competition (March 2026), Update on the AfCFTA, pp. 1–4. *www.thedtic.gov.za/wp-content/uploads/Newsletter-on-the-AfCFTA-March-2026.pdf.*

The Challenge – the Cost of Compliance and Non-Compliance

Technical non-tariff measures affect a growing share of global trade. The share of imports covered by SPS measures, TBT measures and pre-shipment inspections rose from around 15% in the late 1990s to almost 90% in 2024. 94% of agricultural imports were covered in 2024. This matters particularly for African food and agricultural exporters, which must meet plant-health, food-safety, traceability, labelling and testing requirements in destination markets.[3] It is no surprise therefore that UNCTAD estimates that non-tariff measures (NTMs) impose higher export costs than tariffs in 88% of countries.[4]

The economic cost of non-tariff barriers and regulatory differences in Africa

$20 BILLION PER YEAR

Potential gains to African economies from tackling non-tariff barriers across the contiment

Source:
UNCTAD (2021). Tackling non-tariff barriers in Africa: A UNCTAD research paper. Geneva: UNCTAD.

14.3%

Estimated additional intra-African trade costs associated with non-tariff barriers, including regulatory differences, SPS and technical standards

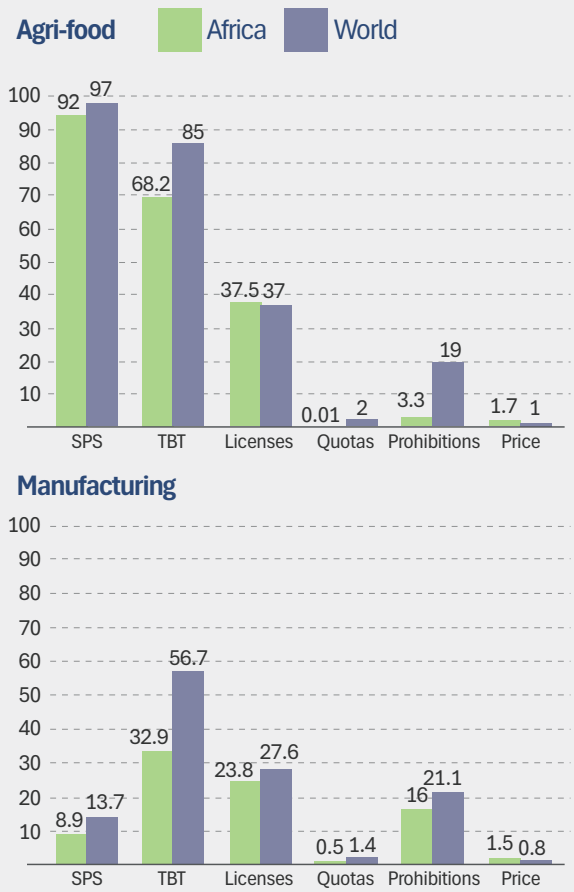
Source:
UNECA (2021). Economic Report on Africa 2021: Non-tariff barriers in Africa. Addis Ababa: UNECA

[3] World Bank (2025), World Development Report 2025: Standards for Development, Figure O.5/4.6. Technical measures cover SPS, TBT and pre-shipment inspections; the chart describes global imports, not Africa alone.

[4] UNCTAD (2026), Global Trade Update, May: Invisible Barriers—The Costs of Non-Tariff Measures, UNCTAD/DITC/INF/2026/5. *www.unctad.org/publication/global-trade-update-may-2026-invisible-barriers-costs-non-tariff-measures*

More directly relevant to African exporters, Figure 1.1 finds that 94% of agri-food products in African countries are subject to at least one SPS measure and 68% to a TBT measure; the corresponding worldwide figures are 97% and 85%. In manufacturing, African technical regulations have lower coverage: around one-third of products are subject to TBT measures.

Figure 1.1. Frequency of NTMs by type and sector: Africa and world (UNCTAD frequency index)



Source: UNCTAD (2024), Non-Tariff Measures and Deep Regulatory Integration in the AfCFTA, Figure 2, p. 10. The frequency index measures the proportion of products covered by a measure, not the incidence of non-tariff barriers.

Technical requirements can impose substantial costs. UNCTAD estimates average tariff-equivalent costs of technical measures at 12.8% for agri-food products and 1.8% across manufacturing, rising to 5.4% among manufactured products subject to these measures. These are modelled price effects, not costs that harmonisation could remove entirely. They nevertheless show why the design, administration and compatibility of requirements matter for competitiveness.[5]

Exporters' experiences help identify priorities for cooperation. The International Trade Centre's Made by Africa report draws on 9,700 interviews with exporters and importers across 22 countries. It reports NTM-related obstacles affecting 63% of African exporters surveyed. In its separate breakdown of obstacles to intra-African trade, 56% concern export-related measures imposed by the exporter's home country. This suggests scope to improve domestic procedures alongside cooperation on destination-market requirements.[6]

[5] UNCTAD (2024), Non-Tariff Measures and Deep Regulatory Integration in the African Continental Free Trade Area: Technical and Statistical Report, UNCTAD/DITC/TAB/2024/4, pp. 22–24. The estimates are modelled price effects, not savings wholly available through harmonisation.

[6] ITC (2022), Made by Africa: Creating Value through Integration, pp. 11–12 and 21, Figure 14. NTM surveys covered 9,691 exporter and importer interviews in 22 African countries during 2011–2020. www.intracen.org.

Global Coverage of Technical NTMs

The impact of non-tariff measures (NTMs) depends not simply on how widely they are applied, but on how difficult and costly they are for businesses to meet. High-income markets may apply more technical requirements, reflecting their regulatory systems and consumer protection objectives. However, exporters in lower-income countries can face greater difficulties complying with those requirements because of limited testing capacity, technical expertise, finance and access to recognised conformity-assessment services. The prevalence of NTMs therefore does not measure their burden on exporters. UNCTAD estimates that difficulties meeting market requirements are associated with forgone exports equivalent to around 10% of least developed countries' exports to G20 markets.[7]

Regulatory cooperation can reduce avoidable costs without weakening legitimate protection. Countries can align unnecessarily different technical requirements, agree on common testing methods and establish arrangements for accepting credible conformity-assessment results. This can allow businesses to produce to common specifications and avoid repeating tests or certification procedures solely because goods cross a border.

UNCTAD estimates potential reductions of 30–40% in the modelled costs associated with technical measures in selected sectors under deeper regulatory cooperation.[8] These are scenario-based estimates, not savings automatically achievable across all products or countries.

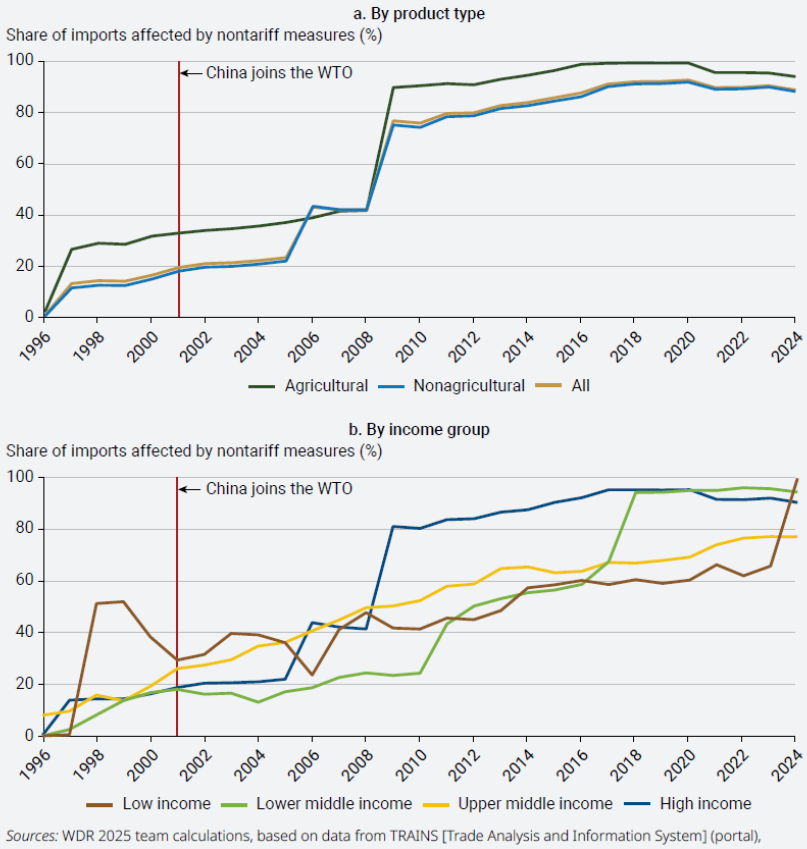
Harmonisation can reduce unnecessary differences in requirements, while accessible testing and appropriate acceptance arrangements can reduce the time and cost of demonstrating conformity. Through the EAC Standards Harmonisation and Conformity Testing Programme, TMA supported common product standards alongside improvements in testing and conformity-assessment arrangements. Programme reporting indicates that conformity-assessment clearance time for products without notified certification marks fell from 38 days in 2010 to ten days in 2014, while average testing fees declined from $500 to $205 per sample—a 59% reduction.[9] These historical results concern specified assessment procedures, not total border-clearance times, and should not be attributed to regulatory cooperation alone without further evaluation.

[7] UNCTAD (2026). Global Trade Update, May: Invisible Barriers—The Costs of Non-Tariff Measures. UNCTAD/DITC/INF/2026/5

[8] UNCTAD (2026). Global Trade Update, May: Invisible Barriers—The Costs of Non-Tariff Measures. UNCTAD/DITC/INF/2026/5.

[9] TMA (2019). Contribution of Standards Harmonisation and Certification towards Reduction in the Conformity Assessment Clearance Time and Testing Cost: The Case of the EAC. Programme-reported historical results for 2010–2014

Figure 1.2: Global coverage of technical non-tariff measures, 1996–2024



Sources: WDR 2025 team calculations, based on data from TRAINS [Trade Analysis and Information System] (portal),

Not all NTMs are Barriers

Some compliance costs are necessary and productive. Firms may need to adapt products, processes, testing or documentation to meet legitimate safety, health, environmental or performance requirements. These investments can also improve productivity and quality. Differences between markets may reflect different risks or conditions, so common requirements are not always appropriate.

Where Technical Trade Costs Arise

Search Costs	**Adaptation Costs**
Identifying and interpreting applicable requirements	Changing products, processes, labels or documentation between markets
Verification Costs	**Duplication Costs**
Testing, inspection, certification or other evidence needed to demonstrate conformity	Repeating technically credible assessment because earlier evidence is not accepted or cannot be reused
Delay Costs	**Uncertainty Costs**
Time lost while obtaining evidence, approvals or regulatory decisions	Commercial risk when firms cannot predicr which requirement, procedure or evidence will be applied

For a business, what matters is the total cost of completing a sale. Testing, inspection and certification fees are only part of the burden. Sampling, transport, product adaptation, storage, working capital, spoilage and delayed decisions can be equally significant. Fixed and upfront costs weigh particularly heavily on smaller consignments. Savings should therefore be assessed across the transaction while maintaining necessary protection.

BUSINESS EXAMPLE

ZAMBIA–TANZANIA MAIZE TRADE

When a Second Test Eats into an Exporter's Profit

A Tanzanian trader transports a 30-tonne maize consignment from Mbeya through the Nakonde border into Zambia. The trader has purchased the maize, arranged transport and obtained an aflatoxin test before dispatch. The buyer will pay only after delivery.

If another test is required at Nakonde, the truck waits while samples are analysed. Even if the maize passes, additional testing, vehicle waiting, storage and financing costs have reduced the trader's profit.

Illustrative cost of an additional 42-hour wait

Cost item	Assumed cost ($)
Additional aflatoxin test	120
Truck waiting (2 days × $100)	200
Storage and handling	60
Additional financing cost	20
Total additional cost	**400**

If the trader expected a **profit of $1,200**, the **additional $400** would consume one-third of that profit.

What changed at Nakonde? TradeMark Africa reports that improvements in local testing capability reduced maize-testing turnaround from approximately **72 to 30 hours—a reduction of 42 hours, or about 58%.**

LESSON FOR AFRICA: Accessible testing, clear procedures and appropriate acceptance of valid results can reduce unnecessary costs, protect traders' margins and improve delivery predictability without weakening essential food-safety controls.[10]

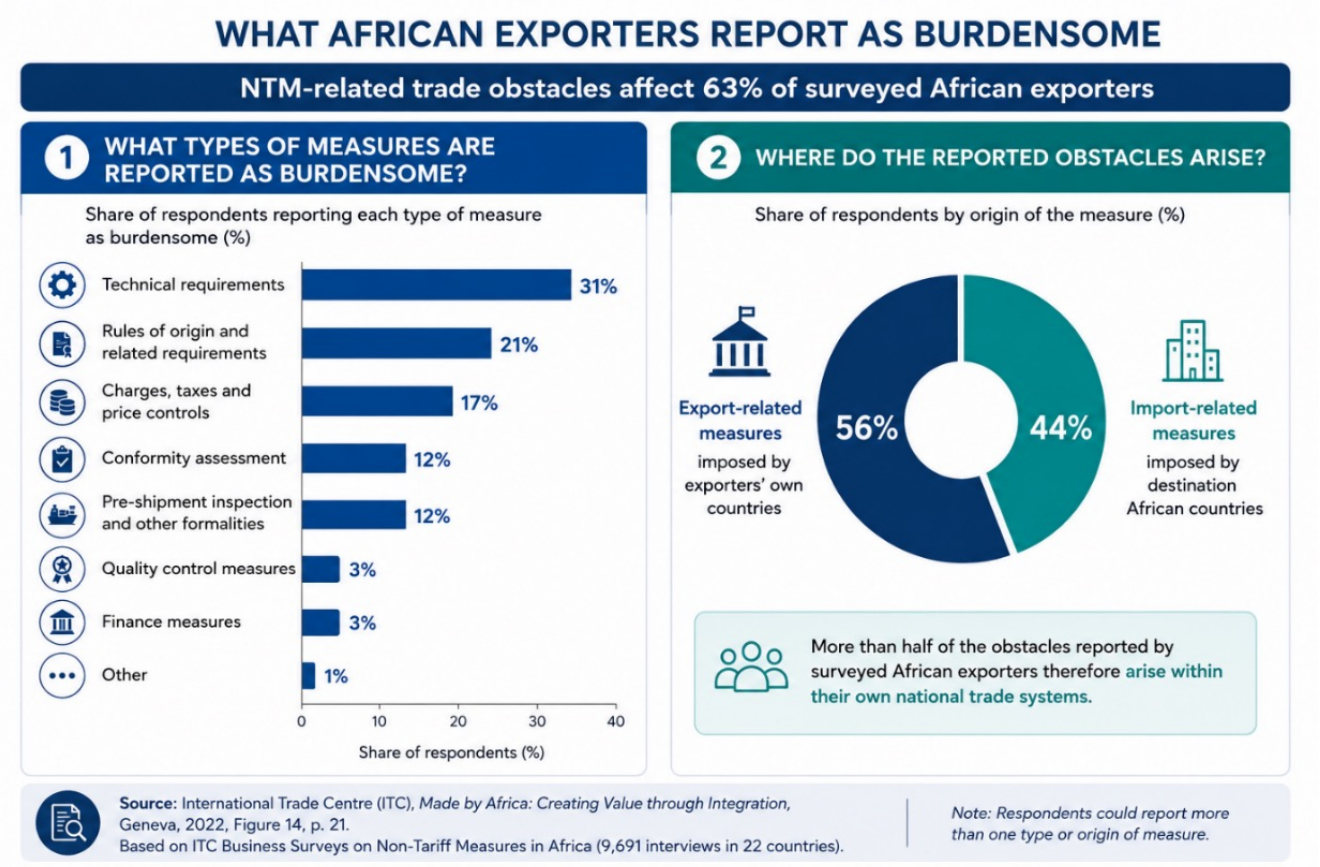
Source: and evidence qualification: The Nakonde testing improvement is programme-reported (TradeMark Africa, Annual Report 2024–2025, p. 31).



[10] The Nakonde testing improvement is programme-reported (TMA, Annual Report 2024–2025, p. 31).

The burden varies by product and trade route. Horticulture faces pest, pesticide-residue and delivery risks; cereals and oilseeds face contaminant, food safety and plant-health requirements; livestock and fisheries depend on reliable official controls; and manufactured goods may face different specifications and repeated assessments. Priorities should reflect trade potential, the severity of avoidable costs and the scope for practical improvement, alongside health and safety risks.

Business experience can help identify where clearer requirements, coordinated assessments or agreed acceptance procedures would reduce costs. Additional testing may be justified by risks or evidence needs; where equivalent assurance is already available and acceptable under the applicable rules, repetition may offer limited additional protection. Joint review can help distinguish these situations and identify practical improvements.



Major African Export Sectors and Typical Compliance Requirements

Sector	Main Requirement Type	Typical Compliance Requirement
Fresh produce	SPS	Phytosanitary certification, pesticide residue limits
Fisheries	SPS	HACCP, microbiological testing
Meat products	SPS	Veterinary certification, disease controls
Nuts and cereals	SPS	Aflatoxin testing
Processed foods	SPS/TBT	Food safety management systems
Chemicals	TBT	Hazard classification and labelling
Textiles	TBT	Fibre content and product labelling
Electrical products	TBT	Safety testing and certification
Construction materials	TBT	Product performance testing

Source: WTO SPS Agreement; WTO TBT Agreement; Codex Alimentarius (https://www.fao.org/fao-who-codexalimentarius); International Plant Protection Convention (https://www.ippc.int); UNIDO Standards Compliance Analytics (https://hub.unido.org/sca)

For African producers and exporters, the commercial challenge is to meet requirements efficiently and demonstrate compliance in a form that buyers and authorities accept. Failure can lead to rejection at the border or by the importer, adding disposal, re-export or replacement costs and putting future orders at risk.

The table below sets common causes of the border rejections affecting agricultural exports. A key takeaway from this table is that export rejections arise from different failures—unsafe products, plant or animal health risks, and/or inadequate documentation. Effective responses must therefore be tailored to the product- and specific risk. Better production controls, surveillance, competent testing and reliable certification can reduce avoidable failures while maintaining legitimate protection.



TABLE 1:

Common causes of border rejections affecting agricultural exports

Principal cause	African export products exposed	Risk or non-conformity	Quantitative evidence or indicator	Potential commercial consequence
Pesticide residues	Fresh vegetables, fruits, herbs, tea	Residues exceeding applicable maximum residue limits (MRLs), or use of substances not permitted in the destination market	Measure the number and percentage of tested consignments exceeding applicable MRLs, by product and destination	Rejection, destruction, additional testing, increased inspection and lost orders
Aflatoxins and other mycotoxins	Groundnuts, maize, cereals, nuts and spices	Naturally occurring fungal toxins exceeding applicable food-safety limits	Measure the percentage of samples exceeding destination-market limits, expressed in µg/kg; testing turnaround is also relevant	Rejection, treatment or diversion where legally permitted, storage costs and reduced market access
Salmonella and other microbiological contamination	Sesame, spices, processed foods, fish and other food products	Pathogens or microbiological results failing applicable food-safety criteria	Measure positive samples and non-compliant consignments as a percentage of those tested, by product and hazard	Rejection, recall, destruction, additional controls and reputational damage
Quarantine pests	Cut flowers, fresh fruits and vegetables	Detection of regulated pests, including False Codling Moth and fruit flies	Ghana recorded 330 harmful-organism interceptions in 2014, compared with 11 in 2020	Consignment rejection, intensified inspection, restrictions and possible loss of market access
Documentation deficiencies	Fresh produce, meat, fish, plants and regulated food products	Missing, inaccurate, inconsistent or invalid official certificates and supporting documents	Measure document-related holds or refusals as a percentage of consignments requiring documentation	Clearance delays, storage, demurrage, missed delivery windows and possible refusal
Veterinary drug residues	Fish, meat, dairy and aquaculture products	Residues of prohibited substances or concentrations exceeding applicable limits	Measure non-compliant samples against product- and substance-specific limits, generally expressed in µg/kg	Rejection, increased surveillance, restrictions on establishments or suppliers
Heavy metals	Fish, cereals, vegetables, cocoa and other food products	Lead, cadmium, mercury or other contaminants exceeding applicable maximum levels	Measure non-compliant samples against product-specific limits, commonly expressed in mg/kg	Rejection, disposal or other legally required action, and increased monitoring

Source: UNIDO Standards Compliance Analytics; European Commission Rapid Alert System for Food and Feed (RASFF); EU plant-health interception records; US Food and Drug Administration import-refusal records; Japan's imported-food monitoring statistics; TMA–UNIDO Trade Development Report 2026.

The next chapter examines how standards create value before a product reaches the border, supporting productivity, innovation and industrial upgrading. It explains why their benefits depend on practical use rather than publication alone.

CHAPTER 2 Unlocking Trade: Simplifying the Rules

CHAPTER 2 AT A GLANCE

- **Standards provide a common language for trusted trade.** Shared standards reduce uncertainty and trade costs, support effective regulation and public procurement, and help companies improve productivity, compete and participate in regional and global value chains.
- **Quality turns requirements into consistent, trusted results.** Quality is achieved within businesses before it is demonstrated through testing, inspection or certification. Consistently meeting requirements can reduce waste and failures, improve productivity and build confidence among regulators, buyers and consumers.
- **The private and public domains are becoming harder to separate.** International, regional and national standards support regulation and other public policy objectives, but can also be referenced by buyers. Buyers also use privately developed standards and assurance. The two domains increasingly interact; greater use of recognised standards provides common reference points and reduces the proliferation of differing requirements.
- **Convergence must accommodate different national circumstances.** Depending on the source of fragmentation, solutions can include harmonisation, equivalence, regulatory cooperation, interoperability, benchmarking and recognition and acceptance of credible results. SPS challenges may also require collective national and regional capabilities that individual enterprises cannot provide.
- **Africa's existing frameworks provide a strong basis for further cooperation.** Implementation varies across countries and sectors. Joint work can connect continental and regional agreements with usable requirements, predictable procedures and greater acceptance of evidence across markets.



> **Standards are a critical element of the trade landscape.**
>
> John W. H. Denton AO, Secretary General, International Chamber of Commerce (ICC). [11]



Why Standards Matter

Standards provide a common language for markets. They reduce uncertainty by providing common technical reference points. Agreed specifications, terminology, measurement methods and performance criteria help suppliers, customers and regulators communicate their requirements. They codify methods and practices that can improve safety, compatibility, productivity and management. Their practical value depends on consistent application, supported by capable people and technology.

Shared standards can translate into increased trade, but adoption alone does not establish impact. Research cited by the WTO associated a 10% increase in standards shared between trading partners with approximately 3% higher bilateral trade. This illustrates the potential value of common reference points; it does not establish causation or predict equivalent gains for Africa. Benefits depend on relevance, effective application and the wider conditions supporting trade. [12]

The greatest economic value of standards is often inside enterprises, before any certificate is issued. Common specifications, measurement methods and performance criteria reduce production variability, facilitate component sourcing, improve compatibility and support longer production runs. For manufacturers, these capabilities enable economies of scale and participation in regional supply chains. For food processors, they support consistent inputs, quality control and reduced waste. The economic benefit depends on relevant standards being understood and applied alongside appropriate technology, management and investment.

How Standards Should be Applied

Applying standards requires capability within the enterprise. Firms need to interpret requirements, integrate them into production and management, measure performance and correct weaknesses. Technical support should address these practical needs alongside access to the standards themselves.

Accessible information and practical support help businesses apply standards. Engagement with firms helps guide standardisation priorities, while participation in international technical work helps African institutions and industries anticipate relevant requirements.

[11] ISO, "New partnership for ISO and ICC," ISO News, quoting John W. H. Denton AO, Secretary General of the ICC

[12] WTO, World Trade Report 2005: Exploring the Links between Trade, Standards and the WTO, Geneva, 2005, p. 65, reporting Moenius (1999). The analysis found that a 10% increase in the number of standards shared between trading partners was associated with an approximately 3% increase in bilateral trade.

Regulators and buyers can draw on overlapping sources of standards. International, regional and national standards inform both legislation and purchasing specifications, while buyers may also require privately developed standards or assurance programmes. The distinction between mandatory regulatory requirements, and contractual buyer requirements, is therefore more useful to exporters than a simple division between "public" and "private" standards. Enterprises need to identify the complete combination applicable to their product and intended market. [13]

Exporters need a complete map of applicable market requirements, not simply a collection of certificates. Voluntary standards generally establish technical specifications or good practices; technical regulations impose mandatory requirements; SPS measures address specified health risks; and buyers may impose additional contractual conditions. Meeting a private assurance scheme does not automatically satisfy official import requirements, while legal market entry does not guarantee acceptance by a commercial buyer. This distinction is central to effective export planning and efficient compliance investment.



SPOTLIGHT ON
SOUTH AFRICA

South Africa Shows How Public and Private Standards Can Work Together

The Perishable Products Export Control Board (PPECB) conducts statutory food-safety audits of agricultural products intended for export and issues South African Good Agricultural Practices (SA GAP) certification.

However, food business operators holding specified recognised commercial certifications — including ISO 22000, GLOBALG.A.P., Tesco, Nature's Choice, HACCP, BRCGS and IFS — are exempt from separate SA GAP certification. PPECB retains regulatory oversight through unannounced audits.

The approach illustrates how appropriate acceptance of credible assurance can reduce unnecessary duplication while maintaining public oversight. [14]

Source: ppecb.com/services/food-safety-services/

[13] The terms "public standards" and "private standards" are sometimes used to distinguish these two broad sources of standards. "Public" standards are typically developed through consensus-based international, regional or national processes involving relevant stakeholders, including governments and other interested parties; examples include standards developed by ISO, IEC and Codex. "Private" standards are typically developed by individual companies, retailers, industry associations, consortia, NGOs or private assurance programmes.

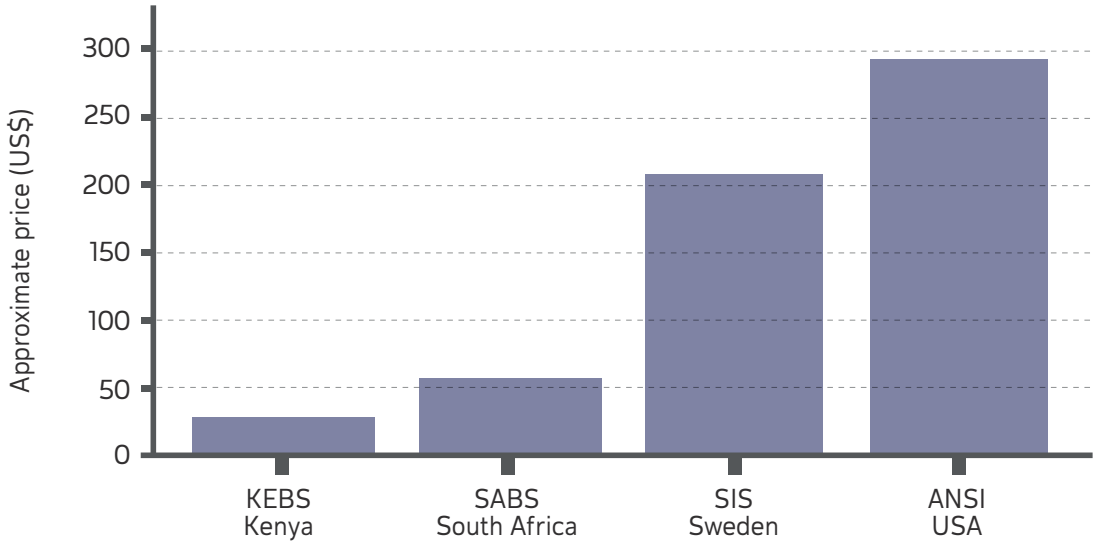
[14] Perishable Products Export Control Board (PPECB), "Food Safety Services," official website. https://ppecb.com/services/food-safety-services/

Consistent application helps businesses realise these benefits. Where products or processes do not meet requirements, firms can face direct trade costs. Rejected consignments can mean lost products, freight and insurance costs, reduced export earnings and reputational damage, while repeated failures can undermine longer-term competitiveness. Support for quality management can help businesses anticipate and address these risks.

Market requirements continue to evolve after a business begins exporting. Sustainability, responsible sourcing, traceability and environmental, social and governance requirements increasingly affect market eligibility and buyer selection. Measures such as the EU Carbon Border Adjustment Mechanism, EU Deforestation Regulation and Regulation (EU) 2025/40 on packaging and packaging waste introduce requirements for affected products and value chains. Businesses need timely guidance that distinguishes proposed rules from adopted obligations, identifies implementation dates and translates requirements into practical investment decisions. [15] [16]

National adoption and local pricing can make standards more affordable. The August 2026 catalogue comparison places national adoptions of ISO 9001:2015 at approximately $28 in Kenya and $57 in South Africa, compared with $208 in Sweden and $293 for the ISO publication sold through ANSI in the United States (Figure 2.3).[17] These examples illustrate price differences, not affordability relative to enterprise income. Access also depends on licensing terms, suitable formats and the support needed to apply the standard.

Figure 2.1– The same international standard, different prices



[15] EU (2023), Regulations (EU) 2023/956 and (EU) 2023/1115.

[16] EU (2025), Regulation (EU) 2025/40 on packaging and packaging waste. The Regulation entered into force on 11 February 2025 and became generally applicable from 12 August 2026.

[17] Prices for ISO 9001:2015 or its national adoption, verified from the respective standards catalogues on 13 August 2026: Kenya Bureau of Standards (KEBS), KES 3,600; South African Bureau of Standards (SABS), R915.40; Swedish Institute for Standards (SIS), SEK 1,988; ANSI Webstore, $293. USD equivalents are approximate, based on exchange rates applicable on 13 August 2026

The African Context

Africa has established much of the policy and institutional architecture needed to reduce unnecessary regulatory fragmentation. The AfCFTA provides frameworks for cooperation on TBT, SPS measures, customs and trade facilitation. These are complemented by the Africa Quality Policy (AQP), the SPS Policy Framework for Africa and the African Continental Technical Regulatory Framework (ACTReF).[18] Together, they provide a foundation for more coherent requirements, stronger regulatory cooperation and trusted cross-border trade.

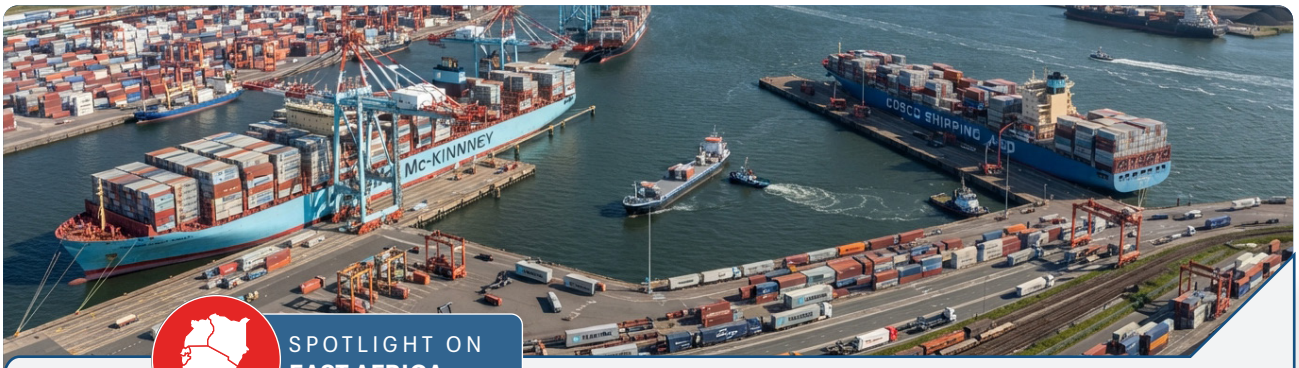
Differences in national requirements can impose additional costs on exporters. Exporters may face different technical specifications, testing procedures, documentation requirements and acceptance conditions when supplying neighbouring markets. These differences can require separate production runs, repeated assessments and additional expenditure, weakening the economies of scale that regional integration is intended to create. UNCTAD estimates average trade-cost equivalents associated with technical measures of 12.8% for agri-food products and 1.8% across manufacturing, rising to 5.4% among affected manufactured products. [19] These modelled estimates concern technical measures generally, not fragmentation alone, and should not be interpreted as costs that harmonisation could eliminate entirely.

The gap lies increasingly between continental commitments and practical implementation. UNCTAD's analysis of cereals, pulses and derived products identifies continuing differences between harmonised African standards and mandatory requirements applied nationally. [20] A common regional standard therefore does not automatically create common market conditions. National adoption, appropriate regulatory alignment, accessible conformity assessment and acceptance of relevant results are needed before businesses can realise the benefits. Continental and regional cooperation should focus on commercially important products and value chains, with national authorities addressing unnecessary differences and businesses gaining access to suitable technical services.

[18] AU (17 May 2024), The African Ministers Adopted Critical Policy Framework to Boost Africa's Economic Diversification.

[19] UNCTAD (2024), Non-Tariff Measures and Deep Regulatory Integration in the AfCFTA, pp. 22–24.

[20] UNCTAD (2024), Non-Tariff Measures and Deep Regulatory Integration in the AfCFTA, pp. 22–24.



SPOTLIGHT ON
EAST AFRICA

HARMONISATION PLUS: From Common Standards to Faster, more Trusted Trade

EAST AFRICA | HARMONISATION PLUS — From Common Standards to Faster, More Trusted Trade

The challenge

Common standards alone still left exporters facing:

- Distant and limited testing services
- Different sampling procedures
- Repeated testing
- Longer and costlier clearance

TMA's support

A practical package with EAC and national partners:

- ✓ Harmonised standards
- ✓ Stronger laboratory capacity
- ✓ Decentralised testing (e.g. Gulu, Mbale, Mbarara in Uganda)
- ✓ Aligned sampling and testing procedures
- ✓ Improved certification and metrology
- ✓ Greater regulatory cooperation

Reported results (2010–2014)[1]

Conformity-assessment clearance time	Average testing fee (per sample)
38 → 10 days	$500 → $205
↓ 74% reduction	↓ 59% reduction

Uganda example: TMA equipped and built skills in regional laboratories in Gulu, Mbale and Mbarara, bringing testing closer to enterprises. The Gulu laboratory, together with harmonised sampling and testing procedures, supported efforts to address an aflatoxin-related disruption to maize trade between Uganda and South Sudan.[2]

Outcome: A practical response that helped restore and normalise maize trade between the two countries.

Key lesson | **Harmonisation** delivers greater value when **businesses** can **demonstrate conformity** efficiently and authorities can rely on appropriate technical evidence.

Sources: [1] *TradeMark Africa (2019), Contribution of Standards Harmonisation and Certification towards Reduction in Conformity Assessment Clearance Time and Testing Cost: The Case of the EAC, 20 May.* [2] *TradeMark Africa, Uganda regional laboratory and Uganda–South Sudan maize trade programme reporting.*

Note: Programme-reported results for specified products and assessment procedures; not total border clearance or independently established causal effects.

Africa has an established institutional foundation for cooperation on quality infrastructure. The Pan-African Quality Infrastructure (PAQI) network brings together the African Organisation for Standardisation (ARSO), the African Electrotechnical Standardisation Commission (AFSEC), the Intra-Africa Metrology System (AFRIMETS) and African Accreditation Cooperation (AFRAC). These organisations support standards, reliable measurement and accreditation cooperation, strengthening confidence in conformity assessment across markets

Complementary institutions support cooperation on food safety, animal health and plant protection. The African Union Inter-African Bureau for Animal Resources (AU-IBAR) supports animal-health and livestock-sector cooperation, while the African Union Inter-African Phytosanitary Council (AU-IAPSC) promotes plant-health coordination. The African Union Commission coordinates wider SPS policy with the AfCFTA Secretariat, regional economic communities and national competent authorities. International reference frameworks include Codex Alimentarius, the International Plant Protection Convention (IPPC) and the World Organisation for Animal Health (WOAH).

The principal challenge is translating continental cooperation into accessible and effective national services. Capabilities remain uneven. UNIDO's 2024 Quality Infrastructure for Sustainable Development (QI4SD) Index illustrates this uneven capacity. Among the 41 African countries assessed, standardisation scores ranged from 6 to 47, with a median of 27, compared with 25 to 85 and a median of 49 across 40 European countries.[21] These differences reinforce the need to pair continental harmonisation with stronger national standardisation capabilities, practical implementation support and accessible information for businesses. These standardisation index scores indicate differences in assessed capacity; they do not measure exporters' access to services or the effectiveness of SPS controls.

Strengthening these complementary systems requires closer coordination between technical institutions and competent regulators, supported by sustainable investment, clear responsibilities and practical regional cooperation. The measure of progress is whether African enterprises can access credible technical services, regulators can protect human, animal and plant health, and appropriate evidence can support trusted cross-border trade.

Harmonisation of standards is already happening at continental and regional levels. In 2025, ARSO reported over 2,000 harmonised and published African Standards across 15 priority sectors.[22] Regional Economic Communities (RECs) also provide mechanisms for standards harmonisation and regulatory cooperation, while international standards developed by ISO, IEC, Codex, WOAH and IPPC provide reference points for further alignment.

Continental cooperation on standards is also strengthening. The five-year ISO–ARSO Kigali Agreement, signed in October 2025, aims to align standards work programmes, reduce duplication and technical barriers to trade, and support implementation of the AfCFTA.[23]

[21] UNIDO/INetQI (2025), Quality Infrastructure for Sustainable Development: QI4SD Index Results Report, based on 2024 data.

[22] African Organisation for Standardisation (ARSO), 53rd ARSO Central Secretariat Webinar Working Document, 26 March 2025. ARSO reported 2,171 harmonised and published African Standards across 15 priority sectors and 97 Technical Committees.

[23] International Organization for Standardization (ISO), "ISO and ARSO sign landmark Kigali Agreement to strengthen trade and standards cooperation in Africa", 9 October 2025. https://www.iso.org/news/2025/10/iso-arso-kigali-agreement-trade

The next phase of African harmonisation should prioritise product families with significant commercial potential. Construction materials, processed foods, textiles, packaging, electrical products and emerging industrial components may require coherent packages covering product specifications, sampling, test methods, safety, marking and labelling. Selection should reflect existing trade, credible future demand, value addition, technical divergence and implementation feasibility. Agricultural commodity standards should be considered alongside, but not conflated with, applicable SPS requirements.



SPOTLIGHT ON **AFRICA**

African Horticulture Exports to The UK - Market Access and Market Success

UK Government guidance developed for African fruit and vegetable exporters illustrates how regulatory and buyer requirements operate alongside one another.

Exporters must first meet applicable UK statutory requirements, which can include phytosanitary certification and product labelling standards. But gaining access to the market does not necessarily secure a buyer.

The guidance explains that buyers may require additional assurance, including GLOBAL G.A.P. certification, certification under an appropriate GFSI-recognised food-safety programme, and ethical-trade assessment such as a SMETA audit. The applicable combination depends on the product, production or processing activity and buyer.

This illustrates the distinction between market access and market success: regulatory requirements determine whether the product can enter the market, while additional buyer requirements can determine whether the enterprise wins and retains the customer. [24]

Source: www.gov.uk/government/publications/african-fruit-and-vegetable-exporters-seeking-uk-buyers-a-guide/a-guide-for-african-fruit-and-vegetable-exporters-seeking-uk-buyers

> **One standard, one test – accepted everywhere.**
>
> Joint statement from ISO, IEC and ITU, World Standards Day Message, 2002



From Fragmentation to Convergence

Convergence should be understood functionally rather than as a requirement for uniformity. Depending on the problem, greater integration may be achieved through harmonised requirements, use of common international or African standards, equivalence, regulatory cooperation, interoperable procedures or recognition and acceptance of credible results. The appropriate instrument depends on the source of fragmentation. Where legitimate differences in risk or policy objectives remain, interoperability may facilitate trade more effectively than attempting to make every national system identical.

For SPS measures, convergence does not necessarily mean uniformity. Food-safety risks and pest or disease conditions differ across countries and regions. Under the principle of equivalence, an importing country may accept a different SPS measure if it achieves the importing country's required level of protection. Regionalisation recognises that pest or disease conditions can differ within a country, allowing trade requirements to reflect the conditions of specific areas rather than an entire national territory. These[25] principles help facilitate safe trade while respecting legitimate differences in risk. They are distinct from accreditation and the recognition of conformity assessment results, which concern confidence in the organisations and procedures used to demonstrate compliance. [26]



[24] A Guide for African Fruit and Vegetable Exporters Seeking UK Buyers," GOV.UK, official government guidance. https://www.gov.uk/government/publications/african-fruit-and-vegetable-exporters-seeking-uk-buyers-a-guide/a-guide-for-african-fruit-and-vegetable-exporters-seeking-uk-buyers

[25] https://www.gov.uk/government/publications/african-fruit-and-vegetable-exporters-seeking-uk-buyers-a-guide/a-guide-for-african-fruit-and-vegetable-exporters-seeking-uk-buyers

[26] Agreement Establishing the African Continental Free Trade Area, Protocol on Trade in Goods, Annex 7: Sanitary and Phytosanitary Measures, particularly Articles 7–10.

STUDY BOX

Benefits of Regulatory Convergence on Trade Performance

Experience from other regions illustrates how common requirements, supported by competent institutions and accepted assessments, can help businesses serve neighbouring markets. ASEAN cosmetics provides one example. The trade figures below describe changes over the period; they do not establish the contribution of regulatory convergence alone.

ASEAN adopted its Harmonised Cosmetic Regulatory Scheme in 2003, including the ASEAN Cosmetic Directive. It established common requirements for ingredients, labelling, good manufacturing practice, product claims and safety assessments, while replacing prior product approval with notification and post-market surveillance. This reduced the need for manufacturers to navigate entirely different regulatory systems in each market, making regional expansion easier and supporting exports beyond ASEAN. ASEAN cosmetics trade subsequently expanded. Between 2004 and 2014, total ASEAN cosmetics exports increased from $2.6 billion to $9.9 billion, while intra-ASEAN exports rose from $892 million to $3.4 billion—growth of over 280%. [27]



The number of harmonised standards is an important measure of continental technical cooperation. Also useful are measures that show whether relevant standards are adopted or referenced where appropriate, accessible to enterprises, understood by users and reflected in production, procurement, regulation and conformity assessment.

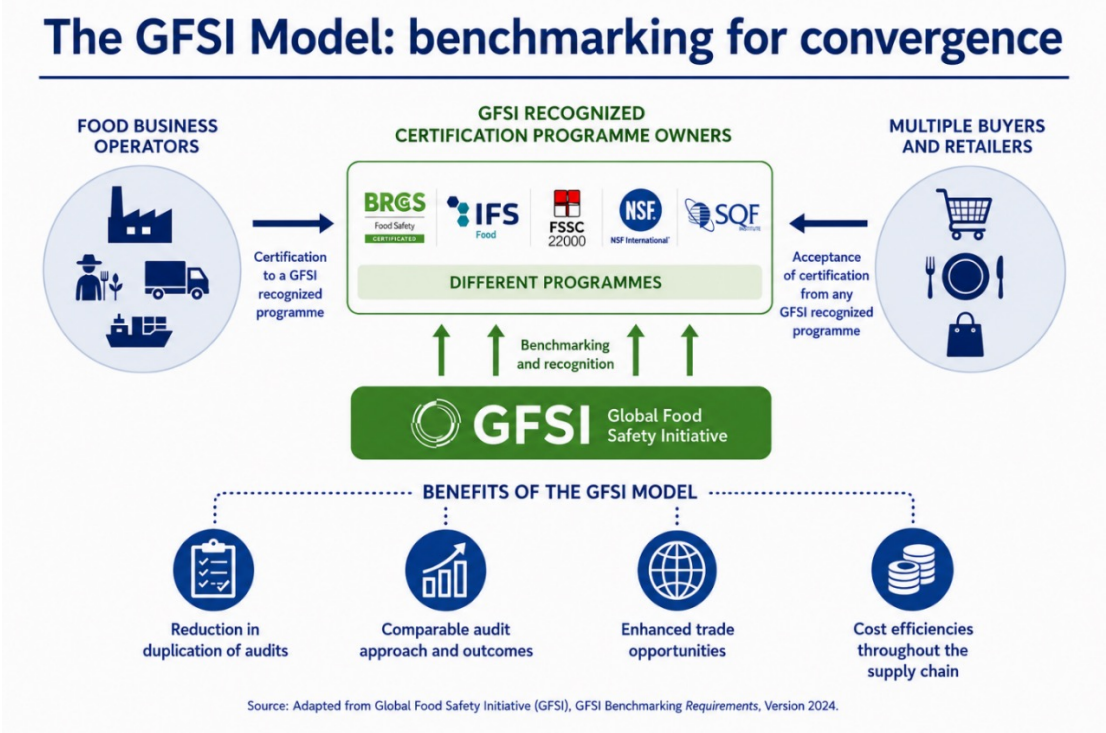
The number of harmonised standards is an important measure of continental technical cooperation. Also useful are measures that show whether relevant standards are adopted or referenced where appropriate, accessible to enterprises, understood by users and reflected in production, procurement, regulation and conformity assessment.

[27] ASEAN Secretariat (2015), ASEAN Integration Report 2015, discussion of the ASEAN Harmonised Cosmetic Regulatory Scheme and cosmetics trade. https://asean.org/wp-content/uploads/2021/09/2.-ASEAN-Integration-Report-2015.pdf

Common approaches to demonstrating conformity can reinforce harmonisation. Under the ARSO Conformity Assessment Programme (ACAP), the African Quality Mark (AQM) provides a certification mechanism for products meeting applicable harmonised African Standards and may be used alongside national marks. Its trade value depends on the competence and oversight of participating certification bodies and on acceptance by the relevant authorities and buyers. Use of the mark should therefore be distinguished from automatic regulatory approval or unrestricted access across African markets.[28]

Continental harmonisation must be complemented by domestication of continental standards. UNCTAD analysis of cereals, pulses and derived products found continuing regulatory differences between ARSO standards and mandatory measures applied by individual African countries. It concluded that greater dialogue between AfCFTA State Parties, ARSO and other PAQI institutions is needed to translate regional harmonisation into greater regulatory convergence.[29]

Benchmarking furthers convergence. Initiatives such as those operated by the Global Food Safety Initiative (GFSI) assess programmes against common requirements, instilling confidence in recognised certification. However, benchmarking does not oblige every buyer to accept every programme or eliminate product-specific and contractual requirements. Its practical value depends on whether buyers use the recognised assurance to reduce unnecessary repeated audits and assessments.



[28] www.arso-oran.org/acap-2/

[29] UNCTAD (2024), non-tariff measures and deep regulatory integration in the African Continental Free Trade Area, Technical and Statistical Report, UNCTAD/DITC/TAB/2024/4, November 2024, Section 3.3.

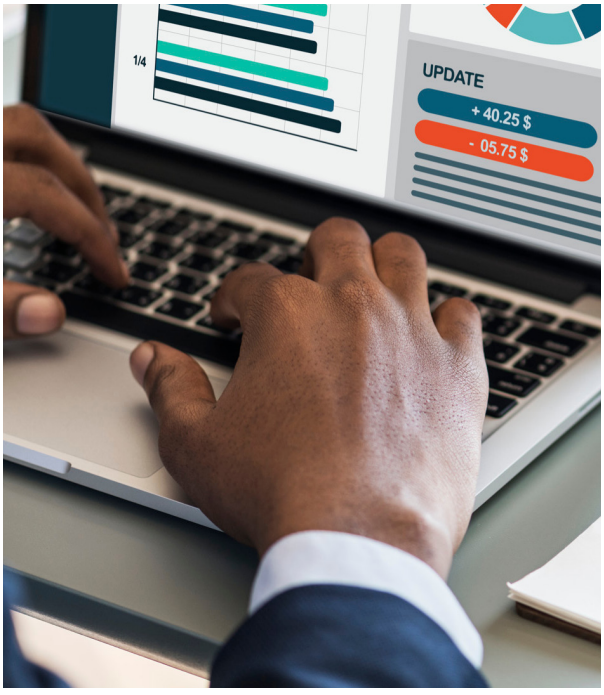
Good regulatory practice can help prevent new fragmentation. When introducing or revising technical requirements, authorities should define the risk and policy objective, consider relevant international standards and feasible alternatives, consult affected stakeholders and assess implementation capacity and trade effects. Clear institutional mandates, accessible procedures and periodic review of existing measures can improve protection while reducing unnecessary complexity for enterprises.

Digitisation Enhances Efficiency

Digital systems can reduce the time and cost of regulatory procedures when agencies exchange usable information. The IPPC ePhyto Solution provides a complementary mechanism for exchanging standardised electronic phytosanitary certificates. Sixteen African countries exchanged certificates through the system during the year to November 2025; Morocco projects an 82% reduction in certification-processing time.[30] [31] [32]

These benefits depend on transparent, usable information. Alongside access to a technical regulation or SPS measure, an enterprise needs to determine which requirement applies to its product, when it takes effect, which authority administers it and what evidence is required. Platforms work when they not only publish documents, but also progressively make requirements searchable, up-to-date, product-specific and linked to the relevant procedures and competent authorities. Rwanda's Converged Licensing Management System records a reduction in product-certification costs from $39 in 2019 to $6 in 2024. In Tanzania, reported permit-issuance time fell from 14 days in July 2022 to one hour in June 2024 following introduction of the Mifugo Integrated Management System, which enables livestock and fisheries traders to obtain regulatory documents online.

Electronic certification complements underlying SPS controls. Its credibility depends on inspection, diagnosis, surveillance and competent-authority oversight. Chapter 4 examines these services and the arrangements needed for authorities to use electronic evidence in practice.



[30] UNCTAD (2024), non-tariff measures and deep regulatory integration in the African Continental Free Trade Area, Technical and Statistical Report, UNCTAD/DITC/TAB/2024/4, November 2024, Section 6

[31] IPPC ePhyto Solution implementation update, CPM 2026/11, Rome, FAO, 2026.

[32] STDF, "How ePhyto is changing trade, one certificate at a time", WTO, 2026.

Africa on the International Stage

Africa's long-term competitiveness depends partly on its ability to shape the technical rules governing trade. International standards dictate regulatory requirements, procurement, technologies and buyer expectations worldwide. Participation in organisations such as ISO and IEC, as well as the international bodies recognised under the WTO SPS Agreement for food safety, animal health and plant health[33], helps shape standards to reflect African conditions and priorities, while providing early insight into emerging requirements and technical expertise that can be transferred to enterprises, sectors and national standards systems.

This is currently a missed opportunity. Effective participation requires sustained scientific expertise, coordinated national positions, industry evidence and meaningful engagement in technical committees. The World Bank reports participation by low-income countries in only 7% of active ISO technical committees, compared with 84% for high-income countries.[34] ISO's finding that 91% of its 8,600 technical meetings in 2025 were virtual or hybrid[35] indicates greater opportunities for engagement, although technical preparation and sustained participation remain essential. African participation should focus on standards affecting priority sectors and value chains, products of significant current or potential trade importance, emerging technologies and evolving market requirements.

Reducing unnecessary fragmentation creates value when it makes market opportunities usable while preserving legitimate protection. Businesses must still be able to meet the requirements that remain. Chapter 3 examines the productive, managerial and commercial capabilities needed to turn market access into sustained sales.



[33] The CAC, WOAH and IPPC

[34] World Bank, World Development Report 2025: Standards for Development, Washington DC, based on the World Bank–ISO survey of 116 national standards bodies, 2025.

[35] ISO in figures 2025. ISO recorded 8,595 technical meetings in 2025, of which 91% were held virtually or in hybrid mode.



CHAPTER 3 Achieving Quality: How African Businesses Can Compete and Win

CHAPTER 3 AT A GLANCE

- **Africa's export competitiveness starts with commercially viable market opportunities.** The AfCFTA and international markets offer opportunities for African producers, processors and manufacturers. Firms must identify customers and understand regulatory, buyer and sustainability requirements. Kenya's horticultural experience shows why pest management, product quality and buyer expectations must be addressed together.
- **Market access becomes sustained success when African enterprises can compete.** Businesses need productive capacity, skills, technology, finance, market intelligence and reliable logistics. Meeting market requirements is essential, but profitability depends on delivering consistent quality and quantity at competitive prices. These capabilities underpin Africa's transition towards processing, manufacturing and higher-value regional supply chains.
- **African MSMEs need practical, progressive pathways into export markets.** Supplying domestic processors or joining regional value chains can provide a stepping stone to direct exports. Producer organisations, aggregation and shared services help overcome constraints of scale and cost. TMA-supported farmer and packhouse upgrading in Kenya illustrates how technical assistance can connect smaller producers to market opportunities.
- **Market connections turn enterprise capability into repeat business.** Trade intelligence, buyer relationships and commercial partnerships help firms secure customers. Retaining them requires reliable delivery, competitive margins and adaptation to changing requirements. Enterprise-support programmes should track repeat orders, buyer retention and profitability alongside training and certification.
- **Competitive exporters depend on capable value chains and trusted institutions.** Unreliable inputs, inadequate packaging, limited storage, costly logistics and inaccessible testing can undermine otherwise capable firms. Stronger quality infrastructure, effective SPS systems and dependable border procedures must complement enterprise upgrading. Coordinated public–private action helps African businesses turn these investments into sustained trade.



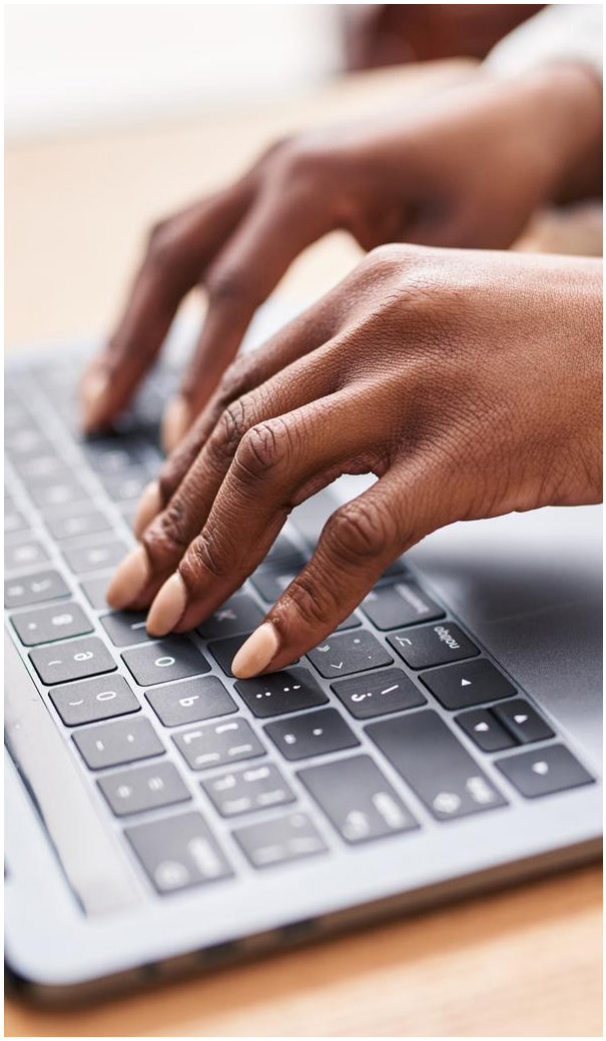
Knowing What the Market Needs

Understanding market requirements helps firms manage the risk of costly rejection. Export competitiveness begins with understanding the customer and the intended market. Pesticide residues, missing health certification or unsuitable packaging can prevent a consignment from reaching its buyer; commercial viability also depends on price, volume and dependable delivery. The following sections connect these requirements with the capabilities and finance firms need to fulfil orders.

Market intelligence needs to guide practical decisions. Exporters should understand distribution channels, competing offers and changes in regulatory and buyer requirements, as well as headline demand. Tools such as the African Trade Observatory can support this work, but firms still need product-specific analysis and contact with prospective customers.[36]

Different sectors face different combinations of requirements. A fresh-produce exporter needs to manage pesticide residues and phytosanitary risks while also satisfying buyer requirements on food safety, traceability, appearance and packaging. Fish exporters depend on competent-authority controls, health certification, cold-chain integrity and buyer assurance. Manufacturers face technical regulations relating to product safety and performance alongside buyer requirements concerning quality, delivery, sustainability and responsible sourcing. Understanding the complete combination is essential before an enterprise invests in upgrading or conformity assessment.

African businesses see opportunities in the AfCFTA, but many have yet to translate them into trade. The 2025 PAFTRAC Africa CEO Trade Survey highlights the gap between business expectations and participation in intra-African trade. Its findings describe the respondents' experience and should not be read as representative estimates for all African businesses.[37]



[36] ITC (2026), Trade and Market Intelligence Newsletter, Q2 2026.

[37] IPan-African Private Sector Trade and Investment Committee (PAFTRAC), Africa CEO Trade Survey Report 2025: Leveraging the AfCFTA in an Era of Global Trade Uncertainty, 2025.



SPOTLIGHT ON **AFRICA**

What African Businesses Are Telling Us

2,188 Executives	**51** African Countries	**55%** MSMEs	

50%	Do not currently export to other African countries	**43%**	Consider AfCFTA extremely important to protecting Africa's trade interests
43%	Do not currently import from other African countries		

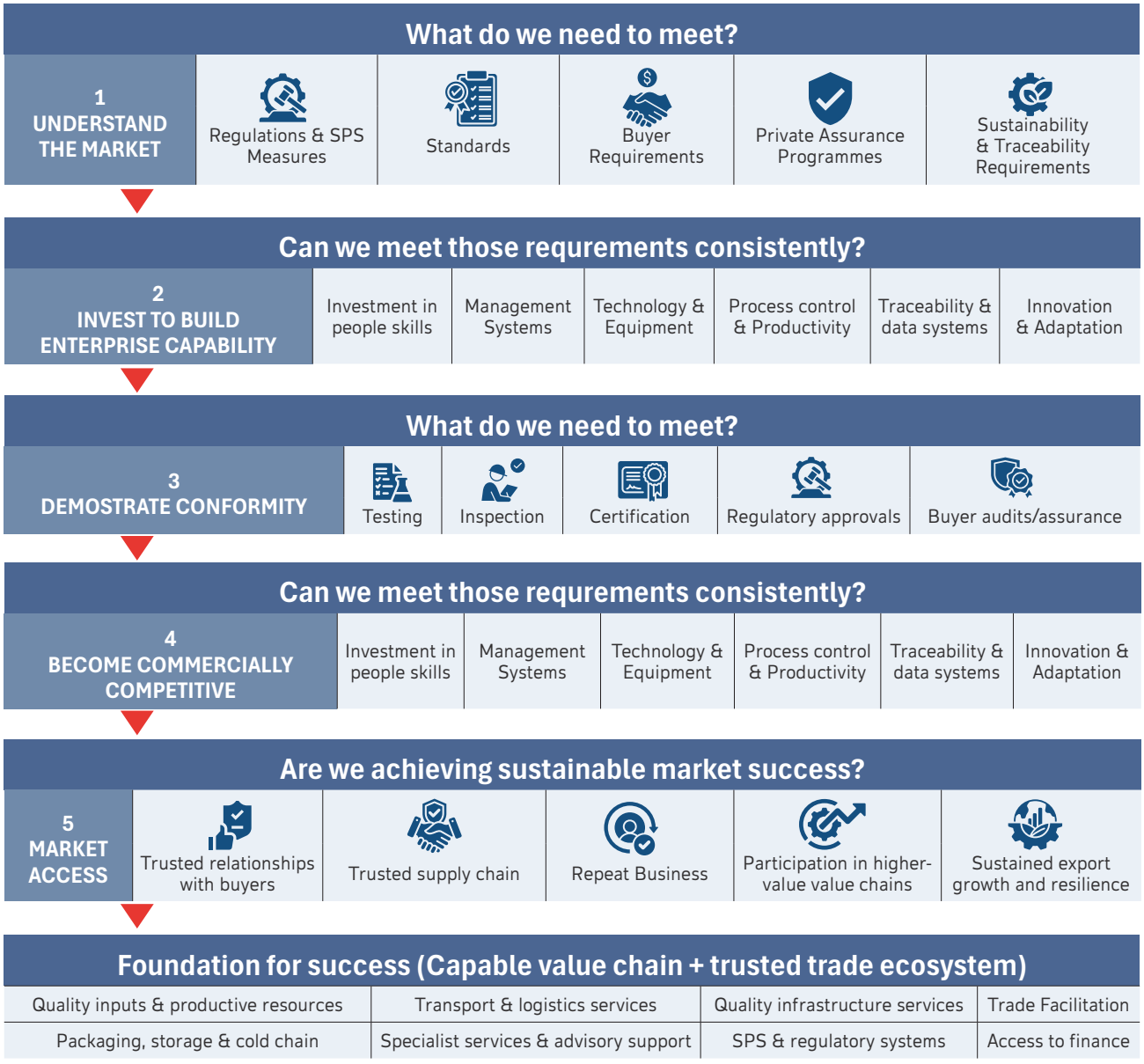
Source: PAFTRAC Africa CEO Trade Survey 2025. https://paftrac-media.afreximbank.com/2025/10/PAFTRAC25_Report-5.pdf

Certification contributes to export readiness alongside productive and commercial capabilities. Where required, it must cover the relevant product, process or system and be accepted by the intended regulator or buyer. Firms also need the people, technology, finance, logistics and management to deliver consistently. Investment in certification should follow the applicable requirements and commercial opportunity.

Buyer relationships help turn technical capability into sales. Export promotion, buyer–seller linkages and international partnerships can help firms test demand, understand specifications and negotiate viable orders. Businesses may also invest in capabilities while developing prospective customers; support should assess both the market opportunity and the risks.

From Market Access to Market Success

The Capabilities and Investments Enterprises need to Compete and Win



Meeting market requirements is necessary. Market success comes from the capability, investmet and partnerships that enable enterprises to compete, deliver value and grow.

Connecting market opportunity, enterprise capability and finance can make support more useful to firms. Market identification, technical assistance and finance address related needs: understanding demand, meeting requirements and funding production and delivery. Effective export support brings these elements together around enterprises and value chains with realistic prospects for sustained market success.

Building Enterprise Quality

Production and management practices provide the foundation for quality, supported by inspection and other assessment services. Reliable inputs, suitable equipment, trained workers, calibrated measurement, process control and corrective action enable enterprises to meet requirements consistently. Testing and certification provide evidence of specified characteristics and can help identify where production improvements are needed. The economic returns should be assessed through lower defects, reduced waste, higher saleable yield, improved delivery and repeat orders.

Quality improves competitiveness as well as helping enterprises to demonstrate conformity. Effective quality management can reduce waste, defects and failures while improving productivity, resource efficiency, innovation and responsiveness. Rather than simply a cost of meeting requirements, quality is an investment in operational performance and competitiveness. In a UNIDO study of 604 ISO 9001-certified organisations in Asian developing economies, 98% considered their investment in a quality management system worthwhile.[38]

Evidence also points to measurable performance gains. A study of manufacturing firms in Colombia found that adoption of ISO 9001 was associated with approximately 12% higher labour productivity and 8% higher sales per employee.[39] This also creates confidence throughout the value chain. Consistently meeting requirements reduces uncertainty and the need for repeated checking, strengthening confidence among regulators, buyers and consumers.

Technology strengthens quality and productivity, but adoption requires complementary capabilities. World Bank evidence associates the use of digital technologies by African enterprises with higher productivity, production and sales, while identifying gaps in adoption and intensity of use. [40] Digital readiness is increasingly part of export readiness. Exporters need to access standards and regulatory information online, maintain reliable digital records, use traceability tools, submit electronic certification or regulatory requests, receive alerts about changing requirements and share trusted evidence with buyers and competent authorities.

Innovation and continual improvement help enterprises remain competitive as markets change. Participation in regional and global value chains can accelerate this process by exposing enterprises to new technologies, knowledge, inputs and management practices.

World Bank research finds that deeper participation in manufacturing value chains can support technology transfer and productivity improvements, particularly through access to higher-quality inputs and know-how. [41]

[38] UNIDO (2012), ISO 9001 – Its Relevance and Impact in Asian Developing Economies, Vienna

[39] Inter-American Development Bank, Quality Management System and Firm Performance in an Emerging Economy: The Case of Colombian Manufacturing Industries. The study uses firm-level panel data to examine the relationship between ISO 9001 adoption and enterprise performance.

[40] World Bank (2023), Digital Africa: Technological Transformation for Jobs.

[41] World Bank (2021), Industrialization in Sub-Saharan Africa: Seizing Opportunities in Global Value Chains. The analysis identifies productivity and employment gains associated with participation in manufacturing global value chains and highlights the role of backward linkages in providing access to higher-quality inputs and technology transfer.

The intended market provides an important reference point for enterprise upgrading and decisions on certification. Firms should identify the customer, applicable mandatory requirements, buyer expectations and evidence needed for the transaction; assess whether their products and production systems can meet those requirements consistently; and use that assessment to determine which technical improvements, testing, inspection, certification or other forms of assurance are necessary and economically justified.

Different Roads to Market Success

The burden of meeting market requirements falls unevenly across enterprises. A large processor supplying an international supermarket chain may have an in-house quality team, established buyer relationships, access to specialist expertise and sufficient financial resilience to absorb delays or a rejected consignment. A smallholder supplying that processor, or a first-time exporter dependent on one buyer and one product line, is much more exposed. Requirements also differ substantially between sectors: a fresh-produce grower managing pesticide residues and phytosanitary risks faces different challenges from a garment manufacturer, fish processor or engineering company.

Smaller enterprises face greater challenges in demonstrating their capabilities to markets. Smaller firms face substantial barriers to formal assurance, but certification is an incomplete measure of readiness. The World Bank reports that across 51 countries, only 3.6% of small firms, 10.6% of medium-sized firms and 30.4% of large firms have achieved internationally recognised certification.[42] Support should address the capabilities and evidence demanded by the intended market.

Smaller producers may benefit from meeting buyer requirements, but upgrading costs can arise before additional income is earned. Studies of GLOBALG.A.P. adoption in sub-Saharan Africa and Kenya associate certification with commercial benefits while highlighting the importance of technical assistance, finance and the costs borne by producers. Support should assess the likely returns and affordability for the particular firm or producer group. [43] [44]



[42] World Bank Enterprise Surveys, country-level indicator extracts, dataset version 9.9 (2022). The underlying survey question asks whether the establishment has an "internationally recognized quality certification"; World Bank guidance gives examples including ISO certification and HACCP and excludes certifications recognised only nationally.

[43] Henson, S., Masakure, O. and Cranfield, J. (2011), "Do Fresh Produce Exporters in Sub-Saharan Africa Benefit from GlobalGAP Certification?", World Development, Vol. 39, No. 3, pp. 375–386.

[44] Asfaw, S., Mithöfer, D. and Waibel, H. (2009), "Investment in compliance with GlobalGAP standards: Does it pay off for small-scale producers in Kenya?", Quarterly Journal of International Agriculture, Vol. 48, No. 4, pp. 337–362

Access to standards and the capacity to implement them work together to support business value. Access enables enterprises to identify and obtain relevant standards, while absorption requires the technical, managerial and financial capacity to interpret requirements, integrate them into business processes, demonstrate conformity and sustain improvements. For African MSMEs facing implementation constraints, practical guidance, technical assistance and affordable conformity assessment services can complement access to standards—an issue also recognised in ISO/IEC guidance on incorporating MSME needs into standards development.[45]

The road to market success will therefore differ depending on the context of the enterprise and its target markets. For some MSMEs, the first step may be formalisation and participation in domestic or regional value chains; for others it is upgrading to meet the requirements of a particular export buyer. These pathways should also address barriers to participation, including access to digital technologies and skills, finance and specialist support, particularly for smaller enterprises and groups that may otherwise be under-represented in export markets. Producer organisations, cooperatives, industry associations and clusters can help smaller firms share the fixed costs of technical expertise, training, testing, traceability and other services. Shared arrangements must maintain clear responsibility for meeting requirements consistently.

Smaller enterprises need not export directly to benefit from international markets. Supplying an established exporter, processor, aggregator or lead firm can provide a viable route into value chains. The quality of participation should be assessed through prices received, payment reliability, margins, supplier retention and opportunities for upgrading.

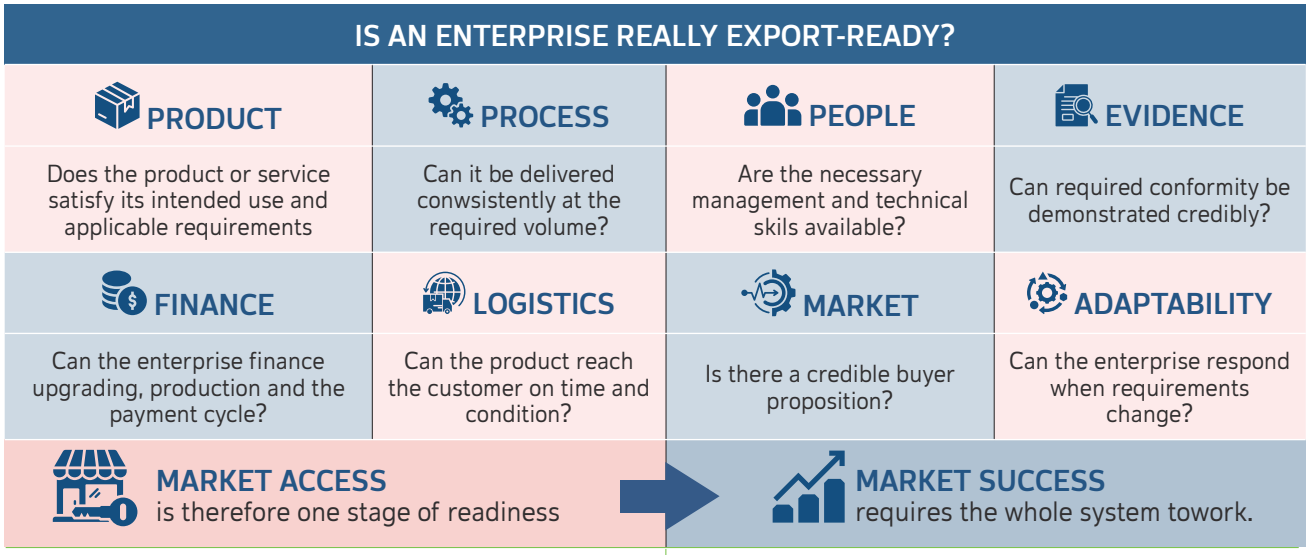
Progressive approaches can provide such pathways without lowering destination-market requirements. Stepwise programmes, producer groups and shared services can help smaller enterprises develop management practices, traceability and technical competence while spreading fixed costs.[46] Intermediate assessments should be presented as stages of development, not substitutes for certification or official approval where these are required. The pathway should help firms reach the assurance required and accepted by the intended regulator or buyer.

International partnerships can support capability-building as well as market entry. Relationships with buyers, lead firms, investors and joint-venture partners can provide access to technology, specialist expertise, production methods, market knowledge and distribution networks that would be difficult for an enterprise to develop alone. UNCTAD has highlighted the role that participation in global value chains can play in transferring knowledge and productive capabilities to developing-country firms.[47] Such relationships can therefore contribute both to immediate commercial opportunities and to longer-term enterprise upgrading.

[45] ISO/IEC Guide 17:2016, Guide for writing standards taking into account the needs of micro, small and medium-sized enterprises.

[46] Global Food Safety Initiative (GFSI) (2023), Global Markets Programme (GMaP).

[47] UNCTAD (2014), Economic Development in Africa Report 2014: Catalysing Investment for Transformative Growth in Africa.



Building Capability Through the Value Chain

Enterprise performance depends on the reliability of the whole value chain. Constraints in inputs, aggregation, packaging, storage or transport can affect an otherwise capable exporter. This is particularly important for food and agricultural trade within Africa. SPS risks do not stop at national borders, and weaknesses in pest and disease control, surveillance, traceability, cold chains or inspection can constrain both intra-African trade and access to international markets. Strengthening these capabilities can therefore serve two objectives simultaneously: making it easier and safer for African countries to trade food with each other, while building the capabilities needed to compete in higher-value export markets.

The same principle applies as African economies seek greater value addition and diversification into manufacturing. Moving into processed foods, construction materials and manufactured products requires reliable inputs, consistent specifications, process control and capable suppliers.

For example, regional harmonisation of cement and reinforcing-steel standards, supported by competent testing and acceptance of conformity assessment results, can enable manufacturers to supply construction markets across borders without unnecessary product adaptation or repeated testing. Similarly, transforming raw agricultural commodities into packaged foods requires stronger food-safety management, processing technology, packaging and quality assurance. The opportunity is to build competitive regional value chains in which common standards support economies of scale, industrial upgrading and trusted cross-border supply.

Packaging connects product quality with successful delivery. It must protect goods during handling and transport, preserve safety and quality, carry required information and meet buyer expectations. Fresh produce may need ventilation and compatibility with cold-chain handling; processed food may require suitable food-contact materials and reliable seals. Firms therefore need access to appropriate materials, design expertise and relevant testing.



SPOTLIGHT ON
KENYA

From Fruit-Fly Control to Export Markets:

Strengthening Kenya's Mango Value Chain

Kenya's mango sector illustrates how market access depends on more than the quality of individual consignments. Fruit-fly risks have historically constrained access to premium export markets, exposing growers and exporters to interceptions, additional controls and potential market restrictions. Overcoming these barriers requires coordinated pest surveillance, improved farm practices, traceability, aggregation, reliable inspection and effective official phytosanitary controls.

TradeMark Africa supported efforts to strengthen pest management, farmer training, traceability and export compliance in Makueni County, working across the value chain to help producers meet demanding market requirements and access higher-value opportunities.

Results for 2025:

- **4,900** tonnes of mango exports facilitated.
- **$5.3** million in reported export value.
- More than **7,000 farmers** supported in Makueni

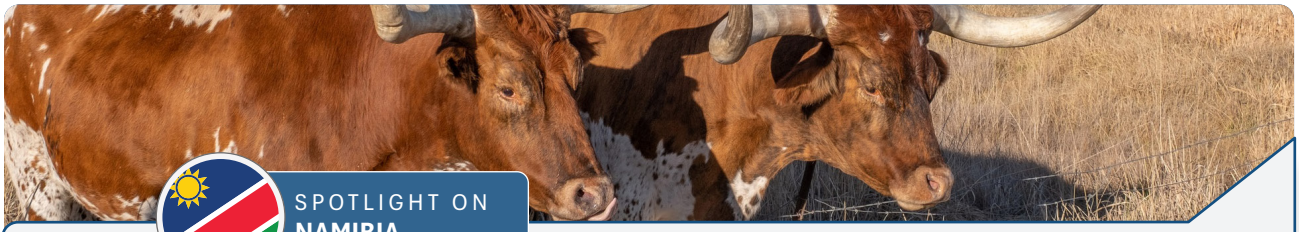
These results illustrate the commercial scale associated with coordinated value-chain support. They do not, however, establish that all reported exports were additional or directly attributable to TMA interventions. Nor do they demonstrate the net income earned by participating farmers or the proportion of buyers placing repeat orders. [48]

Source: and evidence qualification: TMA Kenya mango-sector programme reporting, 2025 (references 48–49).

KEY LESSON: Sustained market access requires more than meeting a technical requirement once. Coordinated public–private action—linking pest prevention, competent official controls, producer capabilities and reliable commercial relationships—can help turn regulatory compliance into export opportunities and strengthen the foundations for repeat business. [49]

[48] TMA, "How compliance with good agricultural practices is transforming Kenya's mango industry", 23 March 2026. Programme-reported exports and supported farmer numbers for 2025; these are not independently attributed impacts. www.trademarkafrica.com/how-compliance-with-good-agricultural-practices-is-transforming-kenyas-mango-industry/

[49] TMA Kenya mango-sector programme reporting, 2025 (references 48–49).



SPOTLIGHT ON
NAMIBIA

Namibia's Premium Beef Exports

A Holistic National Assurance System Building Trust Across the Value Chain

MARKET OPPORTUNITY. Access to high-value beef markets depends on credible assurance of animal health, identification, traceability and food safety across the entire value chain.

INTERVENTION. Namibia developed an integrated assurance system combining its Livestock Identification and Traceability System (NamLITS), farm-level assurance through FAN Meat; veterinary controls and disease management measures, including maintenance of a foot-and-mouth disease-free zone.

TRADE OUTCOME. This system supported Namibia's access to demanding international markets, including becoming the first African country eligible to export beef to the United States, with the first commercial shipment in 2020. A subsequent United States Department of Agriculture (USDA) review examined the animal-health controls supporting access.

LESSON FOR AFRICA: Market success can draw on exporter capability and trusted systems across the value chain. Producers and processors operate within a wider veterinary, traceability and official-control system whose credibility can determine access for the value chain as a whole

The assurance chain a premium market buys, and what each link proves to the buyer. [50]

The buyer knows where the animal was	The buyer knows what it was exposed to	The buyer knows who handled and inspected it	
Animal Identified	**Disease-free Zone**	**Assured Handling**	**Premium Market**
NamLITS traceability, run by the veterinary authority	FMD-free without vaccination, south of Cordon Fence WOAH-recognised	FAN Meat scheme: producers, transporters and export abattoirs	First African country to ship beef to the United States, 2020

From Enterprise Capability to a Trusted Trade System

A first successful shipment shows that a business can meet a set of requirements once. Sustained success requires it to repeat that performance, adapt to changing requirements and retain profitable customers. Training, certification and initial shipments are milestones; durable competitiveness is demonstrated through consistent quality, fulfilled orders, viable margins and reliable supplier relationships. Buyer relationships, finance and logistics turn these capabilities into sales. Chapter 4 examines how supporting services can provide reliable assurance that businesses can access and their markets accept.

[50] USDA APHIS, Report on the Review of Namibia's Foot-and-mouth Disease Status, review conducted in 2022.

CHAPTER 4 Demonstrating Quality: How the System Serves Business

CHAPTER 4 AT A GLANCE

- **Quality infrastructure serves businesses and consumers.** Its services help firms achieve and demonstrate that market requirements have been met. They provide confidence when they are relevant, technically competent and trusted by the intended buyer or authority.
- **Different service models can support reliable access.** Countries can draw on competent national, regional, public, academic and private providers according to demand, technical needs and institutional responsibilities. Regional and shared services, and appropriate use of competent public, academic and private providers, can reduce duplication and make better use of scarce resources.
- **Investment should respond to trade needs and be sustainable.** Quality Infrastructure and SPS capabilities should be developed around priority products, value chains, risks and market requirements, taking account of recurrent costs and international recognition – alongside the initial investment. Public–private partnerships can also help mobilise investment and specialist expertise where there is market demand.
- **Practical implementation helps realise the benefits of recognition.** Accreditation and mutual recognition arrangements support confidence in competence; business benefits depend on authorities and buyers accepting the relevant results without unnecessary repetition.



African businesses may meet market requirements yet struggle to obtain timely, affordable evidence that regulators and buyers accept. Chapter 3 examined how firms can achieve consistent quality and compete commercially to access markets both in Africa and internationally. This chapter examines the technical services, official controls and cross-border cooperation that help them demonstrate compliance and deliver reliably.

Businesses rely on these connected services and public systems: standards and technical regulations; measurement, testing, inspection and certification; and SPS authorities responsible for food safety and animal and plant health. Buyer assurance schemes, traceability, digital certification and coordinated border procedures also influence whether goods can reach their intended markets.

These functions create value when requirements are clear, services are accessible and affordable, and results can be used for the intended transaction. The practical test is whether businesses can demonstrate compliance at a reasonable cost and without unnecessary delay, while authorities maintain effective protection. The figure below shows how business capabilities, technical services and public systems work together to support market access and sustained sales.

Figure 4.1 — UNIDO model for a typical quality infrastructure system [51]



The Importance of Conformity Assessment

Businesses need to demonstrate that the products they sell meet the requirements of customers and regulators. Conformity assessment provides that evidence. It establishes whether specified requirements—set out in standards, regulations or contracts—have been met. For an exporter, this can make the difference between a shipment being accepted, held for further checks or rejected. For a buyer, it reduces uncertainty about the safety, quality and performance of the goods being purchased.

These services support business decisions as well as market access. Testing can help a processor check raw materials before using them, a manufacturer identify defects before dispatch, or a food exporter assess whether a consignment meets relevant contaminant limits. Inspection can identify problems with products, facilities or processes. Finding failures early allows businesses to correct them before they become spoiled consignments, customer disputes or lost orders. Assessment works alongside effective production and quality management to support reliable outcomes.

Conformity assessment includes laboratory testing, inspection, certification, validation and verification. Each serves a different purpose. Testing determines specified characteristics, such as the strength of a construction material or the concentration of a contaminant. Inspection examines whether a product, process or installation meets requirements. Certification provides independent assurance that a defined product, process, service or management system meets specified requirements. Validation and verification assess claims against defined criteria. Businesses need an assessment appropriate to their product, market and transaction—not necessarily every service or a certificate in every case.

[51] UNIDO (2026), Quality Policy – Guiding Principles, p 18, Vienna: UNIDO.

Assessments can involve different parties. A supplier may undertake checks and issue a declaration supported by evidence (first party). A buyer may assess its supplier (second party). An independent organisation may undertake assessment (third party). Certification is specifically a third-party activity. The applicable regulations, buyer requirements and assessment scheme determine which approach is acceptable. A supplier's declaration cannot replace independent assessment where that is required.

Reliable measurement underpins both production and assessment. Firms need accurate measurements to control processes, meet specifications and determine quantities; laboratories need them to produce dependable results. Calibration establishes how an instrument's readings relate to reference values. Metrological traceability connects measurement results to recognised references through a documented calibration chain. This differs from product traceability, which follows goods and their histories through a supply chain.

Competence, accreditation and market acceptance are related but distinct. A laboratory must be capable of performing the particular test a business needs. Accreditation provides independent assurance of competence within a defined scope; it does not cover every possible test or product. Nor does accreditation automatically require every regulator or buyer to accept the result. Before commissioning an assessment, a business should establish which requirements apply, what evidence is needed and whether the intended recipient will accept the provider's report or certificate.

The level of assessment should match the risks and applicable requirements. Products with serious safety implications may require more intensive assessment than lower-risk goods. Authorities can consider product characteristics, an operator's compliance history and the reliability of existing controls when deciding where to focus checks. Buyers may also consider supplier performance and contractual requirements. Where the rules permit, a consistent record of compliance can support less frequent assessment, while additional scrutiny is directed towards higher-risk products or poorer-performing operators. Good performance can reduce unnecessary duplication, but it does not remove mandatory obligations.

Services may be provided by public agencies, private organisations, universities or other competent institutions. For businesses, the practical questions are whether the required service is accessible, affordable, timely and accepted in the intended market. Investment in staff, maintenance, consumables and continuing technical competence complements equipment provision. For exporters, proximity is most useful when the required tests can be performed reliably within shipment timelines.



Conformity assessment also supports official controls, including food-safety, animal-health and plant-health systems. Testing and inspection provide evidence for decisions, while competent authorities retain responsibility for the controls and official assurances within their mandates. Coordination between these authorities and border agencies helps ensure that valid results inform decisions without unnecessary repeated sampling, testing or document submission.

SPS capability supports prevention, early detection and effective responses to health risks. Risk analysis, surveillance and early warning should connect with inspection, diagnosis, emergency response and corrective action. Traceability and recall arrangements help authorities and enterprises identify affected products and contain food-safety incidents, while contingency measures address pest and disease outbreaks. Relevant Codex, WOAH and IPPC standards and guidance provide reference points for these functions, adapted to applicable risks and institutional responsibilities.

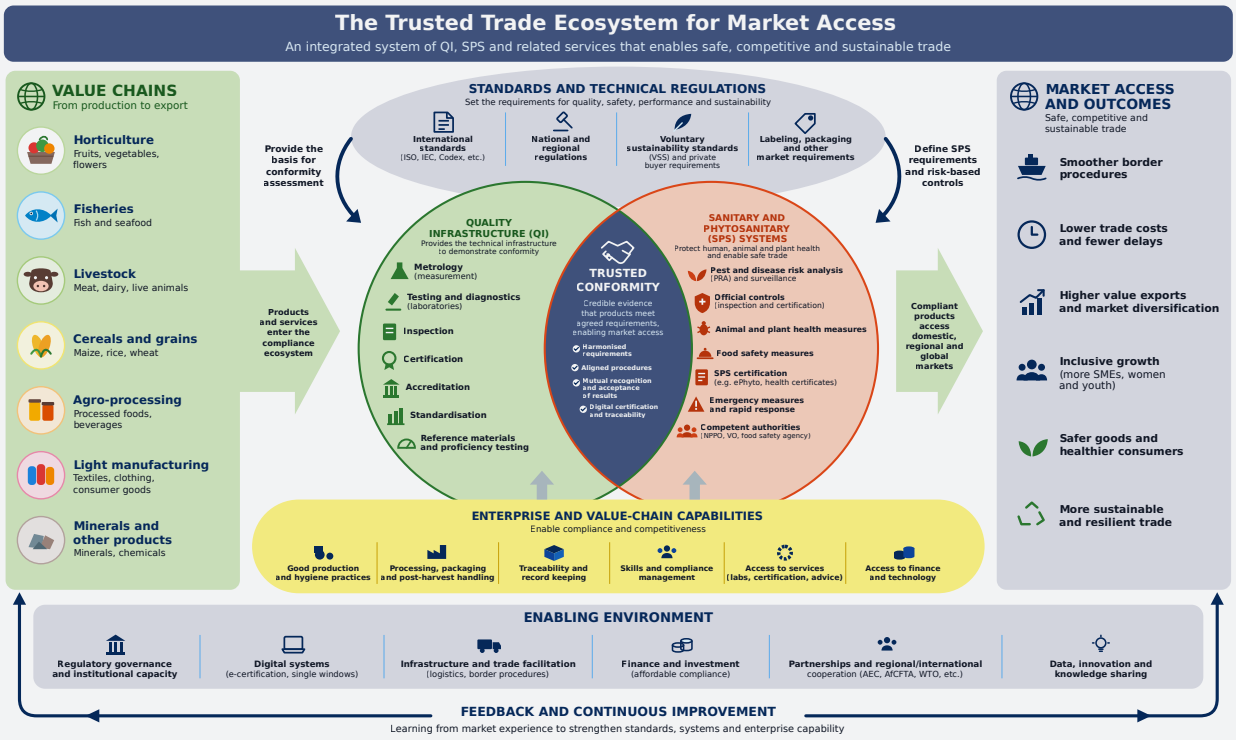
Coordinated border decisions help authorities and businesses make effective use of trusted evidence. Customs, SPS and other regulatory agencies should clarify their respective requirements, share relevant information and coordinate inspections where feasible. Implementation should draw on the WTO Trade Facilitation Agreement and relevant AfCFTA provisions to improve transparency, reduce unnecessary repeated submissions and expedite lower-risk consignments. Practical priorities include interoperable single windows, pre-arrival processing, electronic SPS certification, coordinated agency decisions and measurable reductions in avoidable delays. Coordination must preserve each authority's protection responsibilities and the controls required by applicable law.

Different institutions have distinct and legitimate responsibilities. Where their procedures are not well connected, businesses may encounter repeated forms, separate inspections or uncertainty over consignment release. Customs, standards, food-control, veterinary and plant-health authorities should make their respective requirements clear and coordinate inspections where feasible. Traders should know which information can be submitted once, which checks remain necessary and who is responsible for the next decision.

The commercial value is realised when reliable evidence leads to a usable decision. Effective conformity assessment helps businesses detect problems earlier, demonstrate compliance, protect customer relationships and reduce the risk of costly rejection. Its performance should therefore be judged by the reliability and usefulness of its results, as well as the time and cost involved in obtaining them.



"Figure 4.2 — The trusted trade ecosystem".



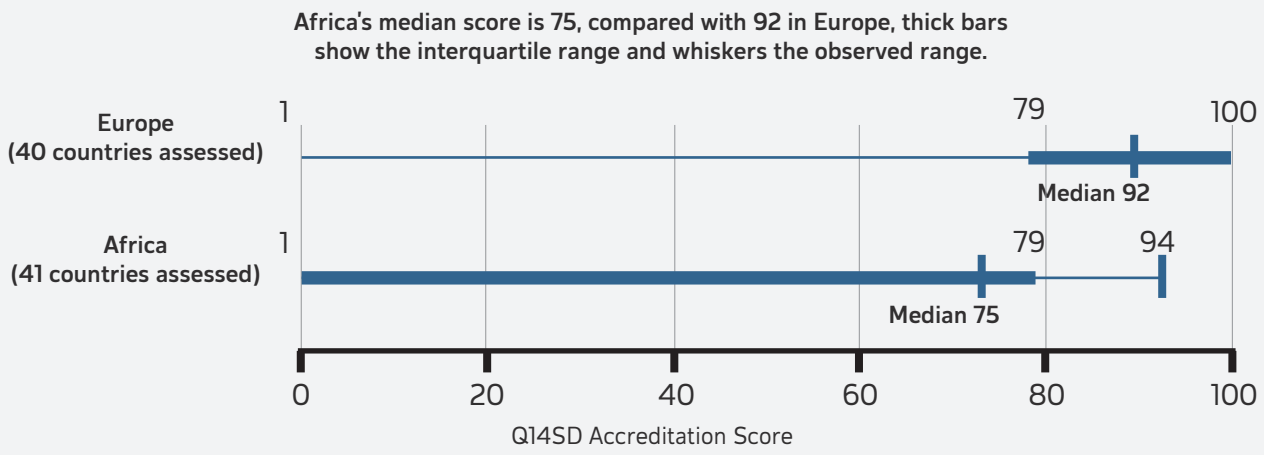
The African Context

Africa's SPS assurance systems have developed in different institutional and resource settings, and service capacity varies. For African businesses, an important practical consideration is access to the particular service their product and market require. A country may have a laboratory, but its testing methods may not cover the relevant contaminant, samples may need to travel long distances, or results may arrive too late for shipment. Public systems also matter. The AU noted that no reporting Member State was on track against its fully functional SPS systems indicator[52] (though this points to gaps in system performance, rather than an absence of all functioning services).[53]

[52] Fourth CAADP Biennial Review

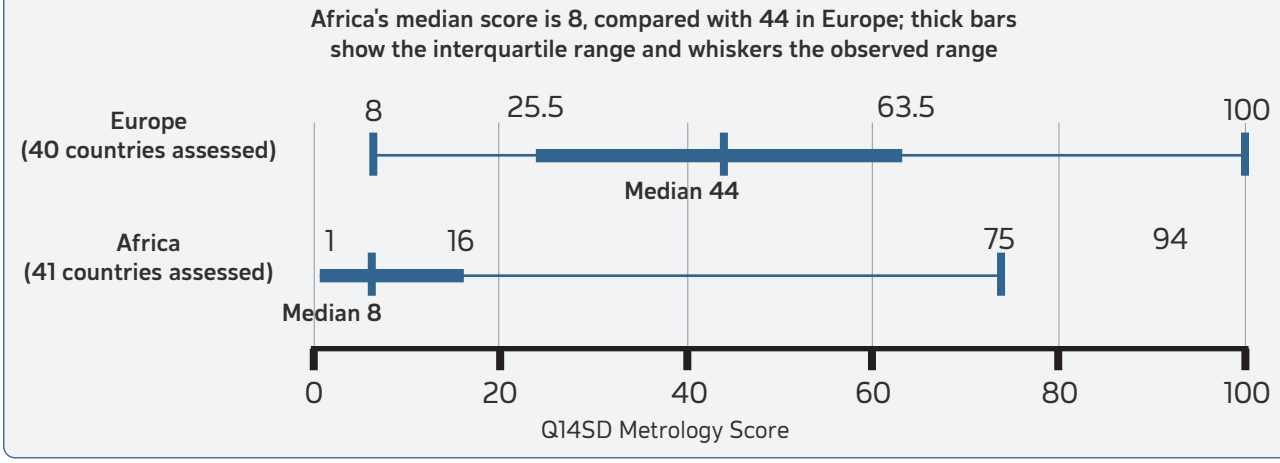
[53] AU Commission, Fourth CAADP Biennial Review Report (2024), SPS Systems Indicator.

Figure 4.3 — Access to internationally recognised accreditation varies widely across Africa



There are significant differences in institutional capability across countries. Median metrology scores were eight for Africa and 44 for Europe; only ten of the 41 African countries recorded Calibration and Measurement Capabilities. For businesses, the consequence of a capability gap may be having to send instruments or samples abroad, wait longer for results or buy specialist services at greater expense. Investment decisions therefore need product- and service-level evidence alongside national indices.[54]

Figure 4.4 — National metrology capacity varies widely across Africa



Ethiopia's rose sector illustrates the need to connect technical services with effective controls. TMA-supported work implemented by CABI combined grower training, improved pest management and competent-authority coordination.

Assessing sustained results requires interception data alongside shipment volumes and inspection intensity.[55]

[54] UNIDO/INetQI (2025), QI4SD Index Results Report, 2024 data. Calculations based on reported dimension scores for 41 African and 40 European countries.

[55] TMA/CABI, Ethiopia floriculture programme reporting.



SPOTLIGHT ON
ETHIOPIA

Protecting Market Access for a $470 Million Cut-Flower Export Industry

False Codling Moth (FCM) interceptions posed a serious risk to Ethiopia's access to European rose markets. Repeated interceptions can trigger intensified inspections, higher compliance costs and potentially restrictive regulatory action, threatening the commercial viability of a major export industry. Ethiopia's cut-flower exports were reportedly valued at approximately **$470 million in 2023/24,** highlighting the economic importance of maintaining credible phytosanitary controls to ensure continued access to international markets.

With funding from the European Union (EU) through AFD, a TMA supported programme implemented by CABI worked with the Ethiopian Agricultural Authority, the Ethiopian Horticulture Producer Exporters Association and rose growers to strengthen pest prevention, surveillance and official assurance.

The programme developed practical training manuals and pest-identification guides, strengthened inspection and surveillance capabilities, and supported coordinated pest management from farm to export. Programme reporting records **268 growers and plant-quarantine experts trained**, with improved pest-management practices supported across **40 rose farms**.

These interventions strengthen the systems needed to reduce interception risks and maintain confidence in Ethiopian rose exports. Their value lies not only in addressing individual consignments, but also in supporting the credibility of the wider export-control system.

KEY LESSON: Protecting high-value agricultural exports requires coordinated action across producers, technical service providers and competent authorities. Prevention, surveillance, inspection and credible official controls are essential to sustaining market confidence and avoiding costly disruptions. [56]

[56] TMA Ethiopia floriculture programme reporting; reported Ethiopian cut-flower export value for 2023/24. The $470 million figure describes the wider cut-flower sector and is not an estimate of rose exports to Europe or exports saved by the intervention. The training and farm figures are programme-reported. The intervention's causal effect on interceptions, export earnings and avoided restrictions has not been independently established

Malawi's experience illustrates how national testing capability and regional accreditation can work together. The figures in the spotlight use the programme's category "testing scopes"; they do not count laboratories or imply acceptance of every result in every market. Coverage should be checked against the relevant SADCAS schedules. The time and cost savings are projections, not measured results. Regional accreditation is one option for supporting national capability, depending on institutional needs and demand. [57]



SPOTLIGHT ON **MALAWI** | LABORATORY CAPACITY STRENGTHENING

Malawi Builds Recognised Testing Capability through Regional Accreditation

MARKET OPPORTUNITY. Malawian exporters of products including macadamia, mango, groundnuts, soybeans and honey require testing that is accepted in destination markets. In the absence of suitable accredited domestic capability, samples had to be sent to laboratories elsewhere in the region, adding cost and delay.

INTERVENTION. Between 2020 and 2024, TMA together with other development partners equipped Malawi Bureau of Standards laboratories to test for mycotoxins, pesticide residues, heavy metals and microbiological contamination, and relevant testing capabilities were accredited to ISO/IEC 17025 by SADCAS, the regional accreditation body.

TRADE OUTCOME. More than 44 testing scopes were accredited, with further scopes under development, expanding Malawi's ability to provide internationally recognised testing domestically for priority export products. The upgraded services are expected to reduce average testing turnaround times from around 17 days to seven; and testing costs by up to 40% compared with regional laboratories.

LESSON FOR AFRICA: Countries do not need their own accreditation bodies to develop internationally recognised national capabilities. Regional accreditation can support market-driven quality infrastructure development while avoiding unnecessary duplication of institutions. [58]

44 Testing scopes accredited **106** Undergoing accreditations.

[57] TMA, Malawi Bureau of Standards Accreditation Factsheet, implementation period 2020–2024, accessed 30 October 2026. The factsheet reports more than 44 "testing scopes" accredited and 106 in progress; these are programme categories, not counts of laboratories. Savings of 17 to approximately seven days and up to 40% are projected. Consult current SADCAS schedules for the exact accredited activities.

[58] TMA, Malawi Bureau of Standards Accreditation Factsheet (2020–2024). Accreditation scopes should be confirmed against the applicable SADCAS schedules.

Policy frameworks help organise these services, and engagement with firms can inform their implementation. In UNIDO's 2024 QI4SD survey, 15 of 20 African respondents to the implementation question reported a plan, while ten of 20 respondents to the review question reported periodic review arrangements. These findings concern responding countries, not all African countries. Business associations can help turn plans into practical priorities by identifying unavailable tests, recurring delays and cases where valid reports are rejected.[59]

A useful quality policy clarifies which institution is responsible, how essential functions will be financed and how users can report problems. Its success should be visible in accessible services, predictable procedures and effective protection. Regular consultation with exporters, manufacturers, growers and smaller suppliers helps keep implementation focused on demand.[60]



[59] UNIDO, QI4SD Index – Indicator Data 2024, Quality Policy indicators; calculations from the publicly available country-level dataset. UNIDO QI4SD Indicator Data 2024

[60] UNIDO, 2026, Quality Policy – A Practical Tool, Vienna

Credibility Matters

Credibility of the national control system is as important as the capability of an individual exporter. Market access depends on confidence in competent authorities, inspection, laboratories, surveillance, traceability and official certification. Constraints in one element can have implications across a value chain. Where importing authorities or buyers require further assurance, additional verification may increase costs. Coordinated improvements help address the underlying concerns and support continued investment in capability.



AFRICAN POLICY EVIDENCE | **GHANA**

Restoring Vegetable Exports through Stronger Phytosanitary Controls

Ghana's experience demonstrates how weaknesses in national SPS controls can jeopardise an entire export sector—and how coordinated reforms can help restore market confidence.

Following 330 reported EU interceptions of harmful organisms in 2014, exports of specified Ghanaian vegetables were suspended from 2015. Ghana's Plant Protection and Regulatory Services Directorate, working with TMA and CABI and supported by Dutch funding, strengthened pest management, grower practices, packhouse controls, inspection and official export certification.

The EU restrictions were lifted in January 2018. Reported interceptions subsequently declined to 11 in 2020, while vegetable exports valued at approximately US$15 million annually resumed.

POLICY LESSON: Market recovery required improvements across the entire assurance chain—not certification by individual exporters alone. Competent authorities, producers and packhouses had to work together to demonstrate credible phytosanitary controls. [61]

Source: European Commission, Europhyt interception records (2014 and 2020); CABI, Phytosanitary System Development for the Vegetable Sector in Ghana (2015–2021).

[61] European Commission, Europhyt interception records (2014 and 2020); CABI, Phytosanitary System Development for the Vegetable Sector in Ghana (2015–21)

Institutional integrity is necessary for assurance to be dependable. Clear mandates, impartial assessment and management of conflicts of interest protect confidence in regulatory and conformity assessment decisions. Where institutions combine regulatory responsibilities with commercial services, safeguards should preserve impartiality and prevent inappropriate incentives. Enterprises should receive clear reasons for adverse decisions and have access to applicable complaint, appeal or review procedures.

Greater confidence can reinforce investment and trade performance. When credible evidence is trusted and accepted, unnecessary verification can be reduced, lowering costs and improving competitiveness. Stronger trade performance can in turn support further investment in enterprise capability and Quality Infrastructure.

Serving the Needs of Business

Businesses need technical and regulatory services they can use with confidence. Before commissioning a test or inspection, they should be able to establish the technical scope, sample requirements, full fee, expected completion date and whether the result will be accepted in the intended market. Providers should publish this information, explain delays and offer a clear process for resolving disputed results.

Businesses also need a service that is affordable. The total cost extends beyond the laboratory fee. Transporting samples, storing goods and financing a shipment while awaiting a decision can be more expensive than the assessment itself. Smaller firms are particularly exposed when they have limited working capital or small consignments. Performance should therefore be measured from the user's perspective: the time and cost of obtaining an acceptable result, including sample delivery and any necessary repeat work.

For example, an exporter planning a shipment needs more than confirmation that a laboratory is accredited. It needs the correct method, enough sample material, a reporting date that fits the shipping schedule and confirmation that the intended buyer or authority will accept the report. A service designed around these decisions is more useful than a general list of laboratory capabilities.

Bringing appropriate testing closer to trade flows can improve access to services. Nakonde illustrates this approach at a border; Uganda's regional laboratories in Gulu, Mbale and Mbarara extend it to production areas and trade corridors. With Danish funding through TMA, UNBS expanded regional testing capability and received support for accreditation to ISO/IEC 17025. Programme reporting records an increase from 340 samples tested in 2023 to almost 1,800 in 2025. This indicates greater service use; the business benefit also depends on the tests available, turnaround time, total cost and acceptance of results in the intended market.[62]

[62] TMA /UNBS, regional laboratory programme reporting, 2022/23–2024/25; source attribution retained from the supplied publication. Sample counts are programme-reported.



SPOTLIGHT ON
ZAMBIA

Zambia Takes the Laboratory to the Border

MARKET OPPORTUNITY. Zambia's 2023/24 drought, the worst in four decades, cut the maize harvest by about half, forcing the government to import 650,000 tonnes of maize from Tanzania. Much of it crossed at Nakonde, Zambia's busiest border with Tanzania. Consignments had to be screened and tested for contaminants, including aflatoxins, with samples sent to Lusaka, with testing typically taking up to 72 hours, adding costs and delays to urgently needed grain.

INTERVENTION. With support from TMA and FAO, funded by the UK, the Plant Quarantine and Phytosanitary Service (PQPS) laboratory at Nakonde was refurbished and equipped as part of the wider upgrading of the One Stop Border Post, bringing SPS testing capability to where the goods actually cross the border. PQPS and Tanzania's Plant Health and Pesticides Authority also agreed a bilateral SPS protocol, harmonised diagnostic and surveillance procedures and government-to-government pre-shipment inspection, and trained over 60 frontline officers.

TRADE OUTCOME. Testing turnaround fell from approximately 72 to 30 hours, a reduction of 58%, saving time and logistics costs. During its pilot phase, the laboratory screened more than 2,400 tonnes of maize and doubled testing throughput compared with pre-upgrade levels.

LESSON FOR AFRICA: Quality Infrastructure and border controls are more effective when designed around trade flows. Locating appropriate testing capability at strategic borders can reduce delays without weakening SPS assurance — particularly when rapid clearance matters most. [63]

[63] TMA , Annual Report 2024–2025, p. 31. Reported testing turnaround: approximately 72 to 30 hours; pilot volume: more than 2,400 tonnes. This is not a measure of total border clearance.

Digital systems help when they reduce the work required to complete a transaction. An electronic report or certificate must be authentic, contain the required information and be usable by the receiving authority. Agencies need agreed data definitions, verification procedures, security safeguards and arrangements for corrections or outages. Businesses benefit when these arrangements remove duplicate data entry and unnecessary paper submissions; converting forms into electronic files can be an initial step towards these wider improvements.

Business participation should continue after a service or system is launched. Exporters and service providers can review recurring delays, rejected reports and failed transactions together, while competent authorities retain responsibility for regulatory decisions. This creates a practical way to identify whether the problem lies in the requirement, the assessment, the document or its acceptance.

Transparent eligibility conditions help businesses understand risk-based treatment. Authorities should explain how compliance history informs checks and monitor faster processing alongside continued control of the relevant risks. [64]

Building Quality Infrastructure around Value Chains

Reliable assurance depends on connected capabilities across the value chain. Producers and processors need effective production controls, supported by appropriate testing, measurement, inspection and certification. For food and agricultural exports, market access may also depend on surveillance, traceability and official controls extending beyond the individual business. A weakness at any critical point can disrupt trade even when an exporter's own operations meet the required standards. [65]

Technical services and competent authorities perform complementary roles. Quality infrastructure provides measurement and assessment evidence, while food-safety, veterinary and plant-health authorities exercise their regulatory responsibilities. Codex Alimentarius, WOAH and the IPPC provide international reference standards and guidance for these SPS functions. Their application should reflect the product, relevant risks and destination-market requirements, with clear responsibilities for businesses and public institutions.

Uganda's fisheries sector illustrates how these functions work together. A processor's factory hygiene and satisfactory test results must be supported by effective controls at landing sites, inspection, traceability and official assurance. Working with LVFO and with Mastercard Foundation funding, TMA supported procedures, training for inspectors and industry quality-assurance managers, and stronger hygiene practices. This work supports ongoing fisheries assurance; and builds on Uganda's historical restoration of EU market access.[66]

[64] OECD (2012), Recommendation of the Council on Regulatory Policy and Governance, OECD Publishing, Paris, Recommendation 9, particularly 9.4–9.5; see also OECD (2018), OECD Regulatory Enforcement and Inspections Toolkit, Criterion 3: Risk Focus and Proportionality.

[65] WOAH, International Standards, including the Terrestrial and Aquatic Animal Health Codes: www.woah.org/en/what-we-do/standards/. See also the Codex and IPPC references in this section.

[66] European Commission, audit 2022-7458 (2022); TMA–LVFO fisheries SPS programme reporting. Sources retained from the supplied Uganda fisheries spotlight.



SPOTLIGHT ON
UGANDA

Safeguarding Fish Exports through Stronger SPS Assurance

MARKET CHALLENGE: EU restrictions on Uganda's Nille perch exports in the late 1990s exposed weaknesses in sanitary controls, disrupting trade and highlighting the need for credible fisheries assurance.

TMA SUPPORT: With LVFO and funding from the Mastercard Foundation, TMA helped:

- Review the aquatic animal health annex to the EAC SPS Protocol
- Develop standard operating procedures (SOPs)
- Train fish inspectors and quality assurance managers
- Strengthen hygene and food-safety practices at landing sites and across artisanal and industrial fisheries

Strengthening the fisheries assurance chain

Landing Sites	Processing	Inspection & Controls	Trusted Markets
Hygene & Handling	Food Safety and Quality	Trained Iinspectors SOPs and Oversight	Continued and safer fish exports

TRADE SIGNIFICANCE: These interventions strengthen the regional and national assurance systems that underpin continued fish exports. A 2022 European Commission audit examined Uganda's official controls for fishery products.

KEY LESSON: Winning back a market requires credible controls; keeping it requires continuous investment in competent regulators, responsible businesses and coordinated SPS systems.

Source: European Commission, audit 2022-7458 (2022); TMA-LVFO fisheries SPS programme reporting, supported by the Mastercard Foundation. Programme acrivities require confirmation against implementation records; no quantified export impact is attributed to TMA.

Investment should address the weakest links in commercially important value chains. Depending on the constraint, this may involve better farm or factory practices, laboratory capability, sampling and inspection, traceability or coordination between authorities. Public institutions and businesses should identify these needs together.

Progress should be judged by reliable assurance, fewer avoidable disruptions and sustained market access, alongside the technical improvements delivered.

Rejection data can help identify where improvement will make the greatest commercial difference. Authorities and industry should examine the products, destinations, causes and shipment volumes involved, distinguishing documentation errors from contamination, pests or other failures. The response may require better production practices, a different test, improved inspection or clearer documentation. Raw rejection counts should not be interpreted without considering the volume of trade and changes in inspection intensity. Systematic analysis of rejection data, such as UNIDO's border rejection analytics for major markets, can show where targeted capability improvements and investment could offer particular benefits.

The Importance of Mutual Recognition

Recognition arrangements create value when results are accepted in practice. They do so by establishing which results may be relied upon and under what conditions. For an exporter, the usefulness of a test report depends on its acceptance in the destination market. Businesses need to know which products and tests are covered, which providers are eligible, which authorities accept the results and how to resolve a refusal. For African exporters, a practical objective is therefore wider acceptance of technically valid results within agreed scopes and applicable regulatory requirements.[67]

A defined product and assessment need provides a practical starting point for recognition. Participating authorities should identify the applicable technical requirements, relevant products, conformity assessment procedures, competent bodies and decision-making powers. Arrangements must establish how results are verified, accepted, monitored and, where necessary, suspended. Accreditation recognition can strengthen confidence in competence but does not itself guarantee regulatory acceptance.

Effective implementation requires clear procedures, confidence in participating bodies and communication between providers and regulators. The AfCFTA's framework for cooperation on TBTs provides a foundation for this work. Accreditation arrangements, including the Global Accreditation Cooperation Incorporated (Global ACI) framework, also support confidence in the competence of assessment bodies within defined scopes.

Regional implementation should be measured through actual transactions. EAC and COMESA experience provides a foundation for product-specific cooperation. Success should be assessed through results accepted, unnecessary tests avoided, costs reduced and legitimate safeguards maintained. Recognition and SPS cooperation should therefore be developed around defined products, risks and trade routes. Producers and traders can identify where differing requirements or repeated controls interrupt trade; authorities determine the technical and legal conditions for addressing those problems. Success combines fewer avoidable delays with effective protection of consumers, animals and plants.

[67] Global Accreditation Cooperation Incorporated, launch statement, January 2026. Full operations and the Multilateral Recognition Arrangement commenced on that date.

Food and agricultural trade require specific cooperation on SPS measures. Equivalence means accepting a different measure when the exporting country objectively demonstrates that it achieves the importing country's required level of protection. Regionalisation takes account of pest or disease conditions in particular areas. These are distinct from accepting a laboratory certificate and require the relevant scientific evidence and competent-authority decisions. For firms, effective cooperation can make safe food trade more predictable while retaining essential safeguards.

How Should Investment Happen

Joint assessment of service needs can help guide investment choices. A service may be unavailable, outside the required technical scope, geographically inaccessible, too costly, too slow or unacceptable to a destination authority. Depending on the circumstances, responses may include new capability, upgrading, regional service access, improved sample logistics, better procedures or recognition arrangements. Investment appraisal should compare feasible alternatives against trade demand, legitimate risks, full life-cycle costs, expected utilisation and measurable outcomes.

National and regional service provision can offer complementary ways to meet business needs. Regional accreditation through Southern African Development Community Accreditation Service (SADCAS) is one example of shared institutional provision. Similar investment decisions should examine whether firms can obtain a dependable service through existing national or regional providers. Authorities retain responsibility for their regulatory mandates and official controls, even where technical services are shared.[68]

Malawi illustrates how national testing capability can be supported by regional accreditation. Support to the Malawi Bureau of Standards combined improvements in testing services with accreditation through SADCAS. The practical value for businesses depends on whether the accredited scope covers the tests they need and whether their destination authorities or buyers accept the results. Investment should therefore combine technical capability with adequate staffing, maintenance and operating finance, and assess progress through service use, turnaround time and costs. Any anticipated time or cost savings should remain clearly identified as projections until measured.[69]



[68] SADCAS, Our Story, accessed 13 August 2026.

[69] TMA, Malawi Bureau of Standards Accreditation Factsheet, implementation period 2020–2024; source cited in the earlier full publication. Consult SADCAS schedules for the precise accredited activities.

Equipment investment and operational support are complementary. An assessment in Mozambique identified scope to make greater use of existing equipment by addressing staffing and maintenance constraints. Mapping public, academic and private providers can reveal opportunities to share services alongside options for new equipment investment. Investment plans must cover personnel, maintenance, calibration, consumables, proficiency testing, accreditation and eventual replacement. Public–private partnerships can contribute expertise and resources where viable, provided responsibilities, impartiality, service standards and continuity are protected.

Table: Measuring How Quality Infrastructure and SPS Services Support Trade

Performance Dimension	Suggested Measure
Access	Total time and cost to obtain the required service
Competence	Valid technical scope, proficiency and reliability
Utilisation	Actual business users and transactions
Protection	Risk-adjusted compliance and control effectiveness
Recognition	Results accepted without unnecessary repetition
Business outcome	Costs avoided, transactions completed, market retention
Sustainability	Service continuity, maintenance and recurrent financing

Demonstrated performance can help guide Africa's quality and SPS investments. Equipment installed, laboratories accredited and digital systems launched are important milestones. Complementary evidence on service use, acceptance of results, risk management and business experience can help assess their wider contribution. A common performance framework can support informed investment, institutional accountability and shared learning across countries and regional economic communities.

In summary, businesses need technically reliable services that deliver results accepted in their intended markets, at a predictable cost and within a useful timeframe. These services must also support effective protection of consumers, animals and plants, helping compliant firms maintain market access. The performance measures above connect institutional investment with these outcomes. Chapter 5 turns these priorities into proposed responsibilities, delivery commitments and measures of progress.



CHAPTER 5 Seven Pathways to Competitive African Trade

From Institutional Reform to Business Results

African businesses benefit from trade agreements when they can sell into new markets, obtain reliable services and deliver orders at a competitive cost. The preceding chapters identify opportunities to support this process: improving clarity and compatibility of requirements, strengthening business capabilities, and making assessment and approval procedures more predictable. Effective Quality Infrastructure and SPS systems help address these constraints while protecting consumers, animals and plants.

Africa already has important foundations for action. Annex 6 of the AfCFTA Protocol on Trade in Goods addresses TBTs, including cooperation on standards, technical regulations and conformity assessment. Annex 7 addresses SPS measures, supporting trade while safeguarding human, animal and plant life and health. These frameworks provide routes for aligning requirements, cooperating on controls and making credible evidence usable across borders.[70]

Regional arrangements provide practical starting points. The East African Community (EAC) has a legal framework for standardisation, quality assurance, metrology and testing. [71] The Southern African Development Community (SADC) has technical-barriers-to-trade and SPS annexes to its Trade Protocol. [72] The Common Market for Eastern and Southern Africa (COMESA) is supporting bilateral recognition, including the Zambia–Malawi conformity assessment agreement signed in August 2025.[73]

[70] African Union (AU), Agreement Establishing the African Continental Free Trade Area, Protocol on Trade in Goods, Annex 6 (Technical Barriers to Trade) and Annex 7 (Sanitary and Phytosanitary Measures)

[71] East African Community (EAC), East African Community Standardisation, Quality Assurance, Metrology and Testing Act, 2006

[72] Southern African Development Community (SADC), Protocol on Trade, Annex on Technical Barriers to Trade (17 July 2014) and Annex VIII on Sanitary and Phytosanitary Measures.

[73] Common Market for Eastern and Southern Africa (COMESA), e-COMESA Newsletter, Issue 759, 15 August 2025, reporting the conformity assessment agreement signed by Zambia and Malawi on 11 August 2025.

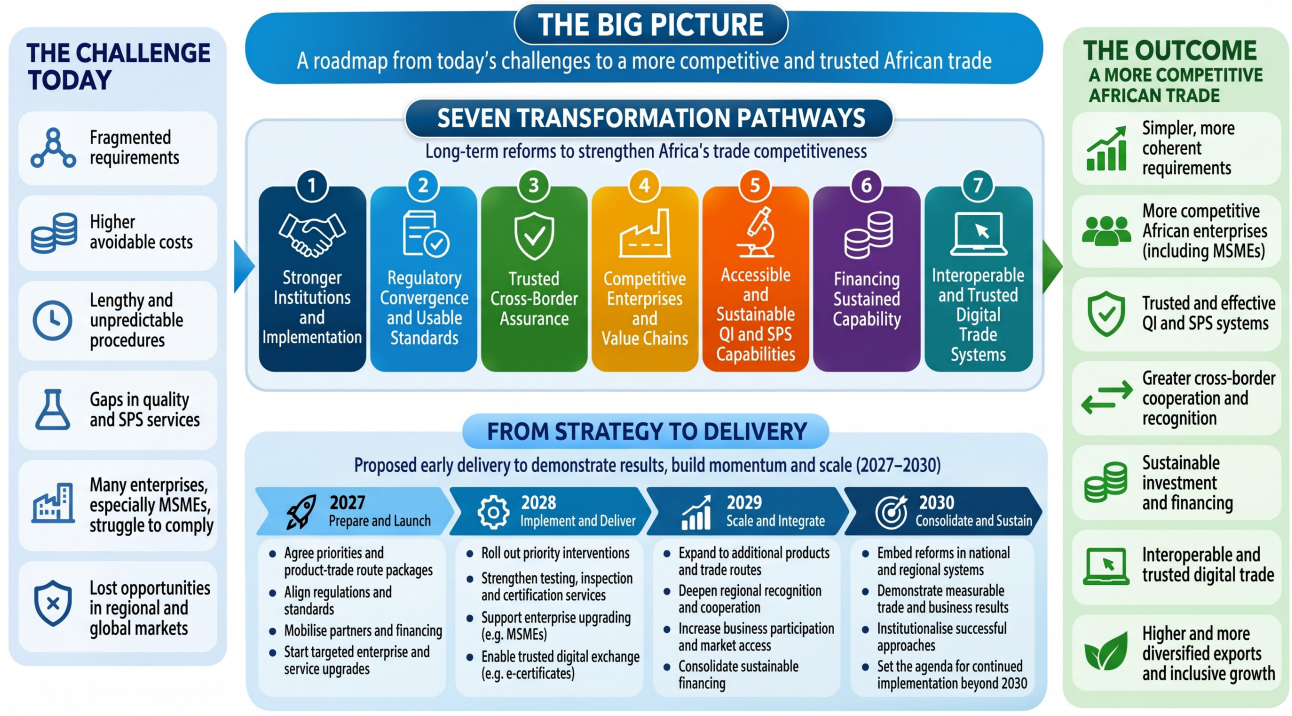
Implementation can build on these arrangements. Countries and regions start from different positions: some need to put existing commitments into operation, others to extend successful cooperation, and others to strengthen the services and official controls required to participate. Businesses need to see the resulting change in the requirements they face, the costs they pay and the markets they can serve.

Seven interconnected transformation pathways provide the strategic direction towards 2030 and beyond. They address institutional coordination, regulatory convergence, trusted conformity assessment, enterprise competitiveness, accessible quality and SPS services, sustainable financing and digital interoperability. These reforms are mutually reinforcing and require sustained leadership, investment and cooperation across governments, regional institutions and the private sector.

The proposed 2027–2030 actions are an initial delivery agenda within this longer-term framework. They identify opportunities to demonstrate progress through selected products and trade routes, test practical approaches and build an evidence base for expansion.

They are illustrative proposals, not approved programmes, funding commitments or fixed continental targets. The proposed Africa Trusted Trade Compact would connect the seven pathways through an initial portfolio of six product–trade route delivery packages, subject to agreement on demand, institutional responsibilities, financing and measurable outcomes. Its purpose is to accelerate implementation of the wider reform agenda.

Figure 5.1 - Proposed 2027–2030 Delivery Roadmap





Make Existing Trade Commitments Work for Business

Strategic transformation requires stronger coordination and improved implementation. Africa's trade integration requires institutions capable of translating continental and regional commitments into consistent national practice. The long-term priority is to strengthen coordination, regulatory transparency, accountability and mechanisms for resolving implementation problems across borders. Reform should progressively reduce the gap between commitments agreed and conditions experienced by businesses, while preserving the mandates of national competent authorities

For an exporter, the practical benefits of an agreement become clearer through individual transactions. Differences in how certificates are accepted or procedures applied can create uncertainty and additional costs. Authorities and businesses can jointly identify where existing commitments offer a basis for improvement, with clear responsibilities for implementation.

Existing coordination mechanisms can focus delivery on practical transaction needs. Continental and regional institutions can coordinate priorities and support convergence, while national authorities retain their statutory responsibilities for regulation, official controls and acceptance decisions. Each priority intervention should identify an accountable lead, the decision required, financing, business participants and measurable outcomes. Political leadership can help resolve cross-institutional constraints, while technical decisions remain with legally competent authorities.

Governments, regional economic communities and business organisations can jointly select products and trade routes where demand is credible and avoidable regulatory costs are material. Candidate priorities include grain and processed-food trade, construction materials and horticulture. Selection would identify the specific problem: conflicting requirements, repeated testing, an unavailable service or uncertain approval. These are candidate areas for agreement, not a predetermined continental list.

Each delivery package would cover a selected product and trade route, its priority constraint, responsible institutions and agreed actions. Its delivery plan would identify the relevant agreement, financing, baseline and deadline. Implementation should strengthen SPS/TBT transparency, notification, enquiry points and resolution of specific trade concerns and non-tariff barriers. Existing mechanisms would review progress quarterly, with businesses verifying results.

The EAC framework illustrates the value of connecting regional cooperation with national implementation. Its relevance to other regions lies in identifying which decisions and services make commitments usable by firms, while adapting implementation to local circumstances.[74]

Proposed Target for Discussion

Within six months of ATDF, agree six product–trade route delivery packages across three regions. Resolve at least one priority regulatory or procedural constraint in each package by end-2028. National authorities would lead, supported by regional coordination and business validation.



Align Standards for Priority Traded Goods

Strategic transformation requires reducing fragmentation through sustained cooperation to develop, harmonise, adopt and implement relevant standards, while addressing unnecessary differences in mandatory technical requirements. African institutions must also strengthen participation in international standardisation and ensure that businesses can access and apply agreed requirements. The long-term objective is greater regulatory coherence and more efficient production across regional markets, without weakening legitimate protection.

Different specifications for the same product can raise the cost of trade. Manufacturers may need to adapt production, packaging or testing for individual markets. Pathway 2 will address these differences within the six product–trade route delivery packages agreed under Pathway 1. Businesses, standards bodies and regulators should identify the standards relevant to each package and where alignment could reduce avoidable costs, taking account of market requirements, legitimate risks and implementation feasibility.

The first priority is to align the relevant standards within these six delivery packages. Drawing on relevant international and African standards, regional bodies would coordinate harmonisation and national standards bodies would lead adoption. Regulators would address conflicting mandatory requirements through appropriate legal processes, consistent with WTO TBT disciplines. Adopting a standard does not itself amend a technical regulation. SPS measures would remain subject to their distinct science-based and risk-assessment disciplines.

[74] EAC Standardisation, Quality Assurance, Metrology and Testing Act 2006. Online reference

The second priority is to help businesses apply the standards relevant to their product and trade route. Practical guidance, access to standards and technical support can help firms adapt production and demonstrate conformity. Progress should be measured through businesses and transactions benefiting, alongside standards harmonised and adopted. These activities would form part of each delivery package's implementation plan. TMA's published account of EAC support illustrates the potential benefits. Priority goods included maize products, edible oils and iron and steel products. TMA reports average testing costs per sample falling from US$500 in 2010 to US$205 in 2014 alongside harmonisation and stronger assessment services. This is a historical programme-reported result, not a forecast for the six delivery packages. [75]

Proposed Target for Discussion

By end-2027, identify the standards requiring alignment within the six product–trade route delivery packages agreed under Pathway 1, and agree which participating countries need to adopt each standard. By end-2028, complete harmonisation of the identified standards and at least 80% of the agreed national adoptions, and provide practical business guidance for each of the six delivery packages. Progress would be tracked against the agreed list of standards and adopting countries, with results reported for each package. Standards bodies and relevant regulators would lead this work with industry participation.

[75] TMA, Contribution of Standards Harmonisation and Certification towards Reduction in the Conformity Assessment Clearance Time and Testing Cost: The Case of the EAC, 20 May 2019. Programme-reported comparisons for 2010 and 2014. https://trademarkafrica.com/contribution-of-standards-harmonisation-and-certification-towards-reduction-in-the-conformity-assesment-clearance-time-and-testing-cost-the-case-of-the-eac/



Make Mutual Recognition Work Across Borders

For strategic transformation Africa needs stronger institutional arrangements through which credible conformity assessment results can be recognised and accepted. This requires technically competent assessment bodies, confidence between regulators, clear legal procedures and effective oversight. For SPS measures, complementary cooperation on equivalence, regionalisation and risk-based controls must follow the applicable scientific and regulatory disciplines. The objective is to reduce unnecessary duplication while maintaining confidence in protection.

An exporter can meet a market's requirements yet still pay for repeated testing because the first result is not accepted. Mutual recognition agreements and arrangements can reduce this duplication by establishing when specified assessments from one participating country can be accepted in another. The business benefit is lower cost and greater certainty about the evidence required.

The priority is to make existing arrangements operational and extend them where demand warrants. Authorities would agree the products, assessment bodies and results covered, communicate procedures to border officials and traders, and provide a route for resolving non-acceptance. Accreditation supports confidence in technical competence within its scope; the relevant legal and regulatory arrangements establish acceptance.

COMESA reports that Zambia and Malawi signed a conformity assessment mutual recognition agreement in August 2025. This offers a concrete starting point for implementation and learning. Evidence of use by traders, accepted results and costs avoided would establish its commercial contribution. This evidence would complement the important institutional milestone represented by signature.[76]

Food corridors require coordinated, risk-based SPS controls that enable safe and predictable trade. Authorities should align inspection, sampling, testing and certification procedures where appropriate, while advancing SPS equivalence and regionalisation under WTO SPS disciplines and AfCFTA Annex 7. These mechanisms remain distinct from mutual recognition of conformity assessment results under TBT frameworks.[77]

An arrangement should count as operational only when its procedures are in use and specified results have been accepted in actual transactions. Authorities and businesses should monitor accepted results, costs saved and reasons for refusal, alongside maintained protection. For measurement, unnecessary repeat assessment should be defined jointly against the agreed acceptance conditions and applicable risk controls.

Proposed Target for Discussion

By end-2028, operationalise recognition arrangements in the six product–trade route delivery packages, and separately establish two SPS cooperation arrangements for food trade routes. Target a 50% reduction in the baseline rate of unnecessary repeat assessment for covered transactions. Importing and exporting competent authorities would jointly lead delivery.



Help Firms Win and Retain Customers

Strategic transformation with sustainable export growth depends on African enterprises that can consistently meet market requirements, improve productivity and retain customers. The long-term priority is to embed quality management, technical skills, innovation, supplier development and market intelligence within enterprise and industrial development strategies.

[76] COMESA. e-COMESA newsletter, issue 759, 15 August 2025. Report on the Zambia–Malawi conformity assessment agreement signed on 11 August 2025. Online reference

[77] WTO, Agreement on the Application of Sanitary and Phytosanitary Measures, Articles 4 (equivalence) and 6 (adaptation to regional conditions); AfCFTA Protocol on Trade in Goods, Annex 7. Online reference

MSMEs need practical pathways into regional and global value chains, including through aggregation, shared services and relationships with larger buyers.

Clearer rules and accepted certificates create opportunities, but firms also need the capability to fulfil orders. Public agencies, business organisations and development partners can connect technical support with identified buyers, realistic delivery requirements and suitable finance. The starting point is a commercially credible market opportunity.

Support would combine a diagnosis of buyer and regulatory requirements with a costed improvement plan based on the product, customer, price, specifications and delivery requirements. Depending on the business, this could cover production consistency, pest management, packaging, traceability, management skills or working capital. Shared constraints may also require improvements in suppliers, aggregation and logistics. Certification would be supported where it is required or commercially useful. Smaller firms, including women- and youth-led businesses, could participate through supplier relationships, producer groups and shared services.

Ghana's return to European vegetable markets illustrates why enterprise and public-system improvements need to work together. In January 2018, CABI reported that improved phytosanitary systems had enabled the resumption of vegetable exports valued at about $15 million annually after restrictions imposed in 2015. The case demonstrates the commercial importance of restoring credible official assurance alongside supply-chain capability; the reported value is not an estimate of additional sales attributable to one intervention.[78]

Delivery partners would follow firms beyond training or certification, tracking orders fulfilled, repeat purchases, preventable rejections and supplier retention. At enrolment, each firm's plan would identify the product, target buyer or market and existing sales. Repeat-sales results would require a subsequent fulfilled order following the initial order supported by the programme. New-market entry and expansion of existing business would be reported separately, with routine pre-existing sales excluded. Results would be disaggregated by firm size and ownership where feasible.

Proposed Target for Discussion

Provide buyer-linked upgrading support to 300 firms by end-2028, including smaller suppliers. Target 150 achieving repeat sales into their identified markets within 24 months of enrolment. Firms enrolling in late 2028 would be assessed by end-2030.

[78] CABI. Vegetable exports from Ghana resume after work to improve phytosanitary system, 15 January 2018. Online reference



Make Testing and SPS Services Accessible and Reliable

Strategic transformation requires Africa to strengthen its technical and regulatory capabilities as interconnected systems serving priority sectors and value chains. Long-term reform requires competent institutions, sustainable operating finance, effective SPS surveillance and official controls, and reliable access to testing, measurement, inspection and certification. National investment should be complemented by regional and shared-service arrangements where these offer better access, efficiency and sustainability.

Businesses need affordable, competent services that deliver results in time for production and shipment. Reliable supplies of consumables and clarity about report acceptance help laboratories meet firms' practical needs. The priority is reliable access to the specific testing, measurement, inspection and official-control capabilities required by selected products and markets.

Before investing, authorities and service providers would compare the available options: upgrading an existing laboratory, extending its methods, using a regional provider, improving sample transport or creating new capacity where justified.

The balance between national facilities and regional services will depend on demand, technical scope, turnaround requirements and sustainable operating finance. Options should be assessed against expected use, technical scope, full life-cycle costs and sustainability, using recognised diagnostics where appropriate.

The Southern African Development Community Accreditation Service (SADCAS) provides an established example of a multi-economy approach to accreditation. It demonstrates that countries can share specialist institutional capability. Exporters still need access to competent testing providers and acceptance of the resulting evidence in the destination market. [79]

Investment plans should cover equipment, personnel, maintenance, calibration, consumables and continuing competence, alongside sustainable financing for SPS surveillance, inspection and official certification. Consistent with WTO SPS and Trade Facilitation disciplines and relevant AfCFTA annexes, authorities should strengthen risk-based controls, coordinate border procedures and publish service standards while maintaining legitimate protection.

Proposed Target for Discussion

By end-2030, address ten priority service gaps, each with funded operating costs and published service standards. For services with a comparable baseline, target a 30% reduction in median turnaround time. Where no comparable service previously existed, agree an access and turnaround standard instead. Providers and responsible public authorities would report use, technical performance and access for smaller businesses.

[79] SADCAS. Corporate brochure, description of the multi-economy accreditation body. Online reference



Finance Business Upgrading and Essential Services

Structural transformation across Quality infrastructure, SPS systems and enterprise upgrading requires financing models that distinguish commercial investments from essential public functions. The long-term objective is to mobilise appropriate private finance for productive upgrading while securing predictable public resources for regulatory oversight, surveillance and other public-good services. Investment decisions should reflect demand, institutional responsibilities, life-cycle costs and measurable economic benefits.

A firm may have a buyer but lack the funds to upgrade equipment or finance production until payment arrives. A laboratory with suitable equipment may need more dependable maintenance funding. These require different financing solutions. The compact would connect the needs identified under the other pathways with appropriate public budgets, commercial finance and development support.

Enterprise equipment may suit term lending or leasing; export orders may need working capital, receivables finance or payment-risk instruments. Shared commercial services need realistic demand and revenue estimates. Public SPS surveillance and regulatory functions require sustained budget support. Grants and guarantees can address demonstrated public benefits or financing gaps, with clear justification for the support provided.

For illustration, a food processor with a confirmed buyer might need a loan to improve packaging and working capital to fulfil the order. The official surveillance programme supporting market access would need a separate public funding arrangement. Addressing these complementary needs separately can help ensure that enterprise finance and public-service funding each serve their intended purpose.

Each delivery package would therefore include a costed financing plan covering investment and recurrent costs, intended users, repayment or budget sources and key risks. The plan should also explain why public or concessional support is needed and what it would enable beyond available commercial finance. Financiers and delivery partners would track funding through to functioning services and fulfilled orders. A continent-wide trade-finance estimate would not be used as a proxy for the standards and SPS financing requirement.

Proposed Target for Discussion

Within 12 months of ATDF, prepare a financing package for each of the six delivery packages. By end-2030, secure funding agreements covering at least 70% of independently appraised first-phase costs. Governments, financiers and delivery partners would report commitments, disbursements and expenditure separately.



Exchange and Accept Trade Documents Electronically

Structural transformation requires integrated connected digital systems that allow authorised institutions to exchange, authenticate and use reliable trade information. This requires compatible data standards, legal acceptance, cybersecurity, institutional coordination and accessible services for businesses. The long-term objective is to reduce unnecessary paperwork and repeated submissions while maintaining effective regulatory decisions and safeguards.

Paper certificates and repeated data submission add delay when documents cannot be checked quickly, or information has to be entered again. Electronic exchange can help exporters when the receiving authority can authenticate the record, use its contents and make the required decision. The priority is an accepted transaction, with fewer unnecessary steps.

Issuing and receiving authorities should prioritise interoperable electronic certification, single windows, pre-arrival processing and coordinated border decisions, consistent with the WTO Trade Facilitation Agreement and AfCFTA Annex 4. Implementation should establish common data requirements, secure verification, legal acceptance, cybersecurity, accountability and business support, with clear procedures for corrections and system outages.[80]

The IPPC's ePhyto Solution offers an established route for exchanging electronic phytosanitary certificates. Its central Hub connects national plant protection organisations, while a generic national system enables countries without their own electronic certification system to participate. This creates an opportunity to expand use through existing infrastructure. Electronic exchange still depends on credible inspection and certification, and agreed receiving-country procedures.[81]

The scorecard would distinguish systems connected from certificates actually exchanged and accepted. It would measure verification time and repeated submissions, alongside system reliability. A digital signature can help verify the origin and integrity of a record; it does not by itself establish the validity of the underlying assessment or require an authority to accept it. Eligible certificates should be defined by document type, participating authorities and trade route. Acceptance of an electronic document does not by itself constitute approval of the consignment. A route would count as operational once participating authorities have exchanged and accepted eligible electronic certificates in actual transactions.

[80] WTO, Trade Facilitation Agreement, Articles 7 (release and clearance), 8 (border agency cooperation) and 10 (formalities, including single windows); AfCFTA Protocol on Trade in Goods, Annex 4. Online reference

[81] IPPC ePhyto Solution, description of the Hub and Generic ePhyto National System. Online reference

Proposed Target for Discussion

By end-2030, establish operational electronic exchange on six participating bilateral trade routes. Target 80% of eligible certificates exchanged and accepted electronically and a 50% reduction in median document-verification time. Issuing and receiving authorities would jointly own delivery.

From the Forum to Delivery

The seven transformation pathways set the long-term direction; the proposed 2027–30 delivery compact provides an initial means of putting them into practice. Its product-trade route packages would bring together relevant regulatory reforms, enterprise support, technical services, financing and digital solutions. Lessons from these initial interventions would inform wider institutional reforms, investment decisions and expansion towards 2030 and beyond.

Africa can build on continental commitments through a shared focus on practical implementation. Trade agreements, harmonised standards and technical institutions create opportunities whose economic benefits can grow as businesses are supported to use them. The shared priority is to resolve identifiable product-market constraints through coordinated regulatory reform, enterprise upgrading, technical capability, financing and trade facilitation.

ATDF participants are invited to endorse the compact's direction and identify the first products, trade routes and institutions ready to act. National authorities would lead regulatory implementation; regional economic communities would support coordination; businesses would identify constraints and verify improvements; technical institutions and financiers would help deliver the required capabilities. TMA and UNIDO could support convening, technical assistance and consolidated reporting, subject to agreed roles and resources.

The seven pathways would support the same six delivery packages, with each package combining the interventions needed to address its particular constraints. A selected food trade route, for example, might combine SPS cooperation, better testing, producer upgrading and electronic certification. Product groups, recognition arrangements, service investments and digital routes would be selected within this shared portfolio. Scaling would follow evidence of use, measurable business benefits and sustainable operating finance.

The call to action is to make existing commitments deliver visible change: requirements businesses can understand, services they can afford and rely on, evidence accepted across borders, and customers they can retain.

Proposed Compact Scorecard

Participants could endorse the direction at ATDF, with delivery packages developed within six months and financing plans within 12. Indicative concrete progress could align with the results below.

	Pathway	Proposed Target	Proposed Lead
1	**Implementation**	Six product–trade route delivery packages across at least three regions within six months; at least one priority constraint resolved in each by end-2028.	National authorities; regional coordination and business validation.
2	**Standards**	By end-2027, agree the standards requiring alignment and national adoption within the six delivery packages. By end-2028, harmonise those standards, complete at least 80% of agreed national adoptions, and provide business guidance for every package.	Standards bodies and regulators, with industry.
3	**Recognition and SPS cooperation**	One operational recognition arrangement within each of the six packages, and two food-route SPS cooperation arrangements by end-2030; 50% reduction in unnecessary repeat-assessment rate.	Importing and exporting competent authorities.
4	**Enterprise capability**	300 firms supported by end-2030; 150 achieve programme-linked repeat sales within 24 months of enrolment, with these firms enrolled by end-2028 and assessed by end-2030. Existing sales recorded at entry.	Delivery partners and business organisations, with buyers.
5	**Technical services**	Ten priority service gaps addressed by end-2030, with funded operations and service standards; 30% lower median turnaround where comparable, or an agreed access and turnaround standard for new services.	Service providers and public authorities.
6	**Finance**	A financing plan for each of the six packages within 12 months; funding agreements covering 70% of appraised first-phase costs by end-2030.	Governments, financiers and delivery partners.
7	**Digital exchanges**	Six bilateral routes operational by end-2028; 80% of eligible certificates exchanged and accepted electronically; verification time reduced by 50%.	Issuing and receiving authorities jointly.

Turning Ambition into Results

Africa has the foundations to make quality a stronger driver of trade, industrial development and economic opportunity. The AfCFTA provides a framework for integration; African institutions provide the basis for cooperation; and businesses across the continent demonstrate the potential to compete in increasingly demanding markets.

Realising that potential requires sustained reform. Standards must become easier to understand and apply. Technical services must be accessible, competent and trusted. SPS systems must protect health while supporting predictable trade. Enterprises must be able to invest in productivity, meet customer requirements and build lasting commercial relationships.

The seven transformation pathways provide a shared direction towards 2030 and beyond. Their success will depend on stronger institutions, coordinated investment and continued cooperation among governments, regional organisations, businesses and development partners. The proposed 2027–30 delivery actions offer an opportunity to begin translating this ambition into measurable results. By concentrating on priority value chains and trade routes, partners can demonstrate practical improvements, learn from implementation and build the case for wider reform.

The ultimate measure of success is not the number of standards published, laboratories upgraded or certificates issued. It is whether African businesses can trade more competitively, retain markets and create lasting economic opportunities – supported by trusted systems that protect people, products and the environment.



List of Acronyms

ACAP	ARSO Conformity Assessment Programme
ACTReF	African Continental Technical Regulatory Framework
AfCFTA	African Continental Free Trade Area
AFRAC	African Accreditation Cooperation
AFRIMETS	Intra-Africa Metrology System
AFSEC	African Electrotechnical Standardisation Commission
ALOP	Appropriate Level of Protection
ANSI	American National Standards Institute
AQM	African Quality Mark
AQP	Africa Quality Policy
AQPC	Africa Quality Policy Council
ARSO	African Organisation for Standardisation
ASEAN	Association of Southeast Asian Nations
ATCMA	Africa Trade Competitiveness and Market Access Programme
ATDF	Africa Trade Development Forum
BIPM	International Bureau of Weights and Measures
BRCGS	Brand Reputation through Compliance Global Standards
BSI	British Standards Institution
CAB	Conformity Assessment Body
CABI	CAB International, commonly known as CABI
CAC	Codex Alimentarius Commission
CBAM	Carbon Border Adjustment Mechanism
CIPM	International Committee for Weights and Measures
CMC	Calibration and Measurement Capability
Codex	Codex Alimentarius: *international food standards, guidelines and codes of practice*
COMESA	Common Market for Eastern and Southern Africa
CoP	Community of Practice
DFI	Development Finance Institution
DPP	Digital Product Passport
EAC	East African Community
ECOWAS	Economic Community of West African States
ePhyto	Electronic Phytosanitary Certificate; *also used for the IPPC ePhyto Solution*
ESG	Environmental, Social and Governance
EU	European Union
EUDR	European Union Deforestation Regulation

List of Acronyms

FAO	Food and Agriculture Organization of the United Nations
FCDO	United Kingdom Foreign, Commonwealth and Development Office
FCM	False Codling Moth
GFSI	Global Food Safety Initiative
Global ACI	Global Accreditation Cooperation Incorporated
GLOBALG.A.P.	Assurance Scheme for Good Agricultural Practices
GVC	Global Value Chain
HACCP	Hazard Analysis and Critical Control Point
IAF	International Accreditation Forum
IEC	International Electrotechnical Commission
IFS	International Featured Standards
IGAD	Intergovernmental Authority on Development
ILAC	International Laboratory Accreditation Cooperation
INetQI	International Network on Quality Infrastructure
IPPC	International Plant Protection Convention
ISO	International Organization for Standardization
ISPM	International Standard for Phytosanitary Measures
ITC	International Trade Centre
LPI	Logistics Performance Index
MLA	Multilateral Recognition Arrangement
MRA	Mutual Recognition Agreement or Arrangement
MRL	Maximum Residue Limit
MSME	Micro, Small and Medium-sized Enterprise
NamLITS	Namibia Livestock Identification and Traceability System
NMI	National Metrology Institute
NPPO	National Plant Protection Organisation
NTB	Non-Tariff Barrier
NTM	Non-Tariff Measure
PAFTRAC	Pan-African Private Sector Trade and Investment Committee
PAQI	Pan-African Quality Infrastructure

List of Acronyms

PBCA	Performance-Based Conformity Assessment
PRA	Pest Risk Analysis
PTB	Physikalisch-Technische Bundesanstalt, Germany's National Metrology Institute
QI	Quality Infrastructure
QI4SD	Quality Infrastructure for Sustainable Development
QIS	Quality Infrastructure System
RASFF	Rapid Alert System for Food and Feed
REC	Regional Economic Community
RIA	Regulatory Impact Assessment
SADC	Southern African Development Community
SADCAS	SADC Accreditation Service
SDG	Sustainable Development Goal
SI	International System of Units
SPS	Sanitary and Phytosanitary
SQI	Standards and Quality Infrastructure
STDF	Standards and Trade Development Facility
TBT	Technical Barriers to Trade
TFA	WTO Trade Facilitation Agreement
TLIP	Trade Logistics Information Pipeline
TMA	TradeMark Africa
TTE	Trusted Trade Ecosystem
UNCTAD	UN Trade and Development (United Nations Conference on Trade and Development)
UNECA	United Nations Economic Commission for Africa
UNIDO	United Nations Industrial Development Organization
VIBE	Value-added Initiative to Boost Employment for Women-led Businesses
VIM	International Vocabulary of Metrology
VSS	Voluntary Sustainability Standard
WOAH	World Organisation for Animal Health

Glossary and Technical References

Accreditation. Independent confirmation that a conformity assessment body is competent and impartial for specified activities. Accreditation does not automatically guarantee acceptance of its results in every market.

AfCFTA (African Continental Free Trade Area). The continental framework for expanding trade and economic integration among participating African countries.

Competent authority. A public institution legally responsible for specific regulatory functions, such as food safety, veterinary controls or plant-health certification.

Compliance. Fulfilment of mandatory legal or regulatory requirements.

Conformity. Fulfilment of specified requirements, whether mandatory, voluntary or contractual.

Conformity assessment. Activities used to demonstrate that specified requirements have been met, including testing, inspection, certification, validation and verification.

Equivalence (SPS). Acceptance of different SPS measures when the exporting country objectively demonstrates that they achieve the importing country's required level of protection.

Harmonisation. Developing or aligning requirements around a common basis to reduce unnecessary differences between markets. Harmonisation does not automatically ensure national adoption or acceptance of assessment results.

Market access. The ability to enter a market by meeting its applicable legal and regulatory conditions. Market access does not guarantee commercial success.

Market success. The ability of a business to win and retain customers, fulfil orders and compete profitably and sustainably.

Mutual Recognition Agreement or Arrangement (MRA). An agreement or arrangement under which parties recognise specified assessment results or capabilities within agreed scopes and conditions. Recognition does not necessarily mean automatic regulatory acceptance.

Non-Tariff Barrier (NTB). A non-tariff restriction or implementation practice that obstructs trade and is discriminatory or unnecessarily restrictive.

Non-Tariff Measure (NTM). A policy measure other than an ordinary customs tariff that may affect trade. NTMs include legitimate health, safety and environmental measures and are not necessarily trade barriers.

Quality. The extent to which a product, service, process or system meets specified requirements and expectations. Quality is broader than certification.

Quality Infrastructure (QI). The institutions, policies, systems and services supporting standardisation, metrology, accreditation and conformity assessment.

Regionalisation (SPS). Adapting SPS requirements to the pest or disease conditions of specific geographical areas, rather than treating an entire country as having identical risks.

Regulatory Convergence. Reducing unnecessary differences or incompatibilities between regulatory systems through alignment, cooperation, equivalence or other appropriate approaches. It does not require identical national rules.

Sanitary and Phytosanitary (SPS) Measures. Measures protecting human, animal or plant life or health from specified food-safety, pest and disease risks.

SPS System. The competent authorities, laws, surveillance, inspection, diagnostic, certification and response capabilities used to manage relevant food-safety, animal-health and plant-health risks. QI supports these functions but does not replace regulatory authority.

Standard. A document setting agreed specifications, requirements or guidance for repeated use. Standards are generally voluntary, although regulations or contracts may make their application obligatory.

Technical regulation. A mandatory requirement governing product characteristics or related production methods, including applicable labelling or administrative provisions.

Traceability. The ability to follow a product, lot or relevant inputs through specified stages of production, processing and distribution.

Trusted Trade Ecosystem. The report's term for the connected enterprise capabilities, QI and SPS systems, regulatory procedures, logistics, digital systems and cooperation arrangements that support dependable trade.

Value chain. The interconnected activities and businesses involved in producing, processing, transporting and marketing a product or service.



Principal Technical References

The following references provide the principal definitions, legal principles and institutional frameworks used in this report. They complement the chapter-specific evidence and citations.

1. **Conformity Assessment and Accreditation**
   https://www.iso.org/standard/73029.htmlAccreditation.
   International Organization for Standardization (ISO) and International Electrotechnical Commission (IEC). ISO/IEC 17000: Conformity Assessment — Vocabulary and General Principles; and ISO/IEC 17011: Conformity Assessment — Requirements for Accreditation Bodies Accrediting Conformity Assessment Bodies.
   https://www.iso.org/standard/73029.html

2. **Sanitary and Phytosanitary Measures**
   World Trade Organization (WTO). Agreement on the Application of Sanitary and Phytosanitary Measures, particularly Articles 4 (Equivalence), 6 (Adaptation to Regional Conditions) and Annex A (Definitions).
   https://www.wto.org/english/tratop_e/sps_e/spsagr_e.htm.
   https://www.wto.org/english/tratop_e/sps_e/spsagr_e.htm

3. **Metrology and Measurement**
   Joint Committee for Guides in Metrology (JCGM) and International Bureau of Weights and Measures (BIPM). International Vocabulary of Metrology (VIM): Basic and General Concepts and Associated Terms.
   Principal reference for calibration, measurement uncertainty and metrological traceability.
   https://jcgm.bipm.org/vim/en/ https://jcgm.bipm.org/vim/en/

4. **Non-Tariff Measures**
   United Nations Conference on Trade and Development (UNCTAD).
   Introduction to Non-Tariff Measures and the International Classification of Non-Tariff Measures.
   Principal reference for distinguishing non-tariff measures from unnecessary trade barriers.
   https://unctad.org/topic/trade-analysis/non-tariff-measures/NTMs-Introduction

5. **International Plant Health Standards**
   International Plant Protection Convention (IPPC). International Standards for Phytosanitary Measures, particularly ISPM 5 (Glossary of Phytosanitary Terms) and ISPM 14 (The Use of Integrated Measures in a Systems Approach for Pest Risk Management).
   See also IPPC guidance on electronic phytosanitary certification (ePhyto).

https://www.ippc.int/en/centre-of-excellence/framework/list/

6. **Quality Infrastructure**
   International Network on Quality Infrastructure (INetQI). Definition of Quality Infrastructure. Principal reference for the scope of quality infrastructure, encompassing standardisation, metrology, accreditation and conformity assessment.
   https://www.inetqi.net/documentation/quality-infrastructure-definition/

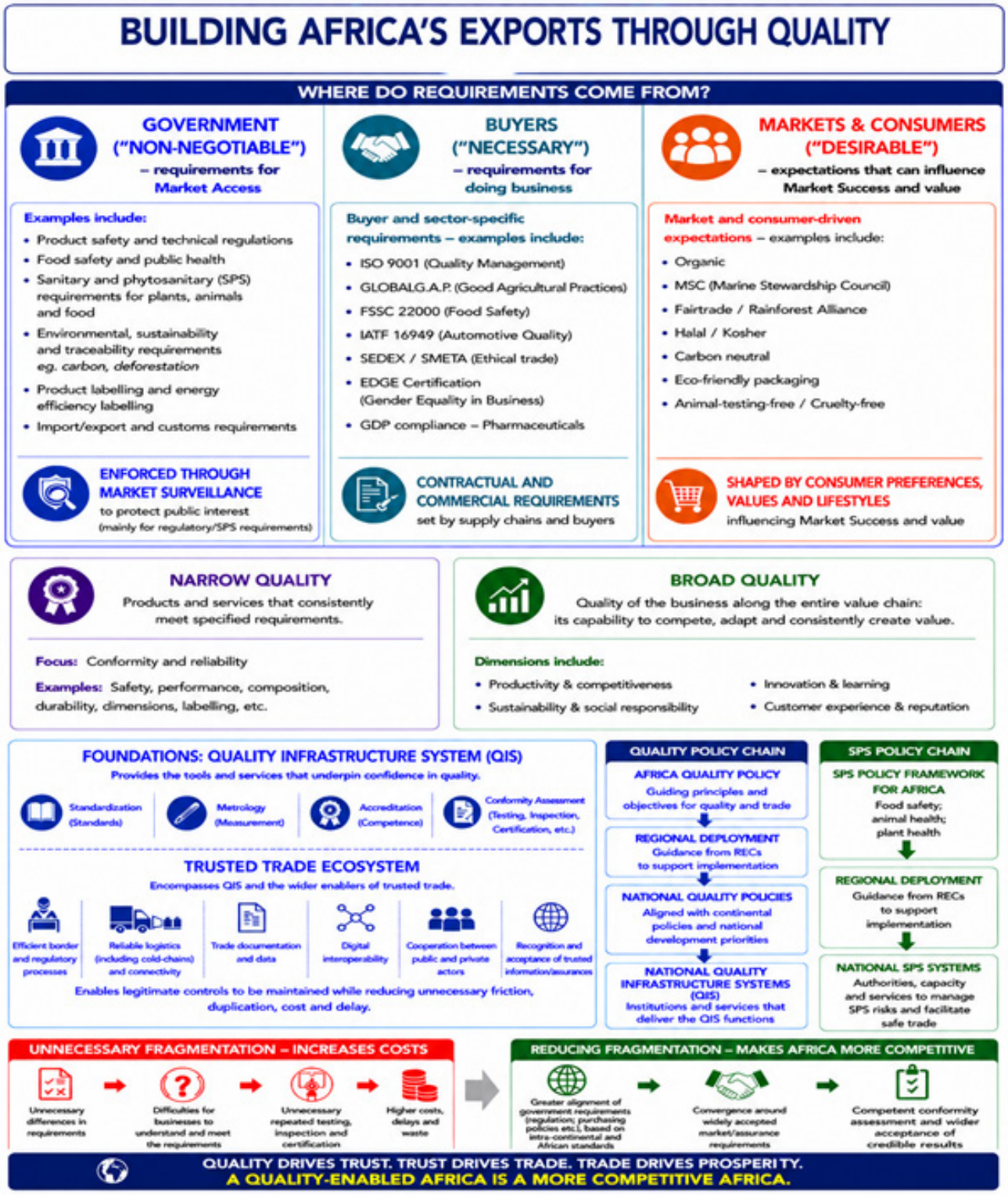
7. **Technical Barriers to Trade**
   World Trade Organization (WTO). Agreement on Technical Barriers to Trade, particularly Annex 1 (Terms and Definitions) and Article 6 (Recognition of Conformity Assessment by Central Government Bodies).
   https://www.wto.org/english/tratop_e/tbt_e/tbtagr_e.htm

8. **International Accreditation Recognition**
   Global Accreditation Cooperation Incorporated (Global ACI). Multilateral Recognition Arrangement: Structure, Scopes and Obligations.
   https://global-aci.org/en/about-the-global-aci-mra/
   Reference for international cooperation and recognition of accredited conformity assessment activities within defined scopes.
   https://global-aci.org/en/about-the-global-aci-mra/

9. **African Quality and Technical Regulatory Frameworks**
   Pan-African Quality Infrastructure (PAQI). Africa Quality Policy and African Continental Technical Regulatory Framework (ACTReF).
   https://www.paqi.org/?page_id=44
   Reference frameworks supporting continental quality infrastructure development, regulatory cooperation and implementation of the AfCFTA.
   https://www.paqi.org/?page_id=44

10. **Quality Infrastructure for Sustainable Development**
    https://hub.unido.org/qi4sd/
    United Nations Industrial Development Organization (UNIDO). Quality Infrastructure for Sustainable Development (QI4SD) Index.
    Reference for assessing national quality infrastructure capabilities and identifying institutional development priorities.
    https://hub.unido.org/qi4sd.

Figure 5.2 "The big picture - UNLOCKING AFRICA'S TRADE THROUGH QUALITY"







AFRICA TRADE DEVELOPMENT FORUM 2026

www.trademarkafrica.com

@trademark_africa

TradeMark Africa

TradeMark Africa

@TradeMarkAfrica

@TradeMarkAfrica