

# COMESA: UNTAPPED POTENTIAL IN SUGARS AND SUGAR CONFECTIONERY PRODUCTS

## 1.0 Sugars and Sugar confectionery products

Between 2016 and 2022, imports of sugars and sugar confectionery products into COMESA witnessed a significant increase reaching a value of \$3.7 billion in 2022 (figure 1). This sector comprises Cane or beet sugar and chemically pure sucrose in solid form, Sugar confectionery not containing cocoa, Other sugars, including chemically pure lactose, maltose, glucose, and fructose, in solid form and Molasses resulting from sugar extraction or refining. As shown in the table below, 'cane or beet sugar and chemically pure sucrose' dominate COMESA's imports within this category, accounting for a total of \$3.4 billion in 2022.

Table showing COMESA's imports of Sugars and Sugar confectionery products (2014-2022)

Product label	Imported value in US Dollar thousand									
	2014	2015	2016	2017	2018	2019	2020	2021	2022	
1. Cane / beet sugar and chemically pure sucrose ( HS 1701)	1,868,688	2,155,806	2,674,419	3,087,289	2,745,092	2,182,464	2,135,159	3,014,031	3,440,119	
2. Sugar confectionery not containing cocoa (HS '1704)	124,843	163,456	180,836	139,404	161,751	184,663	160,838	200,962	211,925	
3. Other sugars, incl. chemically pure lactose, maltose, glucose and fructose ( HS 1702)	98,203	93,971	79,860	89,314	92,265	80,342	88,617	104,049	125,911	
4. Molasses resulting from the extraction or refining of sugar (HS 1703)	9,344	9,252	11,442	17,655	15,601	14,917	15,871	13,975	15,391	

Source: International Trade Centre data on UNCOMTRADE statistics.

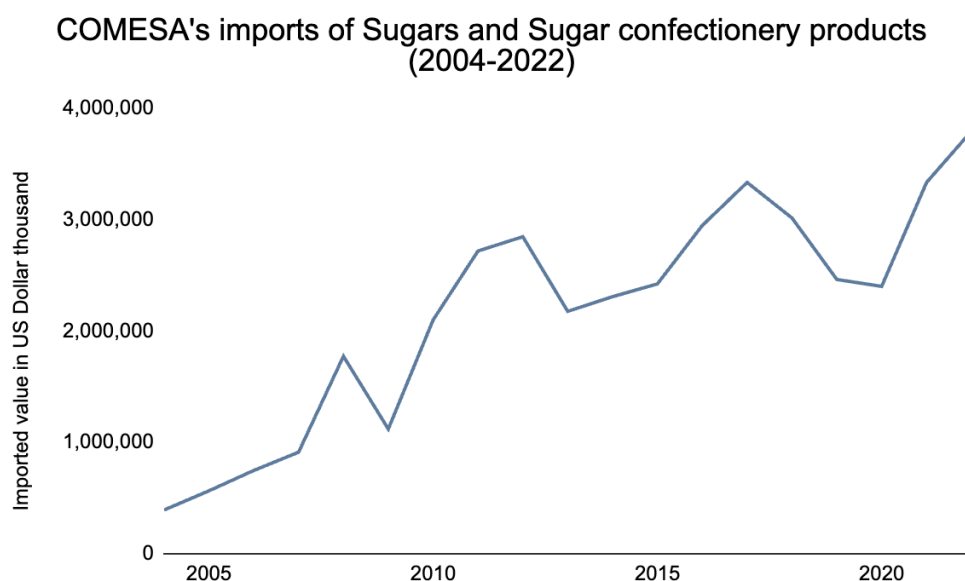


Figure 1

## 1.1 Sugar confectionery not containing cocoa (HS '1704)

This article focuses on opportunities in the 'Non-cocoa, Sugar confectionery' sector (HS 1704). The graph (Figure 2) reveals a sharp rise in demand for these products, with imports reaching a peak of \$211.9 million in 2022. This represents a significant increase from \$124.8 million in 2014, suggesting a growing market for non-cocoa confectionery products.

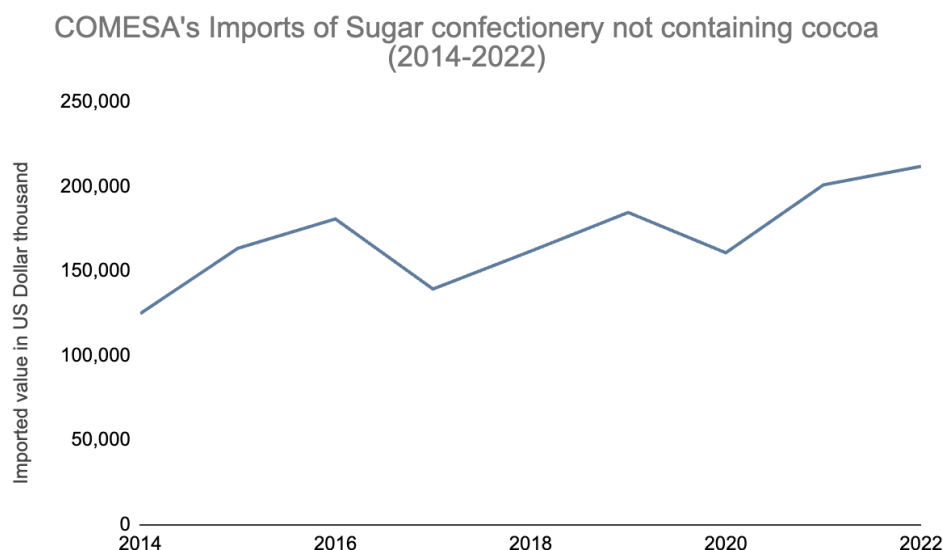


Figure 2

The table below reveals that in 2022, COMESA's import demand for Non-cocoa, sugar confectionery products was concentrated in five key markets, accounting for a combined 65.7% share. These markets are: Sudan (\$40.1 million), Libya (\$37.1 million), Uganda (\$25.4 million), Somalia (\$23.8 million) and Egypt (\$12.7 million).

Table showing COMESA's import demand for Non-cocoa, sugar confectionery products (2014-2022)

World	Imported value in US Dollar thousand									
	2014	2015	2016	2017	2018	2019	2020	2021	2022	
COMESA- Aggregation	124,843	163,456	180,836	139,404	161,751	184,663	160,838	200,962	211,925	
1. Sudan	10,223	13,237	14,665	11,070	6,660	17,290	20,636	30,152	40,117	
2. Libya, State of		25,298	62,138	16,455	24,386	33,410	23,908	34,529	37,195	
3. Uganda	20,556	19,546	14,999	15,684	17,727	19,872	19,973	21,252	25,488	
4. Somalia	8,828	11,264	10,370	12,268	14,792	15,343	16,274	18,905	23,823	
5. Egypt	18,557	20,241	7,975	6,599	11,385	12,362	10,453	13,412	12,759	
6. DRC		11,883	7,877	7,798	9,259	8,568	7,417	9,796	11,167	
7. Rwanda	6,297	7,421	9,181	9,915	10,043	10,624	9,482	12,843	8,621	
8. Mauritius	5,461	5,468	5,841	4,919	6,310	6,815	5,956	5,469	7,443	
9. Eswatini	6,040	5,868	4,773	5,951	6,239	7,110	5,178	7,257	6,832	
10. Ethiopia	9,379	10,375	10,796	11,032	11,968	10,998	8,409	6,368	5,040	
11. Kenya	4,191	4,131	3,041	2,697	4,373	3,303	3,559	5,405	4,966	
12. Burundi	412	709	1,339	2,160	2,246	3,790	4,129	4,774	4,902	

13. Djibouti	2,673	4,280	6,004	6,589	7,721	10,003	5,563	5,637	4,558
14. Madagascar	2,646	2,006	2,179	4,780	5,374	5,838	3,799	4,440	4,279
15. Tunisia	3,422	2,606	2,673	2,783	3,259	2,909	2,211	2,631	3,297
16. Zimbabwe	10,154	6,806	3,835	2,816	1,305	157	1,242	4,529	2,871
17. Zambia	5,125	4,992	4,211	4,324	5,328	3,291	1,772	1,978	2,870
18. Malawi	8,157	5,025	7,080	9,398	11,381	10,566	9,022	9,380	2,650
19. Seychelles	746	1,142	1,147	1,155	1,240	1,359	1,052	1,369	1,622
20. Comoros	683	529	513	562	483	707	610	782	1,334
21. Eritrea	1293	629	199	449	272	348	193	54	91

Source: International Trade Centre data on UNCOMTRADE statistics.

Delving deeper into the ‘Non-cocoa sugar confectionery’ sector reveals two distinct product categories. The first, sugar confectionery not containing cocoa (incl. white chocolate, excl. chewing gum). The second category focuses solely on chewing gum, whether it's sugar-coated or not. As the table below demonstrates, COMESA's import demand within this sector overwhelmingly favours sugar confectionery not containing cocoa. In 2022 alone, imports for this category reached a staggering \$146.4 million, significantly outpacing chewing gum imports.

Table showing distributing of Non-cocoa, sugar confectionery products (2014-2022)

Product label	Imported value in US Dollar thousand									
	2014	2015	2016	2017	2018	2019	2020	2021	2022	
1. Sugar confectionery not containing cocoa, incl. white chocolate (excl. chewing gum, HS 170490)	87,135	110,755	137,713	93,588	109,682	119,236	103,040	136,668	146,498	
2. Chewing gum, whether or not sugar-coated, (HS 170410)	37,712	52,702	43,128	45,819	52,066	65,430	57,791	64,296	65,422	

Source: International Trade Centre data on UNCOMTRADE statistics.

### 1.1.1 Chewing gum, whether or not sugar-coated (HS 17.04.10)

Similar to many African countries, a substantial portion of COMESA's trade deficit stems from imports of products that could be manufactured locally, including chewing gum. In 2022, chewing gum imports reached \$65.4 million, reflecting a concerning rise from \$37.7 million in 2014. This trend highlights a missed chance for COMESA member states to boost domestic production and intra-regional trade. As shown in Table below, the majority of these Non-cocoa, Sugar confectionery' imports come from outside the trading bloc, limiting opportunities for COMESA nations to trade with each other. In 2023, Most of the products in this category were supplied by Turkiye (\$ 35.1 million), South Africa (34 million China (\$12.4 million) and Brazil (\$ 9.1 million).

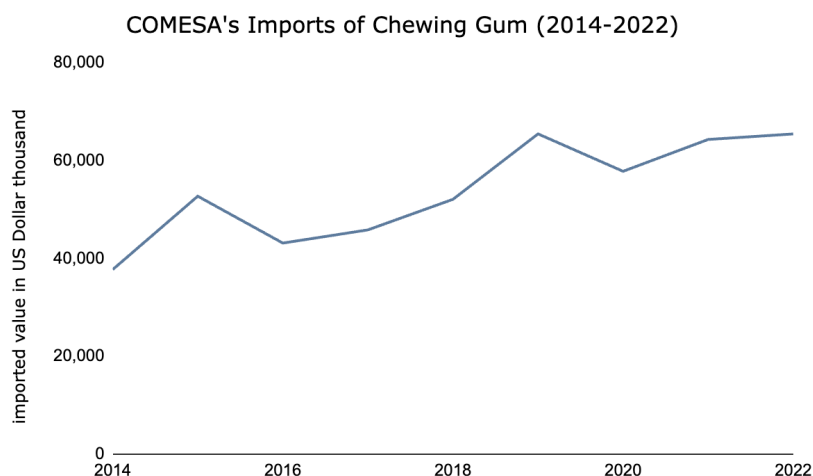


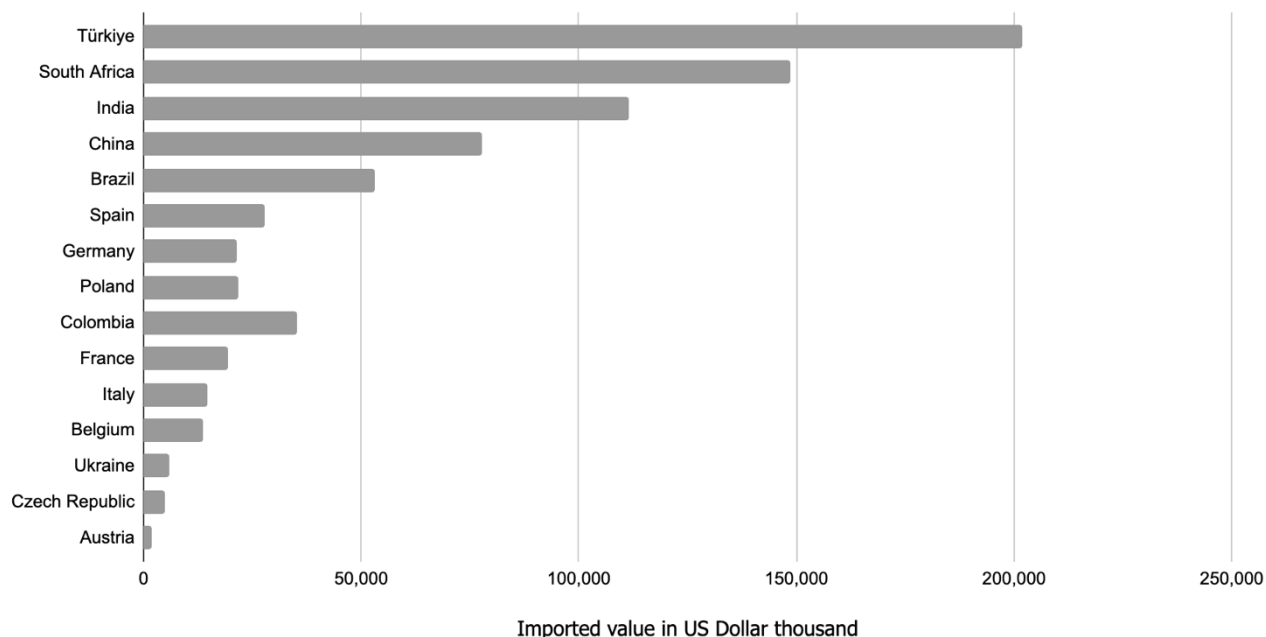
Figure 3

Table showing supplying markets of Non-cocoa, Sugar confectionery products into COMESA (2014-2023)

Exporters	Imported value in US Dollar thousand									
	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
1. Türkiye	17,761	20,123	10,818	10,897	15,281	17,742	17,684	25,484	30,969	35,143
2. South Africa	19,175	14,221	11,076	11,779	13,663	12,436	9,195	11,614	11,242	34,092
3. China	7,740	8,112	5,449	5,743	7,482	9,525	7,971	6,487	6,936	12,426
4. Brazil	6,731	4,078	4,168	4,222	4,376	5,256	3,700	5,528	5,857	9,141
5. Spain	2,252	2,954	1,846	2,168	2,528	2,672	2,632	3,214	3,222	4,343
6. Germany	1,716	1,747	2,019	1,860	2,833	3,337	1,708	1,723	1,817	2,711
7. Poland	2,639	2,510	1,645	1,338	1,820	2,224	2,204	1,969	2,829	2,508
8. Colombia	7,211	4,190	2,433	3,169	4,344	4,187	3,306	2,101	2,049	2,418
9. France	2,272	1,936	2,039	1,771	1,958	2,156	1,224	1,568	2,197	2,157
10. Italy	2,664	2,436	1,386	962	1,026	1,432	1,141	1,067	871	1,867
11. Belgium	1,162	1,216	686	884	1,834	2,299	1,245	1,351	1,366	1,665
12. Ukraine	88	213	302	377	457	527	488	1,290	863	1,354
13. India	6,237	7,754	9,008	10,271	11,983	12,147	13,324	19,139	20,541	940
14. Czech Republic	1	47	165	119	603	690	585	804	875	896
15. Austria	52	53	92	58	130	318	178	107	153	851

Source: International Trade Centre data on UNCOMTRADE statistics.

## Supplying Markets of Non-cocoa, Sugar confectionery products into COMESA (2014-2023)



Africa's current trade landscape presents a significant challenge. With intra-continental trade hovering below 13% of total trade volume, the continent misses out on substantial opportunities for economic growth and business development. This over-reliance on external markets hinders the potential of African businesses to thrive. The analysis of COMESA's Sugars and Sugar Confectionery sector serves as a microcosm of this larger issue. It highlights how a readily produced good like chewing gum is primarily imported, representing a missed opportunity for domestic manufacturing and job creation within COMESA member states.

However, this example merely scratches the surface. In-depth sectoral analyses across various industries are crucial to identify a broader range of opportunities for African businesses. By employing a data-driven approach, we can pinpoint specific sectors with high import dependence that could be revitalized through domestic production. This information empowers businesses at the firm level to develop informed strategies that capitalize on these untapped markets.

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