



REPUBLIC OF THE GAMBIA

Ministry of Trade, Industry, Regional Integration and Employment

The Gambia Trade Policy 2018-2022

**Making the Business Environment Competitive for
Increased Domestic Production and Export Performance**

August 2018

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Foreword by Minister

The Gambia has for many decades maintained an open and liberal trading environment and trade can be an effective engine for growth if properly harnessed. The Gambia's trading landscape is characterized by declining and stagnant domestic exports and an increasing growth in imports, which has led to a 30-year continuous current account deficit except 2003 and 2007.

The Government of The Gambia is keen to use trade policy as an instrument to help transform the Gambian economy and support private sector development for accelerated industrialization, by improving the environment for trade through transparent systems for exports and imports; providing trade-related infrastructure; and articulating forward and backward linkages for trade facilitation. This is consistent with the NDP Strategic Priority Eight (Making the private sector the engine of growth, transformation, and job creation) and will help improve competitiveness of the business environment for increased domestic production and export performance, and help reverse the country's long running trade deficit.

Since 2011 when The Gambia formulated its Trade Policy, many new developments and initiatives have transpired at all fronts. At the national level, the Government has formulated new policies and strategies including the National Export Strategy, a revised investment promotion law (the GIEPA Act 2014), a new National Development Plan, among others. At the regional level, while the Gambia is yet to sign, the regional body ECOWAS has concluded negotiations of an Economic Partnership Agreement with the EU, and at the international level, the African Union has agreed a Continental Free Trade Agreement, all of which will impact trade in the country.

Suffice it to say that with all these new developments, the need to review and update The Gambia's Trade Policy 2011 as well as draft an action plan for its implementation becomes overwhelming. The main objective of the review of the Gambia Trade Policy 2011 is to incorporate relevant new legislation and initiatives, domestic, regional and international that have emerged since 2011 and to align the Policy to the new National Development Plan 2018-2021.

While my Ministry together with its related agencies is the principal institution responsible for formulating and coordinating trade policy in The Gambia, effective and full implementation of the Policy would require broader inter-agency collaboration and coordination. An all-inclusive committee, the National Trade Policy Decision Making Committee is already in place to facilitate the coordination of policy implementation. I therefore call on all concerned Ministries, Departments and Agencies to fully own the Policy and ensure a successful implementation to meet the Policy goal of making The Gambia a competitive and export-oriented economy.

Honourable Mr. Amadou Sanneh

Minister of Trade, Industry, Regional Integration and Employment

List of Acronyms and Abbreviations

AfCFTA	Africa Continental Free Trade Area
AGOA	Africa Growth and Opportunity Act
ASYCUDA	Automated System of Customs Data
AU	African Union
AUC	African Union Commission
BIA	Banjul International Airport
CET	Common External Tariff
CFTA	Continental Free Trade Area
CRR	Central River Region
DFQF	Duty Free Quota Free
DoF	Department of Fisheries
EBA	Everything But Arms
ECOWAS	Economic Community of West African States
EPA	Economic Partnership Agreement
ETLS	ECOWAS Trade Liberalization Scheme
EU	European Union
FSQA	Food Safety and Quality Authority
GBoS	Gambia Bureau of Statistics
GCAA	Gambia Civil Aviation Authority
GCCI	Gambia Chamber of Commerce and Industry
GCCPC	Gambia Competition and Consumer Protection Commission
GDP	Gross Domestic Product
GIA	Gambia International Airlines
GIEPA	Gambia Investment and Export Promotion Agency
GPA	Gambia Ports Authority
GNAIP	Gambia National Agriculture Investment Plan
GRA	Gambia Revenue Authority
GTBoard	Gambia Tourism Board
GTHI	Gambia Tourism and Hospitality Institute
HACCP	Hygiene Analysis Critical Control Points
ICT	Information Communications Technology
ISRT	Inter-State Road Transport scheme
kWh	Kilo Watt Hours
LDC	Least Developed Countries
MOA	Ministry of Agriculture
MOE	Ministry of Energy
MOFA	Ministry of Foreign Affairs
MOFEA	Ministry of Finance and Economic Affairs
MOICI	Ministry of Information and Communication Infrastructure
MOLRG	Ministry of Lands and Regional Governments
MOTC	Ministry of Tourism and Culture
MOTIE	Ministry of Trade, Industry, Regional Integration and Employment
MOTWI	Ministry of Transport, Works and Infrastructure

MSME	Micro Small and Medium Enterprises
MW	Mega Watts
NAWEC	National Water and Electricity Company
NCAC	National Centre for Arts and Culture
NDP	National Development Plan
NES	National Export Strategy
NFSPMC	National Food Security Processing and Marketing Corporation
NRA	National Roads Authority
PURA	Public Utilities Regulatory Authority
DPPP	Directorate of Public Private Partnerships under MOFEA
TBT	Technical Barriers to Trade
TFA	Trade Facilitation Agreement
TPR	Trade Policy Review
TSGB	The Gambia Standards Bureau
SPS	Sanitary and Phytosanitary Standards
WCR	West Coast Region
WTO	World Trade Organization

1 General Introduction

This trade policy is a manifestation of the resolve of the Government of The Gambia to make trade a tool for sustainable socio-economic development and advancing the cause of Gambian private sector as engine of growth, transformation and job creation in line with the National Development Plan (NDP) 2018-2021. The policy, valid for five years (2018-2022), is designed to reflect the range of opportunities and challenges facing The Gambia in the country's efforts to address persistent poverty and growing inequalities. It emphasizes the critical issue of implementation, not only of the policy itself, but also interrelated sectoral policies, existing trade agreements and relevant regional and continental initiatives needed to harness trade for development.

1.1 Background

During the past two decades, economic progress in The Gambia has been marred with challenges largely associated with deteriorating climatic conditions (drought, late and insufficient rains). GDP growth over the years has been volatile, while steady and high growth rates are needed to achieve sustained and inclusive poverty reduction. In effect, the long term GDP growth from 1994 through 2013 has been undulating and unstable, averaging a modest 3.5% per year against an average of 4.1% for Sub-Saharan Africa. Successive medium term development plans towards the realization of the country's long term goal of attaining middle income status have not generated the growth required for that purpose.

Furthermore, implementation of economic reforms over the years has been marred by policy slippages, expenditure overruns and other external shocks. The Gambia remains prone to external shocks as its main sources of foreign exchange: agriculture, tourism and re-export trade activities are all heavily dependent on exogenous factors. This situation has been adequately captured by the country's new National Development Plan 2018-2021 which described a stalled economy arising from several shocks, including a poor 2016-2017 agricultural season, which drastically reduced the groundnut crop; a severe contraction of tourism receipts during the traditional high season ascribed to the political impasse following the December 2016 presidential elections; and volatile oil and commodity prices.

The Gambia has for the last three decades maintained an open and liberal trading environment and has used trade policy as an instrument to help transform the Gambian economy and support private sector development. In spite of the various trade-related policies adopted by The Gambia, the trading environment has not been very competitive as envisaged and cost of doing business is still relatively high with exports base being underdeveloped. As stated in the National Development Plan, The Gambia's trading landscape is characterized by declining and stagnant domestic exports and an increasing growth in imports, which has led to a 30-year continuous current account deficit (except 2003, 2007). This therefore calls for a more strategic approach to

trade policy to strengthen sectoral linkages and stimulate private sector to participate in the key sectors of the economy.

1.2 Linkages with other Relevant Policies

In developing this Trade Policy 2018-2022, reference is made to a number of policy documents to ensure policy coherence to national development objectives. The trade policy is thus anchored on National Development Plan 2018-2021 which is the overarching development policy document and other key strategies and policies such as the Trade Strategy and Industrial Policy, the National Export Strategy (NES), the Micro Small and Medium Size Enterprises (MSMEs) Policy and Strategy, and the National Quality Policy.

The Policy also takes into consideration other trade-related regulatory instruments and policy frameworks including the Gambia Competition Act, the Consumer Protection Act, the Private Sector Development Strategy, and the Agriculture and Natural Resource Policy 2017-2026. Both the Agriculture and Natural Resource Policy and the Gambia National Agriculture Investment Plan (GNAIP II) have policy objectives that are consistent with the objectives of the Trade Policy. The focus is on leveraging trade as a means for development and working to increase private commercial investments in agriculture which has potential to further attract investments on agriculture value chain including agro-processing and marketing for enhanced trade. This is important given the fact that despite the objectives of GNAIP to promote investments in the sector, agriculture in The Gambia suffers from underinvestment with only about 3% of commercial bank loans going to agriculture in 2013.

The Policy also takes cognizance of key sector policies and frameworks in fisheries, tourism, energy and ICT as they relate to boosting the potential of the Gambian economy to trade. The implementation of the above policies by relevant sectors will therefore contribute to improving the business environment, developing trade productive capacities and a competitive private sector that will enable The Gambia to integrate into both the regional and global economy.

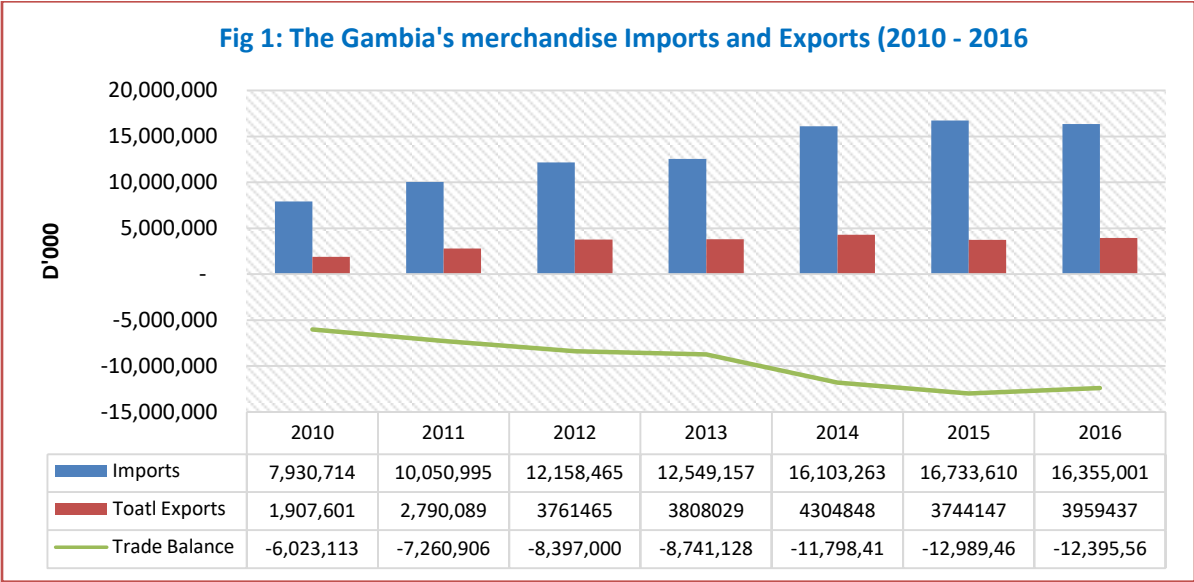
2 Trade and Policy Directions

2.1 Direction of Trade

The Gambia's balance of trade has been deteriorating since the last Trade Policy was formulated in 2011. The value of imports increased substantially from D7.93 billion in 2010 to D16.36 billion in 2016. The value of total exports, which is predominantly re-exports, also substantially increased from D1.91 billion in 2010 to D3.96 billion in 2016. While both imports and exports increased substantially during the period (106% and 107% respectively), the effect on the trade

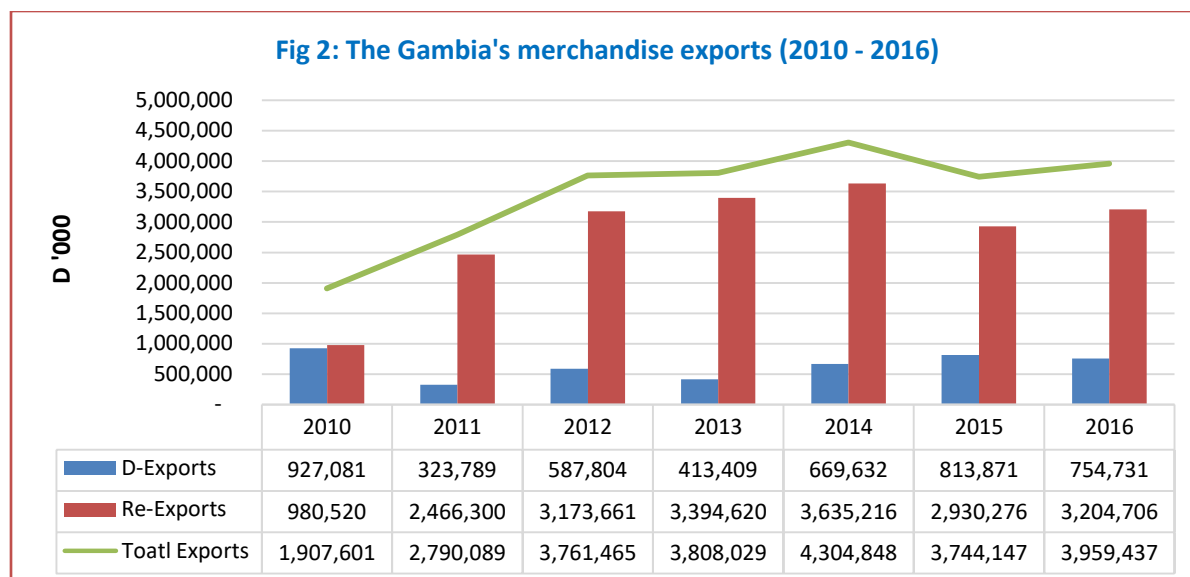
deficit has been minimal as The Gambia’s trade balance deteriorated significantly from a trade deficit of D6.02 billion in 2010 to D12.4 billion in 2016.

The trend of The Gambia’s merchandise imports and exports is show in Figure 1 below.



2.1.1 Exports

The Gambia’s export base is very narrow and dwindling, consisting of a few product groups. Of the country’s total exports in 2010, 48.6% constitute direct exports while the rest are re-exports. The share of direct exports reduced drastically by 2016 to represent only 19.1% showing the growing importance of re-export trade in the country’s trading landscape, as shown in Figure 2 below. The Gambia’s main domestic exports are groundnuts, cashew nuts, and fisheries products.



The table below shows the 20 top products from 2012 to 2016, with the three main exports from The Gambia being shelled groundnuts, cashew nuts and crude groundnut oil. The value of shelled groundnuts increased over the 2012-2016 periods, but the exports of cashew nuts and crude groundnut oil has been very erratic. The persistent trade deficit, due mainly to a narrow productive and export base, and weak domestic and international trade linkages and systems, remain a key challenge for The Gambia.

Top 20 Products Exported 2012-2016 (FOB Value US\$'000)

Product	2012	2013	2014	2015	2016
Shelled Groundnuts	1,723.97	2,411.06	482.02	4,025.90	8,683.29
Cashew nuts	3,019.88	5,711.28	4,998.56	2,788.75	1,999.22
Crude groundnut oil	3,306.71	-	-	4,960.13	-
Frozen flat fish	169.82	71.59	133.37	1.98	-
Frozen fish, nes	23.55	152.54	122.71	250.66	-
Other prepared or preserved fish	1,347.43	177.28	60.05	29.74	12.52
Guavas, mangoes and mangos-teens	-	33.36	85.89	90.21	27.98
Fresh or chilled Salmonidae	121.41	42.42	363.51	0.75	262.24
Shrimps and prawns	35.82	37.56	47.63	277.29	694.91
Dried fish, not smoked	49.58	60.75	51.86	686.19	75.06
Cuttlefish and squid	-	120.13	26.02	269.25	47.78
Unused postage, revenue or similar stamps	200.98	153.54	96.19	42.71	47.03
Frozen Salmonidae	-	363.93	495.24	126.63	-
Smoked fish	31.65	4.54	-	145.45	5.28
Anchovies salted or in brine	3.13	10.70	-	54.66	642.90
Fresh or chilled flat fish	16.44	0.50	279.51	52.05	25.93

Cuttlefish and squid, live, fresh or chilled	7.97	30.52	22.80	91.55	95.08
Fuel wood, in logs	299.69	31.93	-	-	-
Octopus (excl. live, fresh or chilled)	-	13.88	30.08	25.04	-
Total	10,386.13	9,427.51	7,295.46	13,918.95	12,619.21

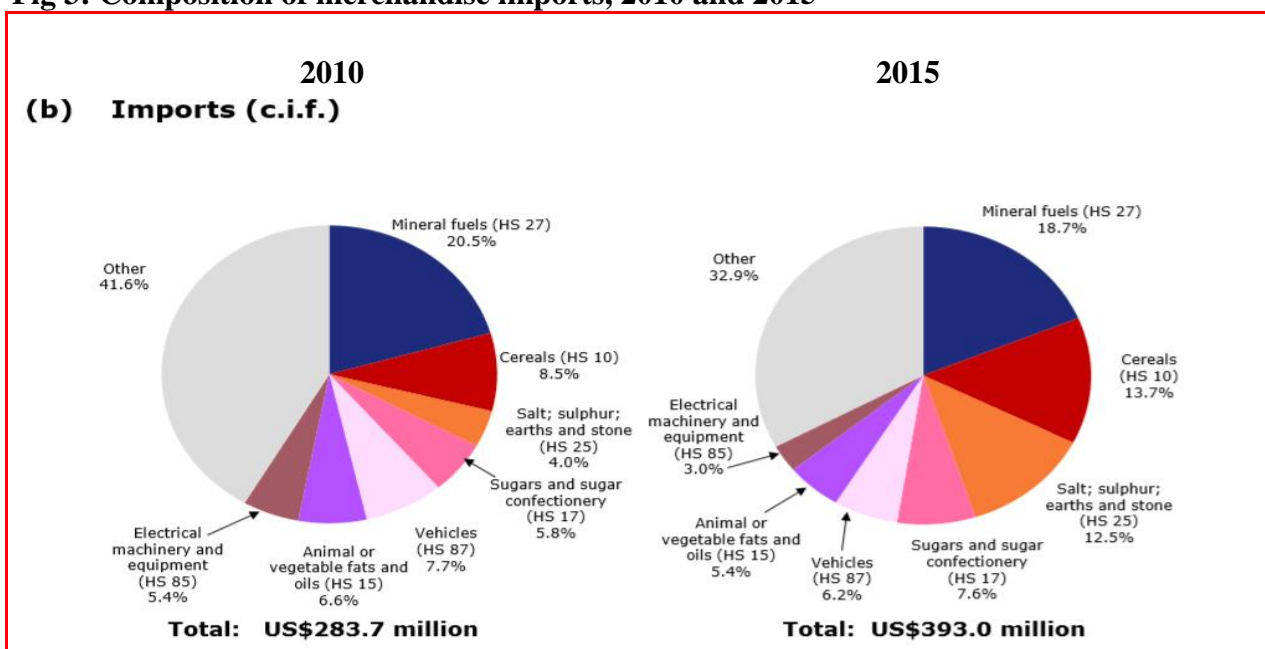
Source: Industrial Policy and Trade Strategy (2018)

The Gambia's main export market is Asia, where over 50% (2015) of The Gambia's goods are destined, mainly to Vietnam, India and China. The second largest export market is the European Union, where about of 42% (in 2015) of The Gambia's goods are exported to.

2.1.2 Imports

The Gambia's imports are dominated by foodstuffs (particularly rice, sugar and vegetable oils), fuels, cement, vehicles, and capital goods. Figure 3 below shows the composition of The Gambia's imports in 2010 and 2015.

Fig 3: Composition of merchandise imports, 2010 and 2015



Source: Gambia Trade Policy Review 2018 (WTO Secretariat report)

In 2015, imports mainly originated from the European Union, West Africa (mainly Côte d'Ivoire and Senegal), Brazil (notably for sugar) and China. Imports from Côte d'Ivoire were predominantly fuel while those from Senegal were mainly cement.

2.2 Broad Policy Direction

The strategic direction of The Gambia Trade Policy 2018-2022 is guided by the National Development Plan, which among other things, seeks to revitalize and transform the Gambian economy for the wellbeing of all Gambians. The Policy is therefore linked to the NDP strategic goal of creating an enabling environment for the private sector to thrive and create decent jobs as well as to the Industrial Policy 2018, which emphasizes the need for:

- Industrial development to be based on export-oriented sectors that are competitive on the international market;
- labour-intensive industries to be given prominence as a way to exploit the comparative advantage of The Gambia's labour and to maximize employment creation;
- the private sector to be fully supported to lead the industrialization process through the creation of an enabling environment and the establishment of an effective public-private dialogue; and
- the public sector to be given a strong role to play, not merely as a facilitator but also as a leader, in providing direct support, co-ordination and through market access negotiations with other countries.

2.2.1 Policy Goal

The overall goal of the Trade Policy is to make The Gambia a competitive and export-oriented economy led by private sector growth for employment creation and poverty reduction through trade.

The Government is keen to use trade policy as an instrument to help transform the Gambian economy and support private sector development for accelerated industrialization, by improving the environment for trade through transparent systems for exports and imports; providing trade-related infrastructure; and articulating forward and backward linkages for trade facilitation. This is consistent with the NDP Strategic Priority Eight (Making the private sector the engine of growth, transformation, and job creation) and will help improve competitiveness of the business environment for increased domestic production and export performance, and help reverse the country's long running trade deficit.

The trade policy emphasizes the centrality of the government in creating the enabling business environment that supports private sector development for wealth creation and trade development. It is envisaged that the policy will:

- Provide the necessary framework for more sectoral policy coherence to support private sector participation in key sectors for enhanced trade;
- Create a transparent mechanism for trade;
- Build up capacity for participation in international trade negotiation;
- Provide trade-related infrastructure to support trade development;

- Promote export diversification;
- Promote competition and protect consumer welfare;
- Strengthen the country's cooperation with her neighbours
- Stimulate greater trade capacity development for domestic and export markets.

2.2.2 Policy Outcomes

The outcomes of the Gambia Trade Policy are aligned with the trade outcomes of the NDP. The aim is to address the current challenges in the business environment, support private sector participation in the key sectors of the economy to improve productive capacity development with a view to realizing the following outcomes:

- diversified and increased domestic and export trade;
- diversified export markets;
- Increased competitiveness in the domestic market
- Increased participation of MSMEs in both domestic and export trade;
- reduced trade deficit;
- increased productivity and productive capacity of the private sector;

2.2.3 Objective of the Trade Policy

The objective of the Trade Policy is to establish and maintain a competitive and liberal trading environment that is supportive of private sector development for export led growth. The Policy also has the following specific objectives linked to the policy goal:

- To stimulate the public and private sectors to invest and develop competitive and sustainable supply and productive capacities including through technology upgrading, agro-processing, efficient manufacturing and skills development with particular attention to women and youths, to accelerate exports and economic development.
- To facilitate the fuller participation of exporters, especially MSMEs in regional and international trade in order to take advantage of trade opportunities as a means to reduce poverty and improve economic well-being.
- To create an enabling environment for investment, including foreign direct investment, in order to produce increasingly competitive goods and services for the domestic and export markets, including value addition and diversification as well as product quality development to meet international standards.
- To facilitate and stimulate the establishment of coherent and well-coordinated trade and trade-related capacity-building, including human resources development and addressing industry-specific supply-side constraints and export promotion activities.

2.2.4 The Rationale of the Trade Policy

Since 2011 many new developments and initiatives have taken place both at the national and regional levels. At the national level, a new National Development Plan has been formulated and effective since February 2018, and other new policies have also been adopted including the Industrial Policy and Trade Strategy, the National Export Strategy, Gambia Investment and Export Promotion Act has been revised, among others. At the regional level, ECOWAS is finalizing the development of ECOWAS Common Trade Policy, the EPA negotiations have been completed and the Agreement is being signed, and the African Union has recently agreed on a Continental Free Trade Agreement which will all impact trade in the country.

At the international level, business environment is changing very fast due to innovation and technological changes with rapid development of e-commerce to support businesses. These transformations are intensifying competition forcing businesses to be innovative and strive for higher quality and lower prices of goods and services.

This therefore calls for a dynamic process of trade development to stimulate the competitiveness of Gambian goods and services in both the domestic and regional markets as the stepping-stone to more effective entry and participation in the global market. Trade policy must stimulate the adoption of trade development strategies that respond proactively to the emerging opportunities and challenges and address the current trade development challenges The Gambia is facing.

The Trade policy will focus on measures to improve competitiveness; to support production activities for the domestic and international markets; to establish and strengthen infrastructure for enhanced market access abroad; to ensure a fair trading environment for producers and consumers; to establish an efficient trade information system; and to strengthen bilateral, regional and multilateral trade cooperation.

3 Opportunities and Challenges to Trade Development

3.1 Key Sectors for Trade Development

Support to key sectors of the Gambian economy will be a key focus of the Trade Policy as Government looks to reverse the declining trend of Gambian exports. Without minimizing the importance of re-exports, the objective is to support and develop capacity to enhance direct exports and promote a vibrant local manufacturing industry that adds value, creates jobs and wealth for poverty reduction. This is in line with the spirit that underpinned the restructuring of the Gambia Investment and Export Promotion Agency (GIEPA) in 2014 with added mandates for export promotion and enterprise support.

The Trade Policy advocates for GIEPA to be adequately resourced to effectively carry out its mandate, including operationalizing the MSME Fund to support small businesses, most of which

are owned and operated by women and youths. There is also need for Government to centralize all investment promotion activities within the Agency and avoid the creation of parallel units within other government arms, as this fragmentation of efforts and resources will not only undermine GIEPA but also lead to inefficiency.

Collaboration between GIEPA, GTBoard and the Gambia Chamber of Commerce and Industry (GCCCI) will be encouraged in the drive to ensure a vibrant private sector. Similarly, the investment incentive regime needs to be reviewed to make it more effective. While priority sectors and regions have been identified for investment promotion by GIEPA, Trade Policy interventions will focus on a few key sectors with greatest potential to impact on the country's productive base and support a vibrant export activity. These include agriculture, fisheries, tourism, energy, ICT and manufacturing.

3.1.1 Agriculture

Agriculture remains a dominant sector in the Gambian economy in terms of contribution to GDP, employment and livelihoods. With more than half the country's total land mass considered suitable for agriculture use, and utilized mainly for upland cereal and groundnut production, grazing or under fallow, The Gambia thus have major environmental resources and opportunities for enhancement of the production and productivity of the agricultural sector.

The Gambia Trade Strategy and Industrial Policy 2018, quoting available information (GBoS 2016 Statistical Abstract), indicates that the areas under cultivation have been decreasing, from 369,954ha in 2012 to 336,440ha in 2013 to 315,142 in 2014. Similarly, the total production of grains (millet, sorghum, rice, sesame and findi) and legumes (groundnuts and cowpeas) have been steadily declining from 345,297mt in 2012 to 321,740mt in 2013 to 257,287mt in 2014. This means that The Gambia is not self-sufficient in its own staple crops and needs to import food items such as cereals because it does not grow enough of its own cereals.

In view of the importance of the sector, the Government envisages measures under the National Development Plan that will enhance the sector's contributions to growth and employment, improve farmers' livelihoods and export earnings from premium markets. Much like in the Fisheries sector, the Trade Policy advocates for a more business oriented approach to supporting the agriculture sector. The promotion of PPPs in the sector and quality enhancing interventions to farmers' associations could yield rapid returns to the economy.

A coherent agricultural logistics strategy that supports the agriculture and fisheries sectors as well as a comprehensive Land Policy that addresses usage of agricultural land would be critical dimensions of such support measures. Similarly, implementation of one-region one-commodity policy in the production of agricultural commodities can help improve production and quality. For instance, Government can have a CRR rice policy that seeks to coordinate efforts between farmers and farmer associations in CRR to boost self-sufficiency in rice production as well as improve on its quality. In terms of exports, a WCR Cashew strategy would consolidate all the

efforts of the key players in the cashew sector for improved volumes and quality of cashew for exports. Furthermore, foreign entities could be encouraged to set up processing facilities in-country as opposed to exporting our raw cashew and other produce for processing abroad.

The Gambia has certain advantages that make investment and support to agriculture a business case that is worth pursuing. The country's proximity to Europe and the USA; its deep water port; a navigable river along the entire length of the river; good airport infrastructure that can accommodate the largest cargo planes, means the country can easily handle large volumes of exports. In effect, the modern cargo processing facilities at the airport can make the international airport at Banjul a cargo centre for breaking bulk and freight for the ECOWAS region and facilitate the exports of horticultural and agro-processed products.

For the effective transformation of the sector to happen however, the Gambia must move away from over reliance on rain fed cultivation which exposes the sector to external shocks. Investment in irrigation schemes and establishment of large scale rice milling machines across the country to support farmers is important to boosting production and food self-sufficiency. Similarly, technical expertise in research in improving and distributing quality seeds, poor farm management practices, as well as other structural, organizational and financial constraints must be addressed.

As articulated in the National Development Plan, it is an objective of the national Trade Policy to advocate key interventions that will enhance productivity and diversify local production. Introducing high value products such as findi, moringa, sesame, honey, cashew and horticulture for both export and the domestic market; and creating market linkages focusing on building the quality infrastructure and hard infrastructure for agricultural products, are but a few strategies that would be pursued.

3.1.2 Fisheries

The Gambia is endowed with considerable riverine and marine fish resources. The country is located within the Eastern Central Atlantic Ocean, an area classified as one of the richest fishing zones of the world. The Fisheries Policy (2007), Fisheries Act (2007) and Fisheries Regulations (2008) provide the policy, legal and management framework for the fisheries sector in the Gambia. There are also fisheries management plans for shrimp, sardinella, sole and catfish species, prepared in 2009 which provide guidelines to communities on sustainable use and management of fisheries resources.

The strategic location of The Gambia positions the country to be able import and export efficiently to the rest of the world. The country has the potential to offer the most efficient clearance, Port Handling and Freight management services to facilitate the trade of fisheries in accordance with buyer requirements. However, the fisheries sector has not been performing to its potential in terms of exports. This is mainly because most fishing is done by local fishermen using small boats within the territorial waters (12 nautical miles) while the industrial fishermen

who operate in the Exclusive Economic Zone (200 nautical miles) do not usually land their catch in the Gambia. With a modern Fisheries Jetty now operational at the Port of Banjul, the Gambia should take advantage of her location to develop the sector through supply chain and logistical development that encourages more fish landing and processing for exports.

The Trade Policy calls for a more business oriented approach to interventions in the fisheries sector through greater emphasis on the formation of business partnerships between Government and the Private Sector to provide services to facilitate the production of fish. The aim is to support and capacitate the Gambian labor force, in particular women and youth, to specialize and benefit from economies of scale in fishing and fish processing. Opportunities for income generation and employment creation among the youth and women are diverse in the fisheries value chain through services in sanitation, logistics, marketing and transport to support its landing and export activities; and all these opportunities need to be exploited. The country also has potential in aquaculture, which if fully exploited, could generate significant employment for women and youths, and contribute to food and nutrition security.

Gambian fishing companies have lamented the uncompetitive conditions in the fisheries sector due to rising cost of fuel and fishing materials and limited access to finance. Similarly, fisheries stakeholders called for the review bilateral fisheries agreements as well as the requirement for fishing companies to land 10 percent of their catch to encourage more Gambian fishermen and minimize revenue leakages. Partnerships between some of these companies and the Government would facilitate for a cost sharing venture that would enable them to be more competitive.

The development of a cold chain strategy and implemented through partnerships with private entities could boost the quality of exports and create value adding employment along the chain. One way this can be done is through the establishment of specialized refrigerated transportation companies and quasi-private sanitation services suppliers to support the movement of quality fish and fishery products along its value chain.

These partnership initiatives could be operated through a business model involving a business entity and the Government within a robust legal system. Under the arrangement, Government should look to sell the company once successful to the private business partner for their full ownership.

3.1.3 Tourism

The Gambia tourism sector is the main source of foreign currency for the Gambia, remains a major contributor to job creation directly and indirectly, and therefore continues to be among the top priorities for the Government. The sector has over the years contributed significantly to GDP and employment with a certain number of major investments in hotels by the private sector and other tourist related infrastructures by the Government. However, the sector's full capacity is mostly underutilized with challenges in the areas of competition, service delivery and quality

infrastructure, limited product diversification, and limited linkages between other productive sectors and the industry.

Furthermore, to support the industry to achieve its goal of being a tourist haven by 2020, coordination between the Ministry of Tourism and Culture and the satellite institutions (Gambia Tourism Board – GTBoard, National Centre for Arts and Culture – NCAC and Gambia Tourism and Hospitality Institute – GTHI) with the Ministries responsible for Agriculture and Trade must be strengthened. Such coordination and collaboration could facilitate forward and backward linkages between tourism and agriculture and thereby providing markets for local produce. Also, the inability of tourism to have a significant impact on the rural population means that a lot needs to be done to address this. The Government, under the new National Development Plan, intends to make the sector highly competitive and to ensure that it is people and culture centred.

As a key ingredient to, and an essential component of, the National Trade Policy, efforts will aim at focusing on measures to diversify tourism products through linking the production sector through value chain approach to meet the needs of the industry. Strategies will also aim to harness the opportunities offered by the sector, particularly development of the infrastructure and promotion of cultural and historic sites, promoting performance arts, increasing inclusive tourism, enhancing skills development as well as support to the development of eco-tourism. The government, through stakeholder engagements, will work to improve quality of service delivery through continuous capacity building and with increase investment in the industry.

3.1.4 Energy

Electricity has been cited by the private sector as the biggest stumbling block to expansion, especially in the energy hungry sectors (manufacturing, industry, and hotels and hospitality). Government, together with international development partners, is working on putting NAWEC on more sustainable financial path and address the governance issues within the company. Availability of reliable and affordable energy is a critical ingredient for sustained economic growth and development.

Electricity generation in the Gambia is largely fossil fuel based with heavy duty generators. Consequently, the energy generation, distribution and cost remain major challenges thereby affecting the productivity of the manufacturing sector and business operations. The gap between the installed capacity and available electricity supply is wide (installed capacity countrywide is 99MW of which 55MW is available), while the overall demand of energy is up to 150MW. Similarly, electricity tariff rates are relatively high at D11.65/kWh for industries and domestic consumers and agriculture D10.14/kWh, which is costly for the development of industries and the growth of businesses.

The development of the energy sector will spur the growth of the businesses and ensure the productivity of the economy. As a result, the Trade Policy envisages a renewed focus on

improving the policy and regulatory environment to attract investments, but also improving access to electricity and enhancing manufacturing and industry energy security. The medium and long term solution however lies in energy generation and distribution with the application of sustainable energy solutions with emphasis on the use of clean energy technologies such as renewable energy production to support national development. Already significant strides have been undertaken as part of the OMVG energy programme which will allow the country to access cheaper and renewable energy from sister countries within the subregion.

It is expected that diversifying the country's energy mix will help reduce the cost associated with the productivity of the industries and thereby enhance the growth of businesses. To support the industries and business growth, the National Trade Policy aims to identify and advocate for continued production and accessibility of energy with specific focus on reducing the production cost associated to energy consumption, both for manufacturing sector and small and medium-sized enterprises.

3.1.5 ICT (e-commerce)

The Gambia has made significant strides in recent years in terms of developing the information and communications (ICT) sector for the provision of affordable communications and internet services to the Gambian people. The Gambia is linked to the Africa Coast to Europe (ACE) undersea cable that will provide The Gambia with a fibre-optic link to 19 other African countries (including 2 landlocked countries) as well as 3 European countries; which offers huge potential for using ICT to enhance trade and development through e-commerce.

Further efforts to foster a competitive market environment are still needed to maintain this momentum of growth, particularly on electronic commerce (e-commerce) which has potential for development and growth. The e-commerce facilitates the production, distribution, marketing, sale or delivery of goods and services by electronic means. The government recognizes the development implications of electronic commerce, including the economic, financial and trade, particularly on small- and medium-sized enterprises (SMEs), and will work to harness e-commerce as a means of maximizing possible benefits accruing to them.

The updated National Information and Communication Infrastructure policy (NICI II) has highlighted the need for infrastructure development on e-commerce. With the implementation of the National Broadband linking the backbone to consumers thereby enhancing internet speed, information technology can become a critical factor in the integration of the country in the multilateral trading system and promoting the growth of business in distribution of goods and services.

In order to ensure coherence of efforts in advancing e-commerce, the Government through the National Trade Policy aims at strengthening the ICT infrastructure to handle the growing demand of the use of information technology by businesses. The Government will also

strengthen and continue to improve the regulatory environment and the ecosystem for ICT and ICT-related sectors to flourish. This will thus require the need to formulate a robust regulatory framework to address issues of cyber security and tackle the risk associated to e-commerce by businesses. Government will set up a national data centre under a new information and communications agency which will also address internet and cyber security.

3.1.6 Manufacturing

Manufacturing sector remains a key economic driver for many countries, especially the developed nations. It assumes an important role in the structural transformation of an economy that is dominated by primary products into a modern economy with high productivity. As manufacturing sector creates wealth and jobs for poverty reduction through value addition, it remains at the heart of almost all international trade disputes due to its increasing significance. Economic growth, when supported by a solid manufacturing base, becomes more inclusive, sustainable and resilient to external shocks. Manufactured goods are crucial for the growth of the services industry, which to a large extent depend on manufacturing as its foundation, therefore the sector serves as vital link between the primary sector of an economy and the services industry.

Economic Activity in The Gambia is however characterized by: Services which contributes about 55% of GDP – and consist mainly of Trade, Tourism, Transport, and Communication; Agriculture which contributes on average 30% of GDP – employing nearly half of the working population; and Industry, mainly agro-allied which contributes on average 15% of GDP of which manufacturing, predominantly light manufacturing, (stagnant since 1995) constitutes 5.5% in 2014. This structure has not been successful in transforming the economy from its low production and productivity to a highly productive economy.

For effective transformation of the economy, serious attention must be given to promoting manufacturing. By adding value to the agriculture output for instance, giant strides would have been taken to reducing poverty given the high proportion of the working population involved in the agriculture sector, as agro-processing will create a ready market for farmers thereby boosting production and productivity. Increased agriculture production and productivity would free up vital human resources that could be deployed to other sectors of the economy.

Manufacturing in the Gambia is faced with many challenges including inadequate supply and relatively high cost of electricity which has reduced competitiveness of Gambian business and ability to attract high value Foreign Direct Investments (FDIs); high cost of borrowing due to high interest rates together with an underdeveloped and undiversified financial market, severely limiting access to finance; high taxes together with many nuisance taxes and overlap of national and local taxes which pose heavy burden on businesses; and limited human resources with requisite technical skills together with low entrepreneurship drive which hinder the growth of the sector.

In light of the importance of the sector, there is a strong business case to promote manufacturing in the Gambia. Manufacturing involves heavy investments that require a long term perspective, as such, needs government support and protection.

3.2 Market Access Schemes: Opportunities and Constraints

The Gambia as an LDC is expected to enjoy preferential schemes wherein her products are not subjected to tariffs in most export markets including EU, USA and duty-free, quota-free (DFQF) access in most major developed and developing members of WTO. In the same vein, the Gambia belongs to ECOWAS and has access to its market that offered opportunities to boosting trade with application of integration instruments. However, the country has a narrow trading base, with heavy reliance on two export sectors (agriculture and tourism) for foreign exchange earnings. Recent years have witnessed declining and stagnant domestic exports and increasing imports which have led to a continuous current account deficit. Some progress has been made in positioning the country through liberalization to source inputs for increased production for exports. However, supply side constraints including limited production capacity, undiversified products, quality and standard requirements, and insufficient institutional coordination are factors affecting the Gambia in her efforts at exploiting the opportunities in these trading markets. The need to focus on technology and innovation advances, finance and capacity building, education and skills development will be important cushions for utilization of the market opportunities.

3.2.1 ECOWAS Market and EPA

The Gambia as a Member of the Economic Community of West African States (ECOWAS) is expected to sign the Economic Partnership Agreement (EPA) that will pave the way in boosting trade between the Gambia and European Union (EU). The EPA is aimed at assisting the integration of ECOWAS countries into the global economy, taking into account on a case-by-case basis, Member States development priorities, and thereby paving the way for sustainable development and contributing to poverty eradication.

The products from the European Union will be liberalized over a period of 20 years, with a significant portion of tariff lines (25%) which will not be liberalized at all and remain subject to normal duty. The EPA will offer the country in its integration into the global and regional trading system with the use of the categories already set out in the ECOWAS Common External Tariff (CET).

The Economic Partnership Agreement offers the opportunity for the development of the country's industries, particularly for inputs and technology transfers as it will simply guarantee duty free, quota free, access to the EU market for all Gambian products. The EPA will allow Gambian companies to easily source inputs from elsewhere without losing their free access to the

EU, thus offers new industrialization opportunities and incentives for The Gambia to invest in productive activities

As a reciprocal Agreement, the EPA will also affect the Gambia and therefore require an adjustment strategy for the development of small and medium sized industries. In mitigating the effect and promoting the development of industries establishment, the government will promote the development of infant industries through participation in EPA and will also carry out reforms to address the adjustment cost associated with this market access opportunities.

3.2.2 African Market and the CFTA

The Gambia is one of the founding members of the African Union established in May 2001 to succeed the Organisation of African Unity established in May 1963. The country is also a signatory to the Abuja Treaty establishing the African Economic Community in June 1991 with the objective to promote regional integration and harmonization within the Continent.

The 18th Ordinary Session of the Assembly of Heads of State and Government of the African Union held in January 2012 in Addis Ababa, Ethiopia under the theme “Boosting Intra-African Trade took important Decisions aimed at enhancing trade integration in Africa. The Assembly through a decision and a declaration endorsed an action plan for Boosting Intra-Africa Trade and agreed on a roadmap for the establishment of an Africa Continental Free Trade Area (AfCFTA) by an indicative date of 2017.

The 25th Ordinary Session of the Assembly held in June 2015 in Johannesburg, South Africa launched the AfCFTA negotiations as the first step in the implementation of AU Agenda 2063: the “Vision” for an integrated, prosperous and peaceful Africa. It is anticipated that the Agreement to establish the AfCFTA will launch the “Single Liberalized Market for Trade in Goods and Services” covering a market of 1.2 billion people and a gross domestic product of \$2.5 trillion, across all 55 members.

The Gambia has participated in the negotiations at all the stages and signed the Agreement in March 2018, which will help increase and open up Gambia’s market size for export market diversification. The Government will therefore strengthen its cooperation with the AUC-AfCFTA Secretariat and other technical partners to build the necessary capacity of the Gambian private sector as well as address the necessary institutional supply-side constraints to encourage exporters to take advantage of the market access offers under the AfCFTA.

3.2.3 EBA, AGOA and Other Market Preferences (DFQF Schemes)

The Gambia like other Least Developed Countries (LDC) is accorded with market access preferences for its exports. The schemes allow beneficiary countries’ goods to have access to foreign markets and the preferences are either accorded multilaterally or unilaterally. The

preferential market access scheme within the multilateral trading system has been used as a mechanism to stimulate export growth in least developed countries. Preferences to some extent are beneficial for these countries especially when it is non-reciprocal and transparent in its application.

As a country the market access opportunities available to the Gambia at global level include the generalized system of preference (GSP) and other preferential initiatives such as European Union Everything but Arms (EBA) scheme for LDCs and the USA African Growth and Opportunity Act (AGOA) for African countries. In addition, India, Korea, Brazil, South Korea, Morocco and China as developing countries have accorded LDCs including the Gambia duty-free-quota-free (DFQF) or reduced duty on exports into their markets.

The Gambia continues to access the EU market under the EBA offered to the LDCs and thus EU remains as one of its biggest export market. The Gambia's traditional export products to the EU remain fruits and vegetables, horticultural products, fish and fishery products and groundnut. The market access preferences in particular the EBA have been available to the Gambia for many decades, but there is little evidence on whether the preferential access durably boosts our exports performance generally or even to the EU market.

The full usage of this scheme by the Gambia has some limitations and challenges based on the supply side constrains, inadequate quality infrastructure, market information to name a few, to meet EU market standards. In line with the National Development Plan, the Trade Strategy and Industrial Policy, and considering the enforcement of the Economic Partnership Agreement between EU and ECOWAS Member States, the Government going beyond the EBA will continue to maintain access to the EU market through well-articulated strategies.

The US AGOA is a unilateral preferential scheme for African Countries, with the exception of North Africa, enacted in May 2000. It has been renewed to 2025 together with the Third party Country Fabric (TCF) provision, allowing AGOA eligible countries to source fabrics from third countries to produce textile and apparel products bound for exports to the USA duty-free-quota-free. The renewed AGOA has also simplified customs procedures and expanded rules of origin to allow for combination of inputs from AGOA beneficiaries to count in meeting the rules of origin also referred to as cumulation, with the objective to improve its utilization and to enhance regional integration and growth through value addition.

It could be recalled that in 2014, the Gambia's eligibility to AGOA was revoked by the Government of the United States, due to the non-adherence to the AGOA principles or criteria such as upholding human rights and good governance. In 2017 after the change of Government in 2016, the Gambia was put back on AGOA though the textile visa has not been restored. Prior to the country's removal from AGOA, training and information sharing sessions were held and identification of AGOA potential enterprises in the relevant sectors carried out.

AGOA does present a significant market opening for eligible African countries to drive industrialization in selected sectors. Nonetheless, this opportunity will remain meaningless in the absence of the capacity of AGOA beneficiary countries to produce, attract US investors, the yearly country eligibility reviews and the uncertainties in renewal of AGOA beyond 2025 as well as the US trade landscape that seems to be moving from unilateral preferences towards reciprocal arrangements. The Government of the Gambia will continue to engage Ministries and agencies to maintain Gambia's eligibility in the remaining 7 years of AGOA.

3.3 Trade Facilitation Issues and Constraints

An important element of trade policy, trade facilitation refers to the simplification and harmonization of international trade procedures to expedite the movement of goods across borders, and reduce trade costs. WTO Members concluded negotiations on a landmark Trade Facilitation Agreement (TFA) in December 2013, and The Gambia deposited its instrument of acceptance of the TFA on 11th July 2017.

The TFA commits WTO Members to streamlining cross-border trade with estimates showing that full implementation of the TFA could reduce global trade costs by an average of 14.3% (WTO, 2015) with the biggest reductions to be seen in developing countries and LDCs.

Government is cognizant of the benefits of implementing the TFA, and the NDP highlights improvements in trade facilitation measures as a gateway to re-positioning The Gambia as a hub for re-export and transit trade in the ECOWAS region. Reforms have been undertaken to achieve this objective, and The World Bank's Doing Business 2018 Report ranks The Gambia 105th out of 190 economies on the ease of trading across borders, up from 112th in 2017.

This marked improvement is a result of Government's commitment to trade development and further reforms are planned including the migration of the national electronic customs data system from ASYCUDA++ to ASYCUDA World by 2020; the Port Expansion Project; and update of the national quality infrastructure.

Despite these reforms, The Gambia is still faced with a myriad of structural challenges including both hard and soft infrastructure.

3.3.1 Addressing the hard infrastructure (roads, seaport, airport, warehouses)

Roads

Road transport is the main mode for the movement of persons and goods in The Gambia, and the Ministry of Transport, Works and Infrastructure (MOTWI) is the competent policy authority and regulator of the sector. The National Roads Authority (NRA), a Government Agency under the MOTWI is responsible for the construction, maintenance and management of the road network.

The Trans-Gambia corridor which serves as an important economic link connecting the northern and southern parts of The Gambia and Senegal is currently serviced by a ferry crossing, and poor road conditions. This state of affairs is being addressed through the construction of the long awaited Trans-Gambia Bridge, which started in February 2017 almost two decades after the feasibility and design studies for the construction of the bridge were completed.

Once completed, the bridge will reduce transport costs, travel time and customs formalities through the implementation of two joint border posts on the north and south respectively. Furthermore, the bridge will have a toll facility which will generate much needed revenue for the NRA's Road Fund used to finance the country's road maintenance needs.

Construction of the country's primary road network linking both the north and south banks have been completed except for the Laminkoto-Passimus section, which is currently under construction. The challenge now remains for government to develop the secondary and trunk roads that connect farming communities to the main roads and markets, thereby facilitating agricultural commercialisation.

Seaport

The Gambia has one of the deepest ports on the West African coast and has the potential to enhance its operations and make Banjul Port a first port of call and expand its transshipment business. The Port of Banjul is the only maritime port in the country, and is the entry point for the majority of the country's international trade. The River Gambia is navigable from the coast to Georgetown to vessels with a 5m draft and from Georgetown to the border with Senegal to vessels with a draft of 3m.

The Gambia Ports Authority (GPA) which is the sole provider for all port services witnessed a traffic growth of 16.6 percent from 2015 to 2017 whilst its facilities have not improved significantly to keep up with this growth. Challenges affecting the effectiveness of Port operations include a limited berth capacity which makes ship turnaround time very slow as ships wait long time to berth, congestion due to limited space, siltation which limits entrance to the access channel by larger vessels, and a limited ferry fleet. The issues of Port congestion and slow turnaround time have been frequently cited by importers as a costly burden on their operations given the demurrage and detention charges that they incur.

Government is cognizant of the challenges affecting the operations of the port and implementation of the €117.5 million Port Expansion Project will improve its capacity and efficiency. The project includes the rehabilitation of the new Banjul Jetty; procurement of cargo handling equipment; construction of a new container terminal; and capital and maintenance dredging of the access channel to handle larger vessels. Government has been engaging with several development partners to attract concessionary funding for the implementation of these

key priority project. For the medium to long term though, construction of a deep sea port should be considered and the Gambia Ports Authority plans to commission a study in this respect.

Airport

The Gambia is one of the closest African countries to the United States of America and retains its “last point of entry” status into the United States. This means that The Gambia has a comparative advantage in terms of commercial air transport into the United States. Banjul International Airport (BIA) is the only airport in the country, and is 100 percent owned by the Government. The Gambia Civil Aviation Authority (GCAA) is responsible for the operation and management of BIA. Under a concession contract, ground and cargo handling at the airport is carried out by Gambia International Airlines (GIA) – the national carrier whose flight operations were discontinued in 2005.

With the completion of the Airport Improvement Project, BIA now has the capacity to handle more traffic and all aircraft types. With such capacity, the BIA could be marketed as a viable technical stop if supported with line maintenance facilities. The airport is already recognised and used as a technical aerodrome by the United States and offers further opportunities for fuel bunkering.

As capacity at BIA is only optimally utilized during the tourist season from November to April each year, the GCAA provides a waiver on landing and parking fees as incentives to stimulate traffic during the off-peak season. However, this has not yielded any significant results – as only seven out of the fourteen airlines operating into and out of BIA are scheduled air services. There is a need for Government to review its airport tariff and charges, particularly the 15 percent airport transport tax introduced in January 2014 which is applicable to all airlines and travel agencies for ticket sales of flights originating from The Gambia.

Under the EIF Trade Facilitation Project, an ultramodern airport cargo complex was built to address inadequate storage for export products, particularly fish and horticulture produce, as well as attract more airlines serving The Gambia. The cargo complex was inaugurated on 19th February 2018 but it has not been utilized to its maximum capacity to due to lack of proper marketing. The Gambia International Airlines as the operator and manager of the complex need to work with a sufficiently networked partner operator that will turn BIA into a cargo hub.

Warehouses

The concept of a customs bonded warehouse refers to a secured area whereby dutiable imported goods can be stored for a period of time until they are re-exported or released following the payment of import duties and other charges. The Customs and Excise Act of 2010 has provisions regarding bonded warehouses to enhance GRA’s risk management procedures. However, these

provisions are currently underutilized and only a select few importers are using bonded warehouses.

3.3.2 Issues of soft infrastructure (customs clearance, tariffs and non-tariff barriers)

Customs clearance

The 2010 transition of the national electronic customs data system from ASYCUDA 2.7 to ASYCUDA++ has increased efficiency in clearance of goods and fostered transparency in procedures for importers and exporters. However, ASYCUDA++ has not been adopted at all major border entry points (UNCTAD, 2017).

GRA has since secured assistance from the African Development Bank (ADB) to upgrade to ASYCUDA World – the latest version of UNCTAD’s automated system for customs data software. This will enable both the Customs Authorities and traders to handle all transaction procedures online for greater transparency and efficiency. With the acceptance of the World Trade Organisation Trade Facilitation Agreement by the Gambia, there will be need to build capacity at the GRA for the effective implementation of this agreement.

Tariffs

The Gambia started implementing the five-tiered ECOWAS Common External Tariff (CET) on 1st January 2017 after a two-year delay. The tariff classification consists of the following:

- i. essential social commodities at 0%;
- ii. essential commodities, raw materials, and capital goods at 5%;
- iii. intermediate products at 10%;
- iv. consumer goods at 20%; and
- v. specific goods for economic development at 35%.

The ECOWAS customs tariff allows temporary national exceptions to the CET of up to 3% of tariff lines for "sensitive" products until 1st January 2020. In January 2018, The Gambia exercised this exception by reducing the import duty on rice from 10% to 0%. However, the finalization of a national list of exclusions for sensitive products is still pending, and needs to be done as a matter of urgency.

Non-tariff barriers

Government has made significant strides in eliminating or reducing non-tariff barriers which create obstacles to trade. The implementation of the ECOWAS ISRT in 2013 led to a drastic reduction in the number of checkpoints along the transit corridor thus facilitating the movement

of transit goods without unnecessary delays. However, the scheme is yet to be recognized by the neighboring countries to enable Gambian operators to use the scheme beyond our borders. Government will continue to engage neighboring countries on this matter.

In the area of standards and technical requirements, the standards regime is subject to ECOWAS rules on standard harmonization which is based on WTO and ISO/IEC rules. Technical regulations are supposed to be developed by the sectoral regulatory bodies in consultation with The Gambia Standards Bureau. The Food Safety and Quality Authority has already developed a number of technical regulations that are expected to be adopted and published shortly.

3.4 Quality, Standards and Consumer Protection Issues

3.4.1 Issues of TBT and SPS

The Gambia Food Safety and Quality Act, 2011 together with the animal and plant health regimes, provide the main framework for SPS standards-setting and compliance in The Gambia. The Act establishes the Food Safety and Quality Authority (FSQA) with unified responsibilities to ensure the safety of food and feed. The national Sanitary and Phytosanitary Standards (SPS) Committee and the Codex Committee also have the responsibility for the application of the Act and development of measures for animal, plant, and food protection. The Food Safety and Quality Act, 2011 applies to all food products of plant and animal origin destined for human consumption and animal feed whether locally produced or imported.

The FSQA's responsibilities comprise overall government surveillance to ensure compliance with safety and quality requirements for food and feed; inspections, sampling and certification for import and export and promulgation of regulations. The FSQA also serves as the secretariat for the National WTO SPS and Codex Committee as well as Codex Alimentarius contact point and the WTO SPS enquiry point. In the exercise of its mandate, the Authority signed memorandum of understanding with other institutions to carry out certain inspections on its behalf. It has also developed a number of technical regulations based on standards adopted by The Gambia Standards Bureau.

One of the challenges faced by exporters of food related products is the lack of facilities in The Gambia to test for sanitary and phytosanitary standards and other food safety standards. While the EU-funded West African Quality Programme has supported four laboratories to improve testing and acquire international accreditation in different fields, none of them is yet to be accredited partly because they are housed in institutions whose primary mandate has nothing to do with testing. These are the:

- National Agricultural Research Institute laboratory, for aflatoxin testing on groundnuts;
- Fisheries laboratory, for microbiology testing of fish;

- National Health laboratory, for chemical testing of foods; and
- Veterinary laboratory, for microbiology testing of foods of animal origin.

In addition, support has also been provided by the Indian Government to build and equip a laboratory which is expected to be able to meet international standards and best practices.

As it pursues international accreditation efforts, Government will look into the possibility of having a National Reference Laboratory owned and run by The Gambia Standards Bureau, as well as pursue international accreditation through the Bureau and equip it fully to better serve the people. In effect, conformity assessment, which entails inspection, testing and certification, is a role assigned to The Gambia Standards Bureau by its Act and therefore it makes sense for the Bureau to have such capability.

The animal health and plant protection regimes under the direct surveillance of the Plant Protection Unit and the Department of Livestock under the Ministry of Agriculture are obsolete and require modernization. While the Disease Animal Act dates back to 1965, a new Plant Health Protection Bill has been drafted in 2014 and awaiting enactment. Also, the implementing departments appear to be ineffective due to capacity and resource constraints. There is an ECOWAS regulation to improve cooperation in the region and harmonize the rules with respect to food safety, and animal and plant health which needs to be domesticated.

The Government will support the FSQA and its institutional mechanisms as well as continue to promote the competitiveness of national industries and enterprises to ensure compliance to regional and international food safety requirements, in particular the WTO SPS Agreements. Government will also strengthen regional cooperation with ECOWAS in order to adopt and implement ECOWAS Harmonized regulation on quality and Food Safety requirement in the region.

3.4.2 Competition and Consumer Protection issues

The Gambia Competition and Consumer Protection Commission was established in 2008 and mandated to enforce the Competition Act 2007 and administer the Consumer Protection Act 2014, which together aim to promote and enforce fair competition in the Gambian economy, and protect the welfare of consumers of goods and services. The Commission is mandated by the Competition Act 2007 to promote competition in the supply of goods and services by prohibiting collusive agreements and bid rigging, investigating and controlling other types of restrictive agreements, monopoly and merger situations, and promoting understanding of the benefits of competition and related matters. The Consumer Protection Act 2014 mandates the Commission to protect consumers from unfair and misleading conduct, establish Consumer Tribunals and to deal with consumer complaints and connected matters.

Similarly, the Weights and Measures Bureau under MOTIE is mandated to enforce fair competition by ensuring that measuring and weighing instruments meet the required calibration. While the Bureau plays a vital role, its effectiveness has been limited due to capacity and resource constraints. A new Legal Metrology Bill has been drafted whose enactment will help restructure the Bureau to effectively carry out its mandate.

As the new global trade direction is placing more emphasis on e-commerce, the Ministry will support the establishment of a Legal Framework for Single Window for Custom Clearance. In this regard, the Consumer Protection and Competition Acts must incorporate modalities for ensuring fair competition in electronic commerce and online service orientated businesses, especially given the openness of The Gambia's Schedule of commitments and expected signature of the EPA. The Competition Act will therefore be subjected to review to take this and other new issues on board.

The Trade Policy incorporates competition policy within the framework of trade activities and trade negotiations to ensure an even distribution of benefits from policy measures between producers and consumers. Government will focus on an import substitution model, reducing imports of essential commodities and supporting the Private Sector to boost production to counter the trade deficit and ensure lower prices for essential commodities.

There is a clear cut distinction between competition and consumer protection and price controls. Of recent, this line is being blurred with government attempts to regulate prices of basic commodities. While a Price Control Act, 1974 still exists and mandates the Minister of Finance in collaboration with the Minister of Trade to declare and implement price controls (Gambia Trade Policy Review 2018 – WTO Secretariat Report), this practice ceased since 1985. As the Trade Policy reaffirms Government commitment to a liberal trading regime, there is need to repeal the Price Control Act 1974 from the statutes.

Engagements on pricing of basic commodities need to be anchored on positive consultations, and calls for a robust communication strategy between MOTIE, the Competition and Consumer Protection Commission, producers/traders, and consumer Associations among others, to ensure continued availability and affordability of basic commodities and prevent shortages. Also, specific concerns about availability and affordability can be addressed by revising the Essential Commodities Act 2015. It is imperative that the Commission continues to enhance sensitization of the provisions of its Acts in an attempt to deter uncompetitive behavior from individuals and associations and ensure the protection of consumer welfare.

The establishment of a regional Competition Authority would also facilitate the streamlining of competition policy across the ECOWAS region for a more predictable and transparent business environment. The Gambia as host of this important regional body must lead by example through effective trade liberalization and enforcement of a robust competition regime.

3.4.3 Standards and Quality Assurance

The Gambia Standards Bureau Act 2010 provides the main framework for supporting the Gambia Quality Infrastructure System. The Gambia Standard Bureau has made advances in determining and providing relevant standards, with the adoption of international standards. The Bureau has published, as national standards, standards in multiple sectors covering products in Food and Agriculture, Electro-technical, Renewable Energy, Management Systems and Testing standards. It also provides other services in area of conformity assessment and metrology. The Bureau serves as the secretariat of the National TBT Committee and the WTO TBT enquiry point.

A National Technical Regulations Coordinating Committee was established in 2013, which is an inter-agency body set up to ensure that the laws enacted are coherent and consistent and in compliance with international commitments. However, the committee has not been effective due to lack of proper coordination as well as limited resources in delivering their coordination role. The trade Policy will seek to revitalize the committee, and where necessary expand its scope to be able to monitor and report on the operations of regulatory bodies to ensure they are doing their jobs effectively.

The Gambia has consistently been faced with the challenges of a weak national quality infrastructure which makes it difficult to fully realize the benefits of multilateral trading system. In particular, it faces major technical obstacles related to the weak quality framework in accessing the export market. This weakness of the quality related institutions has impeded industrial growth and expansion and has made it difficult for Gambian products to access international markets. Gambian exporters still incur additional cost in the process of having their products tested and certified before exports as testing services have to be sourced outside The Gambia due to lack of accredited laboratories in The Gambia

National regulatory framework, standardization, metrology, accreditation and conformity assessment institutions that make up the National Quality Infrastructure face many challenges that need to be addressed to improve the Gambia's access to export markets of trading partners. The technical requirements, especially for food, are getting stricter by the day. There are four official testing laboratories, none of which has international accreditation.

The Gambia currently does not have a national accreditation body and hence accreditation remains one of the most serious challenges for The Gambia to get its inspection, testing and certification accepted internationally. There are currently no national activities for system or product certification and the requirement to demonstrate evidence of compliance with standards is lacking.

The Government thus formulated the National Quality Policy in 2014 to ensure that goods and services for the domestic and export markets are designed, manufactured and supplied in a

manner that meets international standards. In addition implementation of the Quality Policy will raise quality consciousness among the producers, suppliers and consumers.

Government will effectively implement the Quality Policy to strengthen quality infrastructure as well as enhance the enforcement of quality assurance to ensure that exports meet international quality standards. There is also need to support the establishment of an ultra-modern National Quality Control Center in The Gambia consisting of laboratories to provide testing services relating to chemical, biological, renewable energy, pesticides, construction, and metrology among others.

4 Policy Priority Areas

The Gambia's National Development Plan envisages a vibrant private sector that significantly contributes to economic growth and employment through growth in the contributions of manufacturing, industry and trade. As such the Trade Policy aims to focus on measures that support key productive sectors of the economy; enhance capability for increased market access; address trade facilitation issues; and enhance consumer protection and welfare.

4.1 Support to Productive Sectors of the Economy

For the decade 2002 to 2012, the main drivers of economic growth for the Gambia were the agriculture, fisheries and tourism sectors, and these have shaped the country's industrialisation strategy. However there are opportunities to move into new sectors that have the potential to raise the county's trade and industrialisation capacity. The Trade Strategy and Industrial Policy recommends support to productive sectors anchored on three pillars:

- Strengthening the performance of existing sectors where The Gambia has, and needs to further develop, comparative and competitive advantages;
- Supporting non-traditional sectors where The Gambia could develop a competitive advantage, with implementation of the right policies and strategies; and
- Taking advantage, and deepening, market opportunities in countries that provide The Gambia with preferential market access.

In pursuit of private sector development the Government will work to increase investment in key export sectors; increase credit to the private sector; and streamline the tax code. Government will equally adopt the following sector specific strategies:

Agriculture

- Commercialize Agriculture for increased production and productivity
- Promote value chain development in the sector

- Diversify local production by introducing high value products such as findi, moringa, sesame, honey, cashew and horticulture for the export and domestic markets;
- Address poor farm management practices by enhancing interventions to farmers' associations.

Fisheries

- Promote value chain development in the fisheries sector
- Put in place mechanisms for sustainable and viable exploitation of fisheries

Tourism

- Diversify tourism products through a value chain approach linking the production sector to the tourism industry;
- Promote inclusive tourism

Energy

- Diversify the country's energy mix to reduce the cost affecting the productivity of industries and thereby enhance the growth of businesses;

ICT:

- Harness e-commerce as a means of maximizing possible benefits accruing to businesses;

Manufacturing:

- Develop a package of support measures and incentives to promote and encourage local manufacturing

4.2 Enhancing Capability for Increased Market Access

The Gambia has for many decades enjoyed a competitive advantage in terms of lower tariffs and unilateral market access schemes under the European Union EBA and the US AGOA, as well as regional market access under ECOWAS through its ETLS and other trade-related protocols, and now the AfCFTA which also offers huge market access potential for increased trade. However, The Gambia has over the past faced and continues to face challenges that hinder her ability to take full advantage of these market access opportunities. Supply side constraints including limited production capacity, undiversified products, quality and standard requirements, and insufficient institutional coordination are factors affecting the Gambia in her efforts at exploiting the opportunities in these trading markets.

The need to focus on technology and innovation advances, finance and capacity-building, education and skills development will be important cushions for utilization of the market opportunities. The Government will implement the following strategies:

- Develop capability to improve the utilization of the market access preferences
- Strengthen GIEPA for effective implementation of its mandate

4.3 Addressing Trade Facilitation Issues

Trade facilitation is the simplification and harmonization of international trade procedures to expedite the movement of goods across borders, and reduce trade costs. WTO Members concluded negotiations on a landmark Trade Facilitation Agreement (TFA) in December 2013, which commits Members to streamlining cross-border trade. The Gambia deposited its instrument of acceptance of the TFA on 11th July 2017, and will adopt and implement the following strategies:

Hard Infrastructure

- Develop the Trade Facilitation hard infrastructure to enhance capacity for increased trade

Soft infrastructure

- Enhance capacity to implement the provisions of the WTO Trade Facilitation Agreement.

4.4 Enhancing Consumer Protection and Welfare

Strategies to be adopted and implemented by Government in enhancing consumer protection and welfare include:

- Enhance competition to improve consumer welfare;
- Enhance the national quality infrastructure to meet required standards and safety of consumers.
- Promote the competitiveness of national industries and enterprises to ensure compliance to regional and international food safety requirements;
- Strengthen the national capacity to address TBT and SPS measures

5 Trade Policy coordination mechanism

5.1 Institutional arrangements

The Ministry of Trade, Industry, Regional Integration, and Employment (MOTIE), together with its related agencies, is the principal institution responsible for formulating and coordinating trade policy in The Gambia. However, effective and full implementation of the Policy would require broader inter-agency collaboration and coordination, thus the need for an all-inclusive committee to be put in place.

Probably the most important committee in terms of trade policy coordination has been the National Trade Policy Decision Making Committee (NTPDMC) which used to be the Inter-Institutional Committee for Mainstreaming Trade and Trade-Related Issues (MATTRICOM) that was created by the Ministry of Trade in 2007. This national committee has three sub-committees, namely: the Trade Negotiations Committee (headed by MOTIE), the National Trade Facilitation Committee (headed by GRA) and the Committee on Market Access (headed by GCCD).

However, over recent years, the National Trade Policy Decision Making Committee seems not to have been as active as it was expected. Similarly, the Trade Facilitation Subcommittee which is one of the most important subcommittees has not been as vibrant as expected. While a National Business Council has recently been formed, it is not expected to play the role of the National Trade Policy Decision Making Committee. The Council provides a platform for high level interaction between Government and private sector on all issues affecting the relation between the two parties.

For this reason, and to ensure a successful implementation of this Trade Policy therefore, the NTPDMC, will be revitalised and incentivised to effectively carry out its coordination role. It is expected that representation from institutions that are members of the committee will come from the senior management cadre to ensure appropriate decisions are taken, and that such decisions filter down and effectively implemented.

5.2 Implementation Action Plan/Matrix

A policy is as good as it is implemented. The Policy has identified a range of opportunities and challenges that need to be addressed through the proposed strategies and other relevant sector policies and strategies. It is incumbent on all relevant sectors to own up and implement their strategies with a view to positively impacting on the country's capacity and ability to trade. In order to facilitate the coordination and implementation of this Trade Policy, it is accompanied with the following Implementation Action Plan.

The plan proposes for each expected output, key strategies in response to the challenges to be addressed; priority interventions or activities that would lead to the effective implementation of the proposed strategy; and key institutions whose participation is essential to get the

interventions actualized. The Action Plan is also designed to cater for the implementation of the Industrial Policy and Trade Strategy as its covers the key strategies contained therein.

Expected Outputs	Strategies	Priority interventions or activities	Responsible entity
Key sectors of the economy supported to improve export performance	Commercialize Agriculture for increased production and productivity	<ul style="list-style-type: none"> ➤ Promote PPPs in the sector that could yield rapid returns to the economy; ➤ Adopt a coherent agricultural logistics strategy that supports the agriculture and fisheries sectors; ➤ Increase investments in irrigation schemes to support farmers in boosting production for food self-sufficiency in rice and vegetables; ➤ Promote establishment of light scale milling industries for agricultural produce (rice and other cereals) across the country ➤ Adopt a comprehensive Land Policy that addresses usage of agricultural land; 	MOA, GIEPA, DPPP-MoFEA, MOLRG, MOTIE, GCCI
	Promote value chain development in the agriculture sector	<ul style="list-style-type: none"> ➤ Adopt and implement a one-region one-commodity policy in the production of agricultural commodities to improve production and quality; ➤ Encourage and promote the establishment of processing facilities in-country as opposed to exporting raw cashew and groundnuts for processing abroad; ➤ Promote participation of women and youth in development of out-growers schemes in poultry and horticulture ➤ Support the implementation of the Aflatoxin mitigation programme 	MOA, MOTIE, GIEPA, MOFEA, NFSPMC (GGC), GCCI
	Diversify local production by introducing high value products such as findi, moringa, sesame, honey, cashew and horticulture for the export and domestic markets	<ul style="list-style-type: none"> ➤ Develop sector strategies for findi, moringa and honey ➤ Implement the sector strategies for cashew and sesame ➤ Create market linkages for agricultural products to support the diversification 	MOA, MOTIE
	Address poor farm management practices by enhancing interventions to farmers' associations	<ul style="list-style-type: none"> ➤ Enhance technical expertise in research in improving and distributing quality seeds ➤ Provide environment-friendly technologies to address poor farming practices and produce quality for the market ➤ Popularize the use of farmer field schools. ➤ Support the establishment and strengthening of agricultural cooperative societies. 	MOA, MOTIE

<p>Put in place mechanisms for sustainable and viable exploitation of fisheries resources</p>	<ul style="list-style-type: none"> ➤ Popularize the use of fisheries management plans by communities for a sustainable use and management of fisheries resources. ➤ Encourage more industrial fishermen to land their catch in-country; ➤ Offer better incentives in the operation of the Fisheries Jetty to enhance bunkering opportunities; ➤ Put in place a mechanism to address rising cost of fuels and fishing materials and limited access to finance for fisheries operators; ➤ Promote investment in the development of Aquaculture 	<p>MOFWR, DoF, MOFEA, GPA, GIEPA, MOTIE</p>
<p>Promote value chain development in the fisheries sector</p>	<ul style="list-style-type: none"> ➤ Encourage and promote the establishment of processing units for value addition and more employment opportunities ➤ Promote youth and women participation in the fisheries value chain through services in sanitation, logistics, marketing and transport to support landing and export activities; ➤ Adopt a cold chain strategy and implemented through partnerships with private entities to boost the quality of exports and create value adding employment along the chain; 	<p>MOFWR, DoF, MOYS, OVP, Women’s Bureau, FSQA, MOTIE, GIEPA</p>
<p>Diversify tourism products through a value chain approach</p>	<ul style="list-style-type: none"> ➤ Encourage usage of local produce in the tourism sector through youth and women participation in the value chain ➤ Develop infrastructure and promote cultural and historic sites; ➤ Promote the development of performance arts and conference tourism 	<p>MOTC, GTBoard, NCAC, MOA, MOTIE</p>
<p>Promote inclusive tourism</p>	<ul style="list-style-type: none"> ➤ Promote tourism offerings including eco-tourism ➤ Supports skills development in the sector to enhance service delivery. 	<p>MOTC, GTBoard, GTHI, MOTIE</p>
<p>Diversify the country’s energy mix to reduce the cost affecting the productivity of industries and thereby enhance the growth of businesses</p>	<ul style="list-style-type: none"> ➤ Review the policy and regulatory environment to attract investments into the sector; ➤ Promote sustainable energy solutions with emphasis on the use of clean energy technologies such as renewable energy production to support national development ➤ Restructure/unbundle NAWEC to improve efficiency in its service delivery ➤ Promote cross border trade in energy to enhance availability and affordability. 	<p>MOE, NAWEC, PURA, MOFEA, MOTIE, GIEPA</p>

	Harness e-commerce as a means of maximizing possible benefits accruing to businesses	<ul style="list-style-type: none"> ➤ Conduct eTrade readiness assessment to identify the capacity development needs to support businesses. ➤ Strengthen the ICT infrastructure to handle the growing demand of the use of information technology by businesses; ➤ Improve the regulatory environment and the ecosystem for ICT and ICT-related sectors to flourish; ➤ Ensure a robust regulatory framework to address issues of cyber security and tackle risks associated to e-commerce. 	MOICI, PURA, MOTIE, DPPP-MOFEA
	Develop a package of support measures and incentives to promote and encourage local manufacturing	<ul style="list-style-type: none"> ➤ Address the high cost of logistics related to infrastructure deficit, especially for energy and telecommunications, ➤ Address the complexity of the tax system by deepening tax reforms and streamline and reduce tax rates ➤ Enhance the efficiency of the financial sector and lower interest rates to promote and facilitate access to affordable financing ➤ Enhance training and skills development to create a critical mass of skilled workforce ➤ Ensure availability of land for industrial development purposes within specially designated zones ➤ Apply tax and non-tax measures that limit importation of certain products in support of local products 	MOE, MOICI, MOFEA, CBG, MOHERST, MORGL, GRA, MOTIE, GIEPA, GCCI
Capacity for market access enhanced	Develop capability to improve the utilization of the market access preferences	<ul style="list-style-type: none"> ➤ Improve trade and investment negotiations through enhanced capacity building ➤ Reinforce engagement with the ECOWAS Commission and concerned Member States (Senegal, Guinea Bissau and Mali) on the effective implementation of the ETLS and ISRT protocols to facilitate trade for Gambian businesses; ➤ Engage the national stakeholders for the effective implementation of ECOWAS protocols on ISRT ➤ Strengthen cooperation with the AUC-AfCFTA Secretariat and technical partners to build necessary capacity of the Gambian private sector; ➤ Engage and negotiate better terms with countries that offer duty free market access for Gambian businesses in accessing those markets (issues of standards, rules of origin). 	MOTIE, MOFA, GRA, MOI, GIEPA, GCCI, AGM

		<ul style="list-style-type: none"> ➤ Conduct an assessment of the available market access preferences product by product to determine comparable advantages and build a database showing the MFN and preference rates for our top exporting products to each preference country ➤ Review the EPA implementation roadmap and update it to include strategies to access the EU market beyond EBA and in anticipation of the signing of the EPA ➤ Develop an AGOA National utilization Strategy which will include strategies to attract US investors beyond AGOA, and initiate the re-activation of the textile visa arrangement ➤ Formulate national value addition plan and strategies to enable the sourcing of raw materials from the region for value addition purposes within the framework of AGOA and AfCFTA market access. ➤ Continue sensitising the Gambian producers and manufacturers to take advantage of the market access openings and opportunities negotiated and obtained by the government. 	
	Strengthen GIEPA for effective implementation of its mandate	<ul style="list-style-type: none"> ➤ Enhance business development and support services to small and medium enterprises ➤ Centralize all investment promotion activities within GIEPA for improved efficiency ➤ Operationalize the MSME Fund to support small businesses ➤ Develop a framework on commercial diplomacy in strategic Embassies to promote investments and made in Gambia products. ➤ Assess and review the effectiveness of the investment incentive regime. ➤ Undertake Investment incentives policy reforms. 	GIEPA, OP, MOTIE, MOFA, MOFEA
Trade facilitation Systems strengthened	Develop the Trade Facilitation hard infrastructure to enhance capacity for increased trade	<ul style="list-style-type: none"> ➤ Conduct resource mobilisation to implement ports expansion projects. (deepen access channel, rehabilitate and strengthen piers, and expand container storage yard) ➤ Promote investment and partnerships for the establishment of airlines in the Gambia. ➤ Seek sufficiently networked operator in the operation of the new Cargo Complex. ➤ Promote use of BIA as a technical stop aerodrome as well as a fuel bunkering facility. ➤ Invest in a network of feeder roads to allow the whole country to feed into a multimodal 	MOFEA, GPA, GCAA, GIA, MOTWI, NRA, MOTIE

		transport system that uses the river as the main artery.	
	Enhance national capacity to implement the provisions of the WTO Trade Facilitation Agreement	<ul style="list-style-type: none"> ➤ Assess and strengthen the capacity of GRA to implement the TFA. ➤ Establish the Single Window Custom Clearance system to increase efficiency in clearance of goods. ➤ Implement reforms to migrate the national electronic customs data system from ASYCUDA++ to ASYCUDA World. 	MOTIE and its TFC, GRA, MOFEA
Consumer Protection and Welfare enhanced	Enhance competition to improve consumer welfare	<ul style="list-style-type: none"> ➤ Review the Competition Act 2007 and Consumer Protection Act 2014 to cater for issues of e-commerce and other emerging issues ➤ Repeal the Price Control Act. of 1974 ➤ Review the Essential Commodities Act to address issues of affordability and availability ➤ Strengthen the Weights and Measures Bureau ➤ Enact the draft Legal Metrology Bill 	MOTIE, GCCPC, MOJ, TGSB, W&MB
	Enhance the national quality infrastructure to meet required standards and safety of consumers	<ul style="list-style-type: none"> ➤ Strengthen the capacity of The Gambia Standards Bureau to undertake conformity assessment as mandated by its Act; ➤ Establish an ultra-modern National Quality Control Center in The Gambia consisting of laboratories to provide testing services relating to chemical, biological, renewable energy, pesticides, construction, metrology, etc. 	TGSB, MOTIE, FSQA, PURA, NARI-MOA, DoF-MOFWR, MOHSW
	Promote the competitiveness of national industries and enterprises to ensure compliance to regional and international standard requirements	<ul style="list-style-type: none"> ➤ Encourage regulatory agencies to develop appropriate technical regulations based on Gambia and International Standards. ➤ Sensitize producers and exporters on the existence of standards to support production and marketing ➤ Promote capacity building of enterprises for HACCP 	FSQA, PURA, TGSB, MOTIE, GCCI
	Strengthen the national capacity to address TBT and SPS measures	<ul style="list-style-type: none"> ➤ Modernize the animal health regime by reviewing the Disease Animal Act of 1965 ➤ Modernize the plant protection regime by enacting the Plant Health Protection Bill drafted since 2014 ➤ Strengthen the Plant Protection Unit, Department of Livestock and Horticulture Technical Services to fully implement their mandates; 	TGSB, PPU, DoL & HTS-MOA, FSQA, MOTIE, DoF

		<ul style="list-style-type: none"> ➤ Revitalize the National Technical Regulations Coordinating Committee, ➤ Implement ECOWAS Harmonized regulation on quality and Food Safety. ➤ Strengthen capacity of the DoF, DoA, FSQA to ensure compliance to sanitary requirements 	
Trade Policy Coordination mechanism strengthened	Revitalize the Trade Policy Coordination Mechanism	<ul style="list-style-type: none"> ➤ Reconstitute membership of the Trade Policy Decision Making Committee. ➤ Create incentives for the committee members to ensure high level and regular attendance. ➤ Build the capacity of committee members on Trade related issues 	MOTIE