The African Cocoa Industry and the Chinese Tariff Exemption

Does the Chinese tariff exemption, which came into force on 1 May 2026, present genuine opportunities for African cocoa-producing economies? A nuanced assessment is required when analysing Chinese imports of cocoa, its derivatives, and chocolate between 2004 and 2024.

While Africa supplies over 56% of the direct and indirect inputs used by leading chocolate exporters to China, it is almost entirely absent from direct exports of processed products. Added value is captured by Asian processing platforms and major European chocolatiers. The tariff exemption does not alter this: whilst it removes a custom barrier, it does not address the structural deficiencies (*e.g.* industrial pressing capacity, Chinese sanitary certification and logistics) that prevent African exporters from accessing the Chinese market as suppliers of processed products. This is further compounded by a deliberate shift in Chinese demand towards fine-flavoured cocoa from Latin America and the Pacific, which neither Côte d'Ivoire nor Ghana produce.

The risk is therefore of becoming entrenched in primary-commodity specialisation rather than transcending it.

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In a note entitled L'Afrique, la Chine et le tarif zéro: un geste diplomatique à l'aune des données, we argued that the only sector in which the Chinese tariff exemption created genuine opportunities for processed African products was that of cocoa and its derivatives. The European market levies a 30% tariff on chocolate, whereas the Chinese market now levies none whatsoever. For an African processor seeking to diversify its outlets, this makes the Chinese market comparatively attractive, even for modest volumes. However, we added that non-tariff barriers constitute an obstacle: certification of processed foodstuffs by Chinese customs is demanding, entry costs to Chinese distribution platforms are high, and competition from a rapidly expanding Chinese chocolate industry is fierce. Whilst the tariff signal is necessary, it risks being insufficient, particularly as China diversifies its suppliers.

First, let us trace the evolution of Chinese imports of cocoa and cocoa preparations between 1995 and 2024 (see Figure 1). Data was obtained from the UNCTAD online database[1] and categories 072 and 073 of the SITC classification were aggregated. The import of these products is a recent phenomenon which accelerated from 2009 onwards. Between that year and 2024, the value of imports in current US dollars increased fivefold and China's share of world trade in these products doubled, rising from 0.8% to 1.6%.

Figure 1.– Chinese imports of cocoa and cocoa preparations (1995–2024)



According to the FAO online database, over the twenty years of the 2004–2024 period, cocoa bean production came from Africa (69%), Latin America (17%), and Asia (13%). However, the importance of individual producing countries varies according to their involvement in marketing and processing these beans, and even manufacturing chocolate. This is why China does not adopt a uniform approach towards its supplier countries.

For the remainder of this study, we will use data extracted from the Comtrade database for the six categories grouped under HS Chapter 18 (see Table 1). To examine trade trends, we will generally use the same seven dates as in the aforementioned note (2004, 2007, 2009, 2012, 2014, 2018 and 2024). These correspond to the years before successive waves of tariff exemptions were granted by China to the least developed African countries. This was prior to the 1st May 2026 exemption covering 53 African countries, regardless of their level of development, provided they do not recognise Taiwan[2].

1 In this particular case, we opted for the UNCTAD database, as it allowed the required data to be extracted more easily. For the rest of this note, however, we generally prefer the more detailed Comtrade database, which uses the Harmonised System classification.

2 Due to the timescales of statistical updates, the most recent available data is from 2024.

Table 1.– Cocoa and cocoa preparations in the Harmonised System (HS 18)

HS Code	Full title	Short title
1801	Cocoa beans, whole or broken, raw or roasted	Beans
1802	Cocoa shells, husks, skins and other cocoa waste	Waste
1803	Cocoa paste, whether or not defatted	Paste
1804	Cocoa butter, fat and oil	Butter
1805	Cocoa powder, not containing added sugar or other sweetening matter	Powder
1806	Chocolate and other food preparations containing cocoa	Chocolate

The value and volume of products recorded under the chapter entitled "Cocoa and cocoa preparations" (HS 18) have evolved considerably in China's trade. Even though China has moved from 30th to 15th among importers of this chapter between 2004 and 2024, it remains a minor player in the global cocoa and cocoa preparations trade. This suggests that African countries will only benefit marginally from the tariff exemption applicable to products in this chapter and that major producing and chocolate-exporting countries will continue to be favoured over China as outlets for bean production, at least for the time being.

1. CHINESE IMPORTS BY PRODUCT

The structure of Chinese imports reveals the evolution of the Chinese supply chain (see Table 2). Finished chocolate imports (HS 1806) rose from US$61 million in 2004 to US$655 million in 2024, accounting for almost half of all imports during this period. This reflects a preference for foreign brands and recipes that the local industry cannot fully replicate. Even more remarkably, the proportion of raw bean imports fell from 24% to 5% of the total value, while paste, powder and butter — that is, industrial inputs for confectionery — increased in importance, reflecting the development of the Chinese chocolate industry. The "Waste" category (HS 1802) is not included in Table 2 as the value of Chinese imports thereof is negligible.

Tableau 2. – Structure par produits des importations chinoises

Year	Beans – 1801	Paste – 1803	Butter – 1804	Powder – 1805	Chocolate – 1806
2004	24%	11%	8%	10%	45%
2007	35%	10%	10%	8%	37%
2009	20%	17%	10%	15%	38%
2012	14%	13%	6%	22%	44%
2014	12%	11%	11%	10%	56%
2018	9%	10%	10%	13%	57%
2024	5%	12%	14%	20%	49%

The "Waste" category (HS 1802) is not included in this table as the value of Chinese imports in this category is negligible. Consequently, the figures in any given row may not add up to 100%.

A comparison of the compound annual growth rates (CAGRs) between 2004 and 2024 reveals contrasting trends in the value and volume CAGRs (see Table 3). This is particularly evident for cocoa beans, where the difference between the value CAGR of +4.0% per annum and the volume CAGR of −2.9% per annum is significant. Although China imported fewer beans by weight in 2024 than in 2004, it paid considerably more for them owing to the African crisis of 2023–2024, which saw lower yields in 2023 followed by rising prices in 2024.

The downward trend in the volume of cocoa bean imports suggests a shift in China's sourcing strategy, with an increasing amount of primary processing being subcontracted out. Table 4 shows the ratio of volumes of imported intermediate products (paste, butter and powder) to volumes of imported beans, and provides an indication of the extent to which primary processing of cocoa

imported by China is subcontracted. Not only do we observe an increase in consumption, but also a significant externalisation of primary processing to supplier countries. In other words, China appears to be seeking to develop a chocolate industry at a lower cost.

Table 3. – Compound annual growth rates (CAGRs) of Chinese imports, 2004–2024

Product	By value	By volume
Beans	+4.0 %/yr	−2.9 %/yr
Paste	+13.0 %/yr	+5.4 %/yr
Butter	+15.2 %/yr	+8.4 %/yr
Powder	+15.9 %/yr	+11.4 %/yr
Chocolate	+12.6 %/yr	+9.1 %/yr

Table 4. – Ratio of Chinese bean imports relative to semi-processed products

Year	Beans tonnes	Intermediate products tonnes	Ratio Intermediate products / Beans
2004	19,849	17,802	0.9
2007	39,477	27,810	0.7
2009	21,044	34,492	1.6
2012	33,696	58,444	1.7
2014	38,301	70,253	1.8
2018	32,552	86,577	2.7
2024	11,069	97,931	8.8

2. SUPPLIER COUNTRIES FOR COCOA BEANS

Identifying China's supplier countries is a particularly delicate process. For raw materials such as beans and waste, the producing countries are easily identifiable, since cocoa beans only grow between latitudes 20° north and south. However, traceability of Chinese imports becomes far more uncertain when supplier countries re-export their imports, whether they are producers, such as Togo, or traders, such as the Netherlands. To simplify the approach, we will focus on the year 2024, when a full tariff exemption was announced for Africa's least developed countries (LDCs).

The picture that emerges from Table 5 is rather striking. First, we note the presence of non-producing countries (the Netherlands, the United States, Belgium and Italy) that account for relatively small quantities at fairly high prices (four to six times the average). The most plausible hypothesis is that these represent niche purchases, such as premium, processed, sorted, certified or specialist-use cocoa, whose unit prices have been inflated by traders' commissions, as well as by freight and insurance costs for small quantities.

Equally striking is the position of Africa's producing countries. Although Africa remains the leading supplier of raw beans to China in terms of both quantity and value, the two main producing countries, Côte d'Ivoire and Ghana, have been relegated to sixth and fifth place respectively. They now supply China with just 1.2% and 1.3% of its imports by value and volume respectively. However, this collapse cannot be explained solely by the 2023–2024 cocoa crisis affecting the whole of West Africa, since Togo, a small producing country, rose to second place by volume and third by value of beans imported by China in 2024. The poor harvest can be attributed to adverse weather conditions and severe viral attacks (swollen shoot) and brown rot on ageing plantations. Togolese plantations located on the border with Ghana's Volta and Oti producing regions face the same vulnerabilities.

Table 5.– Chinese imports of cocoa beans (2024)

Declared origin	Value (US$)	Value (% of total)	Weight (kg)	Weight (% of total)	Price (US$/kg)	**World rank**
Ecuador	20,793,156	28.7%	2,565,822	23.2%	8.10	4th
Papua New Guinea	20,712,534	28.6%	3,465,061	31.3%	5.98	14th
Togo	**19,786,904**	**27.4%**	**3,207,391**	**29.0%**	**6.17**	**19th**
Guinea	6,195,250	8.6%	801,624	7.2%	7.73	20th
Ghana	3,594,596	5.0%	812,644	7.3%	4.42	3th
Côte d'Ivoire	475,173	0.7%	100,123	0.9%	4.75	1st
Nigeria	358,032	0.5%	46,852	0.4%	7.64	5th
Thailand	194,396	0.3%	38,000	0.3%	5.12	49th
Madagascar	102,302	0.1%	13,540	0.1%	7.56	18th
Tanzania	45,406	0.1%	8,040	0.1%	5.65	19th
Uganda	42,521	0.1%	6,326	0.1%	6.72	13th
Malaisya	14,970	0.0%	1,237	0.0%	12.10	40th
Netherlands	**6,616**	**0.0%**	**231**	**0.0%**	**28.64**	**X**
Viet Nam	5,950	0.0%	400	0.0%	14.88	30th
Dominican Rep.	4,621	0.0%	980	0.0%	4.72	10th
Panama	3,819	0.0%	501	0.0%	7.62	33th
Peru	2,129	0.0%	200	0.0%	10.65	8th
Bolivia	965	0.0%	105	0.0%	9.19	25th
Cameroon	531	0.0%	10	0.0%	53.10	6th
United States	**501**	**0.0%**	**15**	**0.0%**	**33.40**	**X**
Belgium	**268**	**0.0%**	**10**	**0.0%**	**26.80**	**X**
Italy	**84**	**0.0%**	**2**	**0.0%**	**42.00**	**X**
Total	73 340 724	100.0%	11 069 114	100.0%	6.54	—

According to the FAO's online database, Togo was the 18th largest producer of cocoa beans in 2023, with a production of 20,000 tonnes. Meanwhile, Côte d'Ivoire (1,822,441 tonnes) and Ghana (653,700 tonnes) held the top two spots[3]. Samuel Ofusu-Ampofo, Director of the Ghana Cocoa Board (COCOBOD), provides an explanation for this situation in his statements, denouncing the significant amount of cocoa being smuggled from Ghana into Togo[4]. If this smuggling is evidence of the scale of the problem, we must put forward a hypothesis to explain it. Since 2015, Togo has enjoyed preferential treatment like other least developed countries (LDCs) that have signed an agreement with Peking, which exempts them from customs duties on 98% of tariff lines, including cocoa beans.

This provision was renewed in 2022 for Togo and other LDCs that had "exchanged a letter".[5] It followed Xi Jinping's announcement at the Forum on China-Africa Cooperation (FOCAC) summit in Dakar in November 2021 of Peking's intention to increase its imports of agricultural products from Africa while broadening its range of suppliers to secure its supplies. However, while Togo holds LDC status, Ghana and Côte d'Ivoire do not[6]. This difference constitutes a strong incentive

3 As the cocoa campaign starts at the end of one year and exports take place the following year, the relevant figure for explaining 2024 sales is 2023 production.

4 Cocoa production drops drastically in the Volta and Oti regions – COCOBOD, 16 November 2025. Comtrade data appears to confirm this statement, indicating that Togo exported over 22,000 tonnes of beans in 2024, a figure that is roughly 10% above its estimated production capacity, regardless of any margin of recording error. Furthermore, Togo has a fledgling chocolate industry that diverts some of the available beans.

5 国务院关税税则委员会关于给予最不发达国家 98%税目产品零关税待遇的公告 of 15 December 2021; this document lists in an annex the exempted products (附件 98%税目产品特惠税率表). All the measures adopted in 2021 are consolidated under the title 国务院关税税则委员会关于 2022 年关税调整方案的通知.

6 Togo, an LDC, completed the "exchange of letters" procedure in 2015, and its exemption was confirmed in 2022.

enough for traders, whether African or Chinese, to engage in business with Togo, thereby enjoying a customs duty exemption upon entry of their beans into China. This is in contrast to beans exported from Ghana and Côte d'Ivoire[7].

The new competition for West Africa, created by Ecuador and Papua New Guinea, is undoubtedly explained by the desire for supplier diversification. While this assertion is plausible, it only offers a circumstantial explanation for this choice, namely the West African cocoa crisis. However, other factors suggest a structural reorientation of Chinese imports.

The global market distinguishes between two main types of cocoa beans: 'fine' or 'flavour' beans, and 'bulk' or ordinary beans. Latin America is the leading exporter of fine cocoa, accounting for 90% of global exports in this category. Ecuador, the Dominican Republic and Peru, all of which are present in Table 5, are its three leading exporters by volume. Papua New Guinea is also recognised by the International Cocoa Organization (ICCO) as one of 23 countries producing high-value fine and flavour cocoa.[8] Thus, these two countries occupy a qualitative niche that Côte d'Ivoire and Ghana, which supply bulk cocoa, cannot fill. In other words, the success of Ecuador and Papua New Guinea is relevant to the Chinese chocolate industry's move upmarket.

This relevance is confirmed by the opportunism of economic agreements. The free-trade agreement signed between Ecuador and China will allow preferential rates on 99% of Ecuador's current exports to China. This includes cocoa, for which customs duties will be reduced to zero once the agreement comes into force. Regarding Papua New Guinea, new agreements were signed during the visit of Chinese Foreign Minister Wang Yi in April 2024 to improve that country's access to the Chinese market, particularly for cocoa beans. China thus expressed its appreciation of Papua New Guinea's commitment to the "one China principle". According to available information, the link between the reaffirmation of this principle and the opening of preferential access to the Chinese market for Papua New Guinea's cocoa beans was explicitly stated at the signing of the April 2024 agreement.[9]

Chinese bean purchases are driven by two incentives: qualitative, in the form of purchases of fine cocoa, and geographical, in the form of Africa's downgrading. Therefore, African cocoa-producing countries have little hope that the tariff exemption will encourage them to renew their ageing plantations and thereby increase bulk cocoa production. Could a shift towards intermediate products compensate for this?

3. SUPPLIER COUNTRIES FOR INTERMEDIATE PRODUCTS

During periods of high price volatility, such as in 2023–2024, the value and volume of traded goods can provide a different picture of trade flows. In such circumstances, changes in the value of traded goods reflect price inflation rather than actual sourcing choices. This is why, when examining the role played by intermediate products (such as paste, butter and powder), we shall favour an analysis by volume. Furthermore, since the African countries involved in exporting these products are not

7 Originally, eligibility for the benefits granted to LDCs was not automatic. Each potentially eligible African country had to sign a designated "exchange of letters" (**换文**) to benefit from them. However, the decision announced in September 2024 clarifies that this procedure will be abolished with effect from 1 December of that year (**国务院关税税则委员会发布公告给予最不发达国家** 100%**税目产品零关税待遇**).

8 See Fine Flavour Cocoa on the International Cocoa Organization (ICCO) website.

9 Carolyn Blacklock, "Australia and China Are Making the Same Mistake in Papua New Guinea", *The Diplomat*, 18 June 2024.

LDCs, an analysis accounting for tariff waves is unnecessary. Instead, we will observe a somewhat extended but continuous period (2015–2024).

For those who are new to the cocoa bean processing industry, including the author of this note, let us recall that cocoa is processed in two sequential industrial stages. The first stage involves grinding the beans to produce paste (HS 1803), for which fairly simple equipment is required. The second stage involves pressing the paste to extract cocoa butter (HS 1804), along with a solid residue that is ground into powder (HS 1805). This stage requires heavy industrial presses. The specialisation of countries, as revealed by their exports, informs us of their position in the value chain.

As shown in Table 6, cocoa paste is the only intermediate product for which Africa plays a significant role in Chinese supplies. Its share varies between 29% and 48%, depending on the year, with no clear linear trend emerging. The two main suppliers are Ghana and Côte d'Ivoire, which is unsurprising given their cocoa bean production. Between 2015 and 2024, Ghana accounted for 51% of African exports of cocoa paste to China; the sharp decline in 2024 (-48%) was primarily due to the crisis in 2023. Côte d'Ivoire is also a regular supplier, accounting for 44% of African cocoa paste exports to China between 2015 and 2024, but it shows a downward trend. Nigeria and Cameroon have a marginal presence, accounting for 3% and 2% respectively. Overall, the picture that emerges is one of a slow erosion in favour of Asian countries (see below).

Table 6.– Africa's share of Chinese supplies of intermediate products

Produit	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Paste (HS 1803)	29%	25%	41%	48%	34%	41%	33%	30%	32%	29%
Butter (HS 1804)	0%	0%	0%	3%	0%	0%	0%	0%	0%	1%
Powder (HS 1805)	7%	4%	7%	10%	6%	6%	7%	8%	6%	5%

Africa is not included on the list of direct cocoa butter suppliers to China. Its share never exceeds 3% between 2015 and 2024. This is because African countries have not developed the industrial capacity to extract cocoa butter for export to China. Africa's share of the cocoa powder market is also low. By 2024, Ghana was virtually the only African supplier of cocoa powder to China, with Côte d'Ivoire having practically disappeared from this market. This structural weakness can be explained by two factors. Firstly, African countries mainly export raw beans or paste with limited pressing capacity. Secondly, the powder market towards China is dominated by Asian suppliers who have the logistics and industrial certifications that African exporters struggle to achieve.

Table 7 clearly illustrates the important role played by three Asian countries (Indonesia, Malaysia and Singapore) in supplying China with intermediate products. Between 2015 and 2024, these three countries produced an average of more than half (55%) of the cocoa paste, almost all (99%) of the cocoa butter, and more than three quarters (78%) of the cocoa powder destined for China. Where do the raw materials (beans and waste) processed by these countries originate from?

Table 7.– Share of the three Asian countries in Chinese supplies of intermediate products

Product	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Paste (HS 1803)	53%	59%	53%	43%	58%	50%	58%	60%	57%	59%
Butter (HS 1804)	99%	99%	99%	96%	99%	99%	98%	99%	99%	97%
Powder (HS 1805)	74%	77%	77%	73%	79%	80%	82%	83%	85%	78%

These three countries have rather different profiles. According to the FAO, Indonesia is the world's leading cocoa producer outside Africa, with an average annual bean production of 663,000 tonnes

between 2015 and 2024. Its exports of intermediate products to China therefore reflect the processing of locally sourced raw materials. Since 2017, Indonesia has also been importing cocoa beans, shells, husks and other waste in order to feed industrial capacity that exceeds local production. The majority of these imports (51.5% of beans and 37.7% of waste) originate from Africa (see Table 8).

Table 8.– Imports from Africa by the three Asian countries (averages for the 2015–2024 period))

Products	Indonesia	Malaysia	Singapore
Beans (HS 1801)	51,5%	70,4%	68,4%
Waste (HS 1802)	37,7%	20,8%	0,0%
Paste (HS 1803)	31,3%	14,2%	17,3%
Butter (HS 1804)	0,1%	0,3%	0,8%
Powder (HS 1805)	0,0%	0,6%	0,6%

Malaysia's profile is very different from Indonesia's. It has very limited bean production, which is insufficient to cover its industrial needs. It therefore imports large quantities of beans from abroad, 70.4% of which were harvested in Africa between 2015 and 2024. Malaysia also imports waste (20.8%) and cocoa paste (14.2%) from Africa. Consequently, Malaysia appears as a conduit through which African raw materials reach China in the form of processed cocoa butter. Singapore produces no cocoa. The city-state redistributes imported processed products, notably paste and butter of Malaysian origin, to its clients, including China. Singapore also possesses its own industrial grinding capacity, enabling it to produce powder locally from imported raw beans.

Major companies from Singapore (Olam) and Malaysia (Guan Chong) have invested in bean-grinding units in Côte d'Ivoire and Ghana. They import the extracted paste from these countries to their home countries. Although Indonesia has not invested heavily in Africa, it does import African beans for local processing, which has encouraged international groups such as Cargill and Olam to invest in Indonesian grinders. Everything conspires to render Africa's presence invisible. The continent continues to supply Asian processing platforms with large quantities of raw beans. Therefore, the fundamental difference between the trajectories of Africa and Asia does not lie in the availability of the raw material, but in the location of the value added by processing. Africa exports beans, while Asia exports products made from those same beans. This represents a shift in the industrial location of cocoa processing, not its geographical origins.

This reorganisation is underpinned by three factors. The first is circumstantial: the 2023–24 crisis, which reduced African supplies and accelerated an existing shift. The second factor is structural: Malaysia, Indonesia and Singapore have industrial processing capacity, certifications, logistics and established commercial relationships, which African exporters of processed products do not yet benefit from. Finally, there is a geopolitical factor. China's bilateral agreements with Ecuador and Papua New Guinea are facilitating diversification at Africa's expense in order to meet the growing demand of the Chinese premium chocolate market.

4. SUPPLIER COUNTRIES FOR CHOCOLATE

Imports of chocolate (HS 1806) to China rose from 65,600 tonnes in 2015 to a peak of 143,800 tonnes in 2021, before stabilising at around 93,000–99,000 tonnes between 2022 and 2024. Overall, the cumulative volume reached 908,600 tonnes, worth US$5.1 billion, giving an average price of US$5.63 per kilogramme across all origins.

Table 9.– Chinese imports of chocolate (HS 1806), 2015–2024 cumulative

Country	Volume			Value			Price	Rank
	tonnes	share	rank	US$1,000	share	rank	US$/kg	gap
Russia	207,159	22.8%	1	528,735	10.3%	3	2.55	−2
Italy	126,263	13.9%	2	1,082,835	21.2%	1	8.58	+1
Belgium	98,792	10.9%	3	648,474	12.7%	2	6.56	+1
Malaysia	77,731	8.6%	4	354,485	6.9%	5	4.56	−1
Singapore	58,285	6.4%	5	182,672	3.6%	9	3.13	−4
United States	42,325	4.7%	6	335,513	6.6%	6	7.93	0
Switzerland	39,308	4.3%	7	380,610	7.4%	4	9.68	+3
Germany	36,314	4.0%	8	301,186	5.9%	7	8.29	+1
Indonesia	30,437	3.3%	9	39,826	0.8%	18	1.31	−9
France	25,967	2.9%	10	215,067	4.2%	8	8.28	+2
Thailand	19,216	2.1%	11	25,136	0.5%	22	1.31	−11
Turkey	18,579	2.0%	12	98,813	1.9%	13	5.32	−1
…	…	…	…	…	…	…	…	…
Total (overall)	908,589	100%	—	5,118,746	100.0%	—	5.63	—

The difference between a country's volume and value ranks is a direct indicator of product quality. A positive gap (*i.e.*, a higher volume share than value share) suggests the product is cheap, whilst a negative gap indicates the product is of a higher quality (see Table 9).

Certain countries, such as Thailand, Indonesia and Russia, stand out for their large negative gaps and prices that suggest low-end industrial production. China pays US$1.31 per kilo for Thailand and Indonesia and US$2.55 for Russia. Despite a significant negative gap, Singapore's price per kilo (US$3.13) suggests that this country delivers products of somewhat higher quality. In this respect, it compares more readily with Malaysia (US$4.56) or Turkey (US$5.32). At the other end of the scale are countries that have opted for quality, showing positive gaps and higher prices. In order of the volume of their exports to China, these countries are Italy, Belgium, the United States, Switzerland, Germany and France.

Direct chocolate exports from Africa to China account for less than 0.02% of cumulative volumes between 2015 and 2024, meaning Africa is absent from the statistics. This raises the question of the extent to which the leading exporting countries incorporate African cocoa beans, paste, and butter indirectly into the chocolate they supply to China.

To estimate the proportion of African ingredients (such as beans, paste, butter and powder) used in the chocolate purchased by China, we first studied the country's suppliers and then traced their supply chains. Every country that exports chocolate to China purchases these ingredients. We measured the proportion of these purchases that originated in Africa, whether through direct purchases or via the Netherlands, a hub for African beans destined for Europe (83% of Dutch cocoa imports originate in Africa). We then weighted each country by the volume of chocolate it delivered to China (see Table 10).

Our calculations show that African producers in the cocoa supply chain would directly contribute 44.2% of the inputs of chocolate exporters to China. This proportion, corrected for their purchases of African inputs from Dutch traders, would rise to 56.1%. This phenomenon is more pronounced for European chocolate manufacturers (Belgium, Germany and Switzerland) than for Asian manufacturers (in Malaysia, Indonesia, and Singapore) and for Russian ones, for whom the Dutch channel is marginal.

Table 10.– Share of African inputs in chocolate exports to China (2015–2024)

Exporting countries	Exports to China		Inputs			Africa's share	
	tonnes	share	total	Africa (direct)	Via Nether-lands	direct	adjusted
Russia	207,159	27.2%	1,314,100	665,213	47,934	50.6%	53.7%
Italy	126,263	16.6%	2,113,155	747,344	361,546	35.3%	49.9%
Belgium	98,792	13.0%	3,273,002	895,068	1,334,773	27.6%	62.3%
Malaysia	77,731	10.2%	4,516,459	2,757,088	21,381	61.0%	61.4%
Singapore	58,285	7.7%	1,238,427	657,548	80,384	53.1%	58.6%
United States	42,325	5.6%	7,054,548	3,807,636	599,297	54.0%	61.2%
Switzerland	39,308	5.2%	927,203	319,873	277,475	34.5%	59.9%
Germany	36,314	4.8%	6,097,320	2,476,459	2,088,136	40.7%	69.8%
Indonesia	30,437	4.0%	2,303,534	1,006,661	14,159	43.7%	44.2%
France	25,967	3.4%	3,668,306	2,262,000	538,861	61.7%	73.7%
Thailand	19,216	2.5%	231,907	14,407	5,469	6.2%	8.2%
Total	761,797	100%	—	—	—	44.2%	56.1%

This table measures something different to Table 9. While Table 9 records all countries exporting chocolate to China, this table lists countries that have used African inputs for export.

The 56.1% figure is a minimum, not a maximum. Firstly, the Netherlands itself purchases only a small proportion of its inputs from local traders who have processed African beans. Secondly, certain producing countries are direct importers of African inputs and also supply processed inputs to other exporters. These indirect African channels have not been accounted for here.

Therefore, Africa appears to be the global bedrock of the chocolate manufacturing input supply chain. It will remain statistically absent from chocolate exports to China or any other country as long as it has not developed an industrial base that exploits these inputs. To what extent can the Chinese tariff exemption contribute to this?

5. The Chinese tariff exemption and the development of the African cocoa industry

The tariff exemption that came into force on 1 May 2026 sent a positive signal to African cocoa-producing countries that do not hold LDC status. Between 2015 and 2024, 95% of supply-chain production (HS 18) came from four non-LDC countries (Côte d'Ivoire, Ghana, Cameroon and Nigeria), whose exports to China accounted for 6.7% of Chinese imports in the chain (see Table 11). This measure could therefore incentivise these countries to develop their supply chains and their trade with China. However, the difficulties lie not in the willingness of the producing countries, but in their scope for action. African countries find themselves at the confluence of three dynamics.

The first dynamic stems from the expected growth of the nascent Chinese chocolate market, which could justify increased imports of African products. However, as we have seen, this hope could be thwarted by competition from countries such as Thailand, Indonesia and Russia, which favour low-end products source very little from Africa. At the same time, the Chinese domestic market is moving towards more expensive products and consuming increasingly elaborate chocolate imported from Europe (Italy, Belgium and Switzerland) at high unit prices. In the short or medium term, this demand cannot be met by African supply.

The second dynamic is the externalisation of primary processing. The near-disappearance of raw bean imports in favour of semi-processed products shows that China has given up large-scale

grinding and is now leaving this task to Malaysia and Indonesia. This disadvantages African countries that do not have the same level of market access.

Tableau 11.– African producing countries (2014–2024)

African producing countries	LDC	Production 2015-2024		Share of Chinese HS 18 imports 2015–2024
		tonnes	Share	
Côte d'Ivoire	No	20,312,565	55.7%	3.0%
Ghana	No	8,117,525	22.2%	3.5%
Cameroun	No	3,115,862	8.5%	0.2%
Nigeria	No	3,007,703	8.2%	0.7%
Uganda	Yes	391,902	1.1%	0.0%
Sierra Leone	Yes	377,236	1.0%	0.0%
Congo (DR)	Yes	250,070	0.7%	—
Liberia	Yes	198,000	0.5%	—
Guinea	Yes	195,831	0.5%	0.1%
Tanzania	No	134,000	0.4%	0.0%
Togo	Yes	130,600	0.4%	0.8%
Madagascar	Yes	130,521	0.4%	0.0%
Congo	No	84,300	0.2%	–
Sao Tomé-et-Principe	No	33,048	0.1%	—
Equatorial Guinea	No	8,700	0.0%	—
Angola	Yes	4,564	0.0%	—
Central African Rep.	Yes	1,352	0.0%	—
Gabon	No	1,000	0.0%	—
Comoros	Yes	433	0.0%	—
Benin	No	—	—	0.0%
Total		36,495,213	100.0%	8.3%

The third dynamic is the geographical reorientation of bean suppliers, such as those in Ecuador and Papua New Guinea. While this shift can be partially explained by the 2023–2024 crisis in Africa, it should not distract from the fact that China's consumption upgrade is leading to a voluntary diversification of sourcing towards regions that produce 'fine' cocoa.

An African entrepreneur manufacturing chocolate for export to Europe would face a 30% customs duty, whereas the Chinese market is now free of this obstacle. For exporters capable of meeting Chinese customs standards, there is a real comparative advantage. However, the tariff exemption does not create the productive and logistical capacities necessary to exploit this advantage. The risk is therefore a consolidation of primary commodity specialisation rather than its attenuation.

The true obstacle is structural, not tariff-related. The fundamental difference between African and Asian supply chains is not access to raw materials, but where value is created through processing. Whilst the zones where cocoa is produced remain unchanged, the industrial centre of gravity for its processing has shifted to Asia.

For the tariff exemption to effectively stimulate the growth of the African cocoa industry, three conditions must be met: investment in second-stage processing capacity, particularly butter presses; support to obtain Chinese sanitary certifications; and, most importantly, a shift in Chinese demand towards African origins. This would require African countries to increase their production of both standard and higher-quality aromatic cocoa. However, such repositioning is a long-term investment, hindered by the volatility of world prices and the ageing of plantations, which severely limits its short-term feasibility.