

Analysis of Foreign Trade Between Türkiye and Africa *

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Abstract

While enhancing our economic relations with African countries was positioned as a target within Türkiye's vision, especially after the Cold War, this could only come true in the first decade of the 21st century. As a result, there have been significant trade volume developments. Although Türkiye had a trade deficit with Africa from the mid-90s to the early 2000s, it became a surplus party in the subsequent period due to stagnation and the impacts of various crises. The trade with Africa is primarily with North African countries due to geographical proximity and historical ties. While Africa's share in Türkiye's total foreign trade volume has been gradually increasing, it remains significantly lower compared to Asia and Europe. Relations between the continent and Türkiye haven't grown stronger yet, mainly because most African countries were former colonies. On the other hand, Türkiye's geographical proximity to Africa offers a significant opportunity to meet African countries' agricultural and food needs. In this context, this study aims to analyze Türkiye's trade with the African continent and to reveal the opportunities, threats, strengths, and weaknesses this trade offers for both actors. Furthermore, the study provides recommendations to enhance these relations in this framework.

Keywords: Africa-Türkiye, Foreign Trade, Economic Relations

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Türkiye ile Afrika Arasındaki Dış Ticaretin Analizi

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Öz

Afrika ülkeleri ile iktisadi ilişkilerimizi geliştirmek özellikle Soğuk Savaş sonrası dönemde Türkiye'nin vizyonu içinde bir hedef olarak yer almasına rağmen bu ancak 21. Yüzyılın ilk 10 yılında gerçekleşebilmiştir. Bunun sonucu olarak ticaret hacminde de önemli gelişmeler kaydedilmiştir. Türkiye 90'lı yılların ortasından 2000'li yılların başına kadar olan dönemde Afrika ile ticaretinde yaşadığı durgunluk ve krizlerin etkisiyle açık vermesine rağmen izleyen dönemde fazla veren taraf olmuştur. Afrika ile ticareti coğrafi yakınlık ve tarihi bağlar nedeniyle daha çok Kuzey Afrika ülkeleri iledir. Türkiye'nin toplam dış ticaret hacmi içerisinde Afrika'nın payı gittikçe artmakla beraber Asya ve Avrupa kıtalarına göre oldukça düşük düzeydedir. Afrika ülkelerinin çoğunluğunun sömürge altında kalmış olması sebebiyle Türkiye ile kıta arasındaki ilişkiler henüz güçlenememiştir. Diğer yandan Türkiye'nin coğrafi açıdan Afrika'ya yakın olması, Afrika ülkelerinin ihtiyaç duydukları tarım ve gıda ürünlerinin karşılanması açısından Türkiye'ye önemli bir fırsat sunmaktadır. Bu bağlamda çalışmanın amacı Türkiye'nin Afrika kıtası ile gerçekleştirdiği ticareti analiz ederek, bu ticaretin her iki aktör için de getirdiği fırsatları, tehditleri, güçlü ve zayıf yönleri ortaya koymak ve bu çerçevede ilişkileri geliştirmek adına öneriler sunmaktır.

Anahtar Kelimeler: Afrika-Türkiye, Dış-Ticaret, Ekonomik İlişkiler

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1. Introduction

Foreign trade is one of the most significant driving forces of growth and development, especially in open economies. Just as we can accelerate the process of overseas expansion by industrializing, it is also possible to reach an advanced level in some industrial regions during the expanding process. Although the economic context of international expansion policies has different dimensions, the foreign trade aspect is undoubtedly the most crucial part. Since the 1980s, Türkiye has adapted to the global trade and capital-centric liberalization policies, making a series of legal-institutional regulations accordingly. The primary purpose of these regulations is to complete the development process by following an open foreign trade policy. This will make it necessary and feasible to establish large-scale facilities to sell products to a broad market, benefit from scale economies, and thus utilize advanced production techniques.

In Türkiye's foreign trade, while the European Union (EU), the USA, China, and Russia hold significant shares, our trade with Africa continues to gain momentum as a reflection of recent developments in diplomatic and political relations. Foreign trade relations cannot be materialized on a ground that will produce healthy and productive results since many countries in Africa have been subjected to colonial economic pressures and, therefore, are incompetent in implementing independent monetary policies, and trade primarily takes place between economically similar countries (intra-industry trade) can be seen as a negative situation. However, it is also a fact that new approaches based on equal distance, eye level, and mutual benefit can balance this situation. Particularly, it is worth noting that Türkiye's trade relations with North African countries, with whom it has closer geographical and deeper historical-cultural ties, are more apparent and gripping compared to other countries. Given that societies' economic development generally tends to be positive in the long run, the multipolar world system's global manifestation, and the presence of rich natural resources in these countries, trade with African countries appears to be convenient and possible cyclically as well as contributing to the economic welfare of the societies.

The primary purpose of this research is to understand and grasp the situation between African countries and Türkiye in the context of foreign trade. The actors to be discussed in the study will be the Republic of Türkiye and the continent of Africa. Due to the unavailability of some data covering all of Africa, significant country

groups representing Africa have been analyzed. Also, due to a lack of data, time intervals can vary in various subheadings.

Within this framework, the following questions will be addressed:

- How has the development of foreign trade between African countries and Türkiye evolved over the years, and what factors determine this development?
- What goods and groups of goods constitute trade between Türkiye and Africa?
- What is the weight of sectors in foreign trade?
- How have the continents' shares and developments in Türkiye's foreign trade been shaped?

Data for this study was obtained through the Turkish Statistical Institute (TURKSTAT), Trademap, World Bank, Arcan Development Bank, World Trade Organization (WTO), International Trade Center (ITC), OECD, and UNCTADSTAT. Based on the information obtained from these data, some conclusions related to foreign trade have been drawn. Various numerical data and ratios under many subheadings have been calculated and interpreted by us.

2. Türkiye - Africa Foreign Trade

2.1. General Situation

Developing relations and cooperation between the African continent and Türkiye is one of the fundamental principles of multidimensional foreign policy. It is expected that from the second half of the 21st century, Africa will become a more active and increasingly significant actor in the global system. The idea of establishing economic ties with African countries was on Türkiye's agenda after the end of the Cold War; however, no steps were taken until 1998. Due to the importance of commercial and economic relations in foreign policy, Türkiye-Africa relations progressed in the first decade of the 21st century.¹ Türkiye's economic expansion in Africa began in 2003, with the preparation of the "Strategy for Enhancing Economic Relations with African Countries" by the Turkish Undersecretariat for Foreign Trade and the opening of new offices of the commercial counselor in African

¹ Mustafa Dinçer, "Türkiye-Afrika İlişkileri ve Afrika Açılımı", (Master Thesis, Ufuk University, 2019), 35.

countries. After adopting this strategy, trade with Africa developed rapidly, and by the end of 2007, the foreign trade volume had risen to approximately \$11 billion.² Türkiye shares her historical experience, social, political, and cultural accumulation, opportunities, and resources with African countries based on the principle of "African solutions to Africa's problems" and mutual benefits. Türkiye's Africa policy, rooted in historical foundations including the political, humanitarian, economic, and cultural bases, is implemented in four dimensions: bilateral, regional, continental, and global.³

In this context, Türkiye has made significant progress in its relations with Sub-Saharan African (SSA)⁴ countries on many fronts in recent years. With the process that began in 1998 and accelerated with Türkiye's observer membership to the African Union (AU) in 2005, and as part of the multidimensional process of the Open Africa Policy, rapid progress has been made in various areas such as trade and cultural projects, especially political relations with regional countries, investment projects, military cooperation, security, and development. The completed African Initiative Policy was replaced by the African Partnership Policy in 2013.⁵ The Africa Partnership Policy, an output of an integrated approach that includes the activities of the public sector, the private sector, civil and humanitarian organizations, aims to contribute to the country's social and economic development, peace, and stability. In addition to the African continent, bilateral relations are developed based on equal partnership and mutual benefits.

One of the most tangible indicators of strengthened relations between Türkiye and Africa is the developing economic relations and

² İhsan Çomak, "Türkiye'nin Afrika Politikası ve Sağlık Sektöründe Çalışan Türk STK'ların TİKA'nın Desteğinde Afrika'da Yürüttüğü Faaliyetlerin Bu Politikaya Etkisi", *Avrasya Etütleri*, 40, No. 2 (2011): 10-31.

³ Özgür Üçkuş, *Türkiye-Afrika İş Birliğinde. Kalkınma Yardımları, Araştırma Raporu*, (Ankara: Afrika Vakfı Yayınları, November 2021).

⁴ Sub-Saharan African Countries: Geographically, this region is located south of the Sahara Desert. Politically, it refers to all countries in the same region, excluding Sudan. The region encompasses the part of Africa that is outside North Africa and where Arab States are located. Somalia, Djibouti, Comoros, and Mauritania are both Arab States and Sub-Saharan States. The relationships with African countries include Angola, Benin, Botswana, Burkina Faso, Burundi, Djibouti, Republic of Chad, Equatorial Guinea, Eritrea, Ethiopia, Ivory Coast, Gabon, The Gambia, Ghana, Guinea, Guinea Bissau, South Africa, South Sudan, Cape Verde, Cameroon, Kenya, Union of the Comoros, Republic of the Congo, Democratic Republic of the Congo.

⁵ Oktay Salih Akbay, "Türkiye-Afrika Ticari İlişkileri: 2009-2014 Dönemi", *Balkan Sosyal Bilimler Dergisi* 4, No. 8 (2015): 4-12.

exponentially increasing trade figures. Türkiye's total trade with the African continent has risen from \$5.4 billion in 2003 to \$34.5 billion by the end of 2021. The volume of projects undertaken by Turkish construction companies has grown rapidly in Africa, reaching a level of \$77.8 billion. During this period, there were business councils with 45 African countries, 40 of which were SSA countries.⁶ Maintaining the transaction volume under the conditions of the COVID-19 pandemic in 2020 is a remarkable achievement.

In addition to Türkiye's bilateral relations with African countries, its relations with the African Union are also strengthening. Türkiye became an observer member of the AU in 2005 and was declared as a strategic partner of the continent at the Summit held in 2008. Relations have reached a sustainable mechanism at the First Türkiye-Africa Partnership Summit held in Istanbul between August 18-21.⁷ Türkiye and Africa agreed to launch simultaneous projects in various fields with a five-year schedule adopted with the "2015-2019 Joint Implementation Plan" at the Second Türkiye-Africa Partnership Summit held between November 19-21, 2014. In this context, projects have been implemented according to the priorities of African countries in the fields of trade, investment, education, culture, enhancement of peace and security relations, technology transfer, rural agriculture and economy, energy, and transportation. Türkiye also decided to hold "Ministerial Review Conferences" with the AU at Summit meetings to be held every five years. The Second Türkiye-Africa Union Ministers Review Conference was held in Istanbul on February 11-12, 2018. The conference was a good opportunity to address all aspects of the Türkiye-Africa Partnership. At the 3rd Türkiye-Africa Partnership Summit in 2021, President Erdogan expressed his belief that the Summit would mark a new phase in our relations with the AU and Continental countries.⁸

The AU also aims to enhance its relations and strategic partnership with Türkiye in the 2063 Agenda. For this reason, Türkiye and the AU

⁶ "Türkiye Afrika İlişkileri", Türkiye Cumhuriyeti Dışişleri Bakanlığı: <https://www.mfa.gov.tr/turkiye-afrika-iliskileri.tr.mfa>, Last Access: 4 September 2023.

⁷ Elem Eyrice Tepeciklioğlu, "Afrika Kıtasının Dünya Politikasında Artan Önemi ve Türkiye-Afrika İlişkileri", *Ankara Üniversitesi Afrika Çalışmaları Dergisi*,1, No.2 (2012).

⁸ Abdulkadir Sezai Emeç, Fatih Kaplan ve Ahmet Koluman. "Türkiye İle Afrika Ülkeleri Arasındaki Dış Ticaret Üzerine Bir İnceleme", *Süleyman Demirel Üniversitesi İktisadi ve İdari Bilimler Fakültesi Dergisi* 26, No. 4 (2021): 509-520.

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attach importance to the UN's 2030 Agenda for Sustainable Development as guiding frameworks alongside the AU 2063 Agenda to develop partnerships based on the inclusive growth and sustainable development of African countries.⁹

2.2. Development Trend of Commercial Relations

Within the scope of Türkiye's African initiative, the "Strategy for Developing Commercial and Economic Relations with Africa" implemented in 2003 is a successful step towards enhancing economic ties with countries in the continent. Following the cooperation summit in 2008, the strategy greatly supported the opening of embassies, trade consultants, newly established TİKA (Turkish Cooperation and Coordination Agency) offices, as well as the direct flights initiated by Turkish Airlines.¹⁰

The trade balance in favor of Türkiye, which was 7 billion dollars in 2012, increased to 8 billion dollars in 2013. Despite ongoing political tensions, Egypt, which was a trading partner in 2012, became Türkiye's largest commercial partner in Africa with a trade volume of 5.1 billion dollars.¹¹

Table 1: Türkiye's Foreign Trade with Africa (Thousand Dollars)

Year	Export	Import	Foreign Trade Volume	Foreign Trade Balance	Export/Import coverage ratio %
1996	1.164.604	1.993.965	3.158.569	-829.361	58.4
1997	1.233.2	1.993.2	3.226.4	-760	61.8
1998	1.812.1	1.758.7	3.570.8	53.4	103
1999	1.655.4	1.687.7	3343.1	-32.3	0.98
2000	1.372.7	2.714	4.086.7	-1.341.3	5.05
2001	1.520.7	2.818.5	4.339.2	-1.297.8	0.53

⁹ "Türkiye Afrika İlişkileri", Türkiye Cumhuriyeti Dışişleri Bakanlığı: <https://www.mfa.gov.tr/turkiye-afrika-iliskileri.tr.mfa>, Last Access: 4 September 2023.

¹⁰ "Türkiye ile Afrika Arasındaki Ekonomik ve Ticari İlişkiler", https://tasam.org/Files/Icerik/File/turkiye_ile_afrika_arasindaki_ekonomik_ve_ticari_iliskiler_8f958eff-55b9-446e-b0bb-f23670952c8e.pdf Son Erişim: 4 Eylül 2023.

¹¹ Emeç, Kaplan ve Koluman, "Türkiye," 509-520.

2002	1.681.7	2.645.6	4.327.3	-963.9	0.63
2003	1.838.8	3.311.8	5.150.6	-1.473	0.55
2004	2.949.3	4.778.6	7.727.9	-1.829.3	0.61
2005	3.631.247	3.216.471	6.847.718	4.14.776	1.12
2006	4.565.791	3.910.081	8.475.872	6.55.71	1.16
2007	5.976.343	5.106.537	11.082.88	8.69.806	1.17
2008	9.062.603	5.596.476	14.659.079	3.466.127	1.61
2009	10.154.64 2	3.937.89	14092.532	6.216.752	25.7
2010	9.283.066	4.824.007	14.107.073	4.459.059	1.924348
2011	10.333.82 1	6.766.713	17.100.534	3.567.108	1.527155
2012	13.356.85 1	5.921.79	19.278.641	7.435.061	22.55543
2013	14.145.54 3	6.031.11	20.176.653	8.114.433	23.45429
2014	13.754.39 8	5.937.961	19.692.359	7.816.437	2.31635
2015	13.131.15 5	5.325.316	18.456.471	7.805.839	2.465798
2016	11.903.38 9	5.404.555	17.307.944	6.498.834	2.202473
2017	12.237.30 1	7.182.089	19.419.39	5.055.212	1.70
2018	15.088.94 9	7.137.423	22.226.372	7.951.526	2.11
2019	16.623.20 1	5.820.748	22.443.949	10.802.45	2.85
2020	15.243.75 0	7.304.590	22.548.340	7.939.160	2.08
2021	21.211.92 2	8.232.594	29.444.516	12.979.328	2.57
2022	24.035.42 2	9.510.503	33.545.925	14.524.919	2.52

Source: Prepared by the authors using TUIK 2021 data.

The data in Table 1 shows that between 1996-2004, except for 1998, the trade balance always had a deficit, primarily due to the financial crisis Türkiye experienced during that period. However, from 2004 to 2022, a consistent trade surplus has been observed. This increase has continued steadily. Indeed, the trade surplus in 2022 is approximately twice as much than that of 2012.

According to the data, Türkiye's trade volume with Africa, which was 3 billion dollars in 1996, increased to 7.7 billion dollars in 2004. Particularly after the crises experienced in Türkiye, this momentum picked up. Consequently, the foreign trade volume between Türkiye and African countries was seen to be around 8.5 billion dollars in 2006. While this increase was monitored at 22 billion in 2018-2019, it surpassed 30 billion dollars by 2022. The revival of deferred sales and expenditures between countries following the end of the pandemic, along with the Ankara government's renewed investments in the African continent, can be cited as reasons for this development. Especially in the last five years, with the trade surplus increasingly changing in favor of Türkiye, an increase in export-to-import coverage ratios has also been observed.

3. Türkiye's Foreign Trade with African Country Groups

When examining the commercial and economic relations between Türkiye and Africa, it is observed that Türkiye always has a trade surplus. A noteworthy point in the increasing trade is that economic relations with SSA (Sub-Saharan African) countries have developed faster than economic relations with North African countries, which have cultural-historical ties with Türkiye and are among its traditional markets. In the last five years, Türkiye's trade volume with SSA countries has increased by 211%, rising from 742 million dollars in 2000 to 2.3 billion dollars in 2004. The increase gained momentum especially in 2004, and the growth in trade volume reached a high figure of 70%. Despite the significant share of North African countries, Türkiye has rapidly developed her commercial relations with SSA countries. For example, between 2000 and 2004, trade with North African countries increased by 62%, while trade with SSA countries grew by 211% during the same period. As a result of the rapid increase in Türkiye's commercial relations with SSA countries, the share of

these countries in Africa's trade, which was 18% in 1999, rose to 30% in 2004, while the share of North African countries decreased from 82% to 70%.¹²

Table 2 Türkiye's Exports to Africa (Thousand Dollars)

Year	North African Countries	Export share (%)	SSA Countries	Export share(%)
1996	991.085	4,2	173.519	0,7
2000	1.087.400	3,9	285.327	1
2005	2.544.398	3,4	1.086.849	1,5
2010	7.025.168	6,1	2.257.898	2
2015	8.918.833	5,9	4.212.322	2,8
2016	8.069.446	5,4	3.833.943	2,6
2017	7.918.462	4,8	4.318.839	2,6
2018	9.915.077	5,6	5.173.872	2,9
2019	10.828.878	6	5.794.323	3,2
2020	9.214.728	5,4	6.029.472	3,6
2021	13.336.357	5,9	7.875.566	3
2022	14.158.805	6,2	9.876.617	3,8

Source: Prepared by the authors using TUIK 2021 data.

As can be seen from Table 2, exports have shown a significant increase especially since 2010, North African countries have constituted a significant part of the trade between Türkiye and Africa in terms of both exports and imports. The change in Türkiye's exports to Africa is similar to the global trend. Türkiye's exports to Africa, which peaked at \$14.1 billion in 2013, declined in the years 2015-2016, but showed a certain increase in 2017, reaching \$11.7 billion. Türkiye's exports to Africa in 2017 increased by 2.3% compared to the previous year.

¹² Can Altan, "Afrika Ülkeleriyle Ekonomik Ve Ticari İlişkilerimiz". https://www.mfa.gov.tr/data/Kutuphane/yayinlar/EkonomikSorunlarDergisi/Sayi17/XVII_CanAltan.pdf, Son erişim: 4 Eylül 2023.

During this period, while exports to North Africa decreased by 15%, exports to Sub-Saharan Africa increased by 14%. In 2019, Türkiye's exports to Africa (both north and SSA countries) reached \$14 billion. North African countries make up a large portion of Türkiye's exports to African countries. The figures indicate that the share of Türkiye's exports to African countries in total exports is increasing. In recent years, while the share of North African countries in total exports is about 6%, the share of other group countries is approaching 4%. An important point to note is the increase in exports to SSA countries. A significant factor in this has been public diplomacy carried out successfully in recent years.

Table 3 Türkiye's Imports from Africa

Year	North African Countries	Import share(%)	SSA Countries	Import Share(%)
1996	1.618.435	3,7	375.530	0,8
2000	2.257.119	4,1	457.101	0,8
2005	1.584.201	1,3	1.632.270	2,7
2010	3.098.091	1,7	1.725.916	0,9
2015	3.173.401	1,5	2.151.915	1
2016	3.252.568	1,6	2.151.987	1,1
2017	4.203.460	1,8	2.978.629	1,2
2018	4.685.547	2	2.451.876	1,1
2019	4.009.992	1,9	1.810.756	0,9
2020	4.752.264	2,2	2.552.326	1,2
2021	5.417.703	1,9	2.814.891	1
2022	6.099.320	1,6	3.411.183	0,9

Source: Prepared by the authors using TUIK 2021 data.

As can be seen in Table 3, between the years 2010-2022, there has been a steady increase in Türkiye's imports from Africa. A significant portion of this import comes from North African countries. When looking at the ratio within the total imports, while the share of North

African countries ranges between 1.5% to 2%, the share of other countries is approximately 1%.

Egypt is again ranked first in Türkiye's imports from African countries with 27.83% of the total. It is followed by South Africa, Morocco, Algeria, Ivory Coast, Libya, Tunisia, Nigeria, Mozambique, and Ghana respectively. When examining the obtained economic figures on a country-by-country basis, it is evident that a very large portion of foreign trade transactions are conducted with North African countries such as Egypt, Morocco, Libya, Algeria, and Tunisia.¹³

4. Main Products in Türkiye's Foreign Trade with Africa

In Türkiye's exports to Africa, iron and steel products rank first with \$1.8 billion, followed by machinery and mechanical products with \$1.5 billion. On the other hand, in 2017, thin-coated metals, precious stones, precious metals, fuels, and petroleum oils were at the forefront of product groups, while food items like wheat flour and pasta also became prominent. It is observed that a significant portion of the exported items are high-value-added products. Indeed, mineral fuels and oils, which have an important place in exports to Africa, indicate that Türkiye processes a portion of the crude oil it imports and exports it to African countries.¹⁴

In Türkiye's imports from Africa, the most important products are mineral fuels, distillation products¹⁵, and mineral oils, classified under the 27 HS code.¹⁶ It is seen that the imports of these products decreased from \$2 billion in 2017 to \$1.7 billion in 2020. This decline can be attributed to the COVID-19 pandemic. In 2020, the highest import belonged to pearls and precious stones with \$1.8 billion. Other

¹³ Abdoul-Aziz Ali Sara ve İlkay Dellal, "Türkiye'nin Afrika Ülkeleri ile Tarım Ürünleri Ticareti", *Tarım Ekonomisi Araştırmaları Dergisi*, 4, No. 2(2018): 50-53, 46-57.

¹⁴ Ryan Hafız Ahmed İbrahim, "Türkiye ile Afrika Ülkeleri Arasındaki Dış Ticaretinin Sektörel ve Yapısal Analizi", (Master Thesis, Sakarya University, 2022), 40.

¹⁵ Distillation is a separation process that involves heating a mixture containing two or more components to produce vapor and liquid phases, thereby obtaining mixtures enriched in the more volatile component.

¹⁶ GTIP stands for 'Gümrük Tarife İstatistik Pozisyonu' (Customs Tariff Statistical Position). In our country, although GTIP is generally used in place of the tariff schedule, it is actually the name given to the 12-digit code in the Turkish Customs Tariff Schedule.

significant imported products include plastics and plastic products at \$368 million, cocoa and cocoa products at \$3 million, iron and steel at \$245 million, aluminum and aluminum products at \$107 million, machinery and electrical devices at \$211 million, organic or inorganic chemical compounds of precious metals at \$188 million, and oil seeds and their medical and industrial products at \$232 million.¹⁷

5. Sectoral Dimension of Trade with Africa

5.1. Agriculture Sector

When conducting a sectoral analysis of Türkiye's foreign trade with Africa, the status of the agriculture sector between the years 2008-2020 is summarized in the table below.

Table 4: Türkiye's Foreign Trade with Africa by Agriculture Sector (thousands dollar, %)

Year	Agricultural export \$	Share %	Agricultural import \$	Share %	Foreign Trade Balance
2008	1.298.415	14.3	686890	12.2	611.525
2009	1.229.278	12.1	607805	15.4	621.473
2010	1.455.474	15.6	855795	17.7	599.679
2011	1.874.665	18.1	938750	13.8	935.915
2012	1.937.016	14.5	901419	15.2	1.035.597
2013	2.217.696	15.6	1011393	16.7	1.206.303
2014	2.174.451	15.8	1,196,463	20.1	977.988
2015	2.048.510	15.6	1,315,563	24.7	732.947
2016	2.075.699	17.4	1,281,475	23.7	794.224
2017	2.258.913	18.4	1,388,510	19.3	870.403
2018	767.717	5.0	-	-	-

¹⁷ Ryan Hafız Ahmed Ibrahim, “Türkiye ile Afrika Ülkeleri Arasındaki Dış Ticaretinin Sektörel ve Yapısal Analizi”, (Master Thesis, Sakarya University, 2022), 48-53.

2019	1.010.987	6.0	1,144,171	1.9	-133.184
2020	1.332.661	8.9	1,115,984	15.2	1.332.549

Source: Prepared by the authors using TUIK 2021 and Trade Map data.

According to Table 4, the export value of the agriculture sector rose from 1.29 billion dollars in 2008 to 2.26 billion dollars in 2017. The average over this ten-year period is 1.86 billion dollars. During this period, agricultural exports increased by 73%. As of 2020, it can be seen that the share of agricultural products in exports is about 9%, while in imports it is about 15%. Looking over the years, it's evident that Türkiye consistently has a trade surplus in this sector. On the other hand, due to the rapid increase seen in Africa's exports in this sector, the disparity is trending downward.

Türkiye exports various agricultural products to Africa, including pasta, flour, starch, grains, sugar and sweet products, biscuits, margarine, yeast, fertilizers, baking powder, poultry meats, agricultural pesticides, canned goods, tomato paste, vegetable oil, and various other agricultural goods. On the other hand, Türkiye primarily imports raw materials from Africa, such as cocoa, mango, pineapple, banana, coffee, papaya, peanuts, palm oil, dried fruits, cotton, tropical timbers, raw rubber, and lumber, whether unprocessed or semi-processed, among other agricultural products.

5.2. Industry Sector

When conducting a sectoral analysis of Türkiye's foreign trade with Africa for the years 2014–2020, the situation in the industrial sector is summarized in the table below:

Table 5: Türkiye's Foreign Trade with Africa by Industry Sector (thousand dollar, %)

Year	Industry Export	Industry Import	Foreign Trade Balance
2014	12.514.337	7.006.109	5.508.228
2015	11.900.454	4.455.375	7.445.079

2016	11.515.382	3.810.675	7.704.707
2017	10.750.025	5.008.579	5.741.446
2018	13.673.916	4.493.121	9.180.795
2019	15.413.168	4.458.389	10.954.779
2020	13.488.023	4.211.874	9.276.149

Source: Prepared by the authors using TUIK 2021 and Trade Map data.

The development philosophy of the Republic of Türkiye is based on the rapid transformation of the economic structure towards the industrial sector. According to Table 5, between 2014-2020, it is observed that Türkiye always had a trade surplus in her foreign trade with African countries in the industrial sector. However, it is clear that Türkiye has not made a significant leap in her industrial product exports to Africa. During the period from 2014-2020, industrial exports fluctuated between 10 billion dollars and 15 billion dollars. The trend that balances the trade disparity in the agricultural sector is not seen in the industrial sector. In addition, it is possible to state that the share of the industrial sector in exports to Africa is approximately around 90%. In industrial products, machinery, iron, and steel are at the top, followed by white goods and reinforced concrete, construction iron, ceramic glass, and similar products.

6. Structural Foreign Trade (Africa’s exports to Türkiye and imports from Türkiye)

The table below shows the numbers and ratios of structural foreign trade between 2017 and 2020.

Table 6: Structurally, Foreign Trade

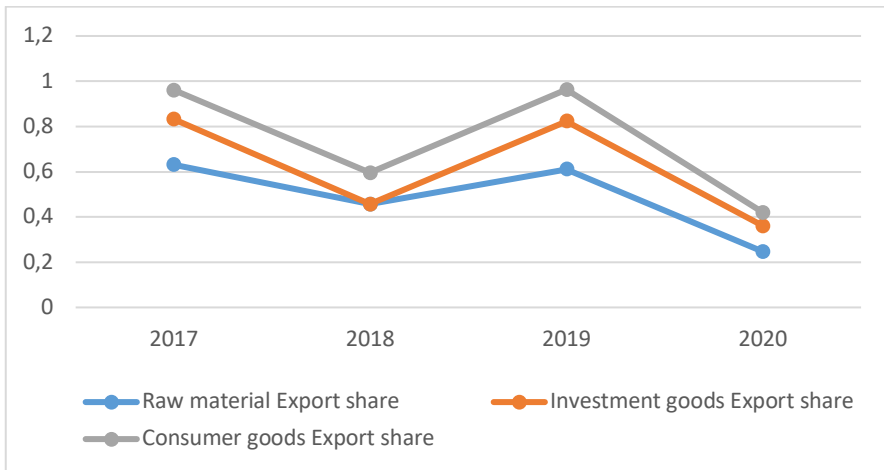
Raw material				
Year	Export	Share %	Import	Share %
2017	2.956.744	0,6	3.370.296	0,3
2018	2.380.741	0,4	2.844.381	0,2

2019	2.786.473	0,6	3.196.442	0,2
2020	2.415.573	0,2	3.030473	0,5
Investment (capital) goods				
Year	Export	Share %	Import	Share %
2017	943.462	0,2	1.150.099	0,1
2018	1.070.175	0,2	1.367.205	0,1
2019	970258	0,2	1.291.502	0,1
2020	1.116.684	0,1	1.332086	0,2
Consumer goods				
Year	Export	Share %	Import	Share %
2017	599.879	0,1	818.751	0,08
2018	727.102	0,1	818.751	0,05
2019	637.737	0,1	665.659	0,06
2020	580.180	0,05	709.538	0,12

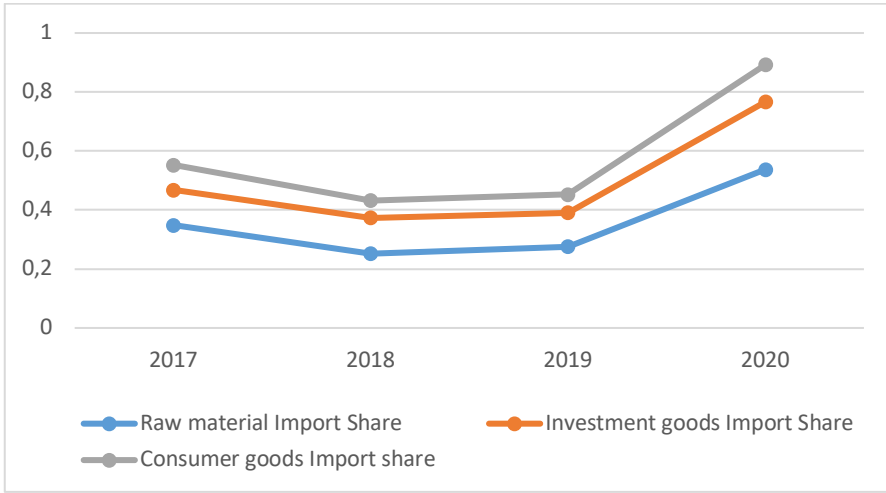
Source: Prepared by the authors using TUIK 2020 data.

Structurally foreign trade, due to the impact of the pandemic in 2020 can be disregarded for all goods groups in Africa's exports to Türkiye. Looking at raw material exports, exports from the relevant countries to Türkiye dropped from 60% of total exports in 2017 to 45% in 2018; however, in 2019, it was again around 60%. The export of capital goods took place at around 20% (excluding the year 2020). When looked at this ratio from the perspective of consumer goods, it occurs at a margin of 12-13%. In other words, proportionally the highest exports from the relevant African countries to Türkiye were respectively raw materials, investment goods, and consumer goods. The reason why total ratio in goods group trade cannot be added up to 100% mainly stems from the lack of data on intermediate goods (semi-finished products) and other products. For instance, this remaining portion for 2019 is about $1 - (0.14 + 0.61 + 0.21) = 4\%$. From 2017 to 2019, imports of raw materials from Africa to Türkiye decreased from 34% to 27%. Investment goods imports have been following a steady trend in the 11-12% range. There's a declining trend from 8% to 6% in consumer goods (excluding 2020). The stable ratio of investment goods, combined with a decrease

in other goods groups, can be interpreted as an increase in intermediate goods imports. According to the table above, based on calculations, the import of intermediate goods from Türkiye by Africa is over 50% between 2018 and 2019. In conclusion, the above table shows that Africa is an intermediate goods buyer from Türkiye, while it is a raw material supplier to Türkiye. According to Table 14, between 2017-2020, significant items include processed and unprocessed crude oil, cotton, coffee, cocoa, and bananas. When compared to other markets, these raw materials represent a lively market and at the same time offer cheap raw materials to the Turkish industry.



In the chart, it is observed that during the period 2017-2020, raw materials had the highest proportion in Türkiye’s exports to Africa. The 24% rate for raw materials was seen to drop to 16% in 2020 and continued steadily.



Source: Prepared by the authors using TUIK 2020 data

Between 2017 and 2020, in Türkiye's imports from Africa, 2019 again showed the highest proportion of raw material goods at 51%, investment goods at 22%, and consumer goods at 12%.

The chart indicates that the majority of Africa's exports are composed of raw materials. Especially unprocessed raw materials: despite being rich in raw materials, they lack strength in technology and industry. From Türkiye's perspective, given her current position and dynamism, Africa is an important market.

7. Intercontinental Comparison of Türkiye's Foreign Trade

The table below shows the ratio of Türkiye's trade (exports + imports) with each continent within her total trade volume.

Table 7: Share of Türkiye's Foreign Trade with the African Continent and Other Continents within her Total Trade Volume (%)

Year	Africa's share	Europe's share	North America's share	Asia's share	Australia and South America's share
2000	0,000496696	0,570443399	0,090863067	0,253260483	0,013269022

Analysis of Foreign Trade Between Türkiye and Africa

2001	0,000596591	0,553458325	0,09195127	0,259635358	0,012223404
2002	0,000493911	0,575436755	0,080086141	0,248403795	0,012046461
2003	0,000441761	0,550365678	0,066157977	0,268773236	0,012619731
2004	0,000480869	0,574899604	0,064220189	0,294060586	0,011904917
2005	0,035993156	0,539803192	0,058334483	0,328585935	0,012705225
2006	0,037651992	0,521082925	0,054972745	0,343639893	0,013315162
2007	0,003996214	0,512083218	0,048942292	0,37050864	0,014425529
2008	0,043890671	0,46584008	0,054508387	0,409942778	0,015449091
2009	0,057977011	0,472375133	0,053860356	0,394895382	0,014983721
2010	0,047113477	0,456909565	0,058366327	0,408837909	0,016375445
2011	0,045510579	0,447708134	0,060691947	0,405834037	0,019042775
2012	0,049558612	0,414197227	0,055903312	0,452903953	0,018061022
2013	0,047777588	0,413578364	0,048621252	0,411259323	0,017555117
2014	0,047150693	0,413845835	0,050586057	0,395900528	0,0158146
2015	0,050620965	0,428828669	0,052487385	0,400666637	0,015810058
2016	0,049249172	0,443078257	0,054870791	0,395494022	0,017112235
2017	0,004816201	0,42717193	0,059072493	0,390148145	0,021705671
2018	0,054433544	0,42630827	0,058617835	0,567906789	0,021176322

2019	0,057375296	0,414160749	0,055489006	0,487932907	0,017793056
2020	0,057641425	0,519905311	0,069242312	0,330338951	0,032826572
2021	0,059295571	0,512766878	0,061675206	0,281795395	0,027484573
2022	0,048769908	0,051903521	0,057182531	0,279850003	0,0259791125

Source: Prepared by the author using TUIK 2020 data.

While table 7 reveals that the share of Africa in the total foreign trade volume is gradually increasing, this ratio has been seen to reach approximately 5% as of 2022. A decline in foreign trade with Europe has been observed from 57% to 41% during the period 2000-2019. As a reason for this, Türkiye's divergent approaches to EU countries on security, strategic, and political issues, and China's rise as the world's production center in Asia can be pointed out. Also, developing cooperation with Russia on different topics has supported this. However, in the post-pandemic period, foreign trade with Europe has again surpassed 50%, maintaining its top position. The narrowing foreign trade volume with Asia due to the war between Russia and Ukraine can be shown as a cause of this increase. Although the share of Asian countries increased in the 2018-2019 period (48% in 2019), Europe has once again substituted Asia after the pandemic with the influence of the war. The table shows that there has not been a significant change in the share of other continents (North America, South America, and Australia).

The low foreign trade rate that Türkiye has with Africa indicates that it will be difficult for Africa to contribute to Türkiye's economic growth in this aspect. Especially in countries like Türkiye, which adopted an economic understanding focused on economic growth by centering on increasing exports after the 1980s, it is necessary to increase foreign trade shares with the country/country groups involved in mutual trade.

8. SWOT Analysis of Türkiye-Africa Foreign Trade Relations

Strengths

Firstly, Türkiye has a comparative advantage in the agriculture sector and holds a significant position among countries with agriculture-based industries. Furthermore, Türkiye's strategic location, connecting Asia, Europe, and Africa continents, offers tremendous advantages in terms of foreign trade. All these advantages can potentially transform Türkiye into a significant international market and an economic partner for all countries in the world.¹⁸ Another strength of Türkiye is its historically rooted, political, and economic ties with African countries, especially those in the northern part of the continent. In recent years, these relationships have significantly developed and continue to do so. Turkish companies investing in these countries receive comprehensive support.¹⁹

Weaknesses

One of the main weaknesses in Türkiye's trade relations with African countries lies in the fact that the majority of African countries, having been former colonies, could take time to establish and deepen their relations with Türkiye. The colonial history of nearly all the countries on this continent can result in a lack of perception and established habits against recognizing new opportunities and advantages.

A second weakness can be emphasized in the protectionist policies applied to countries outside Europe in many African countries, most of which are former colonies of European powers. This creates a cost disadvantage for Türkiye when trying to get into African markets as an exporter. Another barrier is the limited recognition and understanding of this continent in Türkiye. Consequently, there can be a negative perception about Africa in the mindset of Turkish society.²⁰ Lastly, the fact that Türkiye largely exports intermediate goods to Africa, rather than consumption and investment goods, can be considered a disadvantage, especially when selling goods to this continent where industry is underdeveloped.

¹⁸ Ali Oruç, "Türkiye'nin Afrika Stratejisinin Dış Ekonomik İlişkiler Bağlamında Değerlendirilmesi ve Öneriler" (Master Thesis, T.C. Cumhurbaşkanlığı Strateji ve Bütçe Başkanlığı, İSEDAK ve Uluslararası Kalkınma İş Birliği Genel Müdürlüğü, 2022): 172-179.

¹⁹ Buket Çetin, "Türkiye'nin Orta Doğu ve Kuzey Afrika Ülkelerine Yaptığı İhracatın Analizi", (İstanbul Kültür Üniversitesi, İİBF Üretim Ekonomisi Kongresinde bildiri olarak sunulmuştur, İstanbul, 21-22 Mart 2014).

²⁰ Ali Sara ve Dellal", Türkiye'nin.., 55-46.

Opportunities

Türkiye's geographical proximity to Africa presents a significant opportunity, especially when meeting the agricultural and food product needs of African countries. Secondly, due to their colonial histories, the majority of African countries today desire to establish partnerships with economic powers that have a more secure and egalitarian understanding. Therefore, with a “win-win” approach, Türkiye foster economic, social, and political relations with African countries and enhance her economic ties. It can be said that this situation is also an important opportunity. Another opportunity arises as African countries have reduced their dependence on colonial powers in recent years. This means not only the colonial powers but also other countries and firms that invest can find opportunities in Africa. The final opportunity is the presence of a considerable number of Africans studying in Türkiye. Their existence can be a genuine advantage for the future of economic, social, and political relations between Türkiye and African countries. That is to say, these Africans being familiar with Türkiye and its potential, can foster significant relationships with Turkish citizens in their regions, enhancing the overall ties between the two sides.²¹

Threats

One of the primary threats to Türkiye's trade orientation towards Africa is the increased interest of the international economic system's new influential actors in the continent. These actors are intensifying their efforts to boost trade with African countries, thus becoming rivals to Türkiye in the region. Türkiye has emerged as a strong economic and political alternative to the traditional global powers that have historically dominated the African continent with her "win-win" approach. Türkiye has taken significant steps not only in natural resources and precious metals sectors but also in construction, industry, and service sectors across the continent, including West Africa. As a result, Türkiye has developed substantial projects in these areas. Moreover, Turkish trade volume is notably increasing in the eastern part of the continent. At this point, Türkiye has become a potent competitor against China and the USA in several African countries, especially Sudan, Somalia, Ethiopia, and Kenya. Despite China's aggressive stance, Türkiye has adopted a more comprehensive and

²¹ Ufuk Tepebaş “Dönüşüm Sürecindeki Sahra-Altı Afrika Kalkınma, Güvenlik ve Ortaklık”, *Bilge Strateji*, 6, No.10 (2013): 315-380.

development-centered economic policy within the framework of the "One Belt One Road" initiative, reaching agreements worth 500 million dollars (6.2 billion Turkish Lira) and 300 million dollars with Sudan and Somalia respectively. In this context, Türkiye's growing interest in the region is causing discomfort among significant imperial powers globally.²² This situation poses a significant threat to Türkiye-Africa trade relations. Lastly, internal conflicts in some African countries, political instability, terrorism, and organized crimes are barriers hindering economic development and foreign trade.²³

9. Conclusions and Recommendations

Countries prioritize entering foreign trade relations initially with groups of countries that have geographical proximity, historical-cultural ties, common security and strategic bonds. Furthermore, it would not be wrong to state that these relationships diversify and flourish over time. Additionally, the direction of trade relations can change within the dynamic structure of international politics. Today, foreign trade relations between Türkiye and African countries are increasingly gaining importance, consolidating, and seen as worth exploring, due to this diversity and the necessities brought by a multipolar international system.

Foreign trade relationships can develop between countries with similar levels of development (two developed or two less-developed countries) as well as between countries with different levels of development. In the literature, it is possible to see various arguments covering both perspectives. Regarding the countries in the African continent, although they do not have a homogeneous structure, it can be said that they mainly consist of the least developed countries. Trading with such a continent is of great importance for Türkiye, which aims to complete her industrialization and wishes to have a share in the global export of high-value-added products and positioning this situation firmly within foreign trade theorems is challenging.

When examining the economic structure of Africa, it is evident that it possesses rich natural resources, especially in sectors like agriculture, mining, forestry, and energy. African countries have experienced

²² Serhat. Orakçı, "Afrika'da Küresel Rekabet ve Türkiye", *Avrasya Etütleri*, 40, No.2 (2011): 73-96.

²³ Moussa Hissein Moussa, "Afrika'nın Ekonomik Bütünleşmesine Giden Yol: Afrika Kıtasal Serbest Ticaret Antlaşması" *Akdeniz Havzası ve Afrika Medeniyetleri Dergisi*, 2, No. 2 (2020): 37-50.

significant economic growth after gaining independence, especially from the 1960s onwards. The average growth rate of the African economy increased by 5% between 2001 and 2008. Due to the COVID-19 pandemic in 2020, the real national income of economies dependent on tourism decreased from 11.5% to 6.2% in 2021. GDPs of oil-exporting countries rose from a 1.5% decline to a 3.1% increase. In 2021, South Africa ranked first among African countries with the highest unemployment rate, at 35.30%. In 2022, the highest inflation rate in African countries was 245.1%, belonging to Sudan.

When looking by sector, agriculture contributes 32% to Africa's GDP, providing 62% of employment. The agricultural sector mainly depends on products like cotton, wheat, maize, fruits-vegetables, seafood, cattle, and sheep farming, among others. The mining sector follows closely after agriculture. The priority in the mining sector is given to reserves such as diamonds, bauxite, cobalt, platinum, phosphate group metals, and zirconium. The most well-organized sector of the economy on the continent is mining. The industrial sector in North African countries has a broader scope and older production traditions, distinct from the rest of the continent. However, by the end of the 19th century, Africa was seen by Europe solely as a potential raw material source or a natural market. Since gaining independence, many African countries have made initiatives to diversify their foreign trade relations with countries outside the continent.

Africa's multidimensional foreign policy emphasizes the importance of enhancing collaboration with Türkiye. After the Cold War, Türkiye contemplated establishing economic ties with Africa, but no substantial steps were taken until 1998. From that year on, relations accelerated, especially when Türkiye became an observer member of the African Union in 2005. As part of her multidimensional process of opening to Africa, rapid progress has been made in several areas, including commercial and cultural projects, political relations with regional countries, investment projects, military collaboration, security, and development. After adopting this strategy, trade with Africa grew significantly, reaching about \$11 billion in foreign trade volume by the end of 2007. The successful African Initiative Policy was subsequently replaced by the African Partnership Policy in 2013.

The commercial relationship between Türkiye and Africa rose from \$2.5 billion in 1996 to \$7.7 billion in 2004. Although export numbers have been growing over the years, imports have seen limited growth. Between 2005 and 2020, the foreign trade balance consistently had a

trade surplus with Africa and the trade volume reached \$22 billion in 2019. Between 1996 and 2019, the trade volume increased by approximately tenfold.

Looking at the issue from a sectoral perspective, the years 2008-2020 saw a decrease in the share of agricultural products in exports, while the share of industrial products rose. As of 2020, agricultural products accounted for about 9% of exports and 15% of imports. Between 2014 and 2020, Türkiye always had a trade surplus with African nations when it came to industrial products. However, it is clear that Türkiye did not make a significant leap in her exports of industrial goods to Africa, fluctuating between \$10 billion and \$15 billion during 2014-2020.

When comparing Türkiye's intercontinental trade, it's evident that Africa's share has been steadily increasing, reaching a peak of 5% by 2022. This low percentage suggests that in its current state, Africa might not contribute significantly to Türkiye's economic growth. Yet, Africa remains an essential market for Türkiye, especially given Türkiye's current standing and dynamism. On the other hand, by nurturing relations under the premise of "friendship" and "brotherhood", Türkiye strengthens her economic integration with Africa under a "win-win" approach. It can be said that this situation is also an important opportunity. Another opportunity lies in the declining dependency of African nations on colonial powers, opening opportunities not just for former colonialists but other investing countries and firms. The increasing interest of significant global players in the African continent, aiming to boost trade with African nations could pose a threat to Türkiye's trade relations with Africa. In a SWOT analysis context, Türkiye holds a real comparative advantage in the agricultural sector, which occupies a significant portion of the country's economy. Africa is a remarkable actor with rich in economic potential and human resources. Türkiye's relations with Africa have not yet grown stronger due to their colonial histories. Many of these countries, formerly colonized by European powers, have trade barriers such as customs and non-tariff barriers to non-European countries. Türkiye's geographical proximity to Africa offers an opportunity since African countries, owing to their colonial past, now seek more secure and equal partners. Threats to Türkiye's relationship include increased interest from major global economies on the continent and their intensified efforts to enhance trade with Africa. This situation indicates a threat in terms of her relations with Africa. Internal conflicts, political

instability, terrorism, and organized crime in some African countries pose challenges to economic development and trade.

To enhance trade relations, the essential suggestion is to offer easy travel for business-people. Secondly, protectionist measures should be abolished for both sides. Another recommendation is to analyze each country's resources and needs and prioritize trade products accordingly. Furthermore, Türkiye should invest in the inadequate infrastructures of African countries. Collaborating with major actors which are interested in developing trade with regional nations can minimize conflict risks for Türkiye. Recognizing and understanding the African continent through various initiatives in Türkiye is crucial for enhancing relations. Lastly, resources for conducting research on Africa are limited, and those interested in such research should be fully supported.

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