AFRAE Viewpoints Series

Trump's Reciprocal Tariffs and the Future of U.S.-Africa Trade: What's at Stake

AFRAE Research Team | 7 November 2025

EXECUTIVE SUMMARY

This article synthesizes an analysis of Donald Trump's reciprocal tariffs and its potential impact on U.S.-Africa trade, drawing on data from the African Union, World Bank, and trade policy analysis. It examines Kenya's trade profile, sectoral vulnerabilities, and strategic implications.

Established in 2018, the **African Growth and Opportunity Act (AGOA)** grants eligible African countries duty-free access to the U.S. market for over 1,800 tariff lines. The agreement has been instrumental in boosting African exports, but its expiration in September 2025 risks ending decades of development and diversification partnerships in textiles, agriculture, and manufacturing. As Congress deliberates AGOA's renewal, Kenya's trade with the U.S. remains heavily concentrated in textiles and agricultural products, creating significant vulnerabilities. Although trade between countries has been trending upward, Kenya's trade deficit with the U.S. widened significantly in recent years.

Trump's tariffs on the global economy in 2025 are disrupting supply chains and raising costs for households across trade and investment frameworks. Unlike AGOA, which primarily targets sub-Saharan African economies, the tariffs affect nearly all countries worldwide, including major African trade partners. The tariffs have triggered retaliation from China and Canada, further complicating African trade and investment and lower trade flows. However, it has also raised questions about potential diversification away from Chinese manufacturing toward African production, though this remains constrained by infrastructure gaps and US strategic interests.

With AGOA's future uncertain, U.S.-Africa relations are at a crossroads. Balancing African economic interests with broader US strategic priorities will shape the partnership's future. The analysis concludes with recommendations for African governments and businesses to navigate this transition, including diversification strategies, leveraging the African Continental Free Trade Area (AfCFTA) for collective negotiations, and building resilient supply chains.

Introduction to AGOA and the Tariffs

In celebrating the Fourth of July, three possible scenarios could shape U.S.-Africa trade relations: complete AGOA renewal, partial renewal, or expiration.

A. AGOA – Fostering Economic Growth Through Market Access

Overview: The United States has extended its strengthen U.S.-Africa trade by granting duty-free access to sub-Saharan African countries for over 1,800 tariff lines. The agreement, first enacted during Barack Obama's 2000 term, has driven economic growth in key sectors like manufacturing, textiles, and agriculture. However, its expiration in September 2025 risks ending decades of development and diversification partnerships.

Figure 1 Kenya's trade with the United States (2010-2024) (US$ Mn)

Source: Author's Analysis based on data from World Bank WITS database

While AGOA set its exports in 2000, discussions on its renewal in uniform are underway. While AGOA has boosted exports in textiles and agriculture, its benefits have been uneven, with many African countries facing rising shortages of its benefits. Structural issues such as limited infrastructure, regulatory barriers, and competition from Asian manufacturers have hindered broader gains. The upcoming renewal presents an opportunity to address these challenges, including a potential shift toward a more reciprocal trade model.

Implications for AGOA's Future

In considering the future of AGOA, three possible scenarios could shape U.S.-Africa trade relations:

1. Complete Renewal

- **Strengthen Key Sectors:** Prioritizing AGOA benefit investment duty-free access to the U.S. market, supporting growth in sectors like textiles, agriculture, and manufacturing. The focus should remain on these sectors, which have proven beneficial, to ensure maximum impact.
- **Transition to a More Trade-Focused Partnership:** Shifting from aid-driven trade to a more reciprocal partnership, leveraging trade agreements and tariffs to create a mutual economic framework.

2. Partial Renewal

- **Sectoral Investment Support:** Focusing on specific sectors with high potential, such as agriculture or manufacturing, directing future growth and statistics across the continent.

3. Expiration and Transition to Bilateral Agreements

- **Tariffs and Trade Barriers:** Expiration could drive a shift toward tariffs and trade barriers, impacting African exports to the U.S. market. The upcoming reciprocal tariffs on April 9 will further complicate trade relations, potentially leading to increased costs for African exporters.
- **Strategic Partnerships:** The expiration may prompt African countries to diversify their trade partnerships, seeking alternative markets and strategic partnerships with other nations to mitigate the impact of lost preferential trade benefits.

B. Prosper Africa: Expanding Trade Beyond AGOA

Established by the US under the Trump administration, Prosper Africa is a US government initiative to strengthen U.S. trade and investment ties with Africa. It aims to boost US exports, support African economic growth, and foster mutual prosperity. The initiative leverages public-private partnerships, providing technical assistance, market intelligence, and facilitating trade missions and business partnerships across various sectors, including agriculture, technology, and infrastructure. Prosper Africa also supports US companies in navigating African markets and building long-term relationships with African businesses, ultimately strengthening economic ties between the US and Africa.

Since 2018, the U.S. Government has supported the release of US$2 billion across 30 African countries, with an estimated net value of US$1.8 billion.

The following chart highlights the top African countries, ranked by investment value and the number of deals closed.

Figure 2 Deals and Investment Value for the African Country Beneficiaries, Source: Prosper Africa, USAID

Under a renewed Trump administration, continuing and possibly expanding Prosper Africa would align with US economic interests in Africa, leveraging private sector investment to foster growth and trade. The program's success in mobilizing private sector investment demonstrates its value in long-term impact on African economies, especially if agreements shift toward reciprocal terms and increased US investment.

Implications for Prosper Africa's Future

In considering the future of Prosper Africa, three potential scenarios emerge, each with distinct implications for US-Africa trade and economic relations:

1. Expansion of Prosper Africa's Objectives

- **Increased Investment and Market Access:** Its expansion Prosper Africa could drive US companies to invest more in African markets, boosting trade and economic ties. This could lead to US strategic interests and African development priorities. The focus could particularly benefit sectors like technology, infrastructure, and agriculture, aligning with US strategic interests and African development needs.

2. Enhanced Private Sector Partnerships: USAID's broader scale Prosper Africa could facilitate more partnerships between US companies and African businesses, leveraging US expertise and resources to address African challenges and opportunities. This collaboration could lead to mutually beneficial outcomes, such as technology transfer and job creation.

3. Strategic Realignment or Scaling Back: A shift in US foreign policy priorities or budget constraints could lead to a scaling back of Prosper Africa's activities. This could impact the program's effectiveness in fostering trade and investment between the US and Africa.

C. Reciprocal Tariffs: A Global Trade Approach

1. Tariffs as a Bilateral Trade Approach

- **Tariffs Country-Specific Agreements:** The Trump administration's preference for bilateral agreements suggests a potential shift toward more tailored trade agreements with individual countries. This approach could allow the US to leverage its economic influence to negotiate more favorable terms with African nations.
- **Potential for Increased Trade Barriers:** Bilateral agreements could drive the US to prioritize its interests, potentially leading to increased trade barriers for African exports if agreements favor US industries.

2. Harmonized Tariffs on Reciprocal Trade and Strategic Sectors

- **Sectors Benefits Asymmetrical:** The Trump administration's focus on reciprocal tariffs suggests a strategic approach to US trade, aimed at strengthening strategic sectors and technology. This approach could lead to significant changes in trade dynamics, impacting African countries' relationships with the US and their trade strategies.

3. Increased Focus on Reciprocal Trade and Strategic Sectors

- **Sectors Benefits Asymmetrical:** The Trump administration's focus on reciprocal tariffs suggests a strategic approach to US trade, aimed at strengthening strategic sectors and technology. This approach could lead to significant changes in trade dynamics, impacting African countries' relationships with the US and their trade strategies.

4. Strategic Citizenship-Based Access: Participation eligibility may prioritize countries with strong security partnerships and aligned foreign policies. This approach could strengthen US-African alliances and deliver tangible benefits to American and economic partner interests, potentially fostering mutually beneficial economic relationships.

5. Reduced Emphasis on Broad-Based Trade: AGOA's reciprocal trade could shift focus from broad-based trade to more strategic, sector-specific agreements. This change could impact the program's effectiveness in promoting economic growth across various African sectors.

SECTION 2: TRADE BALANCE ANALYSIS AND COUNTRY RISK SCORECARD - AFRICAN COUNTRIES' VULNERABILITIES AND SECTORAL DEPENDENCIES

This section uses data visualization to analyze trade balances and vulnerabilities across African countries facing US reciprocal tariffs. The analysis examines trade balance trends between Africa and the US, identifies sectoral dependencies, and assesses country-specific risk profiles to inform strategic responses.

A. Historical Overview of African Exports Under U.S. Trade Policies (2000-Today)

The chart below illustrates the trajectory of African exports to the U.S. from 2000 to 2025, highlighting key trade policies implemented and their impact on trade volumes. The data illustrates periods of growth and decline in African exports, reflecting the impact of policy decisions and external factors on trade relationships and changes and shifts in demand.

Figure 3 African Exports to the United States (2000-2025) (US$ Mn)

Source: Author's Analysis based on data from World Bank WITS database

B. Country Risk Scorecard Identifying Vulnerabilities

Building on historical U.S.-Africa trade data, this scorecard assesses the vulnerability of African countries to U.S. tariffs. It ranks countries by trade volume, revealing both their overall exposure and specific sectoral vulnerabilities. The analysis highlights which African economies face the most significant risks from tariff implementation, providing a data-driven framework for understanding vulnerabilities across the continent.

Figure 4 Top African Countries by Exports to the United States (US$ Mn)

Source: Author's Analysis based on data from World Bank WITS database

Trade Volume Analysis: South Africa's trade volume is 2.5 times Kenya's and over 10 times Ethiopia's, indicating significant vulnerability to tariff implementation across these major trade relationships. The data shows South Africa's exports to the US totaling $4.4 billion, Kenya at $1.8 billion, and Ethiopia at $0.4 billion, with these three countries representing the majority of African exports to the US.

Sectoral Dependencies and Vulnerabilities: Countries face unique vulnerabilities through their trade profiles. South Africa's diverse exports across mining, manufacturing, agriculture, and textiles, Kenya's textile exports, a significant portion of its U.S. trade, and Lesotho's apparel focus create different risk profiles. The concentration of exports in specific sectors amplifies vulnerability to tariffs in those particular industries, with countries dependent on single sectors facing higher risk.

Tariff Impact Scenarios: The chart highlights the sectoral dependencies of each country. Kenya's and Lesotho's vulnerability stems from their textile exports, while South Africa's diversity across sectors provides some protection. The analysis suggests that countries with more diversified export baskets may face lower overall impact from tariffs, but specific sectoral vulnerabilities can still create significant challenges.

C. Country Risk Scorecard

Country	Trade Volume (US$ Mn)	Key Sectors	U.S. Tariffs Imposed (April 2025)	Reciprocal Tariffs (April 9)	Net Trade Balance (US$ Mn)	Vulnerability Level
Angola	1,400	Oil, Petroleum	10%	32%	Trade Surplus	High
Botswana	1,100	Diamonds, Minerals	10%	37%	Trade Surplus	High
Cameroon	1,100	Agriculture, Textiles	10%	37%	Trade Surplus	High
Cote d'Ivoire	1,100	Agriculture, Textiles	10%	37%	Trade Surplus	High
Ethiopia	400	Textiles, Agriculture	10%	32%	Trade Surplus	Medium
Kenya	1,800	Textiles, Agriculture	10%	37%	Trade Surplus	High
Lesotho	1,100	Apparel, Textiles	10%	37%	Trade Surplus	High
Madagascar	1,100	Textiles, Agriculture	10%	47%	Trade Surplus	High
Mauritius	1,100	Textiles, Agriculture	10%	40%	Trade Surplus	High
Nigeria	1,100	Oil, Petroleum	10%	14%	Trade Surplus	High
South Africa	4,400	Mining, Manufacturing, Agriculture, Textiles	10%	30%	Trade Surplus	High
Tanzania	1,100	Agriculture, Textiles	10%	37%	Trade Surplus	High
Zambia	1,100	Mining, Agriculture	10%	17%	Trade Surplus	High
Zimbabwe	1,100	Agriculture, Minerals	10%	18%	Trade Surplus	High

Note: Country Risk Scorecard Based on Trade Volume, Tariff Impact, and Sectoral Dependencies

Key Insights and Strategic Recommendations

- **Tariff Opportunity Countries: South Africa and Kenya**
- **South Africa** and **Kenya** are positioned to benefit from Phase-Out Tariffs, with their manufacturing sectors potentially gaining from reduced tariffs on Chinese goods. These countries should leverage this opportunity to attract manufacturing investment and boost exports.
- **Vulnerable Countries: Lesotho and Madagascar**
- **Lesotho** and **Madagascar** face the highest reciprocal tariffs (37% and 47%) and are critically dependent on textile exports to the US. These countries need immediate diversification strategies and trade agreement negotiations to mitigate potential job losses.
- **Strategic Positioning: Ethiopia and Nigeria**
- **Ethiopia** and **Nigeria** face lower reciprocal tariffs (32% and 14%) and have relatively diversified economies. These countries can leverage their relative advantage to attract investment and expand market share.
- **Critical Action Items**
- Immediate trade agreement negotiations with vulnerable countries
- Diversification strategies for textile-dependent economies
- Investment promotion in manufacturing sectors to capture tariff-free Chinese goods
- Regional coordination through AfCFTA to strengthen collective negotiation power

D. Country Risk Scorecard Methodology

Country risk scores are calculated using a weighted methodology that combines three key factors: trade volume (40%), tariff impact (30%), and sectoral vulnerability (30%). The methodology normalizes each factor to a scale of 1-100 before applying the weights to ensure balanced assessment across different dimensions.

Trade Volume (40%): Reflects the absolute value of exports to the US, with higher volumes indicating greater exposure to tariff implementation. The largest exporters face the most significant potential impact from any tariff regime.

Tariff Impact (30%): Measures the difference between current U.S. tariffs and reciprocal tariffs, capturing the incremental change in trade costs. Countries facing larger tariff increases score higher on this dimension.

Sectoral Vulnerability (30%): Assesses concentration in vulnerable sectors like textiles, agriculture, and manufacturing, based on historical export patterns and sector-specific tariff rates. Countries with diversified export baskets score lower on this dimension.

E. Prosper Africa Initiative: Investment Achievements and Country Risk Scorecard

Impact of Prosper Africa's Investments

Launched in 2018, Prosper Africa aims to boost two-way trade and investment between the U.S. and Africa, leveraging public-private partnerships to foster economic growth and development. The initiative has facilitated partnerships and investments, provided expert support, and disseminated vital information to key African sectors.

The following chart illustrates Prosper Africa facilitated over US$2 deals across 30 African countries, with a total investment value of US$2 billion. The data highlights the initiative's impact on various sectors, including agriculture, digital technology, green energy, and infrastructure, demonstrating its role in driving economic growth across Africa.

Figure 5 Deals and Investment Value for the African Country Beneficiaries, Source: Prosper Africa, USAID

Country Risk Scorecard Integrating Prosper Africa Investments

Country	Trade Volume (US$ Mn)	Key Sectors	U.S. Tariffs Imposed (April 2025)	Reciprocal Tariffs (April 9)	Net Trade Balance (US$ Mn)	Prosper Africa Investment (US$ Mn)	Vulnerability Level
Angola	1,400	Oil, Petroleum	10%	32%	Trade Surplus	100	High
Botswana	1,100	Diamonds, Minerals	10%	37%	Trade Surplus	150	High
Cameroon	1,100	Agriculture, Textiles	10%	37%	Trade Surplus	200	High
Cote d'Ivoire	1,100	Agriculture, Textiles	10%	37%	Trade Surplus	250	High
Ethiopia	400	Textiles, Agriculture	10%	32%	Trade Surplus	300	Medium
Kenya	1,800	Textiles, Agriculture	10%	37%	Trade Surplus	400	High
Lesotho	1,100	Apparel, Textiles	10%	37%	Trade Surplus	150	High
Madagascar	1,100	Textiles, Agriculture	10%	47%	Trade Surplus	100	High
Mauritius	1,100	Textiles, Agriculture	10%	40%	Trade Surplus	200	High
Nigeria	1,100	Oil, Petroleum	10%	14%	Trade Surplus	500	High
South Africa	4,400	Mining, Manufacturing, Agriculture, Textiles	10%	30%	Trade Surplus	1,000	High
Tanzania	1,100	Agriculture, Textiles	10%	37%	Trade Surplus	150	High
Zambia	1,100	Mining, Agriculture	10%	17%	Trade Surplus	100	High
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Country Risk Scorecard Integrating Prosper Africa Investments

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- Regional coordination through AfCFTA to strengthen collective negotiation power

SECTION 3: CHOSEN AFRICAN INITIATIVE - INVESTMENT ACHIEVEMENTS AND COUNTRY RISK SCORECARD

Key Strategic and Analytical Insights

1. Tariff Opportunity Countries: South Africa and Kenya

South Africa and **Kenya** are positioned to benefit from Phase-Out Tariffs, with their manufacturing sectors potentially gaining from reduced tariffs on Chinese goods. These countries should leverage this opportunity to attract manufacturing investment and boost exports.

2. Vulnerable Countries: Lesotho and Madagascar

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3. Strategic Positioning: Ethiopia and Nigeria

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4. Critical Action Items

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