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AFRICA'S MOMENT TO SHAPE THE GLOBAL ORDER

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Introduction: Key trends driving Africa's global positioning

From pandemic aftershocks to rising debt distress and tightening global liquidity, African economies have undergone significant strain over the past few years. Yet even amidst these challenges, the continent is also outperforming the rest of the world in key areas and is facing promising future trends that will drive profound change.¹ Africa was the fastest growing region in 2025 and home to 11 of the 15 fastest growing economies in the world.² By 2050, one-quarter of the world will be African, and the number of Africans in urban areas will double from 700 million today to 1.4 billion.³ Consumer and business spending on the continent is also expected to reach \$16.1 trillion.⁴

As featured in Figure 21, there are 13 key trends that are reshaping Africa's opportunities to drive sustainable development. However, the continent's ability to harness

these transformative opportunities increasingly depends on how it navigates a complex web of shifting international dynamics: traditional development models are being fundamentally restructured, new partners are offering alternative cooperation models, and official development assistance (ODA) is on the retreat.

A dynamic landscape: Trends reshaping Africa's agency on the global stage

Chief among these dynamics is the tightening of global aid amidst rising need. Eleven countries, accounting for 75% of global ODA in 2024, have announced cuts in the next two years. For the first time since 1995, four countries (France, Germany, the U.K., and the U.S.), who have accounted for almost two-thirds of global ODA over the past decade, have announced funding cuts.⁵

With traditional partners scaling back ODA, new partners are stepping up. Ireland, Korea, and Spain, for example,

1 Landry Signé, *Realizing Africa's Potential: A Journey to Prosperity* (Brookings Institution Press, 2025).

2 British A. Robinson, "The \$2.5 Trillion Opportunity US Investors Can't Access," *Milken Institute*, November 26, 2025.

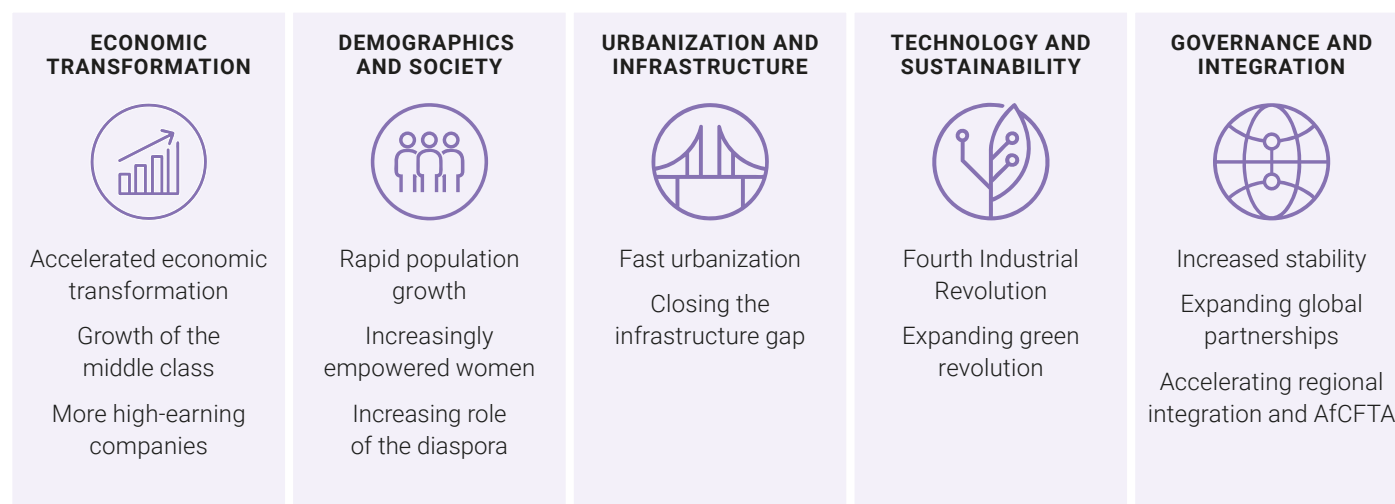
3 Andrew Stanley, "African Century," *Finance & Development*, September 2023; "Africa's Unprecedented Urbanization Is Shifting the Security Landscape," *Africa Center for Strategic Studies*, May 12, 2025.

4 Landry Signé, *Unlocking Africa's Business Potential: Trends, Opportunities, Risks, and Strategies* (Brookings Institution Press, 2020); Signé, *Realizing Africa's Potential*.

5 OECD, *Cuts in Official Development Assistance: OECD Projections for 2025 and the near Term*, OECD Policy Briefs, 26th ed., OECD Policy Briefs (2025).

FIGURE 21

Key trends shaping Africa's opportunities for leadership



Source: Adapted from Signé, *Realizing Africa's Potential*, p. 3.

have announced increases to ODA while Denmark, Norway, and Luxembourg have pledged to maintain their current commitments. The Gulf States have also accelerated their engagement with the continent. The UAE has led with security assistance in sub-Saharan Africa and Qatar has become an active mediator in conflicts including negotiations between Ethiopia and Sudan in 2010 and Rwanda and the DRC in 2025.

Rewriting the playbook: Setting a foundation for African leadership

The potential for African states—and the continent as a whole—to take a leading role in global affairs requires intentional and structural reforms. African governments need to plug persistent gaps in funding, leverage private capital, enhance security and resilience, and focus on implementation.

Mobilize domestic resources: Africa's average tax-to-GDP ratio is 16% (well below the 34% average for OECD countries) but has significant variation. As of 2022, Somalia, Congo, Equatorial Guinea, and Niger have tax-to-GDP ratios below 10%, but Tunisia and Morocco have

managed to reach over 30%.⁶ This gap could potentially be addressed domestically through key levers such as improving tax collection (without harming growth); expanding non-tax revenue; as well as government cost optimization (Figure 22). This is more than sufficient to cover the gap created by retreating ODA. (For a more detailed discussion on strategies to mobilize Africa's own resources for development, see [page 10](#).)

Finance instruments that leverage private capital: A key insight from recent years is that the composition of financing matters more than the headline total. While Africa attracts sizable flows, the mix remains skewed toward grants and traditional loans, rather than mechanisms that mobilize domestic banks, pension funds, and institutional investors at scale. An opportunity exists to shift the mix toward instruments that attract and leverage private capital—such as blended finance facilities, risk-sharing guarantees, and local currency infrastructure funds—and to replicate models already proving effective both on the continent and in peer emerging markets. Local actors in government and civil society will be needed to fill financing gaps and might be better suited to guide such finance towards pressing local priorities.⁷

⁶ Jakkie Cilliers, "The Rising Stakes of Foreign Investment in Africa," *ISS Today*, September 2, 2025.

⁷ Landry Signé, "Development Strategies in a Changing Global Political Economy," in *Development Co-Operation Report 2023: Debating the Aid System*, Development Co-Operation Report (OECD Publishing, 2023).

Some examples include:

- Blended finance platforms that pair ODA/other official flows with development bank guarantees to de-risk local currency lending and extend tenors.
- Pipeline accelerators and technical assistance/ Viability Gap Funding mechanisms that systematically take projects from concept to bankability.
- Regional revolving funds that recycle repayments into new infrastructure and SME financing, compounding the impact of limited concessional capital.

When executed effectively, these vehicles can transform grant dollars into risk capital that attracts domestic and global investors, a critical need in a region where private sector investment and equity remain underutilized.

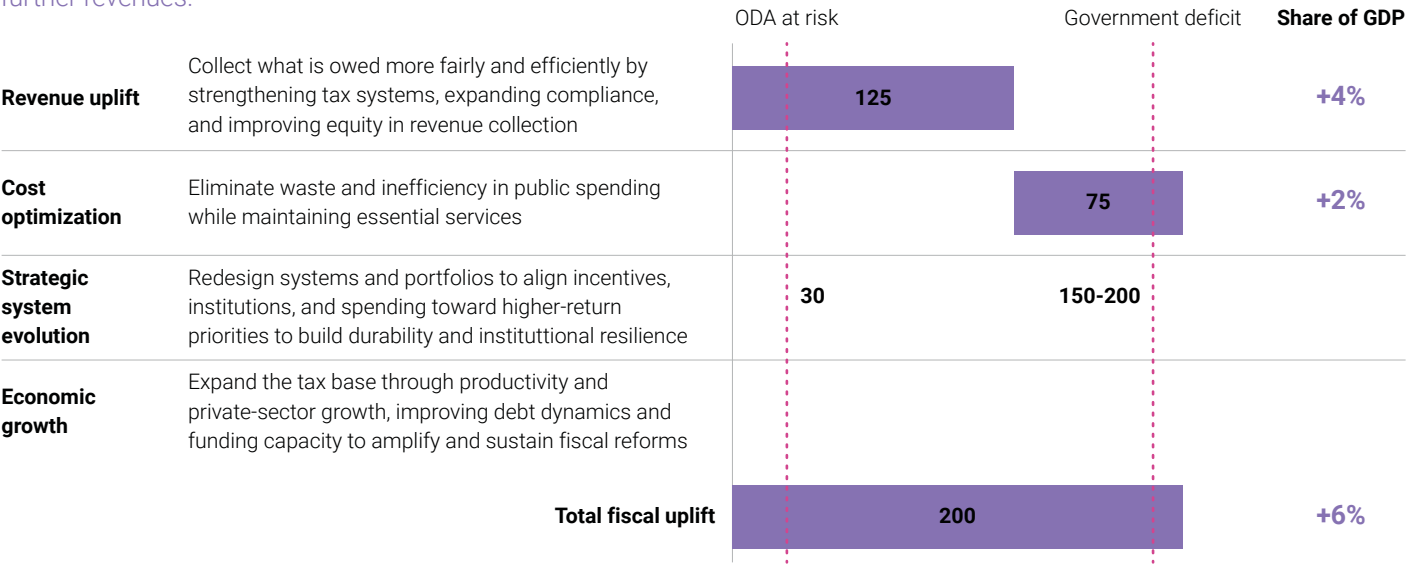
Strengthen regional development and security: Rather than outsourcing security to overseas partners, African

countries can benefit from taking a regional or continental approach to security. In the Sahel, a recent study estimates that a pan-African approach can outperform the EU’s security-development nexus by linking infrastructure and socioeconomic programs to security ones.⁸ Strong regional bodies and pan-African approaches can protect public goods, overcome conflicts, and consolidate peace and human rights.

Move from policy intention to policy implementation: The state of implementation of the 17 Sustainable Development Goals varies across Africa. South Sudan, the Central African Republic, Chad, Somalia, the DRC, and Sudan are at less than 50% implementation, while Mauritius, Morocco, and Algeria are above 70%. Going forward, political will and accountable leadership (across the personal, peer, vertical, horizontal and diagonal levels) will be key to drive implementation.⁹ As discussed in recent reports from the OECD,¹⁰ the Brookings Institution,¹¹ and

FIGURE 22
Potential interventions for sustainable internally generated finance

Resource mobilization and cost optimization can unlock over \$200 billion in near term revenue, raising GDP by 6% and more than offsetting the reduction in ODA. Longer term reforms to redesign systems and grow the economy can secure even further revenues.



Note: First dashed line indicates total ODA at risk by current cuts, dashed line on the right indicates estimated government deficit facing African countries
Source: McKinsey & Company

8 Yasmine Mahssoun, *Beyond Military Responses: An African-Led Approach to Security and Development in the Sahel*, No. 4, IRPIA Policy Brief (Institute for Research and Policy Integration in Africa, 2025)

9 Signé, “Development Strategies in a Changing Global Political Economy.”

10 Signé, “Development Strategies in a Changing Global Political Economy.”

11 Landry Signé, “Turning Policy into Action: Overcoming Policy Failures and Bridging Implementation Gaps,” *Brookings Institution*, January 13, 2025.

the Policy Center for the New South,¹² policymakers can consider policy implementation models for accelerated performance. Matland's ambiguity-conflict model is particularly useful in identifying critical factors for driving implementation in each context, from the community up to the global level.¹³

Opportunities for expanding African leadership

For the continent to take a leadership role in today's global affairs, intentional and structural reforms are required. Below are three key opportunities that African countries should seize in order to make the most of the current moment.

1. Using new partners and new partnership dynamics to Africa's advantage

The growth of South-South cooperation, coupled with renewed diplomatic engagements from both emerging and traditional partners, including from countries such as Australia, Brazil, China, India, Japan, and the U.S.¹⁴ (as evidenced by the increased number of Africa summits and visits in recent years) provides African countries with an opportunity to use this moment to assert their priorities. (For more on emerging global partnerships see [page 106](#).)

Strategize based on the partner: Speaking with a unified voice at the regional or continental level can be incredibly effective to take advantage of the growth in bargaining power that comes with more options in partners. At the same time, and given the current political environment, African nation states could also consider a strategic posture of a transactional approach to open new engagement opportunities. The DRC's minerals for security deal with the U.S. and Somalia's port access proposal with Ethiopia relied on partners' preferences for

For the continent to take a leadership role in today's global affairs, intentional and structural reforms are required.

bilateral, transactional proposals.¹⁵ Countries pursuing such approaches should ensure that their achievements converge with broader regional agendas, working hand in hand with national, regional, and continental officials, while leveraging strong bilateral relationships to also advance broader continental objectives.

Elevating the role of local actors: Local actors like civil society, local government, local authorities, and community groups will inevitably have to step in to fill financing gaps and might actually be better suited to guide financing to the most pressing local priorities, even in partnership with new emerging partners.¹⁶

Consider strategic advantages: The race for critical minerals that power the technologies of the future (including the battery value chain and clean energy technologies) is an example of how strategic advantages can open new avenues for African agency, as new partnerships grow from this demand. As discussed in a recent Brookings brief, African countries can grant themselves the upper hand in such partnerships, including through regulatory and policy reforms.¹⁷

2. A rising global presence for Africa

Africa's growing representation and influence in global institutions create a unique opportunity for coordinated action, one that African countries should seize to shape outcomes for the continent and the world.

Growing influence in global fora: The continent has momentum built from South Africa's leadership of the G20 and the African Union (AU) gaining a seat in this body. At this year's G20 summit, African countries spoke on the need for more fair global finance, establishing an Africa expert panel that will recommend ways to lower borrowing costs and improve the continent's agency in global

¹² Landry Signé, *Policy Implementation – A Synthesis of the Study of Policy Implementation and the Causes of Policy Failure*, PP-17/03 (OCP Policy Center, 2017)

¹³ Signé, *Policy Implementation*, 14.

¹⁴ Signé, "Development Strategies in a Changing Global Political Economy."

¹⁵ Signé, "A New US-Africa Blueprint."

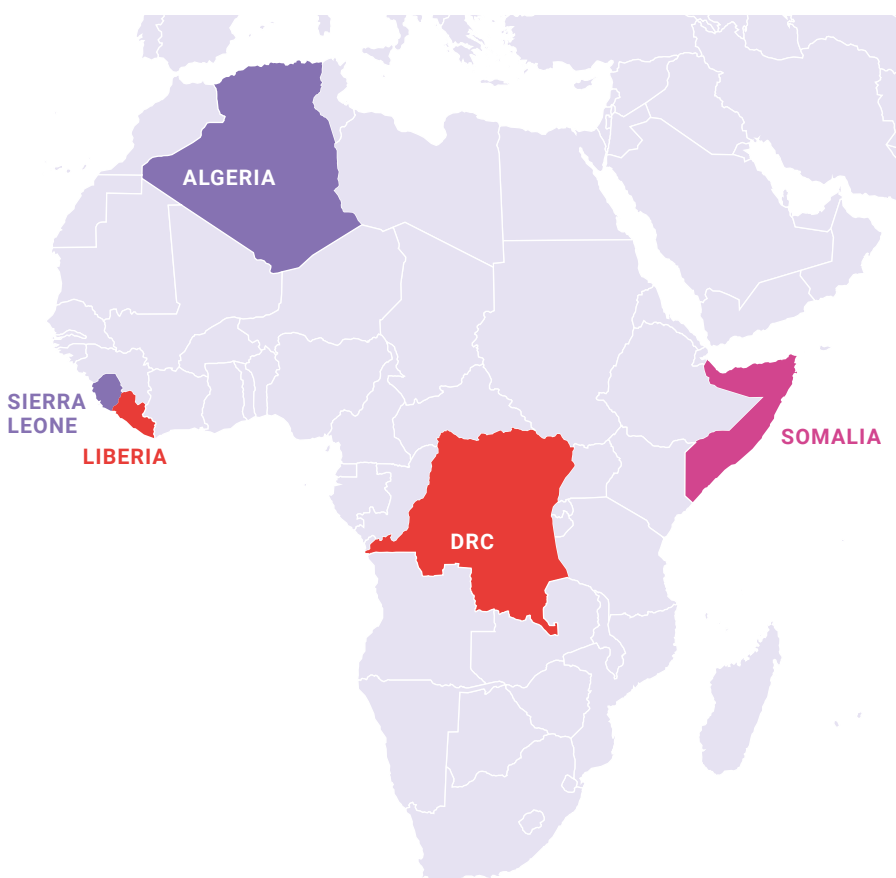
¹⁶ Landry Signé, "Development Strategies in a Changing Global Political Economy," in *Development Co-Operation Report 2023: Debating the Aid System* (OECD Publishing, 2023).

¹⁷ Marit Kitaw and Landry Signé, "What Africa Can Learn from the US-Ukraine Critical Minerals Deal," *Brookings Institution*, September 3, 2025

FIGURE 23

African countries on the UN Security Council

In 2026, the Democratic Republic of the Congo and Liberia will replace Algeria and Sierra Leone as members of the UN Security Council. They join Somalia, which will continue its term until the end of the year. The Africa region is guaranteed three seats on the council.



Note: Since 2011, the "A3" have increasingly worked to present a united front for global diplomacy, recently joining with Caribbean countries like St. Vincent and the Grenadines and Guyana in a bloc called the "A3 plus".

Source: United Nations Security Council 2025

financial governance.¹⁸ At the U.N. Security Council, the A3 (the three African members) have become a coordinated diplomatic coalition via joint statements, joint negotiating blocs, and alignment with the AU. Consequently, the Peace and Security Council has become a vehicle through which African priorities and voices are advanced.¹⁹

African countries should leverage this momentum to advance their objectives, including forging equitable partnerships that prioritize value addition, technology creation, and expanding Africa's voice in global finance, amongst other issues. In the context of fractured commitments to (or mistrust in) multilateralism, continuing to strengthen the coordination of African leadership to reflect priorities of the continent will be critical to drive action on areas like climate change and global financial governance.

3. Leveraging technologies to create innovative partnership opportunities

Many African countries are already leading the way in digital and advanced technology adoption, offering promising pathways for new types of partnerships that can leverage Africa's strengths in entrepreneurship and youth.

Seizing the digital revolution and AI momentum: Africa leads the world in mobile money growth,²⁰ including in Kenya, which reached a 91% mobile money penetration rate in 2025.²¹ Success in mainstreaming mobile money through a strategic blend of regulation, infrastructure, and partnerships means that Africa now has an opportunity to build off this success, including AI-driven financial tools and advanced interoperability frameworks.²²

18 African Union, "Africa Calls for Fairer Global Finance at G20–Africa High-Level Dialogue," *Citizens and Diaspora Directorate*, November 10, 2025.

19 Security Council Report, *From the Margins to the Center: The Rise of the A3 in the UN Security Council*, No. 4 (2025); Faith Mabera, "In a Changing Global Order, Africa Is Embracing Its Agency," *IPi Global Observatory*, October 21, 2025.

20 Rishi Raithatha, "Searching for Mobile Money's Centre of Gravity – Is It Really Kenya?," *GSMA*, November 24, 2025.

21 Stella Nolan, "Kenya Leads the World in Mobile Money Penetration," *Telco Magazine*, September 24, 2025.

22 Nolan, "Kenya Leads the World in Mobile Money Penetration."

The economic opportunity of the Fourth Industrial Revolution (4IR) in Africa is incredibly large.²³ GenAI alone could unlock \$100 billion in Africa, according to a McKinsey analysis,²⁴ while AI overall could double Africa's GDP rate.²⁵

Bridging the AI and digital divide: To ensure that African countries are not left behind as AI and the 4IR advance, policymakers could implement strategies at the national, regional, and continental level, covering both the management of risks and the promotion of innovation, each with clear roles for stakeholders.²⁶ University-private sector partnerships can help anchor AI research and development on the continent, train Africans, and invest in publicly available datasets so African entrepreneurs and innovators can benefit. African policymakers could also focus on investment in cybersecurity, anticipatory regulatory frameworks, and public-private partnerships that could unlock areas where African countries might lead, for example, AI use cases in energy.

Conclusion: Africa's moment to lead

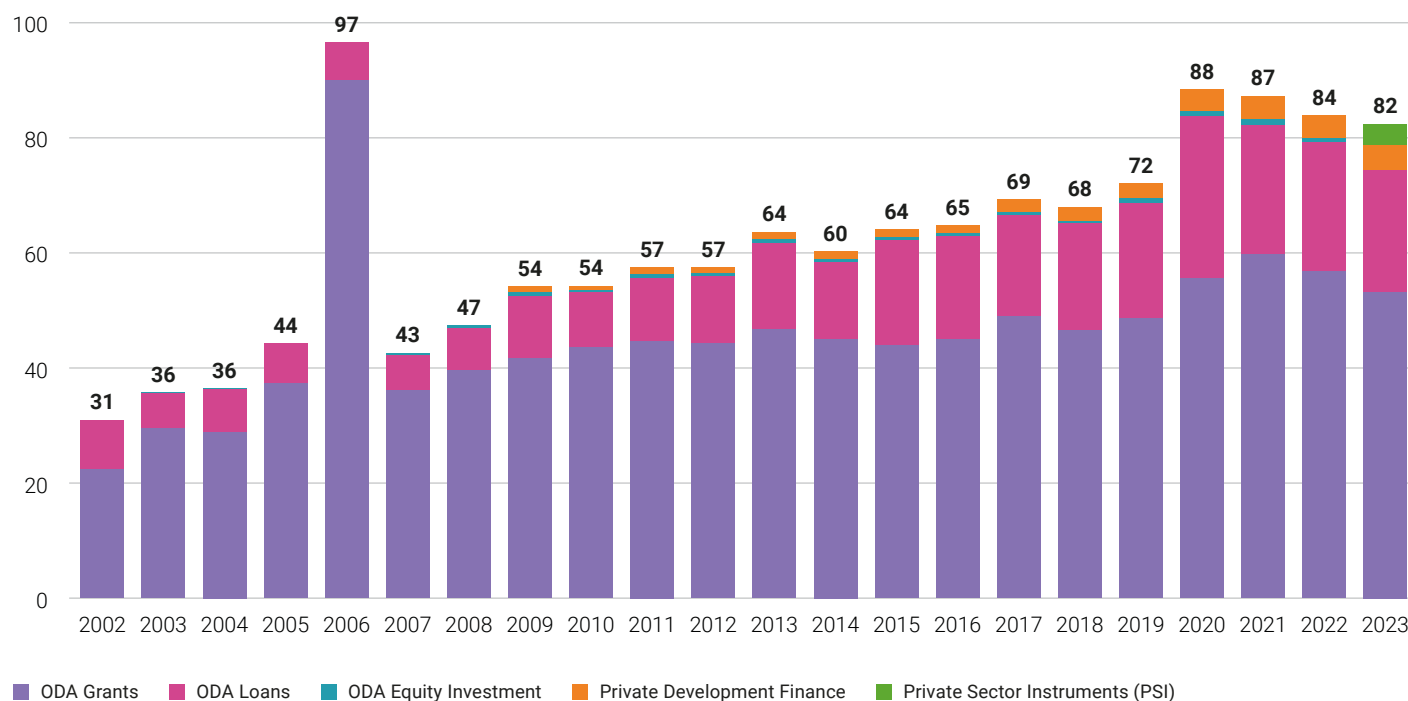
Moving forward, Africa's success will depend on seizing the three opportunities listed above, but with three strategies in mind.

First, diversifying partnership portfolios to reduce overreliance on traditional donors and using the continent's leverage to its advantage. Second, institutionalizing value-addition requirements and technology transfer clauses that ensure partnerships contribute to long-term capacity building. Third, strengthening regional coordination through bodies like the AU and emerging frameworks like the Africa AI Council. African countries must maintain an unwavering focus on sustainable development outcomes and transform this moment of dynamic global power relationships into an opportunity to lead the way.

FIGURE 24

External funding to Africa by financing instrument

The share of funding financed by official development assistance loans and private financing has grown over the past decade



Source: OECD Creditor Reporting System

23 Landry Signé, *Africa's Fourth Industrial Revolution*, 1st ed. (Cambridge University Press, 2023).

24 Mayowa Kuyoro and Umar Bagus, "Leading, Not Lagging: Africa's Gen AI Opportunity," *QuantumBlack AI by McKinsey*, May 12, 2025.

25 Tanvi Deshpande, "Understanding AI for Sustainable Development in Africa," *GSMA*, February 12, 2024

26 Landry Signé, "Leveraging AI and Emerging Technologies to Unlock Africa's Potential," *Brookings Institution*, January 13, 2025

Can Africa benefit from “America First” foreign policy?

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The Donald Trump administration’s “America First” foreign policy, featuring “reciprocal tariffs” and a transactional approach to diplomacy, has redefined U.S.-Africa relations. For African leaders, this presents new challenges in navigating the evolving diplomatic and commercial landscape as they pursue their own strategic interests. Here are some suggestions for accelerating investment-led development with the U.S.

Washington still matters, but so do cities and states.

Partnerships still matter: More than ever, African governments need to deepen the dialogue with their own private sector and the American companies that have invested in their countries and regions. Channels for understanding why U.S. companies are invested in African markets, the challenges they face, and what is necessary to attract others already exist. The U.S. Chamber of Commerce has 18 affiliated entities across Africa and 15 others in development. In June, the Corporate Council on Africa convened more than 2,700 U.S. and African public and private sector leaders in Luanda, Angola for the U.S.-Africa Business summit, resulting in more than \$4 billion in new deals and commitments.¹ Strengthening the dialogue between African governments and the U.S. private sector through these and related organizations is an important step to take.

Sub-national engagement: Washington still matters, but so do cities and states. Many city governments have offices that promote trade with African nations, sister-city relationships, and diaspora affairs. Atlanta, for example, launched Atlanta “Phambili” (Atlanta Forward in Zulu and Xhosa), an initiative that led to a trade mission to South Africa by the city’s political, business, and community leaders.² Other cities such as Washington, New York, Minneapolis, and Philadelphia have offices that focus on African diaspora issues, including trade and investment.

¹ Corporate Council on Africa, “2025 U.S.-Africa Business Summit,” *CNBC Africa*, August 13, 2025.

² U.S. Mission South Africa, “Press Release: Atlanta Mayor Andre Dickens Strengthens U.S.-South Africa Ties during Groundbreaking Official Visit,” *U.S. Embassy and Consulates in South Africa*, December 11, 2024.

Every state has a state-level trade agency that partners with the U.S. Commercial Service and are valuable resources for reaching American investors. In May 2024, the Virginia's Economic Development Partnership led a trade mission to Senegal and Côte d'Ivoire,³ while California sent an economic and climate delegation to Kenya and Nigeria in August 2025.⁴ Strategically engaging city and state governments can generate commercial results for African nations.

Utilizing American content: With the Trump administration wanting to see tangible benefits in its trade deals, combined with efforts to extend the African Growth and Opportunity Act, African governments should consider utilizing American content where possible in exports to the U.S. In April, the Trump administration issued Executive Order 14257, which imposes duties only on the non-U.S. portion of a product, provided at least 20% of the value of that product has U.S. content.⁵ Against this background, a U.S. company, the U.S.-Africa Trade Desk, exported 300 tons of premium-grade cotton from North Carolina to Mauritius in August.⁶ That portion of Mauritian apparel products that are made with this American cotton will enter the U.S. duty free if it accounts for at least 20% of the product. The rest of the product will face a 10% reciprocal duty.

Commercial diplomacy: Under the Trump administration, "U.S. ambassadors in Africa are now being evaluated on how effectively they advocate for U.S. business and the number of deals they facilitate."⁷ This can be invaluable to U.S. companies as they seek to navigate African bureaucracies and business environments. This also creates new opportunities for African leaders and U.S. diplomats to collaborate on attracting investments into priority areas. The recent meeting between President William Ruto and U.S. Chargé d'Affairs Susan Burns in Kenya to discuss trade, security, and technology cooperation is an encouraging reflection of the new emphasis on commercial diplomacy.⁸ Efforts to finalize a Regional Economic Integration Framework between the Rwandan and Congolese governments is similarly important to attracting new investment into a region that has seen little investment from the U.S.⁹

Corridors can be strategic for Africa, too: The Lobito Corridor initiative, started under the Joe Biden administration and continued by Trump, is generating results. Just eleven months after Washington and the European Union launched their

3 Virginia Economic Development Partnership (VEDP) et al., *Exploring Emerging Markets: Senegal & Côte D'Ivoire*, May 2024.

4 "California Forging Climate and Trade Partnerships in Africa," *California State Transportation Agency*, August 22, 2025.

5 Regulating Imports with a Reciprocal Tariff to Rectify Trade Practices That Contribute to Large and Persistent Annual United States Goods Trade Deficits, Executive Order no. 14257 (2025); Kholofelo Kugler and Tani Washington, "How Africa Is Responding to U.S. Tariff Policies," *International Institute for Sustainable Development* (IISD), July 28, 2025.

6 "U.S. – Africa Trade Desk Delivers Landmark Cotton Export to Mauritius," *U.S. Africa Trade Desk*, August 11, 2025.

7 U.S. Embassy Ndjamena, "Launch of Bureau of African Affairs Commercial Diplomacy Strategy," *U.S. Embassy in Chad*, May 15, 2025.

8 Bruhan Makong, "Ruto Discusses Trade, Security and Technology with US Embassy Team," *Capital News*, November 7, 2025.

9 "US Says DR Congo, Rwanda Initial Full Text of Regional Economic Integration Framework," *The New Times*, November 8, 2025.

partnership with the governments of Angola, the DRC, and Zambia, the U.S. was already receiving exports of copper cathodes.¹⁰

Just as importantly, there are expected to be substantial benefits for the estimated six million people who live along the corridor.¹¹ Already, the rehabilitation phase of the rail line has created more than 3,000 jobs, with local content exceeding 60% of the total project value.¹² It is also anticipated that 50,000 smallholder farmers could receive agricultural support programs and digital literacy and financial inclusion initiatives could reach more than 300,000 residents.¹³

Other corridors are likely to be developed that will produce mutual benefits for African nations and the U.S. For example, Liberia's president, Joseph Boakai, recently announced¹⁴ his support for the Liberty Corridor—a \$1.8 billion initiative.¹⁵ Liberia also signed an agreement with the U.S.-owned Ivanhoe Atlantic to upgrade the Yekepa-to-Buchanan rail and port infrastructure, which would have job-creating benefits for Liberia.¹⁶ Additionally, the U.S. reaffirmed its support for a \$500 million Millennium Challenge Compact in Mozambique that will focus in part on transportation infrastructure.¹⁷ Strengthening strategic corridors is consistent with the objectives of the African Continental Free Trade Agreement to facilitate movement of goods across African borders and the priorities of the African Union's Program Infrastructure Development for Africa.¹⁸

The bottom line is that significant potential exists for deepening commercial ties between the U.S. and Africa in this new era of "America First" foreign policy.

Potential exists for deepening commercial ties between the U.S. and Africa in this new era of "America First" foreign policy.

10 The White House, "Joint Statement from the United States and the European Union on Support for Angola, Zambia and the Democratic Republic of the Congo's Commitment to Further Develop the Lobito Corridor and the U.S.-EU Launch of a Greenfield Rail Line Feasibility Study," *Briefing Room*, September 9, 2023; "Copper Exports from DRC to the US Begin via Lobito Atlantic Railway," *MINING.COM*, August 22, 2024.

11 Chris Burns, "Angola Uses the Lobito Corridor as a Vehicle for Investment and Growth," *AfricaNews*, August 13, 2024.

12 John Zadeh, "The Lobito Corridor: Transforming Africa Through Strategic Development," *Discovery Alert*, July 29, 2025.

13 Zadeh, "The Lobito Corridor," July 29, 2025.

14 Abdou Aziz Diédhiou et al., "Why Trump Invited Five African Leaders to the White House," *BBC*, July 9, 2025.

15 "Boakai Reaffirms Liberty Corridor Vision, Positions Liberia as Gateway to the Atlantic for West Africa," *Daily Observer*, July 25, 2025.

16 John Zadeh, "Liberia and Ivanhoe Atlantic Sign \$1.8 Billion Railway Deal," *Discovery Alert*, July 9, 2025.

17 U.S. Embassy Maputo, "The U.S. Government Confirms the Continuation of the Millennium Challenge Corporation Compact in Mozambique," *U.S. Embassy in Mozambique*, September 18, 2025; "Mozambique Connectivity and Coastal Resilience Compact," *Millennium Challenge Corporation*, September 2023.

18 Agreement Establishing the African Continental Free Trade Area (2018), "Program Infrastructure Development for Africa (PIDA)," *African Union*, n.d.

Can zero-tariff policy rebalance China-Africa trade?

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In the summer of 2025, China announced the expansion of its preferential access for African nations, extending its zero-tariff policy for Least Developed Countries (LDCs) to encompass all African countries, except for Eswatini (which still maintains diplomatic relations with Taiwan).¹ The policy eliminates all tariffs on Chinese imports originating from Africa, a measure that—in principle—could deepen economic ties between China and Africa by granting African exports greater access to the Chinese market. However, while the zero-tariff policy appears in favor of increasing African exports to China, the story is not as straightforward.

While the zero-tariff policy appears in favor of increasing African exports to China, the story is not as straightforward.

China's persistent trade surplus: Africa's exports dominated by minerals and raw materials

First, contrary to the conventional belief that China is a primary consumer of African natural resources and should therefore be running a large trade deficit vis-à-vis Africa, China has consistently run a trade surplus with the continent since 2015.

In terms of trade composition, it is indeed true that raw materials and natural resources remain the dominant export from Africa to China. By 2023, China's leading imports from the least developed countries in Africa were mineral resources—about 40% of the total bilateral trade.² These were closely followed by “non-edible materials” and “finished products categorized by raw materials”, which made up 29.2% and 29.7% of Chinese imports from Africa respectively. Despite China's efforts to build Africa's industrial capacity and to assist in the continent's industrialization, Africa's exports to the Chinese market remain concentrated in low-value, primary products.

¹ “China-Africa Changsha Declaration on Upholding Solidarity and Cooperation of the Global South,” *Ministry of Foreign Affairs People's Republic of China*, June 11, 2025.

² China Institute of WTO Studies, *Quantitative Analysis Report on International Economic and Trade Rules*, Issue 8 (University of International Business and Economics, 2024).

TABLE 2

China's trade with Africa (billion USD)

Year	Total trade volume (billion)	Chinese imports from Africa	Chinese exports to Africa	Total trade % change	China's trade surplus
2014 ³	\$221.88	\$115.74	\$106.15		-\$9.59
2015 ⁴	\$179.03	\$70.37	\$108.67	-19%	\$38.30
2016 ⁵	\$149.12	\$56.90	\$92.22	-17%	\$35.32
2017 ⁶	\$169.75	\$75.25	\$94.50	14%	\$19.25
2018 ⁷	\$204.20	\$99.28	\$104.91	20%	\$5.63
2019 ⁸	\$209.02	\$95.80	\$113.21	2%	\$17.41
2020 ⁹	\$186.97	\$72.75	\$114.23	-11%	\$41.48
2021 ¹⁰	\$254.29	\$105.90	\$148.30	36%	\$42.40
2022 ¹¹	\$282	\$117.50	\$164.49	11%	\$46.99
2023 ¹²	\$281.77	\$109.31	\$172.40	0%	\$63.09
2024 ¹³	\$295.27	\$116.80	\$178.47	5%	\$61.67

Source: Compiled by the author. Sources presented in footnotes.

On the continental front, Africa's trade deficit with China is widening. While African exports to China have been increasing, its imports from China have grown even faster, to the extent that the continent collectively runs a \$60 billion deficit vis-à-vis China.¹⁴

3 "In 2014, Trade Volume between China and Africa Exceeded US\$220 Billion for the First Time," *Huanqiu.Com*, January 25, 2015.

4 "In 2015, the Trade Volume between China and Africa Was US\$179 Billion, down 19.2% Year-on-Year.," *Huanqiu.Com*, February 3, 2016.

5 Xiaoyu Li, "2016 Trade Data and Related Rankings between China and African Countries," *Chinafrica*, April 11, 2017.

6 "China-Africa Trade Data | 2017 China-Africa Trade Data and Related Rankings," *China-Africa Friendly Economic and Trade Development Foundation*, February 26, 2018.

7 "The Resilience of China-Africa Economic and Trade Exchanges Highlights and Leads China-Africa Cooperation to Mutual Benefit and Win-Win Results," *Guangming Daily*, May 19, 2022.

8 "Statistics on China-Africa Economic and Trade Cooperation Data in 2019," *Ministry of Commerce of the People's Republic of China*, March 6, 2020.

9 China-Africa Economic and Trade Expo Secretariat, *Report on China-Africa Economic and Trade Relations* (Institute of International Trade and Economic Cooperation of the Ministry of Commerce, 2021).

10 "The Research Institute of the Ministry of Commerce Released the 'Report on Economic and Trade Relations between China and Africa (2023),' " *Ministry of Commerce of the People's Republic of China*, July 10, 2023.

11 "The Research Institute of the Ministry of Commerce Released the 'Report on Economic and Trade Relations between China and Africa (2023).'"

12 "China-Africa Trade Data: 2024 China-Africa Trade Data and Related Rankings," *News.Afrindex.Com*, January 20, 2025.

13 "China-Africa Trade Data: 2024 China-Africa Trade Data and Related Rankings."

14 "China-Africa Trade Data: 2024 China-Africa Trade Data and Related Rankings."

The role of agricultural exports

Trade of agricultural products deserves special attention because China has vowed to support African export of agricultural products. Indeed, to this end, Beijing established a “Green Channel” for African agricultural products to enter the Chinese market in its 2021 FOCAC commitment. The trade facilitation measures removed many of the tariffs as well as simplified customs procedures, including inspection. They have borne some fruit: By 2023, agricultural trade reached \$9.35 billion, a 6.1% increase from the previous year, which is impressive.¹⁵ However, agricultural trade still constituted only 3.3% of total China-Africa trade that year. The focus on natural resources and minerals in China’s imports from Africa has not shifted at all.

Africa’s trade deficit with China is widening. While African exports to China have been increasing, its imports from China have grown even faster.

Improving trade will take more than zero-tariffs alone

In the context of these realities, duty-free access alone does not necessarily change the unbalanced trade picture between China and Africa. On its own, expanding the zero-tariff policy to more African countries does not address the region’s need for economic restructuring, industrial upgrading, and supply chain transformation. Unless the policy facilitates capacity building and long-term economic growth based on industrialization and digitization, a zero-tariff policy may just deepen Africa’s status as the supplier of raw materials.

But the zero-tariff policy does offer a unique opportunity that could have an indirect but long-term impact on Africa’s growth, just not directly and not solely through boosting African exports of raw materials. With China’s zero-tariff policy, Africa could attract new foreign direct investment (FDI) from companies that wish to evade high tariffs elsewhere. For these companies, supply chain adjustment and setting up production or processing centers in Africa could offer another entry point into the Chinese market at a significantly lower tariff cost. That could translate into investment flows into Africa, as well as training and skilling programs for African labor to boost local capacity.

Africa has a long way to go to make use of the potential the zero-tariff policy offers. The policy is not just a way to boost exports, especially exports of raw materials. Instead, it should be treated as an opportunity to optimize resource allocation to improve Africa’s hardware and software infrastructure for structural transformation and long-term growth. A strategic channel could be through Africa’s advantageous position as a low-cost entry into the Chinese market. In the era of global trade war, that is gold.

¹⁵ “Overview of Agricultural Product Trade between China and African Countries in 2023,” *China Chamber of Commerce for Import and Export of Food, Native Produce and Livestock*, n.d.

What does greater global competition mean for Africa?

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There is no clear, detailed African position of a preferred future “global order,” except to note the continent’s shared prioritization of rapid, inclusive economic growth and reform of the U.N. system.¹ That goal presumes a minimum level of global stability and predictability and inevitably suffers from the growing tensions between the U.S., Europe, and China. Perhaps the most coherent statement of African priorities is reflected in Agenda 2063, the African Union’s long-term strategic blueprint for its future with the aspiration for Africa to be a “united and influential partner” in international affairs, rather than a passive recipient of external agendas. That goal presumes deep regional integration, which is now on the cards with the launch of the African Continental Free Trade Agreement (AfCFTA).²

Competition between partners

Previously, during the Cold War, competition between the former Soviet Union and Western countries was a major source of instability in Africa. The balance of power in Europe and elsewhere came at a great cost to countries and regions on the periphery, including those in Southwest Africa and the Horn (Angola and Somalia/Ethiopia in particular). As a result, the years prior to the fall of the Berlin Wall were Africa’s most violent.³ Today, conflict and tensions are again high, with a war in Europe, rising tensions between the U.S. and China, and fracturing transatlantic relations.

The effects of these conflicts are already being felt in Africa. The Russia-Ukraine war has driven up the price of food, fertilizer, and oil for Africa and its trading partners.⁴ Russia has also pursued its war aims against European supporters of Ukraine in Africa by deploying Wagner Group mercenaries (augmented in 2024 by the paramilitary group Africa Corps) to take advantage of disaffection with France and

1 African Union, “Decision on the Reform of the United Nations Security Council Assembly/AU/9(XV),” July 27, 2010, African Union Common Repository.

2 African Union, *Agreement Establishing the African Continental Free Trade Area* (2018).

3 BBC, “Snuffed out Democracies and Poisoned Toothpaste: How the Cold War Wreaked Havoc in Post-Colonial Africa,” *History Extra*, August 19, 2021.

4 Sherilyn Raga et al. (2024). ‘Impact of the Russia–Ukraine war on Africa: policy implications for navigating shocks and building resilience’ ODI Synthesis Report.

domestic security crises.⁵ The costs of rising tension are also evident in other areas, for example the reluctance of some Western partners, such as the U.S., to collaborate with China on connecting the Lobito Corridor with the Chinese refurbishment of the TAZARA railway line, which aims to establish an east-west corridor spanning Southern Africa,⁶ or in the competition between the Kon Kweni deposit, owned by a U.S.-based mining company in Guinea, and the Chinese-owned and run Simandou mine in the same country.

New actors such as the United Arab Emirates and Turkey are also becoming increasingly influential in Africa, but China, Europe, and the U.S. remain Africa's most important development partners. Each brings different advantages to the table, and the ongoing tensions between them are disadvantageous for Africa.

Looking ahead to future relations

For Africa, there will be, ideally, no choice to be made. Europe remains the largest source of investment to Africa, and Africa has a trade surplus with Europe compared to its deficit with China.⁷ (For more on Africa's trade relations with China, see the viewpoint on [page 99](#)).

At the same time, Chinese companies now build the most infrastructure and do so more quickly and cheaply than Western companies,⁸ although the latter often demonstrate higher standards of governance, compliance, and stronger technology and innovation capabilities.⁹ Above all, the U.S. and Europe sit atop a dam of potential investment monies that could improve Africa's prospects.

On the other hand, Africa's trade with China, already the largest with any single country, is set to continue its rapid expansion. It has already grown from \$10 billion in 2000 to \$262 billion in 2023.¹⁰ Using a gravity model, Collin Meisel forecasts that Chinese-African trade will more than triple in value over the next two decades.¹¹ U.S.-Africa trade is also expected to increase, more than doubling, but from a much lower base, thus remaining significantly below Africa's trade with China, the EU, or India in absolute terms. Rather than a deliberate strategy to control Africa and its strategic minerals, the increase in trade with China and India reflects the extent to which the epicenter of the global economy and power is shifting to Asia and away from the North Atlantic, finds Meisel.

Although the Chinese and Indian populations are unlikely to ever attain the average

China, Europe, and the U.S. remain Africa's most important development partners. Each brings different advantages to the table, and the ongoing tensions between them are disadvantageous for Africa.

5 Shaun Walker, "Ukraine Military Intelligence Claims Role in Deadly Wagner Ambush in Mali," *The Guardian*, July 29, 2024; "Mali: Army, Wagner Group Disappear, Execute Fulani Civilians," *Human Rights Watch*, July 22, 2025.

6 Samuel W. Yankee, "China, America, and the Great Railway Race in Africa," *The Diplomat*, March 5, 2025.

7 Alicia García-Herrero, "While Africa's Economic Relations with China Are Hyped, Its Relationship with the EU Is More Favourable," *Bruegel*, July 22, 2024.

8 Jayaram et al., *The Closest Look yet at Chinese Economic Engagement in Africa*.

9 David Dollar, "China's Engagement with Africa: From Natural Resources to Human Resources" (2016), John L. Thornton China Center at Brookings.

10 Elisa Gambino, "Beyond Trade: China Private Capital under Africa Free Trade Area," *Austrian Centre for International Studies*, September 30, 2025.

11 Collin Meisel, Right-sizing Africa's "China challenge", African futures blog, 21 August 2025.

income levels of Americans or Europeans, the current path forecast from the International Futures forecasting platform and others^{12,13} is that the Chinese economy is expected to surpass the U.S. sometime in the mid-2030s. China's economy is already larger in purchasing power parity (PPP) terms, while India is the only other single country with great power potential that could, towards the end of the century, compare with that of China and the U.S.

As much as one can generalize, Africans generally balk at the prospect of a world dominated by either the U.S. or China, or the prospects of a return to the bipolar competition of yesteryear. African citizens' desire for greater influence on the global stage and their favorable views towards competing great power suggest a preference for a multipolar order.¹⁴ To this end, multipolarity cannot just be more of the same. Globalization has ushered in progress through trade and knowledge transfers. But privilege is still ingrained in the current international system through profit shifting and the unbalanced global tax regime.¹⁵ Multipolarity necessitates norms and rules that safeguard the weak against the strong, particularly crucial for a continent comprising 54 mostly small, independent countries.

In a world of slower growth, rising fragmentation and contested power, Africa's freedom of action and development trajectory will be determined by its ability to balance the two elephants in the room, the U.S. and China, and its success in advocating for a rules-based future. Power asymmetries mean that Africans cannot do so alone. The most obvious avenue to explore would be a partnership with the European Union, despite the challenging historical legacies. The material power of the EU is declining, but it brings considerable soft power to the table and evidences the norms and values that democratic Africa aspires to. Articulated in the Constitutive Act establishing the African Union and Agenda 2063, these include good governance, human rights, democratic institutions, and peace as foundations for sustainable development and global influence. Others should join, but this cannot merely be in defense of the current inequitable system. Future systems of global partnership should include reforms that would provide a degree of protection and predictability to balance the current volatility.

Africa's freedom of action and development trajectory will be determined by its ability to balance the two elephants in the room, the U.S. and China.

12 IFs version 8.55, Frederick S Pardee Institute for International Futures, University of Denver.

13 Citigroup Inc., "When Will China's GDP Surpass the US? And What Will It Mean?," Citigroup.com, 2023.

14 "Africa Day: Majority of Africans Say African Countries Should Be given Greater Influence in International Decision-Making Bodies," *Afrobarometer*, May 23, 2025.

15 Krishen Mehta and Thomas Pogge, eds., *Global Tax Fairness*, Oxford Scholarship Online (Oxford University Press, 2016).

