AFRICAN SOCIETY OF ASSOCIATION EXECUTIVES

# Navigating the Contours of Global Protectionism: A Comprehensive Assessment of African Association Strategies Amidst U.S. Tariff Fluctuations

*How African Associations Are Responding to U.S. Tariff Disruption*

*U.S. tariff disruption and the effective collapse of AGOA preferences threaten an estimated 1.3 million jobs across Africa's export industries and have already cut African exports to the United States by 32%. Yet the same shock is catalysing the continent's most significant push toward intra-African integration in a generation. This consolidated report assesses the full tariff landscape, maps the damage and emerging opportunities sector by sector, and sets out a strategic roadmap for AfSAE and its member associations to act as development instruments — not merely as convening communities — in navigating what comes next.*

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# 1: Organisational Profile of AfSAE

The African Society of Association Executives (AfSAE) is the premier professional community for association executives across the continent — a meta-association whose purpose is not to represent a single economic sector, but to strengthen the management profession that underpins sectoral influence in agriculture, manufacturing, minerals, textiles, health, energy, IT and beyond. It was formally constituted at Meetings Africa in Johannesburg in 2015 and registered as a Non-Profit Company in South Africa on 19 February 2016, with its operational headquarters in Nairobi, Kenya and Pretoria, South Africa.

AfSAE's mandate is organised around six strategic pillars: Education, Advocacy, Networking, Strategic Alliances, Leadership, and Social Development. Through these pillars, AfSAE provides a forum for learning and knowledge sharing, influences the legislative and regulatory climate, and connects its membership to global communities of practice. The relevance of this architecture to the current tariff environment is direct: African associations' effectiveness in navigating external trade shocks increasingly depends on executive capability in trade intelligence, scenario planning, coalition management, and policy advocacy — precisely the leadership competencies AfSAE builds.

AfSAE's flagship convening is the Africa Associations Summit (AAS), which has grown from its inaugural edition with over 100 executives from seven countries in Nairobi in October 2019 to its sixth edition (AAS6) in Pretoria in October 2025, where Professor John Molepo of SAAPAM was elected as AfSAE's third president. Summit themes have progressively engaged with major structural forces: AAS5 in 2024 focused on "Leveraging AI and Innovation", while AAS6 tackled "Digital Convergence: Reimagining Associations for Generation Next." In October 2023, AfSAE launched a dedicated webinar series on "The Role of Professional Associations in the AfCFTA", directly linking association management to continental trade facilitation.

AfSAE holds CAE Approved Provider status — linked to the Certified Association Executive ecosystem of the American Society of Association Executives (ASAE) — and delivers the Certificate in Association Management (CAM) programme across multiple African cities. Its training activities have expanded to include workshops in Dar es Salaam, Kampala, Accra, Kigali, and Nairobi. This global standard alignment raises AfSAE's value as a conduit for internationally recognised governance, advocacy, and compliance practice — particularly important when

African associations must engage U.S. institutions and global buyers with high standards expectations.

AfSAE's institutional capacity is reinforced through its relationship with AFAMCO, the African Association Management Company — Africa's first dedicated AMC, co-founded in 2018 as a Kenya-U.S. joint venture bringing the North American AMC model to the continent. AFAMCO developed AfSAE's 2022–2025 Strategic Plan and supports summit coordination and programme delivery. In a tariff-disrupted world, AFAMCO's model of professionalised, outsourced association management is directly relevant: it provides the secretariat depth that most African associations lack for navigating complex external shocks.

### 1.1 AFSAE MEMBERSHIP STRUCTURE

AfSAE's membership is intentionally broad and tiered, spanning individual and institutional categories to serve everything from small national professional bodies to large trade and business associations — the kinds of organisations that become first responders when tariff shocks hit members' export orders and investment decisions. The table below details the primary membership tiers.

| Membership Tier | Annual Fee (USD) | Eligibility & Profile |
|---|---|---|
| Association CEO | USD 100 | Senior-most leaders of national or continental associations |
| Association Executive | USD 50 | Professionals in management or administrative roles |
| Institutional Member | Varies | Trade, professional, or charitable associations |
| Corporate Member | Varies | Businesses and service providers supporting the sector |
| Young Professional | USD 35 | Emerging leaders and early-career association staff |
| Industry Consultant | USD 150 | External advisors and management specialists |
| Affiliate Member | USD 100 | Non-African entities interested in supporting AfSAE |

Core members include regional networks at the intersection of policy and practice, among them the African Biodiversity Network, the African Association of Agricultural Economists (AAAE), the Association of Eastern and Southern Africa Travel Agents (AESATA) and the West African Association for the Development of Artisanal Fisheries (ADEPA) — demonstrating AfSAE's reach from environmental governance to agricultural sovereignty and rural development, all sectors now feeling the ripple effects of shifting U.S. trade policy.

# 2: Awareness and Understanding of U.S. Tariffs

African associations’ “tariff literacy” challenge is not simply knowing a percentage number. It is understanding stacking and interaction effects across multiple legal authorities that operate simultaneously. The post-April 2025 tariff landscape commonly involves baseline MFN tariffs; AGOA preferences (where applicable); additional surcharges (first country-specific “reciprocal” tariffs, then a global Section 122 surcharge); and sector-specific tariffs under Section 232 on metals, aluminium, and vehicles. For association executives advising member firms, failing to understand this stacking is the difference between sound guidance and catastrophically wrong advice.

> *A garment that earned a Lesotho manufacturer duty-free access under AGOA still faced a 50% reciprocal tariff when the Liberation Day order took effect — because AGOA waives only the standard MFN rate of approximately 3.3%, and the larger surcharge sits entirely on top of it. As Lesotho’s Trade Minister stated: “AGOA, in effect, it’s already sort of been scrapped with the tariffs.”*

## 2.1 THE FOUR TARIFF MOVES THAT MOST AFFECTED AFRICAN ASSOCIATIONS

The first and most consequential was the “Liberation Day” Executive Order 14257 of April 2, 2025, which established a universal 10% *ad valorem* tariff on imports from 190 countries, supplemented by country-specific “reciprocal” rates for 57 nations — of which 20 were African. These tariffs were imposed under the International Emergency Economic Powers Act (IEEPA) and were unusually broad in scope, reaching levels that rapidly wiped out price competitiveness for export-dependent industries across the continent. Because AGOA was designed around MFN waivers rather than stacked surcharges, analysts at CSIS described the new tariffs as a structural blow to the entire AGOA model.

The second pivotal development was the change in legal basis in February 2026. The U.S. Supreme Court ruled 6–3 in Learning Resources, Inc. v. Trump that IEEPA does not authorise presidential tariffs. For African associations the effect was not “tariffs are over,” but “the tariff engine has changed.” Within days, the White House invoked Section 122 of the Trade Act of 1974 to impose a temporary 10% global import surcharge, effective February 24, 2026. Section 122 has built-in constraints — short duration and capped rates, with extensions requiring congressional approval — but it also signals that the administration will seek new legal instruments as fast as courts remove old ones. This creates heightened operational uncertainty.

The third impact cluster came from the Section 232 national security tariffs. Steel and aluminium tariffs were raised to 50% in June 2025. A 25% tariff on all foreign-made cars and auto parts took effect in 2025. A 50% tariff on copper and copper derivative products was subsequently imposed. These measures have no country exemptions. For South Africa, whose automotive sector is globally competitive, and for DRC and Zambia, whose copper processing ambitions depend on viable export economics, these tariffs represent structural barriers rather than adjustable policy instruments.

The fourth compounding factor was the AGOA lapse and short reauthorisation. AGOA expired on September 30, 2025. Congress failed to renew it before expiry, creating an investment planning vacuum until February 3, 2026, when Trump signed a one-year retroactive extension through December 31, 2026. Multiple analyses confirm that AGOA's short horizon, combined with the overlaying tariff surcharges, means the programme's practical benefit is now marginal even where legally restored. The short-term extension has done little to restore the long-term investor confidence that AGOA's original 15-year authorisation provided.

## 2.2 COUNTRY-SPECIFIC TARIFF RATES: SELECTED AFRICAN NATIONS

The initial reciprocal tariff rates announced on April 2, 2025, revealed the extent to which the administration's methodology — dividing bilateral trade deficits by total imports and halving the result — disproportionately penalised small, export-dependent African economies. Lesotho, with the highest U.S.-facing tariff of any nation on earth, was collateral damage in an arithmetic exercise that took no account of its development status.

| Country | Initial Reciprocal Rate | Primary Impacted Sector |
|---|---|---|
| Lesotho | 50% → reduced to 15% | Textiles & Clothing — 80% of output shipped to U.S. |
| Madagascar | 47% | Textiles and mineral extraction |
| Mauritius | 40% | Diverse manufacturing and textiles |
| Botswana | 37% | Minerals and manufacturing |
| Angola | 32% | Petroleum and minerals (with exemptions) |
| South Africa | 30% | Automotive, agriculture, steel, and aluminium |
| Libya | 31% | Energy (mostly exempt under Annex II) |
| Tunisia | 25% | General manufacturing |
| Zimbabwe | 18% | General exports |

| | | |
|---|---|---|
| Kenya | 10% (Baseline) | Textiles and agriculture |
| DRC | 11% (Baseline) | Critical minerals — majority exempt under Annex II |

Following a 90-day pause during which all countries reverted to the 10% baseline, country-specific rates were reinstated from August 2025 with some adjustments. Lesotho's rate was reduced from 50% to 15%, though at that level it remained commercially damaging for an industry competing on narrow margins against Kenya and Eswatini at 10%. The Supreme Court's February 2026 ruling then struck down all Liberation Day reciprocal tariffs, replacing them with the Section 122 global 10% surcharge — a partial reprieve, but not a restoration of the pre-2025 status quo.

Critically, strategic exemptions under Annex II of the original executive order carved out over 1,000 products deemed essential to the U.S. economy: petroleum, rare earth metals (samarium, gadolinium, zirconium), platinum group metals, gold, coal, and initially copper. This exemption architecture means that the tariff regime is not uniformly punitive — it is targeted to reshape global supply chains while protecting American access to what Washington regards as strategically indispensable inputs. For associations in the minerals sector, this creates a specific advocacy lever: they can argue "don't tax your own supply security," often with a stronger reception than a general anti-tariff complaint.

# 3: Impact Assessment — Damage and Emerging Opportunities

The impact of U.S. tariff policy on African economies is multi-dimensional and deeply uneven. The largest disruptions concentrate in export sectors where margins are tight and U.S. market share is structurally important — particularly textiles, apparel, and automotive manufacturing — while certain mineral flows are more insulated or have actually surged due to U.S. strategic exemptions and supply chain redirection from China. At the continental level, AGOA exports fell 32% in the year to November 2025, foreign direct investment dropped 42% to $28 billion in the first half of 2025, and an estimated 1.3 million jobs in AGOA-dependent industries face displacement.

### 3.1 SECTORAL PERFORMANCE SUMMARY

| Sector / Country | Export Performance | Primary Driver |
|---|---|---|
| Critical Minerals (DRC) | 860% increase (Apr–Jul 2025) | U.S. strategic exemptions; supply chain redirection away from China |
| Automotive (South Africa) | 73–85% decline in U.S. exports | Stacking of 30% reciprocal + 25% Section 232 tariffs |
| Textiles (Lesotho) | 80% of orders cancelled | Loss of AGOA preference margin and acute buyer uncertainty |
| Citrus Agriculture (SA) | +37.7% (Q2 2025 frontloading) | Orange exemption secured; pre-tariff stockpiling by U.S. buyers |
| Coffee (Burundi) | 97% projected revenue loss | Heavy reliance on a single commodity exported to a single market |
| AGOA Exports (Continent) | 32% decline (year to Nov 2025) | Combined effect of tariff surcharges and AGOA renewal uncertainty |

### 3.2 THE HUMAN COST: TEXTILES AND LESOTHO

The textile and apparel sector — the primary success story of AGOA over 25 years — has absorbed the most concentrated harm. In Lesotho, the industry employs 35,000 to 45,000 workers, predominantly women, and sends approximately 80% of its output to the American market, generating around $230–250 million annually. Following the Liberation Day announcement, U.S. buyers cancelled an estimated 80% of orders. Precious Garments laid off all 4,000 workers. Quantum Apparel retrenched more than half its workforce. Ever Unison

Garments reopened with just 200 of its former 2,000 workers. By late July 2025, 13,000 jobs had been lost and the government declared a two-year state of disaster.

This is what IndustriALL has called a “gendered supply chain shock.” Workers who were primary breadwinners are now seeking sporadic informal shifts or returning to subsistence farming. The competitive disadvantage faced by Lesotho is particularly acute because regional rivals Kenya and Eswatini face only the 10% baseline tariff, prompting manufacturers to consider shifting operations across borders. A garment earning a U.S. buyer $5 in the American market fetches approximately $0.23 in the domestic South African regional market — a stark illustration of why replacing Western markets with local alternatives, however strategically important, is not a simple substitution.

### 3.3 THE AUTOMOTIVE COLLAPSE: SOUTH AFRICA

South Africa’s automotive sector, contributing 22.6% of domestic manufacturing output and supporting over 110,000 formal jobs, has faced a catastrophic contraction. Vehicle exports to the U.S. plunged 73–85% in 2025 before the tariffs formally took full effect in August, as market anticipation alone caused buyers to pull back. The “double-stacking” of a 30% reciprocal tariff on top of the 25% Section 232 vehicle tariff made South African cars commercially unviable in the American market. The Automotive Business Council (naamsa) warned that the erosion of the U.S. export market risks turning industrial hubs like East London into ghost towns. Despite this, South African automakers found sufficient alternative buyers in other markets to achieve record overall exports of 414,268 units in 2025 — a 6% increase — a critically important demonstration that diversification, while painful, can work.

### 3.4 THE CRITICAL MINERALS EXCEPTION AND ITS STRATEGIC LOGIC

In sharp contrast to the manufacturing downturn, mineral-rich nations have experienced significant growth due to strategic exemptions. The DRC witnessed an 860% surge in mineral exports to the United States between April and July 2025, as U.S. firms sought alternative supply chains amidst the broader trade war with China. The U.S. government brokered a Strategic Partnership Agreement with the DRC in December 2025, linking mineral access to governance reforms, and hosted its first Critical Minerals Ministerial (“Project Vault”) in February 2026, announcing a $10–12 billion strategic mineral stockpile. Africa holds approximately 30% of global critical mineral reserves and 32 of the 50 U.S.-designated critical minerals.

However, the strategic challenge is converting mineral endowment into genuine developmental leverage rather than perpetuating extractive dependence. Despite holding 37% of global manganese reserves, South Africa exports approximately 95% of its ore to China for refining. Mali has set an important precedent by securing a deal with Ganfeng Lithium guaranteeing the government a 30% ownership stake plus 5% for local investors. The African Union's African Green Minerals Strategy (2025) and the DRC-Zambia Battery and Electric Vehicle Initiative represent institutional frameworks to move up the value chain — but translating policy into downstream industrial infrastructure will take years of deliberate effort.

### 3.5 FOUR EMERGING OPPORTUNITIES FOR ASSOCIATIONS

The first is the temporary tariff differential versus non-African competitors. The Liberation Day tariffs hit many Asian exporters far more severely than most African nations, creating a window of relative comparative advantage in textiles and light manufacturing. Associations can exploit this by fast-tracking buyer marketing, trade fair presence, and buyer reassurance messaging — framing Africa as the lower-tariff sourcing option.

The second is the retroactive AGOA reinstatement and refund opportunity. The February 2026 reauthorisation is explicitly retroactive, and duties paid during the September–February lapse period may be recoverable through formal customs processes. This creates a concrete association value proposition: running member clinics with customs brokers, standardising documentary checklists, and helping firms capture cash that would otherwise be stranded in administrative complexity.

The third is regional market deepening as a structural hedge. The African Continental Free Trade Area's progressive tariff liberalisation creates expanding intra-continental market opportunities. The Pan-African Payment and Settlement System (PAPSS), now connecting over a dozen central banks, reduces foreign exchange transaction costs by an estimated $5 billion annually, lowering the real cost of intra-African trade. Associations are well positioned to create buyer-matching, standards readiness, and trade facilitation services under this architecture.

The fourth is investment repositioning through the "friendshoring" lens. The U.S. advisory council on doing business in Africa has explicitly recommended promoting investment in AGOA-eligible countries as supply chain solutions for American firms seeking to reduce China dependence. For African associations, this means reframing the continent not as a "tariff victim" but as a “supply chain solution,” and using that narrative to attract investment into processing, compliance systems, logistics infrastructure, and sector compacts.

# 4: Strategic Response and What Support Associations Need

African associations' responses to tariff disruption cluster into three modes: defending market access, re-routing trade, and building resilience capacity. The evidence shows they are already doing all three, but the scale and speed of tariff volatility since April 2025 has exposed a structural gap between what associations are doing and what the moment demands. The most advanced actors — Business Unity South Africa (BUSA), the Citrus Growers' Association of Southern Africa, the Kenya Association of Manufacturers, and the East African Business Council — demonstrate what is achievable when associations have institutional capacity. The challenge is replication at continental scale.

## 4.1 DOCUMENTED ASSOCIATION RESPONSES: THREE MODES IN ACTION

On defending market access, the citrus case is exemplary. The Citrus Growers' Association of Southern Africa publicly called for negotiations and exemptions with a concrete economic argument — South Africa provides essential supply during the U.S. off-season, keeping American consumers' access to fruit available and prices stable. The CGA quantified cost impacts per carton, estimated job losses, and framed the exemption request as beneficial to both countries. It succeeded: an orange exemption was secured. The CGA later welcomed a framework deal with China for tariff-free citrus entry by April 2026 — a direct pivot to South-South diversification as the defensive perimeter extended.

On re-routing trade, the South African government's five-pillar response — continued U.S. engagement, export diversification, an economic response package, trade defence measures, and demand-side interventions — included an innovative "Block Exemption for Exporters," allowing competitors to collaborate on long-term resilience strategies without violating competition law. The naamsa automotive council has advocated for a duty-free quota of 40,000 vehicles per annum, a targeted relief mechanism framed not as special pleading but as a trade stabiliser. The Kenya Association of Manufacturers issued a formal statement on the AGOA extension demanding longer-term planning certainty. The Kenya Private Sector Alliance and the East African Business Council have simultaneously pushed U.S. continuity while expanding partnerships — the dual-track strategy that the tariff environment now requires of all serious associations.

On resilience capacity, the strongest pattern is the rise of "tariff intelligence desks" and rapid guidance notes. Hortgro — South Africa's horticultural industry body — circulated technical notes explaining the post-Supreme Court legal landscape and alternative tariff mechanisms, explicitly anticipating that the tariff architecture would become layered and continue evolving. Wesgro, the Western Cape trade promotion agency, published a live “what tariffs apply now” matrix. These tools exist because members cannot make pricing and shipment decisions based on last quarter’s rules. Most African associations do not yet have this capability.

## 4.2 THE SUPPORT FRAMEWORK MOST NEEDED

From the evidence across all three source analyses, the most effective support for African associations is not a single workshop; it is an operating model. The table below summarises the priority mechanisms, grounded in documented experience from across the continent.

| Support Mechanism | Primary Objective | Targeted Outcome |
|---|---|---|
| Tariff Intelligence & Early-Warning Function | Track Section 122 timelines, Section 232 expansions, Section 301 investigations | Real-time, member-level guidance by product and market |
| Documentation & Claims Support | Monetise retroactive AGOA refunds; improve rules-of-origin compliance | Capture every available preference margin |
| Coalition-Grade Advocacy Capacity | Coordinate cross-sector advocacy bundles (jobs + consumer prices + strategic inputs) | Negotiation-ready narrative with quantified economic impact |
| Technical Assistance Facility (TAF) | SPS compliance, tariff classification, AGOA utilisation for SMEs | Enhanced SME competitiveness in global markets |
| Localisation Support Fund (LSF) | Industrial restructuring for tariff-affected companies | Protection of jobs and productive capacity |
| Investment Packaging (Friendshoring) | Co-design supply-chain propositions with industrial parks and finance pipelines | Position Africa as solution, not victim |
| Digital Trade Integration | E-single windows, PAPSS payment infrastructure, AfCFTA Trade Gateway | Reduce high cost of intra-African trade |

## 4.3 THE ROLE OF AFSAE

AfSAE occupies a structurally unique position. It is not itself a trade association — it does not represent manufacturers, farmers, or miners. What it does is build the institutional capacity of the associations that do. This means AfSAE’s intervention in the tariff disruption is at the level of capability: embedding trade policy literacy, crisis communications, advocacy methodology, and data-driven decision-making into association leadership practice across the continent.

Concretely, this means the following actions are within AfSAE’s direct mandate and institutional capability. First, adding a Trade Policy Navigation module to the CAM curriculum, covering tariff mechanics, rules of origin, WTO frameworks, and AfCFTA provisions. Second, establishing a Trade Policy Working Group within AfSAE’s membership network to develop joint analytical positions, share intelligence, and aggregate advocacy efforts. Third, directing future AAS programming toward a permanent trade policy roundtable stream, connecting member associations with trade ministries and the AfCFTA Secretariat. Fourth, partnering with AFAMCO to develop a standardised “tariff response toolkit” deployable to any trade or professional association facing sector-specific disruption.

The international precedents are instructive. The Vietnam Chamber of Commerce and Industry became the interface between government trade policy and private sector adaptation during the U.S.-China trade war, helping Vietnam’s share of U.S. imports nearly double between 2018 and 2020. The British Chambers of Commerce produced quantified impact analysis — assessing £6 billion in potential costs — that commanded policy attention and media traction at the highest levels. In East Africa, the EABC’s pre-budget consultations with EAC finance ministries resulted in 42 of 46 policy proposals being adopted. These are the models AfSAE’s membership network should be replicating.

# 5: Policy and Advocacy Outlook

The long-term implication of current U.S. tariff trends for African trade and development is structural, not cyclical. UNCTAD describes a "tectonic shift" in global tariff policy, with effective U.S. tariff levels having undergone a step-change upward relative to the pre-2025 baseline. A South African parliamentary trade presentation frames this period as a pivot toward unilateral protectionism, a rise in bilateral transactional deals, and a weakening of predictable multilateral trade rules — conditions under which smaller exporters and preference-dependent industries bear disproportionate planning risk. U.S.-Africa trade has already been in structural decline for two decades: U.S. imports from Africa fell from approximately $68 billion in 2005 to $40 billion in 2023, and the U.S. share of Africa's total exports fell from 36% to roughly 6%. Total U.S.-Africa trade is now approximately one-fifth the size of China-Africa trade.

> *AGOA's one-year extension through December 31, 2026 is best understood as a temporary stabiliser, not a strategic end-state. The short horizon and continuing possibility that new tariff tools will override preference margins mean that associations which plan around AGOA's restoration are making a strategic error. The era of non-reciprocal, duty-free access as the foundation of Africa's U.S. export strategy is over.*

### 5.1 THE AFCFTA AS AFRICA'S STRATEGIC ANCHOR

The most critical long-term strategy for African associations is the deepening of intra-African trade through the AfCFTA. Intra-African trade rebounded 12.4% in 2024 to $220.3 billion, and the AfCFTA's Guided Trade Initiative has expanded from 7 participating countries at its October 2022 launch to 37 of 54 member countries by October 2024. Phase II Protocols on investment, competition policy, and intellectual property rights have been concluded. PAPSS, enabling real-time cross-border payments in local currencies, is now operational across a growing number of central banks. The World Bank projects 32% export growth by 2035 under full AfCFTA implementation, generating cumulative GDP gains of $450 billion.

However, AfCFTA alone cannot fully replace AGOA losses. TRALAC's simulation modelling shows that when netting AGOA expiry impacts against AfCFTA gains, the result remains negative in the medium term. Countries displaced from the U.S. market will find their primary alternative buyers in Europe, China, the Gulf states, and South Asia — not exclusively within Africa. Intra-African trade, at approximately 14–18% of formal trade, remains far below the 60%+ seen in Europe and

Asia. The strategic logic of AfCFTA is not to replace external markets but to build the industrial base, economies of scale, and regional value chains that make African exporters genuinely competitive in any market. The two objectives are complementary, not sequential.

### 5.2 SOUTH-SOUTH DIVERSIFICATION: CHINA, THE EU, AND THE GULF

China-Africa trade reached $348 billion in 2025, growing 17.7% from 2024, and China has been Africa's largest trading partner for 15 consecutive years. President Xi Jinping's February 2026 announcement of zero-tariff treatment for all 53 African countries with diplomatic relations, effective May 1, 2026, provides a significant new market access baseline. However, Africa's trade deficit with China reached $62 billion in 2024 and is widening — Chinese exports to Africa surged 25.8% in 2025 while African exports grew only 5.4%. The structural risk of exchanging one form of dependence for another is real. The strategic question for associations is how to use improved Chinese market access selectively, as part of a genuinely diversified portfolio, rather than as a wholesale AGOA replacement.

The European Union remains Africa's largest collective trading and investment partner, with EU-Africa trade reaching €355 billion in 2024. More than 90% of African exports enter the EU duty-free through Economic Partnership Agreements. The EU's Global Gateway programme aims to mobilise €300 billion in investments by 2027, with half directed toward Africa. At the eighth South Africa-EU Summit in March 2025, a €4.7 billion investment package was announced. Gulf state engagement has also intensified: the GCC announced 73 FDI projects in Africa worth over $53 billion in the most recent reporting period, while UAE-sub-Saharan Africa trade has grown more than 30% over the past decade. India-Africa bilateral trade exceeded $80 billion in 2023–2024. These partnerships do not replace U.S. access, but they reduce the vulnerability created by over-reliance on any single market.

### 5.3 A CAUTIONARY LESSON: THE MOROCCAN FTA EXPERIENCE

Morocco is the only African country with a comprehensive U.S. Free Trade Agreement — and its experience is instructive precisely because it complicates the narrative that bilateral deals are a solution. U.S. imports from Morocco grew faster than Moroccan exports to the U.S. after the agreement's entry into force, leading to a worsening trade balance for Morocco. And when the administration imposed a general 10% tariff in April 2025, it effectively ignored Morocco's pre-existing FTA obligations — demonstrating that bilateral agreements alone do not guarantee protection against unilateral U.S. policy shifts. The lesson is that African associations advocating for bilateral deals must simultaneously press for strong enforcement mechanisms, not merely preferential access on paper.

## 5.4 PRIORITY POLICY ACTIONS FOR AFSAE AND MEMBER ASSOCIATIONS

| Policy Priority | Key Action | Rationale |
| --- | --- | --- |
| Collective Negotiation | Speak with a unified African voice at the AU level | Leverage the continent's rising global economic weight |
| AfCFTA Prioritisation | Institutionalise regional value chains and deepen tariff liberalisation | Reduce exposure to unilateral 'America First' shocks |
| Productive Capacity Building | Strengthen the domestic industrial base and move up value chains | Market access is meaningless without competitiveness |
| Market Diversification | Fully exploit South-South partnerships (China, EU, Gulf, India) | Build stable supply chains with multiple economic partners |
| Mineral Sovereignty Strategy | Convert critical mineral endowment into downstream industrialisation | Leverage, not surrender, Africa's most powerful asset |
| Association Capacity Investment | Embed tariff literacy and policy advocacy into AfSAE's CAM curriculum | Associations become development instruments, not just convening communities |

## 5.5 THREE SCENARIOS FOR AFRICAN TRADE THROUGH 2030

### *5.5.1 Scenario A: Prolonged Exclusion*

AGOA is not renewed beyond 2026, or receives only perfunctory short extensions that provide no investment predictability. Reciprocal tariffs of 10–30% become permanent features. The 1.3 million jobs in AGOA-dependent industries are progressively eliminated. FDI from U.S. sources declines as manufacturing operations relocate to countries with bilateral agreements. AfCFTA implementation stalls under the weight of domestic economic pressures and the “divide and conquer” bilateral deal dynamic. Evidence supporting this scenario is not trivial: the administration’s language toward AGOA, the absence of negotiation pathways for most African countries, and the willingness to impose the world’s highest tariff on one of its poorest nations all point in this direction.

### *5.5.2 Scenario B: Managed Diversification*

Congress achieves a further AGOA extension of three to five years while Kenya and South Africa conclude bilateral arrangements that provide a partial framework for others. African exporters redirect progressively toward EU markets, Chinese zero-tariff access, and Gulf state partnerships. South Africa's automotive experience — achieving record overall exports despite a 75-80% U.S. collapse — becomes the template for sector-level adaptation. AfCFTA implementation proceeds incrementally, reaching meaningful tariff liberalisation by the late 2020s. Bipartisan congressional support for AGOA, the EU's deepening commitment, and the demonstrated resilience of diversified exporters all support this trajectory.

#### *5.5.3 Scenario C: Accelerated Integration and Genuine Resilience*

U.S. tariff disruption becomes the catalyst that Africa's integration project needed, forcing political will that two decades of incremental negotiation could not generate. PAPSS achieves continental coverage. The AfCFTA's Guided Trade Initiative reaches all 54 member states. Critical mineral leverage is deployed for downstream industrialisation rather than raw export. Intra-African trade doubles toward 30% of formal trade within a decade. The World Bank's projection of 32% export growth by 2035 and the UNECA's estimate of $450 billion in cumulative GDP gains are realised. AfCFTA Secretary-General Mene's framing captures the energy this scenario requires: "Donald Trump is doing what Donald Trump is doing for the U.S. We have to do what we have to do for our continent."

The most probable trajectory lies between Scenarios B and C. Its realisation depends substantially on institutional capacity — of governments to negotiate effectively, of regional bodies to coordinate coherently, and of associations to mobilise their members and influence policy. This is precisely where AfSAE's mandate intersects with the continent's most pressing economic challenge.

# Conclusion:

This report has documented a trade disruption of historic proportions and an institutional response that, while emerging across the continent, remains insufficient to the scale and speed of the challenge. Three conclusions stand above the analytical detail.

**First**, the era of non-reciprocal U.S. trade preferences as the foundation of Africa's export strategy is over. Even in the most optimistic scenario for AGOA renewal, the programme will operate under tariff overrides and political conditionalities that fundamentally erode its value.

African associations oriented primarily toward restoring AGOA are pursuing a diminishing return. The strategic priority must shift to AfCFTA implementation, credible market diversification, and leveraging Africa's critical mineral endowment for industrialisation rather than raw extraction.

**Second**, associations are the missing link in Africa's trade policy ecosystem. Governments negotiate agreements; international organisations provide technical assistance; but associations — the bodies that represent the firms, farmers, and professionals who actually trade — remain under-resourced, under-informed, and under-connected to both the policy processes and the digital tools that could amplify their impact. The evidence from BUSA, the CGA, the EABC, and the KAM is clear: when associations have institutional capacity, they convert member pain into negotiation-ready narratives with numbers, jobs, and consumer impacts — and they win exemptions, influence budgets, and attract investment. These models need systematic replication.

**Third**, AfSAE is uniquely positioned to drive that replication — but only if it moves beyond professional development into economic policy engagement. The October 2023 AfCFTA webinar series was the right instinct. Scaling that instinct into a permanent programme, embedded in the CAM curriculum, operationalised through regional roundtables, supported by AFAMCO's management infrastructure, and connected to the AfCFTA's digital platforms, would position AfSAE not merely as a convening body but as a strategic instrument for African economic resilience.

> *AGOA's current extension expires on 31 December 2026. China's zero-tariff regime for Africa takes effect on 1 May 2026. The Section 122 surcharge expires in July 2026. AfCFTA's target for 90% tariff liberalisation is 2030. Each of these dates is a window — for negotiation, for adaptation, or for loss. Whether African associations are*

> *positioned to influence what happens at each window depends on decisions made now.*

The trade order that sustained Africa's U.S. market access for 25 years was built by deliberate institutional action. The trade order that replaces it will be too. Associations that are professionalised, data-equipped, connected, and policy-literate are how African economies navigate what comes next. That is AfSAE's mandate. This is the moment it matters most.

## Sources and Methodology:

This report synthesises research and analysis from three independent assessments produced between July 2025 to March 2026, drawing on primary data and commentary from the World Bank, UN Conference on Trade and Development (UNCTAD), African Development Bank (AfDB), African Union Commission (AUC), United Nations Economic Commission for Africa (UNECA), International Trade Centre (ITC), Brookings Institution, The Center for Strategic and International Studies (CSIS), Carnegie Endowment for International Peace (CEIP), TRALAC Trade Law Centre, Afreximbank, The Automotive Business Council (naamsa), the Citrus Growers' Association of Southern Africa (CGA) , the Kenya Association of Manufacturers (KAM), the East African Business Council (EABC), Business Unity South Africa (BUSA), the South African Department of Trade Industry and Competition, Wesgro, Hortgro, the U.S. Congressional Research Service, U.S. Customs and Border Protection, the Office of the U.S. Trade Representative, and the International Institute for Sustainable Development (IISD). The tariff landscape described reflects the position as of July 2025 to March 2026, and is subject to ongoing change given the pace of U.S. trade policy evolution.

# GLOSSARY

1. **AfCFTA (African Continental Free Trade Area)** — A continent-wide free trade agreement signed by 54 African countries, with the long-term goal of creating a single African market of 1.4 billion people. It aims to eliminate tariffs on 90% of goods traded between African countries, reduce non-tariff barriers, and build regional value chains.
2. **AGOA (African Growth and Opportunity Act)** — A U.S. law originally passed in 2000 that gave eligible sub-Saharan African countries the right to export thousands of products to the United States without paying import taxes (duties).
3. **Association Management Company (AMC)** — A professional firm that provides full secretariat and management services to associations that don't have or can't afford their own permanent staff.
4. **AFAMCO — African Association Management Company** — is the first AMC of this kind on the African continent.
5. **Bilateral Trade Agreement** — A trade deal negotiated directly between two countries, as opposed to a multilateral arrangement involving many countries.
6. **BUSA (Business Unity South Africa)** — The apex organised business body in South Africa, representing the private sector in engagements with government, labour, and international institutions.
7. **CAM (Certificate in Association Management)** — AfSAE's planned flagship professional training programme, delivered under licence from the American Society of Association Executives (ASAE). It equips association executives with governance, member engagement, financial management, communications, and advocacy skills.
8. **Critical Minerals** — A category of minerals that governments designate as strategically essential to national security and economic competitiveness, particularly for clean energy technology, defence, and electronics.
9. **FDI (Foreign Direct Investment)** — Investment made by a company or individual in one country into business interests in another country — for example, building a factory, buying a majority stake in a local company, or establishing a wholly owned subsidiary.
10. **FOCAC (Forum on China-Africa Cooperation)** — The main multilateral platform through which China manages its economic and diplomatic engagement with Africa. It meets every three years at the level of heads of state.

11. **Friendshoring** — A relatively new trade strategy concept where countries and companies deliberately redirect supply chains toward allied or geopolitically friendly partners, rather than purely optimising for cost.
12. **Gendered Supply Chain Shock** — A term used in the report to describe the disproportionate impact on women workers when export industries collapse.
13. **IEEPA (International Emergency Economic Powers Act)** — The U.S. law the Trump administration originally used to justify the Liberation Day tariffs. It gives the President broad powers to regulate international commerce during a declared national emergency.
14. **Intra-African Trade** — Trade that happens between African countries, as opposed to trade between Africa and the rest of the world.
15. **Liberation Day Tariffs** — The informal name for the sweeping tariffs announced by President Trump on April 2, 2025, via Executive Order 14257. They imposed a universal 10% tariff on all imports into the United States, plus much higher country-specific rates for 57 nations.
16. **MFN Tariff (Most Favoured Nation Tariff)** — The standard import tax rate that the U.S. charges on goods from countries it trades with normally, without any special deal in place.
17. **NEDLAC (National Economic Development and Labour Council)** — South Africa's statutory body where government, business, labour, and community groups negotiate on economic and labour policy.
18. **Non-Tariff Barriers (NTBs)** — Trade obstacles that are not import taxes but still make it harder or more expensive to sell goods across borders. Examples include complex customs procedures, inconsistent product safety standards, lengthy border inspections, and port inefficiencies.
19. **PAPSS (Pan-African Payment and Settlement System)** — A payment infrastructure that allows businesses in different African countries to pay each other in their own local currencies, bypassing the need to convert into U.S. dollars first.
20. **Reciprocal Tariff** — A tariff that one country imposes in response to, or in proportion to, what it perceives as unfair trade practices or imbalances by another country.
21. **Rules of Origin** — The criteria used to determine the "nationality" of a product — in other words, where it was genuinely made.
22. **Section 122 Tariff** — A temporary import surcharge the U.S. President can impose under the Trade Act of 1974 to address a fundamental imbalance in international payments.

23. **Section 232 Tariffs** — Tariffs imposed by the U.S. government under Section 232 of the Trade Expansion Act, which allows the President to restrict imports if they are deemed a threat to national security.
24. **Tariff Stacking** — One of the most important concepts in the report. It refers to the layering of multiple tariffs on top of each other on the same product. For example, a South African car exported to the U.S. might face the standard MFN tariff, plus a 25% Section 232 automotive tariff, plus a 30% reciprocal tariff — all simultaneously.
25. **TRALAC (Trade Law Centre)** — A South Africa-based research organisation specialising in African trade law and policy.