DEVELOPMENT REIMAGINED

REPORT:

AFRICA-US STATE OF PLAY

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Acknowledgements

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Executive Summary

U.S.–Africa relations are at a critical inflection point, shaped by shifting geopolitical priorities, declining development aid, and intensifying great power competition. Historically, U.S. engagement with Africa has been driven less by African priorities than by American strategic interests—first during the Cold War, later through aid and development initiatives, and now through geopolitical competition.

The second Trump administration has recalibrated official U.S.-Africa policy. This includes cutting foreign assistance, letting AGOA to expire, reducing participation in multilateral platforms, and prioritising bilateral, transactional commercial relationships. The result is a reduced multilateral footprint and a sharper focus on U.S. national security and commercial interests, particularly in energy, migration control, and critical minerals. This shift comes at a time when U.S.-Africa engagement was starting to pick up again under the Biden administration after years of decline post the Great Financial Crisis.

U.S.–Africa trade grew from US$38 billion in 2000 to US$72 billion in 2024, but remains narrow and concentrated in a handful of countries and commodities. The expiration of AGOA—once a cornerstone of U.S. trade with Africa—marks a significant shift toward private investment and bilateral deals. U.S. FDI has increased but still lags behind other major partners, especially China and the EU. ODA reached US$15.9 billion in 2024 but faces steep reductions under Trump 2.0.

While historically limited in infrastructure finance, the U.S. is selectively expanding investments through targeted projects like the Lobito Corridor under the Partnership for Global Infrastructure (PGI). Strategic minerals such as cobalt, platinum, and rhodium are now central to U.S. policy—but U.S. trade legislation (e.g., the Inflation Reduction Act) excludes most African countries from value-chain participation. At the same time, climate finance remains marginal—less than 2% of U.S. ODA.

Health cooperation remains a key pillar through PEPFAR, CDC programs, and Power Africa, particularly in HIV/AIDS and malaria control. Agricultural engagement, anchored in Feed the Future and food security initiatives, remains highly dependent on aid flows now under threat.

People-to-people ties remain strong through education, cultural exchange, and entrepreneurship programs. Over 64,000 African students studied in the U.S. in 2024. However, diaspora engagement structures have weakened following the disbanding of formal advisory bodies.

Security cooperation continues to be a defining feature of U.S.–Africa relations. AFRICOM and counterterrorism operations remain robust in the Sahel, Horn of Africa, and maritime zones, though aid cuts threaten governance and stabilisation programs that support long-term security.

The U.S.–Africa relationship is transitioning from an aid-centered model to a more transactional, strategic partnership. This creates both risks—particularly for health, agriculture, and climate sectors—and opportunities for greater African agency. African states can leverage this moment to negotiate more equitable partnerships, diversify alliances, and strengthen their influence on the global stage.

Chapter 1: Introduction

Africa has historically been a low priority on the foreign policy agenda of the United States of America. Over the past three decades, this fact has been masked by the relative stability of U.S. policy towards Africa, undergirded by bipartisan support. During this time, U.S.-Africa relations have been given a public face of foreign aid flows to African countries, reflecting the view in Washington of Africa as a place of need. The predominance of foreign assistance has provided sufficient cover for the pursuit of U.S. commercial interests in the background, particularly in the natural resources sector.

Recently, however, the continent has become a subject of renewed interest in Washington against the backdrop of tectonic geopolitical transformations. Accordingly, official U.S. policy towards Africa has shifted to reflect the times. For instance, the U.S.-Africa strategy released by the Biden administration in 2022 sought "to graduate from policies that inadvertently treat sub-Saharan Africa as a world apart and have struggled to keep pace with the profound transformations across the continent and the world." As yet another signal of Africa's renewed strategic importance in Washington, the Trump administration announced a new six-point commercial diplomacy strategy for Africa signalling a shift away from aid towards trade as part of a broader reorientation of U.S. foreign policy.

This pivot in official U.S.-Africa policy, initiated under the first Trump administration and carried forward by both the Biden and second Trump administrations, still seeks to consolidate U.S. interests in Africa and counterbalance geopolitical competitors on the continent. Although the second Trump administration is yet to formally release its Africa strategy, we can surmise from actions taken towards Africa thus far by the administration, such as the drastic reduction in foreign assistance, of which Africa had been a major beneficiary, that the basic thrust of U.S.-Africa relations will continue to be maintaining U.S. interests.

Although underlying drivers may remain the same, the renewed interest and shift in official U.S. policy toward Africa mark a watershed moment in U.S.–Africa relations, warranting an evaluation of this relationship. As the U.S. works to secure new and old interests in Africa, African countries must also strategically re-examine this relationship to determine how to respond and secure Africa's interests within the changing strategic environment. It is hoped that such a reevaluation will enable African countries to actively contribute to reshaping their relations with the U.S. so that African priorities are centered on the agenda for a more balanced partnership—in contrast to the current status quo that is driven mainly by U.S. interests.

This report aims to contribute to this effort by examining the evolution of U.S.–Africa relations over the past two and a half decades. The analysis focuses on six key areas of cooperation: trade, investment, infrastructure, health and agriculture, people-to-people exchange, and peace and security. For each area of cooperation, the report describes past trends, reviews current dynamics, discusses flagship initiatives, and tracks progress on past commitments. Ultimately, the report seeks to support African stakeholders in devising strategies to secure Africa's interests vis-à-vis the U.S. through an understanding of its past evolution. The report draws on secondary sources as well as Development Reimagined's own tracking of progress on commitments made at the previous U.S.–Africa Leaders' Summit held in December 2022.

1.1 Background

U.S.-Africa engagement is driven by the respective interests of both sides. That is, both the U.S. and African countries seek to advance certain interests through this relationship. However, U.S. interests dominate the relationship due to the relative strength and influence of the U.S. African countries seek to advance economic development to improve the livelihoods of their people through trade and investment cooperation, among other channels.

On the U.S. side, we can identify two main drivers of interest in Africa. First is the national security agenda, which seeks to ensure the physical security of the U.S. homeland, the well-being and prosperity of U.S. citizens, as well as the preservation and perpetuation of U.S. society. Much of this can be achieved through the engagement of the American private sector on the continent. Second is the values-based agenda, through which the U.S. seeks to promote its national values abroad—such as democracy, human rights, and free-market enterprise—including as a means to ensure openness to U.S. private-sector activity. The values-based agenda also reflects how U.S. leaders view America's role in the world. The determination of which key driver takes precedence depends on several factors, including domestic politics, the international environment, and the personality of the presidential office-bearer. Indeed, these two key policy drivers can at times appear to conflict with each other.

Based on the alternation between these key drivers of U.S.–Africa policy, there are three identifiable—and distinguishable—recent historical periods in U.S.–Africa cooperation. Diplomatic relations between the U.S. and independent African states formally began in the mid-20th century but took on greater significance in 1958 with the establishment of the Bureau of African Affairs by then U.S. President Dwight Eisenhower to coordinate U.S. policy on Africa within the Department of State. This marks the first historical period in U.S.–Africa relations.

During this period, U.S. Africa policy, to the extent that it existed, sought to counterbalance Soviet influence in Africa. The key driver of U.S. engagement in Africa was its national security interests in the context of the Cold War. As such, the U.S. was willing to support non-democratic regimes in certain African countries if the leaders of those regimes pledged allegiance to the Western bloc led by the U.S. To achieve its aims, the U.S. relied heavily on aid flows to draw African leaders—many of whom professed socialist leanings during this period—away from the Soviet sphere of influence. Meanwhile, fresh off the heels of independence, African countries sought to partner with the world's pre-eminent power to consolidate the gains and achieve the promise of their newly regained independence. Indeed, many African nations were keen to work with global institutions such as the UN, the World Bank, and the IMF for technical assistance and to borrow for infrastructure and industrial development. These institutions were not only based in the U.S.—the U.S. also dominated their executive decision-making structures—and was able to achieve outcomes such as the global dominance of the U.S. dollar through them.

After the end of the Cold War, U.S.-Africa policy faced somewhat of an existential crisis as its raison d'être had disappeared.[1] Meanwhile, African nations were facing rising debt costs as interest rates increased—a direct result of the oil price shocks a decade earlier—and independence leaders found themselves unable to pursue infrastructural and industrial development successfully. In these

[1] Tieku, T. K. (2012). *U.S.–Africa relations in the age of Obama*. Ithaca, NY: Institute for African Development, Cornell University. Access here.

circumstances, the U.S. decided to make the values-based agenda take precedence as the key driver of U.S. engagement in Africa. This marked the second historical period in the relationship.

The Clinton administration became the first U.S. administration to formally release a U.S.–Africa strategy. Across the continent during this period, the Clinton administration sought to promote U.S. values of democracy and free-market enterprise. In addition, humanitarian assistance to alleviate poverty, hunger, disease, and illiteracy emerged as an important element of U.S.–Africa policy. Faced with few other options for international partnerships, African countries sought to work with the U.S., among other partners, to usher in a new, democratic, and directly developmental dispensation (i.e., versus a previous dispensation of development indirectly via structural transformation). A range of organisations, including the U.S.-dominated IMF and World Bank, accelerated such reforms through "Structural Adjustment Programs" in exchange for debt relief through HIPC and MDRI.

Notably, the coincidence between the U.S. agenda of free-market enterprise and growing calls by international organisations and many African leaders for development—along with an emphasis on private-sector-driven growth (FDI) to avoid mounting debt—resulted in the establishment of the African Growth and Opportunity Act (AGOA) in 2000, which granted African goods duty-free access to the U.S. market.[2]

The Bush administration built on and expanded the type of U.S. engagement in Africa started under the Clinton administration. The events of 9/11 and America's subsequent "war on terror" led to a deepening within U.S. leadership of the theory around the relationship between development, governance, and security, given that extremist groups were gaining a foothold in what was referred to as "vast ungoverned spaces" in Africa—particularly in Somalia and the Sahel.[3] During this period, U.S. national interests coincided with the values-based agenda, leading to a significant expansion of U.S. engagement in Africa. This resulted in large aid flows to fund new initiatives and programs established by the Bush administration, including the President's Emergency Plan for AIDS Relief (PEPFAR) and the Millennium Challenge Corporation (MCC). The Bush administration also consolidated U.S. military engagement in Africa through the establishment of the U.S. Africa Command (AFRICOM).

The massive influx of Official Development Assistance (ODA) to fund the flurry of foreign aid programs launched under the Bush administration at the turn of the century laid the foundation for the official U.S.–Africa relationship throughout much of the first two decades of the century.

Preoccupied with a severe economic crisis at home, the Obama administration did not seek to transform U.S. Africa policy in a fundamental way.[4] While maintaining the health and development programs established under the Bush administration, the Obama administration pursued a relatively low-input values-based agenda, emphasizing the promotion of good institutions through the first-ever U.S.–Africa Leaders' Summit; training of future African leaders through the Young African Leaders Initiative (YALI); poverty alleviation through Power Africa; and promotion of food security through the Feed the Future program under USAID. Though laudable, these initiatives mostly flew under the radar

[2] This is an important point. AGOA should not necessarily be seen as a policy introduced to pivot from aid to trade (as it is now promoted) but as a tool for encouraging American firms to go out to Africa and sell back into the U.S.
[3] Cooke, J. G. (2013). *"De Clinton à Obama, les États-Unis et l'Afrique." Politique étrangère*, 78(2), 67-79. Paris: Institut français des relations internationales. Access here.
[4] Ibid.

given the dire straits of the global economy, creating the impression of a U.S. retreat from Africa during this period.[5]

The third identifiable period in U.S.-Africa policy can be traced to the first Trump administration (2016-2020), which was the first to fully and formally articulate U.S. engagement in Africa in terms of geopolitical competition between the U.S. and China.[6] During the Trump administration, the national security agenda took precedence over the values-based agenda. To counter China's expansive role in Africa, the Trump administration focused on expanding U.S. economic engagement on the continent. President Trump signed the BUILD Act in 2018 which established the U.S. International Development Finance Corporation (DFC), for which Africa has been a priority region.[7] Prosper Africa was also established under the Trump administration to promote U.S. access to African markets and to increase two-way trade between the U.S. and African countries.

By and large, the Biden administration maintained and built upon the approach taken by the Trump administration while couching the pursuit of core U.S. national security interests in the language of the values-based agenda.[8] In perhaps a more pronounced way than even the first Trump administration, the Biden administration oriented U.S. Africa policy to counterbalance China's expansive and growing role on the continent. The administration unleashed a diplomatic charm offensive by reviving the U.S.–Africa Leaders' Summit, which had stalled under the first Trump administration, and by rapidly mobilising funds for the Lobito Corridor railway to counter China's Belt and Road Initiative. With a second Trump administration now in motion, the basic direction and momentum of this third historical period are expected to continue—i.e., the centering of core U.S. national interests.

Until January 2025, when President Trump returned to the White House, formal U.S.–Africa relations had been driven primarily by ODA, particularly in the health and agriculture sectors. Previous administrations had largely maintained this approach owing to broad bipartisan consensus in Washington on U.S. policy toward Africa. As a consequence of the predominance of ODA in U.S.–Africa engagement, the relationship remained paternalistic. Under the second Trump administration, the predominance of ODA has been significantly reduced, and the administration is attempting to recast U.S.–Africa relations toward greater commercial engagement. This shift presents both opportunities and challenges.

1.2 Trump 2.0

As with the first Trump administration, the second has once again brought to the public fore U.S. interests vis-à-vis Africa as part of the "*America First*" foreign policy agenda. This shift is reflected in the new commercial diplomacy strategy announced by the Trump administration for engagement with African countries, focusing on securing new markets in Africa for U.S. exports, urging African countries

[5] Cooke, J. G. (2013). *De Clinton à Obama, les États-Unis et l'Afrique. Politique étrangère*, 78(2), 67–79. Access here.
[6] Bolton, J. R. (2018, December 13). *Remarks by National Security Advisor Ambassador John R. Bolton on the Trump Administration's new Africa strategy.* Washington, DC: The White House. Access here.
[7] Reports indicate that there is a push to pivot the DFC from being a primarily mission driven development finance institution to a primarily profit-seeking entity under new leadership and management. This may have implications for the level of DFC's engagement in Africa.
[8] The White House. (2022, August). *U.S. Strategy Toward Sub-Saharan Africa*. Washington, DC: U.S. Government Publishing Office. Access here.

to implement pro-market reforms to facilitate U.S. investment, launching flagship infrastructure projects in priority countries; increasing commercial diplomacy trips, facilitating U.S. private sector investment in Africa, and advocating for structural reforms to U.S. trade promotion, project preparation, and financing tools to better support U.S. companies. This comes against the background of drastic aid cuts, rising trade barriers with the continent, and a general disdain for multilateral engagement and institutions (many of which are crucial to Africa, albeit not without tensions).

The Trump administration has reduced the U.S. foreign aid budget by over 83%, with African countries particularly exposed as leading recipients of U.S. ODA. It has also withdrawn U.S. contributions (US$500M) to the African Development Fund (ADF), hampering the momentum of ADF's 17th replenishment at a time of acute need for African countries. In addition, the administration allowed AGOA to expire, with adverse consequences, particularly for countries and sectors that thrived under it, such as apparel in Mauritius, Lesotho, and Kenya. However, many of the exemptions announced allow African countries such as Nigeria to access the U.S. oil market.[9]

Furthermore, President Trump has continued to favour bilateral engagement over multilateralism, as shown by his decision to host just five African heads of state for a luncheon a few months into his second term, as well as the bilateral focus of U.S. Special Presidential Advisor for African affairs Massad Boulos' engagement with African countries thus far. This approach undermines Africa's ability to pursue its collective interests vis-à-vis the U.S., evidenced by the indefinite suspension of the U.S.-Africa Leaders' Summit that was slated for September 2025 on the sidelines of the UN General Assembly.

In addition, the Trump administration has withdrawn U.S. support for the UN global corporate tax agreement, opposed reform of the UN Security Council, urged the IMF to go "back to basics", and criticised the World Bank's work on climate change, some which had been benefiting African countries.

Furthermore, President Trump has issued a flurry of Executive Orders, some of which have significant implications for African countries (see Table 1). More recently, the administration has begun pressuring African countries to act as third countries for immigrants deported from the United States as part of its immigration policy. Several African countries have accepted this arrangement in the hope of securing concessions in return.

Table 1: The Impact of Some of President Trump's Executive Orders on African Countries

Executive Order	Summary	Impact on Africa
Strengthening Immigration Enforcement	Deportation proceedings for undocumented immigrants in the U.S., including approximately 41,552 Africans	- Increased deportation of African nationals (Somalia having the largest number) - Heightened fear and uncertainty in African diaspora communities in the U.S.

[9] The Africa Report. (2025, October 10). *The end of AGOA is not Africa's export cliff article*. Access here.

Halting New Asylum Admissions	- Imposed an indefinite ban on new asylum seekers entering the U.S.	- Significant impact on African asylum seekers fleeing conflict or persecution - Closed a critical pathway of humanitarian relief for displaced Africans
Cancellation of all U.S. foreign assistance	- Cut U.S. foreign assistance by 85%, folding critical programs in health and education.	- Created immediate funding gaps for key programs in top aid recipient countries (e.g., Ethiopia, Somalia, DRC)
Withdrawal from the Paris Climate Agreement	Immediately ceasing and revoking of any financial commitment by the U.S. under the framework of the Paris Climate Agreement.	- Significant cut in climate funding for African adaptation and resilience projects, escalating vulnerability to climate impacts.
Withdrawal from the World Health Organization (WHO)	Revocation of U.S. membership in the World Health Organization	Undermines international health solidarity and leaves the most vulnerable parts of the world, Africa in particular, at greater risk.
National energy emergency	Authorisation of significant increases in domestic U.S. oil production	Cheaper American production could affect prices and challenge market share of oil-exporting African countries such as Nigeria and Angola.
Rescinding the executive order creating the President's Advisory Council on African Diaspora Engagement	Elimination of the President's Advisory Council on African Diaspora Engagement created under the Biden administration	Weakening Africa's diplomatic ties with the U.S. as African diaspora is a key constituency of the African Union for bolstering U.S. Africa cultural and commercial ties.

Certainly, the more open commercial strategy offers African countries the opportunity, perhaps for the first time, to engage with the U.S. on the quality of commercial relations (which had arguably been overlooked in the past). However, the drastic cutback of U.S. foreign assistance, trade and multilateral engagement will no doubt negatively impact African countries' access to development tools at a time of great fiscal constraint.

How U.S.-Africa relations evolve going forward will depend on the ability of African leaders to organise and strategise effectively. To date, a significant reorientation of U.S. policy toward African countries has never been achieved, and the new direction of the Trump Administration makes it even more complex, due to unpredictability and its bilateral slant. The ability of African leaders and diplomats to coordinate and cooperate in their engagement with the United States will be crucial to ensure that African priorities help shape the agenda for a more balanced partnership.

1.3 Institutional Framework

1.3.1 U.S. Government Departments and Agencies working on U.S.-Africa Engagement

There are several U.S. government departments and agencies involved in U.S.-Africa policy across two of the three branches of the U.S. government: the Executive and the Legislature. However, some of these, such as USAID, have since been phased out by the Trump administration.

Figure 1: US – Africa Stakeholder Map within the U.S. government and agencies

1.3.2 Existing engagement between the U.S. and the African Union

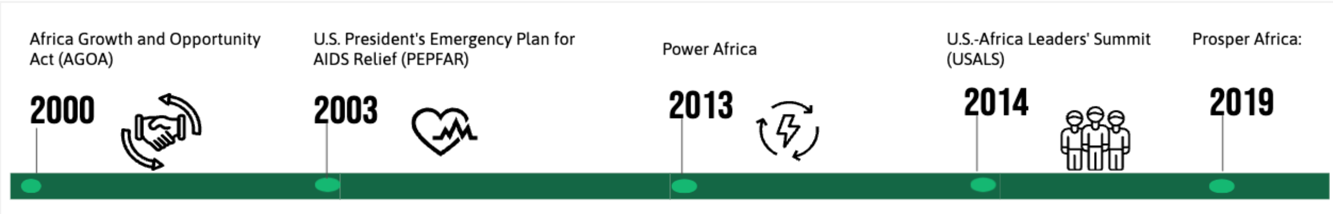
1. **AU Mission to the US**

The African Union maintains a mission to the U.S. with a mandate to develop and maintain productive institutional relationships between the African Union and U.S. government, the Bretton Woods Institutions, non-governmental and academic organisations engaged in African issues and policy, and Africans in the Diaspora. The AU mission is also charged with coordinating African Positions; building, sustaining, and nurturing the bilateral relationship; monitoring and advising the African Union headquarters; raising awareness of Africa within the U.S.; supporting multilateral relationships; mobilising resources; and building constituencies for Africa. The Mission is led by the AU ambassador to the U.S.

2. **U.S. Mission to the African Union (AU)**

The United States was the first non-African country to establish a diplomatic mission to the African Union, in 2006. The goal of this mission is to partner with the AU in ways that will strengthen democratic institutions, promote peace and stability, support sustainable economic development through increased trade and investment, and improve the lives and health of all Africans. Since 2013, an annual U.S.-AUC High-Level Dialogue between the U.S. and the AU Commission has been held to deliberate on issues of mutual concern. The ninth annual High-Level Dialogue was held in November 2023 in Washington, D.C., led by the U.S. Secretary of State and the AUC Chairperson, and focused on peace and security, climate and food security, and the U.S.-Africa Leaders' Summit (USALS).

Figure 2: Key Milestones in U.S.-Africa Relations



Chapter 2: Progress on U.S. Africa Leaders' Summit 2022 Commitments

Key takeaways

1. The USALS 2022 committed US$55 billion to Africa over three years.
2. Overall progress as of January 2025 was about 72% (44% fulfilled, 28% in progress).
3. Trade & Investment, Climate, Health, Food Security, and Infrastructure accounted for over 95% of all commitments, with Trade & Investment largest at 27%.
4. Kenya had the highest number of commitments fulfilled (13), followed by Ghana, Nigeria, Zambia (6 each), and South Africa (5).
5. Political cooperation saw the greatest progress, underpinned by high-level visits and multilateral engagement.
6. Discontinuation of reporting and postponement of the 2025 U.S.-Africa Summit may undermine continued progress.

2.1 Overview of the Summit and Commitments

The second edition of the U.S.-Africa Leaders' Summit (USALS) was held in December 2022 in Washington, D.C. During the Summit, the U.S. committed to investing US$55 billion in Africa over three years. Between 2022 and 2024, Development Reimagined undertook a tracking exercise to access progress made on these commitments. Notably, the discontinuation of official reporting on progress made tracking difficult from January 2025 onward, as our tracking activity relied on information publicly released by the U.S. government. Below, we summarise our findings.

Commitments at the USALS fell into ten broad categories: Democracy, Governance and Human Rights (DRG), Trade and Investment, Health, Food Security, Peace and Security, Digital Transformation, Space, and Youth, Education and Diaspora. Trade and Investment, Climate, Health, Food Security, and Infrastructure accounted for over 95% of all commitments made at the USALS. Trade and Investment accounted for the largest share—over 27%—followed by Climate (19%), Health (18%), Food Security (10%), and Infrastructure (7%).

2.2 Overall Progress and Tracking

As of January 2025, overall progress stood at about 72% (44% of commitments fulfilled and 28% in progress). According to our tracking, there was no publicly available record of progress on 28% of the commitments. Notably, a significant number of the commitments announced at the USALS predated the Summit—at least 20% by our count.

At a sectoral level, commitments made under the Trade and Investment banner saw the most progress (75%—46% complete and 29% in progress), followed by Food Security (73%—26% complete, 47% in progress); Climate (72%—49% complete, 23% in progress); Infrastructure (72%—29% complete, 43% in progress); and Health (70%—55% complete, 15% in progress).

At a country level, Kenya saw the highest number of commitments fulfilled (13), followed by Ghana, Nigeria, and Zambia (6 each) and South Africa (5), rounding out the top five.

2.3 Political Cooperation

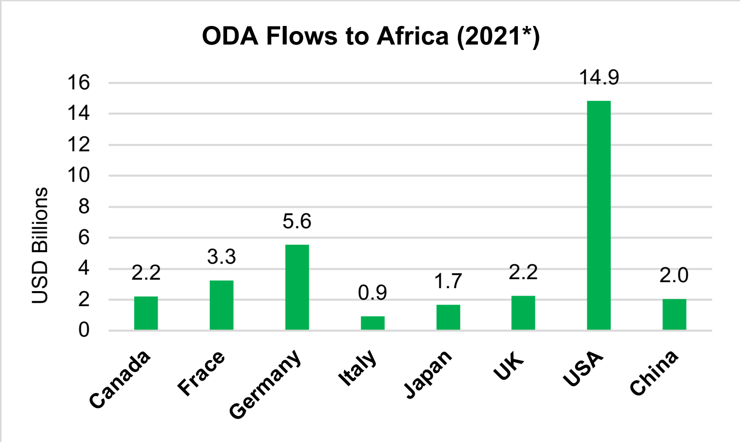
The realm of political cooperation experienced the greatest progress in U.S.–Africa relations. Since 2023, several high-ranking U.S. government officials have undertaken over 65 visits to more than 25 African countries in an effort to forge closer political ties. President Biden himself finally visited Angola in December 2024. More significantly, the Biden administration supported Africa's call for inclusion in global decision-making forums by backing the admission of the African Union to the G20 as a permanent member and calling for permanent representation for Africa on the UN Security Council.

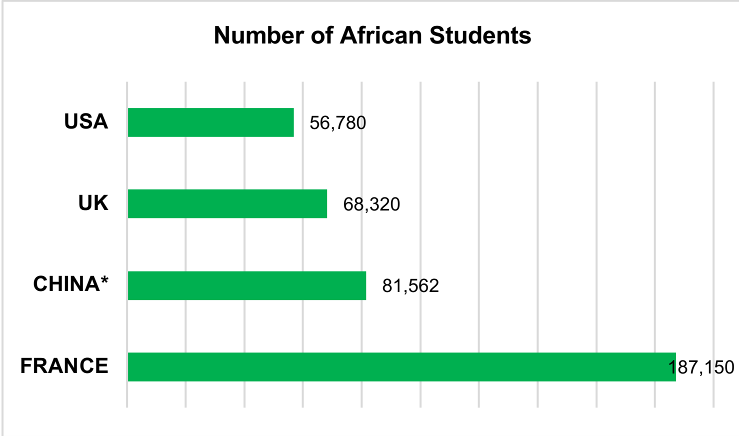
Overall, the USALS played a key role in revitalising U.S.–Africa relations, especially in the realm of political cooperation. Notable progress was recorded over the tracking period, and this progress was strongly underpinned by multilateral cooperation. Many commitments were implemented through partnerships involving African governments, international institutions, and other global actors, reinforcing Africa's growing role in collective problem-solving on trade, climate, and global governance. These outcomes demonstrated how sustained collaboration across multiple actors can create momentum for achieving significant results within a short time frame.

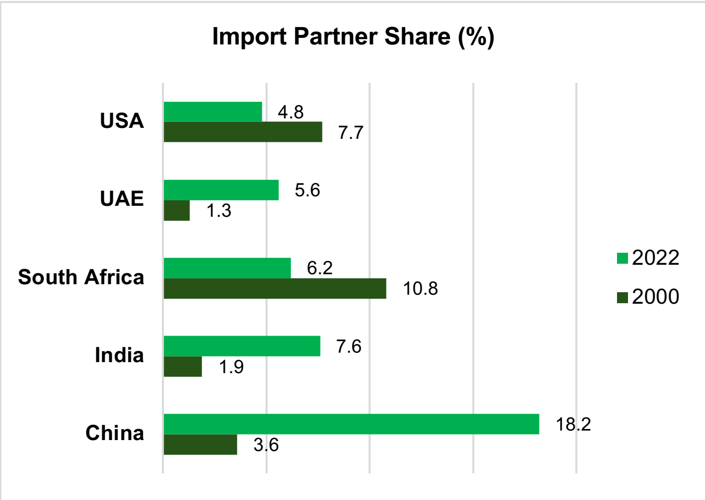
The implications of these tracking results for African countries are significant. Many governments on the continent aligned their development planning and partnership expectations with the Summit's promises—particularly in trade, climate, food security, and infrastructure. While some commitments were delivered, the discontinuation of reporting and the reduction in foreign assistance under the Trump administration created a vacuum of both resources and predictability. For African countries, this shift increases the risk of stalled projects and erodes trust in U.S. commitments.

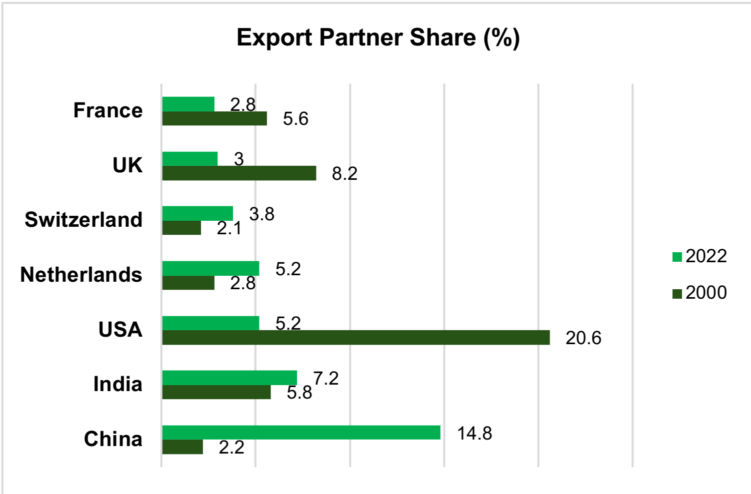
These unfulfilled commitments, and the indefinite postponement of the U.S.–Africa Summit that was planned for September 2025, undermine the progress made in U.S.–Africa relations under the Biden administration. The multilateral cooperation that had been central to achieving earlier outcomes is now at risk, as the new administration emphasises bilateral deals and a reduced role in global institutions. This change could be an opportunity, but it could equally reverse Africa's hard-won gains in collective representation on global platforms such as the G20 (especially as South Africa hands over its 2025 G20 Presidency to the U.S. for 2026) and limit opportunities for the U.S. to support continent-wide initiatives.

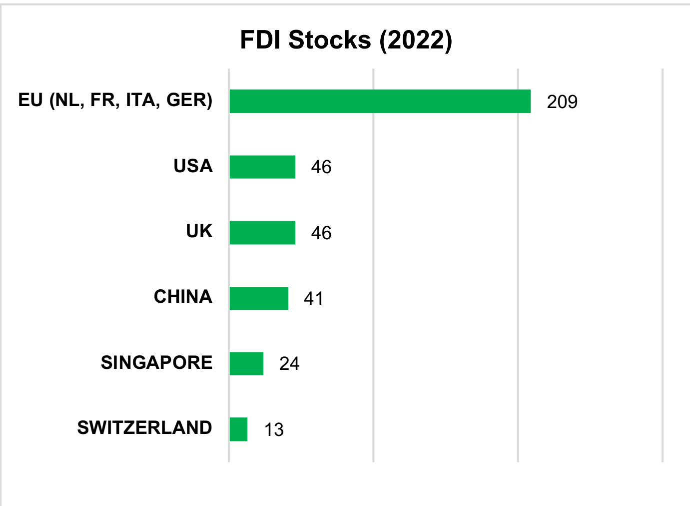
2.4 Benchmarking the U.S.-Africa partnership

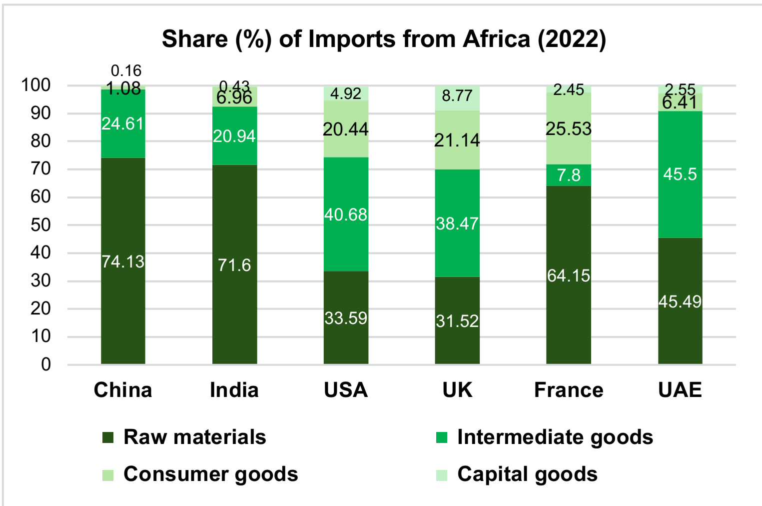












Source: WITS

Chapter 3: Trade

Key takeaways

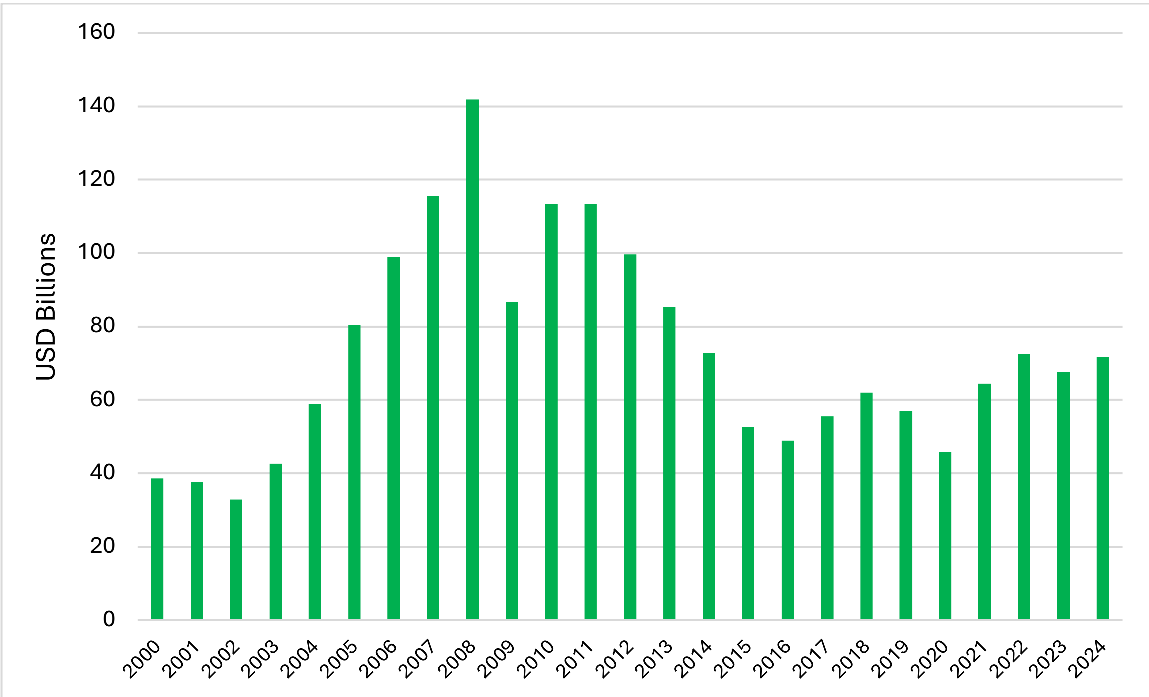
1. Annual trade volume grew by just 2.5% between 2000-2024, almost doubling from US$38 billion to US$72 billion.
2. Africa exports mainly primary commodities and imports mainly capital goods from the U.S.
3. Only five countries account for over 70% of Africa's total trade with the U.S.
4. Trade volume as well as AGOA exports have declined by almost 50% since 2008.

3.1 Current dynamics

African exports to the U.S. have grown modestly over the past two decades, rising from US$39 billion to US$72 billion between 2000 and 2024, an increase of 84%, representing an average annual growth rate of just 2.5%[10]. Between 2000 and 2008, the volume of trade rose sharply from US$39 billion to US$142 billion, an increment of 264%. Since 2008, however, the volume of trade has been on a downward trend, falling to US$72 billion in 2024, a decline of almost 50%.

During this period, the U.S. has gone from being Africa's third-largest trade partner in the early 2000s to being eclipsed by China and India as major trade partners for Africa. In 2024, U.S.-Africa trade represented just 2.2% of U.S. total trade.

Figure 3: U.S.-Africa Trade Volume (2000-2024)



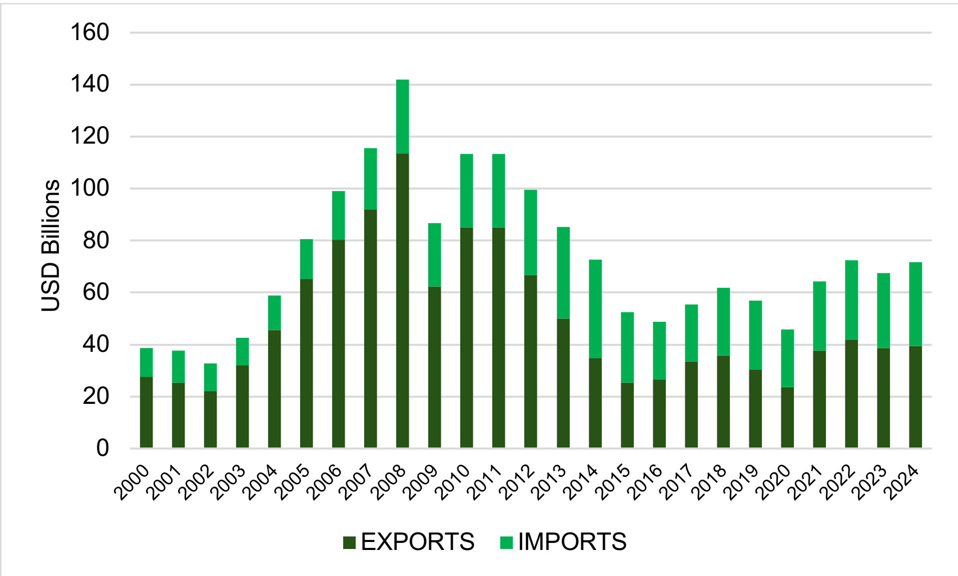
Source: U.S. Census Bureau

[10] U.S. Census Bureau. (n.d.). *Trade in Goods with Africa (balance c0013)*. Access here.

In terms of exports, Africa's exports to the U.S. have increased by 43% over the past two decades, from US$28 billion in 2000 to US$40 billion in 2024.[11] During this period, Africa's share of total U.S. imports declined from 2% to 0.97%. Exports grew rapidly between 2000 and 2008, rising from US$28 billion to US$113 billion, an increase of over 300%. However, exports have fallen sharply since 2008, declining by 65% to US$40 billion in 2024. The decline in African exports to the U.S. is attributed to the sharp reduction in U.S. reliance on imports for its energy needs, resulting in a significant reduction in demand for oil imports from Africa.

Meanwhile, Africa's imports from the U.S. more than tripled over the past two decades, rising from US$10.9 billion to US$32 billion between 2000 and 2024. As a share of total U.S. exports, African imports from the U.S. increased from 1% to 1.5% during this period. Imports more than doubled from US$10.9 billion to US$28.4 billion between 2000-2008. After declining from US$28.3 billion to US$21.9 billion between 2011 and 2020, Africa's imports rebounded to US$32.1 billion in 2024.

Figure 4: Africa's Trade with the U.S. (2000-2024)



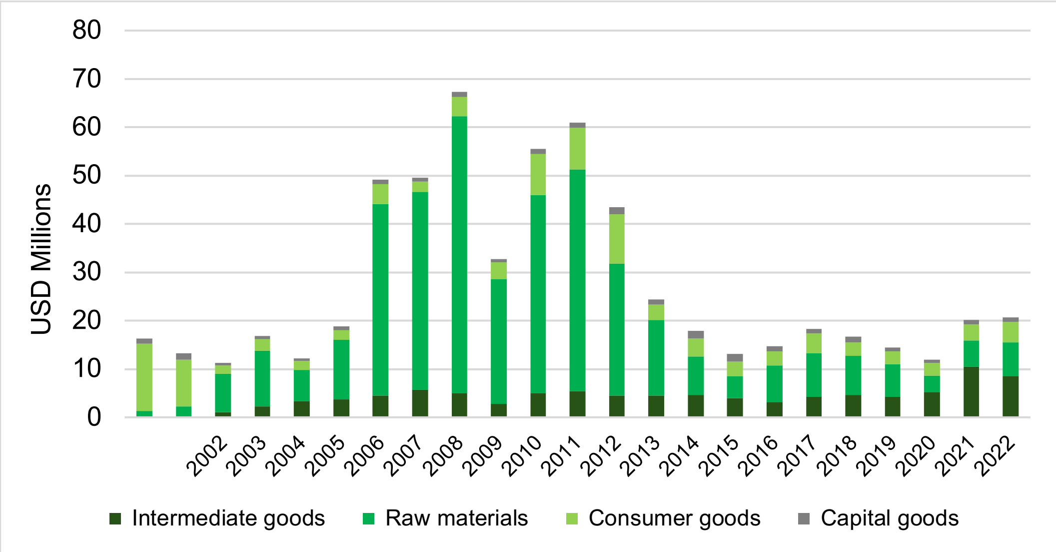
Source: U.S. Census Bureau

Meanwhile, African exports to the U.S. are dominated by raw-materials or minimally processed goods, reflecting the limited impact of U.S.-Africa trade on Africa's economic transformation (see figure 5).[12]

Figure 5: Composition of Africa's exports to the U.S. (2000-2022)

[11] U.S. Census Bureau. (n.d.). *Trade in Goods with Africa (balance c0013).* Access here.

[12] World Bank/WITS. (n.d.). *Country Profile — Sub-Saharan Africa: Exports to USA, all-products, 1990-2022.* Access here.



Source: WITS

1. **Export profile**

Over the past two decades, oil has dominated Africa's exports to the U.S., accounting for an average of 65% of total exports during this period.[13] Value-added exports include automobiles, which accounted for US$1.4 billion in 2023 (5.4% of total exports), and electrical machinery (US$412 million, 1.6%). Africa's top imports from the U.S. were mineral fuels, nuclear reactors, and vehicles, which together account for over 45% of total imports from the U.S.

Figure 6: Africa's Top Exports from the U.S. (2024)

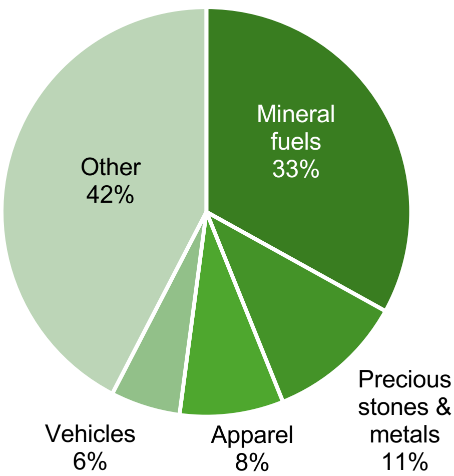
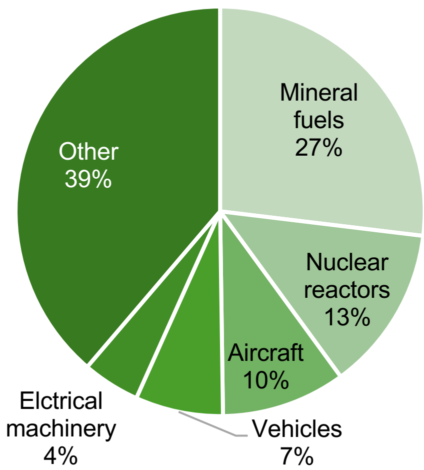


Figure 7: Africa's Top Imports to the U.S. (2024)



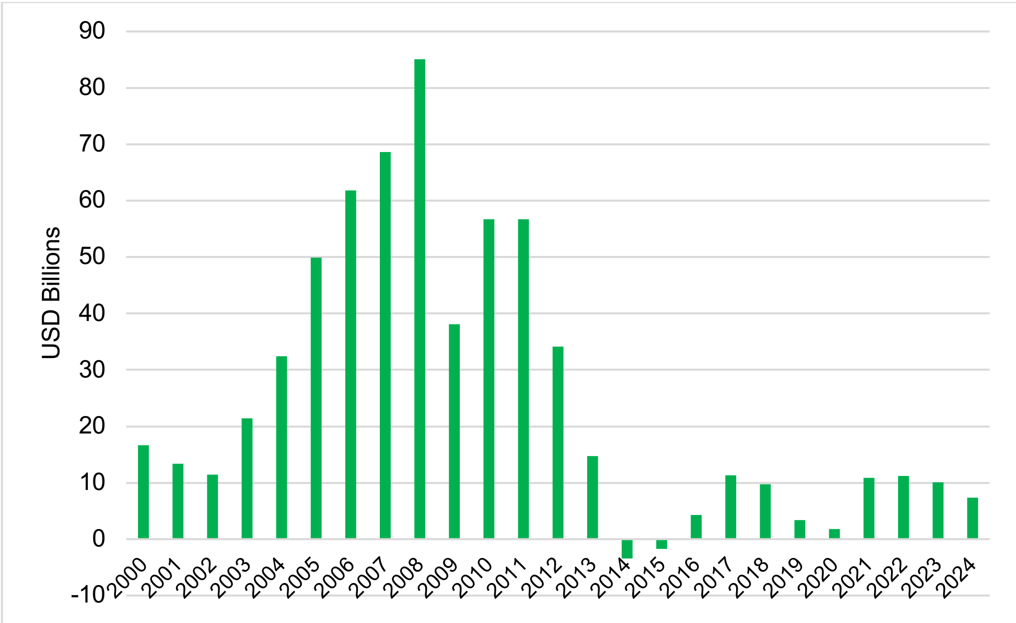
Source: WITS

2. **Balance of trade**

[13] World Bank/WITS. (n.d.). *Country Profile — Sub-Saharan Africa: Exports to USA, all-products, 1990-2022.* Access here.

Between 2000 and 2013, Africa enjoyed a trade surplus with the U.S., which peaked in 2008 at US$85 billion on the back of a commodity boom. Following the end of the commodity boom around 2014, Africa recorded a trade deficit with the U.S. between 2014 and 2016. Since 2016, however, Africa has maintained a trade surplus with the U.S., mainly driven by export of energy resources.

Figure 8: Africa's Trade Balance with the U.S. (2000-2024)



Source: U.S. Census Bureau

Figure 9: Africa's Top Exporters from the U.S. (2023, %Share)

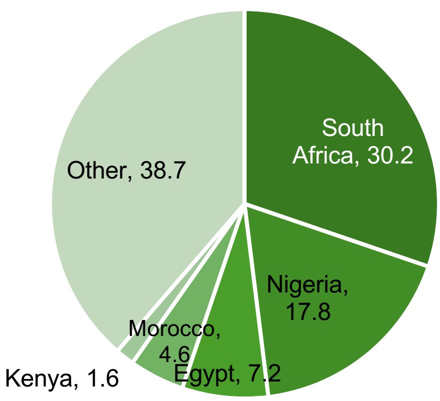
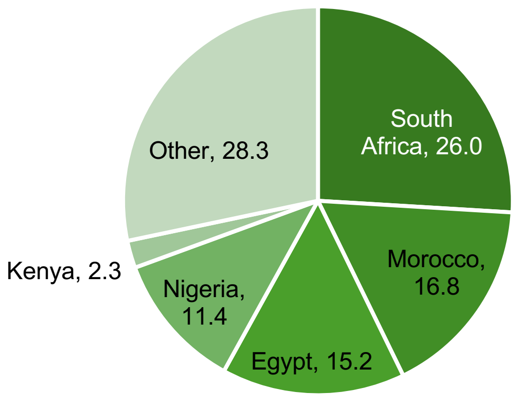


Figure 10: Africa's Top Importers to the U.S. (2023, %Share)



Source: WITS

3. **Regional distribution**

U.S. trade with Africa is concentrated in a few African countries. The leading African exporters to the U.S. in 2023 were South Africa (US$8.2 billion), Nigeria (US$4.9 billion), Egypt (US$1.9 billion), Morocco (US$1.3 billion), and Kenya (US$428 million). Together, these top five exporters accounted for over 67% of Africa's total exports to the U.S. The leading African importers from the U.S in 2023 were South Africa (US$9.2 billion), Morocco (US$6 billion), Egypt (US$5.4 billion), Nigeria (US$4 billion), and Kenya (US$807 million). Together, these five countries accounted for over 70% of Africa's total imports from the U.S. in 2023.

Box 1: Case Study of Prosper Africa

Prosper Africa is an initiative launched by the U.S. government in 2019 to increase two-way trade and investment between the United States and Africa. The initiative brings together 17 U.S. government agencies to provide a range of services to support U.S. and African businesses, including - market intelligence and matchmaking, investment facilitation and promotion, technical assistance and capacity building, and policy advocacy and regulatory reform.

During the 2022 USALS, Prosper Africa pledged to mobilise US$1 billion in new U.S. investment in Africa by 2025, whilst also seeking to increase African exports to the United States by US$1 billion. African exports stagnated between 2022-2024.

3.2 Trade agreements

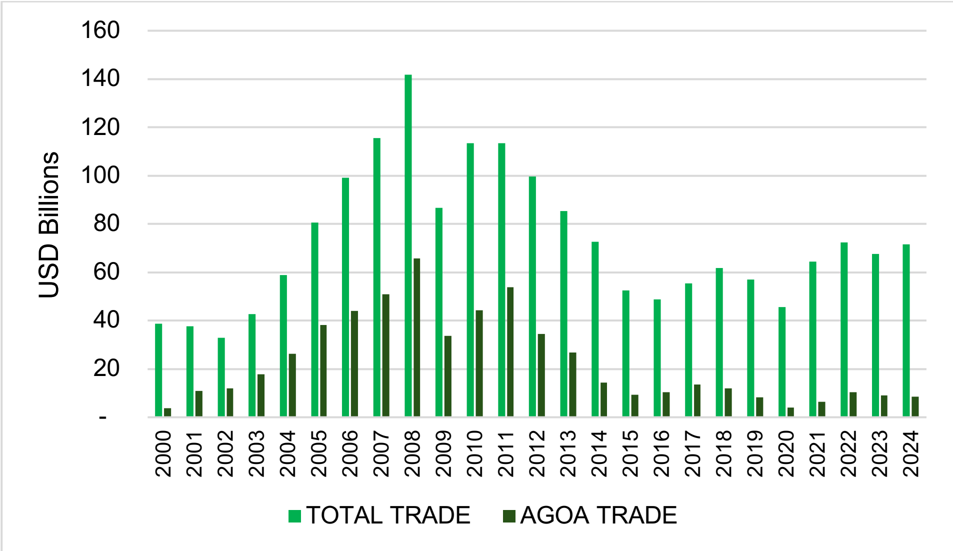
3.2.1 African Growth and Opportunity Act (AGOA)

The African Growth and Opportunity Act (AGOA) was enacted in 2000 to promote economic growth in Africa through non-reciprocal, duty-free access to the U.S. market for over 6,800 products from Africa.[14] AGOA was renewed in 2015 for ten years, and recently expired in September 2025 after a failure to secure timely renewal. The future of AGOA remains uncertain, given the Trump administration's aversion to non-reciprocal free trade agreements and its affinity for tariffs. In any case, AGOA has not achieved the lofty ambitions with which it was enacted.

The total volume of AGOA trade grew slightly between 2000 and 2024, from US$3.7 billion to US$8.4 billion.[15] Trade under AGOA rose sharply between 2000 and 2008, peaking at US$65.8 billion. Since then, however, trade under AGOA has declined by 87.2% to just US$8.4 billion in 2024. Trade under AGOA as a share of total U.S.-Africa trade has followed a similar pattern, rising from 13.5% to 21.3% between 2000 and 2024. The share of exports under AGOA rose rapidly between 2000 and 2012, peaking at 63% in 2012 before declining sharply thereafter. The decline in trade volume under AGOA has been driven by reduced demand for Africa's oil exports, which constitute a significant part of exports under AGOA.

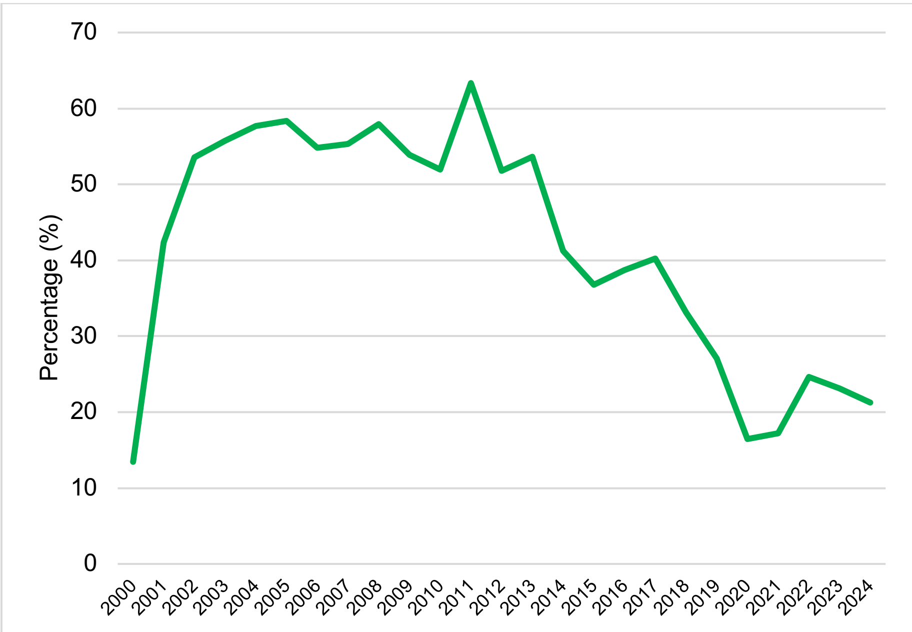
[14] AGOA.info. (n.d.). *About AGOA.* Access here.
[15] Ibid.

Figure 11: Total U.S.-Africa trade vs Trade under AGOA (2000-2024)



Source: AGOA.info, Office of U.S. Trade Representative

Figure 12: Trade under AGOA as a share of total U.S.-Africa trade (2000-2024)



Source: AGOA.info, Office of U.S. Trade Representative

In terms of export profile, trade under AGOA is dominated by primary commodities and concentrated in a few countries.[16] Oil exports account for the largest portion of exports under AGOA, averaging 81% of all exports under AGOA between 2000 and 2023. Leading non-oil import categories were transportation equipment (US$1.5 billion), textiles and apparel (US$1.4 billion), agricultural products

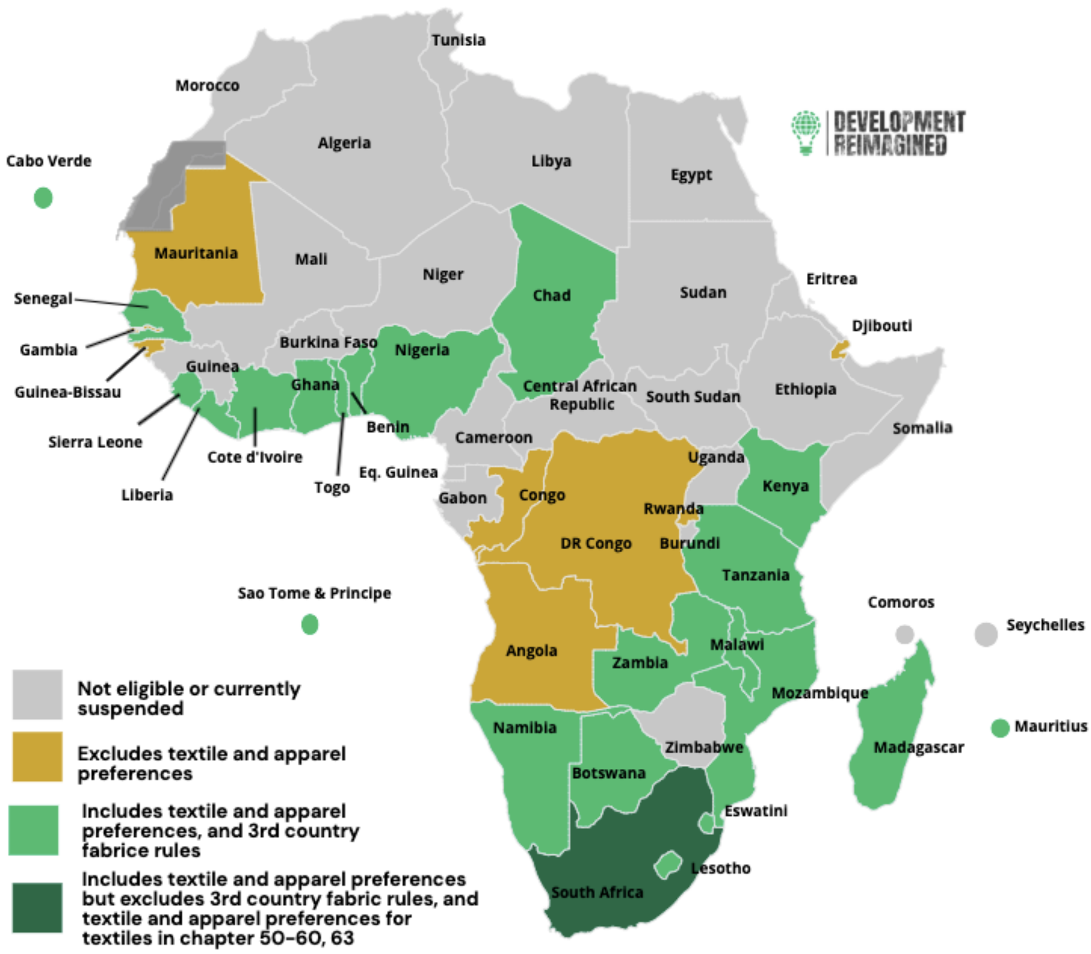
[16] Ibid.

(US$914 million), minerals, metals, and associated products (US$755 million), and jewellery and precious stones (US$420 million).
Meanwhile, AGOA beneficiary countries have enjoyed a trade surplus with the U.S since 2000. The trade surplus rose sharply from US$17 billion in 2000, peaking at US$65 billion in 2008. Since 2009, however, the trade surplus shrunk significantly, reaching US$14 billion in 2024.

Top AGOA beneficiary countries in 2022 were South Africa (US$3.6 billion; mostly vehicles and parts, fruits, precious metals, and chemicals), Nigeria (US$3.5 billion; mostly crude oil), Ghana (US$746 million; mostly crude oil), Kenya (US$614 million; mostly apparel), Madagascar (US$406 million; mostly apparel), and Angola (US$391 million; exclusively crude oil). Other top beneficiaries included Lesotho (US$260 million; mostly apparel), Cote d'Ivoire (US$127 million; mostly cocoa products), Gabon (US$125 million; mostly crude oil), and DR Congo (US$92 million; mostly copper ore and related products).

Figure 13: AGOA Eligibility 2024

As of 2024, 32 African countries were eligible for AGOA, with several others having been stripped of their eligibility[17].



[17] AGOA.info. (n.d.). *Country eligibility: How does a country qualify to become an AGOA beneficiary country?* Access here.

Source: U.S. Trade Representative

3.2.2 Other Trade Agreements

In addition to AGOA, the U.S. has concluded several other trade arrangements with African countries, including a Strategic Trade and Investment Partnership (STIP) with Kenya; a Free Trade Agreement (FTA) with Morocco; Bilateral Investment Treaties (BITs) with Cameroon (1986), Congo (1990), DR Congo (1984), Egypt (1986), Morocco (1985), Mozambique (1998), Rwanda (2008), Senegal (1983) and Tunisia (1990) and Trade and Investment Framework Agreements (TIFA) with Angola, Ghana, Liberia, Mauritius, Mozambique, Nigeria, Rwanda, South Africa, COMESA, EAC, ECOWAS, and WAEMU.[18] (See Figure 14 below). These agreements are aimed at facilitating trade and investment between the U.S. and the respective African countries.

Figure 14: Trade Agreements between African countries and the U.S.

Source: US Trade Representative

[18] Office of the United States Trade Representative. (n.d.). *Trade Agreements.* Access here.

Chapter 4: Financial Cooperation

Key takeaways

1. Total U.S. ODA flows to Africa rose from US$3.3 to US$15.9 billion between 2000-2024.
2. U.S. FDI stocks in Africa grew almost four-fold in 2000-2022 from US$12 – US$46 billion. Annual FDI flows declined from US$5.3 – 1.3 billion between 2011-2022.
3. Mining accounts for 42% of U.S. FDI stocks in Africa while manufacturing accounts for 13%.
4. Egypt, Nigeria and South Africa account for over 50% of U.S. FDI stocks in Africa.
5. U.S. bilateral loan stocks in Africa declined significantly while flows increased modestly between 2000-2023.

4.1 Current Dynamics

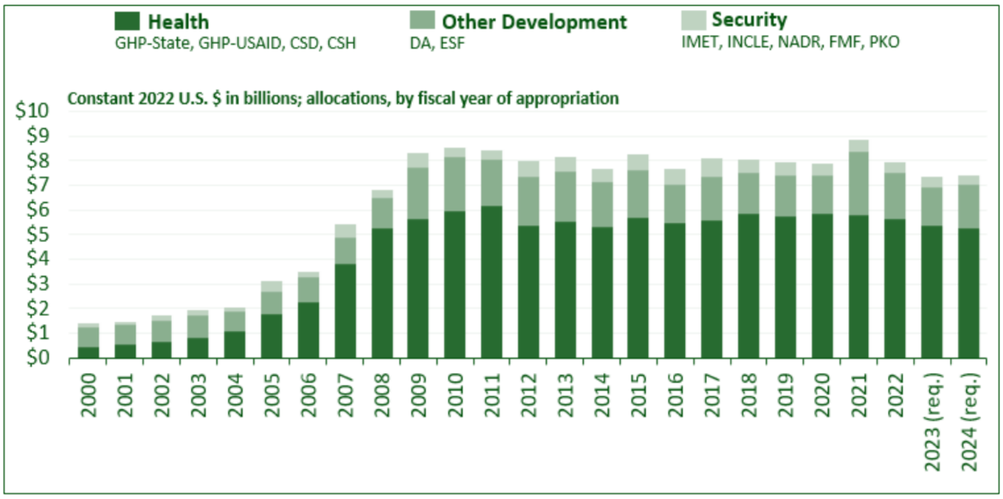
U.S.-Africa financial cooperation has primarily taken the form of Official Development Assistance (ODA) prior to the disruption of U.S. foreign assistance by the second Trump administration. ODA flows mainly targeted the health and agriculture sectors to address global health and food security challenges in Africa. In addition to ODA, other mechanisms of financial cooperation include Foreign Direct Investment (FDI) and multilateral lending, targeting sectors such as healthcare, agriculture, mining, manufacturing, and finance. However, the combined U.S. financial flows to Africa pale in comparison to Africa's financing needs.

4.1.1 Official Development Assistance (ODA)

The bulk of U.S.-Africa engagement has been driven by ODA (consisting primarily of grants and concessional loans). Prior to the second Trump Administration, U.S. ODA policy was intended to support the objectives of the U.S. National Security Strategy[19] and to advance U.S. foreign policy goals in Africa. U.S. ODA to Africa covers a wide range of areas, including humanitarian aid, economic development, democracy, rights and governance, and security. Health and agriculture make up the bulk of U.S. ODA to Africa as part of U.S. global health and food security strategy.

Figure 15: Trends in U.S. Bilateral Foreign Assistance to African countries

[19] The White House. (2022, November 8). Access here.



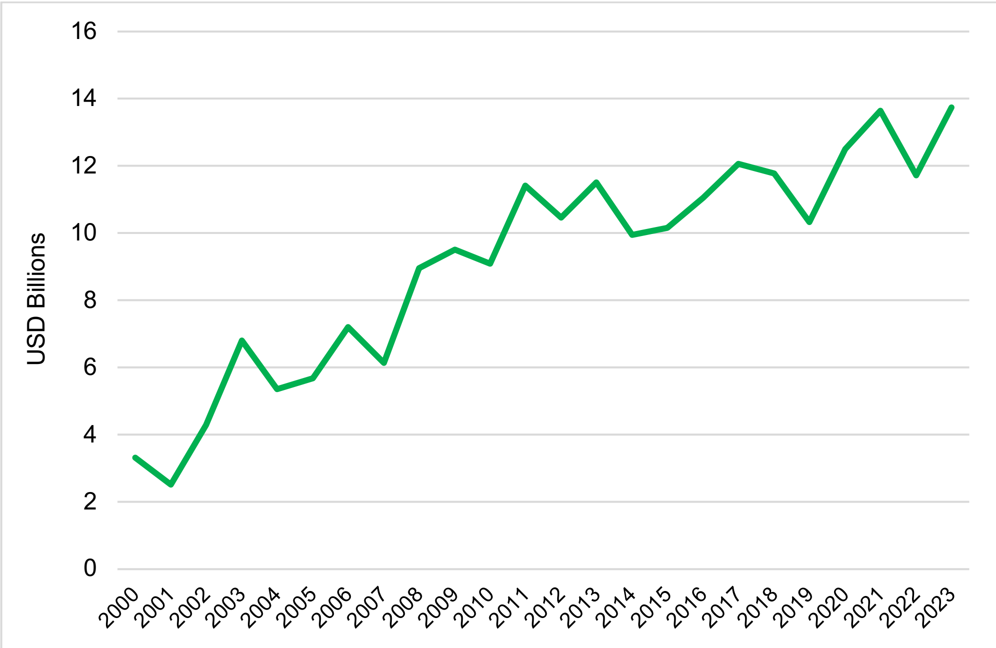
Source: U.S. Congressional Research Service

ODA flows were channeled either bilaterally (through USAID) or multilaterally (through contributions to institutions such as the UN, World Bank, IMF, and the African Development Bank (AfDB)). The level of U.S. bilateral aid (ODA administered by USAID) remained stable between US$7.7 billion to US$8.3 billion each year since 2012.[20] However, a slight decline was observed following the USALS in 2022, as shown in figure 15 above.

Total ODA flows (bilateral and multilateral) quadrupled over the past two decades, rising from US$3.3 billion in 2000 to US$15.9 billion in 2024. In 2024, the bulk of U.S. ODA to Africa went to humanitarian causes (38%) and healthcare (35%). The largest recipients of ODA in 2024 were Ethiopia (US$1.3 billion), DR Congo (US$1.2 billion), Somalia (US$962 million), Nigeria (US$878 million), and South Sudan (US$841 million). The top five recipients accounted for 33% of total aid to Africa.

Figure 16: Total U.S. ODA Flows to Africa (2000-2023)

[20] U.S. Congress, Congressional Research Service. (2022). *U.S. assistance for Sub-Saharan Africa: An overview* (CRS Report R46368). Access here.



Source: OECD Database

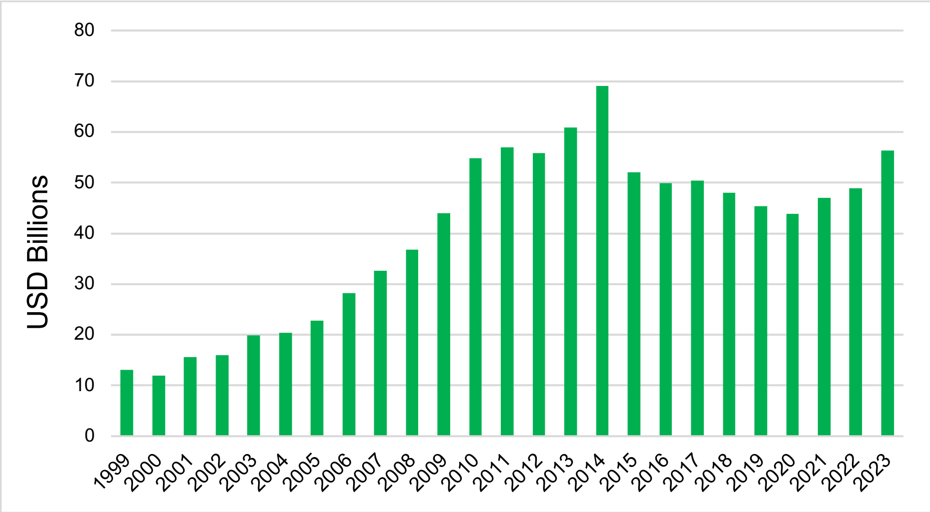
Between 2000 and 2024, U.S.-funded multilateral ODA to Africa more than doubled from US$2.2 billion to US$4.6 billion, peaking at US$5.3 billion in 2021. In 2022, the largest recipients of multilateral ODA were Nigeria (US$446.5 million), Ethiopia (US$266.9 million), Tanzania (US$251.1 million), Kenya (US$242.2 million), Zambia (US$139.8 million), and Cote d'Ivoire (US$102.7 million).

Between 2000 and 2023, U.S. humanitarian aid to Africa increased more than tenfold, from US$1 billion to US$11 billion, peaking at US$13 billion in 2021. Between 2000 and 2005, humanitarian aid grew rapidly from US$1 billion to US$7 billion. Between 2006 and 2020, humanitarian aid hovered between US$5 – 8 billion before rising sharply in 2021. The largest African recipients of U.S. humanitarian aid in 2022 were Somalia (US$357.8 million, 7.7%); DR Congo (US$201 million, 4.3%); Uganda (US$78.4 million, 1.7%); Burkina Faso (US$71.1 million, 1.5%), and Madagascar (US$67.1 million, 1.4%). Northern Africa received the lowest volume of humanitarian aid, totalling US$54.7 million, just 1.2% of total US humanitarian aid to Africa.

4.1.2 Foreign Direct Investment (FDI)

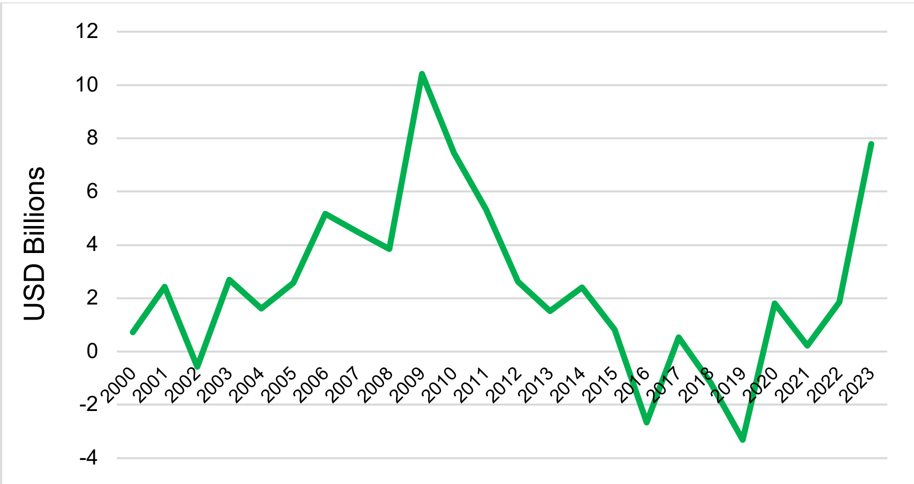
U.S. FDI flows to Africa are mostly driven by private sector actors, with the U.S. government playing a facilitating role through agencies such as the USTDA and U.S. EXIM Bank, which help de-risk and finance overseas investments by U.S. firms. U.S. FDI stocks in Africa increased more than fourfold between 2000 and 2023, from US$12 billion to US$56 billion. FDI stocks rose steadily between 2000 and 2014, peaking at US$69 billion in 2014. However, since 2014, U.S. FDI stocks in Africa have been on a downward trend, decreasing by 30% to US$48 billion in 2022. Moreover, U.S. FDI stocks in Africa represent a very small fraction of U.S. overseas direct investment. Between 2000 and 2024, U.S. FDI in Africa has remained minimal compared to total U.S. outward FDI flows.

Figure 17: US FDI Stocks in Africa



Source: U.S. Bureau of Economic Analysis

Figure 18: U.S. FDI Flows in Africa

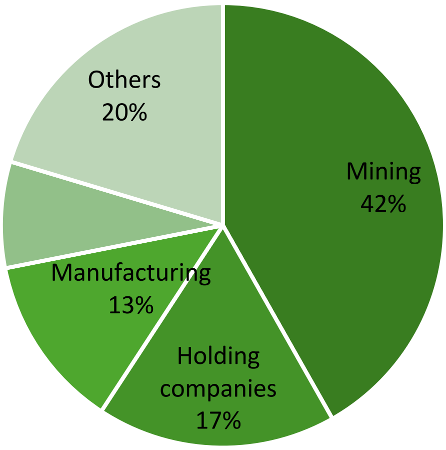


Source: U.S. Bureau of Economic Analysis

Annual FDI flows from the U.S. to Africa declined sharply over the past decade, falling from US$10.4 billion in 2009 to just US$0.2 billion in 2022. This decline was driven by divestments from mining assets, healthcare, and short-term (hot money) investments in fintech companies. Net FDI flows between Africa and the U.S. were negative in 2016 and 2020. Annual FDI outflows from Africa to the U.S. also declined between 2011 and 2022, from US$1.9 billion to US$611 million. Meanwhile, FDI outflows from Africa to the U.S. peaked in 2019 at US$3.9 billion and were negative in 2012.

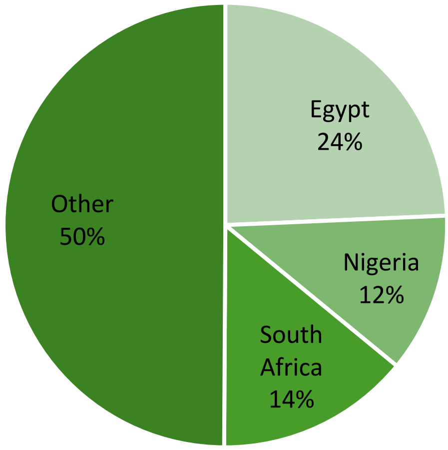
In 2023, the top sectors targeted by U.S. FDI inflows to Africa were mining and quarrying (46.7%), manufacturing (44.6%), and ICT (8.6%). At a country level, U.S. FDI to Africa is concentrated in Egypt, Nigeria and South Africa, which together account for 50% of total U.S. FDI stocks in Africa.

Figure 19: Sectoral Share of U.S. FDI in Africa (2023)



Source: UNCTAD

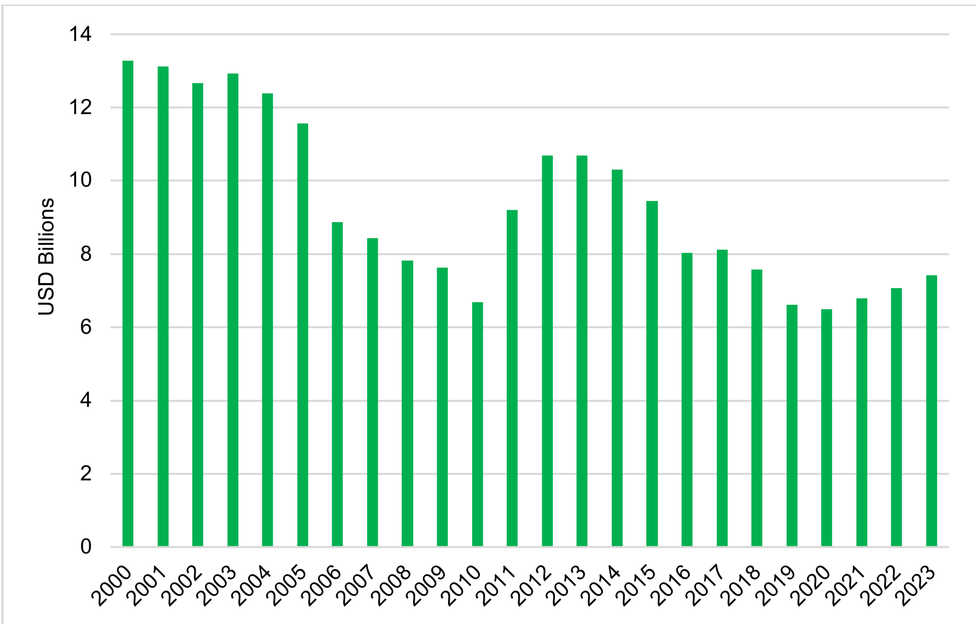
Figure 20: Top Recipients of U.S. FDI in Africa (2023)



Source: UNCTAD

4.1.3. Bilateral and multilateral lending

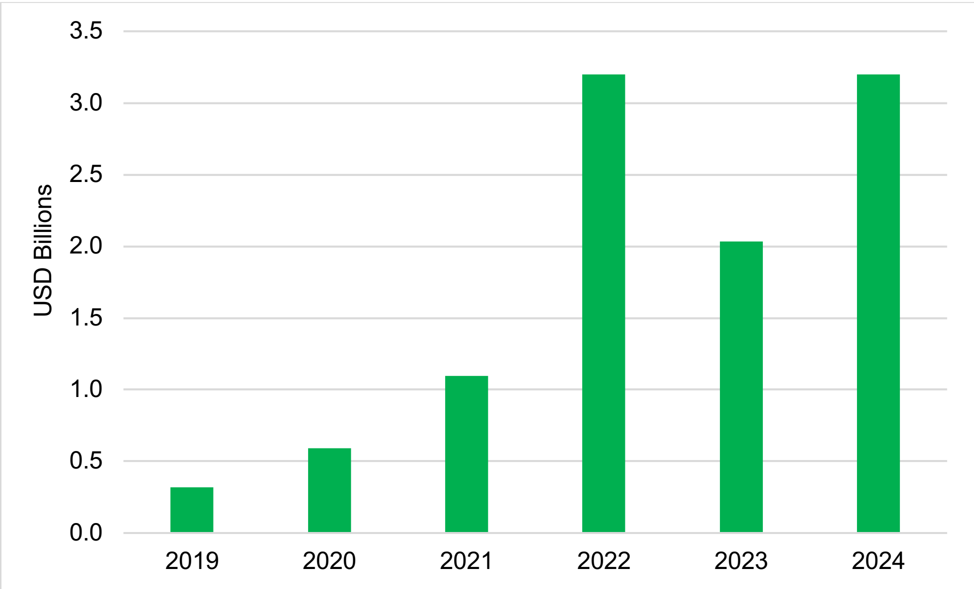
Figure 21: U.S. Debt Stocks in Africa (2000-2023)



Source: World Bank International Debt Statistics

U.S. annual bilateral lending to Africa increased modestly between 2000 and 2022, rising from US$139 million to US$1.7 billion, and peaking at US$3.4 billion in 2012. As a result of the slow growth in annual flows of bilateral loans, U.S. debt stocks in Africa declined sharply over the past two decades, falling by almost 50% from US$13.3 billion in 2000 to US$7.4 billion in 2023. The Development Finance Corporation (DFC) is the primary channel of U.S. bilateral lending to Africa. Between 2015 and 2019, annual DFC financing in Africa fell from US$0.9 billion to US$0.3 billion. DFC financing then rose sharply to US$3.2 billion in 2022, before dropping again to US$1.2 billion in 2024. In terms of direct loans, DFC lending to Africa has more than doubled since 2020, rising from US$0.5 billion to US$3.2 billion in 2024.

Figure 22: Total Value of DFC Transactions in Africa (2019-2024)



Source: DFC Transactions Data 2024

Between 2019 and 2024, the top sectors targeted by the DFC were finance and insurance (42%) and mining (31%), with manufacturing accounting for just 4%. Most DFC financing in Africa takes the form of loans and loan guarantees (51%), insurance and insurance guarantees (40%), and equity (6%). Furthermore, out of 54 African countries, only 21 received funding from the DFC, with over 60% of total funding going to just five countries – Mozambique, South Africa, Gabon, Kenya and Nigeria – during this period.

These trends highlight the need to diversify DFC lending both at a sectoral and country levels and to better align it with regional and national priority projects.

4.1.4 Debt Relief

The U.S. has historically not directly provided debt relief to African countries, primarily due to the low levels of bilateral debt involved. However, the U.S. was a major player in the HIPIC and MDRI debt relief initiatives because of its significant shareholding in the IMF and World Bank at the time.[21] Hence, many of the policies required in return for debt relief have been viewed as serving U.S. interests.

The Biden administration also acknowledged the challenging debt situation facing African countries. During Kenyan President William Ruto's state visit to the U.S. in 2024, Kenya and the U.S. issued the

[21] Lowery, C. (2008, April 24). *Building on international debt relief initiatives: Testimony before the Senate Foreign Relations Committee.* Washington, DC: U.S. Treasury Department. Access here.

Nairobi-Washington Vision, which, among other things, set out a plan for developing countries to receive support from the international financial system to manage the fiscal challenges arising from the COVID-19 pandemic.

The Nairobi-Washington Vision called for creditor countries to provide relief for developing countries through debt suspensions, reprofiling, restructurings, or new budget support flows. The Vision also urged MDBs to play a bigger role by offering "enhanced, coordinated support packages that capitalise on new and expanded resources, including by maximising the right mix of financing; scaling up concessional financing with stepped-up support from donors; and fully utilising sustainability-focused funds, the broader climate finance architecture, and other pools of concessional finance."

However, there has been no follow-up on this effort to date.

Chapter 5: Infrastructure and Energy Cooperation

Key takeaways

1. U.S. infrastructure financing, historically limited, has increased through PGI projects like the Lobito Corridor.
2. Strategic minerals from Africa are key to U.S. supply chain security, but U.S. legislation (IRA) limits African participation.
3. U.S.-Africa trade in strategic minerals is concentrated, with South Africa accounting for ~50% of U.S. Platinum and Rhodium imports between 2000-2023.
4. AGOA's structure and product scope did not support critical mineral value chain participation by African countries.
5. Climate-related aid flows from the U.S. are low, accounting for less than 2% of U.S. ODA flows to Africa.
6. The U.S. has been inconsistent in meeting its climate financing commitments, fulfilling just 5% of its share in 2020—one-twelfth of the EU's contributions.

5.1 U.S. Infrastructure Funding in Africa

Until recently, the U.S. has not been keen to finance infrastructure projects in Africa, placing greater emphasis on institutions and good governance to drive economic growth. The Millennium Challenge Corporation (MCC) has been the exception to this norm, providing modest levels of finance for infrastructure projects in various sectors in several African countries. More recently, the U.S. has shown increased interest in funding infrastructure development in Africa. The Lobito Corridor railway, funded under the Partnership for Global Infrastructure and Investment (PGI) at a cost of over US$1 billion, epitomises U.S. attempts to fund major infrastructure projects in Africa after a long hiatus.

In addition to the Lobito Corridor, there have been several positive steps taken by the U.S. to support infrastructure development on the continent. These efforts aim to catalyse private sector investment, particularly in infrastructure projects, through risk-sharing mechanisms, technical assistance, and investment promotion programs. For instance, since the USALS in 2022, 33% (US$1.7 billion) of DFC funding in Africa has been directed towards supporting infrastructure development. Since 2019, the DFC has channelled over US$3 billion into infrastructure projects. In addition, the U.S. Trade and Development Agency (USTDA) has funded at least ten feasibility studies since the USALS. Half of these feasibility studies were undertaken for prospective infrastructure projects focused on clean energy, health, and digital infrastructure.

Table 2: Sample feasibility studies for infrastructure projects funded by USTDA since 2022

Project name	Country	Project description
Betmai Hydroelectric Power project	Sierra Leone	27 MW plant to support electrification of rural areas of Sierra Leone
Battery energy storage system	Zambia	Expansion of battery energy storage systems throughout the country to facilitate the integration of renewable power into Zambia's grid
Cotton Biomass Generation project	Cote d'Ivoire	25 MW biomass power plant to diversify Côte d'Ivoire's power generation mix
Lobito Corridor	Angola	485-mile rail line that will link Angola and Zambia

Table 3: Sample infrastructure projects funded by DFC since 2022

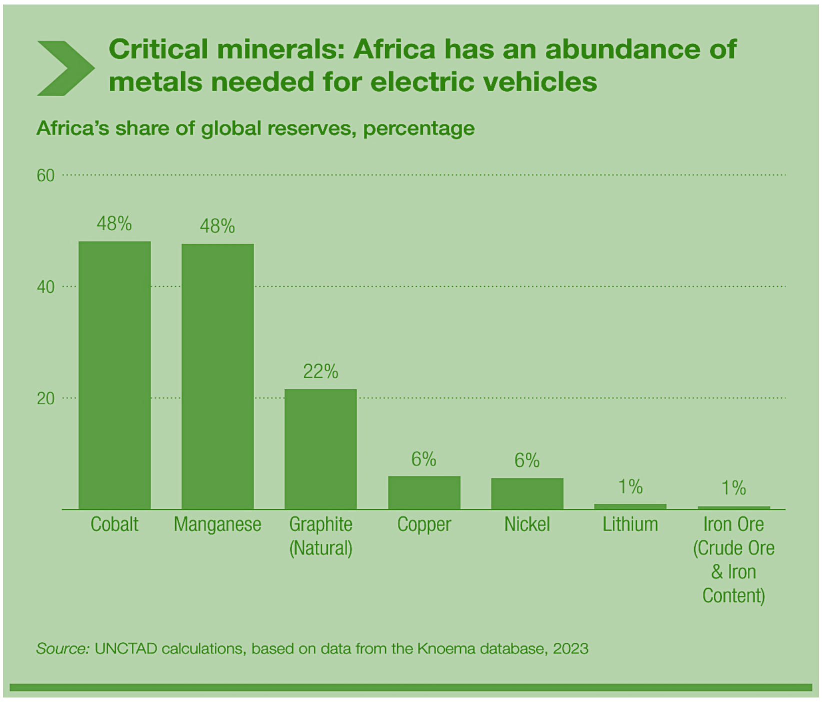
Project Name	Country	Project Description	DFC Funding
Accra Data Centre	Ghana	Construction of a 30 MW capacity data centre	US$50 million
Phanes Energy Renewables	Malawi	Construction of a 37 MW Solar PV plant in Nkhotakota Malawi	US$80.9 million
Golomoti JCM Solar Corporation Ltd	Malawi	Build Own Operate a 20MW Solar PV + 5 MW /10Mwh Battery Storage in the Golomoti district in Malawi.	US$25 million
Biovea Energie Biomass	Cote d'Ivoire	Design, development, construction and operation of a 46MW Biomass power plant.	US$9.1 million
Summa Airports Limited	Sierra Leone	Expansion, refurbishment, and operation of the Lungi International Airport in Freetown	US$150 million
Wind energy generation facility and battery energy storage system	Malawi	50 MW wind energy generation facility and a battery energy storage system to provide reliable clean energy to stabilise the national energy grid	

5.2 Critical Minerals Engagement

The African continent is estimated to hold about 30% of the world's reserves of strategic minerals.[22] At least 35 African countries, or 64% of the continent, have produced a critical mineral over the 50-year period from 1970-2022.[23] Such abundance reflects the comparative advantage African countries have in the global critical mineral discourse.

Figure 23: Africa's Share of Global Strategic Minerals Reserves (%)

[22] Chandler, B. (2022, October). *"Africa's critical minerals Africa at the heart of a low-carbon future"*. Mo Ibrahim Foundation. Access here.
[23] British Geological Survey. (2024). *"World Mineral Statistics Survey"*. Access here.



Source: UNCTAD calculations, based on data from the Knoema database, 2023

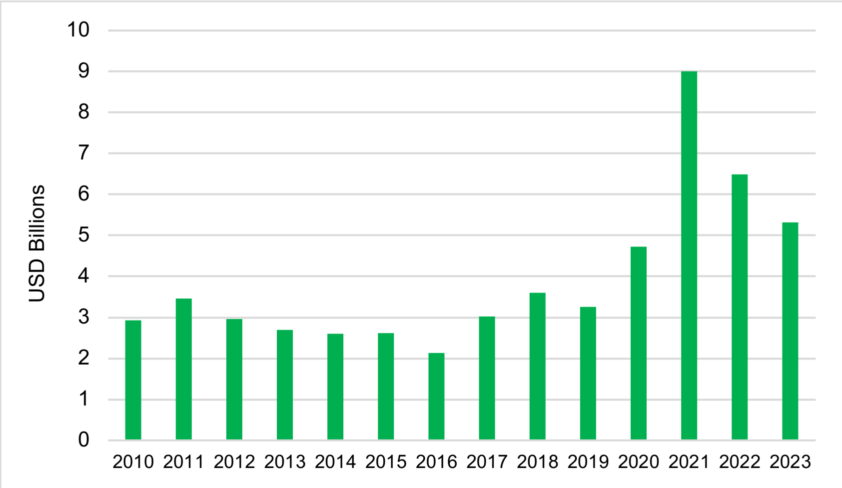
The African Union (AU), through the Africa Mining Vision (AMV), identified mineral value addition and beneficiation as strategic priorities to change the status quo of Africa exporting unprocessed mineral resources.[24] The AMV seeks to leverage Africa's abundant resource endowment to grow local manufacturing and promote downstream development of industries.

Unlike Africa, the U.S. has low domestic reserves of strategic minerals, leaving it heavily dependent on imports, with 11% of global imports of critical minerals in 2022 going to the U.S.[25][26] In terms of imports from Africa, arsenic, palladium, platinum, and rhodium are among the most commonly imported critical minerals by the U.S.[27] Across the board, South Africa is the dominant exporter, with as much as 50% of platinum and rhodium imports coming from South Africa between 2000 and 2023.[28]

Notably, the U.S. has historically held major stakes in Africa's mining assets, giving it considerable control over Africa's minerals. In addition, this control has grown in recent years with new acquisitions by U.S. mining conglomerates such as KoBold Metals.

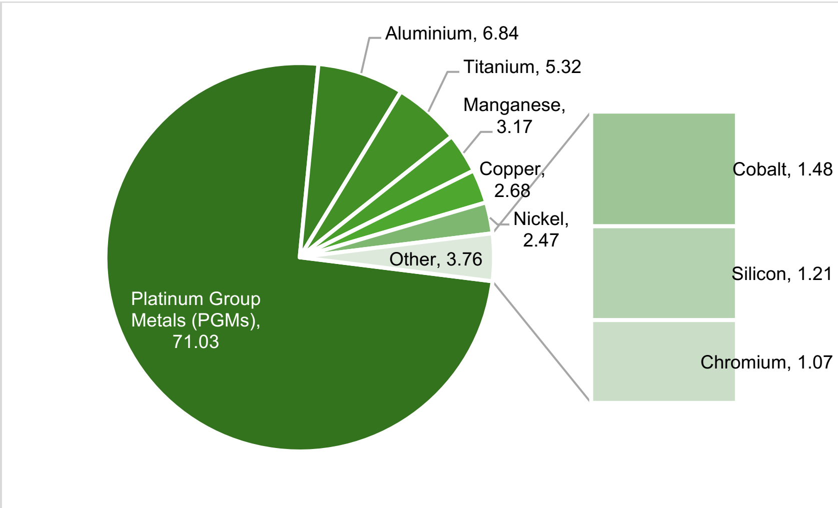
Figure 24: Total value of Africa's exports of critical minerals to the U.S. (2010-2023)

[24] African Union (AU). (2009 February). *Africa Mining Vision*. Access here.
[25] Barbanell, M. (2023, May 3). *Overcoming critical minerals shortages is key to achieving U.S. climate goals*. World Resources Institute. Access here.
[26] Snoussi-Mimouni, M., and Avérous., S. (2024 January 10). *High demand for energy-related critical minerals creates supply chain pressures*. World Trade Organisation. Access here.
[27] World Integrated Trade Solution (WITS). (2024). Access here.
[28] Ibid



Source: Trade in Critical Minerals Database (WTO, ADB)

Figure 25: Africa's leading critical mineral exports to the U.S (2023)



Source: Trade in Critical Minerals Database (WTO, ADB)

The U.S. faces supply-chain vulnerabilities given that a large proportion of global critical mineral production ends up in China for further processing. It is estimated that China processes as much as 80% of the world's rare earth elements, 60% of cobalt, 50% of lithium, and 30% of nickel.[29] Accordingly, geopolitical concerns are central to the U.S. approach to strategic minerals due to fears of politically motivated coercion that would compromise supply of critical minerals.[30]

With these constraints binding in the short-run, the U.S. has long-term plans to address its supply chain vulnerabilities to meet its energy transition needs.[31] Consequently, Africa's critical mineral reserves have drawn significant interest from the U.S. which seeks to secure its supply chains as well as meet its energy transition needs.

[29] Ibid
[30] Bradsher, K. (2010, September 23). *Amid tension, China blocks vital exports to Japan*. The New York Times. Access here.
[31] United States Department of Energy (DOE). (2022, February 14). *DOE launches US$140 million program to develop America's first-of-a-kind critical minerals refinery*. Access here.

Despite African countries proactively enacting laws to enable value addition, imbalances remain in the continent's strategic minerals cooperation with global partners such as the U.S. The dominance of U.S. interests in the discourse, coupled with paternalistic U.S. engagement conditions that extend beyond economic dynamics, has resulted in limited progress in the form of U.S. investments on the continent, as well as alignment of these investments with African priorities, including in the critical minerals sector.[32]

Most recently, the U.S. has partnered with the European Union (EU) to secure critical raw materials produced in the DRC and Zambia for shipment to North America and Europe via the Lobito Corridor.[33] As part of this initiative, the U.S. signed an MoU with DRC and Zambia in 2023 for the development of an Electric Vehicle (EV) value chain in these countries to add value to their critical minerals while de-risking the U.S. supply chain.[34]

Before its expiry, AGOA facilitated mineral trade between AGOA-eligible African countries and the U.S.[35] However, AGOA's structure and product scope did not adequately cater to participation of African countries in the critical minerals value chain, nor did it reflect the U.S.'s industrial and national security needs in its manufacturing sector and energy transition initiatives.[36] This indicates a mismatch of priorities as well as an opportunity to improve the renewed AGOA.

Furthermore, current U.S. legislation obstructs mutually beneficial cooperation between Africa and the U.S. in the development of strategic minerals value chains.[37] For instance, the Inflation Reduction Act (IRA) effectively shuts out African countries as potential manufacturing partners.[38] To fully gain from the IRA's EV tax credits, strategic minerals used must be extracted or processed domestically, or in a country the U.S. has a free trade agreement with. Both criteria exclude African countries.[39]

Moreover, between 2025 and 2032, the U.S. critical mineral sourcing requirements for tax credit benefits will narrow even more, gradually increasing EV component requirements in favour of local industries.[40] Through these provisions, the IRA disincentivises investment by U.S. firms in processing of strategic minerals in Africa, representing a missed opportunity in this area of cooperation.

5.3 Climate cooperation

With just five years remaining to meet the 2030 Sustainable Development Goals (SDGs), the world's stark climate paradox persists: Africa contributes least to climate change yet is facing the most damaging consequences and has the least resources to adapt.

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[32] United States Institute of Peace. (2024, April 9). *Critical minerals in Africa: Strengthening security, supporting development, and reducing conflict amid geopolitical competition*.
[33] Chabala, E. D. W. (2024, February 9). *Lobito Corridor – a reality check*. APRI. Access here.
[34] Ibid
[35] Agoa.info. (n.d.). *Latest news*. Agoa.info - African Growth and Opportunity Act. Access here.
[36] Usman, Z., and Csanadi, A. (2024). *How the AGOA Reauthorization Process Could Help Diversify U.S. Critical Mineral Supplies*. Carnegie Endowment for International Peace. Access here.
[37] Ibid
[38] Usman, Z. (2024, April 30). *How the AGOA reauthorization process could help diversify U.S. critical mineral supplies*. Carnegie Endowment for International Peace. Access here.
[39] Barbanell, M. (2023, May 3). *Overcoming critical minerals shortages is key to achieving U.S. climate goals*. World Resources Institute. Access here.
[40] Ibid

According to the AfDB, climate disasters are costing African countries US$7 billion to US$15 billion each year in loss and damage, with an additional 5% to 15% of GDP spent on recovery.[41] Without accelerated action, by 2030 African countries could be losing US$50 billion every year.

Currently, Africa receives only 11% of the annual climate financing outlined in the Nationally Determined Contributions (NDCs).[42] In addition to a severe climate financing shortage, there are disparities in access to financing across the continent with 50% of climate funding concentrated in just 10 out of Africa's 54 countries.[43]

The lack of urgency in addressing Africa's climate disasters will not only impact African countries but, in time, will affect other regions around the world, including the U.S. The consequences of climate change are not an African problem, but rather a global responsibility.

Since its launch in 2013, Power Africa, a flagship climate adaptation initiative administered by 12 U.S. agencies, has closed 156 transactions and expanded electricity access to over 200 million people in Africa.[44][45] The Biden administration invested over US$193 million in Power Africa.[46] In addition, USTDA has funded a series of feasibility studies for various energy transition projects in different African countries. Furthermore, the DFC, has committed over US$438 million to climate-related projects since 2021.

Although the DFC has made progress in climate-related investments, its funding stagnated between 2022 and 2024, and it remains hesitant to invest in early-stage projects. In 2022, climate change-related assistance was part of the economic development appropriations of U.S. foreign assistance to Africa, and encompassed funding for adaptation, clean energy, and sustainable landscapes. However, climate change-related assistance accounted for just 1.76% of total U.S. foreign aid to Africa. If U.S. climate finance flows continue at this rate, as is likely to be the case under the second Trump administration, Africa's adaptation efforts will be greatly undermined.

The President's Emergency Plan for Adaptation and Resilience (PREPARE) was announced during the U.S.-Africa Leaders Summit (USALS) in 2022 as the administration's flagship program for climate change management in Africa. During the Africa Climate Summit held in Nairobi in 2023, the U.S. announced US$30 million for the PREPARE initiative.

Following that, USTDA hosted the U.S.-Africa Climate Innovation Week in October 2023, bringing together African leaders and decision-makers in the U.S. to explore innovative infrastructure solutions for climate resilience, adaptation, and mitigation. While welcome, these token gestures fall far short of the climate adaptation needs on the continent.

[41] African Development Bank. (n.d.). *AfDB head: To tackle climate, Africa needs finance and more finance*. Access here.
[42] United Nations Development Programme (UNDP). (n.d.). *Africa Investment Insights Report.* Access here.
[43] Kabaiku, J. (2022). *New report finds that climate financing to Africa grew by 48% to US$44 billion in 2021/2022 but still only a quarter of what is required to realise its 2030 goals.* FSD Africa. Access here.
[44] U.S. Agency for International Development (USAID). (n.d.). *Power Africa.* Access here.
[45] *The White House. (2022, December 13). Fact Sheet: U.S.–Africa Partnership in Supporting Conservation, Climate Adaptation and a Just Energy Transition*. Access here.
[46] The White House. (2022, December 13). *Fact Sheet: U.S.–Africa Partnership in Supporting Conservation, Climate Adaptation and a Just Energy Transition.*

Moreover, the limited progress under this initiative is likely to be affected by the Trump administration's hostility toward the climate change agenda, as seen in its sharp criticism of the World Bank and UN's focus on climate change—with significant negative implications for the continent, as earlier stated.

Box 2: President's Emergency Plan for Adaptation and Resilience (PREPARE)

President's Emergency Plan for Adaptation and Resilience (PREPARE)

In 2021, PREPARE was established as part of President Biden's plan to scale up U.S. financing for global climate adaptation to US$3 billion annually. PREPARE is compromised by many U.S. agencies, including USAID, DFC, USTDA, USDA, NASA, Department of State, Department of the Treasury, and the National Oceanic and Atmospheric Administration (NOAA).

PREPARE's three pillars are:

1. Developing climate information centers and early warning systems in 60 percent of Africa;
2. Addressing adaptation constraints in infrastructure, water, health, and food security; and
3. Accelerating adaptation financing, including engaging the U.S. private sector.[47]

While promising, it is too early to gauge its impact. Key efforts so far include:

- Over 30 major companies have responded to PREPARE'S Call to Action to finance adaptation initiatives.[48] Pula, for example, has committed to providing US$20 billion in insurance coverage for 100 million African farmers by 2026.[49]
- The NOAA, NASA, and other agencies committed US$1.5 million to the GEOGlows Streamflow Forecasting Service in Kenya, Botswana, and Tanzania.
- USAID committed a US$10 million in Famine Early Warning Systems Networks in 10 sub-Saharan countries.

[47] U.S. Agency for International Development (USAID). (2024, November 14). *HELPING THE WORLD PREPARE: A primer on U.S. international adaptation and resilience.* Access here.
[48] U.S. Agency for International Development (USAID). (2024, September). *USAID PREPARE: Financing adaptation.* Access here.
[49] The White House. (2023, April 5). *Fact Sheet: Vice President Harris announces over US$7 billion in private sector and U.S. government commitments to promote climate resilience, adaptation, and mitigation across Africa.* Access here.

Chapter 6: Health and Agriculture

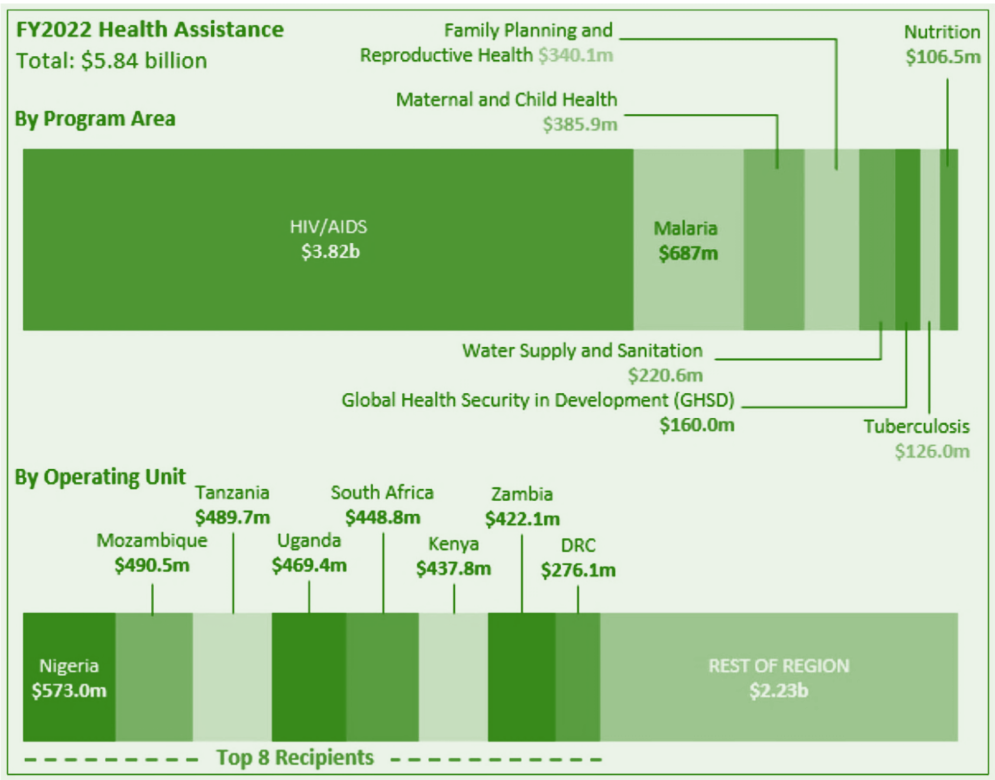
Key takeaways

1. Health cooperation is a longstanding and impactful feature of U.S.-Africa cooperation
2. Health cooperation is mainly driven by ODA flows.
3. There is increasing private sector participation in the health sector through FDI.

6.1 Current dynamics - Health

Cooperation in the health sector has been a key pillar of U.S.–Africa engagement for a long time. Over the past two decades, successive U.S. administrations have maintained a commitment to health cooperation with Africa through sustained funding for various health initiatives as part of official development assistance (ODA) flows. The majority of health ODA targets HIV/AIDS programs, followed by malaria and maternal and child health, which collectively accounted for almost 85% of total ODA flows to health in 2022. The top recipients of U.S. health assistance in 2022 were Nigeria, Mozambique, Tanzania, Uganda, and South Africa, which together accounted for almost 45% of total funding that year.

Figure 26: Breakdown of U.S. Health Assistance to Africa (2022)



Source: U.S. Congressional Research Service

6.1.2 Ongoing initiatives

The Accelerating Primary Health Care Collaborative (APHC-C), PEPFAR's Health Worker Leadership Initiative, and the Health Electrification and Telecommunications Alliance (HETA) are some of the ongoing U.S.-backed initiatives aimed at strengthening Africa's healthcare systems. APHC-C, funded at over US$415 million annually, aims to rebuild primary healthcare systems in five African countries, Côte d'Ivoire, Ghana, Kenya, Malawi, and Nigeria, that were impacted by COVID-19.[50] At the 2022 USALS, the U.S. pledged to scale these efforts by expanding APHC-C's reach to additional countries and strengthening health systems in underserved areas, with a particular focus on community health workers to improve access in rural regions.[51]

Complementing this, PEPFAR has provided over 20 million people across Africa with access to antiretroviral therapy (ART). Through comprehensive prevention programs, PEPFAR has helped prevent millions of HIV infections by distributing 7.4 billion condoms and providing pre-exposure prophylaxis (PrEP) to nearly 1.3 million individuals.[52]

The U.S. Centers for Disease Control and Prevention (CDC) runs the National Public Health Institute (NPHI) Program and Field Epidemiology Training Program (FETP) to build Africa's public health workforce. Since 2021, the FETP has received US$47 million in support of training professionals to respond to health emergencies such as Ebola outbreaks and the COVID-19 pandemic.[53] The Global Laboratory Leadership Program (GLLP), backed by US$5.2 million, aims to strengthen laboratory systems across Africa, focusing on a "One Health" approach to integrate human, animal, and environmental health.[54] These partnerships collectively aim to bolster Africa's health systems and build resilience against public health risks.[55]

As part of the commitments made during the USALS, the U.S. Trade and Development Agency (USTDA) funded several feasibility studies for the construction and/or improvement of healthcare facilities and the provision of health services. In addition, the Transform Health Fund, which was announced at the USALS, closed its first US$50 million deal intended to invest in healthcare solutions across the continent. There has also been progress on the commitment to acquire a portion of antiretrovirals (ARVs) supplied under PEPFAR from manufacturers in Africa.

The Health Electrification and Telecommunications Alliance (HETA), also announced at the 2022 USALS, seeks to electrify and connect 10,000 healthcare facilities across Africa. Operated under the Power Africa initiative, HETA aims to deliver reliable, renewable energy to healthcare facilities using solar photovoltaic systems with battery storage. This will address critical needs such as lighting for surgeries, vaccine refrigeration, and digital connectivity for medical communications. Additionally, HETA's

[50] United States Agency for International Development (USAID). (n.d.). *Accelerating Primary Health Care Collaborative (APHC-C).* Access here.
[51] U.S. Department of State. (2022, December). *U.S.-Africa Leaders' Summit: Investments in health workforce and primary care.* Access here.
[52] U.S. Department of State. (n.d.). *Comprehensive HIV prevention and treatment strategies.* Access here.
[53] Centers for Disease Control and Prevention (CDC). (n.d.). *Field Epidemiology Training Program (FETP).* Access here.
[54] Centers for Disease Control and Prevention (CDC). (n.d.). *Global Laboratory Leadership Program (GLLP).* Access here.
[55] U.S. Agency for International Development (USAID). (2023). *Accelerating Primary Health Care Collaborative: USAID's response to global health needs.* Access here.

telecommunications infrastructure aims to extend mobile network and internet access, supporting modern medical practices in remoteareas.[56]

Box 3: President's Emergency Program for AIDS Relief

Progress Towards UNAIDS 95-95-95 Targets

PEPFAR has been crucial in driving progress toward the UNAIDS 95-95-95 targets, which aim for 95% of people living with HIV to know their status., 95% of those diagnosed to receive sustained ART, and 95% of those receiving treatment to achieve viral suppression. As of 2022, many PEPFAR-supported countries, including Uganda and Kenya, are nearing these goals. In Kenya, 91% of people living with HIV know their status., 95% of those diagnosed are on treatment, and 95% of those on treatment have achieved viral suppression.[57] Uganda has also made strides, with 89% of people knowing their status., 92% on treatment, and 94% achieving viral suppression.[58]

6.2 Current dynamics - Agriculture

U.S.-Africa agricultural partnerships have been an essential part of bilateral relations, especially in addressing food security, sustainability, and agricultural innovation, as well as boosting bilateral trade. Agricultural cooperation is mainly driven by ODA as part of U.S. efforts to alleviate poverty and promote food security among vulnerable communities in Africa. Major U.S.-backed initiatives include:

Table 4: Major Agriculture Initiatives

Initiative	Description	Key Targets	Financial Commitments
Feed the Future & Vision for Adapted Crops and Soils (VACS)[59]	A U.S.-led initiative aimed at combating hunger with a new focus on climate-resilient crops. Developed with FAO and AU.	- Boost crop productivity with climate-adapted varieties - Improve soil health across African regions.	Integrated within the Feed the Future initiative, specific financials not disclosed.
Global Agriculture and Food Security	A program to support food systems and smallholder farmers, enhancing resilience and climate-smart practices.	- Enhance food security by supporting smallholders - Strengthen resilience	US$155 million contribution in 2023. Total of US$300 million disbursed to African countries.

[56] Health Electrification and Telecommunications Alliance (HETA) Fact Sheet," USAID, accessed November 2024, https://www.usaid.gov/sites/default/files/2023-04/HETA-Fact-Sheet-English-April-2023.pdf

[57] UNAIDS. (2022). *Global HIV & AIDS Statistics — Fact Sheet.* Joint United Nations Programme on HIV/AIDS. Retrieved from https://www.unaids.org

[58] Ibid

[59] White House. (2023). *Fact Sheet: U.S.-Africa Partnership in Promoting Two-Way Trade and Investment in Africa*. Retrieved from https://www.whitehoU.S.e.gov/briefing-room/statements-releases/2023/07/26/fact-sheet-u-s-africa-partnership-in-promoting-two-way-trade-and-investment-in-africa

Program (GAFSP)[60]		through climate adaptation strategies.	
Power Africa – Agricultural Electrification	Investment in electrifying 10,000 rural facilities to boost agricultural productivity through energy access.	- Electrify rural health and agricultural centers - Increase reliable energy access for enhanced food storage and irrigation.	US$150 million allocated in 2023, with a focus. on integrating sustainable energy solutions into agricultural practices.[61]
U.S.-Africa Strategic Partnership on Food Security[62]	Partnership launched at 2022 USALS to build resilient, diversified food systems and increase agricultural investment.	- Develop resilient food systems - Encourage policy reforms for sustainable agriculture.	Collaboration-driven; specific financials not disclosed.

Box 4: Vision for Adapted Crops and Soils (VACS)

The Vision for Adapted Crops and Soils (VACS) was launched in 2023 as a collaborative effort between the U.S., the UN's Food and Agriculture Organization (FAO), and the AU. This initiative builds on the established Feed the Future framework and aims to support African agriculture by promoting crop varieties resilient to climate stressors while improving soil health across diverse agro-ecological zones in Africa.

Objectives

- **Climate-Resilient Crops**: Develop and distribute crop varieties that are well-suited to Africa's diverse environmental conditions, with a focus. on crops adapted to drought, pests, and other climate-related challenges.
- **Soil Health Improvement**: Promote sustainable soil management practices to improve agricultural productivity and reduce soil degradation in African farming communities.
- **Community Training and Capacity Building**: Educate local farmers and agricultural stakeholders on best practices for climate-smart agriculture, including crop rotation, soil preservation, and efficient irrigation.

VACS has conducted pilot projects in several African countries, including Kenya, Nigeria, and Ethiopia, which focus on crop research, soil testing, and the distribution of improved crop varieties.

[60] The White House. (2023, January 1). *Fact Sheet: Accelerating the U.S.–Africa Partnership after the 2022 U.S.-Africa Leaders' Summit.* Access here.
[61] United States Institute of Peace (USIP). (2024, August). *The Lobito Corridor: A U.S. bet on Africa's critical mineral development.* Access here.
[62] The White House. (2023, July 26). *Fact Sheet: U.S.–Africa Partnership in promoting two-way trade and investment in Africa.* Access here.

It also involves local universities and research institutions to support agricultural education and innovation.

Since its launch, VACS reports increased improvements in crop yield for drought-resistant varieties tested in pilot locations. In Kenya, for instance, maize and millet yields have increased by 20% in regions where VACS practices have been adopted. Improved soil testing has resulted in higher soil organic matter and reduced erosion, enhancing long-term soil fertility. Smallholder farmers have reported increased income due to higher crop productivity and reduced losses from climate-related factors.

Chapter 7: People to People Flows

Key takeaways

1. There were 64,000 African students in the U.S. as of 2024.
2. As of 2020, over 12,000 Africans benefitted from the Fulbright program which facilitates educational exchanges between Africans and Americans.
3. In 2023, Africa accounted for just 1.6% of total U.S. outbound travel, and just 0.8% of total U.S. outbound tourist travel, dominated by leisure travel, with South Africa, Kenya, and Tanzania hosting the largest numbers.

7.1 Current Dynamics

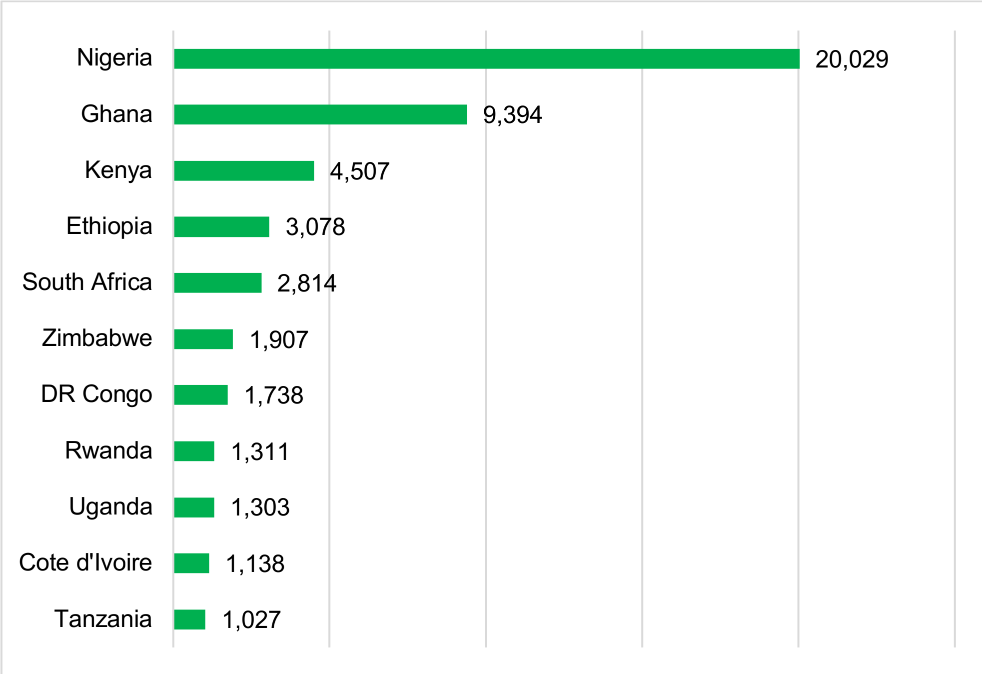
People-to-people exchanges[63] have become an important focus of U.S.-Africa relations in recent years, especially as both regions look to deepen their diplomatic, economic, and cultural ties. Several bilateral and multilateral initiatives have been launched to enhance these flows, with commitments made in areas such as education, business development, and cultural exchange.[64]

7.1.1 Educational Exchanges

The U.S. is one of the leading destinations for African students studying abroad. In 2024, an estimated 64,290 African students were enrolled in U.S. colleges and universities.[65] However, recent changes to the H1-B visa are likely to affect the ability of Africans to work in the U.S. due to reduced job prospects.

Figure 27: Top African Countries by Number of Students Studying in the U.S. (2024)

[63] Refers to the movement of people between the U.S. and Africa for educational, tourism and business purposes.
[64] However, the new Trump administration has thrown a spanner in the works with its anti-immigration policies that threaten to restrict the ability of Africans to travel to the U.S.
[65] Institute of International Education. (2024, November). *Open Doors 2024: Fact sheets — Regions.* Access here.



Source: WITS

In addition, the U.S. government promotes educational exchanges with African countries through various programs, most notably the Fulbright Program, which facilitates academic exchanges, sending African scholars to the U.S. and sending American academics to African institutions. As of 2020, over 12,000 Africans had benefited from the Fulbright Program.[66] In addition, the Young African Leaders Initiative (YALI) has brought over 6,500 young African leaders from across the continent to the U.S. for academic and leadership exchanges.[67]

These flagship programs are supplemented by other exchanges such as the Community College Initiative and the International Visitor Leadership Program (IVLP), which provide opportunities for African students and professionals to gain technical skills and form collaborative networks in the U.S.[68]

7.1.2 Business and Entrepreneurship Development

The U.S.-Africa Business Forum (USABF) and the Global Entrepreneurship Summit (GES) were set up to foster better business relations between the U.S. and African countries. Launched in 2014, USABF promotes partnerships between U.S. and African businesses, spanning the technology, finance, and healthcare sectors. During the 2016 USABF, U.S. companies signed new deals worth over US$14 billion with African partners across these key sectors.[69]

In 2022, the forum renewed its commitment to expanding partnerships with a focus on digitisation, climate resilience, and healthcare development in Africa.[70] Comparatively, GES, is hosted by the U.S.

[66] U.S. Department of State. (2020). *Fulbright Program Overview*. Access here.
[67] YALI Network. (2021). *Young African Leaders Initiative Overview*. Access here.
[68] U.S. Department of State, Bureau of Educational and Cultural Affairs. *International Visitor Leadership Program (IVLP).* Access here.
[69] U.S. Chamber of Commerce. (2017). *U.S.-Africa Business Forum: A Platform for Partnerships.* Access here.
[70] U.S. Chamber of Commerce. (2022). *U.S.-Africa Business Forum Overview.* Access here.

Department of State in partnership with countries around the world, has included a focus on African entrepreneurs. The 2015 summit, held in Nairobi, Kenya, brought together over 1,000 entrepreneurs and investors from across Africa and the U.S., facilitating partnerships and investment in African start-ups. The GES has since provided African entrepreneurs with access to global investors, enabling them to scale their businesses through mentorship, networking, and investment opportunities.[71]

7.1.3 Cultural Diplomacy

Cultural diplomacy continues to play an important role in enhancing U.S.-Africa people-to-people ties. Programs such as the IVLP and cultural exchange grants funded by the U.S. Department of State bring African artists, civil society leaders, and cultural influencers to the U.S. for short-term exchange programs. These initiatives contribute to building cross-cultural understanding and foster collaboration in areas such as the arts, music, and sports.

In 2019, approximately 800 African leaders from 48 African countries participated in the IVLP, representing sectors such as government, civil society, education, and the arts. African participants account for roughly 15-20% of the overall yearly IVLP intake, making Africa a key focus region for this initiative.[72]

Until its disbandment in January 2025 through an executive order by President Trump, the Presidential Advisory Council on African Diaspora Affairs, announced during the 2022 USALS, represented an important step forward in fostering stronger ties between the U.S. and African diaspora communities. The council provided a formal platform for diaspora leaders to offer insights on engaging with African communities both within the U.S. and across the African continent.

By drawing on the wealth of experience and networks of the African diaspora, the Biden administration had sought to amplify its economic, cultural, and social connections with African countries, further advancing mutual understanding and collaborative initiatives for sustainable development.[73] U.S. lawmakers have introduced the African Diaspora Council Act to institutionalise the council's work. The bill would also ensure that the selection of council members remains nonpartisan, safeguarding its long-term role in advancing U.S.-Africa relations.[74]

[71] U.S. Department of State. (2015). *Global Entrepreneurship Summit Overview*. Access here.
[72] U.S. Department of State. (2020). *International Visitor Leadership Program Overview.* Bureau of Educational and Cultural Affairs. Access here.
[73] Presidential Advisory Council on African Diaspora Affairs," U.S. Department of State. Access here.
[74] Kamlager-Dove, Jacobs Introduce Bill to Protect African Diaspora Council," The Hill, November 2024. Access here.

Box 5: Young African Leaders Initiative

The Young African Leaders Initiative (YALI) is a flagship program launched by the U.S. government in 2010 under the Obama administration to support young African leaders through leadership training, networking, and skills development. The initiative aims to foster leadership in business, civic engagement, and public management, empowering Africa's next generation of leaders.

Key Components:

- Mandela Washington Fellowship: Each year, around 700 young African leaders are brought to the U.S. for a six-week leadership program hosted by U.S. universities. The program focU.S.es on leadership, entrepreneurship, and community service, while providing networking opportunities with U.S. professionals and policymakers.
- Regional Leadership Centers (RLCs): Located in South Africa, Kenya, Senegal, and Ghana, these centres provide leadership training for young Africans unable to travel to the U.S. The centres focus. on business and entrepreneurship, civic leadership, and public management, ensuring that leadership training is accessible across the continent.

YALI has trained over 20,000 young African leaders through the Mandela Washington Fellowship and the Regional Leadership Centers. These alumni have returned to their countries to lead businesses, civic projects, and government initiatives.

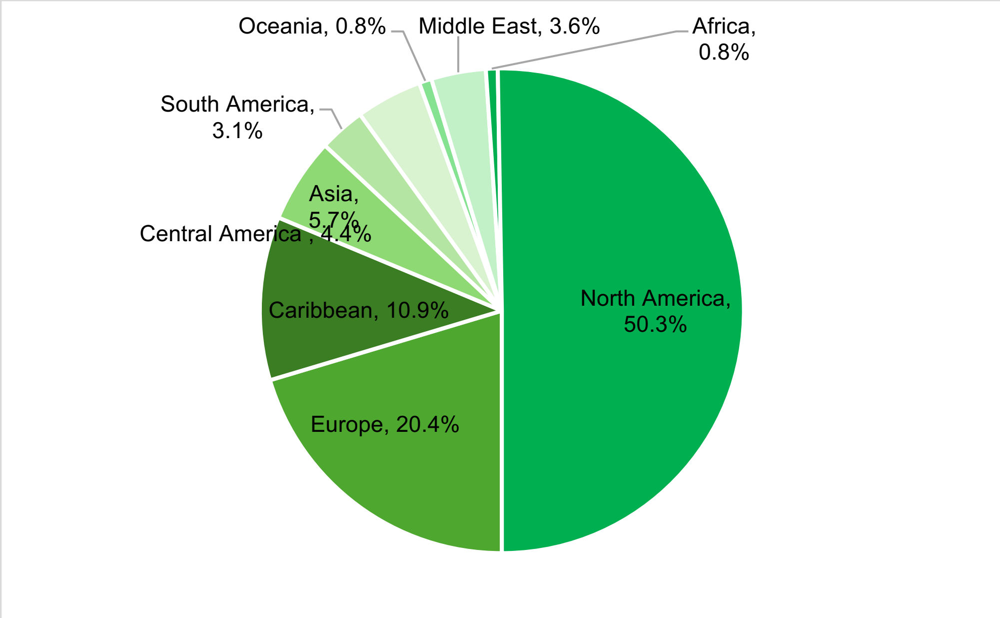
7.2 Tourism flows

Tourism between the U.S. and African countries is driven by increased interest in cultural, heritage, and eco-tourism, alongside more traditional safari-based travel. While the current volume of tourism remains modest compared to other global destinations, there are signs of expanding interest from both U.S. travelers to Africa and, to a lesser extent, African travelers to the U.S.

Africa remains a relatively minor destination for American tourists compared to regions like Europe or the Caribbean.[75] In 2023, Africa accounted for just 0.8% of total U.S. outbound travel. Of those U.S. citizens visiting African countries, the majority travelled for leisure, with destinations such as South Africa, Kenya, and Tanzania attracting the largest share of American tourists.[76] Other destinations such as Egypt and Morocco, with their rich historical and cultural heritage, have also drawn significant numbers of U.S. visitors.

[75] U.S. Outbound Travel Statistics," National Travel and Tourism Office, U.S. Department of Commerce. Access here.
[76] Statista. (2019). *Number of U.S. Citizen Monthly Travel to Africa.* Access here.

Figure 28: Regional Distribution of U.S. Outbound Travel in 2023



Source: U.S. International Trade Administration

1. **African Tourism to the U.S.**

African tourism to the U.S. remains limited, presenting a largely untapped opportunity. African travelers to the U.S. typically include business professionals, students, and family visitors rather than leisure tourists. There is potential to expand African tourism to the U.S. as a destination for leisure travel, particularly in areas of cultural exchange, heritage sites, and major urban centers like New York, Washington, D.C., and Los Angeles. With more streamlined visa policies and targeted marketing, the U.S. could position itself as a leisure destination for Africa's growing middle class.[77]

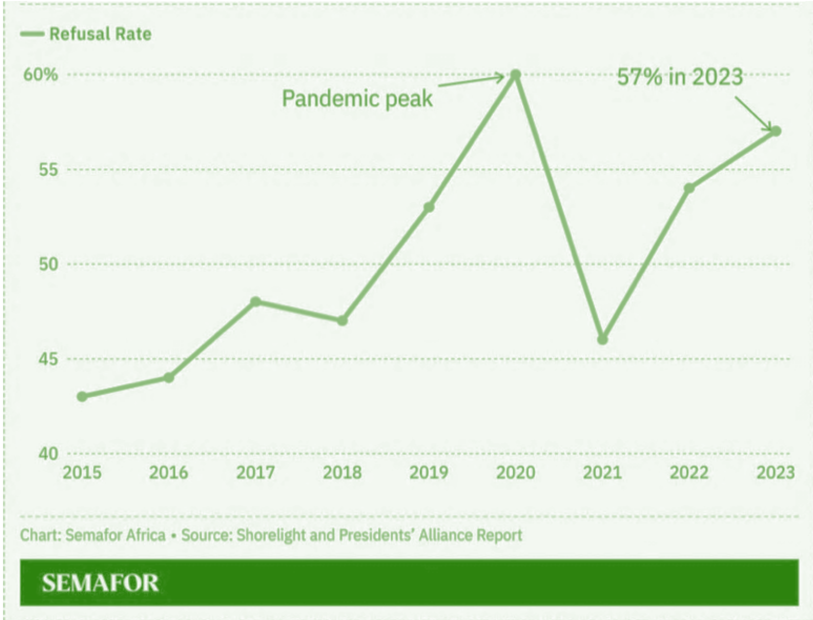
2. **Visa Delays and backlog:**

Delays and denials in visa processing remain a stumbling block for Africa–U.S. travel. African applicants for U.S. visas face higher rejection rates relative to their peers from other regions. African students applying to study in the U.S. are the most disproportionately affected.[78]

In 2023, almost 60% of all African students who applied for a U.S. student visa had their applications rejected. This rate has been above 40% throughout the last decade ,as shown in figure 29.[79] In addition, the huge backlog in visa processing has resulted in lengthy delays for African students, business professionals, and tourists. Furthermore, U.S. visa policies further complicate the application process for African travellers. For example, in many African countries, applicants face high visa rejection rates, particularly for tourist visas, which can dissuade would-be travellers and professionals from even attempting to engage in U.S.-based opportunities. For instance, Nigerian visa rejection rates were above 50% in 2020, largely due to concerns about potential visa overstays.[80]

[77] Brookings Institutions. (2020). *Challenges in U.S.-Africa Relations.* Access here.
[78] Rajikah et al. (2023). An analysis of visa denials and international student flows to the U.S. Access here.
[79] Semafor. (2024). *US High Rejections of African Student Visa Steadily Rising.* Access here.
[80] U.S. Government Accountability Office (GAO). (n.d.). *U.S. visa delays and rejection rates: Barriers to African mobility.* Access here.

Figure 29: F-1 Visa Refusal Rate for African Student Applicants



Source: Shorelight and Presidents' Alliance Report

In addition, direct flights between the U.S. and African countries are limited. Only Ethiopian Airlines, Delta Air Lines, Kenya Airways, and South African Airways offer direct routes from select U.S. cities (New York, Washington D.C., and Atlanta) to African hubs such as Addis Ababa, Johannesburg, Nairobi, and Accra. However, flight costs remain prohibitively high compared to other international destinations, which limits the flow of tourists in both directions.[81] A round-trip economy ticket from New York to Johannesburg averages around US$1,200-1500, while flights to European destinations like London or Paris often range from US$500-700, depending on the season.[82] These elevated costs for African routes are driven by factors including limited competition, longer flight distances, and fewer available routes, which create barriers to affordable travel.[83] Furthermore, Africa's tourism potential is underpromoted in the U.S. The focus has traditionally been on safari tourism in East and Southern Africa, with limited marketing of cultural, historical, and eco-tourism opportunities in West Africa, North Africa, and other regions.

[81] World Tourism Organization (UNWTO). (2021). *Tourism trends in Africa: Addressing connectivity challenges.* Access here.
[82] Flight Prices for Popular Routes: U.S. to Africa vs. Europe," Skyscanner, accessed October 2024, https://www.skyscanner.com.
[83] Skyscanner. (n.d.). *Flight prices for popular routes: U.S. to Africa vs. Europe.* Access here.

Chapter 8: Security Cooperation

Key takeaways

1. U.S.-Africa cooperation in the peace & security sector takes four main forms: conflict prevention & resolution; coordination and capacity building.
2. The U.S. Africa Command (AFRICOM) is the major platform through which the U.S. engages with African countries on matters concerning its security interest.
3. There is growing realisation that peacebuilding is a more effective approach than military interventionism on the war on terror in Africa.

8.1 Current Dynamics

The contemporary security context in Africa is dynamic, with African countries facing asymmetrical and multidimensional security threats posed by non-state actors, extremist insurgent groups, foreign-backed actors, and, in some cases, weak states. African governments and institutions have been proactive in designing multilateral solutions to address these challenges. Through the African Peace and Security Architecture (APSA),[84] the AU Peace and Security Council (PSC) works to promote conflict prevention and resolution. As of 2023, the AU and regional partners oversee 10 peace operations, comprised approximately 70,000 personnel working across 17 African countries.[85]

Challenges of limited operational capabilities and poor integration with civilian-led conflict resolution efforts notwithstanding, African-led interventions in conflicts on the continent have proved effective owing to their ability to deploy quickly in 'hot zones', their contextual understanding of local dynamics, greater doctrinal flexibility, and a lower cost relative to UN-led missions. As Africa becomes a ground for contestation between major world powers, the potential and effectiveness of African-led solutions to the continent's security challenges are being undermined. Yet, many years of security-force interventions, mostly backed by U.S. and European governments, have not proven as effective promoted. The U.S. and its European allies also have vast military establishments, engagements, and installations across Africa, which have received varied levels of acceptance from local populations.

In 2023, the UNSC adopted a resolution to create a framework to fund AU-led peace operations. The initiative obliges the UN to provide up to 75% of the AU mission's annual budget. However, the resolution is not a fix-all solution because core misalignments between the UNSC and the AU remain unaddressed. This is most apparent in the growing calls for greater African representation in the UNSC. The U.S. government has also announced that it will support a version of UNSC reform that provides two permanent seats for African countries, albeit without veto power. This contradicts the African position, which calls for full rights and privileges, including veto power, as contained in the Ezulwini Consensus and the Sirte Declaration.

[84] Peace AU. (2012). *The African Peace and Security Architecture (APSA).* African Union. Access here.
[85] Allen, N. D. F. (2023). *African-led peace operations: A crucial tool for peace and security.* Africa Centre for Strategic Studies. Access here.

8.2 U.S.-Africa Security Engagement

The U.S. Africa Command (AFRICOM) is the major platform through which the U.S. engages with African countries on matters concerning its security interests, which it seeks to promote through strategic cooperation with African governments. According to the U.S. government, African leadership is key to addressing challenges related to global peace and democratic governance. This is because stable African nations are a net positive for the global community in terms of trade, security, and development. As such, the U.S. has engaged in several initiatives in partnership with African countries in the peace and security sector. Current U.S.-Africa cooperation in this area takes four main forms: conflict prevention and resolution, coordination, capacity building, and training.

1. **Conflict prevention & resolution**

Through the Prevention and Stabilisation Fund, the U.S. is investing US$58.5 million to boost peace and stabilisation partnerships with Mozambique, Libya, and the coastal West Africa countries of Benin, Cote d'Ivoire, Ghana, Guinea, and Togo.[86] The U.S. has also introduced several programs such as the 21st Partnership for African Security, a US$100 million, three-year pilot initiative; the U.S. Strategy on Women, Peace and Security; and various civil society partnership projects. These are in addition to existing military assistance programs under AFRICOM and CENTCOM. The U.S. has also participated in several conflict resolutions processes in Africa, such as South Sudan. Most recently, in February 2024, the U.S. pushed for the UNSC to take action toward ending the conflict in Sudan.[87]

2. **Coordination**

In terms of maritime security, the joint U.S.-Africa exercises – Obangame Express, Pheonix Express and Cutlass Express – focus on countering piracy, smuggling, and other maritime security challenges. Furthermore, Operations FLINTLOCK and AFRICAN LION are special operations exercises concentrating on the Sahel region. The AFRICOM Commander, Stephen Townsend, described AFRICAN LION as a "multi-domain, full-spectrum exercise drawing troops from 34 nations", adding that it is "good both for African partners and for the United States' forces readiness".[88]

Through the African Land Forces Summit (ALFS), the leaders of African and U.S. land forces convene to discuss challenges and opportunities confronting armies in Africa. The 12th ALFS, held in Zambia, brough together military leaders from Africa, Europe, and the U.S. At the end of the Summit, the U.S. Department of Defense announced two new state partnership programs: one between North Carolina and Zambia, and another between North Carolina and Malawi.[89]

More recently, the annual African Senior Enlisted Leader Conference took place in Malawi in September 2024 under the auspices of AFRICOM.[90] It is geared toward building collaboration between U.S. and African militaries, especially at the officer level. Additionally, there is a NATO dimension to this cooperation through the Defense Education Enhancement Program (DEEP), which is designed by NATO to assist partners in transforming their militaries.

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[86] The White House. (2022, December 15). *Fact Sheet: U.S.–Africa Partnership in promoting peace, security, and democratic governance.* Access here.
[87] U.S. Department of State. (2024). *United States provides nearly $154 million for humanitarian assistance in Ethiopia.* Access here.
[88] White House (2022) FACT SHEET: U.S.-Africa Partnership in Promoting Peace, Security, and Democratic Governance. WH.GOV. Access here.
[89] Olay, M. (2024). *U.S., Zambian armies kick off Land Forces Summit.* U.S. Department of Defense. Access here.
[90] defenseWeb (2024). *Thirty African militaries at senior enlisted leader conference*. DefenseWeb. Access here.

3. **Capacity building**

The partnership commitments between the U.S. and African countries are further bolstered by the Africa Contingency Operations Training and Assistance (ACOTA) program. Funded by the U.S. State Department, this program provides equipment and training for existing peacekeeping operations and exercises. According to AFRICOM, ACOTA has been a key factor in the success of AMISOM and the Africa Partnership Station (APS), the flagship maritime cooperation program for naval forces of the U.S., Africa and Europe. The main aim of the Africa Partnership Station is to develop maritime domain awareness, building maritime security professionals, strengthen response capabilities and maritime infrastructure, and support regional integration.

Figure 30: Known U.S. Foreign Military Bases in Africa

Chapter 9: Key Challenges in U.S. Africa Relations

1. **Misalignment between Africa and U.S. priorities**

There is often misalignment between U.S. and African priorities, largely due to the frequent disregard for Africa's strategic interests. For instance, U.S. development finance initiatives and programs often prioritise U.S. interests and foreign policy objectives, which may not always align with the development priorities identified by African countries themselves. In addition, there is limited African ownership and leadership in the design and implementation of these initiatives. This misalignment reduces the effectiveness of U.S. engagement in Africa.

2. **Limited knowledge of Africa's diversity**

U.S. engagement with African economies has historically been narrow and selective, with a tendency to focus on a few countries and sectors considered to be of strategic importance to the U.S. This "picky" approach reflects a lack of nuanced understanding of Africa's diverse and evolving economic landscape. By concentrating political and commercial attention on a handful of "darlings," the U.S. has overlooked emerging and high-potential markets across the continent, thereby limiting its economic and strategic footprint, missing opportunities to build resilient, diversified partnerships, and reinforcing perceptions of U.S. disengagement and inflexibility. This structural knowledge gap constrains the ability of U.S. policymakers and businesses to engage with Africa as a dynamic, multi-market continent rather than as a few favored partners.

3. **Inconsistency in enforcement**

U.S. engagement in Africa suffers from inconsistency, which undermines the trust and predictability needed for long-term strategic cooperation. For instance, the U.S.–Africa Leaders Summit (USALS) has been held just twice in eight years, representing a missed opportunity for sustained high-level diplomatic engagement. Whereas the U.S. insists on democratic governance as a precondition for cooperation, this principle is selectively applied across Africa as well as between African countries and the U.S.'s other allies. As a case in point, while some African countries have been stripped of their AGOA eligibility due to governance and human rights concerns, other countries with less favorable records continue to benefit from the same program.

4. **A fragmented approach**

U.S. engagement in Africa is fragmented across a multitude of initiatives and agencies that lack coherence and effective coordination. For example, funding is dispersed through over 25 different departments and agencies, which makes cooperation prone to the complexities of over-bureaucratisation such as delays, inefficiency, and duplication of effort. Furthermore, the U.S. insists on dividing Africa into North and Sub-Saharan regions, which undermines the continent's integration agenda as well as the effectiveness of U.S.–Africa engagement.

This fragmented approach limits the potential of otherwise potent U.S. tools for engagement in Africa, including the Millennium Challenge Corporation (MCC) and the Development Finance Corporation (DFC). The challenge of fragmentation is prevalent on the African side as well: African countries engage the U.S. primarily on a bilateral basis, with little to no continent-wide effort—let alone a unified strategy—for Africa as a whole to engage the U.S. For instance, AGOA was primarily a U.S. initiative and has suffered from the lack of a continental lobbying effort for its reauthorisation.

5. **Misleading risk perceptions**

Despite the vast economic potential and improving investment climate in many African countries, outdated perceptions of high risk discourage U.S. investors and lenders, thus limiting the flow of capital into Africa and hindering its growth and development trajectory. This risk perception stems from a general lack of understanding of African markets and awareness of investment opportunities, which is reinforced by negative portrayals of Africa in major U.S. media outlets.

The 'America-first' policy pursued by the Trump administration will further complicate the U.S. Africa partnership through:

1. **Discontinuity and uncertainty**

The Trump administration has upended U.S. foreign policy in general, and U.S.–Africa policy in particular. The resulting uncertainty complicates engagement between the U.S. and African countries.

2. **Disregard**

Africa has traditionally been low on the U.S. foreign policy priority list. This is likely to worsen under the Trump administration, which, both now and in the past, has exhibited disregard, and even disdain, for African countries, referring to them in disparaging ways, as in comments about Lesotho. This will make it even harder for African leaders to secure meaningful engagement with their U.S. counterparts to advance the continent's interests.

3. **Transactionalism**

The Trump administration's proclivity for a transactional approach to diplomacy prioritises bilateral engagement over multilateralism. This presents a serious challenge for the African continent, which is working hard to forge economic and political integration. The reported likelihood of recognising Somaliland—a breakaway region of Somalia—as well as the continued distinction between North and Sub-Saharan Africa by the Trump administration, will undermine Africa's integration agenda and its ability to promote and secure its interests vis-à-vis the U.S.

4. **Aggression**

Unlike previous U.S. administrations, the Trump administration is not shy about wielding U.S. power in overt and coercive ways. For instance, the U.S. has leveraged its influence to coerce allies such as

Canada, Mexico, India, and the EU to fall in line with its agenda through the imposition of steep tariffs. In an attempt to influence domestic South African politics, President Trump signed an executive order targeting South Africa by freezing all foreign aid to the country. African countries now face a more assertive and audacious Washington that is not shy about using sticks more than carrots to cajole partners. In a world of bold realpolitik, it will be more challenging to find common ground to advance shared interests.

5. Misalignment

In many ways, the 'America-first' foreign policy agenda of the Trump administration is at odds with Africa's interests. U.S. withdrawal from international climate agreements poses challenges for climate financing, which African countries are in dire need of. U.S. retreat from multilateral institutions threatens reduced or restricted contributions by the U.S. to Africa-focused multilateral funds such as the ADF, where the U.S has been a major contributor. Furthermore, the U.S. disavowal of the SDGs undermines Africa's quest for sustainable development to eliminate poverty and improve livelihoods.

Conclusion

The evolution of U.S.–Africa relations over the past quarter century reveals a complex and uneven partnership, shaped by shifting global dynamics, domestic politics in Washington, and Africa's own changing development priorities. From an initial focus on aid and humanitarianism to recent overtures toward trade and strategic competition, the relationship has oscillated between paternalism and pragmatism. Yet, despite multiple high-level summits and evolving rhetoric about "partnership," the structure of engagement continues to reflect U.S. priorities more than Africa's.

The analysis across this report, spanning trade, finance, infrastructure, health, agriculture, people-to-people exchange, and security, illustrates both the resilience of U.S. interests and the persistent struggle of African states to assert collective agency in shaping the agenda.

A key turning point in this trajectory is the transition from multilateral engagement under the Biden administration to the more transactional, bilateral approach of the second Trump administration. The withdrawal of U.S. funding for key multilateral institutions, the discontinuation of reporting on the 2022 USALS commitments, and the indefinite postponement of the 2025 Summit have disrupted the limited momentum achieved in recent years. Although U.S. policy under Trump 2.0 emphasises "commercial diplomacy", the drastic contraction in foreign assistance and the rollback of collaborative mechanisms risk eroding the very foundations of the relationship. For many African countries, the abrupt policy reversal creates uncertainty and underscores the dangers of dependency on U.S. political cycles rather than predictable, rules-based cooperation.

Trade remains one of the most visible yet paradoxical aspects of the U.S.–Africa relationship. Despite rhetorical emphasis on "trade, not aid", total trade volumes have grown only modestly over the past two decades and have declined sharply since 2008. The expiry of AGOA without renewal has further narrowed the channels for African exports. AGOA's design, dominated by primary commodities and benefiting a handful of countries, failed to catalyse structural transformation or value-added exports. Meanwhile, U.S. preference for bilateral trade agreements and tariff reciprocity undercuts the principle of special and differential treatment that underpins Africa's industrial ambitions. Going forward, African states must use the opportunity of AGOA's expiration to rethink engagement with the United States on trade in ways that align with the AfCFTA and prioritise regional value chains.

Financial cooperation has been equally uneven. While total ODA rose from US$3.3 billion in 2000 to nearly US$16 billion in 2024, these flows were heavily concentrated in humanitarian and health programs rather than productive investment. The dominance of aid has reinforced a dependency dynamic, with limited impact on Africa's structural transformation. FDI stocks have grown but remain small relative to U.S. global investments and are concentrated in extractives and a few countries. The DFC's focus on mining and finance, rather than manufacturing or renewable energy, reflects a continuation of U.S. commercial interests rather than alignment with Africa's development plans. Debt relief initiatives, while symbolically important, have been sporadic and often linked to conditionalities that privilege creditor interests. A more balanced partnership requires the U.S. to pivot from aid dependency to productive, mutually beneficial financing that supports Africa's industrialisation, regional integration, and green transition.

Infrastructure and energy cooperation demonstrate the most promising yet constrained frontier in U.S.–Africa relations. Projects such as the Lobito Corridor and the growing role of the DFC and USTDA indicate a renewed willingness to invest in connectivity, logistics, and clean energy. However, the scale of U.S. involvement remains modest compared with Africa's needs. Moreover, U.S. legislation—particularly the Inflation Reduction Act—effectively excludes African countries from key clean energy value chains by limiting eligibility for tax incentives to domestic or free-trade-partner sources. Without reforms to such frameworks, the potential for Africa to become a partner in the global energy transition rather than a raw-material supplier will remain unrealised.

Health and agriculture continue to be areas where U.S. engagement has delivered tangible outcomes. Programs such as PEPFAR, Feed the Future, and the Vision for Adapted Crops and Soils have improved health indicators, strengthened food systems, and enhanced climate resilience in parts of the continent. Yet, these initiatives still largely reflect the aid-driven, donor–recipient paradigm. The termination of U.S. funding for the World Health Organization (WHO) and the downsizing of assistance under Trump 2.0 threaten to undo decades of progress in health systems strengthening. The challenge for African governments is to leverage past achievements to negotiate more sustainable, co-owned health and agricultural partnerships that emphasise local manufacturing, technology transfer, and resilience.

People-to-people exchanges have emerged as a vital, if underappreciated, dimension of U.S.–Africa relations. Educational and leadership programs such as YALI, Fulbright, and the Mandela Washington Fellowship have built enduring networks of African professionals and U.S. partners. These human connections may ultimately prove more durable than the volatile politics of official diplomacy. However, the dissolution of the Presidential Advisory Council on African Diaspora Engagement undercuts a growing avenue for transnational collaboration. Re-institutionalising diaspora engagement and expanding academic and cultural exchanges could anchor the relationship in constituencies beyond government.

In the realm of peace and security, the U.S. remains a key partner through AFRICOM and related defence cooperation. However, the securitisation of U.S. policy, often driven by counterterrorism rather than African security priorities, has produced mixed results. Stability in the Sahel, Horn of Africa, and Great Lakes regions remains elusive. The future of security cooperation should therefore emphasise capacity building, regional coordination, and the alignment of U.S. support with African-led frameworks such as APSA.

Across all these, a consistent theme emerges: the asymmetry of power and agenda-setting between the United States and African countries. While the U.S. has alternated between moralistic and strategic motivations, values promotion, counterterrorism, and now great-power competition, African governments have often responded reactively rather than proactively.

The lesson of the current moment is that Africa must organise collectively to define its interests and negotiate accordingly. The fragmentation of African engagement across 54 bilateral relationships leaves the continent vulnerable to external leverage and policy inconsistency. By contrast, coordinated continental and regional strategies, anchored in the AU, AfCFTA, and Agenda 2063, can provide the leverage necessary for a more balanced partnership.

Ultimately, U.S.–Africa relations stand at a crossroads. The end of AGOA, the rollback of foreign assistance, and the re-emergence of transactional diplomacy could entrench old patterns of dependency and marginalisation. Yet, this moment also offers an opportunity for recalibration. A truly modern partnership would move beyond aid and competition to focus on co-investment in industrialisation, technology, and human capital. For the U.S., this means recognising Africa not merely as a theatre of geopolitical rivalry but as a vital partner in shaping a stable, prosperous, and sustainable global order. For Africa, it means asserting agency, through collective diplomacy, strategic alignment, and disciplined engagement, to ensure that future relations serve the continent's long-term transformation rather than short-term expediencies. Only through such recalibration can the rhetoric of partnership be matched by reality.