



Innocent Bystanders

Why the U.S.-China Trade War Hurts African Economies

By Judd Devermont & Catherine Chiang

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THE ISSUE

- Sub-Saharan African countries are experiencing economic distress from the U.S.-China trade war. Although not the target of the trade dispute, U.S. tariffs have precipitated drops in commodity prices, local currencies, and major stock exchanges. African Development Bank experts warn that the trade tensions could cause a 2.5 percent reduction in GDP in resource-intensive African countries and a 1.9 percent reduction for oil exporters by 2021.
- The tariff tensions also risk indirectly undercutting U.S. goals of promoting African self-reliance, increasing U.S.-Africa trade and investment, and countering China's expanding influence on the continent. U.S. protectionism, called out by several African leaders as destructive to their economies, risks adding to the perception that the United States is apathetic toward the region. Meanwhile, Beijing has used the trade war to sow anti-U.S. sentiment and bolster its image as Africa's favored foreign partner.
- As the U.S.-China tariff negotiations proceed, the U.S. government should seek to counterbalance the trade war's negative effects on sub-Saharan Africa. There are a series of measures available to Washington to strengthen its U.S.-Africa strategy, including through its Prosper Africa initiative, and resolve the contradictions surfacing between its global and regional policies.

A trade war is being stoked between the two largest economies of the world. The consequences will affect those who have had no say, including small countries like Ghana . . . These events provide proof, if some were needed, that ours is an inter-dependent world.

- President of Ghana Nana Akufo-Addo¹

Speaking at the United Nations General Assembly, President Nana Akufo-Addo of Ghana warned of the repercussions of escalating U.S.-China trade tensions on African nations. Although largely absent from the discourse surrounding the so-called “trade war,” sub-

Saharan Africa has suffered from its impacts. Uncertainty hovering over global and African markets has already undermined investor confidence, triggering drops in commodity prices and local currencies. A slowdown in Chinese production and global growth could threaten to throw African markets further off balance.

U.S. protectionist measures stand out for their repercussions on African economies and U.S.-Africa relations. Tariff tensions risk indirectly undercutting U.S. goals of promoting African self-reliance, increasing U.S.-Africa trade and investment, and countering China's expanding influence on the continent.

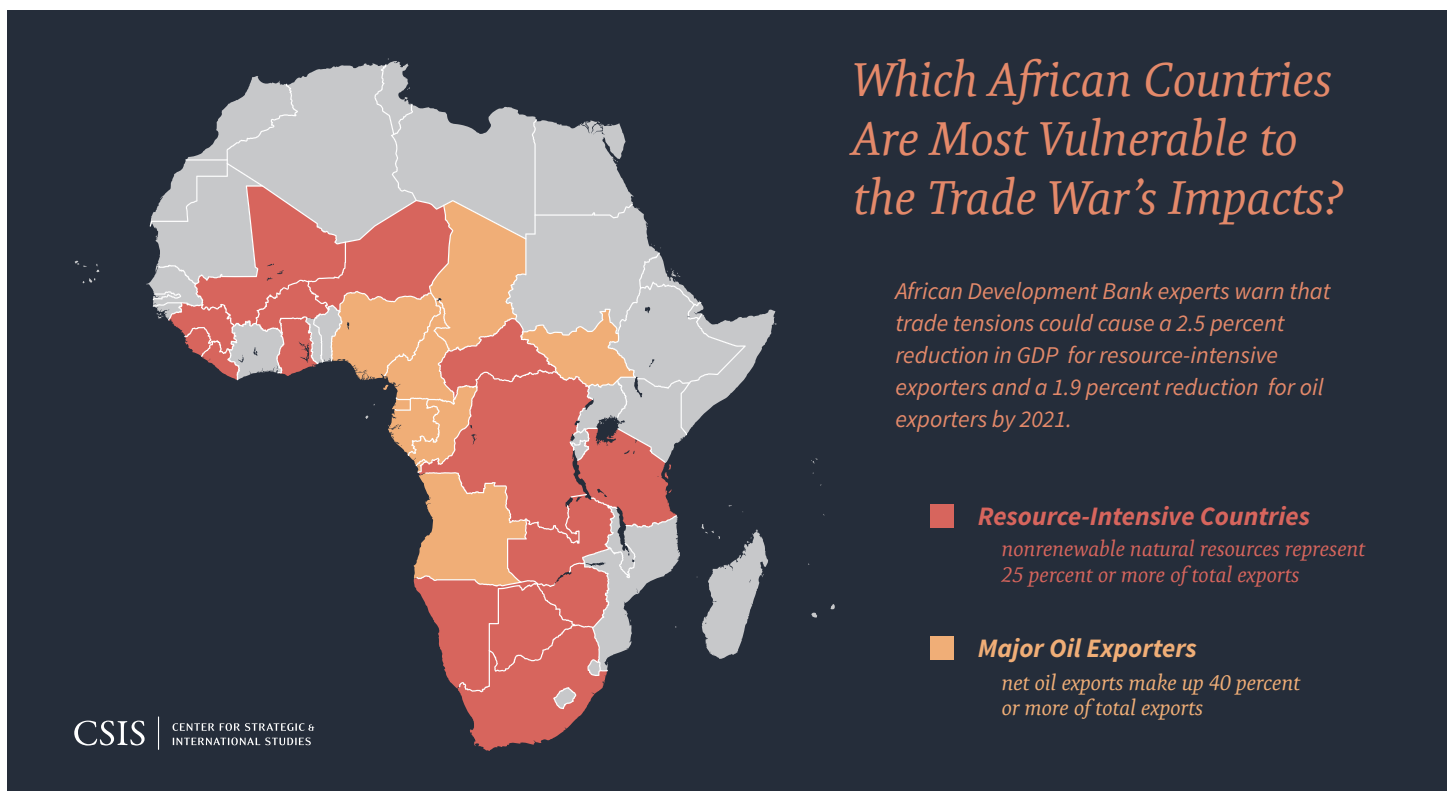
TARIFFS AGGRAVATE WEAKNESSES IN AFRICAN ECONOMIES

In 2018, the Trump administration's trade measures sent ripples through the global economy. Washington tacked tariffs on 14.9 percent of U.S. imports, arguing that competitive imports from China, the European Union, Canada, and other major exporters were a threat to U.S. jobs and industry and, by extension, to U.S. national security.² Placing China at the center of a protectionist campaign, the United States used the tariffs to punish China for engaging in "unreasonable and discriminatory" business conduct.³ By January 2019, President Trump had levied tariffs on over \$250 billion worth of Chinese goods and threatened to extend them to all Chinese imports. For its part, China retaliated with tariffs on more than \$110 billion of U.S. products.⁴

Although not the target of most U.S. tariffs, sub-Saharan Africa is poised to suffer from their impacts. The International Monetary Fund (IMF) lowered African growth projections from 3.3 percent to 3.1 percent for 2019, citing rising trade tensions, as well as Brexit and slowing Chinese growth. It further warned that the trade war could alone cause up to a 1.5 percent cumulative drop in Africa's GDP growth by 2021.⁵ The predicted impacts of tariffs on African economies have already shaken investor confidence, precipitating drops in commodity prices, local currencies, and major stock exchanges.⁶

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The trade war is predicted to depress global commodity prices and decrease Chinese demand for imports, potentially exacerbating sub-Saharan Africa's economic vulnerabilities. Most African countries rely on the export of a few commodities for revenues and primarily engage with non-African trade partners, such as China and European countries.⁷ A combination of protectionist policies, weak manufacturing sectors, infrastructure gaps, and domestic instability have impeded the diversification of many African economies, as well as the establishment of local and regional supply chains, for decades. These weaknesses are especially prevalent within resource-intensive countries.⁸ As a result, oil-rich Nigeria and copper-exporter Zambia, as well as governments that overwhelmingly trade with China, are especially vulnerable, while countries such as Senegal, which relies on a mix of agricultural products, tourism, and services for revenues, are more immune from the trade war's impacts.



Source: IMF, *Regional Economic Outlook: Domestic Revenue Mobilization and Private Investment* (Washington, DC: 2018), 90, <https://www.imf.org/en/Publications/REO/SSA/Issues/2018/04/30/sreo0518>; African Development Bank Group, *African Economic Outlook 2019* (Abidjan: 2019), 12, https://www.afdb.org/fileadmin/uploads/afdb/Documents/Publications/2019AEO/AEO_2019-EN.pdf.

- **Weakening Commodity Prices:** U.S. tariffs are one of many factors projected to stem global growth rates,⁹ applying pressure to global commodity prices. Commodity exporters recovered slightly from a 2014–16 price plunge, but not enough has been done to diversify and mobilize domestic resources, leaving them exposed to another downturn.¹⁰ Oil and industrial metal prices fell following the implementation of U.S. tariffs on Chinese imports in June, and their stability is tied in part to tariff negotiations.¹¹ African Development Bank experts warn that trade tensions could cause a 2.5 percent reduction in GDP for resource-intensive exporters and a 1.9 percent reduction for oil exporters by 2021.¹²
- **Reducing Chinese Imports:** U.S. tariffs, combined with several domestic and external pressures, are slowing down Chinese production and reducing Beijing's demand for raw materials from sub-Saharan Africa.¹³ Diminished Chinese demand could further reduce annual exports of \$75.26 billion from Africa.¹⁴ South Sudan and Angola, which rely on Beijing's thirst for resources for more than a quarter of their exports, are especially vulnerable.¹⁵

- **Missed Commercial Opportunities:** African businesses are poorly positioned to benefit from commercial opportunities surfacing from the trade war. Manufacturers are diverting operations outside of China to avoid U.S. tariffs. Trade tensions also reinforce China's resolve to reduce dependency on and substitute its U.S. imports. However, Asia and Latin America, which possess more developed manufacturing sectors than sub-Saharan Africa, are poised to clinch most of these deals.¹⁶ Despite sporadic reports of Chinese entities approaching Nigerian or Ethiopian producers,^{17,18} South Africa is likely the only country with the capacity to gain significant business from the trade war.¹⁹

TARIFFS ADD HEAT TO BEIJING'S RHETORIC IN AFRICA

As trade tensions escalated between Beijing and Washington this year, China took to the world stage to amass political support against U.S. tariffs. Sub-Saharan Africa was no exception. Not only is the trade war spurring China to deepen its long-term investments in Africa as it reduces its dependence on the United States, but it is also being used by Beijing to sow anti-U.S. sentiment among African leaders and publics.

- **Feeding China's Narrative:** Beijing is using the trade war to discredit the U.S. brand in sub-Saharan Africa. Chinese ambassadors to Nigeria and South Africa—the region's biggest economies—issued public statements condemning the impact of U.S. tariffs on local economies.²⁰ China's envoy to South Africa noted that the rand's value dropped due to U.S. tariffs but rose when President Xi Jinping visited the country in July.²¹ These comments fit into Beijing's broader political strategy on the continent, which casts itself as Africa's ideal development partner, often at the expense of the United States. The United States has not acknowledged or responded to the negative impacts that its broader economic policies are having on the continent.

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Africa's Top Exporters to China	
Country	Percentage of 2017 Exports Destined for China
South Sudan	95%
Angola	61%
Eritrea	58%
Gambia	52%
Democratic Republic of the Congo	45%
Guinea	44%
Zimbabwe	44%
Gabon	42%
Central African Republic	41%
Republic of the Congo	40%
Sierra Leone	36%
Equatorial Guinea	28%
Chad	24%
Mauritania	23%

Source: "Where does China Export to?" The Observatory of Economic Complexity, accessed 5 April 2019, http://atlas.media.mit.edu/en/visualize/tree_map/hs92/export/chn/show/all/2017

- **Prompting an African Rebuke:** During a meeting with Xi Jinping, President Sall announced that Senegal would “work with China to build a more balanced, just and inclusive global governance system, safeguard multilateralism and oppose protectionism.”²² At the 2018 Forum on China-Africa Cooperation (FOCAC), President Xi stood alongside 53 African countries and promised to counter protectionism—an implied, Sino-African jab at the United States.²³ Independently, the leaders of Nigeria, South Africa, Ghana, and Cabo Verde and the former president of Zambia have also admonished the trade war and warned of its impacts on African markets.^{24,25,26,27,28}

HOW TARIFFS IMPACT U.S.-AFRICA RELATIONS

Although sub-Saharan Africa is largely absent from the current discourse on the trade war, tariffs nevertheless pose risks indirectly by undercutting the United States’ position and some of its priorities on the continent. Trade tensions primarily weaken U.S. goals of supporting development in sub-Saharan Africa through expanded U.S.-Africa trade and investment, restoring its political prestige on the continent, and challenging China’s expanding influence.

- **Slowing the Journey to Self-Reliance:** The U.S. Agency for International Development (USAID)’s Journey to

Self-Reliance, a key pillar of the U.S.-Strategy Toward Africa, seeks to shift away from a foreign aid model and toward a new paradigm that develops African economies through increased trade and investment.²⁹ The trade war could counteract U.S. efforts to boost African self-sufficiency in two ways. First, as explained above, tariffs are indirectly harming sub-Saharan Africa’s economic growth, which slows economic reform efforts and deepens dependency on foreign aid. Diversification and industrialization initiatives require capital, and depressed export orders threaten to decrease revenue generation. Second, U.S. appetite to invest in African markets is likely to decrease if continued tariff tensions slow growth in both sub-Saharan Africa and the United States, simultaneously lowering U.S. demand for goods and adding risk to African markets.³⁰

- **Damaging U.S. Prestige in Africa:** U.S. protectionism, called out by several African leaders as destructive to their economies, risks adding to the perception that the United States is apathetic toward the region. Since President Trump took office, African publics and leaders have noted a marked decrease in U.S. engagement with the continent, expressing dismay over the White House’s disparaging remarks about African leaders and countries, the drop in the number of high-level U.S.

TARIFFS INCREASE TENSIONS WITH SOUTH AFRICA

South Africa is the only sub-Saharan African country the United States directly targeted with tariffs, producing some economic anxiety and adding another irritant to perennially difficult U.S.-South African relations. South African companies are on a list of major exporters required to pay a 10 percent tariff on aluminum and 15 percent tariff on certain steel exports to the United States.⁴² The impacts so far have been minimal, in part because U.S. aluminum purchasers have absorbed extra costs and some categories of South Africa’s steel exports are exempt.⁴³ Nevertheless, the South African stock market and currency buckled when tariffs were initially announced, and investors worry that other major steel and aluminum producers will divert some exports to avoid U.S. tariffs, threatening local South African markets with lower prices.⁴⁴ Trade analysts also say these tariffs disregard the African Growth and Opportunity Act (AGOA), which currently facilitates the flow of 6,700 South African goods to the United States, potentially weakening its credibility as a tool to attract foreign investment in the long term.⁴⁵

As of now, U.S. tariffs have been most harmful to U.S.-South Africa relations. Pretoria officials objected to the tariffs, arguing that they disproportionately impacted its workers and were politically motivated. The South African Department of Trade and Industry argued that the United States extended exemptions to its allies, which together made up 50 percent of steel and aluminum exports to the United States, whereas South African exports amounted to less than 2 percent of U.S. imports of both products.⁴⁶ While South Africa is unlikely to retaliate and risk losing lucrative AGOA benefits, it has ardently reprimanded the United States on the world stage and strengthened its Beijing ties. Russia, China, and South Africa convened at the BRICS Conference with a newfound commitment to confront “unprecedented challenges” to multilateralism and to deepen trade.⁴⁷ If the Trump administration indeed sought to make an example of South Africa by persuading it to adopt a U.S.-friendly foreign policy with the threat of tariffs, then its strategy may have backfired.

diplomatic visits, and the relative silence on U.S. policy objectives toward the continent.³¹ When viewed in context of suboptimal U.S.-African diplomatic relations, African statements that reprimand U.S. protectionism represent another point of contention between U.S. and African governments.

- **Reinforcing Chinese Rhetoric in Africa:** Finally, the economic and political impacts of the trade war are working in Beijing's favor. Taking the words of African leaders at face value, it would appear that the Trump administration's battle to counter Chinese influence globally is backfiring in sub-Saharan Africa; U.S. tariffs inadvertently give ammunition to Beijing's narrative and undermine U.S. efforts to stem Beijing's political reach on the continent. U.S. protectionism may also sharpen the distinction between China and the United States as trade partners. As President Guelleh of Djibouti once told *Jeune Afrique*, the Chinese offer "a long-term partnership" whereas the Americans are only interested in quick, easy wins.³²

Trade tensions primarily weaken U.S. goals of supporting development in sub-Saharan Africa through expanded U.S.-Africa trade and investment, restoring its political prestige on the continent, and challenging China's expanding influence.

OPPORTUNITIES TO OFFSET THE TRADE WAR'S IMPACT

It is not inevitable that the U.S.-China trade war will have harmful consequences for sub-Saharan Africa and U.S. objectives in the region. The extent to which negative economic forecasts will materialize is contingent on Chinese and U.S. policy decisions and the ability for global and domestic markets to counterbalance the trade war's negative effects. There are several short and long-term steps available to Washington to strengthen its U.S.-Africa strategy and resolve the contradictions surfacing between its global and regional approaches.

- **Focus on U.S. Strengths:** Sub-Saharan African governments understand that partnerships with the United States and China come with distinct strengths and weaknesses. The U.S. government should seek to strengthen its own trade and investment strategy and counter anti-U.S. rhetoric propagated by China rather

than respond with a list of Beijing's faults. This means highlighting its economic comparative advantage, from the expertise and capital in the technology and entertainment fields to its world-class professional services.³³ With the recent announcement of Prosper Africa, U.S. policymakers have an opportunity to craft and implement a new approach to greater U.S. private-sector engagement in the region. The more the U.S. government develops Prosper Africa, the more effective the United States will be at countering rumors and negative reactions from African, Chinese, and other global stakeholders.³⁴

- **Treat China Tariffs as Global Tariffs:** The tariffs punish other regions and key partners, an implication that is often ignored. U.S.-China negotiations postponed a substantial hike on \$200 billion worth of Chinese products from 10 percent to 25 percent and signal the possibility of a deal to remove tariffs altogether.³⁵ As President Trump moves forward with tariff talks, his administration should consider their global impacts and how they fit into a broader strategy to counter China globally. Officials in Africa and other nations (both developing and developed) recognize the threat posed by Chinese economic espionage and business coercion but, given the distraction of U.S. protectionism, will have less motivation to unite against Beijing.³⁶
- **Support African Trade Initiatives:** The United States is promoting protectionism at a time when integration is gaining momentum in sub-Saharan Africa.³⁷ The Continental Free Trade Agreement (CFTA), a transcontinental effort to boost regional trade and supply chains by lowering tariff and non-tariff barriers, is key to the region's economic self-reliance and represents a formidable opportunity for the United States. Successful implementation of the CFTA would grant U.S. businesses various points of access to a consumer market of 1.2 billion people.³⁸ The United States should rethink its objective of securing one free trade agreement with a model nation in Africa, which risks undercutting the CFTA.

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- **Protect U.S.-African Trade Deals:** The recent affirmation of AGOA as a key U.S.-Africa investment tool is positive, but Washington can further protect AGOA's value by avoiding tariffs that are perceived as violations of its provisions.³⁹ Moreover, as the Trump administration re-examines its preferential treatment under the Generalized System of Preferences (GSP) program, it is possible that African countries deemed “more developed” such as the Republic of the Congo and Gabon will come under scrutiny.⁴⁰ If so, U.S. officials and their counterparts should enter into alternate agreements with these countries that ensure reciprocal duty-free trade. Free trade agreements remain an integral tool to increase U.S.-African trade and investment, with AGOA and the GSP facilitating \$13.8 billion worth of U.S. imports (of a total of \$24.9 billion) in 2017.⁴¹ ■

***Judd Devermont** is the director of the CSIS Africa Program.*

***Catherine Chiang** is a program coordinator and research assistant with the Africa Program at the Center for Strategic and International Studies in Washington, D.C.*

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