

18 September 2025

TRADE AND DEVELOPMENT CORRIDORS IN AFRICA – NOW OR NEVER

How trade conflicts are reshaping global markets and how can Africa
respond?

API Summit



► Control Risks in Africa

- Over **40 years of experience** across the continent
- **Registered entities and offices** in Nigeria, Kenya, South Africa, Senegal, Mauritania, Chad, Mozambique and Libya.
- Team of **25 full-time Africa analysts** and consultants supported by asset mapping and significant information networks on ground
- **Project experience across all 54 countries** in Africa. Support provided to international and African companies.
- **Over 300 political risk assessments and business intelligence investigations in Africa** during the past 12 months.
- **Analysts in regional offices** in Dakar (Senegal), Lagos (Nigeria), Johannesburg (South Africa), Maputo (Mozambique) and Nairobi (Kenya).
- Over **300 staff and consultants** supporting clients across Africa
- **Operational and embedded security support** provided across Africa with over 150 consultants on long-term consulting tasks with a significant resource pool



Geopolitics

From a unipolar to a multipolar world



CANADA 1796 mi

7846 km
4875 mi MARRUECOS

ALASKA 5628 km
3497 mi

8406 km
5220 mi ALEMANIA

XCARET 0 km
0 mi

33 km
20 mi XEL HÁ

HAWAII 7305 km
4539 mi

7535 km
4682 mi PORTUGAL

GRECIA 10263 km
6377 mi

2277 km
1415 mi COLOMBIA

13557 km
8424 mi KENIA

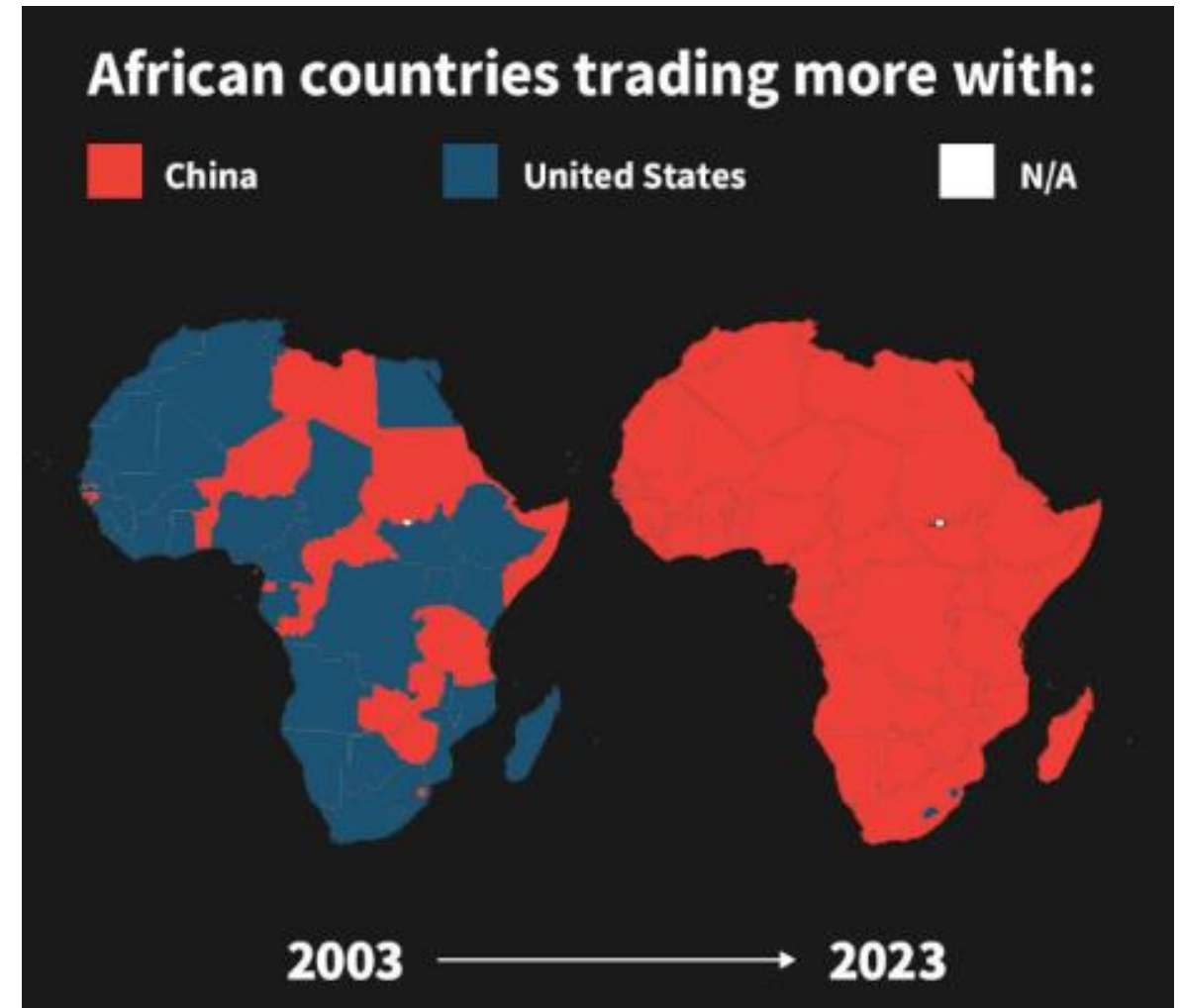
6208 km
3857 mi CHILE

► Decreasing US influence....

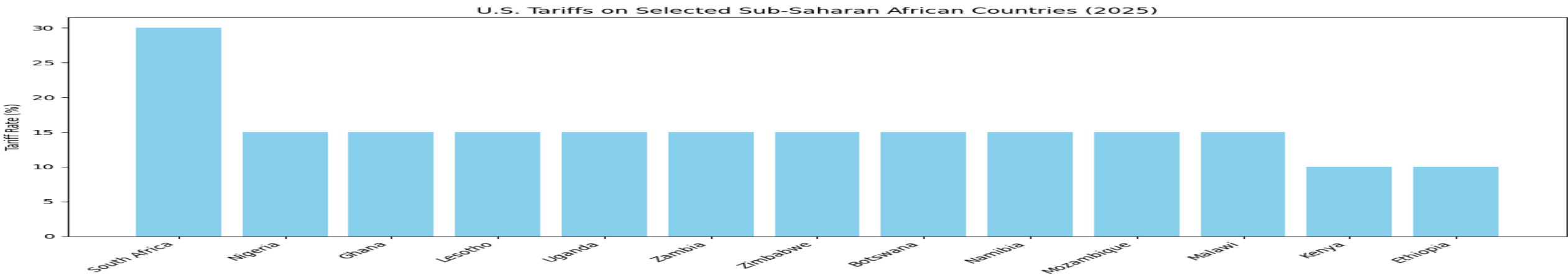
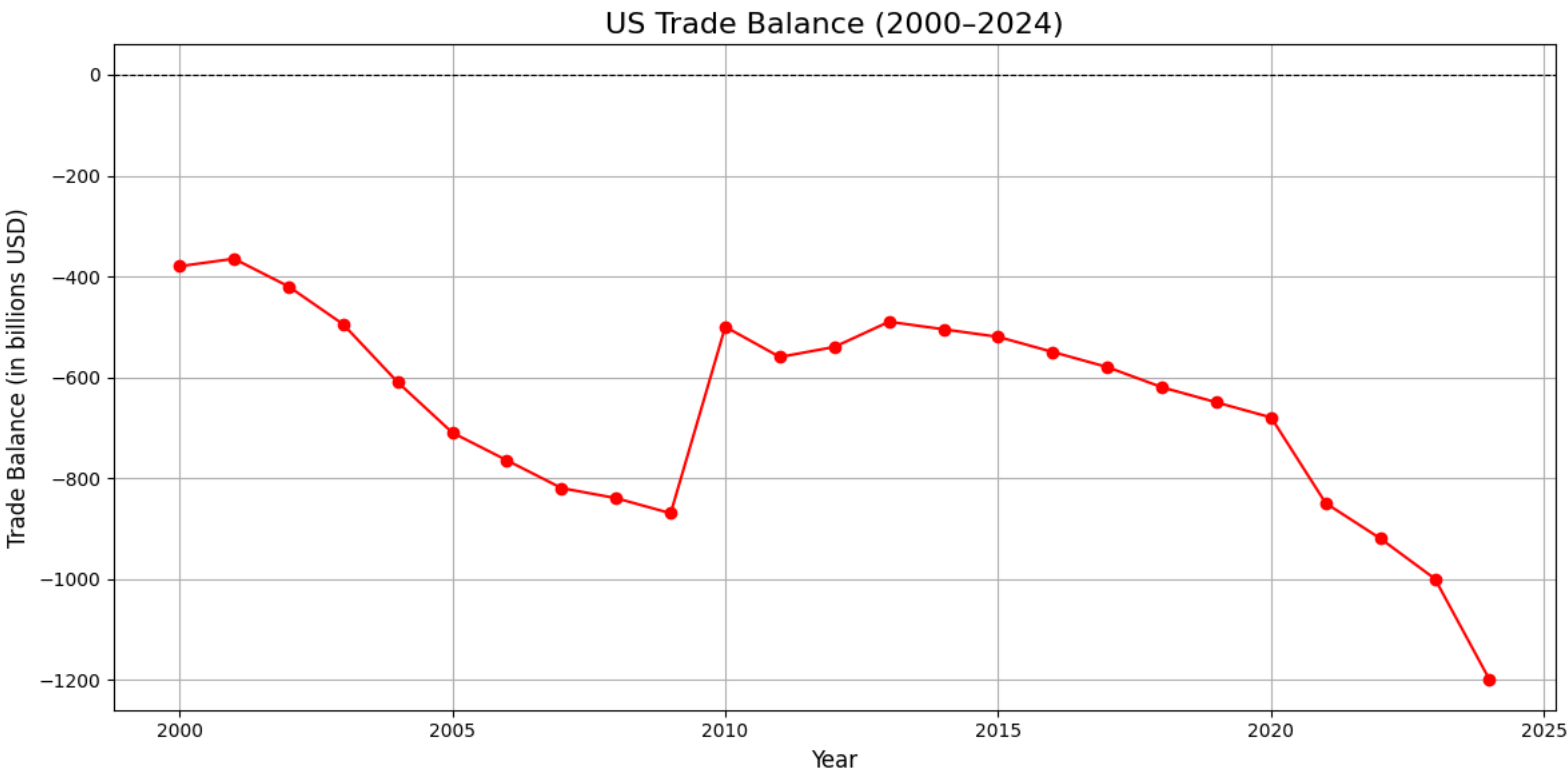
Global shift away from US/West and more towards China but also rising Middle Powers – India, Saudia Arabia, UAE, Russia

Potential for Africa to benefit from shift, with more trade partners which recognize potential in continent

Countries that see Africa as a theatre of politics will miss the opportunities



- ...but US still a significant player
- US policy under Trump has impacted Africa
- USAID – potential long-term positive
- Tariffs – Trump looks to correct US trade balance





External trade

And the potential for African business

► Increased trade partners in Africa

China to bear some brunt of global trading system

EU will remain key destination, and increased trade with UAE and Qatar (gold, oil) and India, Korea, Japan (resources, agriculture)

Lobito Corridor and TAZARA – potential key export routes, though will be of raw materials



► African governments pushing beneficiation

African governments looking to force companies to refine and manufacture rather than export raw materials

Companies need good infrastructure, stable policies, larger markets

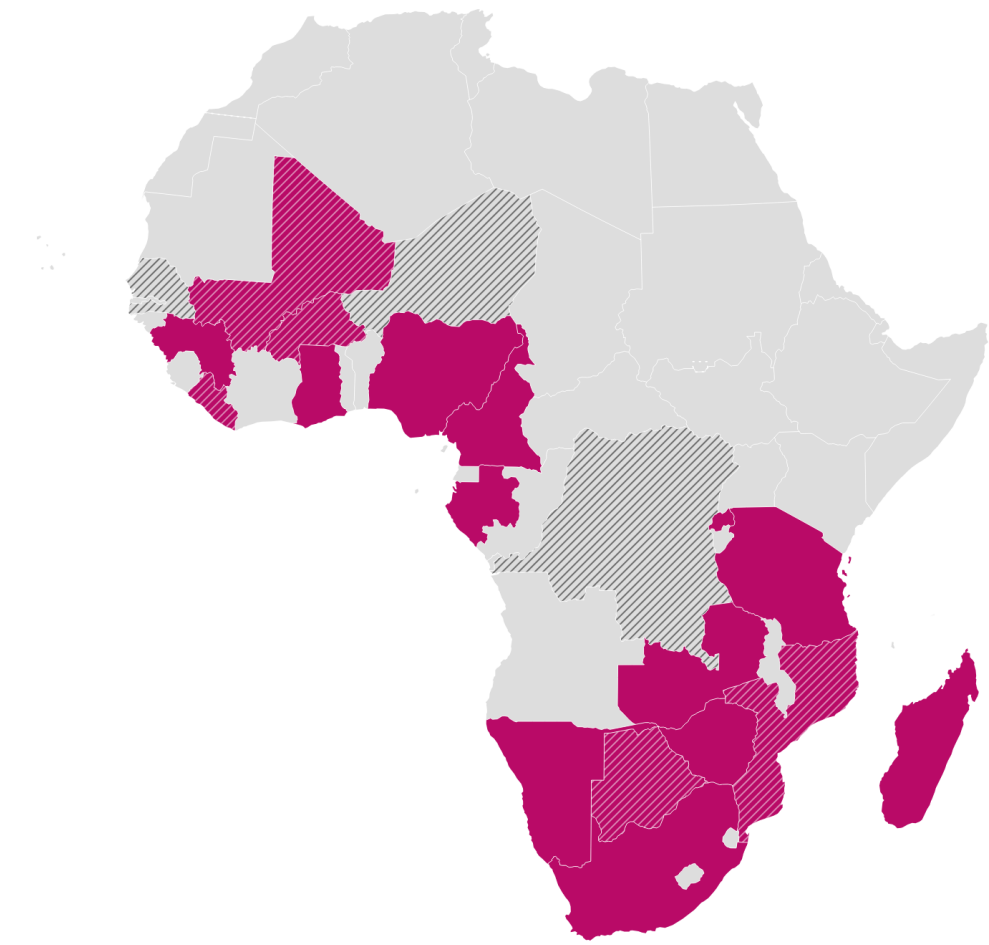
Capital will go where most efficient

Public-private partnerships are needed, but also larger domestic/regional markets

Regulatory changes sweeping accross Africa's mining sector

Countries with effective or planned fiscal or local content regulatory reforms (2022-2025)

Effective or planned reforms Ongoing or planned renegotiation



Boundaries and country names shown on this map do not imply endorsement or acceptance by Control Risks or Seerist
Map: Control Risks

Intra-Africa trade

Now or never?

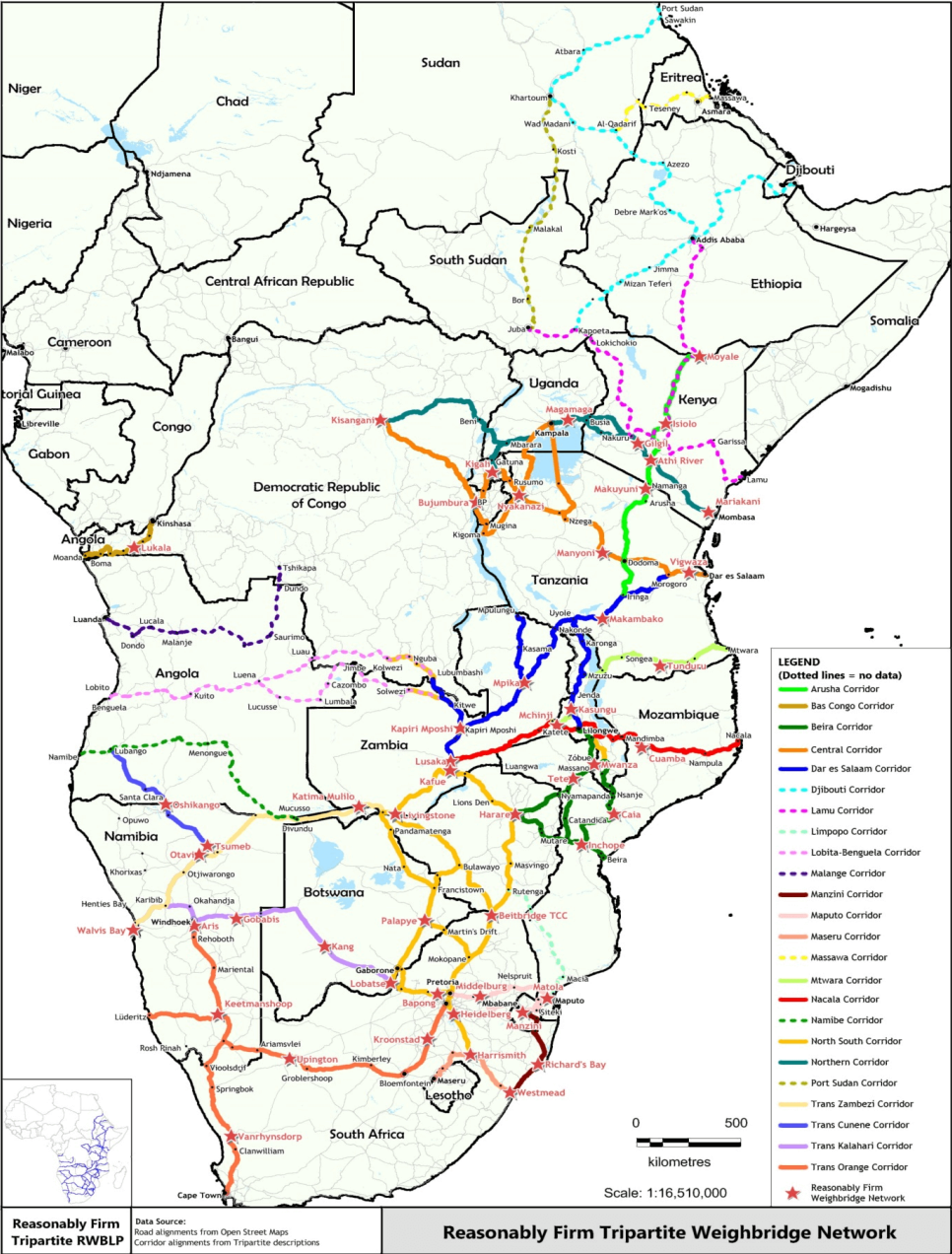


► Intra-African trade key to continental development

AfCFTA as far as integration has progressed after 60 years of rhetoric

Positive steps – PAPSS; expansion of Guided Trade Initiative

Still many barriers, of which infrastructure and political will the largest



► Southern Africa potential

Southern Africa has most advanced trade corridors in continent

Potential for property developers if AfCFTA implemented

Still many obstacles to overcome – policy and infrastructure

