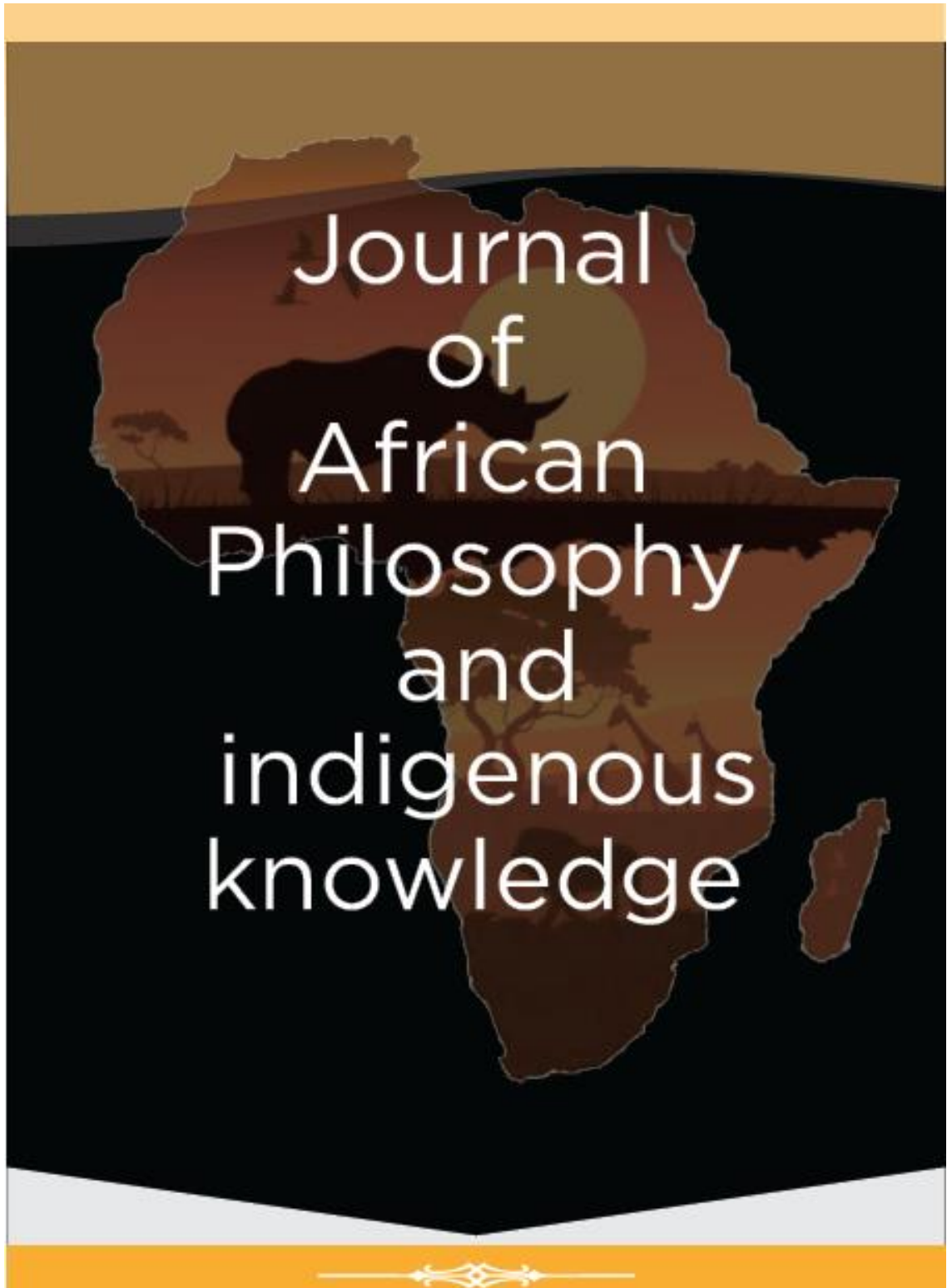




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EDITORIAL NOTE

The articles assembled in this issue collectively advance a compelling argument: that sustainable development in Africa requires a fundamental re-centering of indigenous knowledge systems, cultural practices, and philosophical traditions. While the contexts range from disaster risk reduction in Zimbabwe to digital pedagogy in Yorubaland, from inclusive education in Nigeria to agricultural trade resilience across East and West Africa, a unifying thread runs through each contribution the necessity of culturally grounded, context-specific solutions to African challenges.

Esther Ogunwole and colleagues open this issue with a critical examination of culturally responsive inclusive education in Ado-Ekiti, Nigeria. Their study reveals that while teachers demonstrate some familiarity with inclusive practices, significant gaps remain in pedagogical confidence, classroom management, and cultural sensitivity toward learners with practical needs. The findings underscore a vital insight: inclusivity cannot be achieved through Western-derived models alone; it demands teacher training that is both culturally grounded and responsive to local realities.

Complementing this work, Funmilayo Olu-Ajayi makes a persuasive case for integrating indigenous knowledge into Nigeria's science curriculum. Her argument that traditional practices herbal medicine, local farming techniques, ecological wisdom can enrich scientific education challenges the lingering colonial assumption that indigenous knowledge is antithetical to modern science. Instead, she envisions a blended pedagogy that honours both knowledge systems, fostering environmental awareness and community engagement among learners.

The geopolitical dimensions of indigenous resilience are explored in Charles Apokhume and Olileanya Ezugwu's examination of tariff vulnerability in Kenya, Ethiopia, and Nigeria. Their findings challenge conventional narratives of African agricultural vulnerability by demonstrating that external trade shocks, rather than merely destabilising, can catalyse indigenous-led value chain development. This reframing from sites of perpetual dependency to spaces of creative resilience offers a powerful counter-narrative to dependency theory's more deterministic conclusions.

From Zimbabwe, Owen Mafongoya and colleagues interrogate the cosmological approaches to disaster risk reduction among the Ndau people of Chimanimani. Their documentation of indigenous forecasting indicators, sacred rituals, and cultural practices reveals sophisticated systems of anticipatory action that have sustained communities across generations. Yet these systems face existential threats from climate change, Christianity, and modern science threats that the authors argue must be addressed through genuine integration rather than mere acknowledgement.

This issue presents a groundbreaking study on Másòyínbó (Olálékàn Fábílólá) and the architectures of a decentralised Yoruba knowledge economy. The study reveals how digital technologies, often viewed as instruments of cultural homogenisation, can be

strategically indigenised to foster linguistic consciousness, economic sovereignty, and epistemic repair. Másòyínbò's model transforming Western technological platforms into spaces of Yoruba cultural affirmation offers a replicable framework for African scholars seeking to bridge tradition and innovation in the digital age.

Extending this conversation on epistemic repair, Agbegbedian Anthony Oghenevwoke offers a critical evaluation of the concept of man in Urhobo traditional philosophy. His study directly refutes lingering colonial notions of the "irrational" preliterate African society, demonstrating that the Urhobo, like other African peoples, possess a coherent logical system through which man is understood as both a historical and metaphysical being. This philosophical grounding, the study shows, is not abstract speculation but the very foundation upon which Urhobo norms, values, and survival as a people rest.

Complementing this philosophical inquiry, David O. Ovuede and Agbegbedian Oghenevwoke Anthony examine the impact of modernity on marital dispute resolution within Benin Kingdom, Nigeria. Their research unmask how the imposition of Native court systems and British morality displaced the traditional *Ọkaegbẹe* (patriarch) institution, fundamentally altering the power dynamics of conjugal conflict management. By revealing the nexus between modernity and the diminution of indigenous governance structures, the authors demonstrate that contemporary marital discord cannot be fully understood nor effectively addressed without reckoning with the colonial erosion of culturally anchored resolution frameworks.

Together, these articles issue an urgent call: the decolonisation of African knowledge systems is not merely an intellectual exercise but a practical imperative for sustainable development. Whether in education, agriculture, disaster management, or digital economies, the contributors to this issue demonstrate that Africa's future lies not in abandoning indigenous traditions but in creatively reimagining them for contemporary challenges.

We invite our readers to engage deeply with these contributions and to join the ongoing conversation about how African philosophy and indigenous knowledge systems can shape more just, resilient, and culturally affirmed futures across the continent.

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**TARIFF VULNERABILITY AND INDIGENOUS-LED AGRICULTURAL
RESILIENCE IN AFRICA: RETHINKING TRADE SHOCKS AND LOCAL VALUE
CHAINS IN KENYA, ETHIOPIA, AND NIGERIA**

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Abstract

Western tariff regimes and non-tariff trade regimes, particularly those imposed by the United States and the European Union, often appear as invisible borders, shaping the fate of African agriculture as decisively as geography itself. For exporters of coffee, tea, and cassava, shifts in tariffs imposed by dominant economies have long meant vulnerability, fluctuating markets, and constrained growth. Yet, between 2015 and 2024, with emerging policy shifts observed in 2025, the experiences of Kenya, Ethiopia, and Nigeria reveal a more complex reality: external trade shocks can also provoke resilience and stimulate indigenous-led value creation. This study analyzes how tariff vulnerability intersects with cultural resilience to transform African agricultural value chains. Guided by Dependency Theory, the paper situates Africa's structural exposure within global trade asymmetries, with a particular focus on U.S.-Africa trade relations, while exploring how local agency negotiates and sometimes subverts these constraints. A mixed-method approach was employed, relying on secondary data from trade reports, government policy documents, and articles. Data were thematically organized to trace associations between trade shocks and observed adaptive strategies, and to assess emerging patterns of value chain development. Findings indicate that Kenya diversified its tea exports into Asian and African markets, Ethiopia advanced coffee traceability and sesame processing for Gulf and Asian buyers, and Nigeria strengthened cassava processing through cooperative models and policy reforms. The study concludes that tariff shocks, though destabilizing, can catalyze indigenous innovation, promoting intra-African trade and embedding sustainability within agricultural economies. Rather than sites of perpetual vulnerability, African agriculture can emerge as a foundation for resilient and self-determined growth.

Keywords: Agriculture, dependency theory, macroeconomic analysis, regional trade, tariff,

Introduction

Agriculture remains the backbone of many African economies, providing livelihoods for millions, contributing significantly to Gross Domestic Product (GDP), and sustaining both local food systems and international trade flows (UNCTAD, 2024). Yet, the global trade environment exposes these systems to frequent disruptions, often beyond the control of local producers. Trade shocks, which are sudden changes in tariffs, regulatory standards, or market access, can ripple through entire agricultural value chains, affecting the prices farmers receive, the cost of inputs, and ultimately, household incomes (OECD, 2025). For example, when major markets like the European Union or the United States adjust tariffs or tighten sanitary and phytosanitary (SPS) requirements, exporters of tea, horticultural produce, or other staples experience immediate revenue losses, which in turn reduce government export earnings and foreign exchange availability (IFPRI, 2025). These shocks are not just numbers on a balance sheet; they affect the availability and cost of everyday goods and national economic stability. Non-tariff measures (NTMs), including SPS measures, quality standards, and licensing requirements, have grown in prominence, often surpassing tariffs as the primary determinants of trade access for African agricultural products (UNCTAD, 2025). While these measures are designed to protect consumers, animals, and plants from disease and contamination, their implementation can be costly and complex for small-scale producers, who may lack the infrastructure, technical know-how, or financing to

comply (OECD SWAC, 2025). The result is that countries with limited export diversification become particularly vulnerable, as their economic fortunes hinge on a few commodities and a small set of trading partners.

In this context, the concept of indigenous-led agricultural resilience emerges as a critical mechanism to cushion against external shocks. Local knowledge systems, agency, adaptation, diversification, and innovation within value chains allow countries to better withstand tariff volatility and non-tariff barriers while maintaining their position in global markets

This paper examines the duality of how tariff and trade-preference shocks both expose vulnerability and simultaneously stimulate indigenous, locally driven resilience in African agriculture. It also analyzes how these tariff shocks most significantly affected the case study agricultural value chains in Kenya, Ethiopia, and Nigeria between 2015 and 2024, including emerging policy shifts in 2025. Finally, it identifies the indigenous, community-level, or domestic institutional responses that emerged in reaction to these shocks, and assesses the extent to which these responses strengthened long-term economic resilience, diversification, or processing capacity.

The study focuses on three strategically important agricultural economies, which are Kenya's tea, Ethiopia's coffee, and Nigeria's cassava, each representing different export structures and institutional responses. Across these countries, we observe a common pattern in which external shocks often expose systemic weaknesses but also

catalyse value-chain strengthening, such as product diversification, traceability upgrades, cooperative mobilization, and the development of domestic processing capabilities. Understanding these dynamics is central to ongoing debates about Africa's structural transformation, especially under the African Continental Free Trade Area (AfCFTA) and renewed global competition for agricultural commodities.

Following the introduction, research questions, and objectives, this paper proceeds by outlining the theoretical framework that guides the analysis. It then reviews the relevant academic and policy literature on global trade architecture, preferential trade schemes, comparative advantage, export and value-chain integration of the case study countries, before examining vulnerabilities to trade shocks and evidential pathways of resilience. Building on this foundation, the study presents its methodology, followed by the findings and analysis derived from the literature. These findings are subsequently discussed through the selected country case studies, leading to the paper's conclusion and references.

Dependency Theory in Africa's trade relations in the 21st Century

This study is grounded in Dependency Theory, a paradigm that interrogates the asymmetrical structure of the global political economy and its implications for peripheral states. Originating in the post-war structuralist tradition of Raul Prebisch (1950) and later refined by scholars such as Andre Gunder Frank (1967) and Immanuel Wallerstein (1974), Dependency Theory posits that underdevelopment in the global South

is not a historical accident but a product of the very processes of integration into the world economy. Within this configuration, peripheral economies supply primary commodities to industrialized "core" economies, whose control of technology, capital, and market access reproduces dependency and limits structural transformation.

Applied to Africa's trade relations, the theory offers a critical lens for examining how external tariff regimes and preferential access mechanisms, such as the United States' African Growth and Opportunity Act (AGOA) and the European Union's Everything-But-Arms (EBA) scheme, embed African economies within hierarchies of dependence. These arrangements, while ostensibly developmental, often preserve unequal exchange by privileging unprocessed commodity exports over value-added production. As a result, African producers remain exposed to external price volatility and policy shifts determined beyond their borders, reinforcing the continent's structural subordination in global trade networks.

Yet, contemporary scholarship has also expanded Dependency Theory to incorporate agency and adaptive resilience within the concept of dependency (Amin, 2014; Mkandawire, 2015). This rearticulation acknowledges that peripheral actors are not merely passive recipients of global shocks, but can, under certain conditions, leverage those very asymmetries to reconfigure production and trade relations. Within this revised frame, tariff shocks and trade disruptions are not only symptoms of structural inequality but can also serve as catalytic pressures for innovation, diversification, and indigenous-led

value creation.

For Kenya, Ethiopia, and Nigeria, Dependency Theory thus provides both a critical and interpretive framework: critically, it exposes the systemic constraints shaping agricultural exports under global capitalism; interpretively, it elucidates how local actors, through cooperative processing, cultural knowledge systems, and market diversification, negotiate and sometimes subvert dependency. In doing so, the framework underscores a central proposition of this study: that structural vulnerability and local agency coexist dialectically, and that resilience, rather than being exogenous to dependency, can emerge from within its contradictions.

The Global Trade Architecture and African Market Access: AGOA and EU Preferential Schemes

The global trade architecture governing African market access has historically been shaped by a set of non-reciprocal preferential trade arrangements designed to integrate Sub-Saharan African (SSA) economies into the global system. Chief among these are the United States' African Growth and Opportunity Act (AGOA), enacted in 2000, and the European Union's Everything But Arms (EBA) initiative, Economic Partnership Agreements (EPAs), and the EU's Generalised Scheme of Preferences (GSP). These frameworks, grounded in the principle of special and differential treatment, sought to enhance Africa's export competitiveness by offering duty- and quota-free access for thousands of products. As the United Nations Conference on Trade and Development (UNCTAD 2023) notes, such arrangements reflect a broader

commitment to preserve "policy space" for developing economies, allowing them to restructure production and trade profiles to meet contemporary global challenges

However, the literature notes that such preferences can carry embedded conditions. For instance, scholars emphasize that preference utilization often requires firms to meet foreign standards (SPS, quality) and to invest in upgrading if export growth is to materialize. World Bank and EU analyses find that duty-free access can boost exports only when African producers comply with stringent buyer requirements and improve logistics or production quality (European Commission, 2024; United States Trade Representative (USTR), 2024). In sum, African trade governance via AGOA/EBA/GSP offers important opportunities, but it simultaneously channels trade in ways that may favor primary exports unless complementing investments are made.

Export Growth, Comparative Advantage, and Value Chain Integration under Preferences

Preferential market access and trade-preference regimes have played a central role in shaping export opportunities and value-chain strategies for African agricultural commodities since the early 2000s. Two instruments are particularly salient for the cases examined here. The United States' African Growth and Opportunity Act (AGOA) provides eligible sub-Saharan African countries with preferential (duty-free) access to a broad range of U.S. market categories and has been a cornerstone of U.S.-Africa trade policy since 2000 (Office of the United States Trade Representative [USTR], 2024).

The European Union's Everything-But-Arms (EBA) initiative grants duty-free, quota-free access to imports from Least Developed Countries (LDCs), while the EU's Generalised Scheme of Preferences (GSP) variants further structure access for non-LDC developing partners (European Commission, 2024). Analyses of these regimes suggest that when preference utilization is combined with firm-level compliance with standards and investment in upgrading, preferences can facilitate export growth and entry into higher-value segments (European Commission, 2024; USTR, 2024).

In Kenya, horticulture (including flowers, fruits, and vegetables), as well as related high-value agricultural exports, illustrates the interaction of comparative advantage, standards compliance, and preferential market access. The European Union has historically been Kenya's principal market for fresh horticulture, and World Bank analyses identify horticulture as a major foreign-exchange earner that benefited from investments in cold-chain logistics, standards certification, and public-private upgrading initiatives (World Bank, 2021). Empirical and policy literature emphasises that Kenya's climatic endowments, coupled with investments in logistics and compliance with EU sanitary and phytosanitary (SPS) standards, sustain its comparative advantage in fresh produce, enabling value-chain integration despite external market volatility (World Bank, 2021; European Commission, 2024).

Ethiopia's trajectory is centred on coffee, where a long-standing comparative advantage has been increasingly complemented by

deliberate moves toward traceability, quality differentiation, and market diversification. Sector evaluation reports indicate that coffee remains a major source of export revenue for Ethiopia, and recent programming has prioritized traceability and processing to access specialty and higher-value market segments beyond traditional European buyers (Agenzia Italiana per la Cooperazione allo Sviluppo [AICS] evaluation, 2024). While preference schemes can facilitate access, evolving regulatory requirements in destination markets (including due diligence and sustainability standards) have pushed Ethiopian actors toward upgrading and traceability to preserve and expand market entry (AICS, 2024).

Nigeria presents a different pathway: abundant raw material endowments (notably cassava and shea) have not historically translated into high levels of domestic value capture. Recent policy signals and programmes indicate a deliberate pivot toward value-added processing and local industrialization. Official NEPC materials outline the One-State-One-Product (OSOP) initiative and other measures aimed at enhancing domestic processing capacity and export competitiveness (Nigerian Export Promotion Council [NEPC], 2023). Very recent government measures, including announced restrictions and policy measures aimed at discouraging raw shea nut exports, are explicitly framed as 'pro-value addition' policies designed to retain more value domestically by fostering processing capacity (Associated Press, 2025).

These policy moves align with the literature, which shows that preference or tariff shifts often trigger import-substitution and upstream upgrading

policies; however, their success depends on parallel investment in processing infrastructure, standards compliance, and logistics (NEPC, 2023; Associated Press, 2025).

Cross-case syntheses in the literature point to two recurring mechanisms by which preferences and trade shocks interact with comparative advantage to shape value-chain outcomes. First, preference-enabled market access stabilizes export margins and can incentivize compliance and investment in upgrading when firms and governments can meet SPS and private-standards requirements (European Commission, 2025; World Bank, 2021). Second, tariff shocks or changes in preference regimes often prompt policy responses, ranging from market diversification strategies to import substitution and pro-value-added measures, but these require supportive public investments and institutional capacity to deliver durable value chain integration (NEPC, 2023; USTR, 2024). In short, preferences remain enabling conditions for export growth, but sustained domestic capture of export value depends on standards compliance, processing capacity, and strategic market diversification, conditions that the cases of Kenya, Ethiopia, and Nigeria are addressing in various ways, in line with their comparative advantages.

Structural Vulnerability and the Trade Shock

Although preference schemes expand market access, they also embed structural vulnerabilities. Early studies by the World Bank (Brenton & Ikezuki, 2004; U.S. International Trade Commission (USITC), 2023) show that AGOA's unilateral, time-bound design

discourages long-term investment, since beneficiary status can be revoked or changed periodically. Likewise, UNCTAD (2022) documents that U.S. and EU tariff schedules often penalize processing: raw commodities enter duty-free, while processed products face higher duties, reinforcing Africa's role as a supplier of low-value goods.

Recent policy shifts have intensified this uncertainty. For example, during 2018-2020, the U.S. trade agenda shifted toward "reciprocal trade," reframing AGOA toward mutual market access. U.S. reports (United States International Trade Commission (USITC), 2020; Brookings, 2021) note that this rhetoric alone dampened investor confidence in AGOA-linked sectors, for instance, delaying expansion by textile manufacturers in Ethiopia and tea packers in Kenya due to the unpredictability.

Concrete cases illustrate these fragilities. Ethiopia's suspension from AGOA in 2022 (USTR, 2022) was followed by a sharp decline in AGOA-eligible exports, particularly in apparel and other value-added sectors, with significant employment losses reported in export-oriented industries. Moreover, Ethiopia's coffee trade exemplifies tariff and regulatory asymmetry: while green (unprocessed) coffee enters major destination markets duty-free, processed coffee products face higher applied tariffs and non-tariff compliance costs, reinforcing incentives toward raw exports (UNCTAD, 2022). These structures disincentivize local value addition despite efforts like the Ethiopian Commodity Exchange reforms (Mbakop et al., 2023; TechnoServe, 2019) to improve traceability and market access.

Kenya faces similar challenges in quality and standards rather than tariffs. While Kenya holds duty-free access to major markets, increasingly stringent sanitary and phytosanitary (SPS) requirements have raised export costs. The United Nations Economic Commission for Africa (UNECA, 2020) estimated that non-tariff barriers can add up to 14% in compliance costs. For example, during the Brexit transition period, Kenya experienced a temporary decline in flower and tea export earnings, partly attributed to new certification and documentation requirements alongside broader logistical and market disruptions. This underscores that preferential market access alone does not eliminate vulnerability - it simply shifts the burden to meeting higher buyer standards.

Nigeria's staple crops also remain exposed. Nigerian cassava and shea exports enter the U.S. and EU markets mostly as raw materials. Existing policies (e.g. the Agricultural Transformation Agenda and Central Bank backing for farm inputs) have supported some processing, but tariff escalation still penalizes value-added products (UNCTAD, 2022). Non-tariff barriers and infrastructure gaps (UNECA, 2020; Food Agricultural Organisation (FAO), 2021) further constrain competitiveness. As these studies conclude, while preferences offer short-term access, they perpetuate commodity dependence absent domestic industrialization or regional integration. Recent U.S. policy debates and proposals around reciprocal trade and preference reform have increased uncertainty regarding the future margins of AGOA preferences. While AGOA formally remains in force,

analysts note that growing emphasis on reciprocity and domestic protection has weakened investor confidence in AGOA-linked sectors. Carnegie Endowment and CSIS reports note that this sweeping change rekindles uncertainty for African exporters of tea, coffee, and cassava. Taken together, the literature and these developments paint a picture of high structural exposure: each of Ethiopia, Kenya, and Nigeria faces a unique mix of policy volatility, SPS constraints, and tariff escalation that drives their agricultural vulnerability (UNCTAD, 2022; UNECA, 2020).

Building Resilience and Pilot Strategies

Despite the challenges, African producers are pursuing indigenous resilience pathways to mitigate tariff vulnerability. The literature identifies several key strategies that evidence this. Lowering intra-African tariffs and harmonizing rules of origin under AfCFTA aim to de-risk external dependencies (UNECA/Africa Agriculture Trade Monitor (AATM), 2021). Analyses suggest AfCFTA could significantly increase intraregional agri-food trade and facilitate regional sourcing of inputs. Early evidence shows Kenya diversifying its exports to neighboring and North African markets: tea and horticulture exports to EAC and North Africa have risen (Tralac, 2024). In West Africa, ECOWAS development plans prioritize cross-border cassava value chains. ECOWAS investment planning documents identify cassava processing hubs, aggregation centers, and regional trade corridors as strategic priorities for industrialization and intra-regional trade integration (ECOWAS,

2022)

Many countries invest in meeting stringent SPS standards through technology. For example, Kenyan exporters have built cold-chain and post-harvest facilities to maintain produce quality (industry studies on cold-chain management). Ethiopia's national coffee strategy has emphasized traceability and quality verification; initiatives like ECX reforms aim to fetch premiums for verifiable lots (TechnoServe, 2019; Mbakop et al., 2023). Donor-supported projects (e.g. European Investment Fund(EIF)/Standards and Trade Development Facility(STDF) programs) document that improving national testing, certification, and storage infrastructure reduces non-tariff frictions and opens alternative markets. Smallholder aggregation and local institutions play a central role in resilience. Ethiopian coffee cooperatives and Kenya's Tea Development Agencies (KTDA) aggregate farmers' output, invest in on-farm processing, and target specialty markets, allowing farmers to capture higher margins and meet buyer specifications (Mbakop et al., 2023; Kenya Tea Board reports). In Nigeria, women's shea cooperatives, often supported by donors, are professionalizing processing, while cassava farmer groups supply medium-scale mills, improving traceability and contract enforcement (FAO; World Bank policy notes).

Governments and NGOs are financing agro-industrial parks, processing plants, and laboratories. For instance, TechnoServe and government strategy documents note new agro-industrial parks in Ethiopia and private investment in Nigerian cassava/starch

lines. A World Bank Public-Private Partnerships handbook highlights how blended finance and contractual PPPs can lower the risk of processing investments. In this way, public policy and private finance combine to scale up value addition even when tariff incentives alone are insufficient.

Shoring up local seed systems, fertilizer production, and agro-services reduces exposure to import costs and currency/tariff shocks. National development plans in all three countries emphasize supporting local inputs (e.g. Kenya's agricultural export strategies, Ethiopia's Coffee Strategy, Nigeria's Anchor Borrowers Programme, and CBN initiatives). These programs (along with mechanization subsidies) aim to raise on-farm productivity and stabilize supply for emerging processors. These interventions build on earlier federal policy frameworks, particularly Nigeria's Agricultural Promotion Policy, which emphasized value-chain development, import substitution, and private-sector participation in agro-processing (FMARD, 2020)

Collectively, these pathways illustrate an emerging indigenous-led trajectory away from vulnerability and toward resilient, value-adding agricultural systems in Africa. They reflect the argument made earlier: tariff shocks, while destabilizing, can catalyze innovation when local actors harness them through cooperation, technology, and regional strategies, suggesting that Africa's agricultural sector is slowly reconfiguring itself from within rather than remaining a passive victim of external trade asymmetries.

Methodology

This study employs a mixed-method approach, drawing both qualitative and quantitative data from secondary sources. A comparative case study design was also used to examine how tariff vulnerability and external trade shocks have impacted agricultural resilience and value-chain transformation in Kenya, Ethiopia, and Nigeria between 2015 and 2024, inclusive of policy shifts observed in 2025. These countries were purposely selected because each represents a distinct subregional context and commodity specialization: tea in Kenya, coffee in Ethiopia, and cassava in Nigeria. Collectively, they capture the diversity of Africa’s agricultural export base and the varying responses to U.S. and European Union (EU) tariff regimes.

The research relies primarily on secondary data drawn from verified institutional and government sources, including the United Nations commodity database (COMTRADE), the International Trade Centre’s (ITC) Trade Map, the World Bank’s World Integrated Trade Solution (WITS), FAO agricultural trade statistics, and national export agencies such as the Kenyan Export Promotion Council (EPC), Ethiopia’s Coffee and Tea Authority, and Nigeria’s Export Promotion Council (NEPC). In addition, relevant policy documents, including the U.S. African Growth and Opportunity Act (AGOA) annual reports, the European Union’s Everything-But-Arms (EBA) and Generalised Scheme of Preferences (GSP) reports, and country-level trade policy reviews, were analysed to trace institutional and regulatory shifts affecting export performance.

Data were collected systematically through document review and content analysis. Trade data were extracted to identify patterns of growth, stagnation, or decline. Qualitative and quantitative content from trade reports, policy papers, and academic literature was manually coded and thematically analysed to identify recurring themes, including tariff vulnerability, value-chain upgrading, and indigenous-led adaptation.

The study employed comparative analysis to evaluate how each country’s policy responses and institutional frameworks have mediated the effects of trade shocks. Through triangulation of quantitative trade trends and qualitative policy narratives, the research sought to reveal not only measurable outcomes in export growth but also the sociocultural and policy mechanisms underpinning indigenous resilience. The methodology thus integrates data triangulation, descriptive trend analysis, and thematic interpretation to provide a nuanced understanding of how external trade pressures have shaped Africa’s agricultural transformation pathways.

Findings and Analysis

Table 1: Kenya - tea¹²

To assess whether Kenya’s tea sector exhibits vulnerability followed by adaptive resilience, Table 1 presents export volumes, export values, and destination markets between 2015 and 2024. This period captures pre-shock stability, mid-period volatility linked to evolving EU and U.S. trade conditions, and post-shock recovery associated with market diversification and institutional upgrading.

Years	Export Volume (Million Kgs)	Export Value (USD Billion)	Major Destination Countries				
2015	443.54	1.28	Pakistan	Egypt	Uk	UAE	Sudan
2016	480.33	1.12	Pakistan	Egypt	Uk	UAE	Sudan
2017	415.49	1.25	Pakistan	Egypt	Uk	UAE	Sudan
2018	474.86	1.39	Pakistan	Egypt	Uk	UAE	Sudan

¹ Tea Board of Kenya (2022). Kenya Tea Industry Performance Highlights for 2022.

² Tea Board of Kenya (2024). Kenya Tea Industry Performance Highlights for 2024.

2019	496.07	1.15	Pakistan	Egypt	Uk	UAE	Sudan
2020	518.67	1.23	Pakistan	Egypt	Uk	UAE	Sudan
2021	536.39	1.25	Pakistan	Egypt	Uk	UAE	Sudan
2022	450.33	1.17	Pakistan	Egypt	Uk	UAE	Yemen
2023	522.92	1.44	Pakistan	Egypt	Uk	UAE	Yemen
2024	594.5	1.40	Pakistan	Egypt	Uk	UAE	Russia

Table 2: Ethiopia - Coffee

Table 2 traces Ethiopia's coffee export performance from 2014/15 to 2023/24, covering the period before and after the 2022 suspension of AGOA preferences. The table enables an assessment of whether export volumes, values, and destination patterns reflect vulnerability to tariff escalation alongside adaptive upgrading through traceability, processing, and market reorientation.

Year	Export Volume ('000 Kgs)	Export Value (USD Million)	Major Destination Countries				
2014/15 ³	206.70	811.71	Germany	Saudi Arabia	USA	Japan	Belgium
2015/16 ⁴	204.03	749.00	Germany	Saudi Arabia	Japan	USA	Belgium
2016/17 ⁵	231.17	897.16	Germany	Saudi Arabia	Japan	USA	Belgium
2017/18 ⁶	233.57	916.97	Germany	Saudi Arabia	USA	Japan	Belgium
2018/19 ⁷	250.45	789.34	Saudi Arabia	Germany	Japan	USA	Belgium

³ USDA Foreign Agricultural Service (2016). Ethiopia Coffee Annual Report 2014/15

⁴ USDA Foreign Agricultural Service (2016). Ethiopia Coffee Annual Report 2015/16

⁵ USDA Foreign Agricultural Service (2019). Ethiopia Coffee Annual Report 2017/18

⁶ Ibid

⁷ USDA Foreign Agricultural Service (2019). Ethiopia Coffee Annual Report 2018/19

2019/20 ⁸	248.12	821.14	Saudi Arabia	Germany	Japan	USA	Belgium
2020/21	280.60	1,138.25	Germany	Saudi Arabia	USA	Belgium	Japan
2021/22	289.87	1,516.87	Germany	Saudi Arabia	Japan	USA	Belgium
2022/23 ⁹	235.08	1,257.00	Saudi Arabia	Germany	USA	South Korea	Japan
2023/24 ¹⁰	338.04	1,708.00	Saudi Arabia	Germany	Belgium	USA	South Korea
2024/25	No data yet						

Table 3: Nigeria - Cassava^{11 12}

Table 3 presents Nigeria’s cassava export trends between 2015 and 2023. The data allow for an examination of whether long-standing tariff escalation against processed products coincided with volatility in export performance and whether recent policy-driven processing initiatives correspond with signs of stabilization and recovery

Year	Export Volume (‘000 Kgs)	Export Value (USD ‘000)	Major destination countries				
2015	576.43	774	USA	Spain	UK	Niger	South Africa
2016	595.66	1,370	Niger	Spain	UK	USA	France
2017	550.69	1,810	Niger	UK	Austria	Spain	Germany
2018	558.68	1,920	Spain	UK	Niger	Austria	USA
2019	594.12	864	UK	Spain	Niger	France	Netherland

⁸ USDA Foreign Agricultural Service (2019). Ethiopia Coffee Annual Report 2019/20

⁹ USDA Foreign Agricultural Service (2019). Ethiopia Coffee Annual Report 2022/23

¹⁰ Ibid

¹¹ The Observatory of Economic Complexity (OEC) (2025). Cassava in Nigeria.

¹² Hushfarm (2025). Nigeria Fresh Cassava Production by Year.

2020	600.02	987	UK	China	USA	Canada	Niger
2021	630.00	1,120	UK	Ghana	Spain	Canada	USA
2022	608.36	797	UK	Canada	USA	Spain	Netherlands
2023	627.00	1,150	UK	Spain	Canada	China	Niger
2024	643.60	1,820	UK	Niger	Canada	Spain	USA

Discussion of the Case Studies in Resilience

This section details the causal chain from tariff shock to indigenous response in each of our three case countries.

Kenya

Kenya’s high-value exports faced a double shock in the mid-2020s. In

2025, a new U.S. Reciprocal Tariff policy cast doubt on duty-free access for Kenyan tea and horticulture. At the same time, post-Brexit regulations imposed stricter EU sanitary and phytosanitary (SPS) rules and additional certification costs on flowers and tea. These changes squeezed profit margins; for example, Kenya’s horticulture export earnings fell by

about 11% in early 2025, highlighting the country’s vulnerability to distant trade policies. Kenyan institutions and producers quickly pivoted to new markets and higher standards. The government and industry dispatched export promotion missions, and the Kenya Export Promotion and Branding Agency negotiated new market access (notably the 2024 UAE-Kenya CEPA for Gulf

markets). At the same time, the Tea Board of Kenya (with KTDA cooperatives) invested in quality upgrading and traceability systems, and exporters bolstered cold-chain logistics and post-harvest handling to meet Gulf and Asian buyer requirements. These measures aimed to diversify markets and raise product quality in response to the EU and U.S. shocks.



Major destination countries: *Pakistan, Egypt, Uk, UAE, Sudan, Yemen, Russia*

Figure 1: Kenya Tee: export volume and export value trend (2015-2024)
Source: Author’s formation (2026)

As shown in Table 1 and Figure 1, Kenya’s tea exports display a pattern of volatility followed by recovery. Export volumes declined sharply in 2017 and again in 2022, coinciding with periods of heightened regulatory uncertainty and post-Brexit adjustment, yet rebounded strongly to 594.5 million kilograms by 2024. Export values follow a similar trajectory, rising from USD 1.17 billion in 2022 to USD 1.40 billion in 2024, indicating not only

volume recovery but improved unit values. Simultaneously, destination markets remained diversified beyond traditional EU buyers, with Pakistan, Egypt, the UAE, and Russia featuring prominently. This empirical pattern aligns with reports from the Tea Board of Kenya and trade policy analyses that document Kenya’s strategic pivot toward non-traditional markets and quality upgrading in response to external trade shocks.

Ethiopia
Ethiopia’s coffee sector was jolted in January 2022 when the U.S. suspended

its AGOA preferences. This removed duty-free access for Ethiopian processed (roasted/packaged) coffee, a tariff asymmetry since green beans remained untaxed. The AGOA cutback (on top of earlier U.S. trade uncertainty) directly raised export costs for coffee processors and underscored Ethiopia’s exposure to unilateral preference shifts.

Local actors moved to capture more value domestically. Under the national Coffee Strategy (2019-2033) and donor

programs, Ethiopia emphasized traceability, quality certification, and increased roasting within the country. Cooperatives and the Commodity Exchange rolled out traceability systems and specialty-lot branding, while exporters redirected sales toward Gulf and Asian buyers. In practice, this meant more direct cooperative trade channels, new roasting investments, and promotion of high-grade coffee to reduce exposure to foreign tariff barriers.

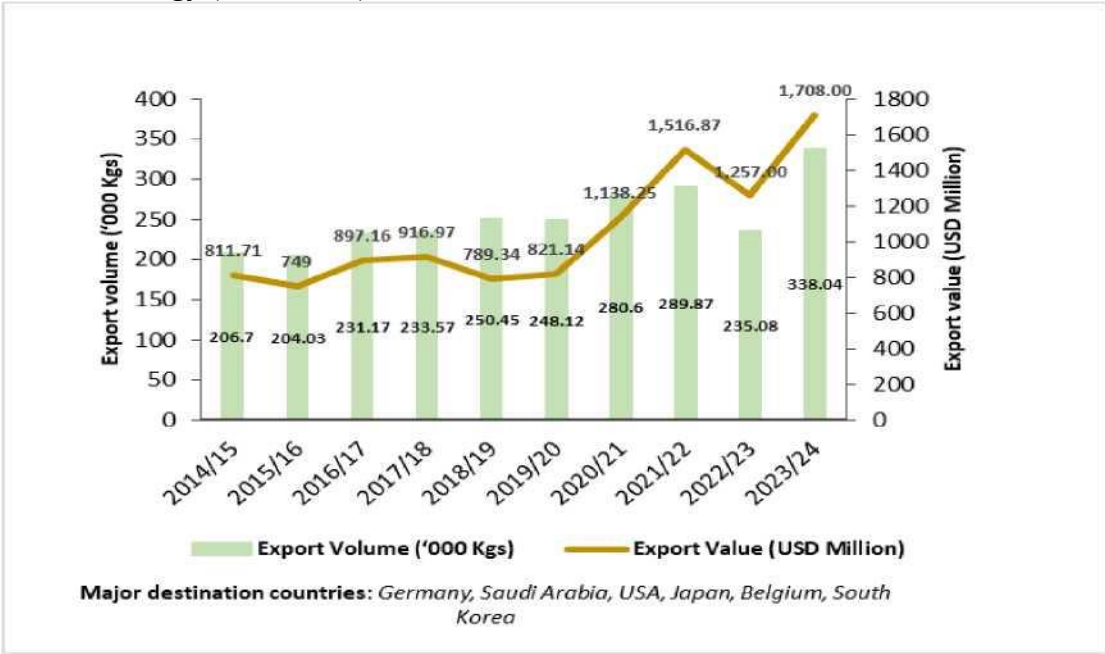


Figure 2: Ethiopian Koffee: export volume and export value trend (2015-2024)
Source: Author’s formation (2026)

Table 2 and Figure 2 reveal that Ethiopia’s coffee sector experienced a temporary contraction in export volumes following heightened trade uncertainty and the 2022 suspension of AGOA preferences, with exports falling from 289,873 metric tons in 2021/22 to 235,080 metric tons in 2022/23. However, export values remained comparatively resilient and

rebounded sharply to approximately US\$1.7 billion by 2023/24, suggesting a shift toward higher-value and specialty coffee segments. Changes in destination markets, including increased orientation toward Gulf and Asian buyers, further indicate adaptive reconfiguration. These trends corroborate policy and donor reports documenting Ethiopia’s emphasis on

traceability, cooperative-led exports, and domestic processing as mechanisms to offset tariff-induced vulnerability.

Nigeria

Nigerian staple exports long suffered from external tariff structures that favored raw commodities over processed goods (UNCTAD, 2024). Both the EU and U.S. tariff escalation and quota systems impose high duties on processed cassava, cocoa, and shea products, while raw roots and nuts enter more freely. This built-in tariff bias discouraged investment in local mills and processing, forcing farmers to rely on low-margin raw exports and leaving incomes vulnerable to price swings.

The government and communities responded with proactive industrial policies and cooperative models. The Central Bank’s Anchor Borrowers’ Programme (ABP) and Commodity Development Initiative (CDI) were expanded to link cassava farmers with new starch mills, providing credit, inputs, and market guarantees. In the shea sector, announced restrictions and policy measures aimed at discouraging raw nut exports, alongside incentives for domestic butter extraction, have encouraged value addition and channeled investment and training into women’s processing cooperatives. These steps aimed to rapidly boost processing capacity and improve quality to meet export standards.

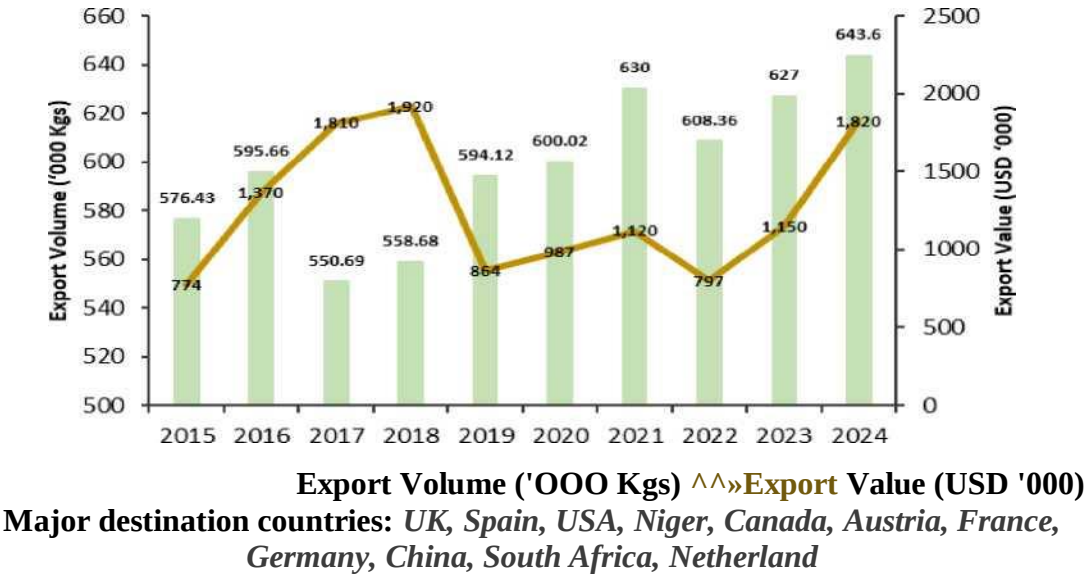


Figure 3: Nigeria Cassava: export volume and export value trend (2015-2024) Source: Author’s formation (2026)

As illustrated in Table 3 and Figure 3, Nigeria’s cassava exports exhibit

pronounced volatility between 2015 and 2023, with sharp declines in 2019 and 2022 followed by partial recoveries in subsequent years. While the table reflects volume fluctuations rather than value capture, the timing of stabilization aligns with the expansion

of domestic processing initiatives and cooperative-based aggregation models. Policy documents and sector reports indicate that these interventions were explicitly designed to reduce exposure to tariff escalation by redirecting output toward domestic starch and derivative processing. Thus, while export volumes alone cannot confirm value addition, the convergence of trade trends and policy evidence suggests an emerging shift away from raw-export dependency. Taken together, these developments suggest a gradual shift away from reliance on raw exports toward an expanding home-based processing sector, even as external tariff pressures persist.

Conclusion

Across Kenya, Ethiopia, and Nigeria, the evidence shows that external tariff and non-tariff shocks often spurred adaptation rather than collapse. Instead of remaining passive, each country's producers and institutions innovated their value chains from within. For example, Kenya's tea and horticulture sectors turned post-Brexit export barriers and stricter EU/US standards into an impetus for market diversification and quality upgrading. Cooperatives and export agencies helped Kenyan exporters pursue Gulf and Asian markets while investing in cold-chain and logistics improvements. In Ethiopia, the 2022 suspension from the U.S. AGOA scheme highlighted tariff escalation on processed coffee, prompting cooperative unions and the government to accelerate traceability systems, domestic roasting, and identity-preserved marketing of coffee. In Nigeria, widespread tariff escalation on agricultural commodities led to innovative policy responses: the

Central Bank's Anchor Borrowers' Programme and related initiatives linked farmers to processors and credit, spurring cassava starch mills and shea butter factories, while export bans on raw shea nuts channeled production toward higher-value domestic processing. In each case, shocks exposed structural weaknesses (e.g., over-reliance on raw exports or narrow markets) that local actors then addressed through diversification, value addition, and strengthening indigenous institutions.

Although the context and crops differ, a consistent comparative insight emerges: resilience was built from within rather than through continued external preferences. Kenyan, Ethiopian, and Nigerian actors leveraged their own comparative strengths, such as longstanding cooperatives, donor-backed traceability initiatives, and community networks, to retain more value domestically and find new buyers. As one analysis notes, "trade shocks... did not just cause loss, they catalysed adaptation". Kenya's well-developed cooperative structures and market intelligence allowed a quick pivot toward nontraditional buyers; Ethiopia's network of coffee cooperatives and an ECX-led traceability strategy helped rechannel trade into Asia and the Gulf; and Nigeria's state-led financing and emerging farmer associations have enabled the scaling of cassava and shea processing. Together, these experiences illustrate a regional shift: African agriculture is moving away from dependence on distant preferences and toward local industrialization, stronger regional integration (EAC, ECOWAS, AfCFTA), and indigenous innovation as a hedge against external shocks.

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