



# Trade in ECOWAS: Impact of US Tariffs

## Briefing Note

Release Date: 28<sup>th</sup> July 2025

On April 2<sup>nd</sup>, 2025, the United States announced a new trade policy that introduced a 10% tariff on all imported goods, with even higher 'reciprocal' rates for certain countries. While the focus is on larger economies like China and the European Union, this new policy also affects African countries, many of which are a part of ECOWAS. Each ECOWAS member would face a unique rate of tariff based on an erroneous formula which considers US bilateral trade deficits. However, on April 9<sup>th</sup> 2025, the US declared a 90-day suspension on applying tariffs for most countries, except for China. At that same time, the US also announced a 10% universal tariff on all imports, along with a number of sector specific tariffs that are all currently in force. The reciprocal tariffs were due to come into effect on July 9<sup>th</sup>. However, on July 7<sup>th</sup>, the White House announced another extension along with modifications to the reciprocal tariff rates. These tariffs are now to come into effect on August 1<sup>st</sup>. The analysis presented in this brief utilises a Trade Simulation Model to explore the potential impact of the currently applicable tariffs (as of 28/07/2025) and the threatened tariffs from the US (01/08/2025), against the situation before the Trump Administration took office.

### Relevance for ECOWAS

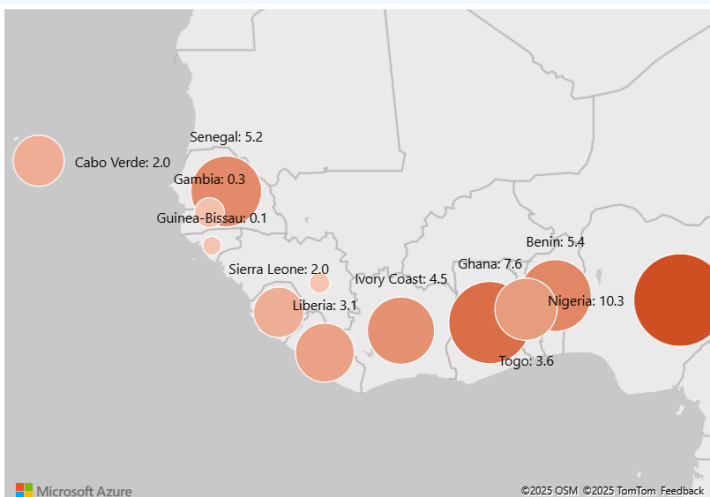
The new US new policy, once enforced, would lead to losses in trade across ECOWAS economies (post-2025), many of which previously benefited from duty-free access to the US market.

The highest shares of exports to the US among ECOWAS member states to the US market are as follows:

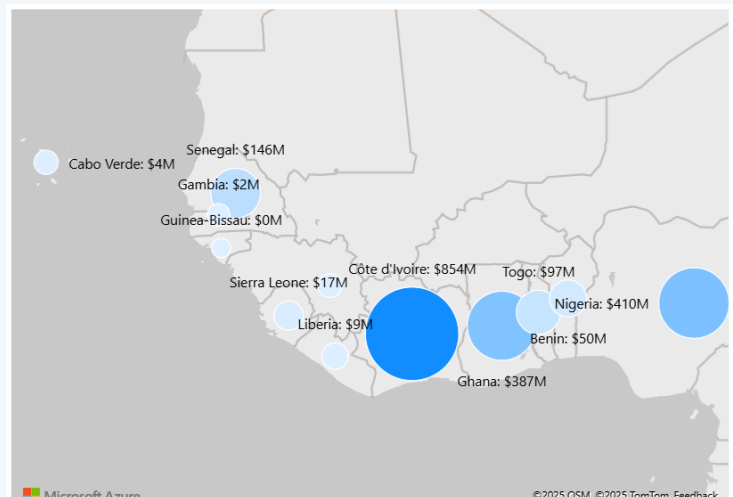
- Nigeria**, where **10.3%** of the country's total exports were destined for the US market.
- Ghana**, with **7.6%** of exports directed to the US,

-and to a lesser extent, **Benin**, **Senegal** and **Côte d'Ivoire** with the US accounting for **5.4%**, **5.2%** and **4.5%** of exports, respectively.

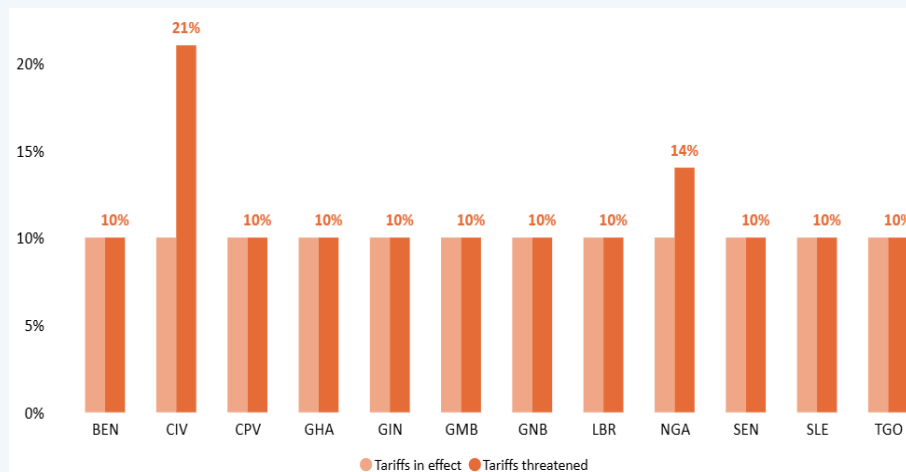
### Share of ECOWAS exports to the US market in 2024



### USA Imports from ECOWAS in 2024



### Current Vs Threatened Tariffs



Source: White House Executives Order, 2025

Note: Share (%) is calculated as the share of the country's exports to the US market

Source: IEC Calculations; UN Comtrade and ITC TradeMap

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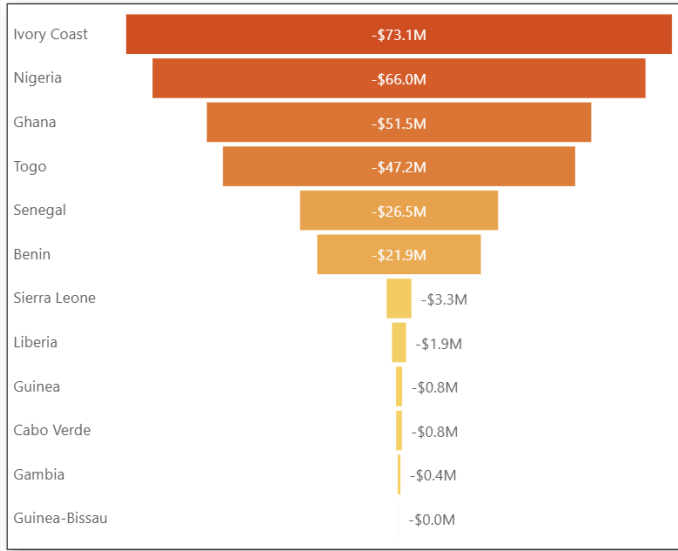


## Impact of US tariff rate increase on ECOWAS Member States

### Simulated trade loss by ECOWAS countries due to Tariffs in Effect (28 July 2025)

Annual change in US imports from ECOWAS:  
**US\$ 293 million**

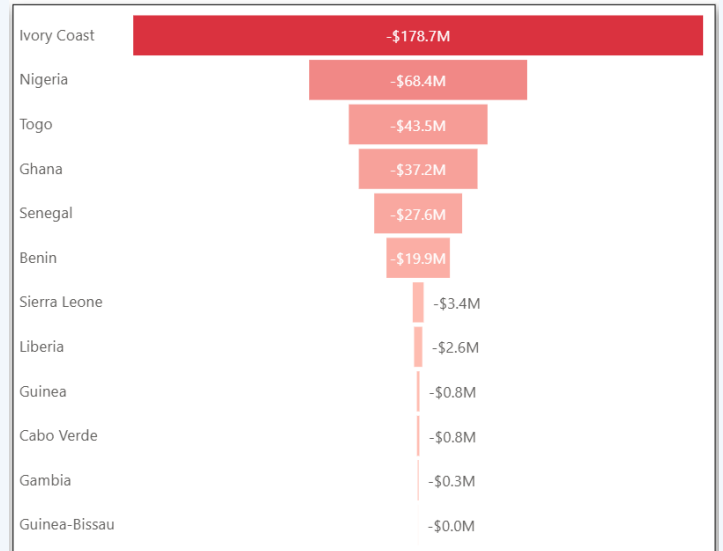
- Côte d'Ivoire's exports to the US fall more than any other ECOWAS Member State: **US\$ 73.1 million.**
- Nigeria's exports to the US drop by **US\$ 66.0 million** and Ghana's exports fall by **US\$ 51.5 million.**



### Simulated trade loss by ECOWAS countries due to Threatened Tariffs (1 August 2025)

Annual change in US imports from ECOWAS:  
**US\$ 383 million**

- Côte d'Ivoire's exports to the US fall more than any other ECOWAS Member State: **US\$ 178.7 million.**
- Nigeria's exports to the US drop by **US\$ 68.4 million** and Togo's exports fall by **US\$ 43.5 million.**

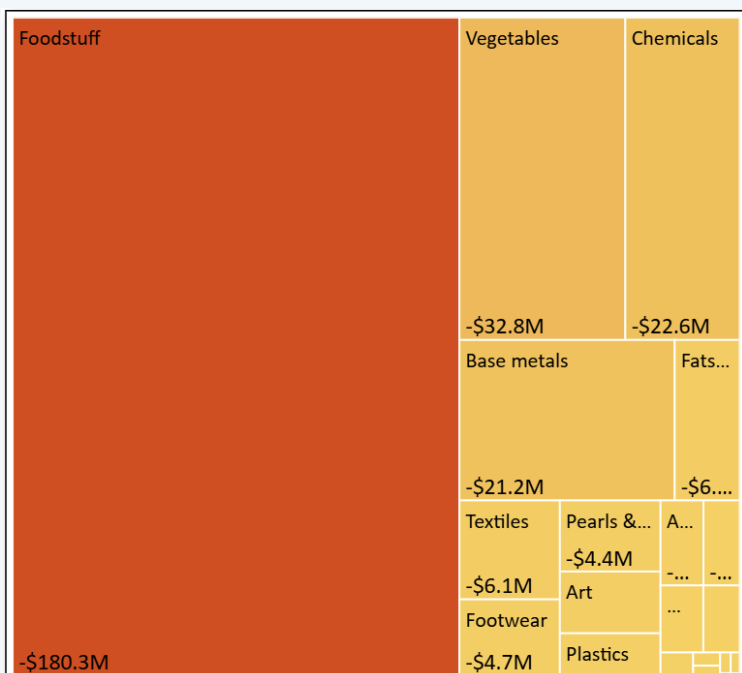


Source: International Economics Consulting [Trade Simulation Tool](#)

## Sector level impacts

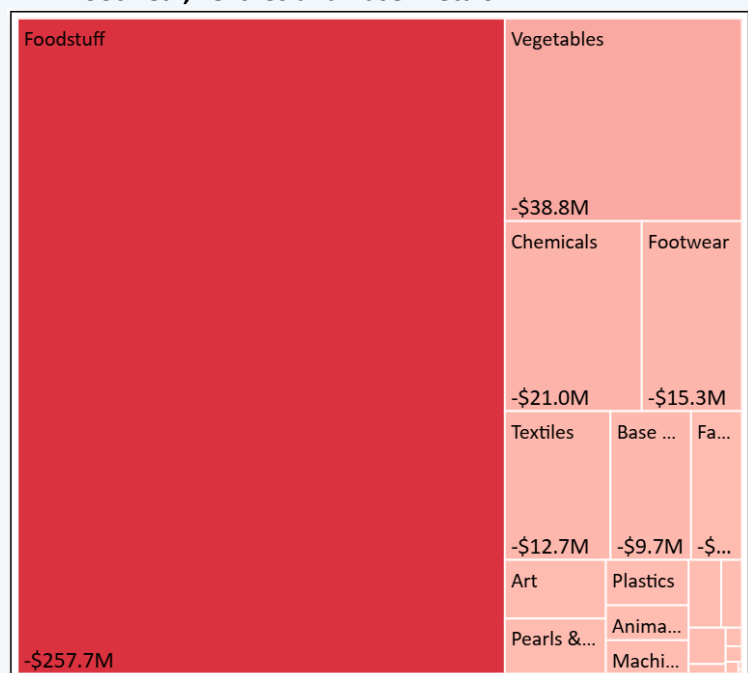
### Simulated trade loss by sector due to tariffs in effect

- The sector which is impacted the most is **Foodstuff** where exports fall by **US\$ 180.3 million**
- Other impacted sectors are **Vegetables, Chemicals, Base Metals** and **Fats**.



### Simulated trade loss by sector due to threatened tariffs

- The sector which is impacted the most is **Foodstuff** where exports fall by **US\$ 257.7 million**
- Other impacted sectors are **Vegetables, Chemicals, Footwear, Textiles** and **Base Metals**.



Source: International Economics Consulting [Trade Simulation Tool](#)

