TRADE MARK AFRICA
Growing Prosperity Through Trade

# Examining Trade Patterns between the EAC, ECOWAS and SADC

2026

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# Highlights

- EAC trade within Africa has grown by 53.9% in the first quarter of 2025 compared to the same quarter of 2024, with the value rising from $6.1 billion to $9.5 billion over the two quarters.
- Intra-African trade accounted for 27.5% of the EAC's overall trade in the first quarter in 2025.
- EAC-ECOWAS trade, though still modest at only 1.12% of the EAC's global trade, has expanded significantly, rising by 225%from $431 million in 2016 to $1.4 billion in 2024, reflecting growing trade potential between the two blocs.
- Similarly, EAC-ECOWAS quarterly trade almost doubled, rising from 0.7% of the region's total trade in the first quarter of 2024 to 1.3% in the same quarter of 2025.
- The growth was largely driven by imports from ECOWAS to EAC, which has grown from $51 million in 2016 to $1.24 billion in 2024, representing 1.81% of the region's total imports in 2024 while exports from the EAC to ECOWAS were valued at $152.9 million in 2024 accounting for only 0.27% of EAC overall exports.
- Gold accounted for 91% of EAC total imports from ECOWAS in 2024, indicating dominance in a single product while EAC key exports to ECOWAS in 2024 included Coconut, Twine, cordage, ropes and cables, of sisal or other textile fibres, Black fermented tea and partly fermented tea, whether or not flavoured, in immediate packings.
- Eastern Africa has an export potential of $203 million to Western Africa for all products, while Western Africa's potential to Eastern Africa is higher at $332 million across all products.
- EAC exports to ECOWAS are mainly driven by Kenya and Tanzania while Uganda is the largest importer for ECOWAS goods, followed by Rwanda, despite its smaller economy.
- The top exporting ECOWAS countries to EAC were Burkina Faso, Mali, and Ghana while Ghana and Nigeria were top EAC export destinations in 2024.
- The share of EAC's total global trade with SADC declined from a high of 25.4% in 2018 to 13.4% in 2024 with EAC exports to SADC being dominant, accounting for about 70% of total trade in 2016 and roughly 55% in 2024
- In 2024, EAC exports to SADC accounted for 16.6% of total EAC exports, while imports from SADC represented 10.7% of total EAC imports
- In 2024, over half of EAC exports to SADC came from copper and precious metals, reflecting the region's continued reliance on mineral-based trade while over 70% of EAC imports from SADC in the same period were mineral, industrial, or construction-related goods
- Tanzania and Kenya accounted for 74.1% of the EAC exports into SADC in 2024 while DRC and Uganda accounted for 71.3% of EAC imports from SADC in the same period
- South Africa, Zambia and Tanzania accounted for 85.9% exports into EAC in 2024 while DRC, Zambia and Tanzania contributed to 70.6% of imported goods from EAC in the same period.
- Export potential from Eastern Africa to Southern Africa is estimated at around $2 billion, with about $1.5 billion still untapped.
- Trade between EAC, ECOWAS and SADC countries is hindered by persistent non-tariff barriers notably customs and technical regulations, SPS measures, poor infrastructure, and multiple border and police checks that cause delays, high costs, and weak corridor connectivity across major trade routes.

# Introduction

In advancing regional integration, Africa has established several regional blocs including, East African Community (EAC) in East Africa, Southern African Development Community (SADC) in Southern Africa and Economic Community of West African States (ECOWAS) in West Africa among others. EAC is a regional intergovernmental organization comprising eight Partner States including Kenya, Tanzania, Uganda, Rwanda, Burundi, South Sudan, Democratic Republic of Congo and Somalia. The EAC aims at widening and deepening co-operation among the partner states and other regional economic communities in, among others, political, economic and social fields for their mutual benefit (EAC Secretariat).

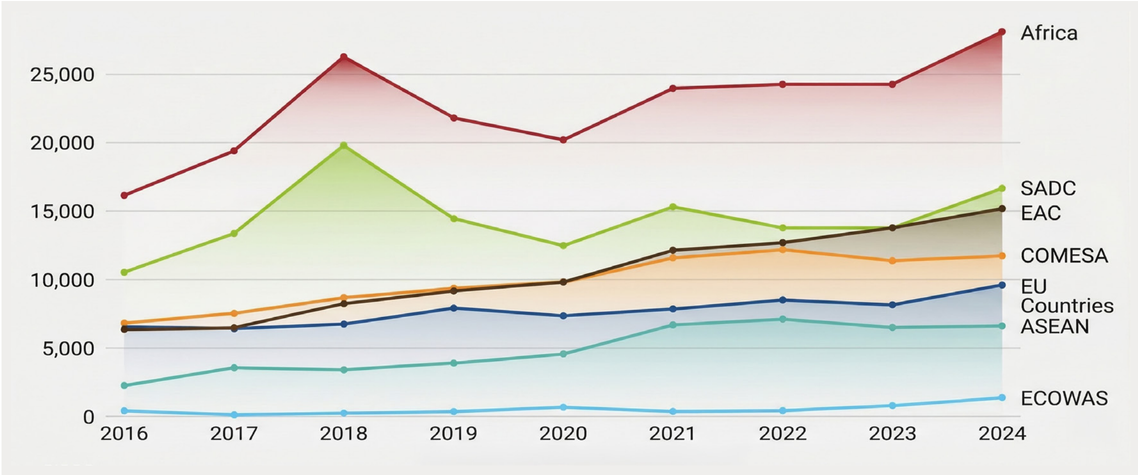
ECOWAS currently consists of 12 member countries including Benin, Cabo Verde, Cote d'Ivoire, The Gambia, Ghana, Guinea, Guinea-Bissau, Liberia, Nigeria, Senegal, Sierra Leone, and Togo following withdrawal of Niger, Mali, and Burkina Faso in January 2025.

The objective of ECOWAS is to promote economic cooperation among member states in order to raise living standards and promote economic development. In addition, it also aims at developing a peacekeeping force for conflicts in the region.

SADC comprises of 16 Member States; Angola, Botswana, Comoros, Democratic Republic of Congo, Eswatini, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, United Republic of Tanzania, Zambia and Zimbabwe. The mission of SADC is to promote sustainable and equitable economic growth and socio-economic development through efficient, productive systems, deeper cooperation and integration, good governance and durable peace and security; so that the region emerges as a competitive and effective player in international relations and the world economy.

In the wake of African Continental Free Trade Area (AfCFTA), trade within Africa has expanded significantly (Figure 1). Over the past decade, EAC trade with other regional communities and with Africa has deepened within the continent increasing from $16.2 billion in 2016 to over $28.1 billion in 2024. Further, quarterly analysis shows that EAC trade within Africa grew by 53.9%, increasing from $6.1 billion in the first quarter of 2024 to $9.5 billion in the same quarter of 2025. The upward trend highlights Africa's growing importance as a primary market for the EAC compared to traditional external partners.

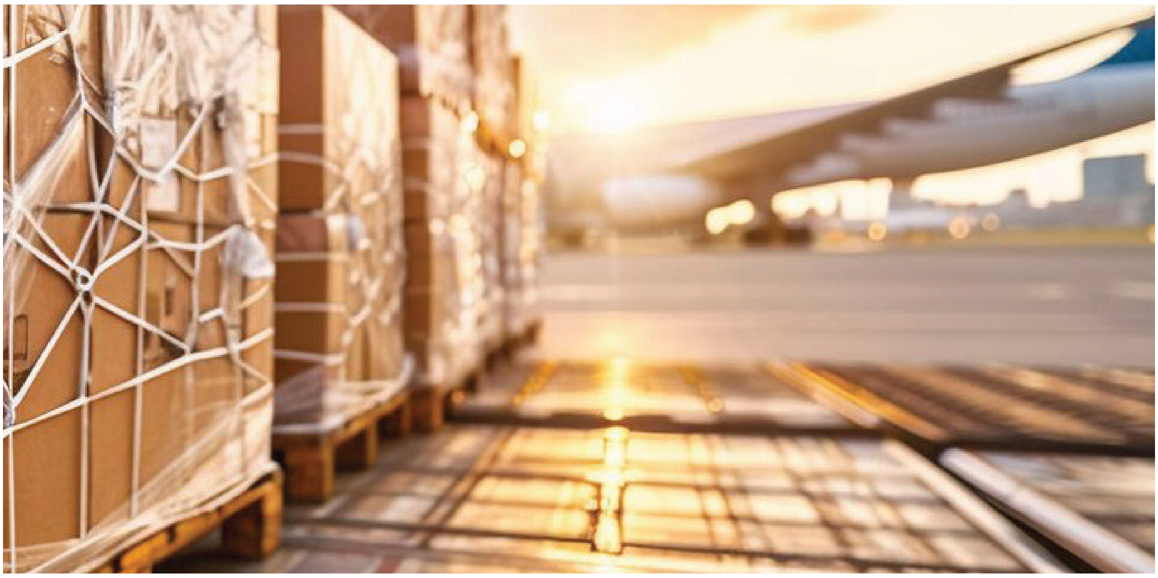
FIGURE 1: EAC TOTAL TRADE TREND WITH OTHER GLOBAL PARTNERS (US MILLION)




Data Source: EAC Data Portal

Within Africa, intra-EAC trade has grown significantly, alongside strong growth in trade between the EAC and other Regional Economic Communities (RECs), particularly COMESA and SADC. This growth may be attributed to regional integration efforts and geographic proximity, both of which continue to drive trade flows (Figure 1). Intra-EAC trade has significantly expanded from $6.4 billion in 2016 to $15.2 billion in 2024 representing more than 100% growth while trade with COMESA grew from $6.8 billion in 2016 to $11.8 billion in 2024 representing approximately 75% growth.

Equally significant is the growth of EAC-SADC trade, which expanded from $10.5 billion to $16.6 billion representing a growth of approximately 58% during the same period. While EAC trade with ECOWAS remains relatively small, it has grown substantially by about 225%, from $431 million in 2016 to $1.4 billion in 2024.



# Overview of EAC Trade with RECs

## EAC-ECOWAS Trade Trends

ECOWAS's share of the EAC's total global trade has risen significantly from 0.8% in 2016 to 1.1% in 2024 (Table 1) while its share of the EAC's total trade within Africa increased more noticeably from 2.7% to 5.0% over the same period. This represents more than a threefold increase in absolute trade value, signaling deepening inter-regional trade. Similarly, quarterly trade between the two RECs almost doubled, rising from 0.7% of the region's total trade in the first quarter of 2024 to 1.3% in the same quarter of 2025. (Table 1 Annex). In line with this performance, trade between the EAC and ECOWAS recorded a sharp year-on-year increase, rising from $822.6 million in 2023 to $1.4 billion in 2024 equivalent to about 70% growth. The growth was largely driven by imports from ECOWAS which expanded by about 78.5% in 2024 amounting to $1,242.1 million, though slightly lower than a growth of 115.9% recorded in 2023. Consequently, the share of ECOWAS in the EAC's overall imports grew from 1.1% in 2023 to 1.8% in 2024. This was largely driven by import of goods from key dominating sectors such as minerals and petroleum, agriculture and agro-processing, machinery and industrial equipment and chemicals and cosmetics

During the same period, EAC exports to ECOWAS also grew but only by 20.7% amounting to $152.95 million in 2024 compared to the previous year. This reflected a recovery compared to 2023, when exports had declined by 8.2% amounting to $126.74 million from the previous year. Growth in exports was largely attributed to exports of products in the sectors of Agriculture & Agro-base, Industrial/Manufactured and Pharmaceuticals/Chemicals. However, share of total EAC exports to ECOWAS has been minimal in the recent years representing approximately only 0.3% of EAC overall value of exports in 2024.

The overall growth in trade between the two regional blocs could primarily be underpinned by investment in regional infrastructure, harmonized customs procedures, and coordinated cross-border policies easing trade facilitation between the two regional blocs. In the past five years EAC and ECOWAS have advanced corridor facilitation frameworks, supported by initiatives like the Borderless Alliance and technical partnerships with the African Union and Afreximbank which has led to reduced time in cargo clearance, reduced informal trade and increased regional standards compliance.

| TABLE 1: TRADE FLOWS BETWEEN EAC AND ECOWAS | | | | | | |
|---|---|---|---|---|---|---|
| **Year** | **Exports (US Million)** | **Share of Total Exports** | **Imports (US Million)** | **Share of Total Imports** | **Total Trade (US Million)** | **Share of Total Trade** |
| **2016** | 380.00 | 1.85 | 51.04 | 0.15 | 431.0 | 0.77 |
| **2017** | 74.52 | 0.29 | 43.80 | 0.11 | 118.3 | 0.18 |
| **2018** | 115.89 | 0.34 | 119.32 | 0.27 | 235.2 | 0.30 |
| **2019** | 111.99 | 0.35 | 228.08 | 0.48 | 340.1 | 0.43 |
| **2020** | 129.41 | 0.38 | 537.30 | 1.23 | 666.7 | 0.86 |
| **2021** | 99.39 | 0.23 | 269.13 | 0.51 | 368.5 | 0.39 |
| **2022** | 138.08 | 0.34 | 322.26 | 0.49 | 460.3 | 0.43 |
| **2023** | 126.74 | 0.28 | 695.81 | 1.09 | 822.6 | 0.76 |
| **2024** | 152.95 | 0.27 | 1242.14 | 1.81 | 1395.1 | 1.12 |

Source: EAC Data Portal

## EAC-SADC Trade Trends

Trade between the EAC and SADC has exhibited fluctuating trends over the period 2016–2024, reflecting varying levels of integration and competitiveness between the two blocs (Table 2). The share of EAC's total global trade with SADC declined from a high of 25.4% in 2018 to 13.4% in 2024, suggesting a gradual weakening of trade intensity after a period of strong growth between 2016 and 2018.

Between 2016 and 2018, trade between the two regions expanded substantially, with total trade values rising from $10.5 billion in 2016 to $19.8 billion in 2018, an increase of almost 88%. This rapid growth was driven primarily by EAC exports to SADC, which more than doubled during this period. However, from 2019 onwards, the trade trajectory shifted downward, with total trade falling to $12.5 billion in 2020 and recovering modestly to $16.6 billion in 2024. The decline in SADC trade share with EAC from 18.2% in 2019 to 13.4% in 2024 could be attributed to challenges, including disharmonized procedures, presence of multiple agencies at the same control points, uncoordinated operations, inadequate infrastructure, various charges contributing to tariff barriers, and lengthy procedures leading to non-tariff barriers as reported in the recent Time Release Study (TRS) that analyses trade barriers along the North-South Corridor.

In terms of export and import composition, EAC exports to SADC remained dominant, accounting for about 70% of total trade in 2016 and roughly 55% in 2024. The share of total EAC exports to SADC declined sharply from 45.4% in 2018 to 16.6% in 2024. Meanwhile, imports from SADC maintained a relatively stable share of around 10–11% of total EAC imports over the period, indicating strong dependence on SADC-origin intermediate and industrial goods such as minerals, fuel, machinery, and manufactured inputs.

| TABLE 2: TRADE FLOWS BETWEEN EAC AND SADC | | | | | | |
|---|---|---|---|---|---|---|
| **Year** | **Exports** | **Share of Total Exports** | **Imports** | **Share of Total Imports** | **Total Trade (US Million)** | **Share of Total Trade** |
| **2016** | 7472.74 | 36.4 | 3067.04 | 8.7 | 10539.8 | 18.93 |
| **2017** | 9899.90 | 38.2 | 3457.82 | 8.8 | 13357.7 | 20.44 |
| **2018** | 15527.70 | 45.4 | 4286.20 | 9.8 | 19813.9 | 25.44 |
| **2019** | 9420.44 | 29.3 | 5057.60 | 10.7 | 14478.0 | 18.19 |
| **2020** | 7538.23 | 22.4 | 4942.46 | 11.4 | 12480.7 | 16.17 |
| **2021** | 9752.98 | 22.6 | 5565.42 | 10.6 | 15318.4 | 16.04 |
| **2022** | 7279.15 | 17.9 | 6510.86 | 10.0 | 13790.0 | 13.01 |
| **2023** | 6791.82 | 15.2 | 7002.15 | 10.9 | 13794.0 | 12.67 |
| **2024** | 9282.87 | 16.6 | 7379.79 | 10.7 | 16662.7 | 13.38 |

Data Source : EAC Data Portal

# Top Exports, Imports and Emerging Products

## Major EAC-ECOWAS Traded Goods

EAC Partner States remain net exporters of agricultural or agro-based products and only a few manufactured or industrial products to ECOWAS (Figure 2). The top export commodities to ECOWAS in 2024 are Coconut which contributes 23.5%. Other commodities contributing less than 10% are; Twine, cordage, ropes and cables, of sisal or other textile fibres, Black fermented tea and partly fermented tea, whether or not flavoured, in immediate packings, Medicaments consisting of mixed or unmixed products for therapeutic, Jute and other textile bast fibres, raw or retted (excl. flax, true hemp and ramie), Whole raw hides and skins of bovine "incl. buffalo" or equine animals, whether or not dehaired, Water-pipe tobacco (excl. tobacco-free. See subheading note 1.) and Generating sets (excl. wind-powered and powered by spark-ignition internal combustion piston. The remaining commodities each contributed less than 3.6 percent, cumulatively accounting for 37.7 percent of EAC exports to ECOWAS in 2024.

EAC imports from ECOWAS are mainly dominated by single product (Figure 3). Gold accounted for 91.1% of all EAC imports from ECOWAS in 2024. The second-largest product is petroleum products, with medium oils accounting for only 3.5% and light oils for 0.3% respectively, highlighting the significance of imports related to energy. Other key products that contribute marginally includes soups, brewery equipment, cocoa powder, semi-manufactured gold, cosmetics and skincare products, and crude palm kernel oil, contributing less than 1% each. All other remaining products contributed to 2.6% cumulatively of the total EAC imports from ECOWAS. While there is little diversification into other commodity categories, the import structure generally demonstrates a strong reliance on the trade in minerals, especially gold.

FIGURE 2: EAC TOP EXPORTS TO ECOWAS IN 2024 AS A PERCENT OF TOTAL EXPORTS TO THE REGION

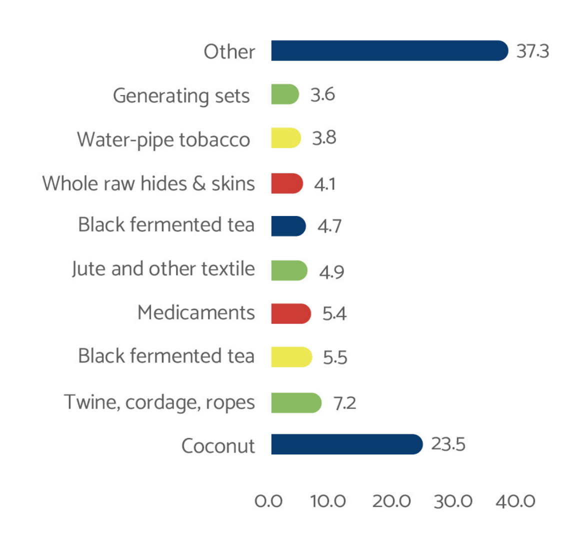
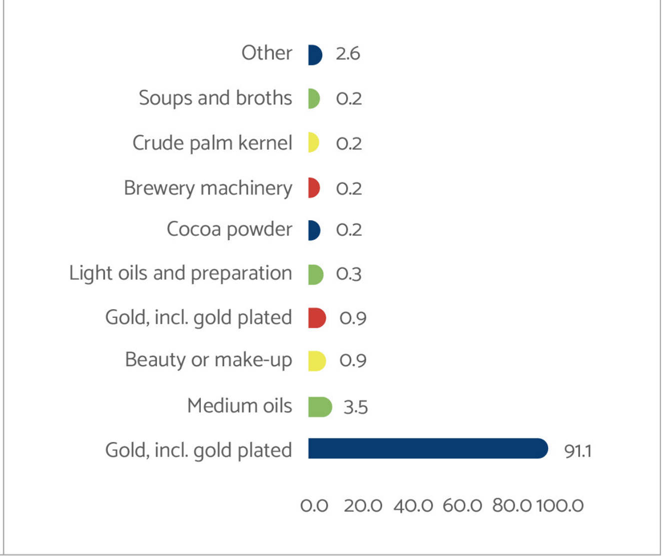



FIGURE 3: TOP PRODUCTS EAC'S IMPORTS FROM ECOWAS IN 2024 AS A PERCENT OF TOTAL IMPORTS FROM THE REGION




Source: ITC Trademap

## Major EAC-SADC Traded Goods

EAC exports to SADC in 2024 were dominated by copper and articles thereof (31.4%), followed by precious stones and metals (26.3%) (Figure 4). This composition reflects a strong concentration in mineral-based exports, underscoring the EAC's continued dependence on extractive sectors for its trade with Southern Africa. Together, these two commodities accounted for over 57% of total exports, indicating limited diversification and low participation in higher-value segments of regional value chains. Other key exports included mineral fuels (3.5%), meat and edible meat offal (3.5%), and vegetable oils (2.1%), showing emerging trade in agricultural and agro-processed goods within the region. Beverages (2.1%), iron and steel (2.1%), and vehicles (1.9%) accounted modestly, suggesting that industrial and manufactured exports though still small are gaining some traction in intra-African trade flows. Inorganic chemicals (1.8%) and construction materials (1.7%) further point to the presence of growth in industrial exports, particularly linked to processing and light manufacturing sectors.

While exports to SADC remain heavily commodity-based, there are clear indications of diversification into processed and semi-processed goods, driven by increased investment in agro-processing, livestock, and light industrial production within the EAC. This gradual shift indicates growing potential for the EAC to expand its manufacturing footprint and integrate more deeply into Southern Africa's industrial supply chains.

EAC imports from SADC are dominated by precious stones and metals, which account for 30.9% of total imports (Figure 5). This reflects the continued importance of mineral-related products and jewelry from Southern Africa, especially from countries such as South Africa and Tanzania's participation in mineral beneficiation value chains. Mineral fuels and oils (10%) and cereals (8.3%) are also key products showing the EAC's dependence on SADC for energy inputs and key food commodities. Imports of machinery and mechanical appliances (5%), iron and steel (4.4%), and vehicles (3.2%) point to a strong flow of industrial and manufacturing inputs that support infrastructure development and industrial activity across the EAC.

The relatively modest shares of cosmetics and essential oils (2.8%), construction materials (2.7%), articles of iron or steel (2.6%) and electrical machinery (2.4%) suggest a diversified but still resource-heavy import composition. Overall, over 70% of imports from SADC are either mineral, industrial, or construction-related, highlighting SADC's role as a key supplier of intermediate and capital goods to the EAC region.

FIGURE 4: EAC TOP EXPORTS TO SADC IN 2024 AS A PERCENT OF TOTAL EXPORTS TO THE REGION

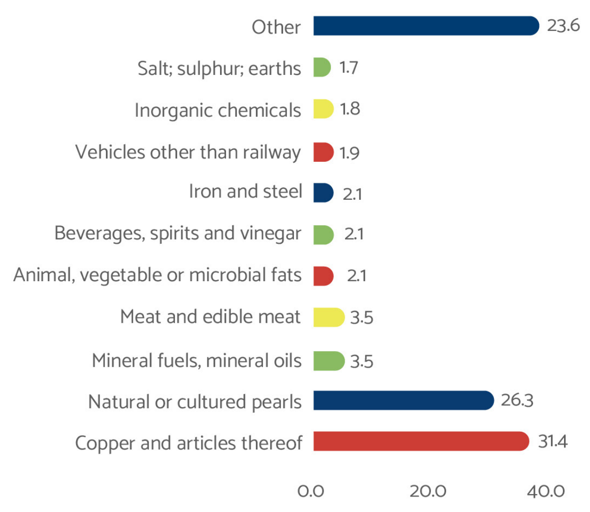
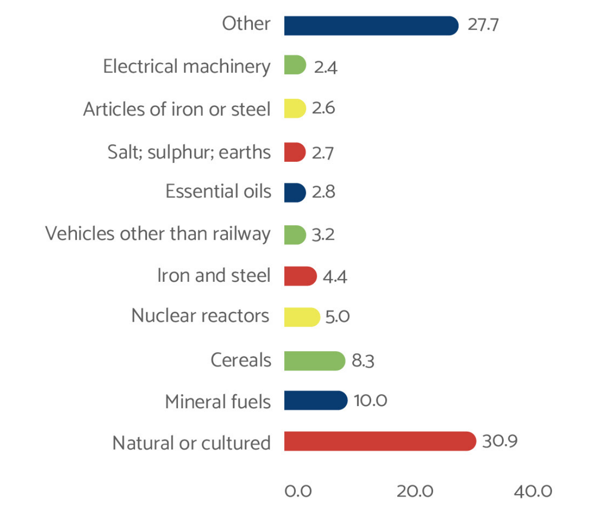



FIGURE 5: TOP PRODUCTS EAC'S IMPORTS FROM SADC IN 2024 AS A PERCENT OF TOTAL IMPORTS FROM THE REGION




# Key Export and Import Destinations

## EAC-ECOWAS Key Partners

Figure 6 shows overall bilateral trade between the EAC and ECOWAS from 2019 to 2024, highlighting Uganda as the dominant player, with trade rising sharply from $175.1 million in 2019 to over $1,038.3 million in 2024. Rwanda, Kenya and the DRC also emerged as key partners, though at lower levels compared to Uganda. While Tanzania maintains moderate trade flows, Burundi and South Sudan recorded minimal trade with ECOWAS throughout the period. Overall, the data highlights a strong upward trend in the value of trade, driven mainly by Uganda's surge in 2024.

**FIGURE 6: OVERALL BILATERAL TRADE BETWEEN EAC AND ECOWAS (TOTAL TRADE $ MILLION)**

| | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |
|---|---|---|---|---|---|---|
| Uganda | 175.12 | 363.7 | 214.49 | 16.55 | 440.23 | 1,038.31 |
| Rwanda | 22.86 | 119.35 | 31.52 | 66.3 | 95.04 | 122.03 |
| Kenya | 62.82 | 67.71 | 76.97 | 167.45 | 101.26 | 103.8 |
| DRC | 40.83 | 96.3 | 20.61 | 115.86 | 109.24 | 74.76 |
| Tanzania | 35.19 | 17.21 | 22.36 | 91.28 | 72.6 | 54 |
| Burundi | 2.47 | 1.22 | 2.31 | 1.55 | 4.04 | 1.58 |
| South Sudan | 0.77 | 1.22 | 0.27 | 1.35 | 0.15 | 0.61 |

Source: ITC Trademap

Most EAC exports to ECOWAS come from Kenya, Tanzania, and to a lesser extent, Uganda (Figure 7). In 2024, Kenya's exports to ECOWAS amounted to $91.1 million, while Tanzania's was $40.8 million. On a smaller scale, Uganda is also a noteworthy exporter, with a high of $19.2 million in 2023 and a decline to $15.6 million in 2024. Rwanda, Burundi, and South Sudan, on the other hand, continue to be minor players, with exports that are consistently below $2 million. The DRC's exports to ECOWAS have been inconsistent attributed to DRC's bilateral trading costs being higher with most AU partners than with those outside the region (e.g., China, UK, US), presenting a challenge according to Prachi Agarwal (2022) in the ODI-GIZ AfCFTA Policy Paper Series2.

Uganda is the largest importer from ECOWAS with imports rising from $356.9 million in 2020 to over $1.0 billion in 2024 (Figure 8). This highlights Uganda's role as the primary entry point for ECOWAS commodities into the EAC. Despite its smaller economy, Rwanda is the second-largest importer, with $121.1 million in 2024 showing the country's dependence on ECOWAS goods. The DRC additionally contributes significantly, with a highest of $113.6 million in 2022 before dropping to $70.4 million in 2024. Despite being bigger economies and key exporters to ECOWAS, Kenya and Tanzania, on the other hand, record relatively low imports from ECOWAS, in the period. Kenya's imports fell from $85.9 million in 2022 to $12.7 million in 2024, while Tanzania's imports fell from $51.1 million to $13.2 million in the same period.

2 http://cdn-odi-production.s3-website-eu-west-1.amazonaws.com/media/documents/GIZ_DRC.pdf

FIGURE 7: EAC TOTAL EXPORTS TO ECOWAS BY COUNTRY (US MILLION)

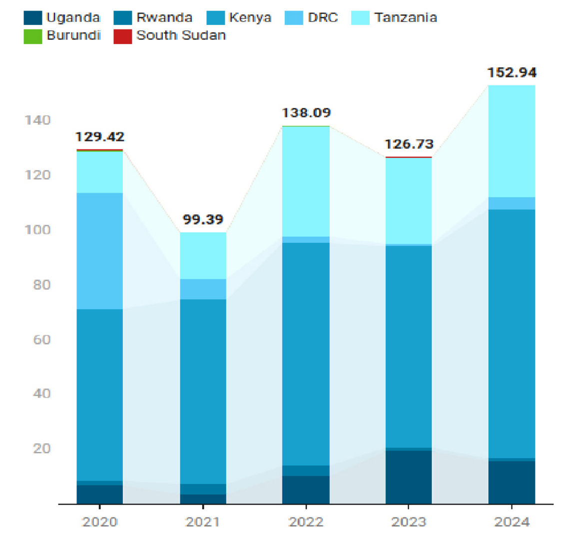
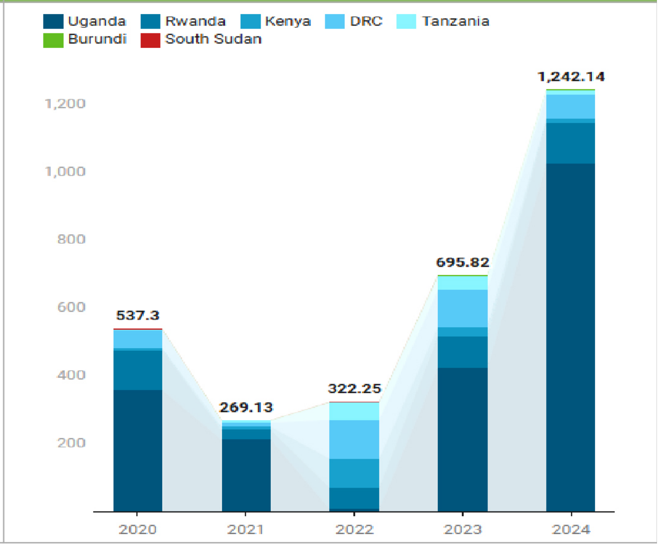



FIGURE 8: EAC TOTAL IMPORTS FROM ECOWAS BY COUNTRY (US MILLION)




Source: ITC Trademap

The top exporting ECOWAS countries to EAC are Burkina Faso, Mali and Ghana with exporting values of $444.8 million, $361.3 million and $227.9 million respectively in 2024 (Figure 9). This is explained by their exports, which are mostly focused on minerals, precious metals (especially gold), and agricultural products. The EAC's growing need for minerals is met by their abundant resource endowment, especially in gold, which solidifies their position as the top exporters. Mali and Burkina Faso who have already exited ECOWAS are emerging as key exporters to the EAC, having rapidly risen in 2023 and 2024 from modest volumes to major exporting markets.

On the other hand, following their highest years in 2022 to 2023, Côte d'Ivoire, Togo, and Liberia saw significant decreases in 2024. The decline in Côte d'Ivoire's exports to the EAC can be attributed to a sharp reduction in its key export to Kenya which included animal, vegetable or microbial fats and oils and their cleavage products and prepared edible fats following Kenya's policy to cut edible oil imports by 50% as part of its strategy to promote local production and reduce import dependence. Gambia, which had been a major exporter in 2020 and 2021 is no longer exporting in 2024. Benin, Niger, Sierra Leone, Guinea, Cabo Verde, and Guinea-Bissau, on the other hand, exports minimally to EAC.

Ghana and Nigeria continue to be the top EAC export destinations in ECOWAS, with respective values of $84.2 million and $152.7 million in 2024 (Figure 10). Côte d'Ivoire maintained modest imports from EAC in recent years, averaging between $17 and $25 million. Previously robust markets such as Senegal and Burkina Faso saw drops in 2024, to $11.1 million and $9.0 million, respectively. With imports of $5.3 million, $5.0 million, and $4.1 million, respectively, Sierra Leone, Togo, and Guinea had significant improvements in 2024, demonstrating steady growth from extremely low contribution. Cabo Verde, Benin, Niger, and Guinea-Bissau, are marginal players, importing less than $2.5 million each in 2024.

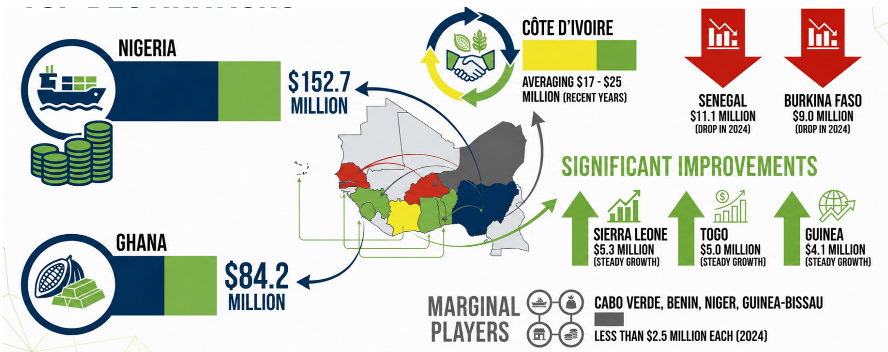


FIGURE 9: LIST OF SUPPLYING MARKETS FROM ECOWAS FOR A PRODUCT IMPORTED BY EAC (US MILLION)

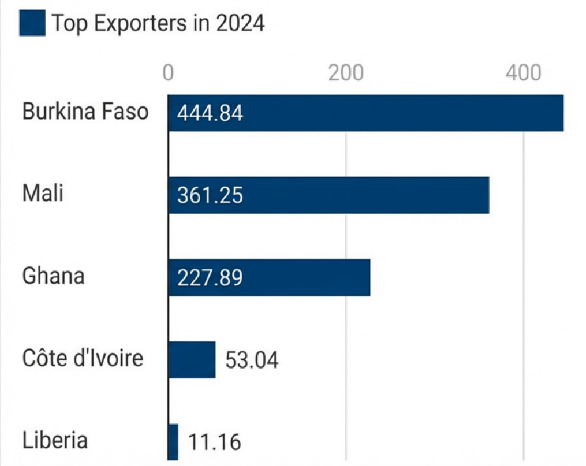
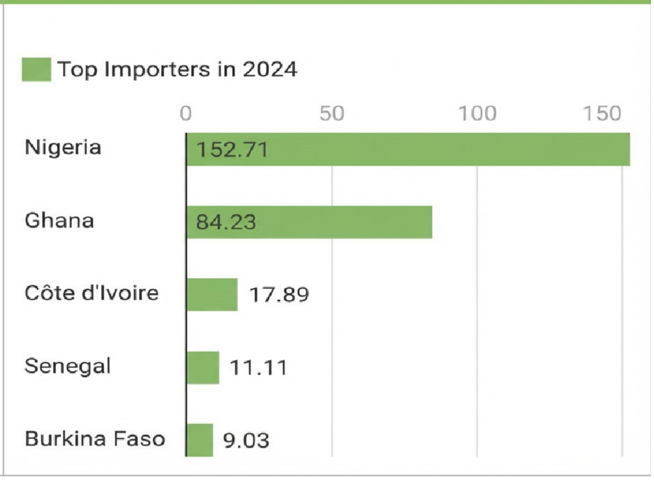



FIGURE 10: LIST OF IMPORTING MARKETS FROM ECOWAS FOR A PRODUCT EXPORTED BY EAC (US MILLION)




Source: ITC Trademap

## EAC–SADC Key Partners

Trade between the EAC and SADC was primarily driven by Tanzania and Kenya in 2024, which have emerged as the leading exporters to SADC within the bloc (Figure 11). Tanzania recorded a strong upward trend, with exports rising from **$1.44** billion in 2020 to **$2.97** billion in 2024 more than doubling within five years. This could be attributed to the overlapping membership of Tanzania in the SADC and EAC. Kenya also demonstrated consistent growth, with exports increasing from **$583.9** million in 2020 to **$975.4** million in 2024, driven largely by petroleum, pharmaceutical and agro-processed products including chemicals, plastics, and machinery, while benefiting from improved logistics through the Port of Mombasa.

Uganda exports increased from **$389.7** million in 2020 to **$684.9** million in 2024, reflecting sustained but smaller trade flows in agro-industrial goods. In contrast, the Democratic Republic of Congo (DRC) showed a sharp contraction in exports, dropping from a peak of **$8.15** billion in 2022 to only **$618.8** million in 2024, likely due to trade barriers resulting from complex regulations, a multiplicity of overlapping administrative agencies, and a frequent lack of capacity and control by officials responsible for regulatory enforcement, poor infrastructure along the borders and political instability. Similarly, DRC is a member of both SADC and EAC. Smaller economies such as Burundi and Rwanda exhibited mixed trends with Burundi's exports increasing steadily from **$43.1** million to **$62.3** million over the period, while Rwanda's exports declined dramatically from **$688.1** million in 2021 to just **$7.7** million in 2024. Somalia and South Sudan remained marginal exporters, contributing negligible volumes. Overall, the data reveal increasing concentration of EAC exports to SADC in Tanzania and Kenya, which together accounted for over 42.5% of the bloc's total exports by 2024.

On the other hand, DRC consistently emerged as a key partner of EAC imports, with values surging from **$1.17** billion in 2020 to a peak of **$5.57** billion in 2022, before moderating to **$3.29** billion in 2024 (Figure 12). This trend underscores DRC's central role in the regional supply of minerals, petroleum products, and metals. Uganda also exhibited a sharp upward trajectory, with imports rising significantly from **$1.52** billion in 2020 to **$2.70** billion in 2024. Kenya and Tanzania, maintained relatively steady import values over the period, averaging around **$1.0–1.2** billion and **$0.7–0.8** billion, respectively despite being key exporters to SADC.

In contrast, Rwanda and Burundi recorded a gradual decline in imports from SADC, reflecting reduced participation in regional sourcing, possibly due to logistics costs or shifting trade preferences. Imports by Somalia and South Sudan remained minimal and volatile, underlining limited trade integration with SADC markets.

**FIGURE 11: EAC TOTAL EXPORTS TO SADC BY COUNTRY (US MILLION)**

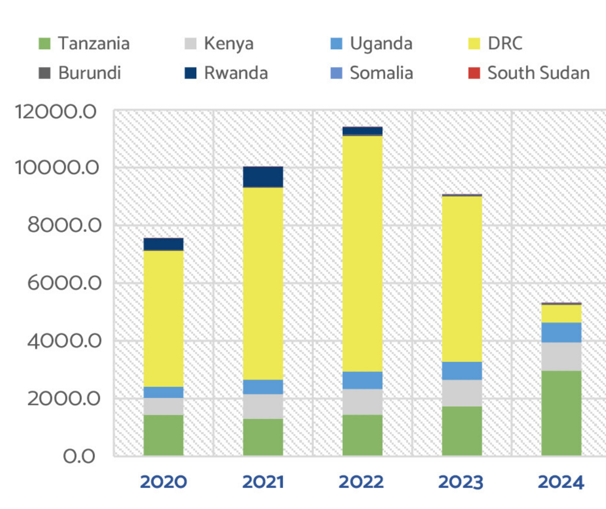
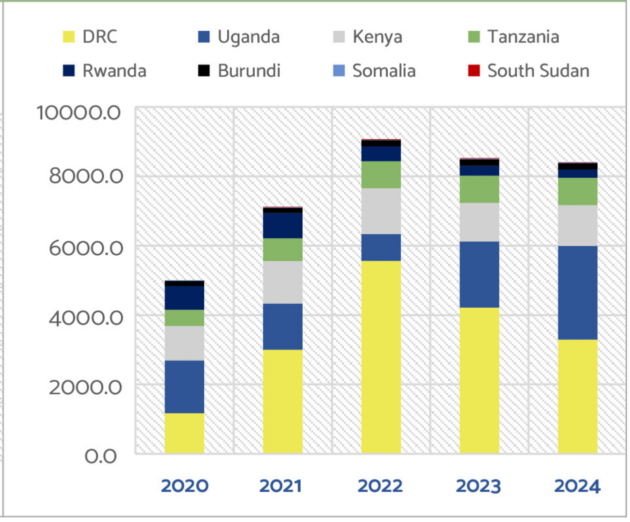



**FIGURE 12: EAC TOTAL IMPORTS FROM SADC BY COUNTRY (US MILLION)**




Source: ITC Trademap

Figure 13 shows that in 2024, South Africa was the dominant exporter to the EAC, with exports worth $2.64 billion in 2024 driven by manufactured goods, vehicles, and machinery. Zambia followed at $1.49 billion, mainly from copper and mineral products, while Tanzania ranked third at $1.15 billion, reflecting strong intra-regional trade in fuels and agro products. Other exporters such as Namibia, Eswatini, Angola, and Malawi recorded modest but steady exports, largely agro-based or processed goods. The DRC contributed $77 million, showing limited trade despite dual membership. Overall, EAC imports from SADC remain concentrated in South Africa and Zambia, underscoring the need to diversify and strengthen industrial and value-chain linkages across both blocs.

Despite DRC contributing minimally to EAC exports, it's the key largest importer of products from EAC Figure 14. In 2024, the DRC was the top importer from the EAC, with imports of $1.08 billion, followed by Zambia ($872 million) and Tanzania ($527 million), reflecting strong regional integration. Malawi and Namibia imported $390 million and $182 million, respectively, mainly in agro and manufactured goods. South Africa, Zimbabwe, Mozambique, and Mauritius recorded smaller but steady import levels.

**FIGURE 13: LIST OF SUPPLYING MARKETS FROM SADC FOR A PRODUCT IMPORTED BY EAC (US MILLION)**

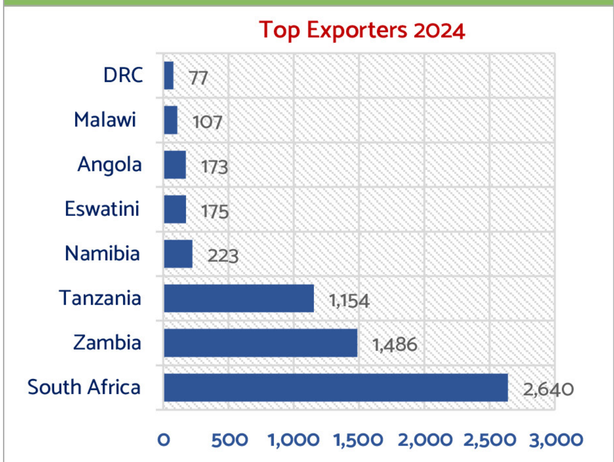
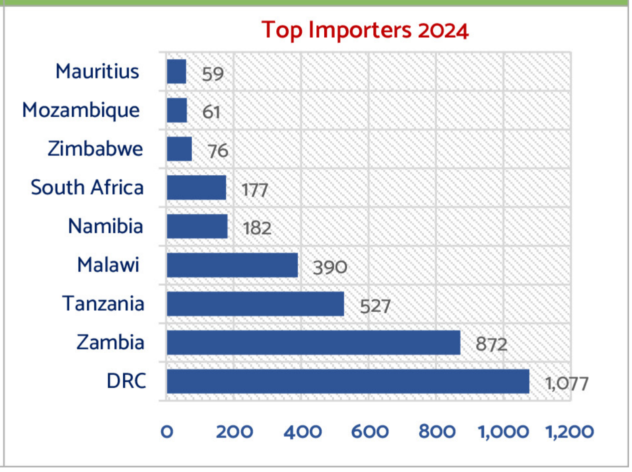



**FIGURE 14: LIST OF IMPORTING MARKETS FROM SADC FOR A PRODUCT EXPORTED BY EAC (US MILLION)**




Source: ITC Trademap

# EAC Untapped Trade Potential with ECOWAS and SADC

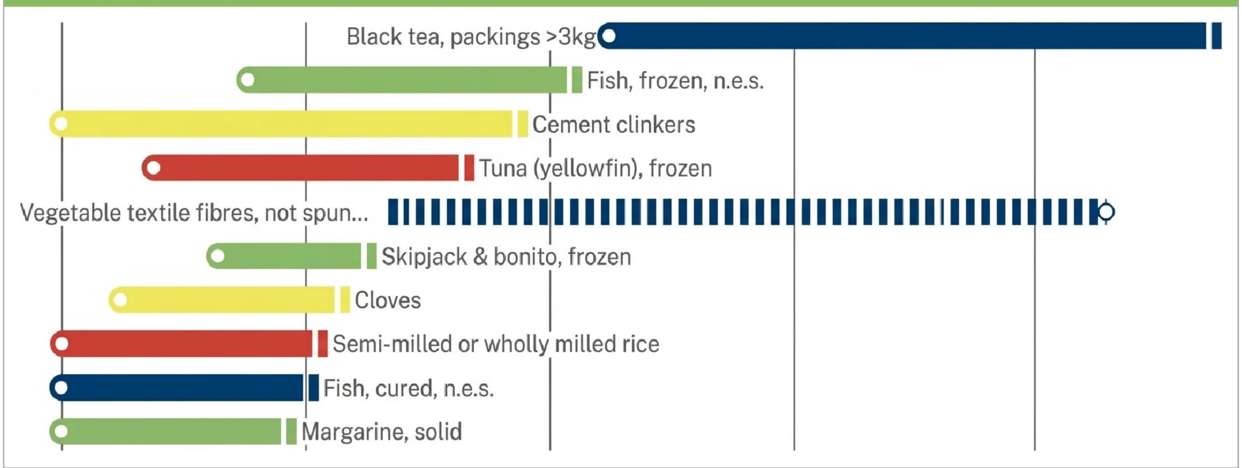
## EAC-ECOWAS Export Potential

International Trade Centre (ITC) methodology shows large untapped trade potential between the two regional communities in terms of products (Figure 15). Overall, Eastern Africa has an export potential of $203 million to Western Africa for all products, of which $158 million remains unrealized. The subsector with the greatest export potential from Eastern Africa to Western Africa are Fish & shellfish, Tea & mate, and Mineral products. Fish & shellfish shows the largest absolute difference between potential and baseline exports in value terms, leaving room to realize additional exports worth $21 million, representing 13% of unrealized export potential.

The specific products with greatest export potential from Eastern Africa to Western Africa are Black tea, packings >3kg, Fish, frozen, n.e.s., and Cement clinkers. Black tea, packings >3kg shows the largest absolute difference between potential and baseline exports in value terms, leaving room to realize additional exports worth $12 million, representing 7.7% of unrealized export potential.

On the other hand, Western Africa has an estimated export potential of $332 million to Eastern Africa across all products, of which USD 169 million remains unrealized. The subsector with the greatest export potentials from Western Africa to Eastern Africa are Precious metals, Vegetable oils & fats, and Fertilisers. Precious metals show the largest absolute difference between potential and baseline exports in terms of value, leaving room to realize additional exports worth $66 million, representing 39% of unrealized export potential. The products with the greatest export potential from Western Africa to Eastern Africa are Gold, unwrought, for non-monetary purposes, Palm oil, crude and Urea.

FIGURE 15: EAC EXPORT TO ECOWAS POTENTIAL BY PRODUCT (ESTIMATE FOR 2029)

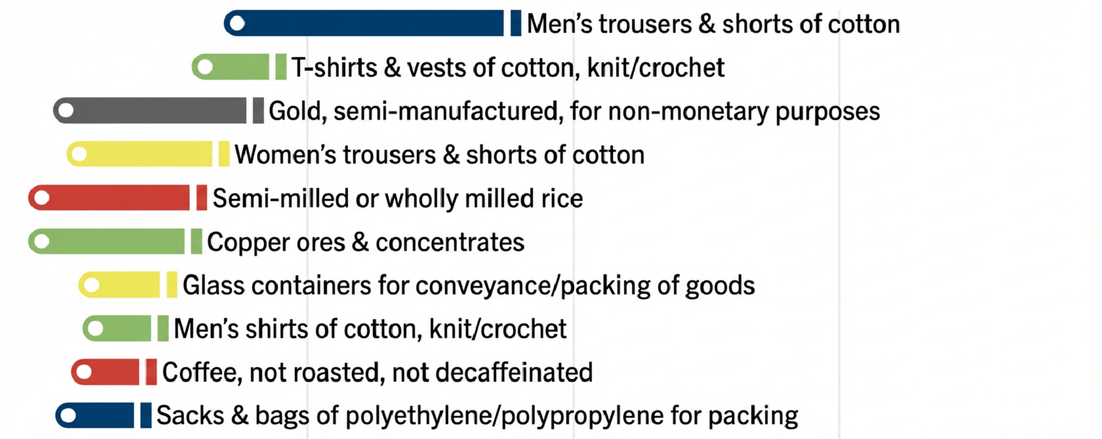



Source ITC Export Potential

## EAC-SADC Export Potential

The export potential from Eastern Africa to Southern Africa is estimated at approximately $2 billion across all products. However, a significant portion of this about $1.5 billion remains unrealized according to ITC Trade Potential, highlighting substantial untapped trade opportunities between the two regions. The products with greatest export potential from Eastern Africa to Southern Africa are Apparel, Precious metals, and Chemicals (Figure 16). Apparel shows the largest absolute difference between potential and baseline exports in value terms, leaving room to realize additional exports worth $324 million, representing 22% of unrealized export potential. The specific products with greatest potential are Men's trousers & shorts of cotton, T-shirts & vests of cotton, knit/crochet, and Gold, semi-manufactured, for non-monetary purposes. Men's trousers & shorts of cotton shows the largest absolute difference between potential and baseline exports in value terms, leaving room to realize additional exports worth $99 million, representing 6.6% of unrealized export potential.

**FIGURE 16: EAC EXPORT TO SADC POTENTIAL BY PRODUCT (ESTIMATE FOR 2029)**




Source ITC Export Potential

The export potential from Southern Africa to Eastern Africa is valued at about $4 billion across all products. Of this, nearly $2.4 billion remains unrealized, pointing to considerable opportunities for expanding trade flows between the two regions. The products with greatest export potential from Southern Africa to Eastern Africa are Motor vehicles & parts, Beauty products and perfumes, and Sugar. Motor vehicles and parts shows the largest absolute difference between potential and baseline exports in value terms, leaving room to realize additional exports worth $307 million, representing 13% of unrealized export potential. The specific products with greatest export potential are Motor vehicles for the transport of goods, Mixtures of odoriferous substances used in food & drink, and Cane sugar, raw. Motor vehicles for the transport of goods shows the largest absolute difference between potential and baseline exports in value terms, leaving room to realize additional exports worth $152 million, representing 6.2% of unrealized export potential.

# Key Non-Tariff Barriers hindering EAC trading with other Regional Blocs

The trade flows between the EAC and the regional blocs remain relatively limited, largely due to geographical distance, poor connectivity, non-tariff barriers (NTBs), lack of harmonised regulations, low levels of industrialization and product diversification in both regions. In particular, limited transport infrastructure, fragmented border procedures and inconsistent standards continue to weaken supply chain efficiency and competitiveness, thereby restricting the full realization of trade potential under the Tripartite Free Trade Area (TFTA) and African Continental Free Trade Agreement (AfCFTA) frameworks. These factors collectively constrain market access and increase the cost of doing business across the two blocs.

The main NTBs reported through the AfCFTA NTBs Reporting, Monitoring and Eliminating Mechanism that affect EAC member states trade with ECOWAS and SADC countries include challenges related to customs classification, technical regulations and standards (including packaging, labelling, and marking requirements), restrictive trade practices, customs valuation, and conformity assessments (Table 3). Additionally, evidence from the Tripartite NTBs Online and SMS Reporting System points to the persistence of sanitary and phytosanitary (SPS) measures as further impediments.

In the ECOWAS region, along the Abidjan–Lagos Corridor major trade barriers include several customs clearances (each border), high frequency of police stops (average 3–5 stops per 100 km), bribery and inconsistent documentation across borders, multilingual- alternating anglophone (Nigeria and Ghana) and francophone countries (Benin, Togo, and Ivory Coast), systems and processes not well harmonized, no cross-border connectivity, Security concern and lack of Corridor wide approach such as corridor oversight organisation.

Along the Northern Corridor of the EAC the key trade barriers include congestion at Port of Mombasa (4–7 days dwell time), border delays at Malaba & Busia (Kenya–Uganda) due to system downtime, limited parking for trucks, multiple (24) police check points between Mombasa-Busia/Malaba borders, informal checkpoints in Uganda/DRC, delays at weighbridges in Kenya and inadequate road infrastructure along the corridor (e.g. Mai Mahiu in Kenya and DRC roads) while key trade barriers along central corridor include Infrastructure gaps between Dar es Salaam–Kigoma–Bujumbura , border delays at Rusumo (Tanzania–Rwanda) and Kobero (Tanzania–Burundi) and axle load enforcement inconsistency.

| TABLE 3: ACTIVE REPORTED NTBS IN THE AFCFTA NTB REPORTING TOOL (MAY 2025) | | | | | |
|---|---|---|---|---|---|
| NTB ID | NTB Type | Issue Description | Location | Reporting Country | Sector/ Product |
| AFCFTA-000-093 | Customs Classification | Rejection of certificate of origin and failure to provide a clear tariff ruling | Tanzania | Ghana | Glass fiber reinforced polymer bar |
| AFCFTA-000-088 | Technical regulations and standards including packaging, labelling and marking requirements | Tanzania requires annual renewal of product test reports for safety footware | Tanzania | South Africa | Safety personal protective equipment |
| AFCFTA-000-065 | Restrictive practices tolerated by governments | Kenya imposed a transit fee of foreign trucks | Kenya | | All foreign trucks |
| AFCFTA-000-084 | Customs Valuation | Ghana imposed delays and inflated freight valuations on AFCFTA food imports from Rwanda leading to excess storage fees and penalties | Ghana | Rwanda | Coffee, Tea, Honey, Avocado Oil |
| AFCFTA-000-066 | Conformity Assessments | Nigeria mandated COTECNA inspections for sisal fibres, despite existing certifications from Tanzania Sisal Board | Nigeria | Tanzania | Sisal fibres |
| AFCFTA-000-067 | Other | A new bill of exchange requirement by Ghanas National Investment Bank delays sisal fibre payments by upto 63 days and increases transaction costs | Ghana | Tanzania | Sisal fibre |

Source: AFCFTA NTBs Reporting Tool

# Prospects for EAC Trade Growth with the Regional Blocs

The analysis of EAC with ECOWAS and SADC trade trends in goods shows that EAC have made notable strides in fostering regional integration underpinned by deliberate policy and programme interventions both in the regional blocs and between the blocs like the EAC's Common Market commitments, ECOWAS's free movement protocols and SADC's trade protocol and industrialization strategy, Tripartite NTB Monitoring & Elimination Mechanism / Trade Facilitation cooperation and Tripartite Free Trade Area (TFTA).

The prospects for EAC trade growth with other regional blocs are strong, attributed to the rising populations, expanding middle classes, and diverse resources between the regions. Demand for food, manufactured goods, energy, and services is projected to grow rapidly, creating opportunities for EAC exporters in agro-processing, tea, coffee, fish, and horticulture, while ECOWAS can export petroleum products, cocoa, cashew, and palm-based products to EAC.

Policy frameworks such as the AfCFTA and TFTA, combined with ongoing efforts on customs reforms, elimination of NTBs and harmonization of standards are expected to reduce barriers and have more potential trade that can take place between these RECs. According to World Bank, AfCFTA has the potential to increase intra-African trade by 15% by 2035 upon full implementation. This highlights the potential of regional blocs.

In addition, major infrastructure projects, including the Abidjan–Lagos Corridor and EAC transport corridor networks, alongside improved maritime and digital connectivity, will further strengthen trade flows and reduce costs. Abidjan-Lagos corridor and connectivity to other corridors in central and East Africa, has the potential to improve ECOWAS inter and intra -regional trade through connecting urban hub and easing the movement of goods and people. The corridor has the potential to boost intra-regional trade from its current 12%-15% to 40% and is anticipated to alleviate the 72-hour delays that truckers currently face, provide attraction to investments and drive export diversification beyond commodities. Furthermore, SADC together with other regional blocs have introduced Regional North–South Trade Corridor that will connect several countries and eliminate cross-border barriers to promote trade and economic growth.


While EAC, ECOWAS and SADC has made significant strides towards regional integration, challenges such as infrastructural gaps, high transport costs, non-tariff barriers, and security risks persist. Nonetheless, the overall outlook remains positive, with growing prospects for more formalized, and higher-value trade flows. There is potential for intra-Africa trade to expand significantly over the next decade if enabling reforms and connectivity initiatives are sustained.

# TMA Interventions and Recommendations

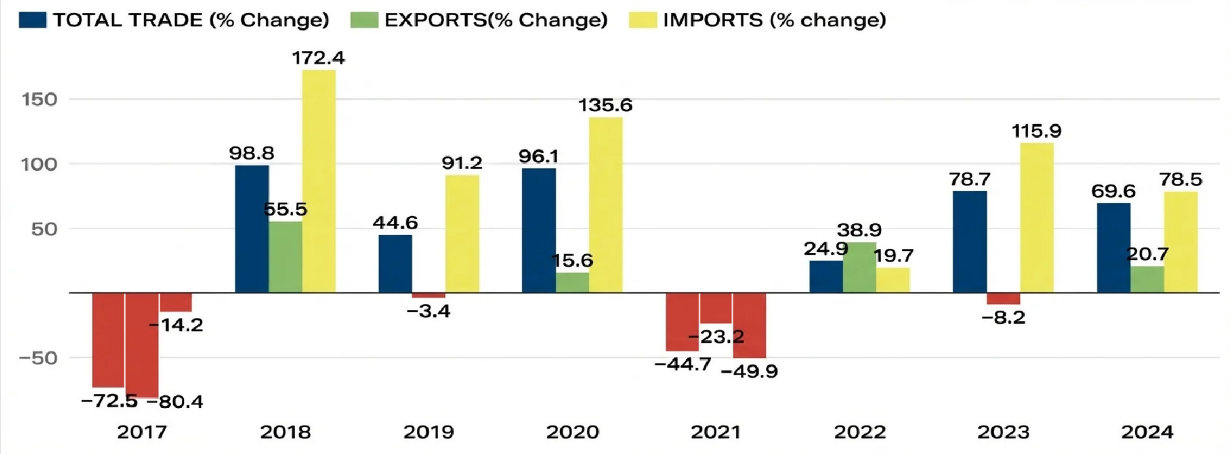
TMA is currently focusing on initiatives aimed at increasing trade flows in both directions between EAC and other RECs using integrated corridor and border management approach. In West Africa, TMA is working to enhance trade between EAC and ECOWAS broadly in areas including information exchange between customs authorities in the two blocs, customs integration into SIGMAT the transit good management system, NTB reporting and resolution mechanism of ECOWAS, CECOWAS Certificate of Origin and Regional Single Territory Regime framework among others.

## Recommendations for scaling up TMA impact include:

1. Integration of NTB alerts into the platforms farmers already use like Isoko, agri-wallets, digital extension tools, and market systems to enhance accessibility and responsiveness.
2. Integrating digital trade platforms like iSoko into EAC–SADC trade promotion frameworks to boost regional uptake
3. Incorporating gender considerations into NTB reporting mechanisms, recognizing that certain NTBs disproportionately affect women and youth traders.
4. Organizing regular buyer–seller missions and B2B networking events between EAC and ECOWAS and SADC member states
5. Supporting services trade liberalization to complement goods trade for instance by developing regional mutual recognition frameworks for professional qualifications, financial services and movement of natural persons.
6. Encouraging uniform adoption of advanced digital tools such as blockchain and AI-driven risk management systems across Customs and trade agencies.
7. Border post harmonization and integrated One-Stop Border Posts (OSBPs) on key tripartite corridors including significant reduction of the present border agencies, digitalizing and connecting their various systems.
8. Creating awareness to traders on NTB reporting and elimination monitoring mechanism, strengthening private sector bilateral engagements as well as inter-government engagements at top political leadership level will enhance resolution of long standing trade barriers among the RECs.
9. Strengthening development, digitalization and implementation of behind the borders measures to ensure seamless flow of goods along the corridors and no stop borders. Implementation of authorization economic operators' scheme and full automation of customs processes is key to this effect.
10. Operationalizing tripartite FTA especially between EAC and Southern African Customs Union (SACU) will be critical in optimizing the export potential between EAC and SADC while full implementation of the AfCFTA and strengthening inter- REC linkages will unlock the potential between EAC and ECOWAS.

# Annex Figures and Tables

FIGURE 1: EAC -ECOWAS CHANGE IN TOTAL TRADE, EXPORTS AND IMPORTS (PERCENT)




Source: ITC Trademap

TABLE 1: EAC QUARTERLY TOTAL TRADE BY REGION/ECONOMIC BLOCS

| | 2023Q1 | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2025Q1 | Q to Q % changes | |
|---|---|---|---|---|---|---|---|---|
| | | | | | | | 2024Q4 | 2025Q1 |
| WORLD | 25824.2 | 28103.2 | 29708.8 | 32877.3 | 33888.7 | 34532.9 | 9% | 23% |
| Africa | 5863.5 | 6164.5 | 6552.4 | 7600.7 | 7794 | 9485 | 5% | 54% |
| % share of world | 22.7 | 21.9 | 22.1 | 23.1 | 23 | 27.5 | | |
| EAC | 3430.7 | 3410.7 | 3696.7 | 4146.8 | 3932.8 | 5239 | -1% | 54% |
| % share of world | 13.3 | 12.1 | 12.4 | 12.6 | 11.6 | 15.2 | | |
| COMESA | 3073.3 | 2616.5 | 2812.8 | 3266.5 | 3077.9 | 4556 | -15% | 74% |
| % share of world | 11.9 | 9.3 | 9.5 | 9.9 | 9.1 | 13.2 | | |
| SADC | 3043.5 | 3727.1 | 3680.9 | 4323.2 | 4931.6 | 5958.9 | 22% | 60% |
| % share of world | 11.8 | 13.3 | 12.4 | 13.1 | 14.6 | 17.3 | | |
| European Union All Countries | 2086.8 | 2272.3 | 2297.1 | 2503.2 | 2557.5 | 2372.5 | 9% | 4% |
| % share of world | 8.1 | 8.1 | 7.7 | 7.6 | 7.5 | 6.9 | | |
| ASEAN | 1752.9 | 1870.2 | 1562.8 | 1429.5 | 1534.8 | 2084 | 7% | 11% |
| % share of world | 6.8 | 6.7 | 5.3 | 4.3 | 4.5 | 6 | | |
| ECOWAS | 136.8 | 190 | 340.4 | 450.3 | 414.4 | 445.1 | 39% | 134% |
| % share of world | 0.5 | 0.7 | 1.1 | 1.4 | 1.2 | 1.3 | | |

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| TABLE 2: EAC-ECOWAS TOP DESTINATION IMPORTS AND EXPORTS | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **List of supplying markets from ECOWAS for products imported by EAC (US Million)** | | | | | | **List of importing markets from ECOWAS for products exported by EAC (US Million)** | | | | | |
| | 2020 | 2021 | 2022 | 2023 | 2024 | | 2020 | 2021 | 2022 | 2023 | 2024 |
| **Burkina Faso** | 250.6 | 84.1 | 0.1 | 109.9 | 444.8 | **Nigeria** | 135.7 | 102.3 | 143.0 | 154.4 | 152.7 |
| **Mali** | 1.1 | 1.6 | 1.1 | 73.8 | 361.3 | **Ghana** | 51.5 | 46.3 | 65.1 | 67.2 | 84.2 |
| **Ghana** | 3.7 | 10.4 | 11.5 | 247.2 | 227.9 | **Côte d'Ivoire** | 30.4 | 17.2 | 24.6 | 15.1 | 17.9 |
| **Côte d'Ivoire** | 4.8 | 34.1 | 85.8 | 249.4 | 53.0 | **Senegal** | 19.5 | 13.0 | 16.5 | 29.8 | 11.1 |
| **Liberia** | 0.9 | 1.2 | 167.7 | 41.9 | 11.2 | **Burkina Faso** | 8.2 | 7.3 | 15.4 | 15.1 | 9.0 |
| **Nigeria** | 9.6 | 14.8 | 15.6 | 62.1 | 7.1 | **Sierra Leone** | 2.4 | 2.2 | 4.6 | 3.7 | 5.3 |
| **Senegal** | 30.2 | 3.4 | 2.7 | 2.4 | 5.2 | **Togo** | 4.0 | 3.5 | 0.7 | 2.4 | 5.0 |
| **Togo** | 13.3 | 58.5 | 280.0 | 169.9 | 2.2 | **Guinea** | 13.3 | 2.2 | 1.5 | 7.6 | 4.1 |
| **Benin** | 0.9 | 1.2 | 1.2 | 0.8 | 1.4 | **Gambia** | 1.3 | 1.9 | 1.7 | 1.9 | 3.5 |
| **Niger** | 11.0 | 0.9 | 1.3 | 1.6 | 0.5 | **Liberia** | 0.2 | 0.7 | 1.3 | 1.6 | 2.7 |
| **Sierra Leone** | 0.3 | 0.6 | 0.9 | 0.6 | 0.5 | **Mali** | 0.2 | 0.6 | 0.5 | 1.8 | 2.6 |
| **Guinea** | 0.1 | 0.1 | 0.4 | 0.7 | 0.2 | **Benin** | 2.1 | 4.1 | 5.6 | 2.1 | 2.3 |
| **Gambia** | 212.9 | 144.2 | 0.4 | 0.0 | 0.0 | **Niger** | 0.8 | 1.7 | 0.9 | 2.4 | 2.0 |
| **Cabo Verde** | 0.2 | 0.0 | 0.7 | 0.1 | 0.0 | **Cabo Verde** | 1.5 | 1.2 | 4.1 | 3.0 | 1.8 |
| **Guinea-Bissau** | 5.5 | 0.2 | 0.1 | 0.1 | 0.0 | **Guinea-Bissau** | 0.3 | 0.3 | 0.7 | 0.3 | 0.6 |

Source ITC Export Potential

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