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Trade Facilitation in Southern Africa, 2015–2025

Trends, binding constraints and priority actions for bridging Eastern and Southern Africa

Issues paper extracted from the ECA SRO-SA study "The State of Regional Integration in Southern Africa: Trends in Trade and Transport Facilitation" (Draft Report, October 2026). Prepared by Lovemore Bingandadi, International Consultant, for the ECA Sub-Regional Office for Southern Africa. The views expressed are those of the author and do not necessarily reflect those of ECA or its Member States.

Key messages

- **Regional trade grew; its share did not.** Between 2015 and 2024 the eleven SRO-SA Member States ratified the WTO Trade Facilitation Agreement, brought the Tripartite Free Trade Area into force and commissioned One-Stop Border Posts. Intra-SADC trade grew 24.5 per cent, but extra-regional trade, inflated by higher commodity prices and a weaker rand, grew 48.4 per cent, so the intra-SADC share of merchandise trade fell from 22.0 to 19.1 per cent. The share tracks commodity cycles at least as closely as integration; on its own it cannot show whether reform worked.
- **Notification is not performance.** Notified TFA implementation has a median of 90.3 per cent, but the only authoritative corridor measurement puts Durban–Kasumbalesa at 15 days and 21 hours, with the Beitbridge and Chirundu One-Stop Border Posts themselves identified as bottlenecks.
- **The transport half of trade facilitation is unfinished.** More than one in five (21.5 per cent) of the 967 complaints on the Tripartite non-tariff barrier register are transport-related. The Tripartite FTA entered into force in July 2024; the Vehicle Load Management Agreement and the Multilateral Cross-Border Road Transport Agreement have awaited Heads of State signature since March 2023.
- **The region does not yet have a comprehensive view of its own performance.** The Logistics Performance Index covers six of eleven Member States and has been discontinued in its comparable form; headline informal-trade figures date from 2010.
- **Three benchmarks, one diagnosis.** The WTO TFA Database, the UN Global Survey 2025 and the OECD Trade Facilitation Indicators 2025 all show implementation rising and legal reforms running ahead of practice; none measures corridor time or the transport dimension.
- **Facilitation is necessary but not sufficient.** Commodity-heavy trade and manufacturing value added of 11–12 per cent of GDP cap what procedural reform alone can deliver. South Africa's slow growth and power shortages, droughts and cyclones, conflict and shifting access to Asian and US markets also shaped regional trade, independently of border procedures.
- **Services are the unmeasured half of integration.** Transport, logistics, insurance and payment services are where facilitation is delivered, yet regional monitoring covers merchandise only. The SADC Protocol on Trade in Services has been in force since January 2022 and the SADC-RTGS settled ZAR 272 billion in July 2026 alone, but no regional series tracks services trade.
- **The bridge already exists.** The Tripartite FTA, the Tripartite NTB mechanism and the Tripartite transport instruments span both sub-regions. Three actions could be implemented within twelve months, largely from existing budgets though not at zero cost (Table 5): sign the transport instruments, align One-Stop Border Post commercial hours with passenger hours, and publish national plans for the 2026–27 TFA commitment deadlines.

1 Purpose and scope

This paper informs Session 5 of the Joint ICSOE. It distils, for a policy audience, the trade facilitation findings of the ECA SRO-SA study on regional integration in Southern Africa. The concept note for the meeting asks how the two sub-regions can reduce trade costs, improve corridor performance and use the entry into force of the COMESA-EAC-SADC Tripartite Free Trade Area (TFTA) as a practical bridge. Southern Africa's experience over the past decade answers a prior question: what trade facilitation reform has and has not delivered, and why.

The evidence, which is preliminary and based on desk research, covers the eleven SRO-SA Member States — Angola, Botswana, Eswatini, Lesotho, Malawi, Mauritius, Mozambique, Namibia, South Africa, Zambia and Zimbabwe — over 2015–2025, across SADC, COMESA and SACU. It draws on the SADC Merchandise Trade Statistics Bulletin (April 2026), the WTO TFA Database, ITC Trade Map export data, the Tripartite online NTB mechanism, the World Bank Logistics Performance Index and the 2025 SADC North-South Corridor Time Release Study. Merchandise data dominate because no regional series on services trade exists as yet; section 3.8 sets out what is known. Two conventions apply. A **trend** is a sustained, directional change across at least three observation points; a **pattern** is a structural feature visible in any single year. And trade facilitation is assessed together with its transport dimension, because ten of the eleven Member States either depend on transit through a neighbour or are the neighbour through which others transit. For them, a customs delay and a weighbridge queue are the same cost (Table 1).

Table 1 Institutional membership and transit status of the eleven SRO-SA Member States

Member State	SADC	COMESA	SACU	Transit status	Principal corridor orientation
Angola	✓			Coastal	Lobito
Botswana	✓		✓	Land-linked	Trans-Kalahari; North-South
Eswatini	✓	✓	✓	Land-linked	Maputo; Durban
Lesotho	✓		✓	Land-linked	Durban
Malawi	✓	✓		Land-linked	Nacala; Beira; North-South; Central (Dar es Salaam)
Mauritius	✓	✓		Island	Maritime — Port Louis
Mozambique	✓			Coastal; transit anchor	Maputo; Beira; Nacala
Namibia	✓		✓	Coastal; transit anchor	Walvis Bay corridor cluster
South Africa	✓		✓	Coastal; transit anchor	North-South; Durban; Cape Town
Zambia	✓	✓		Land-linked	North-South; Nacala; Central (Dar es Salaam); Walvis Bay–Ndola–Lubumbashi; Lobito
Zimbabwe	✓	✓		Land-linked	North-South; Beira; Maputo

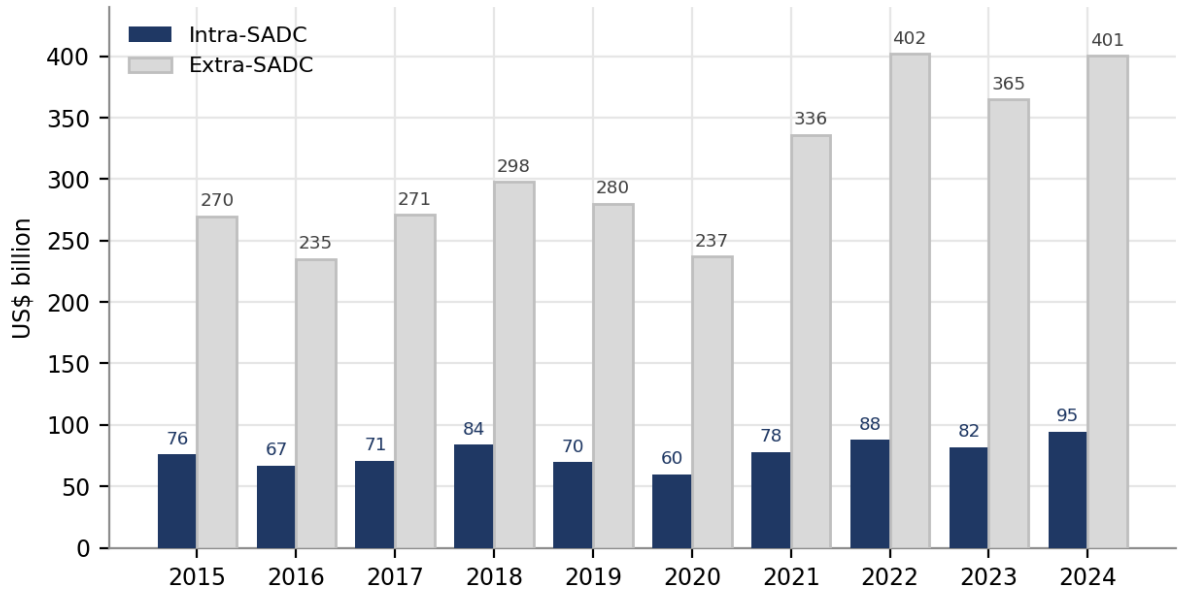
Source: SADC, COMESA and SACU Secretariat membership records. Eswatini alone belongs to all three; five Member States are also in COMESA and so sit inside the Tripartite bridge to the EAC.

2 The decade in brief: reform delivered, integration unproven

SADC's total merchandise trade rose from US$345.8 billion in 2015 to US$495.1 billion in 2024. Intra-SADC trade rose from US$75.9 billion to US$94.6 billion, but extra-SADC trade rose almost twice as fast, from

US$269.8 billion to US$400.6 billion (Figure 1). The region did not trade less with itself; it traded relatively less with itself.

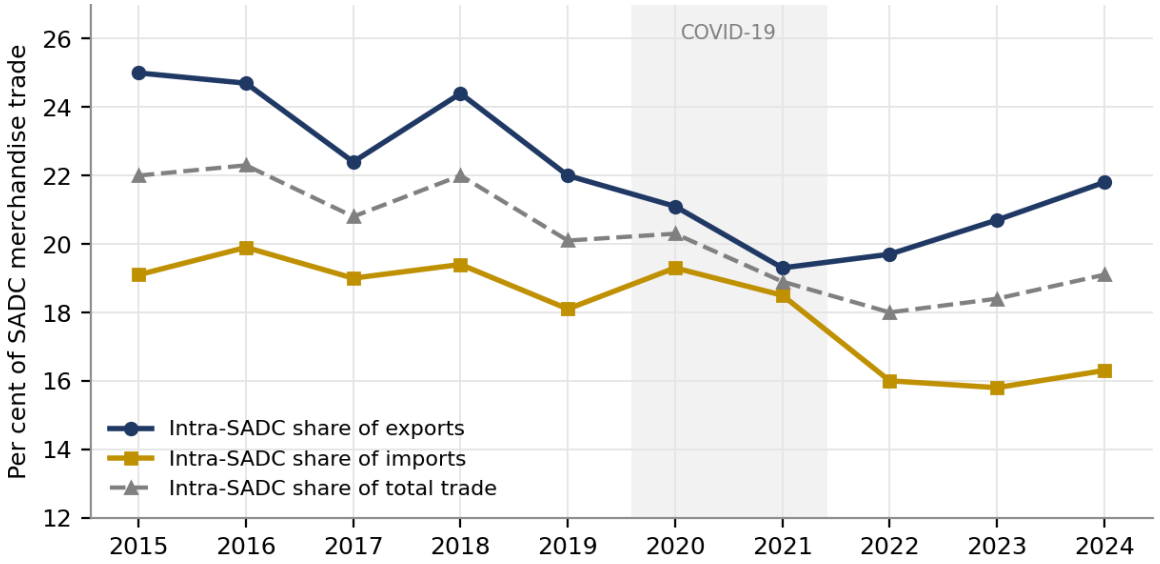
Figure 1 Intra- and extra-SADC merchandise trade, 2015–2024 (US$ billion)



Source: SADC Merchandise Trade Statistics Bulletin, April 2026, Tables 12 and 17. Current US dollars. Intermediate-year extra-SADC values rounded to the nearest billion.

The intra-regional share of total trade fell from 22.0 to 19.1 per cent; the export share from 25.0 to 21.8 per cent and the import share from 19.1 to 16.3 per cent (Figure 2). The decline was under way before COVID-19 and survives the exclusion of the 2020–2022 shocks. Most of it is a denominator effect. Had extra-regional trade stayed at its 2015 value, the growth of intra-SADC trade alone would have lifted the share by about 4 percentage points, to 26.0 per cent; faster extra-regional growth took off about 7 points. That growth was led by commodity exports to Asia, principally China — notably DRC copper and cobalt and Angolan crude — and by prices. The 2015 and 2024 endpoints do not sit at comparable points in the commodity cycle: Brent crude averaged about US$52 a barrel in 2015 and US$80 in 2024, gold roughly doubled and copper rose by about two-thirds. Exchange rates compounded the effect: much intra-regional trade is invoiced in rand, which lost about 30 per cent of its dollar value between the two years, while commodity exports are priced in dollars. An earlier Secretariat series places the early years higher but records the same downward direction.

Figure 2 Intra-SADC trade shares, 2015–2024 (per cent)



Source: SADC Merchandise Trade Statistics Bulletin, April 2026, Tables 9, 11 and 13.

Independent ITC export data confirm this reading. The intra-SADC export share fell from 25.0 per cent in 2016 to 18.8 per cent at the 2022 commodity peak and recovered to 22.2 per cent in 2024, when intra-SADC exports reached a series high of US$54 billion. Over 2016–2024 the share moved inversely with extra-regional exports and showed almost no relationship with the value of regional exports. Across the eleven study States it has moved between about 19 and 23 per cent with no sustained direction. The regional share is therefore a commodity-sensitive structural pattern, not a trend, and cannot by itself be used to judge whether facilitation reforms worked (Simons, 2026). Whether integration is deepening has to be read from what regional trade consists of, how it is financed and whether traders use the preferences on offer.

Three structural patterns frame everything that follows. First, the region trades predominantly outside itself: extra-regional trade exceeded 80 per cent of the total throughout the window. Second, intra-regional trade is a hub-and-spoke system: South Africa supplied US$30.4 billion of US$55.4 billion of intra-SADC exports in 2024 and ran a regional surplus of US$21.8 billion, against deficits for eight of the other ten Member States. Its share of intra-SADC exports rose from 48.7 to 54.9 per cent on the governing series, although the earlier series shows this share easing — both place it near 55 per cent today. Third, dependence on regional trade is bimodal, from 3.6 per cent of Angola's trade, whose crude is shipped mainly to Asia, to 73.4 per cent of Eswatini's. Much of the high-dependence cluster reflects the SACU customs union rather than facilitation reform. Lower border and transport costs benefit every supplier, so facilitation alone does not change this hub-and-spoke structure; it may even reinforce it, because the most competitive supplier, South Africa, gains most from cheaper access to every market.

Facilitation is also only one of several forces acting on regional trade, and the study cannot separate their effects. South Africa, the hub, grew by less than 1 per cent a year on average over 2015–2024, and its electricity shortages, most severe in 2023, constrained the output it supplies to the region; Zambia and Zimbabwe lost hydropower when the 2024 drought drew down Lake Kariba. The El Niño droughts of 2015–16 and 2023–24, the second of which led SADC to declare a regional disaster, and Cyclones Idai (2019) and Freddy (2023) disrupted the maize, sugar and transport flows on which regional trade depends, and prompted food export bans. Insurgency in Cabo Delgado and conflict in the eastern DRC interrupted specific corridors. External market access is also shifting: China extended zero-tariff treatment to the 53 African countries with which it has diplomatic relations (all SRO-SA States except Eswatini) from May 2026, and the United States imposed reciprocal tariffs in 2025 and let AGOA lapse in September 2025 before extending it,

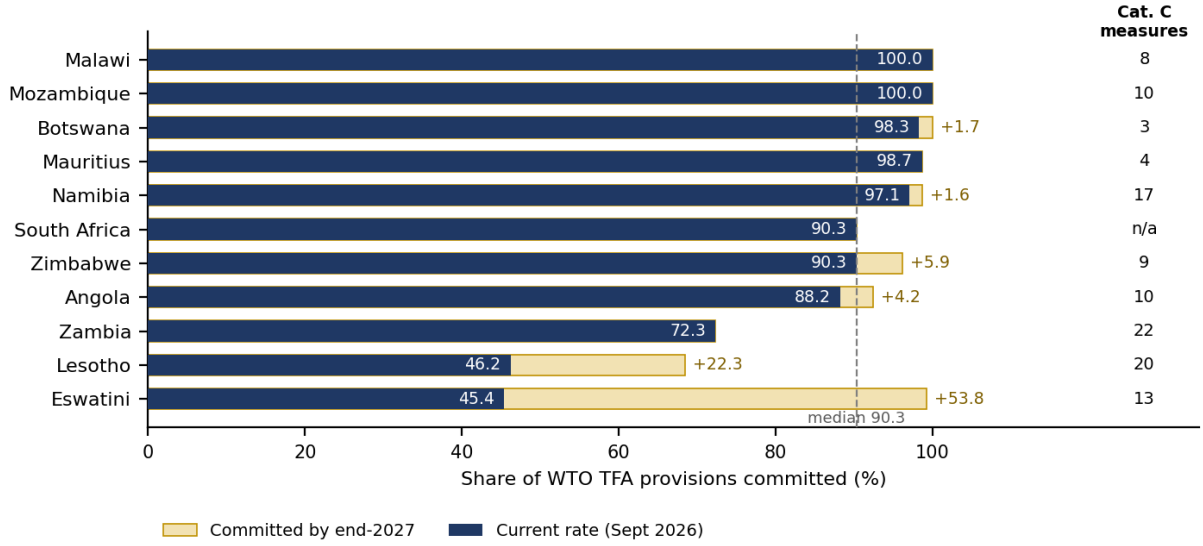
in 2026, to December 2028. These developments are explanatory hypotheses alongside facilitation, not measured effects.

3 Trends in trade facilitation, 2015–2025

3.1 TFA commitments: high, dispersed and back-loaded

All eleven Member States have ratified the WTO TFA. Their current implementation-commitment rates range from 45.4 per cent (Eswatini) to 100 per cent (Malawi and Mozambique), around a median of 90.3 per cent (Figure 3). The dispersion is not explained by income, ratification date or coastal status; the strongest predictor is the number of measures placed in Category C, which depends on technical assistance. For a land-linked exporter, the relevant number is not the regional average but the weakest link on the route.

Figure 3 WTO TFA implementation commitments, current and by end-2027 (per cent)



Source: WTO Trade Facilitation Agreement Database, member profiles, retrieved 14 September 2026. South Africa notified Category A and B measures only.

Two features matter for policy. First, a **commitment cliff**: Eswatini's rate is scheduled to rise 53.8 percentage points by end-2027 and Lesotho's 22.3, so a large block of obligations falls due inside fifteen months. Zambia has already lodged 16 requests to extend implementation dates and Namibia 35. Second, schedules run far beyond the window: South Africa has notified February 2038 for operation of its single window, and Zambia's terminal date is also 2038. Rising notified compliance qualifies as a trend at the policy and legal layer; improvement in actual clearance performance does not, because the region has too few repeated, comparable measurements to establish direction.

3.2 Digitalization: the strongest positive trend

Digitalization is the decade's clearest positive trend in trade facilitation. Automated customs systems operate across the region; single windows operated in Mozambique, Eswatini and Malawi within the window, and in Mauritius from February 2026. The SADC electronic Certificate of Origin framework and the Tripartite Corridor Trip Monitoring System (CTMS) moved from concept to operation. COVID-19 was the decade's **dual signal**: its border closures were the worst facilitation failure of the window, yet CTMS, the regional standard operating procedures for moving goods and much of the e-CoO momentum were created as emergency responses and survived the emergency. The region's capacity to implement quickly is far higher than its normal tempo suggests; what is usually missing is an enforcement mechanism. Adoption is, however, bifurcating: half the region has operating single windows, and the other half has scheduled them for 2027 to 2038.

3.3 One-Stop Border Posts: institutional form ahead of performance

The One-Stop Border Post programme is the region's flagship facilitation intervention, and the clearest illustration of the gap between form and performance (Table 2). The SADC Time Release Study for the North-South Corridor, launched in February 2025, put average clearance and transit time from Durban to Kasumbalesa at **15 days, 21 hours and 5 minutes**. It identified Beitbridge and Chirundu as bottlenecks — and Chirundu has been an OSBP since 2009.

Table 2 Selected One-Stop Border Posts: commissioning and recorded operating status

Border post	Partners / corridor	Status	Recorded operating condition
Chirundu	Zambia–Zimbabwe; North-South	OSBP since Dec 2009	Extended to 24 hours; named as a bottleneck in the 2025 Time Release Study
Kazungula	Botswana–Zambia; North-South	May 2021	US$259 million bridge and OSBP replacing the Zambezi ferry
Mwami/Mchinji	Zambia–Malawi; Nacala	Dec 2022	24/7 for passengers, **12 hours a day for commercial goods** (SADC, Oct 2024)
Dedza/Calomue	Malawi–Mozambique; Nacala	Jun 2025	15 hours a day, about 80 trucks a day; Mozambican side in legacy buildings
Trans-Kalahari/Mamuno	Namibia–Botswana; Trans-Kalahari	Pilot, Sep 2024	Pilot OSBP under NamRA and BURS; permanent Mamuno facility pending
Beitbridge	South Africa–Zimbabwe; North-South	Upgrading	Busiest inland crossing; **12 hours a day for commercial goods** (SADC, Jul 2025); named as a bottleneck

Sources: SADC Secretariat border post assessments and commissioning releases; SADC North-South Corridor Time Release Study (February 2025). No consolidated public register of OSBP operating status exists.

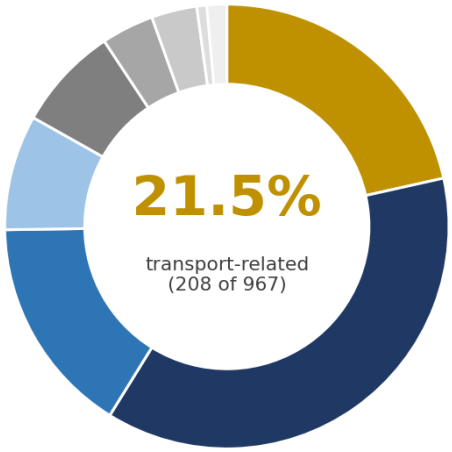
The lesson is not that OSBPs fail but that infrastructure has been delivered without the operational integration it was meant to produce. A capital-intensive facility whose commercial window is twelve hours cannot deliver the transit-time reduction its business case assumed. On the corridor that carries most of the region's transit freight, the **commercial operating window, not the building,** is a constraint the OSBP debate has largely overlooked. Many crossings remain colonial-era facilities designed to control a frontier rather than move freight. Capital investment should therefore be rebalanced with operational measures — operating hours, coordinated border management and the transport regulatory interface — rather than either abandoned or defaulted to the OSBP template.

3.4 Non-tariff barriers: what traders actually report

The Tripartite online NTB mechanism, operated jointly by COMESA, the EAC and SADC, is the only continuously maintained public register of what traders, transporters and officials complain about. By 14 September 2026 it recorded 960 complaints with 871 resolved, a 90.7 per cent headline resolution rate (the

published category register sums to 967). Its composition is more revealing than its resolution rate (Figure 4).

Figure 4 Composition of Tripartite NTB complaints by group



Complaint group	No.	%
Transport-related (cat. 8, 2.9, 7.9)	**208**	**21.5**
Customs and administrative entry (cat. 2, excl. 2.9)	361	37.3
Government participation in trade (cat. 1)	154	15.9
Other procedural problems (cat. 7, excl. 7.9)	81	8.4
Specific limitations (cat. 5)	73	7.5
Charges on imports (cat. 6)	37	3.8
Technical barriers to trade (cat. 3)	32	3.3
SPS measures (cat. 4)	7	0.7
Uncategorised	14	1.4
Total (category register)	**967**	**100.0**

Source: consultant's analysis of the Tripartite NTB mechanism category register (tradebarriers.org), 14 September 2026. Transport-related = all of category 8 plus 2.9 (transit fees) and 7.9 (inadequate trade-related infrastructure). Percentages of 967; may not sum to 100 because of rounding.

- **Rules of origin are the largest single friction:** 112 complaints, 34 more than the next category. These complaints arise mainly under the SADC and COMESA origin regimes, which run concurrently for the five Member States in both; AfCFTA and TFTA preferences are still little used, and SACU requires no proof of origin for goods circulating within the customs union. Because the register does not record which regime a consignment claimed, the region cannot yet measure preference utilization. A high resolution rate (105 of 112) marks these as recurring procedural disputes — exactly what harmonization should eliminate.
- **Transport barriers are the second cluster:** transit issues (58) and road user charges and fees (51) are the fourth- and fifth-largest categories in the register. Together with vehicle standards, transport regulation, border hours and transit fees, transport-related complaints total 208, or 21.5 per cent. Because a single delay may be logged under several headings, this share is a floor.
- **The mechanism works where resolution is free and fails where it costs revenue:** procedural customs complaints resolve at or near 100 per cent, but "additional taxes and other charges" resolves at 66.7 per cent and holds 21 of the 96 unresolved complaints.

3.5 An asymmetric legal architecture

The trade pillar advanced. The TFTA, signed in 2015, entered into force on 25 July 2024; AfCFTA trading began in 2021 and 49 of 54 AU members had ratified by January 2026. Yet the REC trade facilitation annexes remain thinner than the WTO TFA and AfCFTA Annex 4: advance rulings, appeal procedures and the single window enter the region's binding law through the multilateral and continental instruments, not through any REC instrument.

The transport pillar did not advance beyond framework commitments. The COMESA Treaty (Article 85) and the SADC Protocol on Transport, Communications and Meteorology already address vehicle standards, driving licences, insurance and axle loads, but neither provides a binding, mutually recognized regime. The Tripartite Vehicle Load Management Agreement (VLMA) and Multilateral Cross-Border Road Transport Agreement (MCBRTA) would harmonize axle loads, overload fees, operator registration, driver licensing and dispute resolution. They were adopted by the Tripartite Council of Ministers on 29 March 2023 and have awaited Heads of State signature since. The stall is not an outlier but the region's characteristic pattern: the Walvis Bay–Ndola–Lubumbashi Agreement took fourteen years to ratify (2010–2024) and the North-South

Corridor MoU seventeen years to sign (2009–2026). Nothing, however, prevents early action. Angola, Eswatini, Lesotho, Namibia, Zambia and Zimbabwe are already amending domestic law against the accompanying model laws. Ratification withholds only the reciprocal effect — mutual recognition and the multilateral permit regime — not the substance. Domestication should accelerate ratification, not substitute for it.

Why signature has stalled is a political economy question that the evidence can frame but not yet answer. Three explanations are plausible and should be tested in the stakeholder consultations. The first is revenue: overload fees, road user charges and transit fees fund road agencies and treasuries, and the NTB register shows that complaints whose resolution costs revenue are the least likely to be resolved (section 3.4). The second is protection of domestic road hauliers: the MCBRTA's permit and mutual-recognition regime would open national markets to a regional fleet dominated by large operators, a concern sharpened by disputes over the employment of foreign truck drivers in South Africa. The third is sovereignty and low salience: the instruments cede regulatory discretion to a Tripartite regime, and the Tripartite Summit that must sign them meets infrequently. That six Member States are domesticating the substance suggests the objection lies in reciprocity — admitting other States' operators and certificates — rather than in the standards themselves.

Simplified Trade Regimes illustrate the same implementation gap at the small-trader end. The COMESA STR operates through bilateral common lists; SADC's own framework, in development since 2017, moved to implementation readiness in 2026, with Malawi, Mozambique, Tanzania, Zambia and Zimbabwe as pilot States. Constraints are procedural rather than legal: too few Trade Information Desk Officers, de facto priority for large consignments, and unchanged requirements for permits and SPS and veterinary certificates. A simplified regime that requires the same certificates as the standard regime simplifies little. The obstacles are also political economic: border and SPS agencies derive fees and discretion from documentary requirements, large traders have a stronger voice than small ones, and discretionary procedures leave room for informal payments. Simplification therefore needs a champion with authority over all border agencies, not customs alone.

3.6 Corridor management institutions: effective but fragile

The corridor is the natural unit of trade facilitation in Southern Africa, and corridor management institutions are where trade and transport facilitation meet on the ground. Where such an institution is sustained, performance exceeds what a Member State's size or income would predict: Namibia, with the Walvis Bay Corridor Group in operation since 2000, ranks 66th on the LPI 2023 with balanced scores across all six dimensions. The institutions are nonetheless structurally fragile. Under the SADC subsidiarity principle they must mobilize their own resources. The Maputo Corridor Company collapsed in 2001 and its successor, the Maputo Corridor Logistics Initiative, appears to have closed in 2019. The one consolidation the region has achieved — the Dar es Salaam Corridor Committee's absorption into the Central Corridor agency — was delivered by traffic competition rather than by design.

Four corridors, four different binding constraints

- **North-South Corridor.** Two OSBPs and sustained investment, yet almost sixteen days from Durban to Kasumbalesa. Residual delay appears to be spread across weighbridges, permits, road user charge points, insurance and driver documentation — the interface the VLMA and MCBRTA were designed to harmonize. Segment-level data are needed to confirm this. The corridor's own MoU was signed only in January 2026.
- **Nacala Corridor.** Malawi reports 100 per cent TFA implementation, an operating single window and an OSBP at Mwami/Mchinji since December 2022, yet its regional share of total trade barely moved (31.4 to 30.8 per cent). The second OSBP, Dedza/Calomue, opened only in June 2025, after the latest trade observation, so its effect cannot yet be assessed. Operating hours and corridor capacity, not law, appear to be the constraint.

- **Walvis Bay corridor system.** The region's best-governed corridor system coexists with its sharpest fall in regional orientation (Namibia's regional share of total trade, 62.9 to 40.8 per cent; ITC data show its regional export share rising, so the fall lies mainly in imports). Efficient corridors serve whichever direction trade already flows; composition, not facilitation, is the constraint.
- **Mauritius.** Near-full TFA compliance, an operating single window and AfCFTA Guided Trade Initiative pioneer status, with a regional trade share unchanged at 12.0 per cent. Its LPI international-shipments score ranks 137th of 139: the binding constraint is maritime connectivity, which the customs-centred agenda does not touch.

A single regional facilitation programme addresses at most one of these constraints well. Differentiation by corridor is a precondition for results.

3.7 A measurement deficit

The region cannot yet answer the question "how long does it take to move a container from Durban to Lusaka this quarter?" from any standing source. The LPI 2023 covers six of the eleven Member States, omitting Eswatini, Lesotho, Malawi, Mozambique and Zambia. These are four land-linked states and the anchor of the Maputo, Beira and Nacala corridors. With the 2025 move to LPI 2.0, the comparable score series has ended. Time Release Studies, the TFA's own recommended instrument, began only in 2023–2025. Zambia's Ministry of Commerce, Trade and Industry reports border studies at Chirundu and Kazungula in 2022, 2023 and 2024; subject to checks on the comparability of their measurement definitions, these give repeated observations at two crossings, but not a corridor-wide series. More than twenty institutions publish facilitation evidence, with no consolidation layer. The headline informal cross-border trade figures — US$17.6 billion, 30–40 per cent of intra-regional trade, 70 per cent women traders — trace to a single 2010 estimate. The gender figure is contradicted by independent border enumeration that found women at 55 per cent of traders counted.

Table 3 Trend scorecard, 2015–2025

Candidate trend	Assessment	Basis
Rising notified WTO TFA compliance	Trend	Policy/legal layer; driven by external commitments and donor programming
Digitalization of trade and transport processes	Trend (strongest)	Single windows, e-CoO, CTMS; accelerated by COVID-19; bifurcating
Expansion of OSBP infrastructure	Trend	Institutional layer only; not matched at the performance layer
Deepening of the trade-side legal architecture	Trend	TFTA in force 2024; AfCFTA ratification near-universal
Digitalization of private instruments and statutory payments	Trend	Institutional layer; Yellow Card, payment rails, wallet payment of duty; non-residents not reached
Rising visa openness	Trend (policy layer)	Five Member States rising 2016–2025; driver mobility not improved
Intra-SADC trade: value and share	Value rising; share a pattern	Value +24.5% (nominal), 2015–24; share 22.0% to 19.1%, driven mainly by extra-regional growth; 19–23% range, no sustained direction, on export data
Improvement in clearance and transit times	Not established	No repeated corridor-wide measurement; repeated border-level studies at Chirundu and Kazungula only
Improvement in logistics performance	Not established	LPI covers 6 of 11; series discontinued
Change in NTB incidence or informal trade	Not established	Complaint data cannot separate incidence from reporting; ICBT unmeasured since 2010
Integration in services and digital trade	Not established	No regional services trade series; Protocol on Trade in Services in force since 2022
Adoption–implementation lag in transport and corridor instruments	Pattern	Persistent over four decades, with no directional change

Source: ECA SRO-SA Draft Report, Table 4.4.

3.8 Services, digital trade and the logistics–finance interface

Like most regional monitoring, this assessment is weighted to merchandise, because no regional series on services trade exists: the SADC trade bulletin covers goods only, and bilateral services data are sparse and largely modelled. The gap matters. Services are where facilitation is delivered — road haulage, clearing and forwarding, cargo and motor insurance, trade finance and payments — and they are the largest sector in most Member States' economies. The SADC Protocol on Trade in Services entered into force in January 2022, with first-round commitments in communication, financial, tourism, transport, construction and energy-related services, but its use and effect are not yet monitored.

Three services frictions bear directly on the corridors. Cross-border motor insurance is harmonized through the COMESA Yellow Card in COMESA States but not across SADC as a whole, so trucks on SADC-only routes typically buy cover at the border — a gap the region could close by extending the Yellow Card across SADC (Table 5, action 16). Regional payments infrastructure is advancing: the SADC-RTGS has settled more than ZAR 20 trillion since 2013 across 15 countries and 88 participating banks, but its low-value Transactions Cleared on an Immediate Basis (TCIB) scheme cleared only 325 payments in July 2026, so small traders still settle informally or at high cost. Digital trade is expanding through e-commerce, mobile money and paperless trade documents (section 3.2), and the AfCFTA Digital Trade Protocol, adopted in 2024, provides a continental framework, but no regional data yet measure its scale. Trade finance is a further unmeasured gauge of whether regional trade relationships are deepening. The full report extends the analysis to services, and the measurement agenda in section 6 includes them.

3.9 What the international benchmarks and the private sector add

Three international benchmarks reach the same diagnosis by different routes. The WTO TFA Database records what Member States have notified; the UN Global Survey 2025 what experts and governments report as implemented; and the OECD Trade Facilitation Indicators 2025 what border regulation and practice contain. All three record rising implementation, fastest in Sub-Saharan Africa; all three show legal reforms running ahead of practice and the cross-border step lagging; and the OECD estimates that operational practice, not regulation, carries the trade effect. They differ on individual countries — Botswana is a leading OECD performer but implements only 56–58 per cent of the Survey's measures — and on trade costs, which the OECD models as falling with reform while the Survey observes them rising. None of the three measures the transport dimension or corridor time.

Private and public-private actors have become the operating layer of facilitation. Of 30 measures documented in the study — fleet telematics, digital freight platforms, PPP single windows, border and rail concessions, the COMESA Yellow Card, regional payment rails and mobile-money payment of statutory charges — most execute a public mandate through private balance sheets, software or capital, and their digitalization is a trend: the Yellow Card moved to digital issuance in 2018, SADC-RTGS volumes roughly tripled during 2024, and Lesotho and Zimbabwe accept wallet payment of customs duty. Their gains, however, stop at the firm and at the national border gate. The available evidence does not establish whether corridor-crossing times have improved. Regional instruments are, in practice, executed nationally, and non-resident drivers and traders still meet cash, US-dollar or card collection at the point of entry.

Visa openness has improved, but not for the people who move the freight. On the AfDB/AUC Africa Visa Openness Index, Namibia, Angola, Malawi, South Africa and Mozambique rose over 2016–2025, and intra-SADC visa-free reciprocity reached 60 per cent in 2024 before slipping to 52 per cent in 2025. The index measures casual travel, while cross-border commercial truck drivers are increasingly treated as workers. The DRC — terminal market of the North-South and Lobito corridors — withdrew Zimbabwean drivers' exemption

in 2025 and now charges a US$50, 30-day work visa paid in cash, which can expire in the Kasumbalesa queue. No regional driver-visa instrument exists.

4 Why the outcomes have not followed

Because the study cannot establish what would have happened without the reforms, and because the regional share is driven largely by commodity values (section 2), the five cumulative explanations below are hypotheses for testing rather than measured effects. Together they suggest why a decade of reform has not visibly changed the structure of regional trade:

1. **Reform stopped at the wrong layer.** The region performs well on law and on institutions at designated sites, but cannot demonstrate performance. Notification should not be mistaken for operation, nor a commissioned facility for a functioning one.
2. **The transport pillar was left unfinished**, in a region where six of eleven Member States are land-linked and transit costs are the primary cost structure of their trade.
3. **Corridor governance lags by habit, not accident.** Three SADC-level proposals for stronger corridor coordination (2007, 2012, 2019) remain unimplemented. Corridor institutions are fragile because, under the subsidiarity principle, they must fund themselves.
4. **Reform was sited narrowly.** Gains at Chirundu, Kazungula and the Nacala and Walvis Bay corridors are real but site-specific; they cover too little of regional trade to move the aggregate. Facilitation needs to be corridor-wide.
5. **Composition caps the return.** Precious stones and metals, mineral fuels and copper make up roughly 40 per cent of intra-SADC exports, and manufacturing value added has stayed at 11–12 per cent of GDP. Cheaper movement of what the region already trades does not create regional demand for manufactures. Namibia, with the region's best-governed corridor system and its sharpest fall in regional orientation (62.9 to 40.8 per cent), shows that efficient corridors serve whichever direction trade already flows.

These operated through a decade of recurrent shocks noted in section 2, compounded by the decline of South Africa's rail and port system, the 2024 Lebombo closures and foot-and-mouth disease bans. Only COVID-19 triggered a coordinated regional response, and that response was not institutionalized. Transit-dependent states absorbed shocks that originated in their neighbours.

5 Bridging Eastern and Southern Africa: implications for the joint agenda

The Southern African evidence bears directly on the joint session's theme, because the instruments and corridors that matter most already cross the sub-regional boundary. Direct trade across that boundary is still small. In 2025 the eleven SRO-SA Member States traded about US$12.1 billion with ECA's Eastern Africa sub-region, but US$9.7 billion of it was with the five Eastern African countries that are also SADC members — the DRC, Tanzania, Madagascar, Seychelles and Comoros; trade with the nine outside SADC was about US$2.4 billion, under 1 per cent of extra-SADC trade (UNCTADstat).

- **The TFTA is a bridge, but origin overlap is its weakest span.** The TFTA spans 29 participating States and was designed to address multiple membership. The NTB register shows that origin rules, chiefly under the SADC and COMESA regimes, are already the largest single friction; TFTA and AfCFTA preferences, still little used, add further layers. Converging origin rules across COMESA, EAC and SADC, and measuring which regime traders actually use, is the most immediate cross-regional dividend available. Using the Tripartite as a common platform for AfCFTA implementation, rather than negotiating State by State, would extend the same dividend to the continental level.
- **Shared corridors are already cross-regional.** The North-South Corridor carries Southern African trade to the DRC Copperbelt. Malawi and Zambia acceded to the Central Corridor Transit Transport Facilitation

Agency in 2023–24, absorbing the former Dar es Salaam Corridor Committee — a consolidation driven by traffic competition rather than regional design. Zambia sits at the intersection of six corridors, linking both sub-regions' ports.

- **The Tripartite transport instruments are the missing link for both sub-regions.** The VLMA and MCBRTA, negotiated by the same Tripartite machinery as the TFTA, would harmonize cross-border road transport regulation across all three RECs. Their signature is the single action with the widest cross-regional reach.
- **Eastern Africa offers a transferable measurement model.** The Central Corridor Transport Observatory has tracked about forty indicators since 2013 and reports Dar es Salaam port dwell time falling from roughly twenty-two days to under seven. Extending that architecture to Southern African corridors would cost less than designing a new one. It would also link with the Tripartite CTMS and the Namibia-hosted TRIPS platform.
- **Multimodal and inland waterway options need an evidence base.** The concept note highlights multimodal logistics and inland waterways. Southern Africa's facilitation evidence is overwhelmingly road and border-post based, and the region lacks comparable performance data on rail, port and waterway segments. Any joint initiative should build measurement in from the outset rather than repeat the road experience.

Table 4 Instruments that already bridge Eastern and Southern Africa: status at September 2026

Instrument	Status	Implication for the joint agenda
COMESA-EAC-SADC Tripartite FTA	In force since 25 July 2024	Legal bridge for market access; origin rules overlap with SADC, COMESA and AfCFTA regimes; utilization still low
Tripartite online NTB mechanism	Operating; 960 complaints, 871 resolved	Shared diagnostic register for both sub-regions; weak where resolution costs revenue
Tripartite VLMA and MCBRTA	Adopted by Council 29 March 2023; awaiting Heads of State signature	Would harmonize cross-border road transport across all three RECs; six SRO-SA States already domesticating
Corridor Trip Monitoring System	Operating; created as a COVID-19 response	Corridor-level tracking across RECs; integration with customs management systems incomplete
Tripartite Simplified Trade Regime	Framework under development	Could cover more than sixty country pairs; must cut documentary requirements to add value
COMESA RCTG and e-Certificate of Origin	Operating	Transit guarantee and digital origin proof available for extension across the Tripartite space
COMESA Yellow Card (regional third-party motor vehicle insurance scheme)	Operating; does not yet cover all SADC Member States	A trusted, affordable and standardized, mutually recognized cross-border motor insurance cover for vehicles and drivers; extending it across SADC would remove an insurance purchase at the border on SADC-only routes

Sources: ECA SRO-SA Draft Report, §§4.2, 4.5–4.7; Tripartite NTB mechanism (14 September 2026).

6 Priority actions

The preliminary conclusion of the study is that Southern Africa has largely exhausted the returns from further trade-side commitment. The binding constraint has moved to execution, measurement and the transport dimension. Table 5 sequences the study's seventeen recommendations by horizon; the first four can largely be funded from existing budgets, though not at zero cost: longer commercial hours at border posts, for example, add staffing costs.

Table 5 Priority actions, by actor and horizon

#	Action	Lead actor	Horizon / cost
1	**Sign the VLMA and MCBRTA** at the next Tripartite Summit, with domestication in parallel and ratification within twelve months, informed by an assessment of the revenue and market-access concerns behind the delay	Heads of State; Tripartite Summit	Quick win; administrative cost, within existing budgets
2	**Align OSBP commercial hours with passenger hours**, starting with Beitbridge, Mwami/Mchinji and Dedza/Calomue	National governments; border agencies	Quick win; staffing cost, largely within existing budgets

#	Action	Lead actor	Horizon / cost
3	**Publish national plans for the 2026–27 TFA commitment cliff**, with quarterly reporting by National Trade Facilitation Committees, stating how each Category C measure will be financed and using the TFA extension procedure early where assistance is not secured	Eswatini, Lesotho, Zimbabwe, Angola; NTFCs	Six months; low
4	**Report barriers systematically to the Tripartite NTB mechanism** and share operator time and cost data with corridor institutions	Business associations; FESARTA	Immediate; minimal
5	**Complement notification-based monitoring with systematic performance measurement:** a rolling Time Release Study programme on the six principal corridors, with corridor transit time and its variance as RISDP headline indicators; and a dashboard of outcome indicators in place of the single regional trade share — regional trade at constant prices, export and import-sourcing shares excluding fuels and minerals, preference utilization, trade in manufactured intermediates and services trade	SADC with COMESA and SACU	Design in 12 months; first cycle by 2029
6	**Converge SADC and COMESA rules of origin** and record which preference regime each consignment claims, through a joint study reporting to the Tripartite Council	SADC and COMESA, with EAC and AfCFTA Secretariats	18 months; moderate
7	**Pair facilitation with industrial policy**: target the corridors and border posts serving SADC Industrialisation Strategy value chains	SADC Secretariat; Member States	Medium term; reprioritization
8	**Institutionalize a regional crisis protocol** building on the COVID-19 guidelines: priority lanes, no unjustified or disproportionate SPS restrictions on sealed goods in transit, while keeping risk-based health controls, and a register of closures	SADC; Tripartite Task Force	Draft in 12 months; low
9	**Concentrate partner investment on identified bottlenecks**, rebalancing between unfit physical facilities and operational measures	Development partners	Next programming cycle; reallocation
10	**Establish a pooled Corridor Development Fund** and a provisional-application mechanism for corridor agreements	SADC Summit; Member States	Medium term; significant
11	**Commission a corridor rationalization review** and an annual State of SADC Corridors report	SADC Secretariat	18 months; moderate
12	**Re-estimate informal cross-border trade** with a common border-enumeration method	ECA SRO-SA, UN Women, SADC, NSOs	Design 2027, field 2028
13	**Orchestrate private and public-private facilitation**: telematics data-sharing compacts, statutory payments open to non-residents, and disclosure of PPP terms	National governments	6–24 months; low
14	**Share data and regionalize private instruments**: an industry data-sharing protocol and digital Yellow Card claims settlement	Business associations, insurers, banks	Immediate; minimal
15	**Establish a regional professional-driver visa regime**, starting on the DRC corridors	SADC, COMESA and the DRC	Pilot in 18 months; low
16	**Adopt a single, mutually recognized cross-border third-party motor insurance scheme**: SADC to adopt the COMESA Yellow Card as the regional instrument meeting the requirements of the SADC Protocol on Transport, Communications and Meteorology	SADC with COMESA and the EAC; insurance regulators	Immediate decision; roll-out within 24 months; low
17	**Read the international benchmarks together** in a regional facilitation scorecard, and add a transport module to them	ECA SRO-SA with SADC, COMESA and SACU	12 months; low

Source: ECA SRO-SA Draft Report, Chapter 8 (Recommendations R1–R17, renumbered here by priority).

Where ECA can add value. In line with the meeting's intended outcomes, the evidence points to seven areas for targeted ECA support, jointly by SRO-EA and SRO-SA:

- a standard regional Time Release Study and corridor-observatory methodology, built on the Central Corridor model;
- analytical support to the SADC–COMESA origin convergence study;
- a tariff-equivalent costing of transport-related barriers, for which the study has specified the method but lacks segment data;
- the informal cross-border trade re-estimation;
- a framework for measuring services and digital trade, starting with transport, insurance and payment services;

- a regional facilitation scorecard that reads the WTO, UN Global Survey and OECD benchmarks together and adds the transport dimension they omit;
- advocacy, through the ICSOE and the Conference of Ministers, for Heads of State signature of the Tripartite transport instruments.

7 Conclusion

Southern Africa enters the TFTA and AfCFTA era with a well-developed trade-side legal architecture, an unfinished transport-side architecture, corridor performance that is not measured consistently, an NTB mechanism that succeeds procedurally and fails fiscally, and overlapping SADC and COMESA rules of origin, with Tripartite and AfCFTA regimes layered above them. If the AfCFTA is implemented the way the SADC Free Trade Area was — as a tariff and legal instrument, with transport treated as a downstream matter — the evidence gives no reason to expect a different result. Compliance will be notified, and regional trade will continue to follow commodity prices rather than the agreement. The alternative is neither new nor expensive.

Southern Africa's trade facilitation problem in 2026 is not primarily one of insufficient commitment, law or institutions. It is a problem of **unfinished sequences**: instruments adopted but not signed; facilities commissioned but not brought to capacity; measures notified but not operated; corridors measured once but not routinely; and a transport dimension that the region's own evidence identifies as material but its legal architecture still treats as secondary.

The region does not need a new agenda. It needs to finish the one it has.

8 Issues for the round-table

1. What revenue, haulier-protection or sovereignty concerns hold back signature of the VLMA and MCBRTA, and what enforcement mechanism — a peer-review deadline, a Summit decision, a published scorecard — would move them from Council adoption to signature, ratification and implementation, and could the joint ICSOE recommend one?
2. How can the TFTA be used to rationalize, rather than add to, the overlapping rules of origin that generate the region's largest NTB category?
3. What would it take for OSBP commercial operating hours to match passenger hours at the principal crossings, and what stands in the way?
4. How should facilitation programming be linked to industrial and value-chain policy so that lower trade costs translate into a higher regional share of manufactured trade?
5. Which Eastern African practices — the Central Corridor observatory and corridor agency model — can be adopted in Southern Africa, and which Southern African instruments can be extended east?
6. Should the region adopt a visa or work-permit regime for professional cross-border commercial truck drivers, and through which instrument — the MCBRTA, a SADC protocol or bilateral arrangements?

Principal sources

SADC Secretariat (2026), Merchandise Trade Statistics Bulletin, April 2026; SADC Secretariat (2025), North-South Corridor Time Release Study; WTO (2026), Trade Facilitation Agreement Database, tfadatabase.org; COMESA-EAC-SADC Tripartite online NTB mechanism, tradebarriers.org (retrieved 14 September 2026); World Bank (2023), Connecting to Compete: International LPI; UNECA (2025), Assessing Regional Integration in Africa XI; SADC (2024), Report of the SADC Executive Secretary on the RISDP 2020–2023; ECA SRO-SA (2026), The State of Regional Integration in Southern Africa: Trends in Trade and Transport Facilitation, Draft Report; ITC Trade Map (retrieved October 2026); World Bank Commodity Price Data (Pink Sheet); South African Reserve Bank, SADC-RTGS Settlement Statistics and Indicators, July 2026; B. Simons (2026), "Replace the intra-African trade share with a meaningful statistic about trade integration", Brookings Institution, 13 October 2026; Zambia Ministry of Commerce, Trade and Industry, border studies at Chirundu and Kazungula (2022–2024); UN ESCAP and UN regional commissions (2025), UN Global Survey on Digital and Sustainable Trade Facilitation 2025; OECD (2025), OECD Trade Facilitation Indicators: Monitoring Policies up to 2025; AfDB and AUC, Africa Visa Openness Index (2016–2025 editions).