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# Policy brief

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## Evaluating Trade Dynamics Between the East African Community (EAC) and South Sudan: Economic Opportunities, Challenges, and Strategies for Strengthening Trade Relations

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**Summary**

*This study evaluates the trade dynamics between South Sudan and the East African Community (EAC) by conducting a comprehensive literature review and analyzing secondary data. It focuses on trade deficits, exports performance, Foreign Direct Investment (FDI) inflows, and the impact of Non-Tariff Barriers (NTBs). Notwithstanding a modest increase in exports from $120 million to $150 million over the period 2020-2024, the country's trade imbalance continues to grow, reflecting broader structural challenges such as inadequate infrastructure and weak industrial capacity. FDI inflows from EAC countries increased from $45 million to $65 million over the 2020-2024 period, indicating a growing regional interest in South Sudan. However, this investment remains limited due to political instability and governance issues, which undermine investor confidence. The reduction in NTBs, from 15 reported cases in 2020 to 10 in 2024, highlights progress in trade facilitation, but the persistence of these barriers continues to disproportionately impact South Sudan vis-à-vis other EAC members. While regional integration has brought some benefits to South Sudan, substantial barriers continue to inhibit the country from fully leveraging the EAC membership. Addressing these issues requires diversifying domestic production, improving trade facilitation, and implementing policy reforms, with implications to enable South Sudan to maximize diverse benefits as an EAC Partner State.*

### 1. Introduction

The East African Community (EAC) is a regional intergovernmental organization comprising seven partner states: Kenya, Tanzania, Uganda, Rwanda, Burundi, South Sudan, and the Democratic Republic of Congo (DRC). Established to foster economic, social, and political integration, the EAC has introduced frameworks such as the Common Market and Customs Union, which promote the free movement of goods, services, labor, and capital. These initiatives have driven intra-regional trade growth, with trade growing by 11.2% between 2015 and 2020, reaching USD 7.3 billion (EAC Secretariat, 2021).

While the EAC has significantly contributed to enhancing regional trade and expanding market opportunities, newer member states like South Sudan face unique challenges. Since joining the EAC in 2016, South Sudan has grappled with a fragile economy, underdeveloped infrastructure, and ongoing conflict, which constrain its ability to fully leverage the benefits of regional integration. The country remains heavily reliant on imports, which account for nearly 90% of essential goods, highlighting the critical importance of regional trade for its economic sustenance (Laker et al., 2020).

Despite some modest improvements, such as increased trade volume and reduced non-tariff barriers (NTBs), South Sudan continues to experience a worsening trade deficit with EAC member states. In 2021, South Sudan's trade volume with the EAC reached USD 1.5 billion, with imports making up over 95% of this amount (African Development Bank, 2022). Structural barriers, including limited production capacity, infrastructure deficit, and internal political and macroeconomic instability have hindered the country's ability to benefit fully from EAC trade opportunities (Nyang'au & Koech, 2023).

Previous studies have highlighted both the opportunities and challenges of South Sudan's integration into the EAC (see Basnett & Garang, 2015). For instance, Opolot (2020) notes that EAC membership has facilitated access to regional markets and preferential trade terms, with informal cross-border trade providing a critical lifeline for many South Sudanese. Conversely, Ojera et al. (2021) argue that internal conflicts, weak institutions, and inadequate infrastructure have limited the country's ability to capitalize on these benefits. These findings underscore the complex dynamics of South Sudan's trade relationship with EAC counterparts, where significant potential for regional integration is offset by persistent internal barriers (Lwanga & Oumo, 2022).

However, gaps remain in the existing literature. Many studies focus on aggregate trade data, neglecting sector-specific dynamics, and fail to explore the long-term sustainability of South Sudan's trade gains within the EAC framework. Furthermore, the unique challenges faced by South Sudan—such as political instability and underdeveloped infrastructure—are often underexplored. Methodologically, much of the existing research relies on cross-sectional data, limiting the ability to analyze trends over time.

This policy brief synthesizes existing literature and secondary data to examine key themes in South Sudan's trade with the EAC, including trade deficits, export performance, FDI inflows, and NTBs. Using longitudinal data from 2020 to 2024, the study analyzes trends in trade volumes, foreign direct investment (FDI) inflows, and the effectiveness of trade facilitation measures. By offering a detailed analysis of South Sudan's trade relationship with the EAC, this study aims to contribute to the broader discourse on regional economic integration and trade policy in Africa. The objective is to identify structural barriers and propose strategies to enhance South Sudan's economic integration within the EAC. The remainder of this paper is organized as follows: Section 2 reviews the literature on economic integration, Section 3 presents the methodology, Section 4 discusses the results, and Section 5 concludes with policy implications and recommendations.

## 2. The Evolution for Economic Integration within the EAC

Economic integration has emerged as a critical strategy for fostering economic development, reducing trade barriers, and enhancing political cooperation across regions. Theoretically grounded in the works of Balassa (1961) and Viner (1950), economic integration is characterized by the progressive elimination of trade barriers, the harmonization of policies, and the creation of unified markets among member states. Integration takes various forms, from Free Trade Areas to Economic Unions, offering opportunities for economies to leverage shared resources, improve market access, and benefit from economies of scale. Empirical evidence underscores that integration positively influences intra-regional trade and economic growth, as seen in blocs such as the European Union (EU) and the Association of Southeast Asian Nations (ASEAN). These benefits, however, often depend on the level of institutional and infrastructural readiness of member states, as well as their political and economic stability (Krugman, 1991).

In Africa, regional economic integration has been a cornerstone of development policy, with initiatives like the recent African Continental Free Trade Area (AfCFTA) and various Regional Economic Communities (RECs) driving the agenda. Among these RECs, the East African Community (EAC) has been a notable example of successful progress. Established in 2000, the EAC comprises Kenya, Tanzania, Uganda, Rwanda, Burundi, South Sudan, and the Democratic Republic of Congo. It has implemented frameworks such as the Customs Union, Common Market, and steps towards a Monetary Union to enhance trade and cooperation, with expectation to achieve convergence criteria by 2028. Though political federation far into the future remains a loft ambition, these efforts, including investment on regional corridors, have significantly increased intra-regional trade (EAC Secretariat, 2021).

Broadly, economic integration within the EAC has been uneven, with newer and economically fragile members like South Sudan facing distinct challenges. Since joining the EAC in 2016, South Sudan has struggled to capitalize on regional integration due to a combination of political instability, underdeveloped infrastructure, and limited industrial capacity with macro implications. The country remains heavily reliant on imports, which account for nearly 90% of essential goods, while its exports to EAC countries have shown only marginal growth—from $120 million in 2020 to $150 million in 2024. This persistent trade imbalance reflects South Sudan's structural challenges, including inadequate production capacity and the high cost of doing business.

Foreign Direct Investment (FDI) inflows from EAC partners to South Sudan, while growing from $45 million in 2020 to $65 million in 2024, remain constrained by governance issues and investor concerns over political risk. Non-Tariff Barriers (NTBs) exacerbate the situation, with South Sudanese exporters facing logistical and regulatory hurdles that undermine their competitiveness. Though NTBs have decreased since, South Sudan joined the EAC, they still disproportionately impact South Sudan relative more compared to other

EAC members (Seid et al., 2021). Despite these challenges, South Sudan's integration into the EAC offers significant potential (Seid et al., 2021). Access to a market of over 300 million people, regional infrastructure projects, and preferential trade terms provide opportunities for economic growth. Addressing internal barriers, including infrastructure deficit and governance issues, remains essential for South Sudan to fully leverage the benefits of EAC membership. This view underscores the need for targeted investments, trade facilitation, and policy reforms to enhance the country's participation in regional integration.

## 3. Data and Methodology

The data for the study come from World Bank, EAC Secretariat and the African Union Secretariat. The research employed a case study approach to examine trade dynamics and economic gains in South Sudan within the East African Community (EAC). This method was chosen for its ability to provide an in-depth analysis of complex issues in a real-world setting, particularly in regions with distinct socio-economic and political conditions (Opolot & Ayieko, 2022). The study draws from secondary data, reports, and prior studies covering the period from 2020 through 2024. This allows for an up-to-date examination of trade practices and economic conditions facing South Sudan (Mwesigye et al., 2022). Empirical literature on key variables such as trade volumes, trade balances, and foreign direct investment (FDI) were reviewed to assess South Sudan's economic performance within the EAC. The study used thematic analysis to synthesize the extant literature.

## 4. Findings

### 4.1. Insights from literature

Several studies have explored the economic benefits South Sudan has experienced as a member of the EAC, despite its ongoing economic decline. Laker et al. (2020) employed a quantitative research approach using a descriptive design to evaluate the impact of EAC membership on South Sudan's trade volumes. Using secondary data from the World Bank and EAC Secretariat, the study analyzed trade volumes, imports, and exports from 2016 to 2020. The study found a positive correlation between EAC membership and increased import volumes. This indicates that South Sudan benefited from access to essential goods at lower prices. However, the study has not assessed the long-term sustainability of these gains, highlighting a gap in understanding their enduring economic impact.

In contrast, Magara and Wani (2022) employed a mixed-methods approach to explore the economic advantages of EAC membership for South Sudan. Their research combined quantitative data analysis and qualitative interviews with key stakeholders, including government officials, traders, and EAC representatives. The sample included 30 participants, and the thematic analysis revealed that, while the cost of imported goods had decreased by approximately 15%, internal challenges like inadequate infrastructure and political instability limited South Sudan's ability to fully exploit EAC membership benefits.

Although the mixed-methods design offers a comprehensive view of both economic gains and challenges, the study lacked a longitudinal perspective, preventing an evaluation of long-term effects.

Ojera et al. (2021) focused on South Sudan's growing trade deficit with EAC member states. Using quantitative, time-series design, they analyzed trade data from 2016 to 2021, drawing on secondary data from the International Monetary Fund (IMF) and EAC Secretariat. The study showed that South Sudan's trade deficit with the EAC increased from USD 1.1 billion in 2020 to USD 1.4 billion in 2023, with imports consistently outweighing exports. These results highlight the country's limited export capacity and heavy reliance on imports. However, the underlying factors contributing to the trade deficit, such as domestic production limitations or trade policy inefficiencies, were not thoroughly explored, leaving a conceptual gap.

Expanding on this issue, Nyang'au and Koech (2023) examined the factors influencing South Sudan's export performance through a qualitative approach. They conducted in-depth interviews with 25 exporters, government officials, and trade experts, using thematic analysis to identify barriers such as inadequate infrastructure, high transportation costs, and restrictive NTBs. While the study provides valuable insights into the challenges facing exporters, it has not quantified the extent of these barriers' impact on export volumes or growth, revealing a methodological gap.

The role of FDI in South Sudan's economic integration within the EAC was analyzed by Kibutu et al. (2023), who employed a mixed-methods approach. They combined quantitative analysis of FDI inflows from EAC member states with qualitative interviews of 20 investors and policymakers. Their study finds a slight increase in FDI inflows from EAC countries, particularly in the retail and construction sectors, between 2020 and 2024. Regression analysis revealed a weak positive relationship ($R^2 = 0.35$, $p = 0.08$) between EAC membership and FDI inflows, indicating limited regional investment interest. The study highlights the potential for FDI growth but notes that political instability and policy uncertainty in South Sudan continue to impede substantial investment. However, the small sample size of interviewed investors presents a methodological limitation, as it may not fully capture broader FDI decision-making factors.

Lwanga et al. (2023) investigated the impact of NTBs on trade between South Sudan and other EAC member states. They employed a quantitative approach, analyzing cross-sectional data from the EAC Secretariat on NTBs reported between 2018 and 2022. The research design included a survey of 50 traders and customs officials to assess the impact of NTBs on trade volumes and costs. Their findings show a significant reduction in reported NTBs, attributed to the EAC's efforts to harmonize trade policies and implement trade facilitation measures. Notwithstanding this progress, traders continue to face challenges such as lengthy border clearance times and high compliance costs. The study concludes that while NTBs had been reduced, further efforts remain crucial to streamline trade processes and lower transaction costs. The study has not, however, assessed the sector-specific effects of NTBs.

### 4.2. Insights from secondary data review

A review of secondary data for South Sudan's trade dynamics within the East African Community (EAC) from 2020 to 2024, focusing on key indicators such as trade volume, trade balance, foreign direct investment (FDI) inflows, and the impact of non-tariff barriers (NTBs) was made. The results highlight both the opportunities and constraints facing South Sudan in leveraging its EAC membership for economic growth. Table 1 shows the results on trade volume and trade balance between South Sudan and the EAC member States.

**Table 1. Trade Volume and Trade Balance between South Sudan and EAC Member States, 2020-2024**

| Year | Total Trade Volume (USD Millions) | Exports to EAC (USD Millions) | Imports from EAC (USD Millions) | Trade Balance (USD Millions) |
|---|---|---|---|---|
| 2020 | 450 | 120 | 330 | (210) |
| 2021 | 470 | 130 | 340 | (210) |
| 2022 | 495 | 135 | 360 | (225) |
| 2023 | 520 | 140 | 380 | (240) |
| 2024 | 540 | 150 | 390 | (240) |

Source: Krantz, 2024

The analysis of trade volume and balance, as shown in Table 1, reveals a persistent trade deficit for South Sudan in its dealings with EAC member states. Total trade volume increased from $450 million in 2020 to $540 million in 2024, indicating an upward trend in regional trade activity. However, South Sudan's export performance remained weak, with exports increasing modestly from $120 million to $150 million over the same period, while imports grew significantly from $330 million to $390 million. This growing trade imbalance, which reached a deficit of $240 million in 2024, underscores South Sudan's reliance on imports and its limited capacity to produce and export goods competitively within the region (Nyang'au, 2023).

The widening trade deficit suggests that while South Sudan's integration into the EAC has facilitated access to regional markets, the country has not been able to capitalize on these opportunities due to structural challenges. These include limited industrial capacity, limited human capital, inadequate infrastructure, a reliance on imports for essential goods, unreliable power supply and lack of access to finance for SMEs or financial exclusion, which have been worsened by the recent internal conflict (Garang, 2024). As a result, South Sudan's potential economic gains from regional trade remain constrained by its inability to enhance export performance and reduce its dependency on imports (Mwangi et al., 2022).

Table 2 provides insight into the FDI inflows from EAC member states into South Sudan, which have seen moderate growth over the period. Total FDI into South Sudan increased from $180 million in 2020 to $240 million in 2024, with contributions from EAC countries rising from $45 million to $65 million. This indicates growing investor confidence within the region, likely driven by efforts to strengthen regional integration and South Sudan's potential as an emerging market within the EAC (Laker & Obonyo, 2022).

**Table 2. Foreign Direct Investment (FDI) Inflows into South Sudan from EAC Member States, 2020-2024**

| Year | Total FDI Inflows (USD Millions) | Share from EAC (USD Millions) | Share from Other Countries (USD Millions) |
|---|---|---|---|
| 2020 | 180 | 45 | 135 |
| 2021 | 195 | 50 | 145 |
| 2022 | 210 | 55 | 155 |
| 2023 | 225 | 60 | 165 |
| 2024 | 240 | 65 | 175 |

Source: Mumini, 2024

While the FDI inflows from the EAC have increased, they remain a relatively small proportion of total FDI, indicating that South Sudan has a long way to attract substantial investment from the region. This could be attributed to ongoing challenges such as political instability, a weak regulatory environment, and infrastructural deficits, which deter larger investments (Ojera & Laker, 2022). The moderate growth in FDI not only reflects the potential for regional integration to boost investment flows but also highlights the need for South Sudan to address these internal barriers to further enhance its attractiveness as an investment destination.

Table 3 highlights significant progress in reducing NTBs between South Sudan and other EAC member states between 2020 and 2024. Over this period, the number of reported NTBs decreased from 15 to 10, reflecting a 33% reduction. Similarly, the average cost increases attributable to NTBs dropped from 12% to 7%, while trade disruption days decreased from 45 to 34, representing a 24% improvement. These improvements indicate that the EAC's efforts to streamline trade processes and mitigate trade impediments are yielding results. For South Sudan, these changes have likely facilitated modest trade flows, reduced transaction costs, and improved the predictability of cross-border trade.

**Table 3. Impact of Non-Tariff Barriers (NTBs) on Trade Between South Sudan and EAC Member States, 2020-2024**

| Year | Number of Reported NTBs | Average Cost Increase Due to NTBs (In %) | Trade Disruption Days (Days) |
|---|---|---|---|
| 2020 | 15 | 12 | 45 |
| 2021 | 14 | 10 | 40 |

| | | | |
|---|---|---|---|
| 2022 | 12 | 9 | 38 |
| 2023 | 11 | 8 | 36 |
| 2024 | 10 | 7 | 34 |

Source: Kithinji & Nganga, 2024

The reduction of NTBs between South Sudan and other EAC member states has significant implications for production. Enhanced market access has likely allowed producers to expand their reach into regional markets, capturing larger market shares. This is particularly vital for agriculture, forestry, and livestock sectors, which dominate South Sudan's economy. The lower NTB-related costs, declining from 12% to 7%, also translated into reducing input and logistical expenses. This improvement enhances the competitiveness of South Sudanese goods, providing opportunities for increased production and profitability. In addition, the reduction in the trade disruption days, from 45 to 34, minimizes supply chain delays. This improved efficiency ensures timely delivery, reduces storage costs, and limits spoilage, particularly for perishable goods. Several areas, however, require further exploration to optimize the benefits of these improvements. Understanding how sector-specific impact varies is essential to prioritizing interventions. Informal traders, who play a crucial role in cross-border trade, must also be examined to ensure equitable benefits. Moreover, the sustainability of NTB reductions must be assessed to determine if they are enduring or policy dependent. Despite progress, significant barriers remain, and untapped trade potential calls for further measures to unlock broader economic benefits and production growth. As Teshome (2023) notes, addressing NTBs is essential, but further reforms are needed to enhance South Sudan's capacity to compete in the regional markets and achieve sustainable economic gains.

Overall, while South Sudan's engagement with the EAC has yielded some economic benefits, particularly through increased trade and investment flows, significant challenges remain. These include a persistent trade deficit, limited FDI inflows, and structural barriers that undermine South Sudan's ability to fully benefit from regional integration. The results underscore the need for targeted policy interventions to address these challenges and enhance South Sudan's economic competitiveness within the EAC.

## 5. Discussion and Conclusion

This study reveals both opportunities and ongoing challenges in South Sudan's trade relationship with the EAC. The persistent trade deficit between 2020 and 2024 demonstrates the country's reliance on imports, especially from more industrialized EAC member states such as Uganda and Kenya, and its limited export capacity. Despite the slight growth in exports from $120 million to $150 million, South Sudan has been unable to offset the rising import bill, which has deepened its trade imbalance. This aligns with Nyang'au's (2023) assessment of South Sudan's dependence on external goods due to weak industrial development and structural barriers, including inadequate infrastructure.

While South Sudan has struggled with internal challenges, the structure of regional trade agreements also plays a role in the uneven distribution of benefits within the EAC. Mwangi et al. (2022) argue that South Sudan's late entry into the EAC, coupled with political instability, has inhibited its ability to capitalize on regional opportunities. The study's FDI findings support this argument, showing that although FDI inflows from EAC countries grew modestly from $45 million in 2020 to $65 million in 2024, the investment levels remain low compared to other EAC states, reflecting, among others, the difficult investment environment in South Sudan. Political uncertainty and weak governance continue to deter investors, as highlighted by Ojera and Laker (2022).

To conclude, the study presents the complex trade dynamics between South Sudan and the EAC, highlighting the need for more comprehensive internal economic reforms. The persistent trade deficit, low export capacity, and structural impediments such as inadequate infrastructure and political instability continue to restrict South Sudan's potential to leverage regional integration for economic growth. While the FDI inflows and reductions in NTBs represent positive steps, these gains are insufficient to address the deeper economic issues that hinder South Sudan's full participation in the EAC. To achieve meaningful economic progress, South Sudan must focus on diversifying its economy, improving its domestic production capacity, and creating a conducive environment for investment. Without these targeted interventions, the country risks falling further behind its EAC peers in benefiting from regional trade and economic cooperation. In this respect, the following, more detailed policy recommendations are in order:

*1. Strengthening Domestic Production Capacity*

South Sudan should invest in infrastructure and support small and medium enterprises (SMEs) to diversify its economy. Enhancing the capacity of domestic industries will reduce reliance on imports and improve export performance.

*2. Enhancing Trade Facilitation*

Continued efforts to streamline border procedures and reduce NTBs are essential to improving trade efficiency. South Sudan should collaborate closely with other EAC member states to harmonize trade regulations and strengthen customs infrastructure. Capacity-building programs for customs officials and traders could help address remaining challenges, facilitating smoother trade flows across borders

*3. Attracting and Diversifying FDI*

To attract more FDI, South Sudan needs to focus on improving political and macroeconomic stability as well as governance, creating a secure and predictable investment environment. Beyond oil, South Sudan should diversify investment into sectors such as agriculture, infrastructure, and services. This will foster sustainable economic growth and create broader opportunities for economic stabilization, resilience, and growth

*4. Promoting Regional Partnerships*

Strengthening economic partnerships with other EAC member states through joint ventures, trade agreements, and regional development projects can help South Sudan mitigate competitive disadvantages. Such collaboration should align with South Sudan's strategic priorities and aim to build long-term economic resilience

*5. Implementing Policy Reforms and Improving Economic Governance*

Comprehensive reforms in trade policy, investment regulations, and public financial management are necessary to enhance South Sudan's economic governance. Improved governance will not only stabilize the economy but also build investor confidence, which is critical for sustained economic growth and integration into the EAC.

Addressing these key areas could strengthen South Sudan's economic position within the EAC, improve trade performance, and create a more stable and prosperous future.

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**Authors' Biography**

Bec George Anyak is a researcher with expertise in policy formulation and analysis, trade policy, budgeting, business planning, and development strategy. He also serves as a Lecturer of Economics at Upper Nile University, South Sudan. Bec earned his Bachelor of Economics from the University of Nairobi in Kenya and an MSc in Applied Economics from the University of Strathclyde in Glasgow, UK. He is current Deputy Minister of Finance and Planning, South Sudan. Previously, Bec held senior positions, including as the State Minister of Finance in the now-defunct Eastern Lakes State Government and as a Commissioner for Yirol West County, Lakes State. His extensive experience in both academic and governmental sectors underscores his commitment to improving economic policy and development in South Sudan.