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Report Name: The COMESA EAC SADC Tripartite Free Trade Area Update

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Prepared By: Allan Kimitei

Approved By: Bret Tate

Report Highlights:

The East African Community (EAC) has begun implementing preferential tariff treatment for qualifying goods from Southern African Customs Union (SACU) countries under the COMESA–EAC–SADC Tripartite Free Trade Area (TFTA). Legal Notice No. EAC/138/2026, issued on May 22, 2026, covers eligible SACU-originating goods entering seven EAC markets (excluding Tanzania) and establishes Tariff Rate Quotas (TRQs) for specified beef products from Botswana and Namibia. The new preferences create different tariff conditions for SACU and non-TFTA suppliers, with implications for U.S. agricultural products currently exported to EAC markets and for U.S. products with future market potential.

Background

The COMESA–EAC–SADC Tripartite Free Trade Area (TFTA) brings together 29 countries across Eastern and Southern Africa through three regional economic communities: the Common Market for Eastern and Southern Africa (COMESA), the East African Community (EAC), and the Southern African Development Community (SADC) to reduce trade barriers and expand market access through the progressive elimination of tariffs on qualifying goods. The TFTA entered into force in July 2024 following the required ratifications, and participating countries are now working to operationalize tariff commitments, rules of origin, and other market-access provisions. The EAC's implementation of preferential tariff treatment for qualifying goods from Southern African Customs Union (SACU) members represents one step in this process. SACU comprises Botswana, Eswatini, Lesotho, Namibia, and South Africa, which maintain significant agricultural production and export capacity in commodities relevant to EAC markets.

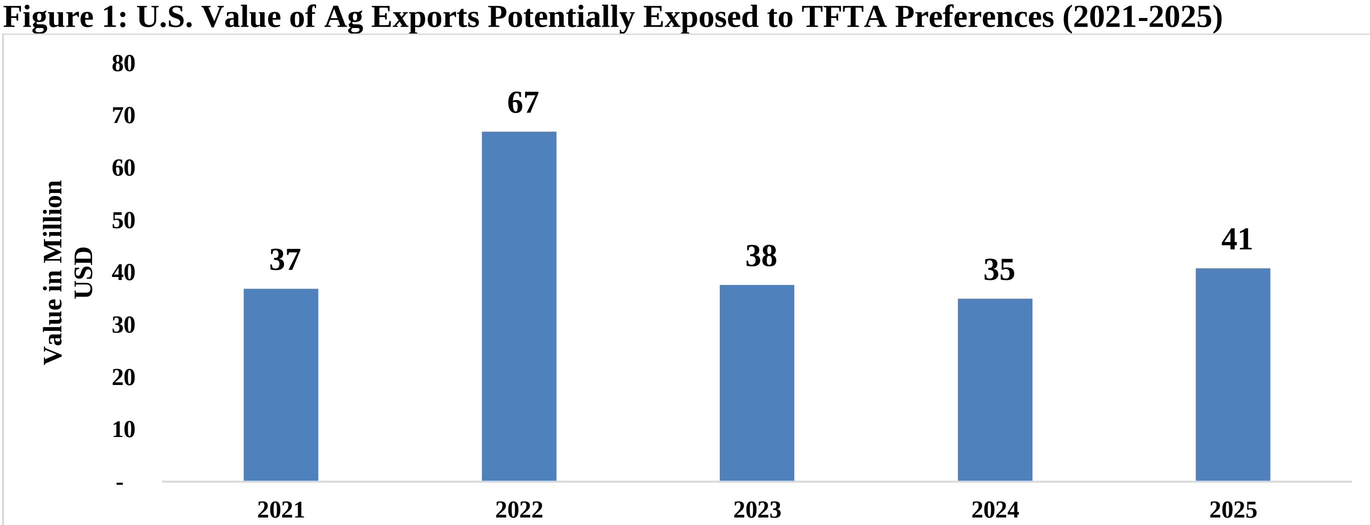
EAC Implementation of TFTA Preferences

On May 22, 2026, the EAC issued Legal Notice No. EAC/138/2026, implementing preferential tariff treatment for qualifying goods originating from SACU member states entering Burundi, the Democratic Republic of Congo, Kenya, Rwanda, Somalia, South Sudan, and Uganda. The measure applies to goods that meet the TFTA rules of origin, with preferential rates specified in the accompanying tariff schedule.

The notice also establishes TRQs for specified beef products originating from Botswana and Namibia under HS Codes 0201.20.00, 0201.30.00, 0202.20.00, and 0202.30.00. The EAC will administer the quotas on a first-come, first-served basis, with quantities exceeding the specified quotas subject to the EAC Common External Tariff.

U.S. exports of agricultural products covered by the EAC–SACU tariff concessions totaled $40.9 million in 2025, compared with $36.9 million in 2021 **(Figure 1).** Exports reached a five-year high of $66.9 million in 2022 before declining in subsequent years. The data indicate that U.S. suppliers have an existing commercial presence in product lines covered by the concessions, although the value of trade varies considerably across markets and products.

Figure 1: U.S. Value of Ag Exports Potentially Exposed to TFTA Preferences (2021-2025)



Source: Trade Data Monitor, LLC

U.S. exporters face varying levels of exposure across the affected product lines. Several products already generate significant U.S. sales in EAC markets compared with SACU suppliers, while SACU suppliers hold strong positions in others **(Figure 2)**. The impact on U.S. suppliers will vary by commodity as SACU tariff rates decline during the implementation period.

Figure 2: Top 10 Selected Agricultural Products with U.S. Trade Exposure

Product	HS Code	Value of U.S. Exports in $	Value of SACU Exports in $	Current EAC Tariff	SACU Rate Differential			
		2025	2025		**Y1**	**Y2**	**Y3**	**Y4**
Sorghum	100790	**14,149,269**	19,749	**25%**	20%	15%	10%	5%
Sauces	210390	**11,808,890**	5,879,627	**35%**	20%	15%	10%	5%
Malt extract	190190	**6,811,854**	9,562,507	**10%**	8%	6%	4%	2%
Lentils	071340	**6,152,023**	649	**25%**	20%	15%	10%	5%
Bulgur wheat	190430	**715,775**	1,087	**25%**	20%	15%	10%	5%
Kidney beans	071333	**333,553**	10,852	**35%**	20%	15%	10%	5%
Cocoa	180690	**193,923**	1,418,074	**35%**	20%	15%	10%	5%
Cranberries	200893	**184,500**	163	**25%**	20%	15%	10%	5%
Wine of fresh grapes	220421	**101,684**	21,043,114	**35%**	20%	15%	10%	5%
Almonds	080212	**88,979**	6,167	**35%**	20%	15%	10%	5%

Source: Trade Data Monitor, LLC

The data shows that the competitive effect of the tariff concessions differs across product lines and EAC markets. Product lines with substantial U.S. exports and established SACU supply represent existing competitive relationships that could be affected as SACU preferential rates decline. Other products record significant U.S. exports but limited SACU trade, indicating less direct competition at present. Differences in demand elasticity, product quality, specifications, availability, and established supplier relationships may also influence sourcing patterns and determine the extent to which importers respond to the tariff advantage.

The five-year tariff schedule will progressively change the relative tariff treatment of SACU and non-TFTA suppliers as preferential rates decline for many affected products. This reduction will widen the tariff differential with U.S. products where U.S. tariffs remain unchanged, although the magnitude will vary by commodity. The impact will be most relevant for products that combine substantial U.S. exports with established SACU supply. Other factors, including transportation costs, SPS requirements, product availability, and supplier competitiveness, will also shape market outcomes. U.S. exporters should therefore assess the concessions at the product and market level rather than view the TFTA preference as a uniform change across agricultural trade.

See below attached gazette notice on the schedule of tariff concessions for the SACU members under the tripartite free trade area issued on May 12th, 2026.

Attachments:EAC Vol. AT 1 NO. 12 MAY 2026.pdf