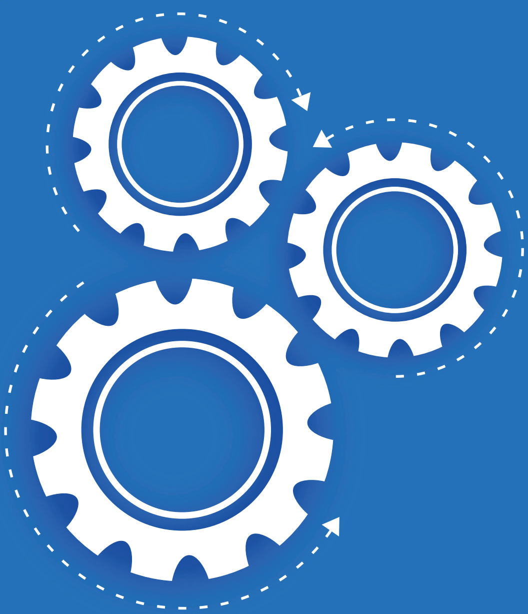
UNITED NATIONS
DR CONGO

# ACCELERATING THE DRC'S INTEGRATION INTO THE AFCFTA

## Lessons from Landlocked Countries and Implications for the Doha Programme of Action (DPoA)



# 1. Executive Summary

In 2026, the Democratic Republic of the Congo (DRC) stands at a pivotal moment in its economic history. Classified among the world's least developed countries (LDCs) by the United Nations, the country embodies a striking paradox: it holds 55% of the world's known cobalt reserves and accounts for 74% to 76% of global mine production of the mineral (USGS, 2025; AfDB, 2025), yet its integration into regional trade networks remains among the weakest on the African continent.

Three structural realities shape this trajectory. Transport costs are excessively high, ranging from 30% to 45% of the value of goods in landlocked provinces, compared with 8% to 12% in comparable emerging economies (World Bank, 2023). Export earnings are heavily concentrated in the mining sector, which generates over 90% of total revenue. Compounding both constraints, persistent insecurity across parts of the eastern DRC continues to fragment markets and undermine the reliability of transit corridors.

The African Continental Free Trade Area (AfCFTA) and the Doha Programme of Action for the Least Developed Countries (DPoA 2022–2031) together provide a strategic framework for addressing these impediments. Three operational priorities emerge as decisive: modernising key multimodal corridors (the Lobito corridor to the Atlantic Ocean, the Matadi–Kinshasa axis, and the central corridor to the Indian Ocean via Lake Tanganyika and Dar es Salaam) within a green corridor, low-carbon approach; scaling up trade facilitation through digital customs systems and one-stop border posts (OSBPs); and mobilising concessional and climate finance from multilateral development banks.

**Call to Action:** A coordinated political decision must be taken in 2026 to include the Lobito Corridor and the Kasumbalesa border post among the flagship projects of the National Strategic Development Plan (NSDP) and the national investment budget.

# 2. Background and Rationale

Since entering into force in January 2021, the AfCFTA has emerged as one of the most transformative initiatives under the African Union's Agenda 2063. Its central ambition is to reverse the persistent inward orientation of African continental trade: in 2022, intra-African exchanges accounted for barely 15% of the continent's total exports, compared with more than 60% in Europe and Asia (ECA, 2023)[1] .

The foregone gains from this integration deficit are estimated at approximately USD 22 billion per year for African economies as a whole. The agreement seeks to recover those losses through the progressive elimination of tariffs, the harmonisation of trade regulations, and the deeper embedding of member States in regional value chains (ECA, 2023; World Bank, 2020).

The DRC's position within this dynamic is both distinctive and consequential. Although the World Bank classifies it as a lower-middle-income country, the DRC appears on the United Nations list of least developed countries (LDCs); a status that determines its eligibility for the Doha Programme of Action (DPoA 2022–2031) and the concessional support mechanisms attached to it (United Nations, 2022). That designation reflects structural vulnerabilities that per capita income figures alone fail to capture severe infrastructure deficits, fragmented domestic markets, weak economic governance, and recurring exposure to external shocks.

Geographically, the country occupies a remarkable position at the crossroads of Central, Eastern, and Southern Africa, traversed by the world's second most powerful river and bordered to the east by the Great Lakes. Several provinces, particularly in the east and centre, nonetheless remain poorly connected to formal trade corridors (World Bank, 2023). Persistent insecurity across parts of eastern DRC (covering North Kivu, South Kivu, and Ituri) compounds those structural bottlenecks by disrupting the movement of goods, eroding the reliability of transit routes, and discouraging private investment.

The national economy, moreover, remains locked into narrow sectoral specialisation. Copper and cobalt together accounted for more than 90% of export earnings and approximately 42% of government revenue in 2023 (IMF, 2023; AfDB, 2024). The collapse of cobalt prices from USD 82,000 per tonne in 2022 to below USD 22,000 in early 2025 (USGS, 2025) illustrates with stark clarity the macroeconomic volatility inherent in concentrated commodity dependence.

Against this backdrop, the convergence of the AfCFTA and the DPoA offers a strategic framework grounded in two complementary

[1] The 15% figure refers to 2022 data from ECA. Estimates range between 13% and 16% depending on the methodology applied (UNCTAD, 2022; ECA, 2023).

logics: the continental ambition of a more integrated Africa, and the international commitment to supporting the world's most vulnerable economies

### Challenges to Regional Integration in the DRC

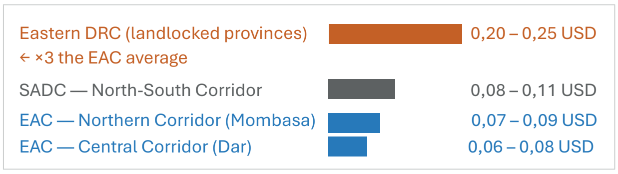
**Infrastructure and Connectivity**: The DRC's geography endows it with considerable logistical potential. Yet the principal corridors linking production zones to regional markets and seaports (including the Katanga axis to the Atlantic Ocean via the Lobito corridor, the river connections of the Congo Basin, and the eastern routes to the Indian Ocean) are afflicted by chronic bottlenecks, insufficient capacity, and a pattern of deferred maintenance documented across multiple institutional audits (World Bank, 2023).

**Trade facilitation**: The Kasumbalesa border post, the primary crossing point for mineral exports, processes approximately 1,000 trucks per day (World Bank, 2020). Recurring congestion at that crossing generates transit delays of three to seven days per convoy, a figure three to seven times higher than the benchmarks recorded at modernised border posts in East Africa (ODI, 2021). The inauguration of the Kazungula Bridge between Zambia and Botswana in 2021 demonstrated that modern border infrastructure, paired with coordinated procedures, can reduce transit times by more than 40% within two years (AfDB, 2021). In April 2025, SADC convened an inter-State ministerial meeting to address the persistent challenges at Kasumbalesa, reaffirming the need for a corridor-wide approach that integrates customs, infrastructure, security, and immigration management (SADC, 2025).

**Territorial fragmentation and internal geographic isolation**: Covering 2.34 million km$^2$, the DRC suffers from multimodal connectivity deficits that deepen the isolation of vast portions of its territory. The Congo River and the Great Lakes, despite their considerable potential as natural transit waterways, remain significantly underutilised owing to inadequate port infrastructure and the absence of modernised river logistics systems (World Bank, 2021). That internal fragmentation manifests in transport costs that significantly undermine national economic competitiveness.

As Figure 1 below illustrates, average costs in eastern DRC range between USD 0.20 and USD 0.25 per km per tonne, roughly three times the averages recorded on East African Community (EAC) corridors, where equivalent costs fall between USD 0.06 and USD 0.09 per km per tonne (AfDB, 2022; World Bank, 2021–2023; EABC–TMEA, 2022; SADC, 2023)[2].

**Figure 1: Average transport cost (USD per km per tonne): Eastern DRC versus EAC and SADC corridors**




*Source: AfDB (2022); World Bank (2021–2023); EABC–TMEA (2022); SADC RIDMP (2023). Harmonised estimate based on data from distinct institutional sources. Values are indicative orders of magnitude. The low and high ends of each range are drawn from individual source reports.*

**Commodity dependence and limited diversification**: Mining accounted for more than 90% of export earnings and contributed 39% of national GDP in 2023 (AfDB, 2024; IMF, 2023). Agriculture, with some 80 million hectares of arable land available (FAO, 2022), remains the country's most immediate and most underutilised diversification driver. Unlocking that potential calls for coordinated investment in rural infrastructure, agri-food logistics, and rural financial services. Severe as these constraints are, they do not constitute insurmountable barriers. The convergence of the AfCFTA framework and the Doha Programme of Action opens precisely the operational space required to address them, provided the DRC brings to that opportunity the political resolve and strategic coherence the situation demands.

## 3. Opportunities under the AfCFTA and the Doha Programme of Action

### The AfCFTA: An expanded market and a regional industrialisation dynamic

The world's largest cobalt producer, the DRC accounted for 74% to 76% of global mine production of the mineral in 2023–2024 and holds 55% of all known reserves (USGS, 2025; AfDB, 2025). Within the AfCFTA framework, that position opens substantial prospects for industrial upgrading: refining, intermediate processing, and assembly operations, rather than remaining confined to the export of unprocessed ores[3]. Simulations suggest

[2] These figures result from the aggregation of data drawn from distinct institutional sources (AfDB, World Bank, EABC–TMEA, SADC) and should be read as indicative orders of magnitude. A standardised field survey would allow for more consolidated estimates.

[3] In 2023, virtually all cobalt extracted in the DRC was exported in raw or semi-processed form to China, which controls approximately 65% of global refining capacity (USGS, 2025; AfDB, 2025). Industrial upgrading presupposes substantial investment in refining capacity and an explicit

that a reduction in logistics costs of at least 20% could support a material increase in non-mining exports over the medium term, although those projections remain conditional on the adoption of accompanying policy reforms (ECA, 2023; World Bank, LPI 2023).

Beyond the mining sector, regional demand for processed food products is growing at more than 3% per year through to 2030 (FAO, 2022). That trend opens commercial outlets for cross-border agri-industrial value chains, particularly along the corridors connecting the DRC to the United Republic of Tanzania via Lake Tanganyika and to Uganda in the Great Lakes region. A third competitive driver lies in the services sector: logistics, telecommunications, and financial services collectively account for approximately 47% of African GDP (ECA, 2022), and their progressive liberalisation under the AfCFTA could meaningfully reduce transaction costs across the region.

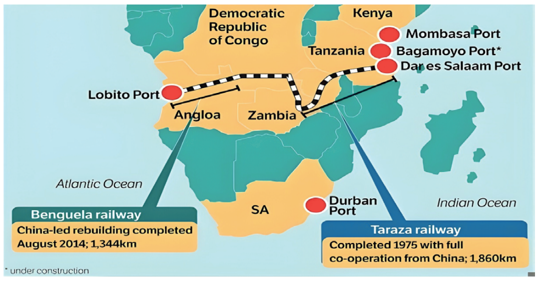
### The Doha Programme of Action: A structured framework for infrastructure and resilience

The Doha Programme of Action for the Least Developed Countries (DPoA 2022–2031) provides an operational framework built around five priorities directly relevant to the DRC: infrastructure and connectivity development, structural economic transformation, trade facilitation, resilience strengthening, and the mobilisation of sustainable finance (United Nations, 2022). Annual requirements for resilient, climate-compatible infrastructure investment across Africa are estimated at between USD 130 billion and USD 170 billion through to 2030 (AfDB, 2023)[4], creating the conditions for a green corridor strategy capable of attracting climate finance to complement traditional concessional lending.

### Towards green corridors: logistical competitiveness and climate commitments

Upgrading transport infrastructure without incorporating environmental sustainability imperatives would mean reproducing an already outmoded development model. Green corridors, multimodal routes that prioritise rail and river transport while embedding resilience criteria into their design, offer a coherent response to both requirements at once. The Congo River, Lake Tanganyika, and the Lobito Corridor together constitute a natural platform for developing decarbonised logistics chains aligned with the DRC's climate commitments and eligible for financing under the Green Climate Fund (GCF).

Multi-stakeholder regional cooperation is indispensable along four geographic axes: to the south, with Angola and Zambia within the Lobito corridor framework; to the east, with the United Republic of Tanzania via the central corridor and Lake Tanganyika; to the north-east, with Uganda and the Great Lakes region; and to the west, with the Republic of the Congo via the river corridor of the Congo Basin. SADC, the Economic Community of Central African States (ECCAS), COMESA, and the EAC represent the natural multilateral frameworks for coordinating these efforts.




*An illustration of the Lobito corridor. © Procurement.co.ug*

## 4. Lessons from Landlocked Developing Countries (LLDCs)

The experience of African countries that have grappled with geographic isolation offers empirical lessons directly applicable to the DRC's situation. Three national trajectories stand out for the clarity and measurability of their outcomes..

**Comparative table: Lessons from landlocked developing countries**

| Country | Strategic approach | Measured impact | Lesson for the DRC |
|---|---|---|---|
| **Ethiopia** | Addis Ababa–Djibouti corridor (electrified railway, 752 km) | Transit time reduced sixfold: from three days to 12 hours by rail | Prioritise Lobito as the pilot corridor and secure robust bilateral agreements |
| **Zambia** | Kazungula Bridge and one-stop border post (North-South Corridor) | Costs reduced by 30%; crossing time cut to under 30 minutes | Modernise Kasumbalesa and establish a cross-border one-stop border post |
| **Uganda** | One-stop border posts at Malaba and Busia (Mombasa Corridor) | Transit times cut by 20% to 30%; significant reduction in transit costs | Draw on EAC best practices: digital customs systems and regulatory harmonisation |

[4] The estimate of USD 130 billion to USD 170 billion per year (AfDB, 2023) refers to the African continent as a whole. Disaggregated figures for Central Africa or the DRC specifically are not available in the sources consulted.

Three cross-cutting lessons emerge from these trajectories:

First, the strategic concentration of investment on a limited number of backbone corridors maximises short-term economic impact.

Second, formalising cross-border cooperation through legally binding bilateral agreements is a prerequisite for the operational viability of any corridor.

Third, digitalising customs procedures and systematically rolling out one-stop border posts together constitute the single most cost-effective trade facilitation tool available, with measurable results achievable within 18 months of implementation.

Taken together, these three drivers could reduce logistics costs by 20% to 40% and support a significant increase in non-mining exports by 2035 (ECA, 2023; World Bank, 2022).

**Illustrative Case Studies**

***The Lobito Corridor: a new trade geography for the DRC***

*In July 2023, the Lobito Atlantic Railway (LAR) consortium, comprising Trafigura, Mota-Engil, and Vecturis, secured a 30-year concession for the operation of the Benguela railway (1,300 km). A joint financing package of USD 753 million was finalised in December 2024, comprising USD 553 million from the United States International Development Finance Corporation (DFC) and USD 200 million from the Development Bank of Southern Africa (DBSA), to fund the rehabilitation of the railway line and the modernisation of the port of Lobito (DFC, 2024; AFC, 2025).*

*Once fully operational, the corridor is projected to carry 4.6 million tonnes of freight per year, representing a tenfold increase over current capacity, with an estimated 30% reduction in transport costs for critical minerals. Transit time between the Copperbelt and Lobito is expected to fall from 45 days by road to approximately 48 hours by rail.*

***Key strategic observation**: This corridor demonstrates the DRC's capacity to diversify its logistics pathways in a context of intensifying geopolitical competition for control over critical mineral supply chains.*

***Ethiopia via Djibouti : when a priority corridor reshapes trade geography***

*Since 1993, Ethiopia has routed approximately 95% of its foreign trade through the port of Djibouti (World Bank, 2020). The two countries subsequently modernised the Addis Ababa–Djibouti corridor along 752 km, inaugurating in 2018 an electrified railway line that reduced transit times from three days to approximately 12 hours.*

***Key strategic observation:** This case demonstrates that a well-designed priority corridor, underpinned by robust bilateral agreements, can convert a geographic constraint into a lasting competitive advantage. The lesson applies directly to the relationship between the DRC and Angola within the Lobito Corridor framework.*

## 5. Strategic Recommendations for the DRC

The five priority areas outlined below summarise the operational agenda for the period 2026–2030.

| Priority area | Key actions |
|---|---|
| **1. National policy coherence** | Include the Lobito Corridor and the Kasumbalesa border post in the NSDP and the national investment budget. Concentrate resources on three strategic corridors: Lobito, Matadi–Kinshasa, and the central corridor to Dar es Salaam. |
| **2. Regional cooperation and integration** | Formalise bilateral trade facilitation agreements with Angola, Zambia, the United Republic of Tanzania, Uganda, and the Republic of the Congo. Strengthen coordination within SADC, ECCAS, COMESA, and the EAC. |
| **3. Green corridor financing** | Mobilise concessional and climate finance (AfDB, World Bank, GCF, AFC, EIB) for resilient, low-carbon multimodal corridors. Integrate rail, river transport, and modernised border posts into a single infrastructure investment framework. |
| **4. Trade facilitation and digitalisation** | Establish one-stop border posts (OSBPs) at Kasumbalesa, Kasindi, and Uvira. Deploy electronic customs clearance platforms fully interoperable with regional systems. |
| **5. Inclusive integration into value chains** | Develop capacity-building programmes for SMEs, women, and young people covering sanitary and phytosanitary (SPS) standards, certification procedures, and e-commerce. Establish dedicated facilitation windows in special economic zones and free trade zones. |

## 6. Conclusion

The DRC enters 2026 carrying a striking structural paradox: it holds a decisive share of the mineral resources essential to the global energy transition, yet remains among the least integrated economies in African continental trade. Narrowing the gap between latent wealth and effective integration is neither a matter of favourable circumstances nor a question of fate. It is, rather, the outcome of deliberate, coherent, and sustained political commitment.

The AfCFTA and the Doha Programme of Action together provide a framework that is relevant at two complementary levels. One opens the market; the other finances the conditions for gaining access to it. Structured around five priority areas, the two frameworks together form the backbone of a credible strategy for 2026–2030: (i) priority multimodal corridors developed within a low-carbon green corridor approach; (ii) trade facilitation through digital customs systems and one-stop border posts; (iii) targeted mobilisation of concessional and climate finance; (iv) formalised regional cooperation with neighbouring countries; and (v) effective integration of SMEs, women, and young people into regional value chains.

These are not theoretical orientations. Ethiopia, Zambia, Uganda: the evidence from each country demonstrates that targeted political mobilisation can convert a geographic vulnerability into a competitive advantage in under a decade.

For the DRC, the time for prospective analysis has passed. What the moment demands is operational decision-making. Two foundational decisions must be taken in 2026: the inclusion of the Lobito Corridor and the Kasumbalesa border post among the flagship projects of the National Strategic Development Plan (NSDP) and the national investment budget; and the establishment of an interministerial coordination mechanism endowed with a clear mandate, a roadmap, and dedicated resources for implementing the AfCFTA–DPoA strategy.

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