



Unlocking New Growth Drivers and Practicing Long-Termism

Chinese Investment in Africa
2026

China-Africa Business Council



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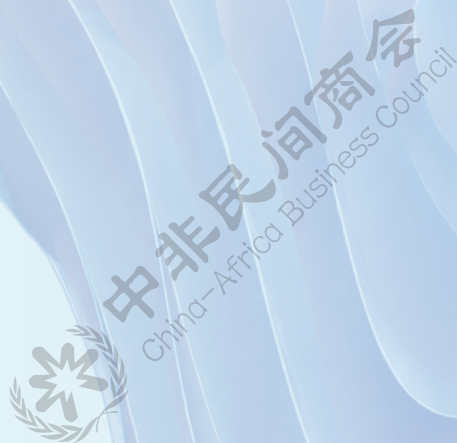
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Unlocking New Growth Drivers and Practicing Long-Termism:

Towards a Win-Win China-Africa Partnership for Modernization
China Investment in Africa 2026



Preface

Embracing the Tide of Our Times through Long-Termism: Building a Win-Win Path to Modernization for China and Africa

2026 is a year of extraordinary significance. It marks the 70th anniversary of the establishment of diplomatic relations between China and African countries and the 20th anniversary of the China-Africa Business Council (CABC). The 2026 edition of Chinese Investment in Africa is published as scheduled. It is both a practical review of the achievements of Chinese enterprises deeply engaged in China-Africa cooperation and a sincere tribute to their efforts. At the same time, it looks beyond the present uncertainties towards the long term, offering forward-looking guidance for the road ahead.

Twenty years ago, CABC was established with a commitment to South-South cooperation. Over the past two decades, we have remained committed to the principles of “Cultural Respect · Responsible Business · Win-Win Cooperation”. We have brought together more than 5,000 enterprises and institutions across over 50 African countries, building a two-way bridge for economic and trade exchanges through the strength of the private sector. Over these two decades, we have witnessed a historic transformation in Chinese investment in Africa, as generations of Chinese entrepreneurs have brought capital, technology, and a genuine commitment to the continent, putting down roots and growing alongside their African partners.

Looking across the world, competition and cooperation among major powers, industrial restructuring, and the sweeping wave of the AI revolution are reshaping Africa's development landscape. At the same time, China's comprehensive industrial strengths are deeply aligned with Africa's needs for industrialization, urbanization, and agricultural modernization. The implementation of zero-tariff policies is opening up new space for institutional opening-up. Four new drivers, green energy, e-commerce and payments, technology, and artificial intelligence, are rapidly gaining momentum and emerging as new growth engines for China-Africa cooperation. The 2026 report is therefore more than a collection of policies and case studies. It is also a guide to action, helping Chinese enterprises expanding overseas identify opportunities, manage risks, and pursue sustainable development, while offering a private-sector perspective to support greater policy coordination between China and Africa.

Twenty years of working together across continents and seventy years of enduring friendship between China and Africa have brought us to a new starting point. Building an all-weather China-Africa community with a shared future for the new era will depend on the concrete efforts of countless market players. We look forward to seeing more Chinese entrepreneurs make their way to this continent of immense promise, take a long-term approach and put

down lasting roots in African soil. May the entrepreneurs who read this report seize opportunities for development, remain committed to long-term value, promote shared prosperity through industrial collaboration, and build

enduring friendship through closer people-to-people ties. Together, we can broaden the bridge of private-sector trade and economic cooperation and write a new chapter in China-Africa cooperation.



Wu Yanming

Chairman of China-Africa Business Council (CABC)

Chairman of Wynca Group



China Offers Much to Learn From Whole-Process Cooperation Between Chinese and African Enterprises Matters

Seventy years after China and Egypt established diplomatic relations, I would like to see African productive capability occupy a much larger place in the China–Africa relationship. The roads, railways and power systems matter. So does what African firms can make with them, and how much of the knowledge and ownership stays in African hands.

I have spent much of my working life around African makers. The engineers winding transformers in Addis Ababa and the metalworkers in roadside workshops are part of an industrial base we too often overlook. They need reliable access to tools and components, customers willing to buy what they produce, and finance that gives them time to improve. Our ambitions for industrialization have to begin with people like these.

China offers much to learn from here. Its township and village enterprises, and later the manufacturing networks of Shenzhen, show what becomes possible when producers have suppliers and technical knowledge within reach. I am interested in how African firms can build those relationships and acquire the competence to develop products of their own.

The four themes of this edition of Chinese Investment in Africa, covering green industry, e-commerce and digital payments, technology, and artificial intelligence, deserve to be read with that question in mind. African manufacturers and entrepreneurs should help shape this

cooperation from the outset. They know where production gets stuck and what would allow their businesses to grow. Whole-process cooperation between Chinese and African enterprises matters.

As a consultant adviser to timbuktoo, the United Nations Development Programme's pan-African innovation initiative, I see the importance of connecting university research with enterprise and manufacturing. The AI UniPods, the ManuTech Hub in Addis Ababa, EDGE sovereign compute, and the Virtual AI Hub with its Thematic AI Labs are parts of this effort. I see scope for Chinese manufacturers, research institutes and investors to work with African firms, helping them move from prototypes into production and use artificial intelligence in their businesses.

I would judge these partnerships by the capabilities they leave behind. Can an African business progress from importing equipment to assembling it, making components and eventually selling its own products? Does it retain intellectual property and build direct relationships with customers? China's zero-tariff treatment for 53 African countries, in force since May, creates an opening. Firms will need the capacity to supply that market consistently.

I welcome the China-Africa Business Council's attention to these questions. My hope is that this report encourages partnerships in which African producers have a substantial stake and the means to grow.

Emeka Okafor

Emeka Okafor is an entrepreneur focused on building African enterprises and creating wealth through manufacturing and trade. He co-founded Maker Faire Africa and the TED Fellows Program. He advises UNDP's

timbuktoo initiative as a strategic consultant on innovation and technology and is developing a stealth startup focused on Africa-to-Asia trade.

The opinions expressed here are my own, offered in a private capacity, and do not represent the views or official positions of UNDP or the timbuktoo initiative.



Emeka Okafor

Strategic Innovation & Technology Lead

UNDP's timbuktoo



Abbreviations

5G	Fifth-generation Mobile Network
AEO	Authorized Economic Operator
AfCFTA	African Continental Free Trade Area
AfDB	African Development Bank
AGMS	Africa's Green Minerals Strategy
AGOA	African Growth and Opportunity Act
AI	Artificial Intelligence
API	Application Programming Interface
AU	African Union
B2B	Business-to-Business
BIT	Bilateral Investment Treaty
CABC	China-Africa Business Council
CADEPA	Framework Agreement on Economic Partnership for Shared Development
CADFund	China-Africa Development Fund
CAFIC	China-Africa Fund for Industrial Cooperation
CAPIPP	China-Africa Private Investment Promotion Platform
CKD	Completely Knocked Down
DFC	U.S. International Development Finance Corporation
DTA	Double Taxation Agreement
EPC	Engineering, Procurement and Construction
eVTOL	Electric Vertical Take-Off and Landing Aircraft
eWTP	Electronic World Trade Platform
FOCAC	Forum on China-Africa Cooperation
G20	Group of Twenty
GDP	Gross Domestic Product
GPT	Generative Pre-trained Transformer
GPU	Graphics Processing Unit
ICD	Inland Container Depot
IEA	International Energy Agency

LCTs	Low-carbon Technology Products
MIMO	Multiple-Input Multiple-Output
MMO	Mobile Money Operator
OECD	Organisation for Economic Co-operation and Development
OFDI	Outward Foreign Direct Investment
PEACE	Pakistan and East Africa Connecting Europe
POS	Point of Sale
PPA	Power Purchase Agreement
RSCT	Red Sea Container Terminal
SA	Standalone
SaaS	Software as a Service
SAIIA	South African Institute of International Affairs
SARA	International Exhibition of Agriculture and Animal Resources
SPS	Sanitary and Phytosanitary Measures
USSD	Unstructured Supplementary Service Data



Executive Summary

The year 2026 marks the 70th anniversary of the establishment of diplomatic relations between China and African countries, as well as an important year for the in-depth implementation of the FOCAC Beijing Action Plan (2025–2027). With China's comprehensive zero-tariff treatment for Africa formally taking effect, alongside the acceleration of green and low-carbon transition, digital adoption, and African regional integration, the sectors, models, and objectives of Chinese investment in Africa are undergoing significant change.

Focusing on the theme of “Unlocking New Growth Drivers and Practicing Long-Termism: Towards a Win-Win China-Africa Partnership for Modernization”, this report seeks to answer three key questions. First, how will market opening and institutional level cooperation shape China-Africa trade and investment and industrial chain coordination? Second, how will green, digital, and intelligent industries generate new momentum for investment in Africa? Third, how can Chinese enterprises, through a long-term approach, translate project investment into local employment, value creation, technology accumulation, and sustainable development outcomes?

Aims and Objectives

This report aims to systematically examine the emerging landscape and underlying dynamics of Chinese investment in Africa, to assess the market opportunities and institutional conditions created by China's full zero-tariff policy for African countries, to review corporate practices in green industries, digitalization, technology, and localization, and, on this basis, to propose policy recommendations for improving the quality, resilience, and sustainability of China-Africa investment cooperation.

To achieve these objectives, the report focuses on the following areas:

- Review the evolution of strategies and policies under FOCAC; identify changes in the scale and structure of China's investment in Africa; examine China-Africa cooperation needs in the context of intensifying geopolitical competition and the rise of artificial intelligence.
- Follow the expansion of China's zero-tariff policy for Africa and assess its effects on trade growth, trade structure, value-chain linkages, and supporting mechanisms.
- Analyze the current landscape and investment opportunities in key areas including green industries, e-commerce and digital payments, technology, and artificial intelligence.
- Draw lessons from industrial parks and corporate experience concerning job creation, local procurement, skills transfer, value-chain upgrading, and environmental and social governance.
- Develop actionable policy recommendations for governments, businesses, chambers of commerce and business associations, financial institutions, and international partners.

Methodology

The report draws on authoritative materials from multiple sources and employs primarily documentary research and case-study analysis. The documentary research covers, among other sources, policy documents, academic studies, statistical data from industry stakeholders, leading institutions, multilateral and regional financial organizations, international organizations, corporate materials, and other publicly available information. The corporate cases featured in the report are drawn primarily

from relevant public sources and a survey of member companies of the China-Africa Business Council. The enterprises represented span a range of sectors, including agriculture, energy and mining, infrastructure construction, manufacturing, the digital economy, and pharmaceuticals. Most are established enterprises with substantial market visibility and therefore offer relatively representative examples of China-Africa business cooperation.

Core Findings

The report highlights the following core findings:

1. Investment is expanding into a wider range of sectors. Chinese investment in Africa is extending beyond traditional infrastructure construction, resource development, and engineering contracting into clean energy, digital infrastructure, smart agriculture, new energy vehicles, advanced manufacturing, and modern services.
2. Cooperation models are becoming more integrated. Corporate engagement is evolving from product exports and project delivery towards integrated models combining investment, construction, operations, technology transfer, local procurement, and supplier development.
3. Market-opening benefits depend on supporting conditions. The impact of zero-tariff treatment will depend substantially on complementary arrangements covering rules of origin, product market access, inspection and quarantine, cold-chain logistics, cross-border payments and settlement, and market distribution channels.
4. Investment objectives are increasingly focused on long-term value. Job creation, local value-add, skills development, environmental performance, and community relations are becoming important dimensions

for evaluating project quality.

Policy Recommendations

- Maximize the benefits of zero-tariff treatment by improving market access, standards alignment, inspection and quarantine procedures, cold-chain logistics, cross-border settlement, and market channels.
- Strengthen investment in green, digital, and smart industries, ensuring that technology deployment translates into productive capacity and local innovation capabilities.
- Embrace long-termism by incorporating local employment, procurement, skills development, supplier development, environmental performance, and community relations throughout the project lifecycle.

Structure of the Report

Chapter 1 examines the emerging landscape, environment, and underlying dynamics of China-Africa investment cooperation.

Chapter 2 discusses China's full zero-tariff policy for African countries and its implications for China-Africa industrial value-chain cooperation.

Chapter 3 focuses on new investment drivers in areas such as green industries, e-commerce and payments, science and technology, and AI.

Chapter 4 draws on corporate cases to identify models for job creation, local value-add, and sustainable operations, while also discussing the rebuilding of the policy ecosystem.

The Conclusion and Outlook summarizes the report's main findings and presents recommendations for future cooperation.

01

A New Landscape and New Logic: Profound Changes in China-Africa Investment Cooperation

In September 2024, the 2024 Beijing Summit of the Forum on China-Africa Cooperation (FOCAC) elevated the overall positioning of China-Africa relations to an “all-weather China-Africa community with a shared future for the new era” and, for the first time, proposed that China and Africa jointly advance modernization. This marked the beginning of a new stage in China-Africa investment cooperation characterized by a reshaped landscape and new logic. The underlying drivers of China-Africa investment have shifted from the earlier focus on resource acquisition and development assistance, toward two-way

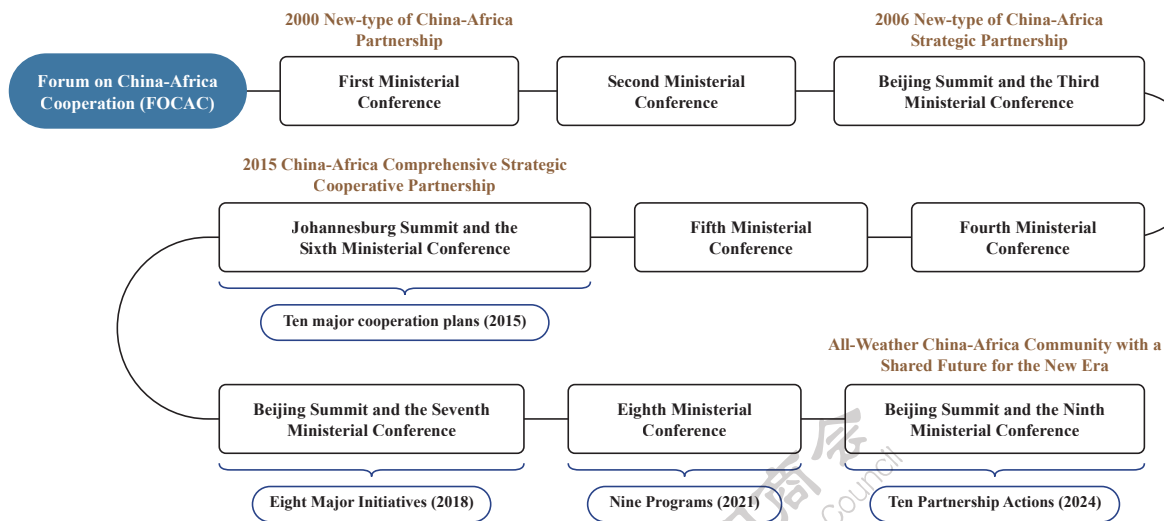
cooperation anchored in a modernization partnership and guided by long-term development. From an investment perspective, this chapter first reviews the evolution of strategies and policies under FOCAC, then examines the overall scale and structural changes of Chinese investment in Africa, and finally analyzes the historic convergence of three forces in the new stage: China's industrial strengths, Africa's development momentum, and changes in the global landscape. Together, these provide the broader context and analytical baseline for the report.

1.1 Evolution of Strategies and Policies under FOCAC

Since its establishment in 2000, FOCAC has become the most important institutional platform for collective dialogue and practical cooperation between China and Africa (see Figure 1). The upgrading of strategic positioning and

the development of policy frameworks under FOCAC have had a profound impact on China-Africa investment cooperation.

Figure 1 FOCAC Ministerial Conferences and Summits



1.1.1 Strategic Evolution: From a New Type of Partnership to a Community with a Shared Future

The progressive upgrading of the China–Africa relationship reflects, at the strategic level, both the expanding extent of bilateral cooperation and the changes taking place in the international environment. When FOCAC was established in 2000, the two sides defined their relationship as a “new-type partnership”. Its primary purpose was to replace fragmented bilateral exchanges with institutionalized dialogue and provide a platform for the economic and trade cooperation that was still at an early stage. During this period, Chinese investment in Africa remained limited in scale and focused mainly on resource exploration. At the 2006 Beijing Summit, the relationship was upgraded to a “new type of strategic partnership,” marking a shift from general economic and trade exchanges toward strategic cooperation of global significance. Dedicated platforms serving China’s investment in Africa, including the China-Africa Development Fund and economic and trade cooperation zones, were established to support Chinese investment in Africa. Investment consequently

began to evolve from individual projects towards more systematic and platform-based engagement. At the 2015 Johannesburg Summit, the relationship was further upgraded to a “comprehensive strategic and cooperative partnership”. The 2018 Beijing Summit expanded this framework by proposing the building of a closer “China-Africa community with a shared future”. Cooperation gradually extended beyond resources and infrastructure into manufacturing, industrialization, and other areas, with manufacturing investment accelerating significantly. At the 2024 Beijing Summit, the overall China–Africa relationship was elevated to an “all-weather China-Africa community with a shared future for the new era”. Bilateral relations between China and all the African countries with which it maintains diplomatic relations were simultaneously elevated to a strategic level. The focus of cooperation thus evolved progressively from dialogue to strategic partnership and ultimately towards a shared future.¹ The relative stability of bilateral relations and the predictability of the cooperation environment provide important support for investment, which is by nature a long-term activity. The successive upgrades in the China–Africa relationship have therefore been accompanied by corresponding

1. See the official website of the Forum on China-Africa Cooperation: <http://www.focac.org.cn/>.

expansion in the scale, models, and business sectors of Chinese investment in Africa.

The continued strengthening of bilateral ties has also been welcomed across Africa. Moussa Faki Mahamat, Chairperson of the African Union Commission, has highlighted the rapid development of China–Africa relations and expressed appreciation for China’s contributions to Africa over more than half a century in areas including infrastructure, health, energy, industry, and security. African leaders, including Rwandan President Paul Kagame, have publicly emphasized that China–Africa cooperation is based on equality, mutual respect and a shared commitment to mutual well-being. Kenya’s Nation newspaper described FOCAC as “a beautiful story of the two civilizations living harmoniously side by side as equal and mutually respecting partners”.² These signals indicate that China–Africa relations are moving beyond the traditional “donor–recipient” framework towards a modernization partnership based on equality and shared development. The practical experience accumulated through China’s modernization process is broadly aligned with the goals of continental integration and industrialization set out in the African Union’s Agenda 2063. Within the frameworks of Global South cooperation and South–South cooperation, the two sides share an emphasis on the primacy of development rights and opposition to the politicization of development issues. This convergence of principles provides an important foundation for the evolution of China–Africa investment cooperation in the new era. Investment is no longer simply a one-way transfer of capital and productive capacity. Instead, it is increasingly embedded in Africa’s own development agendas and serves as a collaborative process through which China and Africa pursue modernization together.

1.1.2 Policy Implementation: Delivering Deeper China–Africa Trade and Investment Cooperation

The upgrading of strategic relations requires effective implementation through appropriate policy instruments. To encourage and regulate investment in Africa, align bilateral and multilateral rules, and deliver on investment commitments made under FOCAC, China and African countries are building a multi-layered and mutually reinforcing policy framework.

1 Promoting and Regulating Outbound Chinese Investment

China’s current regulatory framework for overseas investment has established a model largely centered on filing and registration, supplemented by approval requirements and a negative-list system. As private enterprises now account for more than 70% of Chinese enterprises investing in Africa (and X% of Chinese investment), and African countries continue to strengthen regulatory requirements concerning the environment, labor, and local participation, the importance of compliance has risen substantially. In response, the National Development and Reform Commission, the Ministry of Commerce, and other government agencies have issued a series of regulatory guidelines, including the Guidelines for Enterprise Compliance Management of Overseas Operations, the Green Development Guidelines for Overseas Investment and Cooperation, and the Code of Conduct for Overseas Investment and Operations of Private Enterprises. These measures encourage Chinese enterprises investing in Africa to comply with applicable laws and regulations and proactively align their operations with the legal and regulatory requirements of

² See Embassy of the People’s Republic of China in the Federal Democratic Republic of Ethiopia (2024). Xi Jinping Meets with Chairperson of the African Union Commission Moussa Faki Mahamat. https://et.china-embassy.gov.cn/gnyw/202409/t20240903_11484076.htm; Belt and Road Portal (2018). Foreign Media: African Leaders Praise China’s Role in Africa and Reject the “Debt Trap” Narrative. <https://www.yidaiyilu.gov.cn/p/65420.html>; Belt and Road Portal (2024). FOCAC • High-Level Interview | FOCAC Beijing Summit to Inject New Momentum into Africa–China Relations — Interview with Rwandan President Paul Kagame. <https://www.yidaiyilu.gov.cn/p/0N40RSJ4.html>; Nation(2024). 2024 Focac summit takeaways, and what they mean for Africa. <https://nation.africa/kenya/blogs-opinion/opinion/2024-focac-summit-takeaways-and-what-they-mean-for-africa-4762448>.

host countries, as well as with expectations concerning green and low-carbon development and community responsibility. On the financial side, the China-Africa Development Fund and the China-Africa Fund for Production Capacity Cooperation use equity investment to leverage corporate investment and financing in Africa. China Development Bank and the Export-Import Bank of China provide dedicated loans for African projects, while China Export & Credit Insurance Corporation offers credit insurance against political and commercial risks in specific African countries. Together, these instruments form a comprehensive toolkit covering the financing and risk-management needs of Chinese investment in Africa across the project lifecycle.

2 Building Bilateral and Multilateral Rules and Institutional Arrangements

Institutional arrangements between China and Africa have continued to expand, while investment promotion mechanisms have steadily improved. As of May 2025, China had signed Bilateral Investment Treaties (BITs) with 34 African countries, Double Taxation Agreements (DTAs) with 21 African countries, and established investment and economic cooperation working groups with 14 African countries. These arrangements provide an important institutional and procedural foundation for higher-quality China-Africa investment cooperation. Meanwhile, 52 African countries and the African Union (AU) have signed memoranda of understanding with China on the Belt and Road cooperation, and other countries have subsequently signed more detailed cooperation plans.³ Africa has thus become one of the most important regions for Belt and Road cooperation.

Cross-border use of the renminbi (RMB) and the development of the China-Africa Cross-Border RMB

Center are also progressing steadily. In June 2026, the People's Bank of China authorized the Industrial and Commercial Bank of China and Standard Bank of South Africa to jointly operate as the "RMB Clearing Bank for Africa", establishing a cross-border RMB settlement channel covering 19 African countries. Together with measures such as China's support for African countries to issue Panda Bonds in China, these developments are gradually expanding the currency and capital-market channels for two-way investment and financing.

3 Implementing FOCAC Investment Commitments

Table 1 compares investment-related themes across successive FOCAC outcomes, with particular attention to investment, industry, industrial parks, and financing. Among the Ten Partnership Initiatives proposed at the 2024 FOCAC Beijing Summit, the Partnership Initiative for Industrial Chain Cooperation has the clearest investment focus. China thereby committed to developing industrial cooperation growth clusters in five African regions, supporting infrastructure and related facilities for 10 industrial parks, implementing an empowerment program for small and medium-sized African enterprises, jointly establishing a China-Africa Digital Technology Cooperation Center and 20 digital demonstration projects, and encouraging Chinese enterprises to invest at least RMB 70 billion in Africa. These commitments provide clear strategic guidance for Chinese enterprises seeking to expand collectively into African markets: industrial parks serve as the physical platforms, industrial value chains provide the backbone, and digitalization supplies an additional growth engine. As implementation mechanisms for FOCAC outcomes advance, associated projects are also being rolled out more rapidly. As a long-term investment and financing platform, the China-Africa Development Fund had, as of

3 See State Council Information Office of the People's Republic of China (2025). SCIO Holds Press Conference on the Fourth China-Africa Economic and Trade Expo and China-Africa Economic and Trade Cooperation. <http://www.scio.gov.cn/live/2025/36045/tw/>; State Council Information Office of the People's Republic of China (2024). SCIO Holds Press Conference on the Report on Belt and Road Cooperation between China and African Countries. <https://www.ndrc.gov.cn/xwdt/wszb/zfydy/fzbggyqk/>.

April 2026, made investment decisions totaling more than USD 9 billion across 39 African countries, leveraging over USD 36 billion in investment and financing by Chinese

enterprises in Africa.⁴ It has become an important hub for translating FOCAC investment commitments into action and connecting policy objectives with corporate activities.

Table 1 Investment-Related Themes in the Outcomes of FOCAC Meetings (Investment Perspective)

Item	Ten Major Cooperation Plans (2015, Johannesburg)	Eight Major Initiatives (2018, Beijing)	Nine Programs (2021, Dakar)	Ten Partnership Initiatives (2024, Beijing)
Industry and Industrialization	Industrialization placed first; industrial alignment and production capacity cooperation	Industrial promotion initiative; encourage greater investment in Africa	Investment promotion program; 10 industrialization and employment promotion projects	Partnership Initiative for Industrial Chain Cooperation; establish five regional growth hubs for industrial cooperation
Industrial Park Platforms	Jointly develop/upgrade industrial parks	Develop/upgrade economic and trade cooperation zones	China-Africa Belt and Road industrial parks	Provide assistance for supporting facilities in 10 industrial parks; establish pilot zones for in-depth economic and trade cooperation
Investment Commitments	Encourage enterprises to invest and establish businesses in Africa	Promote no less than USD 10 billion in investment in Africa over three years	China-Africa private investment promotion platform; no less than USD 10 billion in investment in Africa	Promote no less than RMB 70 billion in investment in Africa
Trade and Financing	USD 35 billion in concessional loans and export credits; increase the capital of the China-Africa Development Fund	USD 20 billion credit line; deepen financial cooperation, including local-currency settlement	USD 10 billion credit line for African financial institutions; China-Africa Cross-Border RMB Center	Zero tariffs on 100% of tariff lines; support panda bond issuance; local-currency settlement and fintech cooperation
Digital and Emerging Sectors	Information and communications network development	Promote e-commerce cooperation	Digital innovation program; Silk Road E-commerce cooperation	Jointly establish a China-Africa Digital Technology Cooperation Center; implement 20 digital demonstration projects

Source: Official documents released by successive FOCAC meetings.

⁴ China-Africa Development Fund (2026). News Update | China-Africa Development Fund Attends the Inaugural China-Africa Entrepreneurs Summit. https://mp.weixin.qq.com/s/u_CoeYE_KcD4Cs2msN_Oxw.

1.1.3 Province-Level Implementation: Building Distinctive Platforms for Cooperation with Africa

The effectiveness of China-Africa cooperation policies is underpinned by the coordination between national-level strategic planning in China and local-level implementation. Chinese provinces have developed specialized platforms for engagement with Africa based on their respective industrial strengths and comparative advantages. Hunan has taken the lead in piloting new forms of cooperation

through two national-level platforms, the China-Africa Economic and Trade Expo and the Pioneering Zone for In-Depth China-Africa Economic and Trade Cooperation. Guangdong has leveraged its strong trade links with Africa to expand industrial capacity cooperation. Zhejiang has extended digital trade channels through “Silk Road E-commerce.” Hubei is developing a China-Africa science and technology innovation hub, while Shandong has strengthened logistics support through overseas warehouses and port and shipping networks (see Table 2).

Table 2 Selected Provincial Platforms for China–Africa Cooperation and Recent Developments

Province	Main Platforms and Mechanisms	Selected Developments in 2025–2026
Hunan	China-Africa Economic and Trade Expo (permanently based in Changsha); Pioneering Zone for In-Depth China-Africa Economic and Trade Cooperation; China-Africa SPS Cooperation Information Website (developed by Changsha Customs); Pre-assessment System for African Foodstuffs Exported to China (the first of its kind in China)	① The Fourth China-Africa Economic and Trade Expo was successfully held in June 2025, with preliminary cooperation agreements worth more than USD 11 billion; ② In 2025, new forms of barter trade with Africa expanded to 10 countries, ranking first nationwide in both scale and growth rate; ③ In June 2026, China-Africa Economic and Trade Expo in Africa (Morocco) was launched, while Version 2.0 of the SPS Cooperation Information Website went online
Guangdong	"Two Centers and Four Platforms": China-Africa Cooperation Guangzhou Exchange Center and Guangdong China-Africa Trade Coordination Center; China-Africa Trade Legal Service Platform, Yunfei International Health Service Center, African Foreign Students Internship Base, and African Youth Entrepreneurship Base	① In 2025, trade with Africa exceeded RMB 300 billion, up 10.7% year on year; ② In May 2026, Guangzhou's "Two Centers and Four Platforms" were officially inaugurated; ③ At the 139th Canton Fair in May 2026, attendance by African buyers recorded notable growth
Zhejiang	Yiwu Cross-Border E-commerce Industrial Park; eWTP Global Innovation Center; Global Digital Trade Expo — African Digital Trade Day; “Belt and Road” China-Africa Cooperation Industrial Park; West Lake Summit on China–Africa Economy and Trade	① In November 2025, Zhejiang held its first Cross-Border E-commerce Import and Export Fair, covering emerging markets including Africa; ② In May 2026, the Chinese Brands Africa Global Launch event was held, during which the China-Africa Digital Intelligence Map for Brands Going Global was released; ③ Driven by the zero-tariff policy, imports from Africa increased by 33.7% year on year in May 2026

Hubei	China-Africa Innovation Cooperation Center China-Africa Geoscience Cooperation Centre	① In November 2025, the China-Africa Innovation Cooperation and Development Forum was held, resulting in 39 agreements and the launch of 23 service platforms; ② Hubei led the establishment of a technology transfer cooperation network involving 112 Chinese and African institutions; ③ The Forum was included in the Ministry of Foreign Affairs' List of Key Activities for 2026 China-Africa Year of People-to-People Exchanges
Shandong	China-Africa Joint Centers for Modern Agrotechnology Exchange, Demonstration and Training (Qingdao Agricultural University); "Ten Thousand Enterprises Going Global, Shandong Trade Worldwide" initiative; China (Qingdao) Private Enterprise Entrepreneurship Africa Seminar	① In January 2026, a new Yantai–Senegal shipping route to West Africa was launched; ② As of April 2026, Qingdao Port had a total of 11 container shipping routes to Africa; ③ In the first quarter of 2026, China-Africa breakbulk liner cargo services at Yantai Port exceeded 2 million tonnes in a single quarter for the first time, up 31.9% year on year

Source: Provincial government portals and publicly available reports.

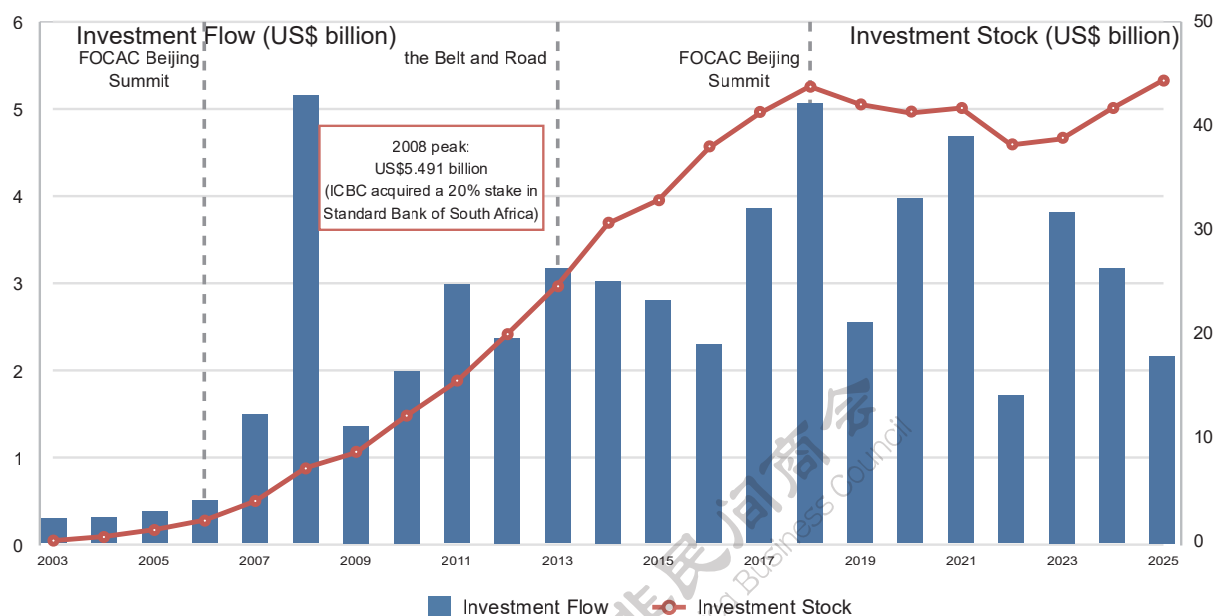
1.2 Scale and Structural Evolution of Chinese Investment in Africa

Since the establishment of FOCAC, Chinese investment in Africa has gone through a period of both rapid expansion and significant adjustment. This evolution reflects the internal needs of China's economic transformation and upgrading, and Africa's changing position within global value chains.

1.2.1 Investment Scale and Returns: Long-Term Growth amid Fluctuations and Strong Economic Returns

China's direct investment stock in Africa has expanded substantially over the past two decades (see Figure 2). At the end of 2003, China's direct investment stock in Africa was still below USD 500 million. Supported by the FOCAC framework and the Belt and Road Initiative, investment grew steadily, reaching a temporary peak of USD 46.1 billion around the time of the 2018 FOCAC Beijing Summit. After 2019, investment stock experienced a temporary correction amid the COVID-19 pandemic, rising geopolitical risks, the expiry of some projects and

withdrawal from others, and policy adjustments in host countries. By the end of 2025, the stock had recovered to USD 46.681 billion, keeping China among the four largest sources of foreign investment on the continent. Compared with the relatively steady accumulation of investment stock, annual investment flows have been considerably more volatile. Chinese investment flows to Africa amounted to only USD 75 million in 2003, before surging to USD 5.49 billion in 2008, driven in part by major transactions such as Industrial and Commercial Bank of China's acquisition of a stake in South Africa's Standard Bank. Investment flows subsequently fluctuated with global economic cycles, reaching US\$3.37 billion in 2024. Over the long term, from 2003 to 2024 Chinese investment flows to Africa recorded a compound annual growth rate of approximately 20%, following an overall upward trajectory marked by recurring fluctuations. Despite considerable volatility, the long-term growth trend remained clear.

Figure 2 Trends in China's Direct Investment Stock and Flows in Africa (2003–2025)⁵

Source: Ministry of Commerce of China, Statistical Bulletin of China's Outward Foreign Direct Investment, various years.

Beyond investment volume, the economic and social returns generated by investment also warrant attention. Studies show that Chinese outward foreign direct investment (OFDI) has a statistically significant positive impact on GDP growth in African countries. It also contributes to narrowing development disparities between African economies, and reducing regional inequality through convergence effects. Employment data further show that Chinese enterprises operating in Africa created a total of more than 1.1 million jobs between 2021

and 2024.⁶ The value of Chinese investment in Africa therefore extends beyond the accumulation of capital. It is increasingly reflected in tangible contributions to local economic growth and improvements in livelihoods. Most of these benefits accumulate and become visible over a period of several years, underscoring a broader shift in China's investment approach in Africa from shorter-term, opportunity-driven market entry towards long-term commitment, local integration, and sustained engagement in host markets.

⁵ Data notes: China established its outward foreign direct investment statistical system in 2002 and formally published the Statistical Bulletin of China's Outward Foreign Direct Investment 2003 (non-financial sector) in 2004. In 2006, China began compiling statistics on financial-sector OFDI, and in 2007 it published, for the first time, an all-sector statistical bulletin on outward foreign direct investment, making China's OFDI statistics more authoritative and comprehensive. Accordingly, this report presents China's direct investment stock and flows in Africa from 2003 onward.

⁶ See Guo, Tongze, Guanpeng Dong, Dongyang Yang, and Dexin Liu. (2025). "Chinese Investment Promoted Economic Growth While Reducing Inequality in African Countries." *Journal of Geographical Sciences* 35 (6): 1263–1285. <https://doi.org/10.1007/s11442-025-2366-8>; China-Africa Business Council (2025). *Chinese Investment in Africa 2025 Report: Building Integrated Features: China-Africa Investment and Africa's Regional Integration*. <https://www.cabc.org.cn/report-cn-2025.pdf>.

1.2.2 Investment Players: From State-Owned Enterprises to the Rise of Private Capital

As the scale of investment has expanded, the breakdown of Chinese investors in Africa has undergone a profound transformation, evolving from a model dominated by state-owned enterprises (SOEs) toward one in which SOEs and private enterprises advance in parallel, with private capital playing an increasingly prominent role. By the end of 2025, Chinese overseas enterprises had established a presence in 51 African countries and regions, equivalent to 85% of African countries and regions, with around 3,500 Chinese overseas enterprises operating in Africa.⁷ In 2025, Chinese enterprises' direct investment across all sectors in Africa reached USD 3.6 billion, up more than 40% year on year. Private enterprises accounted for more than 70% of all Chinese enterprises investing in Africa and were gradually becoming an important force in opening up African markets, particularly in manufacturing, wholesale and retail, the digital economy, and e-commerce. SOEs, drawing on their capital strength and engineering expertise, continue to undertake foundational and strategic projects in sectors such as energy, mining, and infrastructure. Private enterprises, meanwhile, leverage their greater flexibility and market responsiveness to fill gaps in consumer goods, light manufacturing, and digital services. With clearly differentiated but complementary strengths, the two groups are jointly shaping a new pattern of Chinese investment in Africa.

As a growing number of Chinese enterprises expand into African markets, industry associations are playing growing role in providing platforms and support services. The China-Africa Business Council (CABC), a national, non-profit business organization established with support from the United Nations and dedicated to promoting China-Africa economic and trade cooperation, has long provided support for private enterprises expanding into Africa. Its services currently cover more than 4,000

enterprises, with economic, trade, and investment activities spanning all 54 African countries. To date, it has facilitated more than US\$22 billion in investment and reinvestment in Africa. CABC has established country representative offices across Africa, creating a basic network that links its domestic and overseas services. Through key platforms and initiatives, including the China-Africa Private Investment Promotion Platform (CAPIPP), the China-Africa Private Sector Cooperation Forum, and the Chinese Investment in Africa Report, CABC continues to empower enterprises through knowledge, business-networking, and financing services. It also serves as an information intermediary and resource hub between governments and businesses, and between China and Africa.

1.2.3 Regional Distribution: Distinctive Industrial Parks and Clusters of Key Industries

In terms of country distribution, Chinese investment in Africa has increasingly congregated around a number of landmark projects that serve as anchors for the concentration of industries and resources in key markets, with investment activity gradually radiating outward to neighbouring countries and contributing to the emergence of regional investment clusters.

In East Africa, connectivity is driving manufacturing clusters. China Road and Bridge Corporation, a subsidiary of China Communications Construction Company, constructed Kenya's Mombasa–Nairobi Standard Gauge Railway and the supporting Nairobi Inland Container Depot (ICD). The project has reshaped the logistics corridor in East Africa and stimulated the development of industrial parks along the route. The Eastern Industry Zone in Ethiopia, invested in and developed by Jiangsu Yongyuan Investment Co., Ltd., together with the Addis Ababa–Djibouti Railway, with different sections constructed by China Railway Group and

⁷ Ministry of Commerce of the People's Republic of China (2026). Statistical Bulletin of China's Outward Foreign Direct Investment 2025. https://hzs.mofcom.gov.cn/cms_files/filemanager/146795751/attach/20269/f87a21e068264879900ee2a07e0ab74f.pdf.

China Railway Construction Corporation, links landlocked Ethiopia to the Port of Djibouti and has attracted labor-intensive industries such as textiles and footwear. The Sino-Uganda Mbale Industrial Park, supported by the

regional road network and East African railway corridors, has developed industrial clusters in building materials, home appliances, automobile manufacturing, and other sectors, serving inland markets across East Africa.

Box 1 Sino-Uganda Mbale Industrial Park: A Model of China-Africa Cooperation for Industrialization in East Africa

The Sino-Uganda Mbale Industrial Park is a national-level overseas economic and trade cooperation zone developed by and with investment from Chinese private enterprise TianTang Group, as well as a flagship project of China-Uganda manufacturing cooperation under the Belt and Road Initiative. Located in Mbale in eastern Uganda, the park covers an area of 2.5 square kilometers. It is 200 kilometers from Kampala, the capital of Uganda, and 65 kilometers from the Kenyan border. Adjacent to the standard gauge railway project⁸ and three national highways, it serves as an important transport hub linking Uganda with the Port of Mombasa in Kenya and provides convenient access to the surrounding East African market of 200 million people. The park has attracted leading Chinese-invested enterprises, including UNISTEEL (Uganda) Limited, Xinlong Textile & Garment Technology Co., Nice Textiles Uganda Limited, and Timber Paper Industry Uganda Co., which are engaged in localized manufacturing and processing to increase local value-add across the industrial chain. As of August 2026, more than 85 Chinese enterprises had established operations in the park, creating over 15,000 local jobs and turning it into one of East Africa's best-known state-level industrial parks. During a recent visit to the park, Ugandan President Yoweri Museveni emphasized: "The industrial park model is an important pathway for Uganda to achieve economic modernization. The success of the Sino-Uganda Mbale Industrial Park has provided valuable experience for Uganda's industrialization, while the series of achievements in Uganda-China cooperation demonstrate the enduring strength of Africa-China friendship as we jointly advance toward modernization."

In West Africa, Chinese enterprises have increasingly combined resource development with free trade zone platforms. The Boké bauxite project in Guinea, operated by the SMB-Winning Consortium formed by China Hongqiao Group, Winning International Group, Yantai Port, and other partners, together with the operational Simandou iron ore project jointly developed by China Hongqiao Group, China Baowu Steel Group, Aluminum Corporation of China, and other enterprises, have become important pillars of China's supply of critical minerals. In Nigeria, the Lekki Free Trade Zone and Lekki Deep Sea

Port, with investment from China Railway Construction Corporation, the China-Africa Development Fund, and other partners, have developed into a regional hub for energy and chemicals as well as transshipment trade.

In Central Africa, the focus is on integrated value chains for critical minerals. In the Democratic Republic of the Congo, Chinese-invested enterprises such as Sicominex have promoted the local development and processing of copper and cobalt resources. In Zambia, China Nonferrous Metal Mining Group has built an integrated copper

⁸ Refers to the East African standard gauge railway network comprising the Mombasa–Nairobi Standard Gauge Railway, the Nairobi–Malaba Standard Gauge Railway, and planned railway lines within Uganda.

industry cluster centered on the Chambishi Copper Mine and anchored in the Zambia–China Economic and Trade Cooperation Zone, integrating mining, beneficiation, smelting, and downstream processing.

In Southern Africa, the emphasis is shifting toward advanced manufacturing and consumer markets. The Hisense South Africa Industrial Park produces approximately one million televisions and 500,000 refrigerators annually, creating a regional manufacturing ecosystem centered on household appliances. Chinese brands such as BYD are also rapidly expanding their electric-vehicle sales networks and charging infrastructure.

In North Africa, industrial parks are helping to develop new industrial cities. The China–Egypt TEDA Suez Economic and Trade Cooperation Zone began from a largely undeveloped desert site and has developed an industrial structure with bonded logistics as the core platform and eight major manufacturing segments, including new building materials, petroleum equipment, and high and low-voltage electrical equipment. Comprehensive services and supporting infrastructure have subsequently been developed to provide the functions of a fully-fledged industrial community. The zone now hosts more than 200 enterprises and provides tens of thousands of local jobs.

These landmark projects are more than destinations for Chinese capital. They serve as platforms for the diffusion of industrial capabilities, employment opportunities, and skills. As emphasized by the African Development Bank (AfDB) in its African Economic Outlook and research on regional integration, transport corridors can truly become key levers for Africa's industrialization and regional integration only when they are organically combined with industrial parks and local value-added processing and upgraded into “economic corridors.”⁹

1.2.4 Industrial Structure: From Resource-Driven Growth to Diversified and Coordinated Expansion

Over the past decade, the sectoral structure of Chinese investment in Africa has continued to evolve. The earlier model, dominated by mining and construction and driven primarily by resources and engineering contracting, is gradually giving way to a more diverse portfolio spanning manufacturing, services, digital industries, and green development. According to data from China's Ministry of Commerce, the five largest sectors by stockholding of China's direct investment in Africa in 2013 accounted for approximately US\$22.27 billion, or around 85% of the total. Mining, construction, and financial services together accounted for more than 65%. By 2025, construction had risen to first place, while mining had shifted from being the dominant investment destination to providing a stable foundation. Manufacturing had doubled in terms of investment value to become the third-largest sector, finance had continued to expand steadily, and leasing and business services had entered the top five.

Corporate investment trends indicate that this structural transformation is accelerating. First, manufacturing is moving further downstream, with “sell-produce-localize” models gaining momentum. BYD is expanding its dealership network and fast-charging infrastructure in South Africa. Transsion has localized its entire value chain in Africa, encompassing manufacturing, distribution, services, and innovation. Huajian Group has also facilitated the relocation of labor-intensive textile, apparel, footwear, and related manufacturing capacity from China to Ethiopia, contributing to the development of local manufacturing capabilities.

Second, green energy has emerged as a new growth driver. According to statistics from the global energy think

9 See African Development Bank Group(2024).African Economic Outlook 2024.<https://www.afdb.org/en/documents/african-economic-outlook-2024>; African Development Bank Group(2025).2025 Annual Meetings: Regional Corridors as Drivers of Continental Integration.<https://am.afdb.org/en/news/2025-annual-meetings-regional-corridors-drivers-continental-integration>.

tank Ember, China exported approximately 18.8 GW of solar PV modules to Africa in 2025, up about 48% year on year.¹⁰ Module manufacturers such as LONGi Green Energy, Trina Solar, and JA Solar, together with inverter and energy storage system providers such as Sungrow and Huawei Digital Power, are expanding into African markets. This is expected to accelerate the development of renewable-energy generation projects and associated green-power infrastructure.

Third, the digital economy is also gaining momentum. Data centers and cross-border e-commerce have become investment hotspots. Xiaomi has established operations in 16 African countries, including Egypt, South Africa, and Nigeria, and plans to further expand its presence. China and Africa are also advancing the joint development of 20 demonstration projects for digital infrastructure and digital transformation. Meanwhile, service industries such as finance, modern logistics, and digital services are rapidly expanding to complement manufacturing, while modern agriculture is evolving from an emerging field into an increasingly important pillar of economic cooperation.

Ahunna Eziakonwa, assistant administrator of the United Nations Development Programme(UNDP) and director of the Regional Bureau for Africa, has observed that Chinese investment in Africa is currently expanding rapidly into a broader range of sectors, including manufacturing, tourism, and digital industries.¹¹ This shift clearly reflects the transformation of China-Africa cooperation from providing inputs toward building productive capacity, and from traditional aid-oriented engagement toward joint development and co-investment.

1.2.5 Service Institutions: Think Tank Support and an Integrated Service System

The growing maturity of the investment ecosystem in

Africa is also reflected in a shift from enterprises operating independently toward a more coordinated system of institutional support. Across the investment lifecycle, think tanks and universities, legal and arbitration institutions, financial institutions, and insurers are increasingly working together to meet investors' information, research, legal, and financial needs. This emerging support network helps address two longstanding challenges facing cross-border investment: information asymmetry and limited capacity to hedge against risk.

Think tanks and universities specializing in regional and country studies provide a strong academic foundation for Africa-related research. Institutions including the Institute of West-Asian and African Studies of the Chinese Academy of Social Sciences, the Center for African Studies of Peking University, and the Institute of African Studies at Zhejiang Normal University have long produced authoritative policy analysis. In recent years, think tank research has also continued to evolve, with the Institute of African Studies at Hunan University using digital and intelligent innovation to support African studies and the high-quality development of China-Africa cooperation. Market-oriented institutions such as Development Reimagined provide on-the-ground assessments that are more closely aligned with practical need. Together, these institutions help reduce the information gaps confronting Chinese enterprises entering African markets.

An integrated service system provides support primarily through legal and financial services. In legal advisory services, the China-Africa Commercial Arbitration Court was launched at the Fourth China-Africa Economic and Trade Expo in 2025, providing legal advice to more than 100 enterprises. In July of the same year, the FOCAC Legal Forum was held in Changsha, bringing together legal scholars and practitioners from China and 26 African countries. The CIETAC China-Africa Trial Center

10 Ember(2026). Global Electricity Review 2026. <https://ember-energy.org/latest-insights/global-electricity-review-2026/global-electricity-insights/>.

11 China Economic Net (2025). China-Africa Industrial Chain Cooperation Continues to Deepen and Deliver Concrete Results. http://www.ce.cn/xwxz/gnsz/gdxw/202506/t20250620_2333359.shtml.

has also emerged as a specialized channel for resolving cross-border commercial disputes. These developments demonstrate the growing role of the rule of law in providing a stable institutional base for long-term China–Africa economic and trade cooperation. In financial services, the China-Africa Development Fund and the China-Africa Fund for Industrial Cooperation leverage equity investment to support enterprises in investment and financing in

Africa, and have supported landmark projects such as the Hisense South Africa Industrial Park and the China-Egypt TEDA Suez Economic and Trade Cooperation Zone. China Export & Credit Insurance Corporation provides credit insurance for overseas investment. Together, these institutions form a support network combining capital provision and risk mitigation.

1.3 Three Interlocking Drivers Shaping New Opportunities for China–Africa Cooperation

The continued expansion of China–Africa investment cooperation in a complex and rapidly changing international environment is fundamentally driven by the convergence of three forces. First, China is accelerating its global expansion on the back of a comprehensive industrial base and growing capabilities in green manufacturing. Second, Africa's accelerating urbanization, industrialization, and agricultural modernization are generating substantial and sustained investment demand. Third, intensifying competition and cooperation among major powers, together with the AI revolution, is reshaping global production networks and the geopolitical landscape. The interaction of these three forces is creating new opportunities and a new logic for China–Africa investment cooperation.

1.3.1 China's Industrial Strengths: Competitive Production Capacity and Global Expansion

After decades of development, China has built a comprehensive modern industrial system with extensive supply-chain integration. It has established large-scale production capacity and significant cost advantages in areas such as equipment manufacturing, infrastructure engineering, consumer electronics, light industry and textiles, and building materials and chemicals. China has

also built globally competitive and increasingly integrated value chains in green industries such as photovoltaics, energy storage, and new-energy vehicles, spanning upstream materials through to finished products. At the same time, tariff and market-access barriers in some Western markets have constrained the entry of Chinese products, while rising domestic factor costs and saturation in some segments of the Chinese market have encouraged Chinese industries to seek new markets and production bases overseas. Against this backdrop, Africa, with its strong development needs, abundant reserves of critical minerals, and the prospect of a unified market under the AfCFTA framework, has become an important destination for China's global industrial expansion.

Green manufacturing and related investment provide a particularly clear illustration. In electric vehicles, statistics from the International Energy Agency (IEA) show that annual EV sales in Africa surged from around 4,000 units in 2023 to approximately 25,000 in 2025, representing more than a fivefold increase in just two years. Over the same period, BYD's share of the African EV market rose from approximately 4% to around 35%.¹² In green-technology trade, China's exports of low-carbon technology products (LCTs) to Africa reached US\$9.8 billion in 2024, accounting for approximately 5.4% of total exports to the continent and more than doubling from

12 IEA(2026). Global EV Outlook 2026 – Trends in electric cars. <https://www.iea.org/reports/global-ev-outlook-2026/trends-in-electric-cars>.

less than US\$4 billion in 2013.¹³ Africa is becoming one of the fastest-growing overseas markets for China's new energy products.

Beyond green production capacity, Chinese industries are also expanding across multiple sectors in Africa. In infrastructure and engineering construction, Chinese enterprises are deeply involved in the development of railways, ports, power systems, and communications networks across the continent. In light manufacturing, household appliances, building materials, automobiles, and auto components, localized assembly and the transfer of production capacity are steadily advancing, accompanied by the transfer of technologies, standards, and management expertise. China brings productive capacity, technology, and capital to support Africa's industrialization and the development of local manufacturing capabilities, while Africa offers Chinese industries new growth opportunities through its markets, natural resources, and strategic geographic position. This complementarity creates the basis for mutually beneficial cooperation.

1.3.2 Africa's Development Momentum: Urbanization, Industrialization, and Agricultural Modernization, and Demand for Industrial Upgrading

Africa is simultaneously undergoing urbanization, industrialization, and agricultural modernization. The convergence of these three transformations is generating broad-based and sustained demand for investment. With regard to urbanization, according to OECD projections, Africa's urbanization rate is expected to rise from

approximately 54% in 2020 to around 65% by 2050.¹⁴ This transition will generate substantial demand for housing, transport, water supply, telecommunications, and related urban infrastructure and services. In terms of industrialization, Africa's manufacturing base remains relatively underdeveloped, with manufacturing accounting for around 10% of economic activity in sub-Saharan Africa over the long term.¹⁵ Across the continent, governments are increasingly prioritizing industrial upgrading, industrial capacity cooperation, and the development of industrial parks. This creates considerable scope for China–Africa cooperation in manufacturing value chains and the relocation or establishment of production capacity. In terms of agricultural modernization, Africa is estimated to possess approximately 60–65% of the world's uncultivated arable land and around 9% of global renewable freshwater resources. Yet only about 3–4% of cultivated land in sub-Saharan Africa is irrigated.¹⁶ Low yields and heavy dependence on rainfall remain major constraints. As a result, substantial opportunities exist in irrigation infrastructure, improved seed development, agricultural machinery, storage and logistics, and downstream agricultural processing. Taken together, Africa's demand across these three fields of transformation is highly complementary to China's strengths in infrastructure, manufacturing, and agricultural technology, while also aligning with broader multilateral development initiatives. During the BRICS Summit in Johannesburg, China previously announced three initiatives: the Initiative on Supporting Africa's Industrialization, the Plan for China Supporting Africa's Agricultural Modernization, and the Plan for China-Africa Cooperation on Talent Development. These measures support Africa's integration and modernization in the three dimensions of industry,

13 Global Development Policy Center(2026). China-Africa Economic Bulletin.<https://www.bu.edu/gdp-cn/files/2026/05/GCI-China-Africa-Bulletin-2026-CH.pdf>.

14 OECD & AfDB(2025).Africa's Urbanisation Dynamics 2025.https://www.oecd.org/en/publications/2025/03/africa-s-urbanisation-dynamics-2025_005a8aa0.html.

15 World Bank(2026).Manufacturing, value added (% of GDP) – Sub-Saharan Africa (NV.IND.MANF.ZS).<https://data.worldbank.org/indicator/NV.IND.MANF.ZS?locations=ZG>.

16 See United Nations(2026).Africa's water is its future. Who will govern it?.https://www.un.org/osaa/en/news/africas-water-its-future-who-will-govern-it?utm_source=flipboard&utm_content=other; AGRA(2025).Rapport sur les Systèmes Alimentaires en Afrique : moteurs de changement et innovations. <https://agra.org/wp-content/uploads/2025/09/AFSR2025-FR.pdf>.

agriculture, and human resources (see Box 2). They are aligned with the development objectives of the African Union's Agenda 2063 and provide institutional channels

through which Chinese investment and industrial capacity can better respond to Africa's own development priorities.

Box 2 Three Plans Proposed by China at the BRICS Summit in South Africa to Support Africa's Industrialization and Agricultural Modernization

- **Initiative on Supporting Africa's Industrialization:** China will support Africa in developing manufacturing, digital industries, and renewable energy, strengthen knowledge sharing and technology transfer, improve trade facilitation measures for Africa, expand imports of high-quality manufactured products from Africa, and promote the development of demonstration industrial parks serving as regional hubs.
- **Plan for China's Support for Africa's Agricultural Modernization:** China will work with African countries to strengthen the alignment of agricultural development strategies, expand cooperation in sustainable agriculture, digital agriculture and the blue economy, help African countries develop and expand agricultural value chains, increase the added value of agricultural products, and expand agricultural exports to China.
- **Plan for China-Africa Cooperation on Talent Development:** China and African countries will jointly develop talent in areas including modernising governance capacity, economic and social development, boosting scientific and technological innovation, and improving public wellbeing, thereby supporting the African Union's human-capital development objectives under the first ten-year implementation plan of *Agenda 2063*.

1.3.3 Global Shifts: Great-Power Competition and the AI Revolution

Beyond the two-way needs of China and Africa, two major shifts in the global landscape are reshaping Africa's development trajectory and investment environment. The first is the intensification of great-power competition, particularly over African markets, resources, and strategic transport corridors. In the United States, uncertainty surrounding the future of the African Growth and Opportunity Act (AGOA) has increased. The Act expired on September 30, 2025,

and was subsequently renewed retroactively by the U.S. Congress in February 2026 through 31 December 2026.¹⁷ Its longer-term future, however, remains subject to U.S. domestic political dynamics. At the same time, the United States has imposed "reciprocal tariffs" on countries including South Africa and Nigeria, creating additional pressure on African exports. The European Union has stepped up investment in Africa through its Global Gateway strategy, with approximately EUR 150 billion earmarked for African initiatives,¹⁸ while establishing critical-minerals partnerships with countries including South Africa, Rwanda, the Democratic Republic of the

17 Office of the United States Trade Representative (2026) . Statement from Ambassador Jamieson Greer on the Reauthorization of the African Growth and Opportunity Act. <https://www.ustr.gov/about/policy-offices/press-office/press-releases/2026/february/statement-ambassador-jamieson-greer-reauthorization-african-growth-and-opportunity-act>

18 European Commission(2025).EU-Africa Global Gateway Investment Package.https://international-partnerships.ec.europa.eu/policies/global-gateway/initiatives-sub-saharan-africa/eu-africa-global-gateway-investment-package_en.

Congo (DRC), Zambia and Namibia. The Lobito Corridor, linking Angola, the DRC and Zambia, has also become a major focus of international competition. Through its Team Europe Initiatives, the EU has mobilized more than EUR 2 billion for the corridor, while the U.S. International Development Finance Corporation (DFC) has provided approximately USD 553 million in direct financing for the Lobito railway.¹⁹ Great-power competition has, in turn, strengthened Africa's bargaining position, while African countries are increasingly taking a proactive approach to securing greater value from their resources. At its 38th Ordinary Session in February 2025, the African Union adopted the Africa Green Minerals Strategy (AGMS). South Africa, meanwhile, used its G20 presidency to promote an agenda of "local value addition" in critical minerals, seeking to convert resource endowments into industrial development and employment. In contrast to a zero-sum approach to geopolitical competition, China–Africa cooperation is grounded in African agency and complementarity between the two sides. It does not seek to create an exclusive bloc; rather, it places respect for Africa's right to make its own development choices and support for local value creation at the centre of cooperation.

The second major shift is the accelerating AI revolution, by which Africa is becoming an emerging frontier for investment in computing capacity and digital infrastructure. According to projections by market research firm Arizton, Africa's data center investment market, driven by AI workloads, is expected to expand from approximately USD 3.64 billion in 2025 to around USD 8.76 billion by 2031, representing a compound annual growth rate of

approximately 15.8%.²⁰ According to estimates by SAP, if Africa can capture around 10% of the global AI market, artificial intelligence could add approximately USD 1.5 trillion to the African economy by 2030.²¹ Accordingly, Africa is treating artificial intelligence as a strategic resource for advancing the African Union's Agenda 2063 and the United Nations Sustainable Development Goals. The African Union, for example, has introduced the Continental Artificial Intelligence Strategy, while countries including Mauritius, Kenya, and Egypt have launched their own national plans. Africa's digital transformation, however, remains constrained by infrastructure gaps and limited local capabilities. African data centres currently account for less than 1% of global capacity, while only around 2% of data is stored locally. African indigenous languages account for less than 1% of online content, and electricity shortages further raise the barriers to digital technology adoption.

These development gaps align with China's strengths in digital infrastructure, technological capabilities, and energy supply. China continues to participate in investment in Africa's fiber-optic networks, 5G, data centers, and other digital infrastructure, while leveraging artificial intelligence technologies to develop innovative applications tailored to local African contexts. At the same time, drawing on its strengths in clean energy and power grid development, China is providing integrated "green electricity + computing power" solutions for Africa's computing infrastructure, promoting deeper integration of Chinese technology, capital, and governance experience with Africa's development needs.

19 See European Commission(2025).Lobito Corridor: building the future together.https://international-partnerships.ec.europa.eu/lobito-corridor-building-future-together_en; DFC(2025).DFC CEO Ben Black Signs Loan Agreement for Lobito Atlantic Railway,Securing Critical Minerals for Mutual U.S.–Africa Benefit. <https://www.dfc.gov/media/press-releases/dfc-ceo-ben-black-signs-loan-agreement-lobito-atlantic-railway-securing>; Financial Afrik(2025).DFC commits \$553 million to Lobito Corridor alongside Angola.<https://www.financialafrik.com/en/2025/12/27/dfc-commits-553-million-to-lobito-corridor-alongside-angola/>.

20 Arizton(2026).Africa Data Center Market Investment to Reach USD 8.76 Billion by 2031,as South Africa, Kenya, Nigeria, and Egypt Emerge as Strategic Hubs - Arizton.<https://www.prnewswire.com/news-releases/africa-data-center-market-investment-to-reach-usd-8-76-billion-by-2031--as-south-africa-kenya-nigeria-and-egypt-emerge-as-strategic-hubs--arizton-302809272.html>.

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02

Trade Prosperity and Institutional Opening-up: Zero-Tariff Dividends and China-Africa Value-Chain Integration

Among the many drivers of China-Africa investment cooperation, changes in the trade regime have played a leading role. On December 1, 2024, China implemented zero-tariff treatment on 100% of tariff lines for all least developed countries having diplomatic relations with China, including 33 African countries. On May 1 2026, this treatment was further extended to all 53

African countries that have diplomatic relations with China. China thus became the first major economy in the world to provide full zero-tariff coverage to all African diplomatic partners. This represents both the implementation of the “Partnership Initiative for Trade Prosperity” announced at the 2024 Beijing Summit of FOCAC and a landmark feature of China’s institutional opening-up.

2.1 Expansion of Coverage: From Selective Concessions to Full Zero-Tariff Treatment

China’s zero-tariff policy toward Africa has evolved through a gradual process of expanding both coverage and preferential treatment (see Figure 3). In 2005, China first introduced zero tariffs on 190 tariff lines covering 25 least developed African countries. Thereafter, under successive commitments made through the FOCAC, the scope of beneficiary countries and eligible tariff lines continued to expand. Coverage increased to 454 tariff lines in 2007 and 4,762 tariff lines in 2010, before being progressively raised to 97% and then 98% of all tariff lines in subsequent phases. At the 2024 Beijing Summit of FOCAC, the policy underwent a qualitative shift from partial tariff-line coverage to coverage of all tariff lines. In 2026, the policy was extended beyond LDCs to all African countries with which China maintains diplomatic relations,

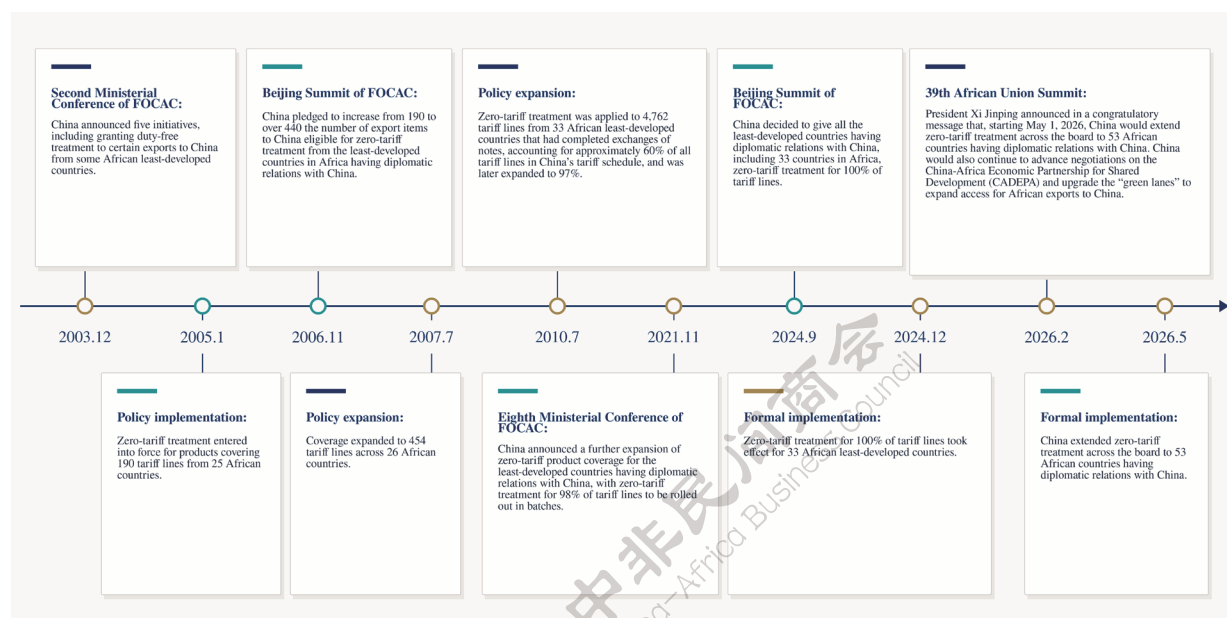
completing the progressive expansion of China’s trade opening towards Africa from selected countries and products to comprehensive coverage.

As unilateral preferential access has continued to grow, zero-tariff treatment is also evolving from a unilateral concession into a more institutionalised framework of bilateral cooperation. China has introduced the Framework Agreement on Economic Partnership for Shared Development (CADEPA), following a three-stage approach of “framework agreement – early harvest – modular agreements”. The framework agreement first establishes the overall direction of cooperation; early-harvest arrangements then introduce reciprocal opening in selected areas; modular agreements subsequently

expand cooperation into broader areas, including trade in goods, services and investment. As of July 2026, 38

African countries had signed CADEPAs with China.²²

Figure 3 Key Stages in the Expansion of China's Zero-Tariff Policy Towards Africa



Source: Customs Tariff Commission of the State Council; official website of the Forum on China-Africa Cooperation; China-Africa SPS Cooperation Information Website.

2.2 Positive Developments: Growth in Trade Volume and Structural Upgrading under Zero-Tariff Treatment

2.2.1 Product Profile: Scale Expansion and Structural Optimization

1 China's Imports from Africa

China-Africa trade continued to expand during the 14th Five-Year Plan period, with imports maintaining steady growth (see Figure 4). From 2021 to 2025, total

China-Africa trade increased from approximately USD 254 billion to around US\$348 billion in 2025, reaching a record high. China's imports from Africa rose steadily from approximately USD 106 billion in 2021 to around USD 123 billion in 2025. In 2025 alone, imports reached approximately USD 123 billion, up 5.4% year on year. Despite fluctuations in global commodity prices and adjustments in the volume and pace of resource shipments, imports from Africa maintained a positive

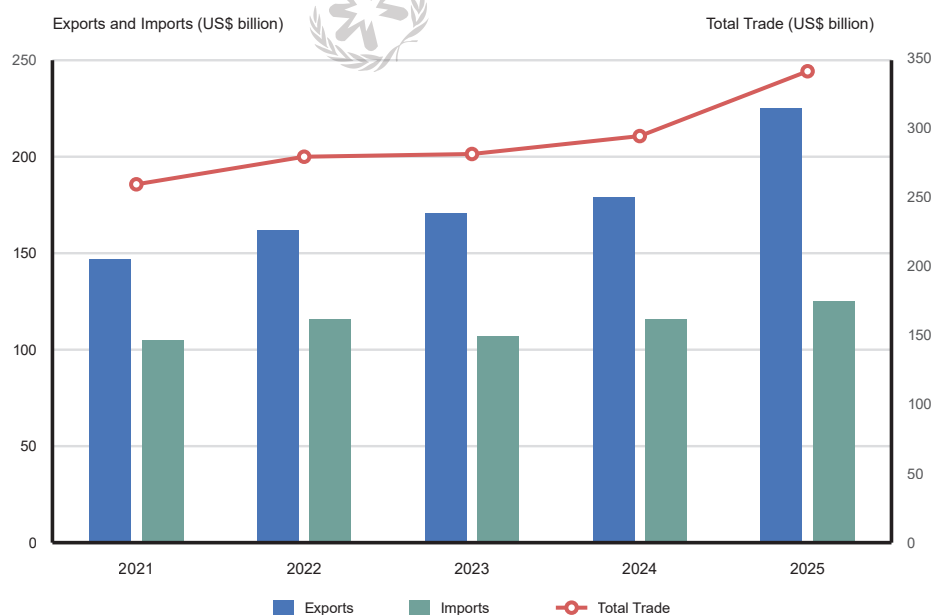
²² China National Radio (2026). China and Namibia Sign Framework Agreement on Common Development Economic Partnership. https://news.cnr.cn/native/gd/20260715/t20260715_527712231.shtml.

balance, providing an initial indication that the phased implementation of zero-tariff treatment has helped underpin import growth. It is important to note, however, that China's exports to Africa during the same period reached approximately USD 225 billion, an increase of 25.8%, while imports grew considerably more slowly. As a result, China's trade surplus with Africa widened to approximately USD 102 billion. This pattern of exports growing faster than imports provides an important starting point for understanding the deeper rationale behind China's move towards comprehensive zero-tariff treatment from the perspective of promoting more balanced China-Africa trade.

As the zero-tariff policy has been rolled out in stages, new momentum in China's imports from Africa has continued to be released and has accelerated markedly in recent months (see Figure 5). In 2025, monthly imports from Africa generally ranged between USD 9 billion and

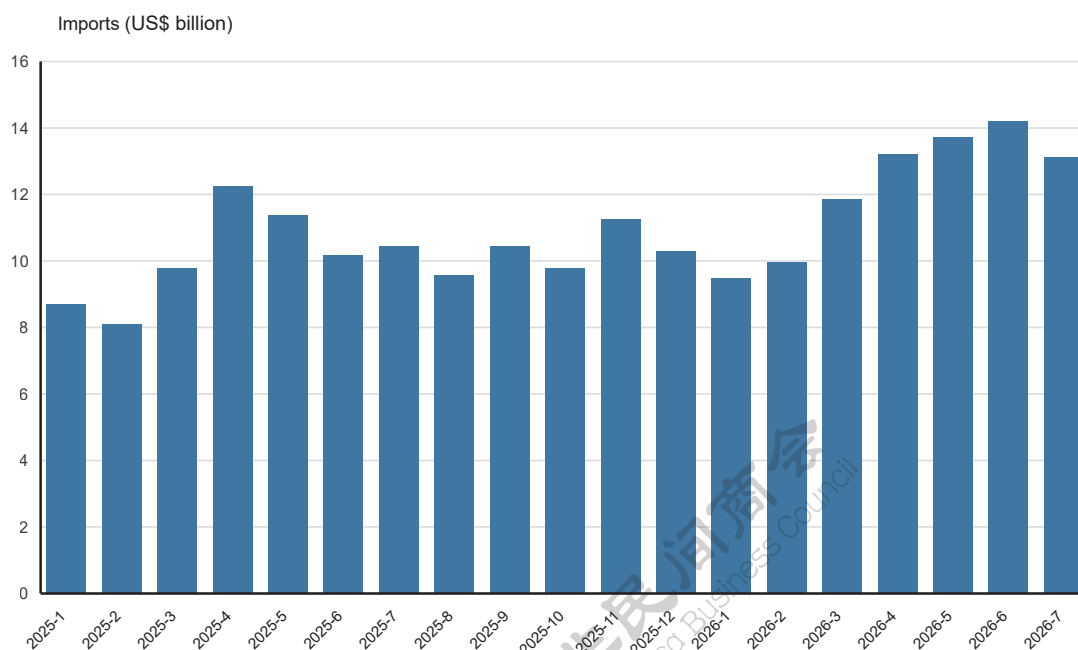
USD 12.5 billion, falling to just over USD 8 billion at the beginning of the year due to the seasonal impact of the Chinese New Year before gradually stabilising and recovering as the benefits of the first phase of comprehensive zero-tariff treatment took effect. This first phase came into force on 1 December 2024 and covered 33 African least-developed countries. In 2026, zero-tariff treatment was extended to all 53 African countries with which China maintains diplomatic relations. In May to July, following the implementation of the policy, China's combined imports from Africa reached approximately USD 41.6 billion, up 28.0% year on year and accounting for nearly half of total imports from Africa during the first seven months of the year. The close alignment between monthly import trends and the timing of policy expansion provides clear evidence that the benefits of institutional opening are being translated into tangible increases in imports.

Figure 4 China-Africa Trade Trends (2021–2025)



Data source: General Administration of Customs of China.

Figure 5 China's Imports from Africa (January 2025–July 2026)



Data source: General Administration of Customs of China.

2 Structure of Imported Product Categories

In terms of product structure, China's imports from Africa have long been characterized by a high concentration in energy and mineral resources and a relatively low share of manufactured products. Following the introduction of zero-tariff treatment, processed products have received the same tariff treatment as raw materials, and growth in relevant categories points to the early stages of diversification in Africa's export structure to China. As shown in Table 3, in 2025, imports of mineral products, and metal, stone and related products, totaled approximately USD 114 billion, accounting for more than 90% of China's total imports from Africa. These categories consist primarily of bulk commodities such as crude oil, copper and cobalt, bauxite and iron ore. Changes in their import values are driven more by international commodity prices and the timing and volume of production and shipments than by tariff adjustments. In contrast, agricultural products, wood products, textiles and apparel, chemical products,

and other semi-processed and labour-intensive products together accounted for less than 10%, highlighting the continued concentration of African exports in the lower-value segments of global value chains. Nevertheless, marginal changes are already becoming visible beyond the dominant resource categories. From January to July 2026, imports of textiles and apparel increased by 36.1% and transport equipment by 80.4%. Chemical imports, after surging 43.8% in 2025, continued to grow by a further 11.6%. At the same time, a wider range of high-quality African products has entered the Chinese market. Within the first two months after comprehensive zero-tariff treatment took effect, imports of aquatic products and textile raw materials from Africa both recorded double-digit year-on-year growth. Import values for avocados increased by 130%, apples by 89.6%, oranges by 27.9%, and grapefruit by 11.9%, highlighting the expanding scope for consumer demand and China-Africa trade cooperation.

Table 3 Product Composition of China's Imports from Africa²³

Category	Jan–Dec 2025			Jan–July 2026			Comprehensive Zero-Tariff Implementation			
	Imports (US\$ billion)	Share (%)	YoY (%)	Imports (US\$ billion)	Share (%)	YoY (%)	First Month		Second Month	
							Imports (US\$ billion)	YoY (%)	Imports (US\$ billion)	YoY (%)
Agricultural products	4.38	2.2	-9.2	2.86	2.3	-0.3	0.56	8.0	0.37	-16.1
Mineral products	73.11	10.1	11.0	50.34	11.0	20.6	7.72	19.1	8.27	42.5
Chemical products	2.50	1.0	43.8	1.59	1.0	11.6	0.36	56.5	0.19	-23.3
Textiles and apparel	0.77	1.8	-7.0	0.57	2.1	36.1	0.07	-6.1	0.11	72.8
Wood products	1.11	2.4	-13.6	0.63	2.4	0.3	0.10	7.7	0.08	-6.1
Metal, stone and related products	40.59	14.4	-1.9	30.39	10.9	24.9	5.01	24.1	5.37	48.2
Electronic equipment	0.51	0.1	-32.9	0.27	0.0	-20.5	0.03	-31.2	0.04	-15.7
Transport equipment	0.04	0.1	-13.4	0.04	0.1	80.4	0.01	167.7	0.01	97.2
Other manufactured products	0.01	0.1	-35.9	0.01	0.1	5.9	0.00	-19.1	0.00	-14.4

Data sources: General Administration of Customs of China; relevant reports by the Digital Economy Lab of the University of International Business and Economics.

When the changes in tariff rates for major product categories are considered alongside the above data (see Table 4), the response of different products to the zero-tariff policy can be broadly grouped into three trends.

First, the effect of tariff cuts on energy and mineral resources is relatively limited. The original most-favored-nation (MFN) tariff rates on bulk commodities such as crude oil, copper ores, and bauxite were generally already low, ranging from 0% to 5%. The scope for direct tariff

reductions is therefore limited, and changes in trade volumes are determined primarily by production levels, shipping schedules and international prices.

Second, the impact of the export dividend on distinctive agricultural products is stronger. Agricultural products such as coffee, sesame, cocoa, tobacco leaves, and citrus fruits previously faced tariff rates ranging from 8% to 30%, leaving considerably more room for tariff-related gains.

23 In Table 3, "Share" refers to the proportion of trade with Africa in the total trade value of the corresponding product category.

Third, the incentive for manufacturing upgrading is receiving a boost. On the first day of policy implementation, Nigerian blue wet hides were cleared through customs at zero tariff. This illustrates how equal tariff treatment

for processed goods can provide a clear institutional incentive for African economies to move from the export of primary commodities towards local processing and value-add.

Table 4 Selected Changes in Tariff Rates for Major African Products Exported to China

Product Category	Major Products	MFN Tariff Rate (Before)	Preferential Tariff Rate for Africa (After)	Tariff Reduction
Energy, mineral products and base metal products	Cobalt products	4%	0%	-4%
	Copper cathodes	2%	0%	-2%
	Various ores and concentrates	0%	0%	No change
	Crude oil	0%	0%	No change
Agricultural products	Citrus fruits	11%~30%	0%	-30%~-11%
	Sesame	10%	0%	-10%
	Tobacco leaves	10%	0%	-10%
	Green coffee beans	8%	0%	-8%
	Cocoa beans	8%	0%	-8%
	Natural rubber	20%	20%	No change
Manufacturing	Leather products	5%~14%	0%	-14%~-5%
	Auto parts	6%~10%	0%	-10%~-6%

Sources: Announcements of the Customs Tariff Commission of the State Council over the years; relevant reports by the China-Africa Development Fund.

Box 3 First Zero-Tariff Shipments from Africa Clear Customs Across China

- Since the zero-tariff policy took effect, successive consignments of African products have cleared customs at ports across China.
- **First shipment nationwide:** South African apples cleared customs in Shenzhen. At midnight on 1 May 2026, 24 tonnes of apples from South Africa underwent expedited customs inspection and release at Shenzhen Bay Port. The applicable tariff was reduced from 10% to 0%, making the shipment the first imported consignment nationwide to clear customs under the new policy.

- **First shipment nationwide to claim preferential treatment based on an importer's declaration and clear customs in Qingdao.** On July 22, 2026, Kerry Oils & Grains (Qingdao) Co., Ltd. imported sesame from Tanzania and successfully claimed zero-tariff treatment on the basis of an independently issued importer's declaration of origin, saving approximately RMB 200,000 (around US\$28,000) in duties. This was the first African shipment to China to receive preferential treatment based on an importer's declaration.
- **First shipments in various regions followed.** On 1 May 2026, 516 tonnes of fresh oranges from Egypt cleared customs at Shanghai Waigaoqiao Port, saving approximately RMB 320,000 in duties on a single shipment. On the same day, more than 6,000 bottles of South African wine were released by customs at Changsha Huanghua International Airport in Hunan. On 3 May, 318 engine gaskets originating in South Africa completed customs clearance procedures at Lianglu Cuntan Customs under Chongqing Customs. On the same day, 747 tonnes of Nigerian bone granules arrived at Dalian's Dayaowan Port, saving the importing company more than RMB 300,000 in duties.

2.2.2 Regional Characteristics: Widespread Gains and Growing Strengths

Because countries entered the preferential regime at different starting points, benefits have emerged over different timeframes and are far from evenly distributed. Rather, they are unfolding progressively along three

axes: product differentiation, regional variation, and diversification of participating market actors. Table 5 groups countries by region and presents the effective dates of zero-tariff treatment and the key product categories benefiting from the policy, providing a clear overview of the distribution of benefits across the 53 African countries with diplomatic relations with China.

Table 5 Regional Analysis: Overview of Zero-Tariff Treatment for the 53 African Countries with Diplomatic Relations with China²⁴

Region	Country	Effective Date	Competitive or Beneficiary Product Categories
Northern Africa	 Algeria	2026/5/1	Oil and gas, copper, cork, fatty acids, wool
	 Egypt	2026/5/1	Frozen strawberries, fresh oranges, flax, cotton
	 Libya	2026/5/1	Crude oil

24 In the table, the "Effective Date" refers to the confirmed effective date of comprehensive zero-tariff treatment and is divided into three groups: ① 1 December 2024, when the arrangement first took effect for 33 least developed (LDC) countries; ② 1 May 2026, when preferential tariff rates took effect for 20 non-LDC African countries for the period from 1 May 2026 to 30 April 2028; and ③ 1 April 2026, when the Republic of the Congo received early implementation under an early harvest arrangement within the framework of the Framework Agreement on Economic Partnership for Shared Development (CADEPA). Regarding the early harvest arrangements, the Republic of the Congo was the first African country to complete the signing of such an arrangement, which took effect on 1 April 2026. Kenya signed an early harvest arrangement in March 2026, but no effective date was announced in the relevant arrangement; this table therefore uses the confirmed effective date of the generally applicable preferential measure, 1 May 2026. Seychelles has reached agreement with China on an early harvest arrangement, but no announcement of its signing or entry into force has yet been issued, and it is therefore also recorded as 1 May 2026. These three countries are marked with an asterisk (*) in Table 5.

Western Africa		Morocco	2026/5/1	Copper, mechanical and electrical products, argan oil, fish oil
		Sudan	2024/12/1	Sesame, peanuts, cotton, gum arabic
		Tunisia	2026/5/1	Textiles, mechanical and electrical products, olive oil
		Benin	2024/12/1	Cotton, cashew nuts
		Burkina Faso	2024/12/1	Sesame, cotton, shea nuts
		Cabo Verde	2026/5/1	Fishery products, light industrial products
		Côte d'Ivoire	2026/5/1	Cocoa, cocoa paste, cashew nuts
		Gambia	2024/12/1	Cashew nuts, fishery products
		Ghana	2026/5/1	Cocoa, cashew nuts, shea butter
		Guinea	2024/12/1	Bauxite, Simandou iron ore, cocoa, cashew nuts, fishery products
		Guinea-Bissau	2024/12/1	Cashew nuts, fishery products, sesame, peanuts
		Liberia	2024/12/1	Iron ore, timber, cocoa
		Mali	2024/12/1	Sesame, raw cotton, peanuts, mangoes
		Mauritania	2024/12/1	Iron ore, fishery products
		Niger	2024/12/1	Uranium, sesame
		Nigeria	2026/5/1	Oil and gas, cocoa, sesame, ginger, soybeans, wet-blue sheepskins
		Senegal	2024/12/1	Peanuts, sesame, seafood
		Sierra Leone	2024/12/1	Cocoa, ilmenite, fishery products
		Togo	2024/12/1	Sesame, soybeans

Southern Africa		Botswana	2026/5/1	Copper and nickel, grass-fed beef
		Lesotho	2024/12/1	Textiles, garments
		Namibia	2026/5/1	Uranium, fishery products
		South Africa	2026/5/1	Iron and chromium, platinum-group metals, manganese, coal, citrus fruit, nuts
Eastern Africa		Burundi	2024/12/1	Coffee, tea
		Comoros	2024/12/1	Vanilla, cloves, ylang-ylang essential oil
		Djibouti	2024/12/1	Salt, livestock products
		Eritrea	2024/12/1	Minerals, fishery products
		Ethiopia	2024/12/1	Coffee, oilseeds
		Kenya*	2026/5/1	Coffee, fresh flowers, avocados, nuts
		Madagascar	2024/12/1	Vanilla, cloves, fishery products
		Malawi	2024/12/1	Tobacco, tea, soybeans, macadamia nuts
		Mauritius	2026/5/1	Sugar, textiles, fishery products
		Mozambique	2024/12/1	Sesame, tobacco
		Rwanda	2024/12/1	Coffee, avocados
		Seychelles*	2026/5/1	Fishery products, processed aquatic products
		Somalia	2024/12/1	Livestock products, frankincense
		South Sudan	2024/12/1	Oil and gas, sesame
		Tanzania	2024/12/1	Cashew nuts, sesame, minerals
		Uganda	2024/12/1	Coffee, dried chili peppers, wild aquatic products, cocoa beans
		Zambia	2024/12/1	Copper, tobacco, macadamia nuts
		Zimbabwe	2026/5/1	Tobacco, lithium, chromium, citrus fruit, nuts

Central Africa		Angola	2024/12/1	Crude oil
		Cameroon	2026/5/1	Crude oil, timber, cocoa paste
		Central African Republic	2024/12/1	Timber
		Chad	2024/12/1	Gum arabic, sesame, peanuts
		Republic of the Congo*	2026/4/1	Crude oil, timber, peanuts, poria, cocoa
		Democratic Republic of the Congo	2024/12/1	Copper, cobalt, mineral ores
		Equatorial Guinea	2026/5/1	Crude oil, timber
		Gabon	2026/5/1	Manganese ore, crude oil, timber
		São Tomé and Príncipe	2024/12/1	Cocoa

Source: Announcements of the Customs Tariff Commission of the State Council; relevant reports of the China-Africa Development Fund.

1 North Africa: Emerging Potential for Diversification amid Political Instability

In 2025, the six North African countries exported approximately USD 4.38 billion worth of goods to China, down about 10.8% year on year. The decline was mainly attributable to sharp drops in exports from Sudan and Libya fuelled by geopolitical conflicts and port blockades. Excluding the impact of political disruptions, North Africa's export structure is steadily diversifying, underpinned by solid energy and mineral resources, distinctive agricultural products, and emerging manufactured exports.

Egypt is a key driver of this structural transformation. In 2025, its exports to China reached approximately USD 820 million, up 42.1%, with frozen strawberries becoming its largest single export product to China at around USD 90 million. In the first seven months of 2026, exports continued to grow, reaching USD 660 million, up 55.2% year on year. Frozen strawberry exports alone reached USD 120 million, an increase of 99.6%, already exceeding the full-year figure for 2025. Combined with Egypt's

strengths as a major global producer of extra-long staple cotton and flax, zero-tariff treatment is expected to create new opportunities for its agricultural and manufactured exports.

Morocco, meanwhile, is seeking to move up the value chain by leveraging its resource base and strategic location. In 2025, its exports to China totaled approximately USD 1.09 billion, with machinery and electrical and electronic products already accounting for roughly one-third of exports to China. Comprehensive zero-tariff treatment will increase the price competitiveness of Moroccan electronics exports. Morocco also controls more than 90% of global production of commercial argan oil, which previously faced a tariff rate of 20%, creating significant potential for expanded exports to China through cross-border e-commerce. From January to July 2026, North Africa exported approximately USD 3.24 billion worth of goods to China, up 42.8% and accounting for about 3.7% of Africa's total exports to China over the same period. The region's established energy and mineral base, together with the increasing diversity of its agricultural and

manufacturing exports, continued to support this growth.

2 West Africa: Fastest Growth, with Energy and Minerals Dominating while Agricultural Products Begin to Break Through

In 2025, West Africa's exports to China reached approximately USD 25.12 billion, up 38.1% year on year, making it the fastest-growing of the five regions. Growth was driven primarily by energy and mineral products. Guinea's bauxite exports remain a major contributor, with energy and mineral products accounting for approximately 89% of the region's exports. However, because many such commodities already faced relatively low tariff rates, the direct boost from zero-tariff treatment is limited. Although overall the region's agricultural exports remain in a period of adjustment, clear positive differentiation has emerged within the product mix. Sesame exports to China reached approximately USD 870 million, up 16.3%; cocoa and cocoa products increased by 44.4%; cashew nuts rose by 45.3%.

Senegal, for example, is a least developed country and has already benefited from zero-tariff treatment. Following the opening of the export channel for peanut oil, Senegal's exports of crude peanut oil to China surged from US\$1.26 million in 2024 to US\$18.3 million in 2025, followed by a further 533% increase in the first seven months of 2026. Exports of shelled peanuts rose by 227.6% over the same period. This provides a direct example of how preferential tariff treatment can stimulate agricultural exports from least developed countries.

Ghana, where exports of cocoa and cocoa products increased by 58.0%, and Côte d'Ivoire, where cocoa exports grew by 37.3% and shelled cashew exports reached USD 34 million, provide further evidence of the regional diffusion of agricultural export opportunities. From January to July 2026, West Africa's exports to China totaled approximately USD 16.58 billion, up 6.4% year on year and accounting for about 19.1% of China's total imports from Africa during the same period. Regional

agricultural exports nevertheless declined by 29.4%, mainly due to a fall in sesame exports, the region's largest agricultural export category. Cashew exports moved in the opposite direction, rising by 59.8%, with shelled cashews increasing by 89.0%, further reinforcing the emerging trend toward processed agricultural products.

3 Southern Africa: Large Export Volume, with Potential Benefits Concentrated in Agricultural, Livestock and Fishery Products

Southern Africa ranks among the leading African regions in terms of export volume. In 2025, its exports to China reached approximately USD 32.9 billion, up 2.1% year on year. South Africa accounted for approximately USD 30.6 billion, or about 93% of the regional total, and remained broadly unchanged year on year, providing a solid foundation for regional exports. With the exception of Lesotho, countries in the region only began receiving preferential treatment on May 1, 2026, meaning that the policy window remains relatively short. Moreover, tariffs on major mineral exports such as platinum-group metals, chromium, and manganese were already close to zero. As a result, zero-tariff treatment is likely to have only a limited marginal impact on overall regional export volumes. The greatest potential benefits are instead expected in agricultural, livestock, and fisheries products that previously faced higher tariffs.

Namibia, for example, exported approximately USD 1.27 billion to China in 2025, up 52.1% year on year. Following the implementation of zero-tariff treatment, high-quality fishery products such as frozen fish from its Atlantic fishing grounds, which previously faced tariffs of 10%–12%, will see a direct improvement in price competitiveness. Botswana, supported by copper and nickel resources as well as grass-fed beef, exported approximately USD 720 million worth of goods to China in the first half of 2026, an increase of 73.5%, making it one of the region's faster-growing exporters. From January to July 2026, Southern Africa's exports to China totaled approximately USD 23.38 billion, up 24.2% year on year and accounting

for about 27.0% of Africa's total exports to China over the same period, ranking second among the five regions.

4 East Africa: Strong Policy Effects, with Coffee Leading the Way

East Africa exported approximately USD 13.6 billion to China in 2025, an increase of 11.7% year on year. Several least developed countries in the region began benefiting from preferential treatment as early as December 2024, allowing the benefits for agricultural exports to emerge relatively quickly. Coffee provides the clearest evidence of the policy effect: in 2025, China's total coffee imports from Africa reached approximately USD 582 million, 3.7 times the 2024 level. Ethiopia recorded the strongest country-level performance in the region. Its exports to China reached approximately USD 780 million in 2025, up 90.5% year on year, of which coffee accounted for around USD 495 million, nearly five times the previous year's figure, marking a historic breakthrough in its coffee exports to China.

As Chinese-invested companies become more involved in local sorting, roasting and warehousing, the benefits of zero-tariff treatment are expected to extend further upstream along the coffee value chain. Uganda demonstrates the potential for broader, multi-product growth. In 2025, its exports to China reached approximately USD 138 million, up 73.7%, with coffee exports doubling to USD 60 million. Dried chili peppers gained quarantine access to the Chinese market in September 2024, followed by the first shipment in 2026. Rwanda's fresh avocados exports received phytosanitary approval for entry into China in November 2025, providing further evidence of the East African model of combining premium agricultural products with newly secured market access.

From January to July 2026, East African exports to China totaled approximately USD 11.33 billion, up 41.6% year on year and accounting for about 13.1% of Africa's total exports to China. Agricultural exports from the region increased by 13.5% year on year during the same period, while China's coffee imports from Africa reached USD 434 million, up 35.3%, indicating that the benefits of preferential access are continuing to gain momentum.

5 Central Africa: Resource Products Dominate Overall Trade, with Institutional Pilots Taking the Lead

Central Africa exported approximately USD 47.8 billion to China in 2025, down 2.9% year on year, making it, together with North Africa, one of the two regions to record negative growth. This was mainly because the Democratic Republic of the Congo and Angola together accounted for 79% of the region's exports, with resource products making up more than 99% of the total. Their trade performance is therefore driven primarily by fluctuations in international commodity prices and production volumes rather than by tariff levels.

Institutional cooperation, however, merits particular attention. The Republic of the Congo was the first African country to sign an early-harvest arrangement with China. Its rules of origin rely primarily on product-specific rules, supplemented by a regional value-content threshold of at least 40%.²⁵ This provides an institutional example of how preferential tariffs can encourage local processing and offers a potentially replicable model for other African countries. Trade data also show a gradual increase in Central Africa's non-resource exports to China. Chad recorded its first shipments of sesame and peanuts in 2025, with exports to China reaching approximately USD 39 million from January to July 2026, a 39-fold increase. Gabon has also maintained stable exports of manganese

25 General Administration of Customs of the People's Republic of China (2026). GACC Announcement No. 33 of 2026 (Announcement on the Measures of the Customs of the People's Republic of China for the Administration of the Origin of Imported and Exported Goods under the Early Harvest Arrangement for the Agreement on Economic Partnership for Shared Development between the Government of the People's Republic of China and the Government of the Republic of the Congo). http://www.customs.gov.cn/customs/2026-03/31/article_2026033109382274134.html.

ore, timber and other products. From January to July 2026, Central Africa's exports to China reached approximately USD 32.16 billion, up 18.6% year on year

and accounting for about 37.1% of Africa's total exports to China over the same period, making Central Africa the largest of the five regions by export value.

2.3 Synergy Effects: From Tariff Elimination to Industrial Value Chain Integration

The deeper significance of zero-tariff treatment lies in its ability to activate three interconnected transmission channels. On the production side, extending the same duty-free treatment to both raw materials and processed goods creates institutional incentives for local processing and value-chain upgrading in Africa. On the distribution side, denser logistics corridors and overseas warehouse networks provide the infrastructure needed to support two-way flows of goods. On the consumption side, streamlined market-access mechanisms enable African specialty agricultural products to enter the Chinese market at scale, allowing the benefits of trade liberalization to reach producers at the grassroots level. Together, these three channels are helping shift China-Africa cooperation from a conventional buyer-seller relationship toward a model of joint development and value creation.

2.3.1 Supporting Agriculture and Livelihoods: Green Channels for African Specialty Agricultural Exports

The market opportunities created by zero tariffs are being transmitted to Africa's agricultural sector and farming communities through streamlined inspection and quarantine procedures. At the 2021 FOCAC in Dakar, China pledged to "establish green channels for African agricultural products entering the Chinese market". The core objective was to accelerate market-access procedures, prioritize risk assessment, and expand the

range of duty-free agricultural products eligible for import.

By June 2025, 31 types of agricultural and food product from 19 African countries had obtained market access to China. In 2026, following the inclusion of dried chili peppers, coffee beans, and cashew nuts, wild aquatic products from Africa also gained region-wide market access. At the local level, Changsha Customs introduced a pioneering pre-assessment system for African foodstuffs exported to China. The system allows risk assessments to be conducted in advance for products that enterprises intend to import but that have not yet obtained formal market access, thereby significantly shortening the approval process.

The combination of these policy measures has accelerated the growth of African specialty agricultural exports to China. From January to April 2026, China's imports of coffee increased by 137% year on year, and fruit and related products by 71.8%. In May, more than 80,000 tonnes of African sesame were imported through Qingdao Port in Shandong, an increase of more than 50% year on year. Between May and June, customs authorities in Shanghai recorded more than RMB 1.2 billion (approximately USD 165 million) in imports from the 53 African countries that benefited from preferential tariff treatment, resulting in tariff reductions of RMB 120 million. African fruit imports accounted for RMB 13.66 million of the preferential-value total, generating tariff savings

of RMB 1.72 million, while fresh-cut flower imports amounted to RMB 420,000, with tariff savings of RMB 50,000.²⁶ Through these green-channel mechanisms, zero tariffs are no longer merely a reduction on paper; they are being translated into tangible gains for farmers, agricultural producers, and local communities.

2.3.2 Strengthening Connectivity: International Logistics Corridors and Overseas Warehouses

Stable cross-border flows of African agricultural products and other goods depend on complementary logistics corridors and warehousing infrastructure. These form the critical link between Africa's ability to export and its ability to export reliably and at scale. The Hunan-Guangdong-Africa rail-sea intermodal transport service is China's first international logistics corridor specifically designed around trade with Africa. Since beginning operations in September 2021, it has handled more than 4,100 train services and 330,000 twenty-foot equivalent units (TEUs). Transit times in the outbound direction have been reduced from approximately 72 hours to 20 hours.²⁷ Alongside these logistics corridors, Chinese provinces and cities are also expanding overseas warehouse networks. Hunan has established 16 overseas warehouses in 13 African countries, all of which are now operational. Weihai, Shandong has established its East Africa Commercial and Logistics Center in Tanzania, integrating functions such as overseas warehousing, bonded logistics, and cross-border e-commerce. More than 1,300 Chinese and African enterprises have established a presence there, contributing approximately USD 400 million in additional

foreign trade in 2025.²⁸ Logistics corridors shorten cross-border transit times, while overseas warehouses facilitate local distribution and fulfillment in African markets. Together, they are creating a more sustainable two-way trade infrastructure, supporting a cycle in which African sellers can access Chinese consumers while Chinese buyers can source directly from African markets. This physical infrastructure also lays the groundwork for a broader shift from trade toward investment in productive capacity.

At the corporate level, the digital supply chain network of Beijing United Information Technology Co., Ltd. provides a representative example. The company has proposed a global expansion strategy comprising one integrated cross-border digital platform, seven overseas operating centers, and 50 overseas warehousing nodes. Africa is identified as a key region for the future expansion of this strategy. The supply chain network will provide services covering customs clearance, taxation, cross-border settlement, warehousing, and operations and maintenance. It is intended to respond to local industrial needs in Africa, establish distribution links among African farms, local manufacturing facilities, and cross-border trading entities, and expand export channels for locally produced agricultural and forestry products and mineral commodities. In terms of country-level operations, the company is developing a digital cloud warehouse in South Africa to support the circulation of minerals and building materials; establishing a joint venture in Tanzania to expand the local supply of agricultural inputs and cold-chain infrastructure; conducting direct procurement of commercial crops such as sesame and coffee in Kenya

26 See China Chamber of Commerce of Import & Export of Foodstuffs, Native Produce & Animal By-Products (2026). Overview of China's Imports and Exports of Agricultural Products with African Countries, January–April 2026. <https://www.cccfna.org.cn/maoyitongji/guobiemaoyi/ff8080819e6998d6019e-c8ea69541312.html>; Shanghai Going Global Comprehensive Service Platform (2026). "Zero-Tariff Express" Brings a Full Load of African Products into China. <https://segg.sh.gov.cn/ydyj/rdzt/20260630/2cd041bbf3384c5a80fa071f9faa9376.html>; DailyEconomic (2026). China's Zero-Tariff Policy for Africa Shows Significant Results Two Months after Implementation. <https://cn.dailyeconomic.com/2026/07/04/151549.html>.

27 Hunan Provincial Department of Transport (2026). Hunan–Guangdong–Africa Rail-Sea Intermodal Transport Corridor Selected as One of Hunan Province's First Batch of Typical Multimodal Transport Cases. https://jtt.hunan.gov.cn/jtt/xxgk/gzdt/szdt1/202605/t20260522_33983357.html.

28 Weihai Municipal People's Government (2026). 2025 Review • Major Economic Events | "Made in Weihai" Goes Global! East Africa Trade and Logistics Center Becomes a New Model for China-Africa Cooperation. https://www.weihai.gov.cn/art/2026/1/12/art_60663_6085865.html.

and Uganda; and advancing cooperation with Angola in agricultural input supply and mining-related supporting services.

2.3.3 Promoting Industrial Chain Cooperation: Using Zero Tariffs to Encourage Local Processing and Value-Added Exports

Traditionally, global tariff structures have often followed a tariff-escalation model, under which raw materials face relatively low duties while processed products are subject to higher tariffs. This has long constrained the development of downstream processing industries in Africa. China's comprehensive zero-tariff policy, by applying the same duty-free treatment to raw materials and processed products, effectively removes this tariff-induced cost differential. As a result, processing products locally before export can now be as cost-effective as, or more attractive than, exporting raw materials directly.

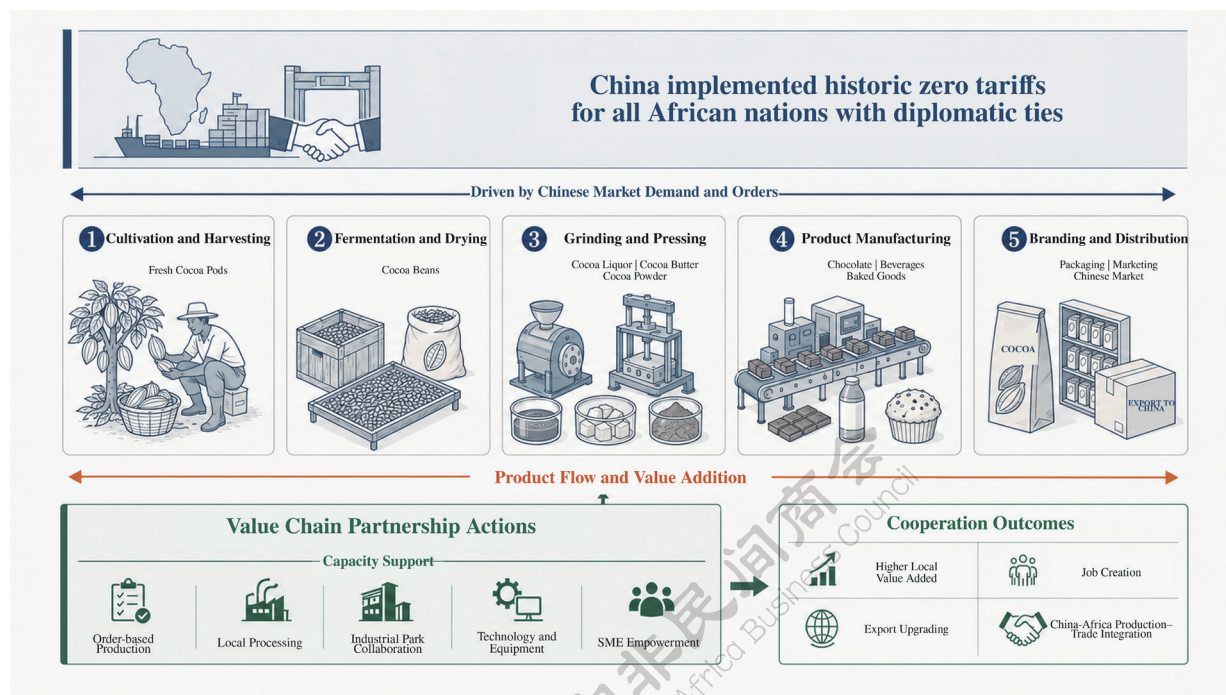
This policy incentive is already generating new forms of trade-and-investment integration. In Côte d'Ivoire, for example, Meilan Group has established five natural rubber processing plants with a combined processing

capacity of approximately 480,000 tonnes, accounting for around 30% of the country's processing capacity.²⁹ Its downstream products can access the Chinese, EU, and US markets by taking advantage of China's zero-tariff treatment, the Economic Partnership Agreement with the European Union, and the US African Growth and Opportunity Act (AGOA). In Ghana, Chinese capital and technology are increasingly entering the cocoa-processing sector (see Figure 6). From a broader perspective the potential for expanding local processing in Africa remains substantial. Intra-African trade currently accounts for only about 16% of the continent's total trade, compared with approximately 55% in Asia and 60% in Europe. Meanwhile, road transport costs for intra-African trade amount to around 29% of the value of the goods being transported,³⁰ while local processing capacity remains relatively underdeveloped. Zero tariffs therefore function as a critical policy lever, unlocking substantial potential for African economies to move up the value chain. In this sense, China–Africa cooperation is evolving beyond individual projects toward deeper engagement across entire industrial value chains, creating stronger external incentives for Africa's autonomous and sustainable economic development.

29 Hunan Provincial People's Government Portal (2025). China and Africa Acting Together, Pursuing Modernization | Hunan Enterprises Help Add Value to Africa's Rubber Industry. https://searchs.hunan.gov.cn/hnszf/hnyw/zwdt/202506/t20250608_33702004.html.

30 See WTO/FTA Consultation website, Ministry of Commerce of the People's Republic of China (2021). The Free Trade Area Is a Milestone in Africa's Economic Integration. <https://chinawto.mofcom.gov.cn/article/e/t/202101/20210103030310.shtml>; UNCTAD (2024). Economic Development in Africa Report 2024. <https://unctad.org/publication/economic-development-africa-report-2024>.

Figure 6 Illustrative Value-Added Upgrading along a Typical Agricultural Value Chain: The Case of Cocoa



2.4 Unlocking Potential: Removing Barriers and Improving Trade Channels

While zero-tariff treatment has removed tariff barriers, the realization of the full benefits continues to depend on overcoming a range of non-tariff barriers. Customs efficiency, sanitary and phytosanitary (SPS) procedures, mutual recognition of standards, logistics costs, and institutional capacity remain critical “last-mile” constraints determining whether the benefits of trade liberalization actually reach African exporters and Chinese importers. To address these bottlenecks, China and Africa are jointly developing a package of supporting mechanisms to ensure the steady release of the benefits of institutional opening-up.

First, customs clearance is becoming more efficient. Chinese customs authorities have launched a dedicated system for issuing certificates of origin for the African countries that maintain diplomatic relations with China,³¹ while China has established mutual Authorized Economic Operator (AEO) recognition arrangements with 15 African countries. These measures help reduce both clearance times and procedural uncertainty. Second, inspection and quarantine procedures are being aligned more closely. The two sides have established green channels and risk-based management mechanisms and are developing laboratories in key countries for testing products destined for the Chinese market. In Tanzania, 408 local

31 General Administration of Customs of the People's Republic of China (2026). GACC Announcement No. 54 of 2026: Announcement on the Measures of the Customs of the People's Republic of China for the Administration of the Origin of Imported Goods under Zero-Tariff Treatment for 20 African Countries That Have Diplomatic Relations with China and Are Not Least Developed Countries. http://www.customs.gov.cn/customs/2026-04/29/article_2026042908570039662.html.

enterprises have registered and obtained approval to export agricultural products to China. Third, standards alignment and mutual recognition are progressing in a structured manner. Through the China-Africa Center for Standardization Cooperation and Research, the two sides are conducting comparative assessments of standards for priority products such as coffee, cocoa, tea, and nuts. Where differences are limited, equivalent recognition can be pursued; where substantial differences remain, transitional arrangements can be introduced. This regulatory alignment reduces the hidden costs of trade by improving “soft connectivity” between markets. Fourth, digital tools and trade exhibitions are becoming

more permanent channels for market access. The China-Africa Sanitary and Phytosanitary (SPS) Cooperation Information Website is now operational, while initiatives such as the African Product Brand Bank, the African Products Online Shopping Festival, and dedicated African Products sections on e-commerce platforms are evolving from periodic promotional campaigns into more regular commercial channels. These initiatives are helping African specialty products establish more stable connections with Chinese consumers. Removing non-tariff barriers is therefore a critical institutional foundation for moving China-Africa trade beyond volume growth toward deeper, higher-quality integration.

Box 4 Key Measures Taken by African Countries Following the Introduction of Comprehensive Zero-Tariff Treatment

Following the implementation of comprehensive zero-tariff treatment on May 1 2026, African countries have moved proactively to expand access to the Chinese market, focusing on value-added processing, logistics connectivity, institutional arrangements, and inspection and quarantine procedures. Major coffee-producing countries such as Ethiopia have accelerated investment in roasting and sorting capacity, seeking to shift exports from green coffee beans toward roasted and other value-added products. Kenya has focused on improving logistics corridors. In March 2026, it launched its first “zero-tariff” export freight train, carrying 54 containers of Kenyan products via the Mombasa–Nairobi Standard Gauge Railway to the Port of Mombasa for onward shipment to China. Value-added products such as avocado oil are also processed locally in export processing zones. At the institutional level, several countries are seeking to lock in the benefits of zero tariffs through negotiations on Economic Partnership Agreements. The Republic of the Congo became the first African country to secure long-term zero-tariff treatment through such an agreement. Meanwhile, countries are accelerating the registration of enterprises exporting to China and the sanitary and phytosanitary certification required for access to China, with the aim of overcoming non-tariff barriers relating to customs clearance, quarantine, packaging, and related requirements. On the first day of implementation, 24 tonnes of South African apples, for which the applicable tariff was reduced from 10% to zero, entered China through the Shenzhen Bay Port as the country’s first preferential-duty import shipment under the new arrangements. These proactive efforts by African countries are accelerating the conversion of institutional market opening into tangible growth in two-way trade.



03

Core Drivers and Priority Areas: Unleashing New Momentum for China-Africa Investment

In June 2025, the Ministerial Meeting of Coordinators on the Implementation of the Follow-up Actions of FOCAC, together with the China-Africa Changsha Declaration on Upholding Solidarity and Cooperation of the Global South adopted at the meeting, documented for the first time that China was ready to work with Africa to further implement the Ten Partnership Actions and strengthen cooperation in priority areas such as green industries, e-commerce and payments, science and technology, and artificial intelligence. Building on the strategic consensus

of the Global South, to jointly advance modernization, this chapter focuses closely on Africa's core needs for industrialization, agricultural modernization, energy transition, and digital economic transformation. By focusing on extensive cooperation in priority areas such as green industries, e-commerce and payments, tech, and AI, it elucidates the new momentum driving the comprehensive expansion of practical cooperation between the two sides.

3.1 Green Industries: The Sustainable Transformation of China-Africa Production Capacity Cooperation

At the intersection of the global response to climate action and Africa's accelerated industrialization, China-Africa cooperation is both an extension of China's global footprint in new energy industries and an opportunity for Africa to break out of the "development-environment" binary dilemma. From clean energy to new energy vehicles, and from green infrastructure to sustainable manufacturing, cooperation between China and Africa is expanding beyond equipment supply into localized construction and operations.

3.1.1 Clean Energy Network Development and Localized Deployment of Microgrids

• Africa's Energy Challenges and Clean Energy Opportunities

Limited access to electricity has long been one of the constraints on Africa's industrialization and ability to improve living standards. As of 2025, nearly 600 million people in Africa still lacked access to electricity, accounting for about 43% of the continent's total population and over

80% of the global off-grid population.³² The International Energy Agency estimates that achieving universal electricity access in Africa by 2035 will require cumulative investment of almost USD 150 billion, or an average of USD 15 billion per year. However, in 2023 committed funding for new electricity access in Sub-Saharan Africa amounted to less than USD 2.5 billion.³³ Meanwhile, Africa possesses about 60% of the world's best solar resources, together with abundant wind, hydropower, and geothermal resources, making it one of the continents with the strongest renewable energy endowments globally and giving it natural advantages in addressing its energy challenges through clean energy. Against this backdrop, China is participating in the development of African power generation, transmission and distribution, and off-grid electrification projects across Africa through engineering contracting, investment and operation, and equipment supply.

Chinese enterprises have a long history of involvement in the development, construction, and operation of clean energy projects in Africa. In solar power, the Garissa Solar Power Plant in Kenya was built under an EPC contract by Jiangxi International Economic and Technical Cooperation Co., Ltd. in partnership with Jinko Solar Co., Ltd., and the 100 MW Jwaneng Solar Power Project

in Botswana was financed, constructed, and operated by a consortium established by China Harbour Engineering Company's Hainan branch, China International Water & Electric Corporation's Hainan branch, and local partners. These have now been connected to the grid, providing stable clean electricity to regional power systems.

In wind power, the De Aar Wind Power Project in South Africa, financed, constructed, and operated by CHN Energy Longyuan Power South Africa Branch, delivers approximately 760 million kWh of clean electricity annually, equivalent to saving more than 200,000 tonnes of standard coal.

In hydropower, the Karuma Hydropower Station in Uganda, built by Power Construction Corporation of China (POWERCHINA) under an EPC contract, makes full use of the hydropower resources of the Nile River and has significantly boosted local power supply capacity.

In geothermal energy, the Phase I Orpower 22 geothermal power plant of the Menengai Geothermal Project, financed, constructed, and operated by Kaishan Group Co., Ltd., has achieved more than 8,000 operating hours annually, supporting Kenya's progress toward its goal of achieving 100% clean energy power generation by 2030.

Box 5 Africa's Continental Renewable Energy Master Plan

African countries are accelerating the rollout of national renewable energy plans. In North Africa, Morocco has introduced a national renewable energy strategy, targeting a 52% share of renewables in installed power capacity by 2030. Egypt has released its *Integrated Sustainable Energy Strategy (ISES) 2035*, aiming to raise the share of renewable energy in electricity generation to 42% by 2030. South Africa updated its *Integrated Resource Plan (IRP)* in 2025, with plans to expand solar PV and wind power, add 5.2 GW of nuclear power capacity, and gradually reduce its reliance on coal-fired generation. In East Africa, Kenya is leveraging its geothermal resources to achieve 100% clean electricity supply by 2030. Uganda and Ethiopia

32 Empower Africa (2025). Africa's Energy Deficit: 600 Million People Still Lack Electricity. <https://empowerafrica.com/africa-by-the-numbers-600-million-africans-still-lack-electricity-2024/>.

33 IEA (2025). Financing Electricity Access in Africa. <https://www.iea.org/reports/financing-electricity-access-in-africa>.

are developing country-specific energy pathways drawing respectively on hydropower, geothermal, and solar resources. In West Africa, Nigeria has launched its *Energy Transition Plan (ETP)*, targeting net-zero emissions by 2060, while Ghana's *Renewable Energy Master Plan (REMP)* aims to reach 1,363 MW of installed renewable energy capacity and provide electricity access to 1,000 off-grid communities by 2030.

In recent years, solar-plus-storage has increasingly become a key solution for addressing the intermittency of solar power and enabling stable power supply at scale in Africa, helping drive a rapid expansion of Africa's solar PV industry. China's relatively mature solar PV industrial chain provides much of the hardware needed to accelerate solar deployment across Africa, making China the continent's leading source of imported solar modules. In 2025, Africa added approximately 4.5 GW of solar PV capacity, up 54% year on year, with the continent's ten largest markets accounting for around 90% of new installations. During the same period,³⁴ Africa imported 18.8 GW of solar modules from China, up 48% from 12.7 GW in 2024.³⁵ Egypt doubled its imports of Chinese solar modules to 2.3 GW, while Algeria recorded a sixfold increase to 2.1 GW. South Africa, Nigeria, and the Democratic Republic of the Congo each imported more than 1 GW of Chinese solar panels.³⁶ At the same time, falling module prices are reshaping the economics of electricity supply in Africa. In Nigeria, for example, a 420-watt solar module costs approximately USD 60 and can generate around 550

kWh of electricity annually, whereas the same amount spent on diesel at USD 0.66 per litre would generate only about 275 kWh. This translates into a payback period of roughly six months for the module itself.³⁷ As a result, distributed solar PV, off-grid microgrids, and large-scale utility projects are all becoming commercially viable, providing a practical pathway for Africa to harness its own green resources to narrow the electricity access gap. Lower hardware costs, however, do not automatically translate into new installations. Financing costs in Africa remain two to three times higher than in developed markets, while approximately 82% of clean-energy financing comes from public and development finance. This funding structure does not align well with the small-ticket, short-term, local-currency financing required by distributed energy markets. The gap between hardware supply and financing availability therefore represents an important area for further China-Africa cooperation in green investment and financing, localized production capacity, and project development capabilities.

34 GSC(2026). Global Solar Council: Africa Records Its Fastest Year of Solar Growth as Installations Rise 54% Year-on-Year. https://www.globalsolarcouncil.org/news/global-solar-council-africa-records-its-fastest-year-of-solar-growth-as-installations-rise-54-year-on-year/?utm_campaign=nigeria-s-solar-push-gains-scale-amid-grid-instability&utm_medium=referral&utm_source=www.234digest.com.

35 Ember (2026). Global Electricity Review 2026. <https://ember-energy.org/latest-insights/global-electricity-review-2026/>.

36 Ecofin Agency (2026). African Imports of Chinese Solar Panels Jump 48% in 2025. <https://www.ecofinagency.com/news/2304-54935-african-imports-of-chinese-solar-panels-jump-48-in-2025/>.

37 Ember (2025). The first evidence of a take-off in solar in Africa. <https://ember-energy.org/latest-insights/the-first-evidence-of-a-take-off-in-solar-in-africa/>.

Case 1 Energy China and China Gezhouba Group Corporation: Constructing South Africa's Largest Single-Site Solar PV project

The 240 MW Mooi Plaats Solar PV project in South Africa, constructed by a consortium of China Energy International Group and China Gezhouba Group Corporation, officially commenced commercial operation in March 2026. It is the largest single-site solar PV project built by a Chinese company in South Africa. Located near Noupoot in the Northern Cape Province, the project comprises a 240 MW solar PV farm, a supporting step-up substation, a switching station, and 11.2 kilometres of transmission lines for power evacuation. More than 410,000 solar modules have been installed, all using high-efficiency 680 Wp N-type bifacial modules to maximize the utilization of the region's abundant solar resources. Once fully operational, the plant is expected to generate approximately 700 million kWh of green electricity annually, equivalent to the annual electricity consumption of around 200,000 South African households. This will help alleviate the country's longstanding electricity shortages. Additionally, the project is expected to reduce carbon dioxide emissions by approximately 400,000 tonnes per year, contributing significantly to South Africa's efforts to optimize its energy mix and advance its green and low-carbon transition.

▪ Microgrids and Solar-Plus-Storage Solutions

Across Africa's vast rural areas, extending large-scale power grids is constrained by high costs, challenging geography, and other structural barriers, making centralised power supply less economically viable. Distributed renewable energy has therefore emerged as an important pathway for expanding electricity access. Microgrids and off-grid solar PV systems can operate independently without relying on the main grid. Their short installation cycles, relatively low operation and maintenance costs, and flexible scalability according to user demand make them an important complementary solution to Africa's energy challenges.

China's technological expertise in distributed solar PV, microgrids, and energy storage is highly aligned with Africa's needs. Modular, low-cost, and scalable clean-energy solutions offer potential for deployment across a wide range of African contexts, and solar-plus-

storage solutions have already been adapted to diverse applications. The Solar Demonstration Village Project in Mali, undertaken by China Geo-Engineering Corporation, installed 1,195 off-grid solar home systems in local villages, providing reliable basic electricity access to more than 10,000 residents. In Cameroon, with technological and resource support from Chinese enterprises, nearly 500 rural off-grid solar PV power stations have been built, providing electricity to large numbers of people deprived of connections to the main grid. StarTimes has also developed off-grid small-scale solar PV businesses in Kenya, Zambia, and other African countries, providing lighting and basic electricity services to tens of thousands of households. JA Energy Storage, JA's energy storage subsidiary, has developed an integrated solar-storage-diesel microgrid project in Kenya, enabling local farms and bakeries achieve nearly 100% self-consumption while reducing their per-kWh electricity costs by approximately 50%.

Case 2 SANY Silicon Energy: Investing in a Solar-Storage-Diesel Microgrid for Ruida Mine in Zambia

The solar-storage-diesel microgrid project at Ruida Mine in Zambia, undertaken by SANY Silicon Energy, is Africa's first and, to date, largest single-site solar-storage-diesel mining microgrid project. It is designed to establish a reliable, green, and highly efficient model for powering mining operations. Phase I achieved initial grid connection in late December 2024, with 13 MWp of solar PV capacity, 39 MWh of energy storage, and a diesel generation backup system. Phase II further developed a microgrid architecture comprising a 12 MWp solar PV system, a 36 MWh battery energy storage system, and a 2.4 MW diesel generator. Following integration with Phase I, the project's total capacity was expanded to 20 MWp of solar PV and 60 MWh of energy storage. Green electricity accounts for more than 95% of the project's power supply, with annual generation of approximately 30 million kWh. The project has helped the mine reduce its electricity costs to one-third of their previous level, saving approximately RMB 40 million in power costs annually and providing stable and reliable green power across the entire mining value chain, from extraction to mineral processing. In January 2025, a delegation from the local government of Kasempa district visited the project site and commended its design concept, construction efficiency, and engineering quality. Through projects such as Ruida Mine, SANY Silicon Energy has become one of Zambia's important private-sector investors in renewable energy.

3.1.2 Extending the New Energy Vehicle and Battery Industries into Africa's Green Industrial Hubs

• Development and Processing of Critical Green Minerals

Africa holds approximately 30% of the world's key mineral reserves and is a major global source of a range of critical minerals, including cobalt, manganese, platinum-group metals, and lithium. These minerals are essential raw materials for new energy vehicle (NEV) batteries, energy storage systems, and clean energy equipment.³⁸ African countries are accelerating the transition from raw mineral exports toward higher-value, locally based green processing. Countries such as the Democratic Republic of the Congo and Zimbabwe have introduced restrictions or bans on the export of unprocessed minerals. At its

38th Ordinary Session of the Assembly in February 2025, the African Union adopted Africa's Green Minerals Strategy (AGMS). The strategy seeks to move African economies beyond resource extraction and exports toward greater participation and value creation across global value chains. As this transition gathers pace, Chinese companies are increasingly moving beyond their traditional role as mineral buyers to become partners in Africa's green industrialisation. Leveraging the Belt and Road Initiative, they are participating in key nodes such as the DRC's Copperbelt and Zimbabwe's lithium industry, helping extend local value chains beyond extraction into mineral beneficiation, refining, and processing.

• Localization of the New Energy Vehicle Industry Chain

Chinese new energy vehicle (NEV) companies are accelerating the localization of their industry chains across Africa, gradually expanding from upstream resource

38 UNU-INRA (2026). Africa Redefining Critical Minerals for a Shared Future: South-South Solidarity in Action. <https://unu.edu/inra/report/new-unu-inra-report-critical-minerals>.

processing into battery materials manufacturing, vehicle assembly, and charging services. In upstream processing, Zhejiang Huayou Cobalt Co., Ltd. has established Africa's first lithium sulphate processing plant in Zimbabwe, helping shift the country's lithium industry from the export of lithium concentrate toward higher-value processing for battery materials.

Owing to its geographical location, industrial policies, and favourable export conditions, Morocco is emerging as a major hub in Africa for Chinese new energy companies in battery materials and cell manufacturing. Companies including Gotion High-Tech, CNGR Advanced Material, and Zhejiang Huayou Cobalt have established or announced projects involving lithium iron phosphate (LFP) materials and battery cells here. Among them, the first-phase 40,000-tonne battery materials unit at CNGR's CNGR Morocco Industrial Base has commenced production. The wider complex is being developed in phases, with a planned final battery-equivalent capacity of approximately 70 GWh per year.

In vehicle manufacturing, Geely has established its first CKD assembly plant in the Middle East and Africa in Egypt. Nigeria has signed an agreement with Shanghai Launch Automotive Technology Co., Ltd. to develop two electric vehicle manufacturing plants in Lagos and Abuja, with a combined annual production capacity of 70,000 vehicles. Dongfeng Motor has partnered with Kenya-based ePureMotion to launch the ePureCitie battery electric passenger vehicle, currently supplied primarily through fully built-up vehicle imports, with

plans to leverage the AVA facility in Mombasa for local assembly. In supporting infrastructure, BYD is working with South Africa's state-owned electricity utility, Eskom, to install 200–300 fast-charging stations by the end of 2026. The NEV operations of Chinese companies in Africa are therefore moving beyond simple vehicle exports toward an integrated value-chain presence spanning resource processing, battery-material production, vehicle assembly, and charging services.

Given the unstable power supply, inadequate charging infrastructure, and significant electricity price fluctuations in some African countries, Chinese NEV companies are adopting development strategies more closely tailored to local market conditions. On the product side, companies are prioritizing hybrid vehicles to reduce the consumer's dependence on charging infrastructure, while improving product adaptation to local road conditions, operating costs, and after-sales requirements. On the infrastructure side, they are pursuing an integrated model combining vehicle sales with charging-station development, designed to address infrastructure constraints that could otherwise hinder NEV adoption. On the operational side, companies are strengthening local production, after-sales maintenance, spare-parts supply, and their capacity to serve broader regional markets. Overall, Chinese NEV companies in Africa are shifting from a model centred on standalone product exports toward localized value chains and locally embedded operations. This shift strengthens their market competitiveness and provides an industrial foundation for the large-scale and sustainable development of Africa's new energy mobility sector.

Case 3 BYD: Advancing the Localization of Africa's New Energy Vehicle Industry Chain

BYD is working with local companies across multiple African countries to advance local vehicle assembly, battery supply, and charging-network development.

In Kenya, BYD supplies K6 electric buses to local operator BasiGo in semi-knocked-down (SKD) form, with final assembly carried out at a local facility before the buses enter Nairobi's public transport system. In South Africa, BYD has introduced new energy passenger vehicles such as the ATTO 3 and supplied 120 electric buses to Cape Town-based public transport operator Golden Arrow. The company has also announced plans to build 200–300 fast-charging stations by the end of 2026. In Nigeria, BYD has partnered with LOXEA, a subsidiary of CFAO Mobility, to introduce electric vehicles including the ATTO 3 and Dolphin. LOXEA serves as the exclusive distributor and is also developing supporting charging infrastructure and a standardized after-sales service network. In Rwanda, BYD has become a major battery supplier to local electric motorcycle company Ampersand, helping accelerate the electrification of Africa's commercial motorcycle sector.

Together, these partnerships are bringing local assembly, charging infrastructure, and battery supply to African markets, strengthening the supporting ecosystem for the development of the continent's NEV industry.

Box 6 New Energy Vehicle Policies in African Countries

African countries are showing a growing commitment to environmental protection and the energy transition, with many governments introducing supportive policies to advance new energy mobility and the broader energy transition.

Egypt plans to build 42,000 charging stations and invest EGP 2.5 billion in cooperation with foreign automakers to establish domestic electric vehicle production lines. Kenya launched a nationwide "Electric Mobility" policy in 2023 to promote green transport and reduce air pollution. In early 2024, South Africa released its *Electric Vehicles White Paper*, offering tax incentives of up to 150% of qualifying research and development expenditure on locally developed electric vehicles, while promoting supporting industries such as batteries and green hydrogen. The Nigerian government has designated the entire new energy vehicle value chain as a national development priority and reduced import duties on electric vehicles from 5% to zero. Morocco aims to meet 52% of its electricity demand from renewable energy sources by 2030.

3.2 E-Commerce and Digital Payments: Reshaping Two-Way Trade and Inclusive Finance Networks

Mobile payments and e-commerce have expanded across Africa at a faster pace than traditional banking networks, becoming important drivers of economic digitalisation. China's technological capabilities and operational experience in digital payments and e-commerce are increasingly aligned with the needs of African markets, with cooperation spanning payment infrastructure, cross-border settlement, and digital platform services.

3.2.1 Mobile Payments and Digital Finance: Cross-Border Mobile Payment Platforms and Inclusive Finance Innovation

Cross-Border Payments and Digital Credit: Inclusive Financing Solutions for Micro and Small Enterprises

Africa is at a critical juncture in its digital transformation and regional economic integration. In 2025, mobile technologies and services contributed approximately USD 240 billion to Africa's economy, equivalent to 7.8% of GDP, and supported around 13 million jobs. At the same time, approximately 62% of adults in Sub-Saharan Africa do not have a formal bank account, and 88% have never borrowed from a formal financial institution. Globally, the credit gap for micro and small enterprises (MSEs) stands at USD 4.9 trillion, with the financing constraints particularly pronounced in Africa. Against these structural gaps, China-Africa cooperation in financial technology has continued to grow, giving rise to a number of large-scale initiatives across multiple countries aimed at improving

the efficiency of cross-border payments and expanding access to digital credit.

For cross-border payments, UnionPay International (UnionPay)'s acceptance network now covers 51 African countries and markets. In 15 markets, including Kenya and Morocco, merchant and ATM acceptance is effectively comprehensive, while ATM coverage exceeds 70% in five markets, including Ghana and Kenya. More than 6 million UnionPay cards have also been issued across 13 countries and markets, including Kenya, Uganda, and Mauritius.³⁹ Alipay+ (Ant Group) provides technology and operational capabilities to local African digital wallets. In South Africa, for example, the telecom operator Vodacom's VodaPay super app was developed through this cooperation, using a mini-program architecture to integrate payments, shopping, and everyday services. XTransfer (Shanghai Duochang Network Technology), one of the world's top 100 cross-border payment providers, focuses on serving B2B trade between China and Africa. It helps African importers reduce settlement costs associated with correspondent banking intermediaries while supporting transactions denominated in local currencies and settled in renminbi (RMB). PayEase has developed dedicated payment and collection solutions tailored to African markets, enabling rapid remittances, with funds typically credited within the same business day (T+0), while providing unrestricted foreign-exchange conversion subject to applicable regulations.

39 China UnionPay (2025). Supporting a New Chapter of African Development under the G20: UnionPay Builds Financial Bridges to Facilitate China-Africa Payments. <https://cn.unionpay.com/upowhtml/cn/templates/newInfo-nosub/7885004da382485e8bde5a0ba000fdd3/20251122145155.html>.

Case 4 XTransfer: Building Cross-Border Payment Infrastructure for China-Africa SME Trade

XTransfer is accelerating its expansion across Africa, with its business primarily focused on cross-border payment and collection services for small and medium-sized enterprises (SMEs). In September 2023, XTransfer launched a local payment collection service in Africa and subsequently introduced local collection accounts in Nigeria, allowing African buyers to pay directly in local currency without converting funds into US dollars. In February 2025, XTransfer signed a memorandum of understanding with Ecobank, a pan-African banking group. By leveraging Ecobank's extensive payment network across Africa, the partnership provides African SMEs engaged in international trade with cross-border financial and risk management services, while facilitating trade between China and African countries. According to company disclosures, XTransfer's year-on-year foreign trade collections from Africa almost tripled in 2025, while year-on-year collections from Africa in the first quarter of 2026 more than doubled. Ecobank Group CEO Jeremy Awori stated that integrating XTransfer's advanced solutions with Ecobank's pan-African payments platform, the two companies would simplify payment processes and reduce transaction costs, enabling African businesses to participate more effectively in global trade.

On the digital credit side, OPay has approximately 60 million users and hundreds of thousands of offline agent outlets in Nigeria. Serving individual merchants, transport workers, and other small-scale operators, the platform uses transaction histories to assess creditworthiness and provide unsecured microloans. PalmPay, with 35 million registered users and 1.1 million agents, similarly uses transaction data to build digital credit profiles for micro and small business owners and provide them with working-capital loans.

Case 5 PalmPay: Advancing Mobile Payments and Financial Inclusion in Africa

PalmPay is a mobile payment platform operated by Transsnet, a joint venture between Shenzhen Transsion Holdings and NetEase. In 2019, it obtained a Mobile Money Operator licence from the Central Bank of Nigeria and officially launched in Nigeria that year. PalmPay leveraged Transsion's TECNO, Infinix, and itel smartphone brands and retail channels to promote its application, while attracting users through low-fee or fee-free transfers, airtime cashback, and other incentives. It also built an extensive network of agents, merchants, and Point of Sale terminals to address challenges related to cash deposits and withdrawals as well as trust in offline transactions. In 2024, PalmPay introduced an Unstructured Supplementary Service Data service in Nigeria to reach users without smartphones. In 2025, it partnered with Verve, Africa's largest domestic card scheme, to launch debit cards. This marked a transition from a standalone mobile wallet toward a broader digital banking platform offering payments, savings, credit, insurance, and physical card services. PalmPay has since replicated this model in Ghana, while entering the Tanzanian market through smartphone instalment financing. Through smartphone financing, digital banking, and B2B payment services, the company is continuing to expand its footprint across Africa. By combining convenient digital accounts with an extensive agent network spanning both urban and rural areas, PalmPay has enabled previously unbanked users to access digital accounts and basic financial services. However, credit pricing, data use, and consumer protection on such platforms remain subject to local regulatory frameworks.

3.2.2 Cross-Border E-Commerce: Cross-Border E-Commerce Drives Exports of African Products to China

Explosive Growth in Africa's Cross-Border E-Commerce Market

Africa's e-commerce market is entering a period of relatively rapid growth. Statista projects that the African e-commerce market will reach US\$56 billion by 2029, representing a compound annual growth rate (CAGR) of 8.46% between 2025 and 2029.⁴⁰ In 2025, Africa's B2B cross-border e-commerce entered a period of particularly rapid growth, with annual transaction value reaching USD 42.4 billion, up 31.5% from USD 32.2 billion in 2024, significantly outpacing the global growth rate of 18%. Order volumes reached 170 million, an increase of 48% year on year. South Africa, Egypt, Kenya, and Nigeria together accounted for more than 65% of total transaction value.⁴¹ Approximately 34% of sellers on Jumia, one of Africa's leading homegrown e-commerce platforms, are based in China, accounting for roughly one-third of the platform's merchandise sales.⁴²

• From Selling "Made in China" to Africa to Selling African Specialty Products to China

The development of digital cross-border e-commerce infrastructure is creating more efficient channels for two-way trade between China and Africa. For many years China-Africa trade has been structurally imbalanced: China has primarily exported manufactured goods, while

African exports to China have remained concentrated in primary commodities, with relatively limited channels for distinctive African products to reach Chinese consumers. As China-Africa economic and trade cooperation mechanisms have continued to develop, e-commerce is helping establish a new model of two-way trade in which African specialty products can reach the Chinese market directly. As a pilot zone for In-Depth China-Africa Economic and Trade Cooperation, Hunan province has continued to develop supporting platforms and organize dedicated promotional initiatives. During the first half of 2025, Hunan launched the African Goods Online Shopping Festival,⁴³ featuring a series of initiatives including pop-up stores, supermarket promotions, livestreaming campaigns, and integrated exhibitions. By combining online and offline channels, these initiatives helped bring high-quality African products to Chinese consumers. By the end of 2025, the products promoted through these initiatives had generated nearly RMB 20 million in combined online and offline sales. In May 2026, the China-Africa Economic and Trade Expo launched the African Product Brand Bank initiative, bringing more than 120 African-branded products into the Chinese market across categories including coffee, wine, nuts, dried chillies, and sesame oil.⁴⁴ African students and local African content creators have also used short-form videos, livestream commerce, and other digital media to promote African products on an ongoing basis. As a result, specialty agricultural products such as Ethiopian coffee, Kenyan black tea, Ghanaian cocoa products, and Mozambican nuts are gaining greater visibility among Chinese consumers.

40 StatTimes (2025), "E-commerce in Africa, Unlocking New Paths for Economic Growth," <https://www.stattimes.com/e-commerce/e-commerce-in-africa-unlocking-new-paths-for-economic-growth-1354446>.

41 Dashu Cross-Border (2026), "2025 Annual Review of B2B Cross-Border E-Commerce in Africa: Breakthroughs in Infrastructure, Product Categories, and Ecosystems, with Chinese Companies Reshaping a New Blue Ocean for Global Growth," <https://www.10100.com/article/45175893>.

42 China Cross-Border E-Commerce Trade Fair (2026), "Africa: The Last Untapped Market for Cross-Border E-Commerce," <https://www.kuajiaohuexpo.com/1451.html>.

43 The "Quality African Products" public brand was selected as a national exemplary practice case for "Silk Road E-commerce," while the "Quality African Products Online Shopping Festival" was included among the cross-border e-commerce practice cases of the 2025 World Internet Conference.

44 Hunan Provincial People's Government (2025), "China-Africa Economic and Trade Cooperation: Advancing Together toward the Dream of Modernization," http://www.hunan.gov.cn/hnszf/hnyw/zwdt/202506/t20250612_33707275.html.

Case 6 Alibaba: Using the eWTP to Promote Digital Trade and African Agricultural Exports

The Electronic World Trade Platform (eWTP), an initiative launched by Alibaba, uses Ethiopia and Rwanda – the first African country to participate in the initiative – as key hubs. Through e-commerce platforms, cross-border logistics, digital payments, and talent training, it helps African SMEs access global markets. In agricultural exports, eWTP has helped Rwandan coffee reach Chinese consumers through Tmall Global. Its “Volcano Hunter” chilli peppers are processed locally before being further processed by Freshippo into chilli sauce in China, doubling the income of participating chilli farmers. Ethiopian coffee has not only been sold through Tmall Global but has also reached consumers directly through Freshippo’s X Membership Stores. This model has enabled consumers to purchase Ethiopian coffee at prices approximately 30% below prevailing market prices while increasing coffee farmers’ incomes by around 30%. By reducing the number of intermediaries involved in traditional trade, the model enables local producers to move beyond the sale of primary commodities toward higher-value activities such as processing, branding, marketing, and contract farming. Rwandan President Paul Kagame has praised the eWTP for helping young people and farmers in Rwanda connect more directly with consumers.

3.3 Technology: Local Digital Infrastructure and the Digital Transformation of Traditional Industries

The latest wave of technological innovation is converging with Africa’s accelerating digital transformation. From digital infrastructure to agricultural technology, China’s relatively comprehensive digital technology ecosystem and experience in large-scale deployment are providing potentially replicable approaches for strengthening Africa’s endogenous technological capabilities.

3.3.1 Local Digital Infrastructure: From Telecommunications Networks to Domestic Computing Capacity

• Building Africa’s “Information Superhighway” through Telecommunications Infrastructure

Chinese companies, often working with African partners, are accelerating investment in Africa’s digital infrastructure, providing the connectivity foundations for the expansion of mobile payments, e-commerce, and digital services. The Forum on China-Africa Cooperation Beijing Action

Plan (2025–2027) identifies the digital economy as a key area of cooperation and is accompanied by the Plan of Actions on Jointly Building a China-Africa Community with a Shared Future in Cyberspace (2025-2026), which sets out a systematic framework for cooperation in digital and communications infrastructure. The Action Plan calls for greater cooperation between Chinese telecommunications equipment manufacturers, network-construction companies, and their African counterparts. It encourages Chinese telecom operators to participate in the investment and construction of international submarine cable projects in Africa, and supports cooperation between Chinese companies and African telecom operators on 5G deployment. It also promotes the development of 5G networks and innovative applications, with the aim of improving African countries’ digital connectivity and international interconnection capacity.

Core submarine cable and terrestrial projects involving

Chinese enterprises have expanded both Africa's international bandwidth and its domestic connectivity. For example, the 2Africa submarine cable project, jointly developed by a consortium of international partners including China Mobile International, was launched in 2020, with the main system completed in November 2025. The cable spans Asia, Africa, and Europe and forms an almost continuous ring around the African continent, providing dozens of countries along its route with low-latency, high-quality end-to-end connectivity. This has helped overcome a major infrastructure barrier to the development of Africa's digital economy.

At the same time, Chinese enterprises are actively expanding cooperation with African telecom operators

on 5G deployment. For example, Huawei designed and built Nigeria's "Galaxy Backbone" network and has also participated in the country's 5G network development, while ZTE and other enterprises showcased solutions including private 5G network at GITEX AFRICA 2026 in Morocco. Under the FOCAC framework, as of 2023, Chinese enterprises had helped African countries build or upgrade approximately 150,000 kilometres of telecommunications backbone networks, providing network services to nearly 700 million users. They had also built more than 50% of Africa's wireless sites and high-speed mobile broadband networks, laid more than 200,000 kilometres of fibre-optic cable, and provided services to more than 900 million people across the continent.

Case 7 Huawei: Developing 5G Networks in South Africa

Through network deployment partnerships with South African telecom operators, Huawei has gradually developed a 5G footprint spanning both public broadband and industry-specific private networks. In 2019, South African data operator Rain launched the country's first commercial 5G network using Huawei's end-to-end equipment in the 3.6 GHz band. In 2020, the two companies launched Africa's first commercial 5G standalone (5G SA) network in Cape Town, supporting technologies such as network slicing and mobile edge computing. Huawei subsequently partnered with Telkom in 2022 to launch a high-speed 5G internet network, initially providing 5G fixed wireless access services.

In 2025, Huawei, MTN, and China Telecom launched a 5G private-network project for the mining sector in South Africa's Northern Cape Province, supporting applications including personnel monitoring, vehicle tracking, and autonomous haulage. In 2026, Huawei and Rain further began deploying a low-band Massive Multiple-Input Multiple-Output (MIMO) 5G network, which now provides large-scale coverage in major South African cities. Compared with conventional 4T4R equipment, uplink and downlink coverage will improve by 5 dB and 3 dB respectively, while network capacity can increase by up to threefold. These deployments have expanded high-speed broadband coverage for households and enterprises while also promoting the transformation of pillar industries such as mining in South Africa toward smarter and safer operations.

Case 8 PEACE: A Digital Silk Road Submarine Cable Linking Asia, Africa, and Europe

The PEACE (Pakistan and East Africa Connecting Europe) submarine cable is one of the world's most important intercontinental communications infrastructure projects and a flagship example of Chinese participation in the development of international submarine cable networks. HMN Technologies, a subsidiary of Hengtong Optic-Electric, serves as the system supplier for the project, with a total investment of more than RMB 2.8 billion. The initial core system spans approximately 12,000 kilometres; including subsequent extensions and branch routes; the overall network is approximately 21,500 kilometres long. The system runs from Pakistan through countries in the Horn of Africa and East Africa, including Djibouti, Egypt, and Kenya, with an East African branch reaching the Port of Mombasa in Kenya, before ultimately connecting to Marseille, France. The submarine cable uses Huawei's cutting-edge 200G wavelength-division multiplexing (WDM) transmission technology, with a designed capacity of 16 Tbps per fibre pair. It significantly reduces communications latency and bandwidth costs between Asia, Africa, and Europe while providing countries in East and North Africa with high-speed, reliable international connectivity. The project therefore provides important infrastructure support for the continued development of Africa's digital economy.

• Data Centres and the Development of Local Computing Capacity

Data centres are emerging as the core infrastructure supporting cloud computing, big data, and artificial intelligence applications – a new focal point in China–Africa digital cooperation. Since 2022, ZTE has participated in the development of ten data centres across eight African countries, including a supercomputing centre in Tunisia and a data centre for government ministries in Algeria.⁴⁵ In May 2024, Huawei Cloud launched a Tier III-certified data centre in Egypt's Smart Village, making it Huawei's first locally based public cloud platform in North Africa. Drawing on Egypt's telecommunications network and connectivity to more than 60 countries worldwide, the

facility provides cloud computing services to businesses and young people across North, West, and Central Africa.⁴⁶

In June 2024, the Botswana Digital Delta Data Center, constructed by Jiangxi International Economic and Technical Cooperation Co.,Ltd., commenced operation. The country's first national-level data centre, it provides large-scale data storage capacity for government and commercial users while reducing data-transfer costs for local internet users.⁴⁷ At present, Africa accounts for only 0.6% of global data-centre capacity.⁴⁸ Its share remains disproportionately low relative to the continent's population and economic weight, indicating that the African data-centre market is still at an early stage of

45 ZTE Telecom Review Africa (2025). ZTE's Darren Zhao on Driving Africa's Digital Transformation with Connectivity, Computing Power, and AI. <https://www.telecomreviewafrica.com/articles/general-news/11390-ztes-darren-zhao-on-driving-africas-digital-transformation-with-connectivity-computing-power-and-ai>.

46 Developing Telecoms (2024). Telecom Egypt and Huawei Cloud announced a first for North Africa. <https://developingtelecoms.com/telecom-technology/telecom-cloud-virtualization/16741-telecom-egypt-and-huawei-cloud-announced-a-first-for-north-africa.html>.

47 Jiangxi International Economic and Technical Cooperation Co. (2026), "People's Daily Features Jiangxi International's Botswana National Data Centre Project," http://drc.jiangxi.gov.cn/jxsfzhggwyh/col/col14688/content/content_2015982276663316480.html.

48 Africa Data Centres Association (2026). Data Centres in Africa 2026: The Economic Report. <https://africadca.org/en/data-centres-in-africa-2026-the-economic-report>.

expansion.

3.3.2 Agricultural Technology: Applications of the Internet of Things and SaaS Solutions to Traditional Farming

In recent years, China and African countries have developed a range of cooperation initiatives in agricultural digitalisation. Huawei has deployed Internet of Things (IoT) devices in cotton-growing areas of Zambia, enabling digital management across the entire production cycle from planting to harvesting. In remote areas of northern Côte d'Ivoire, Huawei has also deployed its RuralStar solution, enabling farmers to access agricultural information and sell agricultural products through mobile connectivity. In May 2025, the China International Development Cooperation Agency (CIDCA) and the International Fund for Agricultural Development (IFAD) signed an agreement to support the Leveraging Satellite-based Digital Solutions for Climate-Resilient Agriculture (SAT-CARE) Project in Tanzania. The project directly benefits 5,000 smallholder farmers and is expected to indirectly reach as many as one million farmers nationwide.⁴⁹ In October of the same year, the inaugural General Assembly of the China–Africa Agricultural Science and Technology Innovation Alliance (CAASTIA-GA 2025) was held at the African Union headquarters in Addis Ababa. Its 91 founding member institutions cover 23 countries across Africa's five subregions.⁵⁰ The conference released a three-year action plan and the alliance's first batch of joint projects, focusing on areas including agricultural robotics, smart equipment, green crop protection, and digital innovation.

Alongside the continued improvement of national-level cooperation mechanisms, local governments and institutions are also exploring ways to translate these initiatives into concrete programmes. Hubei Province, for example, has developed a multi-level framework for agricultural science and technology cooperation with Africa. The China–Africa Innovation Cooperation Centre, based in Wuhan, brings together innovation resources from across China and has established six branch centres in Africa to support China - Africa technology cooperation nationwide. Hubei Ceres Technology Co., Ltd., a key agricultural technology partner of the platform, has introduced AI-assisted breeding at its Hubei Ceres Science and Technology Park, reducing conventional breeding cycles from eight years to three. The company is also conducting variety screening tailored to African climatic conditions. Hubei University has been given approval to establish the “China-South Africa Belt-and-Road Joint Laboratory of Molecular Breeding for High-Quality Agricultural Products”, working with South Africa's Tshwane University of Technology on molecular breeding and sustainable agricultural development. Hubei University of Technology has also established joint laboratories with Eduardo Mondlane University in Mozambique and Al-Azhar University in Egypt, focusing on new models of photovoltaic agriculture and the discovery and utilisation of natural bioactive peptides. These initiatives provide an institutional bridge for Hubei's broader efforts to advance agricultural science and technology cooperation with Africa.

49 People's Daily / Workers' Daily (2025), "International Perspective: African Countries Accelerate Agricultural Digital Transformation," <https://www.workercn.cn/c/2025-08-06/8575410.shtml>.

50 Chinese Academy of Agricultural Sciences / African Academy of Sciences (2025), "China–Africa Alliance Sets New Milestone for Agricultural Innovation at CAASTIA General Assembly," <https://ciar.caas.cn/en/NewsRoom/LatestNews/b143b1230c7b498e8bbf98e4e77e045e.htm>.

Case 9 StarWin, Guodian Gaoke and Q-KON: Bringing Satellite IoT Connectivity to Remote Areas of South Africa

In December 2025, Chinese satellite communications company StarWin entered into a three-way partnership with Guodian Gaoke and South African digital services provider Q-KON. Under the partnership, StarWin provides high-performance satellite IoT ground terminal solutions that comply with South Africa's stringent telecommunications regulatory requirements, facilitating the deployment of the Apocalypse satellite constellation in Africa. The initiative is designed to provide reliable data connectivity across eight key sectors in South Africa, including agriculture, mining, and logistics.

At present, 30% of pilot farms in South Africa have been connected to the terminal system, covering a range of agricultural applications from citrus production for export to domestic grain cultivation. Farms equipped with the terminals use IoT sensors to monitor soil moisture, temperature, pH levels, and even crop-level health indicators in real time, enabling more precise irrigation and fertilisation and improving agricultural productivity. The combination of satellite IoT and positioning technologies also enables real-time tracking and geofencing for large agricultural machinery and livestock, strengthening both operational safety and farm-management efficiency.

3.4 Artificial Intelligence: Frontier Technologies Empower Africa's Modernization

Artificial intelligence is emerging as a potential driver of transformative growth in Africa, offering new ways to address structural development constraints. From the sharing of open-source large model technologies and digital infrastructure to AI-enabled smart agriculture and intelligent logistics, China's growing strengths in AI technologies, industries, and applications are increasingly being connected with Africa's digital transformation and industrial needs through open-source sharing and local adaptation.

3.4.1 Digital and Intelligent Infrastructure: Promoting the Development of Large Models and AI Ecosystems

Chinese AI large models are gaining traction in African markets. In language-AI adaptation, Huawei launched an Arabic-language foundation model in Egypt, adapting speech recognition and natural-language processing

capabilities to Arabic. Alibaba Cloud has entered into a strategic partnership with African integrated-services platform Hakuna Matata and, using Qwen3.5 as its technological base, launched what it describes as Africa's first vertical-industry large model, with enhanced semantic understanding of African languages including Swahili, French, and Hausa. In the wider adoption of AI applications, DeepSeek's low-cost open-source model has significantly lowered the barriers to AI adoption in Africa. Other Chinese large models such as Alibaba Tongyi's Qwen are also reaching local users through multilingual support and localized adaptation, leveraging Transsion Holdings' extensive distribution channels in Africa's smartphone market.

At the same time, Chinese large models are being integrated into key sectors in Africa, including healthcare, agriculture, and education. Peking University Third Hospital, Peking University's Institute for Artificial

Intelligence, and other institutions have jointly developed the “Xihe-1” medical large model based on Africa’s healthcare needs. Huawei’s Pangu model has been used in collaboration with a non-governmental organization in Madagascar to deploy the Mitao Forecast precision weather forecasting model. Uganda has launched the Sunflower model based on Alibaba’s Qwen, supporting translation into local languages and the generation of educational resources.

Robert Lisinge, Director for the Technology, Innovation,

Connectivity and Infrastructure Development Division of the United Nations Economic Commission for Africa, has stated that China’s open-source models have substantially reduced the cost of access to data and technology for African universities and research institutions, enabling local scientists to develop practical digital solutions tailored to agriculture, education, healthcare, and other sectors. Such applications can generate tangible socioeconomic benefits, particularly for communities in remote areas of the continent.

Case 10 DeepSeek: Accelerating AI Adoption in Africa through Open-Source, Low-Cost Model

DeepSeek is a large AI model developed by Chinese AI company DeepSeek. With its open-source approach and low-cost API access as key competitive advantages, it is rapidly being adopted in the African market. Its pricing is more than 90% lower than that of leading international proprietary models such as GPT, substantially reducing the cost barrier for African SMEs, developers, and research institutions seeking to adopt AI technologies. African entrepreneurs have highlighted both the affordability of Chinese foundation models and their practical functionality, while their open-source nature can significantly reduce development costs for local teams.⁵¹ By the end of 2025, DeepSeek accounted for 11% to 14% of chatbot usage in Africa, with market shares reaching 16% to 20% in countries including Ethiopia and Tunisia. Its relatively permissive open-source licensing allows African developers to download model weights and inference code and independently conduct fine-tuning and application-specific customization. Local teams can also adapt the models using regional datasets to support African languages such as Swahili, Hausa, and Amharic. In practice, Nigerian start-ups have already developed AI solutions based on DeepSeek that can reason and make decisions in African languages, while edtech companies have used Chinese foundation models to develop AI-enabled educational applications. These initiatives suggest that low-cost, open-source AI models can do more than lower the barriers to AI adoption. They can also help cultivate local developer ecosystems and support Africa’s transition from simply consuming imported technologies toward developing and adapting its own AI applications.

The large-scale application of large models depends on adequate computing capacity and digital platforms. In cloud infrastructure and smart city development, Huawei Cloud has established public cloud regions in Johannesburg and Cairo, the latter being its first public cloud node in North Africa, and has undertaken national-

level projects including a dual-active cloud data centre in Cabo Verde and a cloud data centre for the Ministry of Finance of the Democratic Republic of the Congo. These projects provide integrated cloud and AI services to support the digital transformation of public administration and essential services. In 2024, Huawei partnered

⁵¹ Global Times (2025), “Financial and Economic Observation: Chinese Large Models Carry Africa’s AI Entrepreneurship Dreams,” <https://3w.huanqiu.com/a/de583b/4PCHr0zSakx?agt=77>.

with Egypt's Talaat Moustafa Group to advance cloud infrastructure for the smart-city development centred on Noor City. In 2025, Huawei launched its Xinghe AI Network solution in Morocco to upgrade the intelligent capabilities of campus, wide-area, and data centre networks in North Africa. In the same year, it launched Huawei Cloud Stack 8.6 for the sub-Saharan African market.

Digital health is another emerging area of application. In 2019, West China Hospital of Sichuan University established China's first telemedicine consultation platform in Africa at Maputo Central Hospital in Mozambique, supporting remote consultations, distance training, and clinical case discussions. In 2024, Tigermed signed a memorandum of understanding with Purpose Africa to jointly advance China-Africa remote clinical trials and digital-platform development, using cloud infrastructure to facilitate the sharing of healthcare resources and collaboration in clinical research across Africa.

3.4.2 Industry-Specific Smart Solutions: Bringing AI into Practical Local Applications

▪ Smart Agriculture: AI-Powered Crop Identification and Weather Forecasting

In recent years, China-Africa agricultural cooperation has

been shifting from the traditional transfer of agricultural technologies toward smart agriculture. The BeiDou Navigation Satellite System and related technologies and products have been deployed in a growing number of African countries, emerging as a new driver of China-Africa agricultural cooperation. China has established smart agriculture demonstration centres in countries such as Mozambique and Senegal, training more than 2,000 local agricultural technicians in skills including drone operation and data analysis. China-Africa agricultural cooperation projects have also widely deployed agricultural drones for field surveying and mapping, rice seeding, herbicide spraying, and other crop-protection operations. In Zambia, XAG drones use 3D surveying and AI-powered navigation for precision spraying, resulting in wheat yields nearly 7% higher than those achieved through conventional tractor-based spraying. In Mozambique, Mozambique Wanbao Agricultural Park has extensively deployed plant protection drones equipped with BeiDou navigation technology for field surveying and mapping, rice seeding, pesticide spraying, and other field operations, covering a cumulative operational area of 90,000 mu. This "BeiDou + drone" precision agriculture model is helping improve both the efficiency and productivity of local agricultural production.

Case 11 Huawei: A “Smart Agriculture” Platform Supporting the Digital Transformation of Agriculture in Côte d'Ivoire

Agriculture accounts for approximately 15% of Côte d'Ivoire's Gross Domestic Product (GDP) and employs around 46% of its workforce. Digitalisation is regarded as an important tool for raising productivity, strengthening climate resilience, and boosting market competitiveness. Huawei launched its “Smart Agriculture” digital platform at the International Exhibition of Agriculture and Animal Resources (SARA) in 2023 and held discussions with Côte d'Ivoire's Ministry of Agriculture, Rural Development and Food Production in May 2026 to expand the deployment of the platform. The platform uses digital technologies to map farmland plots and monitor crop growth, while providing farmers with real-time information on weather conditions, agricultural inputs, and yields. It also supports traceability at the point of production for export crops such as cocoa and cashews. The platform is particularly important for Côte d'Ivoire, the world's largest producer of cocoa and cashew nuts, as its agricultural sector is facing new EU environmental compliance requirements. Bruno Nabagné Koné, Minister of Agriculture, Rural Development and Food Production of Côte d'Ivoire, described the initiative as “a strategic lever for accelerating the modernization of Côte d'Ivoire's agriculture”.

• Smart Logistics: AI-Enabled Adaptation and Localization of Logistics Networks

High logistics costs and low efficiency remain key obstacles to trade and economic integration in Africa. Infrastructure constraints, complex cross-border procedures, and lengthy customs-clearance processes mean that logistics costs can account for as much as 60% of the final price of goods in some African markets, compared with only 6–8% in developed economies. In response, Chinese companies are moving beyond infrastructure construction alone and deploying integrated digital and

intelligent technologies across a range of smart logistics applications in Africa, including smart warehousing, drone delivery, air cargo hubs, and digital trade and digitally enabled commercial and logistics parks. In Kenya, Kilimall has established smart overseas warehouses, enabling highly accurate inventory management and same-day fulfilment. Ezhou Huahu Airport has partnered with Ethiopian Airlines to develop a China-Africa digital aviation hub connecting China and Africa. A trade and logistics hub in Tanzania financed by investment from China is also using digital customs clearance and e-commerce integration to improve the efficiency of regional trade.

Case 12 Westwell: Smart New Energy Terminal Trucks Supporting the Green and Intelligent Transformation of Egyptian Ports

Westwell is a Shanghai-headquartered artificial intelligence company. Under its Qomolo brand, the company has independently developed the Q-Truck, a fully autonomous battery-electric heavy-duty truck with no conventional cab, as well as the E-Truck, an intelligent connected new energy heavy-duty truck designed to evolve from Level 2 to Level 4 autonomous driving. Both are designed primarily for green and intelligent horizontal transport in port environments. In December 2025, the Red Sea Container Terminals (RSCT) at Sokhna Port, located at the southern entrance to the Suez Canal, began trial operations, with Westwell's E-Truck handling the first container operation at the newly opened terminal. When the terminal officially commenced operations in January 2026, 40 E-Trucks arrived on site and entered service as the terminal's first fleet of smart equipment, participating throughout the port's cargo handling and transport operations. Powered entirely by electricity, each Westwell terminal truck can reduce carbon dioxide emissions by approximately 50 tonnes per year. Together with the terminal's ship-to-shore cranes, automated rail-mounted gantry cranes, and other equipment, the fleet is helping the Red Sea logistics hub move toward greener, lower-carbon operations while also supporting local employment and technical skills training.

Beyond overland transport and port operations, low-altitude aviation is emerging as a new complementary component to Africa's logistics infrastructure. Drone-based transport can provide supplementary delivery capacity in areas where road access is limited, although most such applications remain at the pilot stage. During the Aviation Africa Summit and Exhibition 2025, China's first crewless electric vertical take-off and landing (eVTOL) aircraft to receive the three airworthiness certificates issued by the Civil Aviation Administration of China completed its first demonstration flight in Africa, in

Rwanda. Chinese companies including XAG and DJI have already deployed drone technologies in Ghana, Kenya, South Africa, Zambia, Malawi, and other African countries for applications such as crop protection, agricultural-input delivery, public-health disinfection, mining exploration, and disaster response. These companies have also provided technical training to help develop local expertise in drone operation and maintenance. EHang and other Chinese companies are likewise exploring potential applications for drone-based logistics in African markets.



04

Long-Term Commitment and Model Innovation: Sustainable Practices of Chinese Companies in Africa

This chapter focuses on three representative models of Chinese investment in Africa: employment-oriented, value-add and empowerment-oriented, and sustainability-oriented investment. Following the analytical framework of investment model, followed by case study, then African

response, it examines how Chinese companies are shifting from a short-term project-based approach toward a long-term commitment to establishing a sustained local presence in Africa.

4.1 Employment-Oriented Investment: Job Creation and Skills Spillovers through Localized Operations

4.1.1 Model Analysis: How Localized Industrial Park Operations Create Employment

Chinese investment in industrial parks across Africa is increasingly characterized by a strong employment orientation. The large-scale local employment generated by these projects is well aligned with Africa's demographic structure and labour-market needs. Africa has the world's youngest population, with tens of millions of people entering the labour force each year. Yet the growth of formal-sector employment opportunities has lagged behind the expansion of the working-age population, resulting in a persistent and substantial youth employment gap. Against this backdrop, foreign-funded projects capable of creating large numbers of local jobs

have become a priority for governments seeking to attract investment. At the same time, African governments are raising their requirements for foreign investors, with technical training and local skills transfer increasingly incorporated as mandatory requirements for investment approval and access to policy incentives. The policy priority placed on employment creation and local skills development therefore aligns closely with the evolution of Chinese companies from simply hiring local workers toward systematically developing local employees.

Chinese companies operating industrial parks in Africa have established a comprehensive employment ecosystem encompassing local recruitment, skills training, localisation of management, and localisation of suppliers. This localization process typically proceeds in

stages: companies first recruit and train local workers for frontline production positions, then gradually expand the participation of local employees in middle and junior-level management. As production and management become increasingly localized, stable local procurement demand encourages supporting SMEs to cluster around the industrial parks, further localising the surrounding supply chain.

This layered and progressive model can generate significant employment multiplier effects: for every direct job created by a core enterprise, several additional jobs

may be generated across upstream and downstream industries and related service sectors. Such effects are particularly significant in African countries where industrial ecosystems remain relatively underdeveloped. In recent years, a number of national-level overseas economic and trade cooperation zones established and operated by Chinese companies have been putting this employment-oriented model into practice.

4.1.2 Case Analysis: Direct and Indirect Job Creation through China-Africa Industrial Park Development

Case 13 Ogun-Guangdong Free Trade Zone: Supporting Local Employment and Industrial Talent Development in Nigeria

The Nigeria-Guangdong Economic and Trade Cooperation Zone, also known as the Ogun-Guangdong Free Trade Zone, is operated by Guangdong New South Group. It was one of the first national-level overseas economic and trade cooperation zones established by China in Africa and is among the largest free trade zones in Nigeria and West Africa. Located in Igbesa, Ogun State, the zone is close to Lagos, Nigeria's economic hub, and approximately 55 kilometres from Apapa Port, one of the busiest ports in West Africa. Its strategic location has helped address the area's previous lack of large-scale industrial parks and supporting industrial infrastructure. The cooperation zone was approved in 2008 and began operations in 2009. Guangdong New South Group took over its management in 2013, with its subsidiary China-Africa Investment Limited holding an 82% stake and assuming overall management. In 2016, China-Africa Investment Free Zone Company (China-Africa Investment FZC) became the new management team.

The zone has a planned area of 100 square kilometres and a 99-year land-use term. It focuses on industries including light manufacturing, furniture, building materials, hardware, wood processing, and pharmaceuticals. Drawing on the development experience of Guangdong during China's reform and opening-up, the zone has also implemented a "vocational education and industry going global" strategy, using industry-education integration to address local skills shortages. By the end of 2025, more than 170 enterprises had established operations in the zone, including Goodwill Ceramic, China Glass Holdings, Huarui Industry FZE, and Hewang Packaging, spanning ceramics, glass, building materials, and paper products. Cumulative investment exceeded USD 2 billion, with annual import and export trade valued at approximately USD 1 billion. The zone employs almost 10,000 local workers and has stimulated the expansion of logistics, packaging, commercial, and other service industries. An agency under the Office of the President of Nigeria described the cooperation zone as a "truly successful free trade zone" and indicated plans to promote it as a national model in support of Nigeria's reindustrialisation objectives.

Case 14 Eastern Industry Zone: Driving Local Employment and Skills Upgrading in Ethiopia

The Eastern Industry Zone in Ethiopia was established with investment from Jiangsu Yongyuan Investment Co., Ltd. It was the first national-level overseas economic and trade cooperation zone established by a Chinese company in Ethiopia and also Ethiopia's first industrial park. The Ethiopian government incorporated the Eastern Industry Zone into its Sustainable Development and Poverty Reduction Programme and designated it as a priority project under the national industrial development strategy. Drawing on the Eastern Industry Zone as a model, the government subsequently formulated the Industrial Parks Proclamation. By developing infrastructure, attracting investment, and supporting production and operations, the park combines Chinese experience in industrial park development with Ethiopia's local labour force, raw materials, and market conditions. By early 2026, more than 100 enterprises had established a presence in the zone, including Huajia Aluminum Industry PLC, Eastern Steel, Yangfan Motors, and Lida (Ethiopia) Textile PLC, covering industries including building materials, steel, vehicle assembly, metal processing, and textiles.

The zone has created approximately 23,000 local jobs for local residents and contributed to import substitution and increased foreign-exchange earnings in Ethiopia. The zone also provides training for local technical personnel and management staff. In addition, enterprises within the zone have stimulated the development of local agents, procurement businesses, and supporting services. Some Ethiopian entrepreneurs have travelled to China for training and procurement, and have subsequently partnered with Chinese companies to establish manufacturing facilities in Ethiopia. The Eastern Industry Zone has thus created an employment and skills-development pathway extending from basic employment and skills transfer to management advancement and local entrepreneurship. This provides practical experience for Ethiopia in developing an industrial workforce, strengthening manufacturing capabilities, and advancing industrialisation.

Case 15 China–Egypt TEDA Suez Economic and Trade Cooperation Zone: Expanding Local Employment and Developing Technical Talent in Egypt

The China–Egypt TEDA Suez Economic and Trade Cooperation Zone was jointly developed and operated by Tianjin TEDA Investment Holding Co., Ltd., and the China-Africa Development Fund. Located at Ain Sokhna Port in Suez Governorate, it is one of China's national-level overseas economic and trade cooperation zones in Egypt. The area surrounding the zone had previously consisted largely of undeveloped desert, with limited industrial infrastructure and significant pressure on youth employment.

To address the challenges of industrialization, the zone has adopted a dual-track model centred on services and ecosystem development. First, it has established a one-stop integrated service platform covering the entire process from company registration and customs clearance to production, thereby lowering the costs faced by companies establishing operations overseas.

Second, it has developed an industrial cluster model combining bonded warehousing and logistics together with eight major manufacturing sectors, including advanced building materials, oil and gas equipment, machinery manufacturing, and new energy.

Third, the zone has promoted extensive localization of operations, with local employees accounting for more than 95% of the workforce, while systematically training and developing technical specialists and management personnel.

Fourth, it has leveraged digital technologies through the “one cloud, one network, one platform” initiative, comprising a resident cloud service, a fibre-optic communications network across the park, and a digital empowerment platform.

By the end of 2025, the China–Egypt TEDA Suez Economic and Trade Cooperation Zone had attracted more than 200 enterprises, with actual investment reaching USD 3.8 billion and cumulative sales exceeding USD 6.6 billion. It had directly created more than 10,000 local jobs and paid a cumulative USD 310 million in taxes and fees. Egyptian Prime Minister Mostafa Madbouly has visited the cooperation zone nine times, describing it as “an ideal model for the development of industrial parks in Egypt”.

4.1.3 Feedback from African Stakeholders

The cooperation zones discussed above represent a microcosm of China’s employment-oriented investment in Africa. Chinese investment has already generated substantial employment opportunities across the continent. According to publicly available statistics, China’s overseas economic and trade cooperation zones in Africa have created more than 400,000 local jobs. As of the end of 2025, the 33 cooperation zones covered by the available statistics had attracted cumulative investment of more than USD 13 billion, generated over USD 55.5 billion in cumulative output, and contributed more than USD 3.5 billion in taxes, while creating 90,000 direct jobs for African workers.⁵²

Once fully completed, the Kwala Industrial Park (also known as the Sino-Tanzania Industrial Park), jointly developed by Group Six International Limited and ARISE Integrated Industrial Platforms (Arise IIP), is expected to create 50,000 direct jobs and 250,000 indirect jobs. The national-level overseas economic and trade cooperation zones in Africa recognized by China’s Ministry of

Commerce currently span countries including Zambia, Nigeria, Egypt, and Ethiopia. With processing and manufacturing, trade and logistics, resource utilisation, and integrated industrial-urban development as their main models, these zones have generated significant employment multiplier effects and received recognition from governments across Africa.

Francois Ango Ndoutoume, Fourth Vice-President of the Pan-African Parliament of the African Union, stated that “China is a reliable partner and creates a large number of jobs for the African people through investment,” adding that “China is gradually becoming one of the most important partners of African countries today, the most important economic and trade partner.” Former Pan-African Parliament President Bouras Djamel noted that China-Africa cooperation is undergoing a transformation, shifting from the former model of “doing trade and selling finished products” toward “make in Africa”. This shift, he observed, is creating substantial employment opportunities for local youth and delivering “win-win” outcomes. Gerd Müller, Director General of the United Nations Industrial Development Organization, has also

⁵² China Business News (2026), ‘China–Africa Cooperation in Numbers’, https://www.comnews.cn/m/content/2026-05/06/content_63711.html?f_link_type=f_linkinlinenote&flow_extra=eyJkb2NfcG9zaXRpb24iOiJAsImRvY19pZCI6IjY1YjUxNjNiZThiY2ZkZDUtZjU3OGUzYzg1ZmM0NDAXOSIsImlubGluZV9kaXNwb-GF5X3Bvc2l0aW9uljowfQ%3D%3D; The Paper (2026), ‘FOCAC Affairs Ambassador Liu Yuxi: Chinese Investment Is Highly Welcomed in Africa, and Zero Tariffs Will Support “Made in Africa”’, https://www.thepaper.cn/newsDetail_forward_33199424.

noted that China's extensive experience in developing industrial parks offers valuable lessons for other developing countries.

Box 7 The Growth of Local Employees in Africa: From Technical Workers to Management

In 2013, Dina Mahmoud Hassan had just graduated from university, at a time when the China–Egypt TEDA Suez Economic and Trade Cooperation Zone was entering a critical stage of early development. She joined Jushi Egypt Fiberglass Co., Ltd., one of the enterprises in the zone, becoming one of its few female employees at the time and starting out as an ordinary production planner. Over the following decade, Dina progressed from a frontline employee to deputy manager of the planning and logistics division, where she is responsible for the company's overall production planning and logistics coordination. She has also received awards for outstanding performance as both an exemplary employee and an outstanding middle-level manager. "From having just one production line to now running four lines in parallel, every step forward has been the result of our team's collective effort and ingenuity," Dina reflected. She has been both a witness and an active contributor to the company's growth. Dina's story is far from unique. At the TEDA Cooperation Zone, many local managers have followed similar paths, rising through the ranks from frontline positions. Rather than simply providing jobs, Chinese companies in Africa are increasingly investing in the skills and capabilities that enable local employees to build sustainable careers. In doing so, they are creating not only integrated industrial value chains but also sustainable talent-development pathways.⁵³

4.2 Value-Added and Empowerment-Oriented Investment: Moving Up the Value Chain from Resource Exports to Advanced Processing

4.2.1 Model Analysis: Adaptive Innovation and Localization in Cross-Border Technology Transfer

The *Forum on China-Africa Cooperation Beijing Action Plan (2025–2027)*, adopted at the 2024 Beijing Summit of the Forum on China-Africa Cooperation (FOCAC), clearly identified China's support for Africa's local value chain development, manufacturing, and downstream

processing of critical minerals in Africa as priority areas for cooperation. Chinese resource-sector investment in Africa is beginning to extend into local processing, embedding processing and manufacturing activities closer to the source of raw materials and creating integrated value chains from resource extraction, through local processing, to value-added exports. This approach seeks to transform Africa's resource endowment into a driver of industrial upgrading.

⁵³ Xinhua (2025), 'Building Dreams on the Shores of the Red Sea', <https://www.news.cn/20250627/5de06e0fa2a840a899bfdb6796b8031a/c.html>.

Technology transfer under the value-added and empowerment-oriented model generally occurs at three progressively deeper levels: The first is physical technology transfer, involving the introduction of mining and metallurgical equipment, machinery, and production lines. The second is process and technical know-how transfer, including production techniques, formulation and process design, and quality-control practices. The third is organizational capability transfer, involving the establishment of modern production-management systems, supply-chain capabilities, and market-operation structures. This model typically requires companies to establish processing capacity near mining areas, together with supporting power and transport infrastructure,

and to negotiate arrangements with host governments concerning taxation, foreign exchange, and local-content requirements. Although such projects generally require substantial upfront investment, once an integrated value chain is established they can generate sustained value creation over the long term. Chinese companies are increasingly drawing on Africa's critical-mineral resources to translate this model into concrete actions spanning extraction, processing, and advanced materials manufacturing.

4.2.2 Case Analysis: Moving Up the Value Chain from Raw-Material Exports to Local Processing

Case 16 Huayou Cobalt: Building an Integrated Lithium Value Chain from Mining to Beneficiation and Processing in Zimbabwe

Zimbabwe is Africa's largest lithium producer, accounting for approximately 10% of global lithium concentrate output in 2025. For many years, much of the country's lithium resources were exported in relatively unprocessed form, leaving Zimbabwe with mainly the economic returns associated with primary mining. To increase domestic value capture from mineral exports, Zimbabwe has progressively tightened restrictions on lithium-ore exports and introduced requirements for local downstream processing. In response to this policy direction, Huayou Cobalt has established an integrated lithium value chain in Zimbabwe spanning mining, beneficiation, and processing.

In April 2022, Huayou Cobalt acquired a 100% stake in the Arcadia lithium project for approximately USD 422 million. The project has estimated lithium carbonate equivalent resources of approximately 2.45 million tonnes, with an average lithium oxide grade of 1.34%. Building on the mine acquisition, the company has established two major processing facilities. The first is the PLZ lithium concentrate plant, which has an annual ore-processing capacity of 4.5 million tonnes and produces approximately 450,000 tonnes of lithium concentrate per year. The second is Huajing Technology Lithium Sulfate Refinery, also known as the ATZ Project, which has an annual production capacity of 50,000 tonnes of lithium sulfate. Together, these two facilities create an integrated production chain extending from the extraction of raw ore to the production of lithium salts.

Zimbabwe's Minister of Mines and Mining Development, Polite Kambamura, described Huayou Cobalt as "leading by example," saying that the project demonstrated the feasibility of the government's vision for local value-add and calling on other lithium producers to follow suit by investing in beneficiation and processing. By integrating mining and downstream processing, the project is helping Zimbabwe move from the export of primary mineral ores toward higher-value lithium products. It therefore has the potential to increase domestic resource revenues, create local employment, and develop technical skills, while aligning with Africa's broader drive to capture greater local value from its natural resources.

Case 17 CMOC Group — Driving Copper and Cobalt Value Chain Upgrading in the Democratic Republic of the Congo through Localized Operations and Green Energy

CMOC Group has maintained a long-term presence in the Democratic Republic of the Congo (DRC), where it has developed an integrated sustainability model built around resources, industry, and communities. In terms of production capacity, the company holds controlling interests in two world-class copper-cobalt mines, TFM and KFM. TFM operates five production lines with annual copper production capacity exceeding 450,000 tonnes, while KFM operates one production line with annual copper production capacity exceeding 150,000 tonnes. Once its Phase II expansion reaches full production, KFM is expected to add an average annual copper production capacity of 100,000 tonnes. In 2025, the two projects produced a combined 741,100 tonnes of copper and 117,500 tonnes of cobalt.

In terms of localization, more than 90% of the company's employees are Congolese. The company has also established the Luban Mozi College, which combines Chinese-language instruction with vocational skills training, as well as a Center for Chinese Language and Professional Skills to support local workforce development.

In terms of energy, in response to power supply constraints, CMOC Group has developed a diversified power-security strategy to support the transition of its mining operations away from diesel generation toward cleaner and more reliable energy sources.

In terms of community development, TFM has invested approximately USD 325 million cumulatively in education, healthcare, infrastructure, and other community-development programmes, while KFM has established a separate five-year Cahier des Charges worth USD 8 million.

Supported by its integrated local industrial footprint, CMOC secured the largest share (approximately 40%) of the DRC's cobalt export quota in 2025, reinforcing its position in the global cobalt supply chain. TFM has also become the first mine in Africa to receive a "fully satisfactory" rating across all assessment areas under The Copper Mark framework. During a visit to TFM, the DRC Minister of Mines described the mine as "an outstanding example of a mining enterprise in generating fiscal revenues for the country and delivering development benefits to local communities".

Case 18 CNGR Advanced Material: Establishing Africa's First Power Battery Materials Production Base in Morocco

In June 2025, COBCO, a joint venture between Chinese lithium battery materials producer CNGR Advanced Material, and Moroccan investment fund Al Mada, commenced production in Jorf Lasfar. It was the first project in Africa involving an operating investment by a Chinese new energy battery value chain company, and the first new energy materials production base of its kind to commence operations in Africa. With a total investment of approximately USD 2 billion and a controlling stake held by the Chinese partner, Phase I has an annual production capacity of 40,000 tonnes of nickel-based precursor materials. The full project is planned to reach annual production of 120,000 tonnes of ternary precursors and 60,000 tonnes of lithium iron phosphate (LFP) cathode materials, together with spent-battery recycling capabilities. At full capacity, the facility is expected to supply battery materials sufficient for nearly one million electric vehicles.

The plant processes Morocco's abundant phosphate and cobalt resources locally and plans to transition entirely to locally generated green electricity by the end of 2026. Over the longer term, the project is expected to create approximately 1,800 direct technical jobs, alongside additional indirect employment opportunities.

By leveraging Morocco's strengths in mineral resources, green energy, and its network of free trade agreements, the project is helping extend the country's industrial chain beyond vehicle assembly into battery-material manufacturing and battery recycling. It is also working with local universities and technical institutions to train industry professionals and develop a domestic talent pipeline for Morocco's battery industry.

The facility has adopted a range of resource-efficient and low-carbon production practices, including seawater desalination and industrial water recycling, while progressively increasing its use of renewable energy. These measures provide critical support for Morocco's efforts to develop a new energy industrial value chain serving European and other Western markets. The United Nations Conference on Trade and Development has listed the project as one of the largest announced investments in Africa's clean energy sector and highlighted Morocco's emergence as a new manufacturing platform for the global electric-mobility value chain.

4.2.3 Feedback from African Stakeholders

The growing prominence of value-added and empowerment-oriented investment in China-Africa industrial cooperation ultimately reflects its alignment with Africa's long-standing development priorities and aspirations for greater economic autonomy. The African Union's Africa Mining Vision 2030 advocates local processing of mineral resources, extending industrial chains, and increasing the value-add of resources. The African Development Bank (AfDB) has likewise placed value-added processing at the core of its "Industrialize Africa" strategy. Former AfDB President Akinwumi Adesina has repeatedly emphasized that "The export of raw materials is the door to poverty. The export of value-added products is the highway to wealth, and we're tired of being at the bottom of the value chain."

Chinese investment approaches that embed processing and manufacturing activities closer to the source of resources are aligned with this agenda. Companies including Huayou Cobalt, CMOC Group, Sinomine Resource Group, and Zijin Mining have built vertically

integrated supply chain systems covering extraction, smelting, and processing at key locations such as Zimbabwe's lithium mines and the copper-cobalt belt of the Democratic Republic of the Congo.

Companies including Weihai International Economic & Technical Cooperative Co., Ltd., Hunan Modern Agriculture International Development Co. Ltd., and Yuan Longping High-Tech Agriculture Co., Ltd. have established full industrial chain in countries including the Republic of the Congo, Rwanda, and Madagascar, covering the cultivation, harvesting, processing, and marketing of crops such as cassava, chili peppers, and rice.

Companies including Hunan Jianglai Food Co., Ltd. and China Light Industry Nanning Design Engineering Co., Ltd. have supported the local processing of agricultural products such as macadamia nuts and cocoa in Kenya and Côte d'Ivoire.

These initiatives are helping shift African agricultural exports from a model based on "selling raw materials" toward one based on "selling processed products,"

thereby converting resource endowments into tangible domestic industrial capabilities.

Ahunna Eziakonwa, Assistant Secretary-General of the United Nations and Director of the Regional Bureau for Africa of the United Nations Development Programme, has also noted that Chinese investment in Africa is accelerating its expansion into manufacturing and other diversified sectors, providing important support for the

production of higher-value goods and the development of industrial chains. These remarks indicate that local value-added processing is one of the key areas of focus for African multilateral institutions. Chinese investment in this area also intersects with the industrialization objectives of the African Union's Agenda 2063, helping shift China-Africa cooperation from traditional trade toward a development partnership based on joint capacity building and industrial collaboration.

Box 8 Views from African Stakeholders

"The commissioning of Phase I of the New Tonkolili beneficiation plant, with an annual processing capacity of 30 million tonnes and constructed by China Railway First Group, is of positive and far-reaching significance to Sierra Leone's overall national development. Exports of higher-value-added concentrates will improve the country's trade structure while driving the development of supporting industries such as power and logistics, thereby creating a large number of local jobs and improving people's livelihoods."

— Julius Maada Bio, President of Sierra Leone

"The arrival of Chinese rubber companies has driven the overall upgrading of Côte d'Ivoire's rubber processing industry, increasing the added value of agricultural products while also creating a large number of jobs. Côte d'Ivoire welcomes investment from Chinese enterprises to support the transformation of its agriculture from raw material exports to primary processing."

— Kobenan Kouassi Adjoumani, Minister of State, Minister for Agriculture, Rural Development and Food Production of the Republic of Côte d'Ivoire

"China's investments in Zimbabwe's mining, beneficiation and energy sectors show that strategically pursuing integrated mining-energy investments in resource-rich but energy-constrained African countries can contribute to increasing domestic value addition."

— South African Institute of International Affairs (SAIIA), an independent public policy think tank in South Africa⁵⁴

54 SAIIA (2026). Examining Integrated Chinese Mining-Energy Investments in Zimbabwe. <https://saiia.org.za/research/examining-integrated-chinese-mining-energy-investments-in-zimbabwe/>

4.3 Sustainability-Oriented Model: Green Infrastructure Development and Community Benefit-Sharing

4.3.1 Model Analysis: EPC + Operations and Maintenance and Community Benefit-Sharing through Low-Carbon Infrastructure

The *Beijing Action Plan (2025–2027)*, adopted at the 2024 Beijing Summit of FOCAC, identified support for Africa's green development and energy transition as a priority area for cooperation. At the same time, the growing wave of localization legislation in African countries and increasing demands for community participation and benefit sharing across African countries are placing higher expectations on foreign investors to establish mutually beneficial relationships with host communities. Against this backdrop, Chinese companies are increasing their focus on sustainability-oriented investment models across Africa.

This model integrates green standards and community benefit-sharing mechanisms throughout the project lifecycle, enabling investment projects to generate environmental and social benefits alongside economic returns. This represents a shift away from a narrow focus

on commercial returns toward the creation of economic, environmental, and social value. The evolution of this model is closely linked to the changes in the way Chinese companies develop infrastructure in Africa.

In the earlier stages, Chinese enterprises in Africa primarily adopted EPC contracting (Engineering, Procurement and Construction). Once a project was completed and handed over, operations were generally assumed by the owner, with the Chinese contractor's involvement effectively ending at project delivery. In recent years, however, an increasing number of Chinese enterprises have adopted an integrated investment–construction–operation model, extending their involvement from projects lasting several years to arrangements spanning several decades. This shift provides stronger incentives for Chinese companies to focus on the long-term sustainability of their projects, including environmental performance and relationships with local communities.

4.3.2 Case Analysis: Community Engagement and Cultural Integration in Renewable Energy and Solar Power Projects

Case 19 China-Zambia Belt and Road Joint Laboratory on Green and Safe Development of Mineral Resource

In 2025, the China-Zambia Belt and Road Joint Laboratory on Green and Safe Development of Mineral Resources was launched. The laboratory was jointly established by the University of Science and Technology Beijing, the University of Zambia, China Nonferrous Metal Mining Group, Tongling Nonferrous Metals Group, and JCHX Mining Management Co. It supports the Partnership Action for Green Development under the Ten Partnership Actions of FOCAC, and promotes practical China–Africa cooperation in the mining sector through scientific and technological innovation.

China Nonferrous Metal Mining Group has applied a series of research outcomes from the University of Science and Technology Beijing in its mining operations, responding to the needs of African resource-rich countries to improve mineral recovery efficiency and increase the value added of their natural resources. At Chambishi Copper Mine, China's first overseas intelligent paste backfill system has been built, with an annual backfilling capacity of up to 1.5 million cubic meters. The mine's resource recovery rate has increased from 50% to 83%. The system has also achieved reductions in tailings and solid waste, closed-loop recycling of mine wastewater, and the recovery of previously difficult-to-extract ore bodies. It also led to the development of the first digitalized mine in Africa. Following extensive practical application and validation, this mature model of green mining technology has gradually been replicated and promoted. The project has received multiple first prizes in industry science and technology awards and has jointly trained more than 50 Chinese and African postgraduate students in mining-related fields, and continued to transfer practical mining technologies. These efforts support the efficient and low-carbon development of local mineral resources and help increase value across the mineral resources industry chain.

Case 20 China Gezhouba Group: Angola's Caculo Cabaça Hydropower Station, Lighting Up the "Three Gorges of Africa"

In June 2015, China Gezhouba Group of Energy China undertook the Caculo Cabaça Hydropower Project in Angola under an EPC O&M (operation and maintenance) model. With a contract value of US\$4.53 billion, it was the largest hydropower project undertaken by a Chinese company in Angola and has been described as the "Three Gorges Project of Africa". The project has a total installed capacity of 2,172 MW and is expected to generate approximately 8,566 GWh of electricity annually. It can meet more than 50% of Angola's electricity demand, reduce greenhouse gas emissions by approximately 7.2 million tonnes per annum, reduce the consumption of non-renewable oil and coal resources by 2.7 million tonnes, and significantly improve conditions for water resource utilization. During construction, the project conducted more than 200 vocational training programmes involving over 5,000 participants and created more than 3,000 jobs, with employment peaking at over 6,000 positions. A large number of Angolan employees subsequently developed into key local technical specialists in hydropower operations and maintenance. Under the contract, Gezhouba Group will provide four years of operations and maintenance services and technical training after completion, ensuring a smooth transition from construction to operation and facilitating the effective transfer of technical standards and operating systems to local personnel. The project team has also participated in public welfare activities such as rural community development and education and training, demonstrating its commitment to corporate social responsibility. These efforts have earned broad recognition from the Angolan government and local communities. João Borges, Angola's Minister of Energy and Water, called the project "crucial" to the economic construction of Angola and said that "It will solve the power shortage in Angola and bring jobs to the country."

Case 21 POWERCHINA: Ethiopia's Adama Wind Farm Breaking Through Beyond Hydropower

The Adama Wind Farm project was jointly undertaken by a consortium of Hydrochina International Engineering Co., Ltd., a subsidiary of POWERCHINA, and CGCOC Group. The project was developed in two phases, with a total installed capacity of 204 MW and 136 wind turbines. Phase I, with an installed capacity of 51 MW, was completed in December 2012, while Phase II, with an installed capacity of 153 MW, was completed in May 2015 and commissioned in June 2016. The project was designed and constructed in accordance with Chinese standards, with wind turbines supplied by SANY Renewable Energy and other companies. Planning and design, construction, equipment supply, and operations training were coordinated within an integrated technical system, enabling technical standards and maintenance procedures to be systematically transferred to the Ethiopian Electric Power team.

The project was Ethiopia's first modern wind farm to enter commercial operation and, upon completion, was the largest wind power project in sub-Saharan Africa. It helped diversify Ethiopia's historically hydropower-dominated electricity mix and alleviate power shortages caused by declining hydropower generation during the dry season. It was also a landmark project under Ethiopia's Growth and Transformation Plan.

Over several years, the Chinese side trained more than 100 Ethiopian power-sector technicians. The wind farm is now independently operated and maintained by a local team and has contributed to approximately 1,200 jobs. In addition, Phase II of the Adama Wind Farm project is estimated to save approximately 139,800 tonnes of standard coal consumption and reduce carbon dioxide emissions by approximately 348,300 tonnes per annum. It was selected as a "Best Practice Case for Green Development in International Energy Cooperation". As a successful cooperation project between the Chinese and Ethiopian governments in environmental protection, it offers valuable experience for subsequent Chinese investment in Africa's renewable-energy sector.

Case 22 CGN: South Africa's TFC Solar PV Project, Addressing Power Shortages through an Integrated Mining-Energy Model

Faced with South Africa's electricity shortages and the high cost and unreliable supply of power faced by mining companies, China General Nuclear Power Corporation (CGN), together with the China-Africa Development Fund and South African investor KONA Holdings Limited, invested in and developed the TFC solar PV project in Limpopo Province. The project supplies electricity directly to the TFC ferrochrome smelter operated by Samancor Chrome, a subsidiary of Sinosteel Corporation, creating an integrated mining-energy model.

The project was the first energy project developed and financed by China in South Africa following the 2024 Beijing Summit of FOCAC. It was also the first privately financed, privately owned power-generation project under a private power-purchase agreement (PPA) involving a Chinese company in South Africa. It has a total installed capacity of 100 MW, including 60 MW in Phase I. Once completed, it is expected to generate 147 million kWh of clean electricity annually, equivalent to reducing 200,000 tonnes of carbon dioxide emissions. The project supplies dedicated clean electricity to the smelter under a long-term power purchase agreement, reducing the plant's dependence on South Africa's national grid and mitigating the risks associated with load shedding.

Wu Peng, Chinese Ambassador to South Africa, described the TFC Solar Project as a landmark project involving Chinese mining and energy companies and an important attempt to address the long-term development challenges facing resource projects. By securing a stable electricity supply for Samancor Chrome, the project addresses a fundamental constraint on the long-term development of mining operations, while providing a practical example for energy transition and sustainable development in South Africa and other resource-dependent African economies.

4.3.3 Feedback from African Stakeholders

The integrated investment–construction–operations model adopted by Chinese companies in hydropower, wind power, and solar energy responds to Africa's dual priorities of energy transition and better quality of life. During project development, supporting infrastructure such as water supply, electricity, and road networks is developed alongside the core project, while investment in education, healthcare, and other public services can also benefit surrounding communities. During the operational stage, energy-efficient production and green electricity solutions help reduce carbon emissions while maintaining commercial viability and aligning projects with host countries' energy-transition and climate objectives. This approach has been welcomed by host governments and international organizations. In November 2025,

construction began on a 480,000-tonne-per-year green fertiliser project and associated geothermal power plant in Kenya, developed under an integrated investment–construction–operations model by Chinese companies. At the groundbreaking ceremony, Kenyan President William Ruto stated that investment in renewable energy is efficient, reliable, and sustainable. He noted that the project would contribute to Kenya's food-security goals, help to reduce the country's substantial foreign-exchange expenditure on fertiliser imports, and strengthen Kenya's position as a leader in green growth and climate-smart innovation in Africa. Gerd Müller, Director General of the United Nations Industrial Development Organization, has also noted that China's leading position in fields such as solar and battery technologies provides countries in Africa, Asia, and Latin America with more accessible, low-cost sustainable solutions for their green transition.

Conclusion and Outlook

The year 2026 marks the 70th anniversary of the beginning of diplomatic relations between China and the countries of Africa. It is also a critical year in the implementation of the Forum on China-Africa Cooperation Beijing Action Plan (2025–2027), as China-Africa cooperation moves from broad-based rollout toward deeper and more substantive implementation. Over the past 70 years, China-Africa relations have prospered despite changes in the international landscape, and gradually developed a form of cooperation characterized by deeper mutual trust, closer economic and trade ties, greater alignment of development agendas, and expanding people-to-people exchanges. Since the establishment of the FOCAC, practical cooperation in infrastructure, industrial investment, trade facilitation, agriculture, healthcare, and human resource development has provided important support for Africa's economic and social development and laid long-term foundations for Chinese enterprises to participate in Africa's modernization process.

This report finds that Chinese investment in Africa is undergoing three major structural shifts:

- The scope of cooperation is expanding from traditional infrastructure, resource development, and engineering contracting into green, digital, and smart industries
- The model of cooperation is shifting from product exports and project delivery toward a combination of investment, construction, operation, technology transfer,

and the development of local suppliers

- The objectives of cooperation are gradually moving beyond scale expansion toward job creation, greater local added value, stronger African development capacity, and more sustainable long-term partnerships.

At the same time, uncertainties surrounding global economic growth, debt, foreign-exchange pressures, climate change, technological gaps, and supply chain restructuring are becoming increasingly intertwined. African countries also differ substantially in terms of market size, industrial capacity, institutional structures, governance capabilities, infrastructure, and access to finance.

Looking toward 2027 and beyond, China-Africa investment cooperation cannot rely on a single model or short-term expansion. It needs to place greater emphasis on country-specific conditions, commercial sustainability, social inclusion, and risk governance, while turning market access into industrial development, technology cooperation into local capabilities, and individual projects into long-term trust.

Looking forward, the first goal is to maximize the benefits of zero-tariff access and move from market opening toward stronger trade and productive capacity. From 1 May, 2026, China expanded its existing zero-tariff treatment in Africa for 100% of tariff lines from 33 least-developed countries (LDCs) to an additional 20 African

non-LDCs with which China has diplomatic relations, bringing all 53 African countries with which China has diplomatic relations under the zero-tariff arrangement.⁵⁵ This creates new institutional conditions enabling African countries to expand exports to China, diversify their trade, and attract productive investment.

However, zero tariffs do not automatically translate into effective market access. Product eligibility, sanitary and phytosanitary requirements, technical standards, certification, reliable supply, warehousing and cold-chain logistics, cross-border settlement, and market channels will all affect the extent to which African producers can benefit from the policy.

This report therefore recommends making greater use of the economic and trade cooperation mechanisms under FOCAC, existing dialogue channels between China and the Secretariat of the African Continental Free Trade Area (AfCFTA), and pilot zones for in-depth China-Africa economic and trade cooperation. Chinese and African trade, customs, and standards authorities, working together with industry associations, should develop country and product-specific implementation guidance, strengthen outreach and verification concerning rules of origin, facilitate market access for agricultural and food products, conduct standards comparisons, and strengthen testing, certification, and conformity-assessment capacity.

Greater coordination should also be pursued between China's zero-tariff arrangements and regional African trade rules. African countries, for their part, can strengthen quality infrastructure, export-support services, and processing policies around products in which they have comparative advantages. This will help farmers,

cooperatives, small and medium-sized enterprises, processors, and exporters to establish more stable supply relationships, while encouraging greater local grading, processing, packaging, and brand development. Chinese companies, financial institutions, logistics providers, and e-commerce platforms can expand long-term purchasing arrangements and joint processing ventures, while providing trade finance, export credit insurance, foreign-exchange risk management, overseas warehousing, and cold-chain services.

Trade fairs should be complemented by regular procurement and distribution arrangements, turning promotional opportunities into sustained commercial channels. The effectiveness of the policy should be assessed not only by aggregate trade volumes but also by indicators such as the number of enterprises actually benefiting from tariff preferences, newly approved product categories, the share of processed exports, SME participation, repeat orders, and employment generated. This will help prevent the benefits of tariff liberalisation from becoming overly concentrated in a small number of commodities, countries, or large enterprises.

The second goal is to strengthen new drivers of investment and accelerate the shift from technology application to stronger production and innovation capabilities. Green industries, e-commerce and digital payments, technology, and artificial intelligence are emerging as new growth areas for China-Africa investment cooperation. These sectors build on China's industrial and technological strengths and respond to Africa's pressing need to expand energy supply, advance industrialization, bridge the digital divide, increase agricultural productivity, and reduce logistics costs.

⁵⁵ The Announcement of the Customs Tariff Commission of the State Council on Implementing Zero-Tariff Measures for African Countries Having Diplomatic Relations with China (Customs Tariff Commission Announcement No. 5 of 2026) stipulates that the zero-tariff measures for 20 additional non-LDC African countries having diplomatic relations with China will be implemented from 1 May 2026 to 30 April 2028. Together with the previous arrangement covering 33 African least developed countries, the measures cover a total of 53 African countries having diplomatic relations with China. See the Ministry of Finance announcement and the policy report on the website of the State Council of the People's Republic of China.

The Forum on China-Africa Cooperation Beijing Action Plan (2025–2027) has already identified local value-chain development, manufacturing, downstream processing of critical minerals, digital transformation, and green development as priority areas for cooperation. To prevent these “new growth drivers” from remaining limited to equipment exports or isolated projects, this report recommends that industrial authorities in China and Africa, Regional Economic Communities (RECs), and financial institutions jointly identify priority projects by country and sector through existing partnership initiatives in areas such as industrial value chains and green development. Countries with relatively developed manufacturing bases could take on regional manufacturing and R&D functions; resource-rich economies could prioritize local processing and domestic supplier networks; agricultural economies could focus on agricultural technology, storage, logistics, and higher-value processing; smaller and more vulnerable economies could begin with clearly defined needs such as distributed renewable energy, small-scale processing, and digital public services.

Project design should also adopt a systems-based approach. Green cooperation should coordinate energy supply, grid and energy storage, local manufacturing, and long-term operation and maintenance. Digital cooperation should advance infrastructure, regulatory alignment, data security, and digital skills in parallel. Cooperation in smart agriculture, healthcare, and logistics should prioritize solutions that are appropriate, maintainable, and replicable.

Chinese enterprises can work with local African enterprises and suppliers to develop regional value chains through long-term procurement, quality guidance, technical training, and joint R&D, while promoting the upgrading of economic and trade cooperation zones into industrial ecosystems integrating production, R&D, training, logistics, and financial services.

Policy-oriented, development-finance, and commercial financial institutions should strengthen support for feasibility studies, blended and joint financing, insurance, and phased investment. Projects involving public funds and major infrastructure should also undergo systematic assessments of fiscal sustainability, environmental and social impacts, performance, and exit arrangements. Projects under these new growth areas should be evaluated primarily in terms of technology transfer, supplier development, long-term operation and maintenance, service affordability, and environmental benefits.

The third goal is to pursue a long-term approach to cooperation and move from project implementation toward local value creation and sustainable development. long-term approach is not simply about extending investment horizons or increasing capital commitments. It also requires companies to align their business operations with the host country's industrialisation, employment, value-added processing, public services, and community development. Research on regional value chains and international development-finance standards shows that local value-add, labour rights, stakeholder engagement, environmental governance, and grievance mechanisms are important foundations for cross-border projects to maintain social acceptance and ensure the long-term viability of cross-border projects.⁵⁶

This report recommends establishing a long-term cooperation mechanism that links corporate responsibility, institutional safeguards in host countries, and public support services on the Chinese side. Chinese companies should incorporate localisation and sustainability requirements into investment decisions, project budgets, and operational performance assessments. Before investment, they should conduct country, market, compliance, environmental, and social due diligence. During construction, they should expand local recruitment and procurement while providing job-specific training.

⁵⁶ See the United Nations Economic Commission for Africa (UNECA), *The AfCFTA as a Catalyst for Industrial Development*; and the International Finance Corporation (IFC), *Performance Standards on Environmental and Social Sustainability*.

During operations, they should progressively increase the localisation of technical and managerial positions and develop local suppliers and maintenance services. At the point of project handover or exit, responsibilities concerning personnel, assets, environmental remediation, and communities should be clearly defined. Corporate social responsibility should likewise move beyond one-off donations toward sustained benefit-sharing mechanisms.

African governments should improve the continuity and transparency of policies on investment, taxation, foreign exchange, land, labour, and the environment, improve cross-departmental investment services, and establish clear rules, reasonable transition periods, and effective dispute-resolution channels for requirements concerning local content, technology transfer, and downstream resource processing. The Chinese government, diplomatic missions, financial and insurance institutions, business associations, and professional service providers can make greater use of investment and economic cooperation working groups, Chinese commercial offices abroad, and existing investment-protection arrangements, in order to strengthen country-specific information services, compliance training, legal and accounting support, risk monitoring, insurance coverage, and emergency coordination. They should also encourage multilateral institutions to participate in cross-border infrastructure, public health, and climate-adaptation projects.

This report also recommends establishing a long-term project evaluation and disclosure framework subject to appropriate protection of commercial confidentiality, with a focus on local procurement, employment of youth and women, skills training, management localization, supplier development, environmental performance, community investment, and grievance handling.

During 2026–2027, priority could be given to developing country-specific operational guidelines, project-level localisation commitments, and risk-response

mechanisms. This would help to ensure that commercial returns are built on local development, social acceptance, and institutional trust.

Zero-tariff access opens up market opportunities, new growth drivers expand the boundaries of industrial cooperation, and a long-term approach provides the stability needed to navigate economic cycles. Together, these three pillars can help move China–Africa cooperation beyond a collection of individual projects toward an interconnected partnership for modernization.

To facilitate implementation, the outcomes of the FOCAC follow-up mechanism and existing bilateral and regional cooperation platforms could be used to monitor the effective utilization of zero-tariff preferences, the local contributions of new-growth projects, and the sustainability performance of long-term projects. Lessons should be systematically documented and implementation tools adjusted accordingly.

This report encourages more Chinese enterprises to invest on the basis of Africa's actual needs and their own long-term capabilities, while supporting easier access to the Chinese market for more African enterprises and high-quality African products. It also calls on the governments of China and the countries of Africa to continue improving regulatory alignment, investment facilitation, financial services, and risk-mitigation mechanisms. The China–Africa Business Council will continue to serve as a bridge between the two sides. It will listen to the views of African governments, businesses, and communities, bring together expertise and resources in policy, industry, finance, law, and research, and promote responsible, sustainable, and scalable models of cooperation. In doing so, it seeks to transform the two-way flow of markets, capital, technology, talent, and development experience into opportunities for shared development, value creation, and prosperity.

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Corporate / Economic Zone Information

No.	Company Name	Address	Website	Email	Tel
Companies in the Case Study Boxes					
1	Tian Tang Group (Uganda) Co., Ltd.	Lugogo Plaza, Plot 62B, Lugogo Bypass Road, Kampala, Uganda	https://www.tian-tang-group.com/	shawn_lee@tian-tang-group.com	Uganda+256 707932162
2	UNISTEEL (Uganda) Limited	Plot 113-115, Tirinyi Road, Sino-Uganda Mbale Industrial Park, Mbale, Uganda	https://unisteelug.com/	info@unisteelug.com	+256 756 029 733; +256 708 322 222
3	Xinlong Textile & Garment Technology Co. Ltd.	Plot 62B1, Lugogo Bypass Road	https://www.tian-tang-group.com/	shawn_lee@tian-tang-group.com	Uganda+256 707932162
4	Nice Textiles Uganda Co., Ltd.	Plot 62B1, Lugogo Bypass Road	https://www.tian-tang-group.com/	shawn_lee@tian-tang-group.com	Uganda+256 707932162
5	Timber Paper Industry Uganda Co., Ltd.	Plot 378, Tirinyi Road, Sino-Uganda Mbale Industrial Park, Mbale, Uganda	https://www.timberpaper.com/	timberpaper@outlook.com	+256 705 666 888
6	China Energy International Group Co., Ltd.	Room 02, Unit 901, 9/F, Building 208, Ciyunsi Beili, Chaoyang District, Beijing, China	http://www.gjtt.ceec.net.cn/	zgnj3996@ceec.net.cn	+86 10 5952 5952
7	China Gezhouba Group Co., Ltd.	No. 558 Jiefang Avenue, Wuhan, Hubei Province, China	http://www.cggc.cn/	gzb@cggc.cn	+86 27 5927 1000
8	SANY Silicon Energy (Zhuzhou) Co., Ltd.	No. 333 Qingxia Road, Tongtangwan Subdistrict, Shifeng District, Zhuzhou, Hunan Province, China	https://siliconenergy.sany.com.cn/	Silicon_Energy@sany.com.cn	400 8878 318 (Customer Service in the Chinese Mainland)
9	BYD Company Limited	No. 3009 BYD Road, Pingshan District, Shenzhen, Guangdong Province, China	https://www.bydglobal.com/	db@byd.com.cn	+86 755 89888888
10	PalmPay Limited, Nigeria	-	https://www.palmpay.com/	palmpay-business@palmpay-inc.com	+234 201 888 6888
11	Shanghai Duochang Network Technology Co., Ltd.	Room 1208, No. 198 Jingzhou Road, Yangpu District, Shanghai, China	https://www.xtransfer.com/	helpdesk@xtransfer.com	400 998 9930 (Customer Service in the Chinese Mainland)

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13	Huawei Technologies Co., Ltd.	Huawei Headquarters Office Building, Bantian, Longgang District, Shenzhen, China	https://www.huawei.com/	-	+86 755 28780808
14	Hengtong Optic-electric Co., Ltd.	No. 88 Hengtong Avenue, Qidu Town, Wujiang District, Jiangsu Province, China	https://www.htgd.com.cn/	yyglb@htgd.com.cn	+86 512 6380 1380
15	HMN Technologies Co., Limited	Building 1-A2, Xinzhi Center, Information Park, Sino-Singapore Tianjin Eco-City, 300467, Tianjin, China	https://www.hmn-tech.com/	public.customer-service@hmn-tech.com	+86 10 5659 2220
16	China StarWin Science & Technology Co., Ltd.	3/F, Building B, No. 2 Keyuan South 2nd Road, Chengdu High-tech Zone, Sichuan Province, China	http://www.xuny-sat.com/	xywt@xuny-sat.com	+86 28 8503 2808
17	Huawei Cloud Computing Technologies Co., Ltd.	Huawei Cloud Data Center, Intersection of Qianzhong Avenue and Xingong Road, Gui'an New Area, Guizhou Province, China	https://www.huaweicloud.com/	partner@huawei-cloud.com	950808, then press 1 (Customer Service in the Chinese Mainland)
18	Shanghai Westwell Technology Co., Ltd	Room 503-3, No. 398 Jiangsu Road, Changning District, Shanghai, China	https://www.westwell-lab.com/	hello@westwell-lab.com	-
19	Guangdong New South Group Co., Ltd. (Overseas investment entity: Guangdong New South Overseas Investment Holdings Co., Ltd.)	No. 11 Shangdu Road, Haizhu District, Guangzhou, Guangdong Province, China	http://www.xnfht.com/	xnfhwztkg@gdx-nf.cn	+86 20 3414 1226
20	Goodwin Ceramic FZE; Brand: Goodwill	Igbesa, Ado-Odo/Ota LGA, Ogun State, Nigeria	https://www.goodwillceramic.com/About-us.html	goodwillceramic-ng@gmail.com	+234 706 733 1811
21	CNG Glass (Nigeria) FZE (Wholly owned subsidiary of China Glass Holdings Limited)	Ogun Guangdong Free Trade Zone, Igbesa Region, Ogun State, Nigeria	https://www.chinaglassholdings.com/en/contact.aspx	office@cng-glassnigeria.com	+234 9137173871
22	Huarui Industry FZE (Legal full name to be confirmed)	Ogun Guangdong Free Trade Zone, Igbesa, Ogun State, Nigeria	http://ogftzc.gztc-qf.com/en/	china_afri-ca080@163.com	+234 8133738099
23	Hewang Packaging & Printing FZE	Ogun Guangdong Free Trade Zone, Igbesa, Ogun State, Nigeria	http://ogftzc.gztc-qf.com/en/	china_afri-ca080@163.com	+234 8133738099
24	Jiangsu Yongyuan Investment Co., Ltd.	Xiangshan Road, Nansha, Jingang Town, China	http://www.e-eiz.com/	caoun@139.com	+86 512 5837 1658

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27	Yangfan Motors PLC, Ethiopia	Eastern Industry Zone, Dukem, Oromia, Ethiopia	http://www.e-eiz.com/	caoun@139.com	+251938299999
28	Lida (Ethiopia) Textile & Garment PLC, Ethiopia	Eastern Industry Zone, Dukem, Oromia, Ethiopia	http://www.e-eiz.com/	caoun@139.com	+251938299999
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31	Midea (Egypt) Kitchen & Water Heater Appliances Co., Ltd., Egypt	China-Egypt TEDA Suez Economic and Trade Co-operation Zone Expansion Area, Ain Sokhna, Suez, Egypt	https://www.midea.com/eg	bmdcx@teda.com.cn	-
32	Xinxing Ductile Iron Pipes (Egypt) Co., Ltd., Egypt	China-Egypt TEDA Suez Economic and Trade Co-operation Zone Expansion Area, Ain Sokhna, Suez, Egypt	https://www.xinxing-pipes.com/	xinxing@xxcig.com	-
33	Zhejiang Huayou Cobalt Co., Ltd.	No. 79 Wuzhen East Road, Tongxiang, Jiaxing, Zhejiang Province, China	https://www.huayou.com/	information@huayou.com	+86 573 8858 9981
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35	CNGR Advanced Material Co., Ltd.	Intersection of No. 2 Trunk Road and No. 1 Trunk Road, Dalong Economic Development Zone, Tongren, Guizhou Province, China	https://cngrgf.com.cn/	cngr@cngrgf.com.cn	+86 856 332 3580
36	Power Construction Corporation of China	9/F, Building 1, Yard 1, No. 1 Linglongxiang Road, Haidian District, Beijing, China	https://www.powerchina.cn/	zgdj601669@powerchina.cn	+86 10188985570

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52	Q-KON (Pty) Ltd, South Africa	8 Pieter Street, Technopark, Centurion, South Africa	https://www.qkon.com/	connect@qkon.com	+27 12 665 0052
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55	CMOC Kisanfu Mining S.A.R.L., Democratic Republic of the Congo	Bayeke, Lubudi, Lualaba, Democratic Republic of the Congo	https://en.cmoc.com/html/Business/Congo-Cu-Co/	-	-
56	Al Mada (Holding), Morocco	60, rue d'Alger, 20070 Casa-blanc, Morocco	https://www.almada.ma/en	contact@almada.ma	+212 529 43 21 00
57	COBCO S.A., Morocco	Zone d'Accelération Industrielle Jorf Lasfar, Commune Moulay Abdellah, El Jadida, Morocco	https://cobco.ma/	public@cobco.tech	+212 703 19 58 92
58	China Railway First Group Co., Ltd.	No. 1 Yanta North Road, Beilin District, Xi'an, Shaanxi Province, China	http://www.crfeb.com.cn/	ztyjbgs@163.com	-
59	CGCOC Group Co., Ltd.	1-3/F, Building 2, Yard 28, No. 28 Shangdi 6th Street, Haidian District, Beijing, China	http://www.cgcoc.com.cn/	office@cgcoc.com.cn	+86 10 84373600
60	SANY Renewable Energy Co., Ltd.	No. 8 Beiqing Road, Changping District, Beijing, China	https://www.sanyre.com.cn/	sanyremkt@sanygroup.com	+86 13220179865
61	Ethiopian Electric Power, Ethiopia	Bireta Biret, Kotebe, Addis Ababa, Ethiopia	https://www.eep.com.et/	info@eep.com.et	011-5-58-06-07; 011-5-58-08-05

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5	China-Africa Development Fund	No. 28 Fuxingmen Inner Street, Xicheng District, Beijing, China	https://www.cadfund.com/cadfund/index_pc.html	zonghebu@cadfund.com	+86 10 59892900; +86 10 59892800
6	The Export-Import Bank of China	No. 30 Fuxingmen Inner Street, Xicheng District, Beijing, China	http://www.exim-bank.gov.cn/	EXIM@EXIM-BANK.GOV.CN	400 636 1616(Customer Service in the Chinese Mainland)
7	China Export & Credit Insurance Corporation	Fenghui Times Building, No. 11 Fenghuiyuan, Xicheng District, Beijing, China	https://www.sinosure.com.cn/	khtw@sinosure.com.cn	+86 10 6658 2288
8	China Nonferrous Metal Mining (Group) Co., Ltd.	North Tower, China Nonferrous Metals Building, No. 10 Anding Road, Chaoyang District, Beijing, China	https://www.cnmc.com.cn/	cnmc@cnmc.com.cn	+86 10 8442 6666
9	SICOMINES S.A.	Kolwezi, Lualaba, Democratic Republic of the Congo	http://www.sicomines.com/cn/index.aspx	-	-
10	Hisense Group Holdings Co., Ltd.	No. 218 Qianwangang Road, Qingdao Economic and Technological Development Zone, Qingdao, Shandong Province, China	https://www.hisense.com/	huxiaoyang@hisense.com	+86 13792837739
11	Shenzhen Transsion Holdings Co., Ltd.	T33 Fulltime Center, No. 8 Xianyuan Road, Xili Subdistrict, Nanshan District, Shenzhen, Guangdong Province, China	https://www.transsion.com/	investor@transsion.com	+86 755 3397 9932
12	Huajian Group	Huajian Office Building, Shanggaopo, Shigu Community, Nancheng Subdistrict, Dongguan, Guangdong Province, China	http://www.huajian.com/	server@huajian.com	+8676988639999
13	Xiaomi Technology Co., Ltd.	Xiaomi Science and Technology Park, Anningzhuang Road, Haidian District, Beijing, China	https://www.mi.com/global/	ir@xiaomi.com	950816(Customer Service in the Chinese Mainland)

No.	Company Name	Address	Website	Email	Tel
14	Mainland Group	15/F, Building S1, AUX Chuanghui Business Center, Yanghu Subdistrict, Yuelu District, Changsha, Hunan Province, China	https://www.china-mainland.com/zh	marketing@china-mainland.com	+86 15576091717
15	JinkoSolar Holding Co., Ltd.	No. 1 Yingbin Avenue, Shangrao Economic and Technological Development Zone, Shangrao, Jiangxi Province, China	https://www.jinkosolar.com/	investor@jinkosolar.com	-
16	Hainan Branch of China Harbour Engineering Company Ltd.	No. 9 Chunxiu Road, Dongzhimenwai, Dongcheng District, Beijing, China	https://www.checbj.cn/	-	+86 10 6415 4455
17	China International Water & Electric Corp.	Beitou Building, No. 8 Tongji Road, Tongzhou District, Beijing, China	https://www.cwe.cn/	cweheadoffice@ccccltd.cn	+86 010 56130567
18	CHN Energy Longyuan Power South Africa Branch	Cape Town, South Africa	https://lydl.chnenergy.com.cn/	p0004943@chnenergy.com.cn	-
19	StarTimes Communication Network Technology Co., Ltd.	Yard 5, No. 5 Kechuang 14th Street, Beijing Economic-Technological Development Area, Beijing, China	https://www.startimes.com.cn/	contact@startimes.com.cn	+86 10 5612 9200
20	Beijing JA Solar Energy Storage Technology Co., Ltd.	Room 1001, South Tower, 9/F, Building 4, Yard 1, Automobile Museum East Road, Fengtai District, Beijing, China	https://www.jasolar.com/	info@jasolar.com	+86 10 6361 1960
21	Gotion High-tech Co., Ltd.	No. 566 Huayuan Avenue, Baohe District, Hefei, Anhui Province, China	https://www.gotion.com.cn/	emea_mkt@gotion.com	400 110 8181 (Customer Service in the Chinese Mainland)
22	Geely Auto Group	No. 1760 Jiangling Road, Binjiang District, Hangzhou, Zhejiang Province, China	https://global.geely.com/	globalservice@geely.com	-
23	Shanghai Launch Automotive Technology Co., Ltd.	No. 2072 Songjin Highway, Zhangyan Town, Jinshan District, Shanghai, China	https://www.launchdesign.com.cn/	IRLaunch@launchdesign.com.cn	+86 21 6764 9079
24	Dongfeng Motor Corporation	No. 1 Dongfeng Avenue, Wuhan Economic and Technological Development Zone, Wuhan, Hubei Province, China	https://www.dfmc.com.cn/	-	-
25	ePure Motion Limited, Kenya	GTC Office Tower, 14th Floor, Westlands Road, Nairobi, Kenya	https://www.epuremotion.com/	epure@epuremotion.com	+254 714 519744

No.	Company Name	Address	Website	Email	Tel
26	UnionPay International Co., Ltd.	9/F, No. 1899 Guozhan Road, China (Shanghai) Pilot Free Trade Zone, Shanghai, China	https://www.unionpayintl.com/	-	+86 21 20265666
27	Ant Group Co., Ltd.	Room 517, 5/F, Building 2, Building 1, Nos. 543-569 Xixi Road (consecutive odd numbers), Xihu District, Hangzhou, Zhejiang Province, China	https://www.ant-group.com/	Ant_Investor@antgroup.com	+86 571 2688 8888
28	PayEase Technology (Beijing) Co., Ltd.	Room 1602, 16/F, No. 6 Jianguomenwai Street, Jianguo Road, Chaoyang District, Beijing, China	https://www.beijing.com.cn/2.0	cs@payeasenet.com	400 698 0966 (Customer Service in the Chinese Mainland)
29	OPay Digital Services Limited, Nigeria	Alexander House, Plot 9, Dr. Nurudeen Olowopopo Avenue, Alausa, Lagos, Nigeria	https://www.opay-web.com/	-	+234 916 599 8936; 0700 8888 328/020 18888 328; 0700 8888 329/020 18888 329
30	Jumia Nigeria	9 Canal View Layout, Ajao Estate, Lagos, Nigeria	https://www.jumia.com.ng/	-	02018881106
31	ZTE Corporation	ZTE Building, Keji South Road, High-Tech Industrial Park, Nanshan District, Shenzhen, China	https://www.zte.com.cn/	csr@zte.com.cn	+86 755 26770000
32	Telecom Egypt S.A.E.	B7, Smart Village, K28 Cairo-Alexandria Road, Cairo, Egypt	https://te.eg/	customer.care@te.eg	+20 1555000111
33	China Jiangxi International Economic and Technical Cooperation Co., Ltd.	No. 1198 Fenghe Middle Avenue, Honggutan New District, Nanchang, Jiangxi Province, China	https://www.cjic.cn/	jic@cjic.cn	+86 791 8637 3154
34	Kilimall International Limited, Kenya	Office 18-Athi 55, Mombasa Road, Athi River, P.O. Box 29980-00100, Nairobi, Kenya	https://www.kilimall.co.ke/	cc@kilimall.com	+254 711 082 780
35	Ethiopian Airlines Group, Ethiopia	Ethiopian Airlines Headquarters, Bole International Airport, Addis Ababa, Ethiopia	https://www.ethiopianairlines.com/	CustomerRelations@ethiopianairlines.com	+251 11 617 9900
36	Guangzhou XAG Co., Ltd.	Building C, No. 115 Gaopu Road, Tianhe District, Guangzhou, Guangdong Province, China	https://www.xa.com/	overseas@xa.com	+86 20 3921 8499
37	SZ DJI Technology Co., Ltd.	DJI Sky City, No. 55 Xianyu-an Road, Nanshan District, Shenzhen, Guangdong Province, China	https://www.dji.com/	pr@dji.com	+86 755 26656677

No.	Company Name	Address	Website	Email	Tel
38	EHang Holdings Limited	EHang Future City (Group Headquarters), No. 118 Dongjiang Avenue, Huangpu District, Guangzhou, China, 510730	https://www.ehang.com/	service@ehang.com	+86 20 29028899
39	Jushi Egypt for Fiberglass Industry S.A.E.	3rd Sector of North-West Gulf of Suez Economic Zone, Ain Sokhna, Suez, Egypt	https://www.jushi.com/en/business/group-479.html	ahmed.galal@jushi.com	+20 109 367 3665
40	XD-EGEMAC High Voltage Electric Equipment Co., Ltd., Egypt	Economic and Industrial Development Zone at El-Ain El-Sokhna, North West of the Suez Gulf, Suez Governorate, Egypt	https://www.xde-gemac.net/	sales@xdegemac.net	+20 62 3597078/79/80 /81; +20 2 27244435
41	Sinosteel Corporation	No. 8 Haidian Street, Haidian District, Beijing, China	https://www.sinosteel.com/	office@sinosteel.com	+86 10 6268 6689
42	Samancor Chrome Limited, South Africa	1st Floor, Block A, Cullinan Place, Cullinan Close, Morningside, Sandton 2196, South Africa	https://samancor-cr.com/	webmaster@samancorcr.com	+27 11 245 1000
43	China Mobile International Limited	Level 30, Tower 1, Kowloon Commerce Centre, No. 51 Kwai Cheong Road, Kwai Chung, N.T., Hong Kong, China	https://www.cmi.chinamobile.com/	-	+852 3975 6688
44	Hubei Ceres Technology Co., Ltd.	Room 703, Gaonong Building, No. 519 Luoshi South Road, Hongshan District, Wuhan, Hubei Province, China	https://www.hubeiceres.com/	info@hubeiceres.com	+86 27 8775 0615
45	Alibaba Cloud Computing Co., Ltd.	Room 1-2-A06, Yungu Park, No. 1008 Dengcai Street, Sandun Town, Xihu District, Hangzhou, Zhejiang Province, China	https://www.aliyun.com/	-	95187, then press 1 (Customer Service in the Chinese Mainland)
46	Talaat Moustafa Group Holding S.A.E., Egypt	34/36 Mussadak St., Cairo, Egypt	https://talaat-moustafa.com/	TMGH@tmg.com.eg	+20 2 3301 6701; +20 2 3331 2000
47	Hangzhou Tigermed Consulting Co., Ltd.	Rooms 601-610, 6/F, No. 508 Lujiatan Street, Puyan Subdistrict, Binjiang District, Hangzhou, Zhejiang Province, China	https://www.tiger-medgrp.com/	clientservice@tigermedgrp.com	+86 571 2888 7227
48	Purpose Africa, Rwanda	Gaculiro, Plot 18, 3rd Floor KG 383 St., Kigali, Rwanda	https://www.purposeafrica.com/	info@purposeafrica.com	-
49	Eskom Holdings SOC Limited, South Africa	1 Maxwell Drive, Megawatt Park, Sunninghill, Johannesburg 2000, South Africa	https://www.eskom.co.za/	-	+27 11 800 5025; 086 00 37566

No.	Company Name	Address	Website	Email	Tel
50	Kerry Oils & Grains (Qingdao) Ltd.	No. 99 Qianwangang Road, Qingdao Economic and Technological Development Zone, Shandong Province, China	https://www.yihaikerry.net.cn/	-	-
51	Sinomine Resource Group Co., Ltd.	39/F, Rayzone, No. 161 Jinze Road, Fengtai District, Beijing, China	https://www.sino-mine.cn/	sinomine@sino-mine.com	+86 10 8858 8188
52	Zijin Mining Group Co., Ltd.	No. 1 Zijin Avenue, Shanghang County, Fujian Province, China	https://www.zjky.cn/	zjky@zjky.cn	+86 597 383 3015
53	Weihai International Economic & Technical Cooperative Co., Ltd.	No. 16 Tongyi Road, Weihai, Shandong Province, China	http://www.wietc.com	qfb@wietc.com	+86 631 521 8791
54	Hunan Modern Agriculture International Development Co., Ltd.	Room 101, Factory Building 1, Huazhi Rice Bio-Tech Co., Ltd., No. 618 Heping Road, China (Hunan) Pilot Free Trade Zone, China	-	haic_office@hunanancof.com	+86 731 8558 7668
55	Yuan's Hi-Tech Seed Co., Ltd.	Dayutang Village, Chunhua Town, Changsha County, Hunan Province, China	www.yuanshi-seed.com	38763474@qq.com	+86 731 8553 0709
56	Hunan Jianglai Food Co., Ltd.	Room 1-301, Building 3, Factory Buildings, east of Xiaoxiang Avenue, west of Xingsheng Road and north of Shuangtan Road, Yongzhou Economic and Technological Development Zone, Hunan Province, China	-	-	+86 180 7465 1177
57	China Light Industry Nanning Design Engineering Co., Ltd.	No. 42 Xingguang Avenue, Nanning, Guangxi, China (within China Light Industry Nanning Design Engineering Co., Ltd.)	https://www.cndc-pl.com/	office@cndc-pl.com	+86 771 480 0448
58	KAISHAN GROUP CO., LTD.	No. 851 Feidu Road, Lingang Special Area, China (Shanghai) Pilot Free Trade Zone, Shanghai, China	https://www.kaishancomp.com/	kaishan@kaishangroup.com	400 8267 771 (Customer Service in the Chinese Mainland)
59	Vodacom Group Limited, South Africa	Vodacom Corporate Park, 082 Vodacom Boulevard, Midrand 1685, South Africa	https://www.vodacom.com/	vodacomir@vodacom.co.za	+27 11 653 5000
60	ARISE Integrated Industrial Platforms (ARISE (Shanghai) Business Management Consulting Co., Ltd.)	5/F, Building 11, No. 6055 Jinhai Highway, Fengxian District, Shanghai, China	https://www.ari-seipcn.com/	sandra.zou@arisenet.com	+86 21 3208 2655

No.	Company Name	Address	Website	Email	Tel
61	China Communications Construction Company Limited	No. 85 Deshengmen Outer Street, Xicheng District, Beijing, China	https://www.ccccltd.cn/	ir@ccccltd.cn	+86-10-82016562
50	China Road and Bridge Corporation	Room 1008, No. 88C Andingmen Outer Street, Dongcheng District, Beijing, China	https://www.crbc.com	cog@crbc.com	+86-10-64280055
51	China Railway Group Limited	China Railway Building, Building 9, No. 69 Fuxing Road, Haidian District, Beijing, China	https://www.crecg.com	-	-
52	China Railway Construction Corporation Limited	East Yard, No. 40 Fuxing Road, Haidian District, Beijing, China	https://www.crcc.cn	ir@crcc.cn	+86-10-51888114
53	China Hongqiao Group Limited	Room 5105, 51/F, Cheung Kong Centre, 2 Queen's Road Central, Central, Hong Kong	http://en.hongqiao-ochina.com/	luciyu@hongqiao-ochina.com	+852 2815 1080
54	Winning International Group	5 Shenton Way, UIC Building, #19-06, Singapore 068808	https://www.winninggroup.com.sg	info@winning-group.com.sg	+65 62260169/ +65 63230027
55	Shandong Port Yantai Port Group Co., Ltd.	No. 1 Gangwan South Avenue, Zhifu District, Yantai, Shandong Province, China	https://www.yantaiport.com.cn	ytgbgs@163.com	+86 535 650 7111; 400 008 5999 (Customer Service in the Chinese Mainland)
56	China Baowu Steel Group Corporation Limited	No. 1859 Shibo Avenue, China (Shanghai) Pilot Free Trade Zone, Shanghai, China	https://www.baowugroup.com	webmaster@baowugroup.com	+86-21-20658888
57	Aluminum Corporation of China	18/F, 22/F and 28/F, No. 62 Xizhimen North Street, Haidian District, Beijing, China	https://www.chinalco.com.cn	zbs@chinalco.com.cn	+861082298080
58	Lekki Free Zone Development Company, Nigeria	Opposite Tiye Town, Akodo Road, off Lekki-Epe Coastal Road, Lagos, Nigeria	https://lfzdc.org/	info@lfzdc.org	+234 707 427 0008; +234 704 329 4016
59	LONGi Green Energy Technology Co., Ltd.	No. 8369 Shangyuan Road, Xi'an Economic and Technological Development Zone, Shaanxi Province, China	https://www.longi.com/cn/	market@longi.com	4008 601012 (Customer Service in the Chinese Mainland)
60	Trina Solar Co., Ltd.	No. 2 Tianhe Road, Trina PV Industrial Park, Xinbei District, Changzhou, Jiangsu Province, China	https://www.trina-solar.com/cn/	sales@trinasolar.com	+86 519 8517 6109; 400 689 0000 (Customer Service in the Chinese Mainland)
57	Sungrow Power Supply Co., Ltd.	No. 1699 Xiyao Road, Hefei High-Tech Industrial Development Zone, Anhui Province, China	https://cn.sungrowpower.com/headquarter.html	-	+86 551 6532 7878; +86 551 6532 7877

No.	Company Name	Address	Website	Email	Tel
58	Huawei Digital Power Technologies Co., Ltd.	Room 01, R&D 39/F, Tower A, Antuoshan Headquarters Building, No. 33 Antuoshan 6th Road, Xiang'an Community, Xiangmihu Subdistrict, Futian District, Shenzhen, Guangdong Province, China	https://digitalpower.huawei.com/cn/contact-us	support@huawei.com	-
59	Development Reimagined Co., Ltd.	Room 2503-5, 21/F, Building 1, No. 12C Guanghua Road, Chaoyang District, Beijing, China	https://developmentreimagined.com/contact-us/	hannahryder@me.com	+86 183 102 31981
60	China Geo-engineering Corporation	Building 2, Yard 92, Xiangshan South Road, Haidian District, Beijing, China	http://www.china-geo.com.cn/	admin@chinageo.com.cn	+86 10 82408500

Special Economic Zones and Industrial Parks in the Report

1	Pilot Zone for In-depth China-Africa Economic and Trade Cooperation	Hunan Province, China	-	-	-
2	Eastern Industry Park, Ethiopia	Dukem, Oromia Special Zone Surrounding Finfinne, Ethiopia	http://www.e-eiz.com/en/	eiztrip@gmail.com	+251 11 3726966
3	Sino-Uganda Mbale Industrial Park, Uganda	Tirinyi Road, Mbale, Uganda	http://www.zwmip.com/english/	shawn_lee@tian-tang-group.com	+86 15900300299 /+256 759988888
4	Lekki Port LFTZ Enterprise Limited, Nigeria	C/O Lagos Free Trade Zone, Itoke Village, Ibeju-Lekki, Lagos, Nigeria	https://lekkiport.com/	lekkiport@lekkiport.com	+234 901 123 4560
5	Zambia-China Economic and Trade Cooperation Zone, Zambia	Kitwe-Chingola Road, Chambishi, Zambia	www.zccz.cnmc.com.cn	mengzhiguo@zccz.cnmc.com.cn	+260-972-455 988
6	Hisense S.A. (PTY) Ltd., South Africa	Atlantis Industrial Park, Cape Town, South Africa	https://hisense.co.za/company/	huxiaoyang@hisense.com	+86 13792837739
7	Egypt TEDA Special Zone Development Company	Plot 3, North-West Suez Bay Special Economic Zone, Ain Sokhna, Suez Governorate, Egypt	https://en.setc-zone.com/	suez@setc-zone.com	+20 10 6665 2313
8	Ogun-Guangdong Free Trade Zone	Igbesa, Ado-Odo/Ota Local Government Area, Ogun State, Nigeria	http://ogftzc.gztc-qf.com/en/	china_africa080@163.com	+234 8133738099
9	Smart Villages Development and Management Company, Egypt	Building B19, Smart Village Egypt, Giza 12577, Egypt	https://www.smart-villages.com/	info@smart-villages.com	-
10	Yiwu Cross-Border E-Commerce Industrial Park	Core Area, Yiwu Free Trade Zone, Yiwu, Jinhua, Zhejiang Province, China	-	-	-

No.	Company Name	Address	Website	Email	Tel
11	Tanzania's East Africa Commercial and Logistics Center	Ubungu, Dar es Salaam, Tanzania, adjacent to the BRT bus terminal	http://www.weihai-huatan.com/index.html	huatan@huatan-supplychain.com	+86 631 3959599
12	Sino-Tan / Kwala Industrial Park	Core Area of Kwala Industrial Park, Kibaha, Coast Region, Tanzania	http://www.stindustrialpark.com/	sinotan_industrialpark@hotmail.com	+255 762 668 888; +255 757 176 668; +86 139 6717 3887
13	Lekki Free Zone, Nigeria	Opposite Tiye Town, Akodo Road, off Lekki-Epe Coastal Road, Lagos State, Nigeria	https://lfzdc.org/	marketing@lfzdc.org	+234 916 344 4472; +234 816 069 1001; +234 805 799 3346; +234 707 427 0008
14	China-Egypt TEDA Suez Economic and Trade Cooperation Zone	Plot 3, Ain Sokhna, Northwest Gulf of Suez Economic Zone, Suez Governorate, Egypt	https://en.setc-zone.com/	suez@setc-zone.com	+20 10 6665 2313
15	Smart Village Park, Egypt	Building B19, Smart Village Egypt, Giza 12577, Egypt	https://www.smart-villages.com/	info@smart-villages.com	-
16	Hubei Ceres Science and Technology Park	Group 7, Shahuling Village, Xinjie Town, Jiayu County, Xianning, Hubei Province, China	-	info@hubeiceres.com	+86 27 87750615
17	Wanbao Mozambique Agricultural Park	Along the Limpopo River, Xai-Xai, Gaza Province, Mozambique	-	-	-

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As data, policies, and corporate information continue to evolve, some information in the report may require further verification or updating. We welcome readers to contact us with any corrections, factual clarifications, or other relevant feedback.

Core Members

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