



**DEVELOPMENT
REIMAGINED**



Africa-China Cooperation

in the Post-COVID Era

2024

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INTRODUCTION

Reasons for this report

This report, prepared by Development Reimagined¹, reviews the actions taken between January 2023 and June 2024 in Africa and China cooperation – a time period that captures China’s full return to the global arena from the COVID-19 pandemic. The report seeks to identify key areas of cooperation, particular trends (as compared to pre-pandemic ones where available) and outcomes at all levels of engagement between China and African countries during the period under review, to shed light on the future direction of Africa-China cooperation in a post-pandemic context.

Development Reimagined hopes that this informational report can serve to support a wide range of actors and stakeholders working in the field of Africa-China cooperation to obtain evidence and data-driven understanding of the activities, projects, and initiatives that have taken shape in the Africa-China relationship. Building on our previous work, including the Blueprint for Africa-China cooperation published in June 2021², as well as past dialogues and retreats convened and attended by Development Reimagined, the African Union Mission and Representative Office in China, and other key partners and stakeholders, the report concludes with a summary of important trends, figures, achievements, and gaps in the most immediate 18 months after the pandemic to further improve the quality and increase the mutual benefit of Africa-China cooperation.

Background on Recent Africa-China Cooperation Commitments

After almost 3 years of intermittent recoveries from the Covid pandemic, Africa-China cooperation has shown resilience with many areas resuming high-level engagement and others rebounding to pre-pandemic levels. Most notably, despite disruptions to other areas of engagement, the 8th Ministerial Conference of the Forum for China-Africa Cooperation (FOCAC 8) was held virtually in November 2021 in Dakar, Senegal, amid the pandemic as planned. Established in 2000 at the request of African countries, FOCAC is a triennial high-level forum between China and the 53 African countries with diplomatic relations with China.

The theme of FOCAC 8 was to “Deepen China-Africa partnership and Promote Sustainable Development to Build a China-Africa Community with a Shared Future in the New Era”. The Conference delivered major announcements and resolutions, including the Dakar Action Plan³, the China-Africa Cooperation Vision 2035⁴, the Declaration on China-Africa cooperation on combating climate change⁵, and the Dakar Declaration of the 8th Ministerial Conference of FOCAC⁶. In addition, President Xi announced nine focus areas for the next three years, including health, poverty reduction and agriculture, trade, investment, digital innovation, green development, capacity building, people-to-people exchanges, and peace and security. The 9th Summit (attended

¹ Development Reimagined is a pioneering, African-led, women-led, and award-winning international development consultancy based in Beijing, China, with offices in Kenya and the United Kingdom.

² Development Reimagined, 'From China-Africa to Africa-China: A Blueprint for a Green and Inclusive Continent-Wide African Strategy towards China', 2021, <https://developmentreimagined.com/from-china-africa-to-africa-china-a-blueprint-for-a-green-and-inclusive-continent-wide-african-strategy-towards-china/>

³ http://www.focac.org/eng/zywx_1/zywj/202201/t20220124_10632444.htm

⁴ http://www.focac.org/eng/zywx_1/zywj/202201/t20220124_10632442.htm

⁵ http://www.focac.org/eng/zywx_1/zywj/202201/t20220124_10632445.htm

⁶ http://www.focac.org/eng/zywx_1/zywj/202201/t20220124_10632443.htm

by heads of state and government)⁷ of the Forum for China-Africa Cooperation (FOCAC) is scheduled to be held in Beijing this September.

Between these two high-level meetings of Africa-China cooperation, President Xi made his first trip after the pandemic in August 2023 to Africa by attending the Africa-China Leaders dialogue on the sidelines of the BRICS summit in South Africa.⁸ In his remarks during this engagement, he called strongly for China's support for Africa's modernisation⁹ underpinned by three new initiatives.

First, the **"Initiative on Supporting Africa's Industrialisation"** was intended to utilise existing structures of FOCAC, the Belt and Road Initiative (BRI), and the new Global Development Initiative (GDI) to channel resources for assistance, investment, and financing programmes of manufacturing and value-addition. These are major priorities for every African country, especially during the post-pandemic. The African Union adopted the "Accelerated Industrial Development for Africa"¹⁰ as well as the Africa Mining Vision (AMV)¹¹ back in 2008 and industrialisation was the main topic of the 2022 special African Union summit in Niger¹².

Second, the **"Plan for China Supporting Africa's Agricultural Modernisation"** looks to expand grain cultivation, provide emergency food assistance, and encourage Chinese companies to boost agricultural investment in Africa. This initiative is particularly important in the context of African goals for food sovereignty—a push for African countries to be able to feed themselves¹³.

Third, the **"Plan for China-Africa Cooperation on Talent Development"** is particularly interesting. It sees China planning to train 500 principals and high-level teachers in vocational schools, as well as 10,000 technical personnel per year in both vocational skills and the Chinese language. The initiative also incorporated a plan to invite 20,000 African government officials and technicians to China for workshops and seminars. Collectively, these new human capital-related ideas represent a major shift from previous FOCAC commitments, which have primarily focused on African students studying in China¹⁴.

Finally, the China-Africa Leaders Dialogue held on the sidelines of the BRICS summit indicated progress on Africa's own institutions and voice in multilateralism. President Xi referred for the first time to the Pan-African Payment and Settlement System (PAPSS)¹⁵, a structure launched in 2022 to bypass SWIFT for African local currency exchanges (which China itself does through its Cross-Border Interbank Payment System (CIPS) and the African Union of Broadcasting¹⁶, which was established in 1962 and revamped in 2006. President Xi also stated that China "will support Africa in speaking with one voice on international affairs and continuously elevating its international standing."

Last but not least, it is also important to note the "Dar-Es-Salaam Consensus" adopted by Africa-China think tanks at their 13th Forum in March 2024¹⁷. This included references *inter alia* to Africa's Agenda 2063, the BRI, the GDI, the Global Security Initiative (GSI), the Global Civilisation

⁷ <https://english.news.cn/20240307/219019b5c8624c598b10023759ac3538/c.html>

⁸ https://www.fmprc.gov.cn/eng/zxxx_662805/202308/t20230825_11132532.html

⁹ <https://www.globaltimes.cn/page/202308/1296997.shtml>

¹⁰ <https://au.int/en/ti/aida/about#:~:text=Development%20and%20implementation%20of%20an,industries%2C%20including%20the%20informal%20sectors>

¹¹ <https://au.int/en/ti/amv/about>

¹² <https://au.int/en/summit-africa-industrialization-economic>

¹³ <https://developmentreimagined.com/can-african-countries-feed-themselves-our-new-analysis-reveals-all/>

¹⁴ <https://developmentreimagined.com/where-africans-study-abroad-post-covid19/>

¹⁵ <https://papss.com>

¹⁶ <https://www.uar-aub.org/about-1>

¹⁷ <https://africachinacentre.org/the-dar-es-salaam-consensus-african-and-chinese-think-tanks-on-deepening-global-development-cooperation/>

Initiative (GCI), the establishment of a fair and objective international credit rating agency, and to strengthening global economic governance, eliminating trade and economic barriers, and establishing more resilient, inclusive, smooth, and efficient global supply chains.

The outcomes and activities of and since FOCAC 2021, the 2023 Africa-China Leaders dialogue, and the Dar-Es-Salaam Consensus all provide an important context for understanding the trends and opportunities in Africa-China cooperation during the period of January 2023 to June 2024 summarised in the report below¹⁸.

Methodology of this report

Since January 2023, Development Reimagined has maintained a database compiling publicly recorded actions involving African and Chinese stakeholders – including governments, the private sector, and actors from civil society. The compilation process was undertaken through desk research, drawing on a wide range of **entirely public sources**, including official government sources, such as state statistical agencies and ministry websites in both China and Africa, as well as non-government sources, such as media reports and databases maintained by organisations such as UNCTAD, UNWTO, UNWHO etc. which provide data on different aspects of Africa-China cooperation.

When compiling the research, we aimed to follow the key areas of cooperation identified in the key statements and official policy-guiding documents as much as possible. As this report focuses on the post-pandemic context, the data presented is mainly for 2023 and the first half of 2024, with some information included from 2021 and 2022 to provide a specific context for an analysis to understand recent achievements and cooperation tendencies.

There are some important limitations to our methodology. First, as stated above, the data collected was only for 2023 and the first two quarters of 2024, so it should not be used on its own to make major conclusions about Africa-China cooperation over the years. Second, available financial information from public sources was limited, for instance, information on funding or loans for projects involving African and Chinese stakeholders. Furthermore, our data compilation process was limited to publicly available information, meaning that the outcomes reported here could be incomplete or underestimated. Although these challenges notwithstanding, we are confident that the available data we present in this report will help to paint a reliable and fair picture of what transpired in Africa-China relations during the period following the COVID-19 pandemic.

Overview of the main progress (January 2023-June 2024)

- **China and African countries continue to invest substantial efforts in partnership**, especially at the political level, including through stronger engagement by the African Union and relevant African agencies. Between 2022 and 2024, there were 28 high-level visits by African leaders to China and 25 high-level visits by Chinese leaders to different African countries. The former is higher than usual, and the latter is on par with an annual average of 7 visits between 2009 and 2018¹⁹ in 2022 and 2023, with a clear increase in the first six months of 2024.

¹⁸ <https://thediplomat.com/2023/09/the-latest-china-africa-leaders-dialogue-what-has-changed/>

¹⁹ Wigmore, Rosie, 'Power Plays: Why Are More African Leaders Visiting China Despite Geopolitics?', 2023, <https://www.theafricareport.com/324794/power-plays-why-are-more-african-leaders-visiting-china-despite-geopolitics/>

- **China-Africa trade in goods reached a new high of USD 282 billion in 2023.** Although exports from African countries declined by 7% between 2022 and 2023, with imports from Africa totalling USD 109 billion in 2023, **China is on track to fulfil its commitment to import USD 300 billion worth of goods in total from Africa over three years by the end of 2024.** African exports to China also diversified somewhat, with 27 African countries being granted zero-tariff treatment on 98% of exports to China by the end of 2023, though total exports remain primarily focused on raw commodities versus value-added products. On the other hand, the 8% increase in African imports from China to USD 173 billion further widened Africa's trade deficit with China. However, in the first two quarters of 2024, the trade deficit shrunk modestly, with China's imports from Africa rising by 14% year on year to reach USD 60.15 billion in the first half of 2024, while Chinese exports to the continent declined marginally by 2.3% to USD 84.85 billion. Meanwhile, the total China-Africa trade reached USD 145 billion in the first half of the year, which is on track to exceed total China-Africa trade in 2023.
- **For 2021 and 2022, there were at least 16 new (bilateral) loan commitments worth approximately USD 2 billion** from Chinese lenders to African countries, significantly lower than historical trends. In addition, African governments procured and financed significant numbers of projects constructed by Chinese firms. There remains a strong case on both sides for highly concessional lending from China to scale up quickly, especially for cross-country infrastructure projects and those linked to the African Union's Project for Infrastructure Development in Africa (PIDA) and the African Continental Free Trade Area (AfCFTA).
- After facing a sharp decline between 2021 and 2022, **Chinese Foreign Direct Investment (FDI) flows to Africa, including through PPPs, rebounded in 2023, reaching approximately USD 2 billion by mid-2023.** However, this means that, particularly due to COVID-19, **the FOCAC 8 commitment to invest at least USD 10 billion in Africa is unlikely to be met by the end of 2024,** unless there is a huge shift in the coming months prior to FOCAC 9. In 2022, Chinese FDI stocks in Africa stood at USD 40 billion. Chinese investment showed trends of diversification in 2023, particularly into digital innovation, however, construction and mining still accounted for almost 60% of China's investment stock in Africa, while manufacturing accounted for only 13%.
- **With a total of 72 projects worth more than USD 20 billion, Africa was the leading region for Chinese engagement in green energy investments in 2023.** Photovoltaic (PV) power has emerged as a focal point in Africa-China cooperation on clean energy, with 23 active projects, of which 19 were newly established in 2023. Southern Africa stood out as the most sought-after sub-region for PV development, boasting 10 projects. In the first half of 2024, PV continued its dominance in China-Africa green energy cooperation, accounting for almost 50% (18 projects) out of 40 projects undertaken in this space.
- Since January 2023, cooperation in **agriculture, health, tourism, education cooperation, and peace and security** both resumed and continued, albeit at differing paces, and in some cases, further new commitments were made. For instance, **the second Forum on China-Africa Agricultural Cooperation in November 2023** in Hainan (following the 2019 inaugural forum), saw China commit to training 1,000 African technical and managerial personnel in the next three years and to promote trade value in agricultural products to more than USD 20 billion within the next decade. **The third edition of the China-Africa Peace and Security Forum** was held in Beijing in August 2023. In the education sector, **a joint conference of Confucius Institutes in Africa** was held in



May 2024 at the University of Nairobi, attended by nearly 100 representatives from various Confucius Institutes and Classrooms across the African continent.

Although there has been notable progress on many areas of Africa-China cooperation since January 2023, there are also some for which publicly available information remains scarce—for instance, China’s commitment to provide USD 10 billion in trade finance to Africa, or numbers of African students in China—making it challenging to provide helpful analysis for consideration in future African strategies related to China.

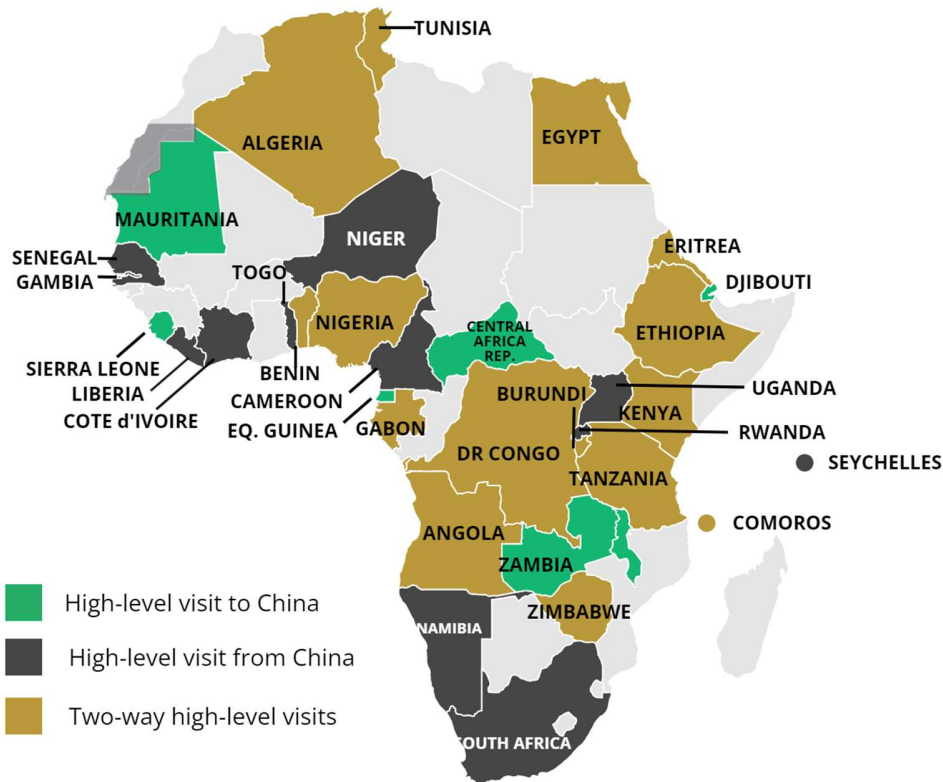
CHAPTER 1 - POLITICAL COOPERATION

Key Expectations (e.g. at FOCAC 8):

1. Maintain close high-level exchanges
2. Improve the planning and implementation of China-Africa cooperation strategies
3. Strengthen China's cooperation with the African Union and affiliate institutions
4. Continue to support each other in international affairs and major multilateral votes

1.1 High-level Visits and Dialogues

Figure 1: Top Leadership Visits Between China and African Countries from January 2023 to June 2024



Frequent high-level political engagement between China and Africa resumed in 2023 as China reopened itself to the world and continued into 2024. In 2023, at least 19 high-level African officials visited China.²⁰ In the first half of 2024, at least nine African high-level officials visited China, including five presidential visits from Angola, Equatorial Guinea, Guinea-Bissau, Sierra Leone, and Tunisia (Figure 1).

²⁰ Includes Presidents, Vice Presidents, Prime Ministers, and Foreign Ministers.

In June 2024, the first plenary meeting of the China-Nigeria Intergovernmental Committee was held in Beijing, attended by Foreign Ministers and other high-level officials from both sides. It should be noted that this is the first intergovernmental committee mechanism established between China and an African country.²¹ The Intergovernmental Committee has subcommittees on politics and diplomacy, culture and tourism, economy and trade, agriculture, and security and defence. It seeks to chart out overall plans for future cooperation between the two countries and sets a new example of China-Nigeria and China-Africa relations.²²

Meanwhile, there were 24 visits by high-level Chinese officials to African countries during the time period examined. The African continent remained the first destination for the Chinese Foreign Minister at the beginning of each year between 2022 and 2024. Consequently, **at least nine African countries have upgraded the status of their diplomatic partnership with China since FOCAC 8** (Table 1). **These high-level visits also facilitated trade deals**, as our previous analysis has shown.²³ In 2023, Africa-China leadership visits resulted in at least 13 Sanitary and Phytosanitary (SPS) agreements, facilitating African agricultural exports to China (see further).²⁴

Table 1: African Countries that Upgraded Diplomatic Partnerships with China²⁵

Country	Partnership Upgrade	Date
Guinea-Bissau	Strategic Partnership	2024-07-10
Equatorial Guinea	Comprehensive Strategic Partnership	2024-05-28
Angola	Comprehensive Strategic Partnership	2024-03-16
Ethiopia	All-weather strategic partnership	2023-10-17
Zambia	Comprehensive Strategic Partnership	2023-09-15
Benin	Strategic Partnership	2023-09-01
DR Congo	Comprehensive Strategic partnership	2023-05-26
Gabon	Comprehensive Strategic Partnership	2023-04-19
Tanzania	Comprehensive Strategic Partnership	2022-11-03

In addition to bilateral meetings, **forums and dialogues were an important platform for Chinese and African leaders to engage in high-level conversations**. For instance, President Xi Jinping co-hosted the China-Africa Leaders' Dialogue on the sidelines of the BRICS Summit in Johannesburg in August 2023. In October, African leaders from Egypt, Ethiopia, Congo, Kenya, Mozambique, and Nigeria participated in the third Belt and Road Forum held in Beijing.

²¹ Ministry of Foreign Affairs, 'The first plenary meeting of the China-Nigeria Intergovernmental Committee was held in Beijing', 2024, https://www.mfa.gov.cn/web/wjbxhd/202406/t20240621_11439840.shtml

²² Forum on China-Africa Cooperation, 'Ministry of Foreign Affairs Regular Press Conference on 24 June', 2024, http://www.focac.org/zfgx/zzjw/202406/t20240624_11440730.htm

²³ The Africa Report, 'Power Plays: Why are more African leaders visiting China despite geopolitics?', 2023, <https://www.theafricareport.com/324794/power-plays-why-are-more-african-leaders-visiting-china-despite-geopolitics/>

²⁴ Seven such agreements resulted from Chinese leaders' visits to African countries and another six followed visits from African leaders to China.

²⁵ Data retrieved from the Ministry of Foreign Affairs, China.

1.2 Exchanges Between Political Parties, Legislatures, and Local governments²⁶

2023 and 2024 saw a growing number of exchanges between China and African countries at the sub-national level. **There were at least 33 in-person meetings between the Communist Party of China (CPC) and African political parties** during the period. Delegations from different departments of the CPC Central Committee visited several African countries, including Kenya, Tanzania, Togo, and South Africa. These visits focused on dialogues and site visits to ongoing Chinese initiatives and projects in different African countries.²⁷ On the African side, **African political parties have sent delegations to China for capacity-building and state governance experiences exchange** missions.²⁸ In March 2023, political parties from several African countries, including South Africa, Senegal, South Sudan, Comoros, and Mauritius, participated in the CPC's virtual conference for political parties from across the world under the theme of "Path Towards Modernisation: The Responsibility of Political Parties".²⁹

Exchanges on human rights issues and legal practises have also become more frequent. In April 2024, human rights consultations were held between relevant departments in China, Angola, and Ethiopia respectively.³⁰ In June 2024, a delegation of African Chief Justices visited Beijing and met senior officials of the Party and Supreme People's Court of China.³¹

1.3 China, the African Union, and African sub-regional organisations

There has been increased cooperation between the African Union (AU) and China. The 8th China-AU Strategic Dialogue with the African Union Commission (AUC) Chairperson was held in January 2023³², followed by a meeting between China's Special Envoy for Horn of Africa Affairs and the Deputy Chairperson of the AU Commission in May 2023, focusing on security cooperation in the Horn of Africa.³³ In the same vein, The Chinese Mission to the AU held several meetings with the Secretary-General of the African Continental Free Trade Area (AfCFTA) Secretariat in 2023.³⁴ In June 2023, Secretary-General of the AfCFTA Secretariat and the AUC Commissioner for Economic Development, Trade, Tourism, Industry, and Minerals attended the 3rd China-Africa Economic and Trade Expo (CAETC) in Hunan province. In November, the AU Special Envoy for the Africa Medicines Agency attended the China-AU-UN tripartite framework for action on the local production of medicines and health commodities in Africa.

In April 2024, China's Special Representative for Human Rights of the Ministry of Foreign Affairs held consultations with the Director General of the Conflict Prevention Department of the AU and

²⁶ As exchanges at this level primarily seek to build trust and deepen political engagement at the local level, they do not usually result in concrete agreements, or initiatives.

²⁷ Forum on China-Africa Cooperation, 'Li Bin visits Tanzania', 2023, http://www.focac.org/zfgx/zjzw/202305/t20230518_11079693.htm

²⁸ Xinhua, 'Wang Yi meets with members of the Tanzanian Revolutionary Party National Executive Committee Training Class', 2023, https://www.news.cn/politics/leaders/2023-04/21/c_1129549066.htm

²⁹ People's Daily, 'Xi attends dialogue between CPC, world political parties', 2023, <http://en.people.cn/n3/2023/0318/c90000-10224268.html>

³⁰ Forum on China-Africa Cooperation, 'China and Angola Hold First Consultation on Human Rights', 2024, http://www.focac.org/eng/zfgx_4/zjzw/202404/t20240424_11288165.htm

³¹ Xinhua, 'Chen Wenqing meets with a delegation of African chief justices', 2024, <http://www.news.cn/20240625/ab7cb5db5e594a6a8499215fa784c5bd/c.html>

³² Embassy of the People's Republic of China in Jamaica, 'the 8th China-AU Strategic Dialogue', 2023, http://jm.china-embassy.gov.cn/eng/zgqw/202301/t20230112_11005965.htm

³³ Ministry of Foreign Affairs of the People's Republic of China, 'Special Envoy for the Horn of Africa Affairs of the Ministry of Foreign Affairs Meets with Deputy Chairperson of the African Union Commission', 2023, https://www.mfa.gov.cn/eng/xw/wjbxw/202405/t20240530_11344009.html

³⁴ Mission of the People's Republic of China to the African Union, 'Ambassador Hu Changchun, Head of the Chinese Mission to the African Union, meets with Secretary-General of the African Continental Free Trade Area', 2023, http://au.china-mission.gov.cn/sghd/202306/t20230603_11089347.htm

exchanged views on multilateral human rights cooperation. This marks the 4th human rights consultation between China and the AU.³⁵ In May 2024, China's Head of Mission to the AU met with the AUC Chairperson, with discussions centring on issues relating to the Summit of the Forum on China-Africa Cooperation, cooperation between China and the AU, and so on.³⁶ Throughout the first half of 2024, China's Head of Mission to the AU also met with the AU Commissioner for Political Affairs, Peace and Security (AU-PAPS), Director of the African Centers for Disease Control and Prevention (CDC), and visited the African Export-Import Bank and other AU institutions. In June 2024, the 2nd Horn of Africa Peace Conference Senior Officials' Meeting was held in Beijing.³⁷

1.4 International Cooperation

Cooperation between China and African countries in international affairs in 2023 focused on global governance reform. In September, the African Union was officially admitted to the G20, now G21, as a permanent member, first endorsed by China in 2022 during a FOCAC follow-up meeting.³⁸ In August 2023, President Xi attended side meetings on BRICS-Africa Outreach and BRICS Plus Dialogue during the BRICS leaders' summit in South Africa. Consequently, **Egypt and Ethiopia** were admitted to BRICS.³⁹ Within the UN Security Council, China and Africa voted together most of the time, with the exception of a few occasions, including the extension of the UN Mission in South Sudan (UNMISS)⁴⁰, extension of the mandate of the panel of experts in Sudan⁴¹ and renewal of the arms embargo on the Central African Republic⁴² (China abstained from all three votes).

Similarly, the focus of Africa-China cooperation on international affairs during the first half of 2024 was on reform and Global South initiatives. In January 2024, China's Vice Premier attended the 19th Summit of the Non-Aligned Movement and the 3rd South Summit – the highest-level meeting of the Group of 77+China, held in Kampala, Uganda.⁴³ In June 2024, China's Foreign Minister Wang Yi attended the BRICS Foreign Ministers' Meeting, which was held in Nizhny Novgorod, Russia.⁴⁴

³⁵ Ministry of Foreign Affairs of the People's Republic of China (MOFA), 'China and the African Union hold the fourth human rights consultation', 2024, https://www.mfa.gov.cn/web/wjwb_673085/zjjz_673183/fzs_673445/dqzzhzzjz_673449/fzlm_673521/xgxw_673527/202404/t20240424_11288198.shtml

³⁶ MOFA, 'Head of the Chinese Mission to the AU, meets with the Chairperson of the AU Commission', 2024, https://www.mfa.gov.cn/zwbdt_673032/wshd_673034/202405/t20240529_11313628.shtml

³⁷ Forum on China-Africa Cooperation, 'Mao Ning introduced the Second Horn of Africa Peace Conference Senior Officials Meeting', 2024, http://www.focac.org/zfgx/zjjw/202406/t20240625_11441355.htm

³⁸ China Daily, 'G20 agrees to grant permanent membership to African Union', 2023, <https://global.chinadaily.com.cn/a/202309/09/WS64fc0657a310d2dce4bb4d86.html>

³⁹ Reuters, 'BRICS welcomes new members in push to reshuffle world order', 2023, <https://www.reuters.com/world/brics-poised-invite-new-members-join-bloc-sources-2023-08-24/>

⁴⁰ United Nations, 'Security Council Renews United Nations Mission in South Sudan for One Year, Adopting Resolution 2729 (2024) by Vote of 13 in Favour, 2 Abstentions', 2024, <https://press.un.org/en/2024/sc15687.doc.htm>

⁴¹ United Nations, 'Security Council Extends Mandate of Expert Panel Monitoring Sanctions Regime in Sudan, Adopting Resolution 2725 (2024)', 2024, <https://press.un.org/en/2024/sc15616.doc.htm>

⁴² United Nations, 'Security Council Extends Arms Embargo on Central African Republic, Mandate of Expert Panel, Adopting Resolution 2693 (2023)', 2023, <https://press.un.org/en/2023/sc15369.doc.htm>

⁴³ Xinhua, 'Global South unites for change; Kampala Summit sends a strong message of cooperation', 2024, <http://www.news.cn/world/20240123/0bb2ec064eda42ef844c90565d89f879/c.html>

⁴⁴ Ministry of Foreign Affairs of the People's Republic of China, 'Wang Yi Attends the BRICS Foreign Ministers' Meeting', 2024, https://www.mfa.gov.cn/web/wjwbzhd/202406/t20240610_11416084.shtml

CHAPTER 2 - ECONOMIC COOPERATION

2.1 Debt and Concessional Financing

Key Expectations (e.g. at FOCAC 8):

1. China to provide USD 10 billion in credit line to AFIs to support the development of African SMEs.
2. China will deepen cooperation with regional and sub-regional financial institutions.
3. China welcomes the issuance of panda bonds in the Chinese bond market.
4. The two sides support the RMB offshore market development in Africa.

In November 2021, China pledged to allocate USD 10 billion of its Special Drawing Rights (SDRs) to Africa.⁴⁵ The People's Bank of China (PBoC) has so far said it will allocate some of this through the IMF Poverty Reduction and Growth Trust (PRGT) and the IMF Resilience and Sustainability Trust (RST).⁴⁶ However, it is unclear how much China has allocated to these instruments, and in addition, it is not possible to earmark SDRs for Africa through these funds. Furthermore, African countries have hardly benefitted from these funds relative to other countries to date. As of September 2023, 46.5% of the USD 5.73 billion in Resilience and Sustainability Fund (RSF) arrangements were for African countries- amounting to USD 2.66 billion. The bulk of these funds is held by Morocco at USD 1.31 billion, followed by Kenya and Senegal at USD 535.32 million and USD 319.15 million, respectively. Thus, China's SDR commitment remains outstanding. One key possibility is to direct the SDRs to the African Development Bank (AfDB) (and/or other African banks) that has an existing joint fund with the PBoC (the AfDB has had the USD 10 billion Africa Growing Together Fund since 2014, which is due to be replenished in 2024). The AfDB has also finalised a new instrument to comply with SDR reserve requirements and could therefore be the primary vehicle for the SDRs to reach African countries directly and more swiftly.⁴⁷

The use of the Renminbi in Africa-China financial cooperation continued to grow in 2023. The **China-Africa Yuan Settlement Centre opened in Yiwu in May 2023** with the aim of expanding transactions between China and African countries.⁴⁸ In addition, branches of Chinese banks in African countries have also expanded their RMB offshore services such as Bank of China's branch in Zambia.^{49,50}

By 2023, three African countries had signed currency swaps with China to help deal with liquidity challenges and other inflationary effects, such as those precipitated by the COVID-19 pandemic and as the effect of rising dollar interest rates on forex reserves. These countries were included:

⁴⁵ Embassy of the People's Republic of China in the Republic of Zimbabwe, Forum on China-Africa Cooperation Dakar Action Plan (2022- 2024), http://zw.china-embassy.gov.cn/eng/zgj/202112/t20211216_10470569.htm.

⁴⁶ Embassy of the People's Republic of China in the Republic of Zimbabwe, Forum on China-Africa Cooperation Dakar Action Plan (2022-2024), http://zw.china-embassy.gov.cn/eng/zgj/202112/t20211216_10470569.htm.

⁴⁷ Development Reimagined, 'Options Paper for Channeling China's SDRs to Africa', 2023, <https://findevlab.org/wp-content/uploads/2023/03/DR-FDL-Seminar-Presentation-Slides.pdf>

⁴⁸ Forum on China Africa Cooperation, 'China-Africa yuan settlement center opens', 2023, http://www.focac.org/eng/zfgx_4/jmh/202306/t20230601_11087017.htm

⁴⁹ Belt and Road Portal, 'Bank of China Zambia holds cross-border RMB business promotion meeting', 2023, <https://www.yidaiyilu.gov.cn/p/09QQ69AT.html>.

⁵⁰ Bloomberg, 'Bank of China Will Use Zambia Unit to Boost Renminbi Trade Clout', 2023, <https://www.bloomberg.com/news/articles/2023-12-05/bank-of-china-will-use-zambia-unit-to-boost-renminbi-trade-clout>

- South Africa (signed initially in April 2015 and extended in 2018, worth RMB 30 billion (US\$4.6bn at the time)⁵¹
- Egypt (signed initially in December 2016, extended in February 2020, and was valued at RMB 18 billion (US\$2.6bn at the time)⁵²
- Nigeria (signed in April 2018, valued at RMB 15 billion (US\$2.3bn at the time)⁵³
- There was also reported progress towards a currency swap with Zimbabwe⁵⁴

In October 2023, Egypt became the first African country to issue a ‘panda bond’, the proceeds of which will be allocated to inclusive growth and green objectives under its Sovereign Sustainable Financing Framework. It was also the first African country to issue securities in the Chinese interbank market. The bond was worth RMB 3.5 billion (approx. USD 480 million), priced at a 3.51% interest rate (much lower than Africa’s recent Eurobonds), and is expected to mature in 2026. It was jointly guaranteed by AIIB and AfDB.

2023 also saw growing cooperation between African and Chinese Multilateral Development Banks (MDBs). Notably, the Asian Infrastructure Investment Bank (AIIB) and the AfDB expressed their intention to collaborate on connectivity projects in Africa.⁵⁵ The two banks also collaborated to provide guarantees for the issuance of Africa’s first Panda Bond issued by Egypt in 2023 **at a value of more than RMB 3 billion.**⁵⁶ In addition, **Chinese and African financial institutions have worked together to establish specific financial support for different African stakeholders.** The Industrial and Commercial Bank of China (ICBC), for example, partnered with the Standard Bank Group in South Africa to provide dedicated financing support for Telekom—a telecommunication company in South Africa.⁵⁷ Meanwhile, the China Development Bank (CDB) and the African Export-Import Bank (Afrexim) signed a special loan agreement for African SMEs.⁵⁸

In August 2022, China announced that it would waive 23 interest-free loans to 17 African countries⁵⁹, managed by MOFCOM, China’s Ministry of Commerce.⁶⁰ When it comes to debt relief/restructuring on loans from China Exim Bank, these require a government-to-government agreement.⁶¹ This is the first step as other processes within the China Exim Bank follow. Loans

⁵¹ ACCA, 2019, <https://www.accaglobal.com/africa/en/member/member/accounting-business/2019/07-08/in-focus/okey-jul19.html%20--use-spdy=off%20--disable-http2.html>

⁵² Central Bank of Egypt, <https://www.cbe.org.eg/en/Pages/HighlightsPages/Press-Release-The-Central-Bank-of-Egypt-and-the-People's-Bank-of-China-enter-into-a-bilateral-currency-swap.aspx>

⁵³ AllAfrica, ‘Nigeria-China N720bn Currency Swap Deal On Slow Pace 3 Years After’, 2021, <https://allafrica.com/stories/202104260050.html>

⁵⁴ Business Day, ‘Zimbabwe and China sign currency swap deal’, 2020, <https://www.businesslive.co.za/bd/world/africa/2020-01-15-zimbabwe-and-china-sign-currency-swap-deal/>

⁵⁵ Multilateral Cooperation Center for Development Finance, ‘AfDB-MCDF-AIIB Workshop Spotlights Connectivity Infrastructure Delivery Pathways in Africa’, 2023, <https://www.themcdf.org/en/news-activities/news/2023/AFDB-MCDF-AIIB-Workshop-Spotlights-Connectivity-Infrastructure-Delivery-Pathways-in-Africa.html>

⁵⁶ Asian Infrastructure Investment Bank (AIIB), ‘AIIB, AfDB Guarantee Africa’s First Sustainable Panda Bond’, 2023, <https://www.aiib.org/en/news-events/news/2023/AIIB-AfDB-Guarantee-Africa-s-First-Sustainable-Panda-Bond.html>

⁵⁷ Standard Bank Group (Beijing), ‘Standard Bank and ICBC jointly provide financing for Telkom’, 2023, https://mp.weixin.qq.com/s/NWDNq7TZQ_IZUCgf9XCYdw

⁵⁸ Xinhua, ‘China Development Bank and African Export-Import Bank sign special loan agreement for African SMEs’, 2023, http://www.news.cn/world/2023-08/28/c_1129829869.htm

⁵⁹ BU Global Development Policy Center, ‘China’s Interest-Free Loans to Africa: Uses and Cancellations’, 2022, <https://www.bu.edu/gdp/2022/09/09/chinas-interest-free-loans-to-africa-uses-and-cancellations/>

⁶⁰ BU Global Development Policy Center, ‘China’s Interest-Free Loans to Africa’, 2022, https://www.bu.edu/gdp/files/2022/09/GCI_PB_015_FIN.pdf

⁶¹ CABRI, ‘China’s approach to sovereign lending and debt restructuring: A primer for African public debt managers’, 2021, <https://www.cabri-sbo.org/uploads/files/Documents/China-approach-to-sovereign-lending-and-debt-restructuring-A-primer-for-African-public-debt-managers.pdf>

from CDB and other banks do not require such an agreement, however, such negotiations can be affected by commercial conditions. There is no update on China's loan to African states in 2023. According to DR's work, at least 30 projects were financed by China from January 2023 to June 2024 in various ways, including loans and investments, mainly from the Export-Import Bank of China and Chinese state-owned corporations. In addition, at least 30 aid projects were conducted during the same period, including drilling wells, building hospitals and schools, and donating supplies conducted by stakeholders from both public and private sectors.

With China finally opening up post-pandemic **and linked to its decision to seek debt relief support under the G20 Common Framework in 2021, Zambian Treasury and Central Bank officials** travelled to China **in early 2023** prior to the IMF and World Bank spring meetings. Their proposals paved the way for a breakthrough deal for all bilateral creditors to extend repayments of USD 6.3 billion in loans to 20 years with a three-year grace period.⁶² **Ghana** also sought debt relief from China in 2023 under the same framework, and is currently negotiating an MOU with a range of creditors. In August 2023, China announced a decision to suspend Ethiopia's payments on debt maturing in the 2023/24 fiscal year, which ran until July 7, 2024.⁶³

At the end of 2021, **China pledged to provide USD 10 billion in trade finance and USD 10 billion to support African SMEs in the coming three years.** By August 2022, over USD 2 billion had been allocated for trade finance and almost USD 3 billion had been allocated for SMEs.⁶⁴ In September 2023, the Africa Finance Corporation (AFC) obtained a USD 300 million trade finance loan from the Export-Import Bank of China.⁶⁵ In August 2023, the China Development Bank (CDB) and the African Export-Import Bank signed a USD 400 million term loan facility.⁶⁶ This funding is intended for African SMEs engaged in intra-African trade and productive sectors in Africa. In February 2024, the China Development Bank fully disbursed USD 300 million in loans to support SME development in Egypt, aiming to support more than 9,100 SMEs in 29 sectors, including food processing, education and training, and auto parts manufacturing, benefiting about 60,000 local employees.

⁶² The Diplomat, 'China and Zambia: A New Chapter Beyond Debt?', 2023, <https://thediplomat.com/2023/09/china-and-zambia-a-new-chapter-beyond-debt/>

⁶³ Reuters, 'Ethiopia's new debt-service suspension to mirror China deal - finance ministry', 2023, <https://www.reuters.com/world/africa/ethiopias-new-debt-service-suspension-mirror-china-deal-finance-ministry-2023-11-16/>

⁶⁴ Ministry of Foreign Affairs of the People's Republic of China, Remarks by State Councillor Wang Yi, 2022, https://www.fmprc.gov.cn/eng/wjzb_663304/wjzbz_663308/2461_663310/202208/t20220819_10745617.html

⁶⁵ Africa Finance Corporation (AFC), 'AFC secures USD 300 Million Loan from the Export-Import Bank of China to boost trade finance in Africa', <https://www.africafc.org/news-and-insights/news/afc-secures-us-300-million-loan-from-the-export-import-bank-of-china-to-boost-trade-finance-in-africa>

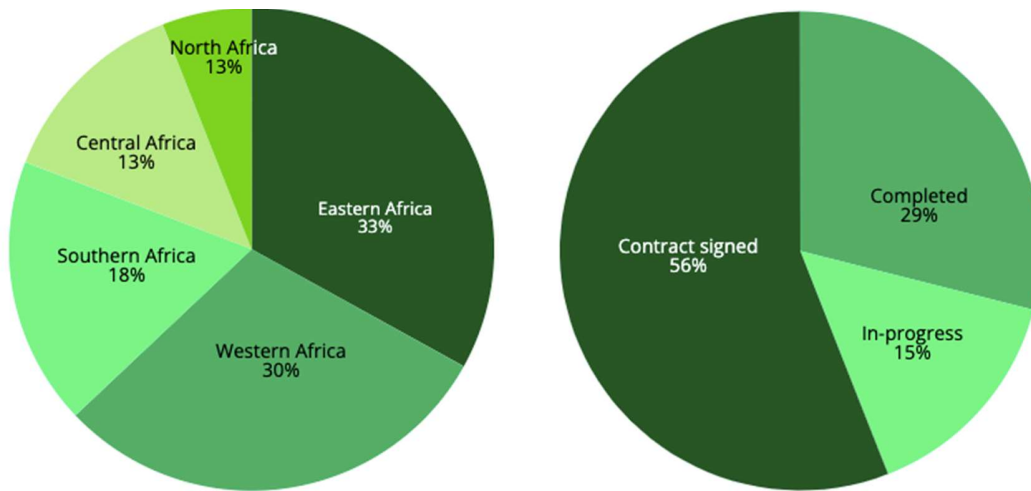
⁶⁶ Ministry of Commerce of the People's Republic of China (MOFCOM), 'Afreximbank and China Development Bank Sign USD 400m Loan to Support African SMEs', 2023, <http://cv.mofcom.gov.cn/article/jmxw/202308/20230803436560.shtml>

2.2 Infrastructure Development

Key Expectations (e.g. at FOCAC 8):

1. Align China-Africa infrastructure cooperation with PIDA-PAPII and PICI
2. Complete 10 connectivity assistance projects
3. Promote sustainable development standards for BRI projects in Africa
4. Encourage Chinese enterprises to use PPPs, trilateral and multilateral cooperation and joint ventures with African firms, employ local workers and use local materials for connectivity projects

Figure 2: Regional Distribution and Projects Status of Infrastructure Projects in 2023



Africa remained the second-largest market for China's foreign contracted projects in 2023.⁶⁷ In 2022, new contracts signed by Chinese companies in Africa amounted to USD 73 billion, a 6% year-on-year decrease from 2021. Transportation construction, general construction, and power engineering construction account for 63% of the completed project contracting turnover and 59% of the total value of new contracts.⁶⁸ Many of the infrastructure projects financed by all partners in 2023 were primarily focused on **connectivity within the country rather than cross-country/regional connectivity.**

In the first two quarters of 2024, the distribution of the status of recorded infrastructure projects remains similar compared to 2023. 55% of all 171 projects are new, 27% were completed and 18% are still in progress.

⁶⁷ Report on Economic and Trade Relations between China and Africa by the Research Institute of MOFCOM 2023

⁶⁸ FOCAC, 'The Research Institute of the Ministry of Commerce releases the Report on Economic and Trade Relations between China and Africa (2023)', 2023, http://www.focac.org/zfgx/jmhzh/202307/t20230706_11109378.htm

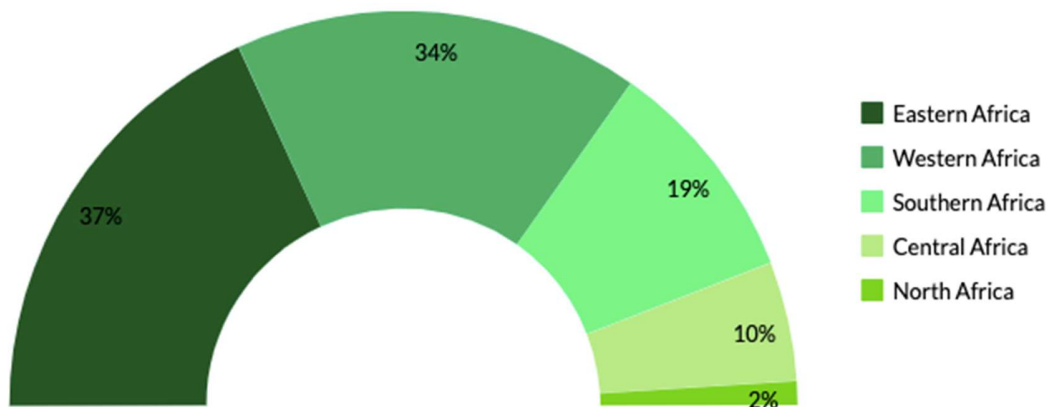
2.2.1 ROADS AND BRIDGES

In 2023, the transportation sector remained pivotal in Africa-China cooperation, with 105 out of 229 infrastructure projects dedicated to constructing or upgrading roads and bridges. In 2023, there were over 30 ongoing highway and expressway projects under Africa-China infrastructure cooperation, such as the Ngongo-Kimpangu road project that will link DR Congo with Angola and the Tiébissou-Bouaké highway in Cote d'Ivoire, linking landlocked West Africa to the port of Abidjan. These projects were funded by the China Exim Bank and with Chinese SOEs as regular bidders. Cooperation in this sector is also expanding with the increasing adoption of Bus Rapid Transport projects across the continent, such as in Mauritius, Senegal, and Tanzania.

In the first half of 2024, we recorded 53 projects related to roads and bridges under China-Africa cooperation. Nearly a half (49%) of the recorded projects were new. Of the remaining projects, half are still in progress, while the other half have been completed.

At the regional level, Eastern Africa saw the largest number of projects undertaken (21) with Western Africa coming in second at 15.

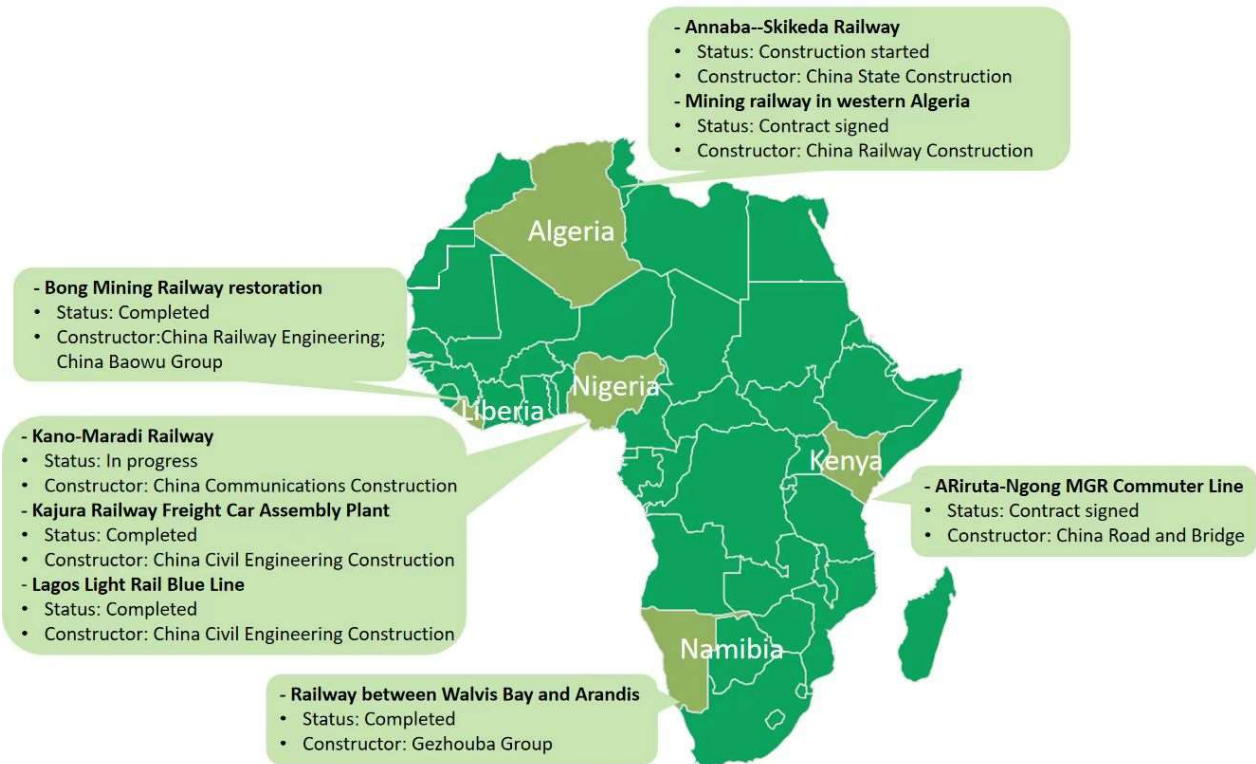
Figure 3: Regional Distribution of Roads and Bridges Projects in 2023



2.2.2 RAILWAYS

Eight railway projects were undertaken under the FOCAC framework in 2023, including both meter gauge and standard gauge railways, as well as passenger and commercial railways.

Figure 4: Railway Projects in Africa in 2023



According to publicly available information, the projects listed above were **not undertaken** with Chinese financing, however, Chinese design and Chinese railway specifications and standards have been deeply integrated into the project implementation process.

So far in 2024, 10 railway projects have been recorded, marking an increase in this field, with two of them being related to the signalling and operation management of railways. It is worth noting that 5 out of these 10 projects are new ones, covering Nigeria, Kenya, Tanzania, and Guinea.

2.2.3 AIRPORTS AND PORTS

Since January 2023, Chinese companies and banks have been involved in eight African airport projects, according to publicly available information. **China and African countries have also cooperated on several port projects.** The China Development Bank extended a commercial loan of USD 629 million⁶⁹ for the construction of the Lekki deep-water port in Nigeria, which follows

⁶⁹ Xinhua News, 'China Development Bank supports Nigeria's Lekki Port', 2019, <http://www.xinhuanet.com/money/20230210/d54933ae81b64063bf561e5f56b6b71f/c.html>

the port build-own-operate-transfer (BOOT) model.⁷⁰ With funding from the Export-Import Bank of China, the second phase of the Kribi deep-water port project in Cameroon is underway.^{71,72}

Table 2: African Airport Projects Engaged with Chinese Stakeholders from January 2023 to June 2024

Project Name	Country	Funding source	Investment amount
The Upgrade of Sumbawanga Airport	Tanzania	Tanzania Government	USD 21 million ⁷³
New terminal at Kano Int'l Airport	Nigeria	Export-Import Bank of China	CEXIM provided 85% preferential loans ⁷⁴
Nguru Airport in Yobe State conducted a test flight	Nigeria	Nigeria Government	(*exact amount unknown)
Airport terminal extension at Robert Gabriel Mugabe International Airport	Zimbabwe	Export-Import Bank of China	USD 37 million ⁷⁵
Dr. António Agostinho Neto Int'l Airport	Angola	Angola Government	USD 3 billion ⁷⁶
Kasama Airport ⁷⁷	Zambia	Zambia Airports Corporation, Gov't.	(*exact amount unknown)
Ethiopia Bole International Airport Parking Apron Expansion Project ⁷⁸	Ethiopia	Information unavailable	(*exact amount unknown)
Ethiopia Bole International Airport inaugurated a Chinese-built domestic passenger terminal ⁷⁹	Ethiopia	Export-Import Bank of China	USD 50 million for this terminal specifically ⁸⁰

2.2.4 HOUSING AND GENERAL CONSTRUCTION

In 2023, Chinese enterprises undertook 52 housing and/or general construction projects in different African countries. For instance, in June 2023, China and Egypt established a joint

⁷⁰ Xinhua News, 'China Development Bank supports the opening and operation of Nigeria's Lekki Port', 2023, <http://www.xinhuanet.com/money/20230210/d54933ae81b64063bf561e5f56b6b71f/c.html>

⁷¹ Belt and Road Portal, 'Cameroon's Kribi deep-water port project financed by the Export-Import Bank of China has boosted customs revenue in the southern Cameroon region significantly', 2022, <https://www.yidaiyilu.gov.cn/p/235413.html>

⁷² The first phase, also funded by China, has led to a significant boost in the annual customs revenue of the Southern Cameroon Region. Between 2018 and 2021, this revenue increased tenfold, and yielded a total revenue of USD 500 million over four years.

⁷³ Seetao, 'Tanzania airport upgrade plan released', 2023, <https://www.seetao.com/details/45533.html>

⁷⁴ Cri.cn, 'China vigorously promotes the modernization of Nigeria's aviation infrastructure', 2023, <https://baijiahao.baidu.com/s?id=1620512608289815578&wfr=spider&for=pc>

⁷⁵ Seetao, 'The Export-Import Bank of China supports Zimbabwe's infrastructure construction', 2023, <https://www.seetao.com/details/101449.html>

⁷⁶ Simple Flying, 'Angola Opens New USD 3 Billion Luanda International Airport', 2023, <https://simpleflying.com/angola-opens-new-luanda-international-airport/>

⁷⁷ Chinese Embassy in Zambia, 'Ambassador Du Accompanies President Hakainde Hichilema to Attend the Official Commissioning Ceremony of the Kasama Airport', 2023, http://zm.china-embassy.gov.cn/eng/dshdyjh/202311/t20231128_11188587.htm

⁷⁸ China International Contractors Association, 'China Communications Construction Company Wins Bid for Ethiopia Bole International Airport Apron Expansion Project', 2024, <https://www.chinca.org/CICA/info/24040208465411>

⁷⁹ People's Daily Online, 'Ethiopian Airlines Inaugurates Chinese-built terminal, doubling passenger capacity', 2024, <http://en.people.cn/n3/2024/0520/c90000-20171723.html>

⁸⁰ AIDDATA, Project ID: 30915. <https://china.aiddata.org/projects/30915/>

venture for the construction of Egypt's new capital CBD project, which spans approximately 550,000 square metres and boasts a total construction area of 2 million square metres. Another noteworthy project is the ANP project situated in Awash National Park, Ethiopia, constructed by a Chinese company, which aims to establish a high-end ecotourism attraction with local cultural preservation. Meanwhile, 18 housing-related projects have been identified during the first six months in 2024.

2.2.5 OTHER INFRASTRUCTURE

Several Chinese companies have been active in ICT infrastructure projects (optical fibres, backbone telecommunications networks, mobile phone networks, data centres, and related services). For instance, Huawei collaborated with MTN Zambia to pilot 5G technology. Huawei was also involved in the construction of the Kano National Tier IV Data Centre in Nigeria and the Huawei Angola Technology Park. From a regional perspective, the major transnational interconnection project related to the development of the ICT sector in 2023 is the participation of China Power in the construction of Tanzania-Zambia Power Grid Interconnection Project.

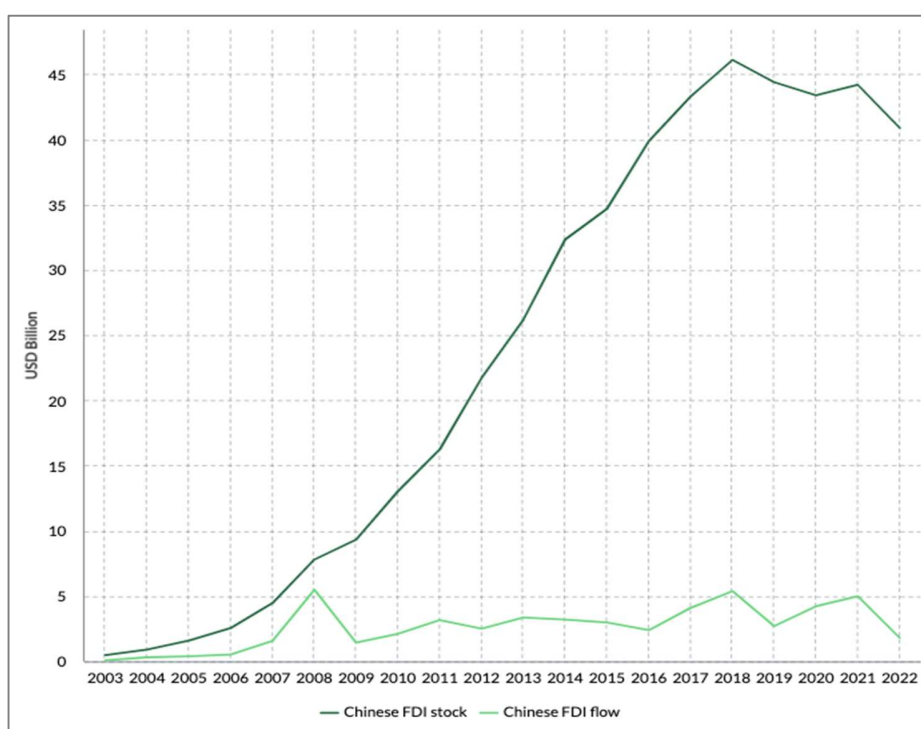
Notably, it is difficult to ascertain whether any of the connection infrastructure projects can be classified under PIDA – the AU's flagship infrastructure programme, as China has not announced any major participation in any specific PIDA project. Overall, Chinese enterprises' engagement with PIDA projects remains severely limited. Nonetheless, some of the transport infrastructure projects undertaken in the last two years have contributed to cross-border connectivity in different regions of the continent, such as the Kano-Maradi railway that links Nigeria to Niger.

2.3 Foreign Direct Investment (FDI)

Chinese FDI in Africa rebounded in 2023, reaching 2022 levels of approximately USD 2 billion by the middle of the year. In 2022, Chinese FDI into Africa fell from USD 5 billion in 2021 to just below USD 2 billion. This accounted for just 1% of China's overall outward direct investment flows in 2022 and just 4% of Africa's total FDI inflows. At the end of 2021, China encouraged Chinese businesses to invest at least USD 10 billion in Africa by 2024. According to publicly available information, approximately 18% of this pledge was fulfilled by the end of 2022.

The stock of Chinese FDI declined to USD 40 billion in 2022 from USD 44 billion in 2021, representing a 7% decrease (Figure 5).⁸¹ By the end of 2022, Chinese FDI stock in Africa constituted less than 2% of China’s total outbound investment stock. The number of Chinese enterprises in Africa reached 3,323, accounting for 7% of Chinese overseas enterprises.⁸² China had the 5th largest FDI stocks in Africa in 2021 (USD 44bn), after the UK (USD 60bn), France (USD 54bn), Netherlands (USD 54bn) and the U.S. (USD 45bn).⁸³

Figure 5: Trends of Chinese FDI in Africa (2003-2022)



Chinese investment covers 52 African countries. The top five African countries for China’s direct investment were South Africa, the Democratic Republic of the Congo, Ethiopia, Nigeria, and Zambia (Figure 6). By the end of 2022, the top 10 countries collectively accounted for 63% of China’s direct investment stock on the continent.

Overall, the share of FDI stock in construction has seen a slight increase, whereas in mining, it has slightly decreased, and in manufacturing, it has remained relatively stable over the period from 2013 to 2022. There has been no clear diversification trend in terms of FDI stock observed over the last decade (2013-2022).

⁸¹ MOFCOM, ‘Statistical Bulletin of China’s Outward Foreign Direct Investment 2022’.

⁸² MOFCOM, ‘Statistical Bulletin of China’s Outward Foreign Direct Investment 2022’.

⁸³ UNCTAD, ‘World Investment Report 2023 – Regional Trend: Africa’, 2023, https://unctad.org/system/files/non-official-document/wir2023-regional_trends_africa_en.pdf

Although full data on Chinese FDI in Africa in 2023 is not yet available, based on our data so far, we predict an increase in FDI flows in 2023, rebounding to 2021 levels. We also predict that Chinese FDI in mining will rise with new projects in mineral exploration, extraction, and processing in several mineral-rich countries across the continent.

Figure 6: Top 10 African Countries with the Largest Share of Chinese FDI Stock (2022)

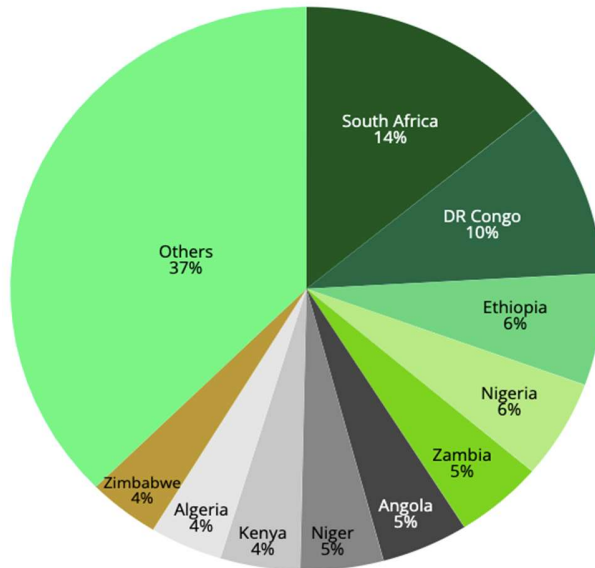
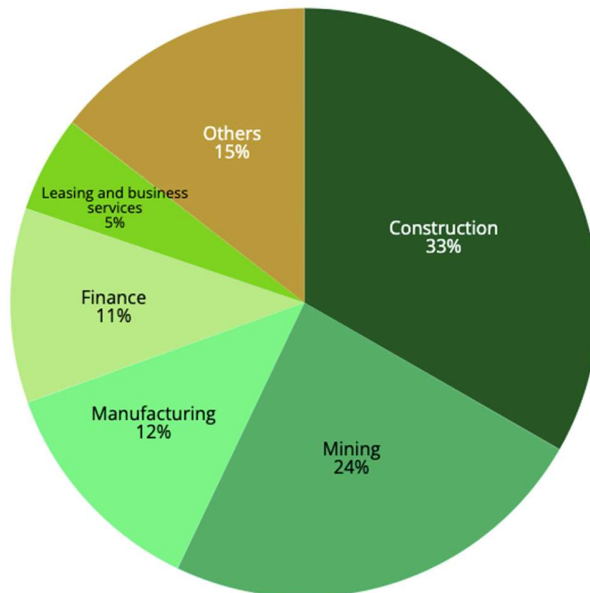


Figure 7: Share of China's direct investment in Africa by industry (2022)



2.4 Industrial Partnership and Production Capacity Cooperation

Key Expectations (e.g. at FOCAC 8):

1. Improve investment and cooperation mechanisms, reduce investment barriers and upgrade bilateral investment treaties.
2. China to encourage its businesses to invest no less than USD 10 bn in Africa through 2024 focusing on manufacturing, agriculture, green economy and digital economy.
3. Establish a platform for China-African private investment promotion in logistics and manufacturing within new and existing FTZs, industrial parks, green industrial parks.
4. China will publish the Report on Chinese Investment in Africa on a regular basis.
5. China will undertake 10 industrialisation and employment assistance projects in Africa.
6. Support Chinese enterprises in increasing diversification of investment in emerging sectors.
7. Support expansion of industrial chains in the mining industry and increase investment in upstream sectors of the industry.
8. Support upgrading of economic cooperation zones to demonstration areas for industrial cooperation.

China's FDI stock in the mining sector stood at USD 10 billion, accounting for 24% of Chinese FDI stock in Africa by the end of 2022. According to CAITEC, the smelting of mineral resources has become the focus of Chinese investment in Africa in recent years.⁸⁴ For instance, the Dinson Iron and Steel project—which began construction in 2022 and recognised as Africa's largest steel plant—is invested and constructed by Dinson Iron and Steel Company, a subsidiary of China Tsingshan Holding Group, in Zimbabwe.⁸⁵ Table 3 records 12 Chinese-invested mining projects in Africa in 2023. DR Congo and Zimbabwe have those projects while Western Africa and Southern Africa are the two most popular regional destinations. In the first half of 2024, Chinese enterprises continued their active participation in the African mining sector by attending the 2024 African Mining Investment Conference.⁸⁶ Meanwhile, Chinese companies have engaged in mining projects in South Africa (lithium iron phosphate mine), Botswana (copper mine), Sierra Leone (iron mine), Eritrea (copper and gold polymetallic mine, potash fertiliser mine), and Democratic Republic of Congo (copper and cobalt mine).

⁸⁴ CAITEC, 'China-Africa Economic and Trade Relationship Report 2023'.

⁸⁵ CAITEC, 'China-Africa Economic and Trade Relationship Report 2023'.

⁸⁶ Belt and Road Portal, 'Chinese companies seek new opportunities for cooperation at the African Mining Investment Conference', 2024, <https://www.yidaiyilu.gov.cn/p/05EEEP3U.html>

Table 3: Chinese-invested mining projects in Africa (2023)

Project	Host Country	Chinese Entities
MMG Kinsevere Expansion Project	DR Congo	China Nonferrous Metal Mining Group
Zambia United Capital Coal-made Urea Project	Zambia	China National Chemical Engineering
Minmetals Resources KEP project	DR Congo	China Metallurgical Group Corporation
Nigeria OSOSO Mine operation and maintenance project and EDO3 line heavy oil system EPC project	Nigeria	CBMI
DRC Kinseyville Expansion Project	DR Congo	CHINALCO
Bomi Iron Mine Mining and stripping project	Liberia	Power China Sinohydro Bureau 14 CO., LTD
Wesabi Star Lithium Mine Reservoir Project	Zimbabwe	China Jiangxi International Group
Huayou Lithium Mine No. 2 crushing production line project	Zimbabwe	China Jiangxi International Group
East African Crude Oil Pipeline Project	Uganda, Tanzania	China Petroleum Pipeline Bureau
The second phase of the upstream and downstream integration project of the Agadem oil field	Niger	China National Petroleum Corporation
Heavy Oil Power Station of Leone Rock Metals and Rehabilitation of the railway and Pepel port	Sierra Leone	Leone Rock
Maintenance project of CGNPC Namibia's Husab uranium mine captive power plant	Namibia	China General Nuclear Power Corporation

By the end of 2022, Chinese FDI stock in the manufacturing sector had reached USD 5 billion, accounting for 12% of China's total FDI stock in Africa. There are signs of nascent diversification of Chinese investment in manufacturing beyond labour-intensive low-technology sectors, such as automobile, pharmaceutical, and chemical industries. Examples include the NIODIOR Group in Angola (motorcycle production), Humanwell Pharmaceuticals in Ethiopia and Mali and the Algerian Chinese Fertilisers Company.⁸⁷ Table 4 records 18 Chinese-invested manufacturing projects in Africa in 2023, with almost 50% of them in the cement industry. While Eastern Africa leads in attracting Chinese manufacturing investment, Nigeria, Egypt, Uganda, Ethiopia, Mozambique and South Africa are top country destinations.

⁸⁷ CAITEC, 'China-Africa Economic and Trade Relationship Report 2023'.

Table 4: Chinese invested manufacturing projects (2023)

Project	Country	Chinese Entities
Cement plant at Itori in Ogun state	Nigeria	Sinoma International
Ammonium nitrate supply spot exchange project	Tanzania	China Energy Engineering Co. (CEEC)
Fish processing unit in Guinea-Bissau	Guinea-Bissau	Zhongyu Global Seafood Corporation
Haier plant in Egypt	Egypt	Haier
Cement plant with Huawei's 5G technology	Uganda	Huawei
Strategic Framework Agreement between Berenta Cement and China National Building Materials Group	Ethiopia	China National Building Material (CNBM)
Cement plant of China-Africa Building Materials Niger Company	Niger	China-Africa Building Materials Niger Company
Cement factory in Southern Province	Rwanda	AnJia Prefabricated Construction Rwanda Company Ltd, a subsidiary of West China Cement (WCC)
Mozambique Nampula Cement Plant Project	Mozambique	China Railway 20th Bureau
Reconstruction and expansion project of Nacala Cement Plant in Mozambique	Mozambique	Jiangxi International
Operation and maintenance of EDO 3 and SOKOTO 4 cement production lines	Nigeria	Sinoma Construction
Fertilizer complex in Ain Sokhna district, Egypt	Egypt	China's Wuhuan Engineering Co.
Hengda Steel Factory in Thaba Nchu, Free State	South Africa	Jiangxi Hengda Iron&Steel Co.LTD
Congo (DRC) sapphire ceramic tile factory	DR Congo	Weihai International
Cement production plant in Moroto District, Uganda	Uganda	China Railway Group Limited
Ethiopia's Beres No. 1 Sugar Factory Extension	Ethiopia	CAMCE
South Africa sulfuric acid titanium dioxide EPC project	South Africa	Donghua Technology, under China National Chemical Engineering
Renovation project of Xinjie'an Automotive Electronics Morocco's production base	Morocco	China Overseas Engineering Group

According to China's Ministry of Commerce, by mid-2023, the total number of Chinese-funded parks in Africa reached 25, attracting more than 620 enterprises with a cumulative investment of USD 7 billion and employing 42,000 local employees.⁸⁸ A number of industry clusters have been taking shape based on these industrial parks, such as mining and resources, equipment manufacturing, light industry and textiles, and household electrical appliances.⁸⁹ However, there is no publicly available information on Chinese enterprises that have set up factories in Africa to export to China.

China has cooperated with African countries to organise exhibitions and co-host investment promotion conferences with Chinese local governments, reviving a growing trend from the pre-pandemic era. For instance, 2024 witnessed the first China (Qingdao)-Africa Economic and Trade Cooperation Promotion Conference.⁹⁰ In 2023, the China-Tanzania Investment Forum and Zhejiang (Jinhua)-Tanzania Trade and Investment Promotion Conference were held in Dar es Salaam. The Tanzania Private Enterprise Association invited nearly 200 local enterprise representatives to have face-to-face negotiations with visiting Jinhua entrepreneurs according to prior demand matching to establish long-term cooperation with the local government and companies. African governments continue to use the opportunities presented at the China Africa Economic and Trade Expo (CAETE) and the China International Imports Expo (CIIE) to promote investment.⁹¹ In 2022, the All-China Federation of Industry and Commerce (ACFIC) established a platform for China-Africa private investment promotion to encourage the active participation of private enterprises in China-Africa investment cooperation. Chinese-invested industrial parks have created conducive environments for manufacturing activities that foster economic diversification and create job opportunities. New industrial park projects undertaken in 2023 and the first half of 2024 include:

- **Côte d'Ivoire:** China Road and Bridge Co. and the Côte d'Ivoire government signed the Framework Agreement for the Bouaké Industrial Park Project to develop Bouaké in to a comprehensive industrial hub and the logistics centre for landlocked countries in West Africa.
- **Uganda:** 16 new factories (in sectors such as textile, electric cables, electric metres, clothes, LED lights) were set up shop in the Sino-Uganda Mbale Industrial Park, and the infrastructure development of the park was launched in August 2023.
- **Cameroon:** China Harbour and Kribi Port Authority of Cameroon signed a framework agreement on investment and cooperation in Kribi Logistics Park, which is adjacent to Kribi Deep Water Port, to serve the logistics distribution of the industrial zone behind the port.
- **Senegal:** The second phase of the Diamniadio International Industrial Park in Senegal, built by Chinese enterprises and supported by a preferential foreign aid loan provided by the Export-Import Bank of China, has been completed. The park aims to catalyse value addition in Senegal and neighbouring countries with a focus on food processing, textiles, and clothing, electromechanical processing, electronic appliances, pharmaceutical chemicals, and service industries, and an expectation to create more than 23,000 jobs.

⁸⁸ People's Government of Hunan Province, 'Chinese enterprises invested in 25 industrial parks in Africa, with more than 620 enterprises in the parks', 2023, https://www.hunan.gov.cn/hnszf/hnyw/zwdt/202307/t20230701_29389428.html

⁸⁹ People's Government of Hunan Province, 'Chinese enterprises have invested in 25 industrial parks in Africa, with more than 620 enterprises in the parks', 2023, https://www.hunan.gov.cn/hnszf/hnyw/zwdt/202307/t20230701_29389428.html

⁹⁰ China-Africa Economic and Trade Expo, 'The First China (Qingdao)-Africa Economic and Trade Cooperation Promotion Conference', 2024, <https://mp.weixin.qq.com/s/mzt15af1xllzub0r5HB6g>

⁹¹ Development Reimagined, 'Does the China-Africa Trade Expo Matter?', 2023, <https://thediplomat.com/2023/06/does-the-china-africa-trade-expo-matter/>

Additionally, during the China-Africa Economic and Trade Expo (CAETE) hosted in Changsha in July 2023, a Promotion and Matchmaking Conference for industrial parks in Africa (similar to previous editions) was convened for both African and Chinese stakeholders to share experiences and best-practises in managing industrial parks and to enhance the synergy between investment and the AfCFTA.

2.5 Digital Economy and E-commerce

Key Expectations (e.g. at FOCAC 8):

1. China will undertake 10 digital economy assistance projects for Africa
2. Jointly formulate and implement the China-Africa Digital Innovation Partnership Program
3. Hold online shopping festivals featuring quality African products
4. Launch a campaign to market 100 African stores and 1000 African products on e-commerce platforms

Different e-commerce platforms, particularly those dedicated to agro-products from Africa, have emerged in China to simplify the process for exporting African agro-products to China and create more demand for African products through shopping festivals and promotions. For instance, the official e-commerce platform for the China-Africa Economic and Trade Expo (CAETE) was designed to facilitate more targeted deals and sales between African businesses and Chinese buyers and consumers both throughout and outside the CAETE period.⁹² The platform is supported by the Hunan Gaoqiao Grand Market, which works with the Hunan local government and Chinese customs agencies to ease the import process for African agro-products, which are sold both online and offline. Furthermore, in January 2024, the leading Chinese e-commerce platform Pinduoduo (PDD) launched its first service in South Africa, the Temu, offering new opportunities for Africa-China e-commerce cooperation.⁹³

All existing e-commerce platforms in 2022 participated in the MOFCOM-led “4th Brand and Quality Online Shopping Festival and Quality African Products Online Shopping Festival,” where more than 100,000 African brands were showcased on over 300 Chinese e-commerce platforms through livestreams and promotional events.⁹⁴ These e-commerce platforms in conjunction with FTZs have eased the import process for African agro-products, connecting African exporters to Chinese buyers, and providing a sales channel for African brands in the Chinese market. They have also helped boost the demand for African agro-products, such as South African wine and Ethiopian, Rwandan and Kenyan roasted coffee. However, more efforts on how to boost traffic and sales on e-commerce platforms in addition to shopping festivals can benefit the development of e-commerce.

⁹² The CAETE is a biennial event, jointly sponsored by the Ministry of Commerce (MOFCOM) of China and the People's Government of Hunan Province and is considered one of the most important platforms for economic and trade cooperation under FOCAC.

⁹³ African Business, 'Chinese E-commerce Giant PDD Heads to Africa', 2024, <https://african.business/2024/04/technology-information/chinas-low-cost-e-commerce-giant-pdd-heads-to-africa>

⁹⁴ Development Reimagined, 'Policy Brief: FOCAC 8 at 1', <https://developmentreimagined.com/introduction-focac-8-at-1-what-has-changed-a-look-at-trade-facilitation-initiatives/>

2.6 Trade and Trade Financing

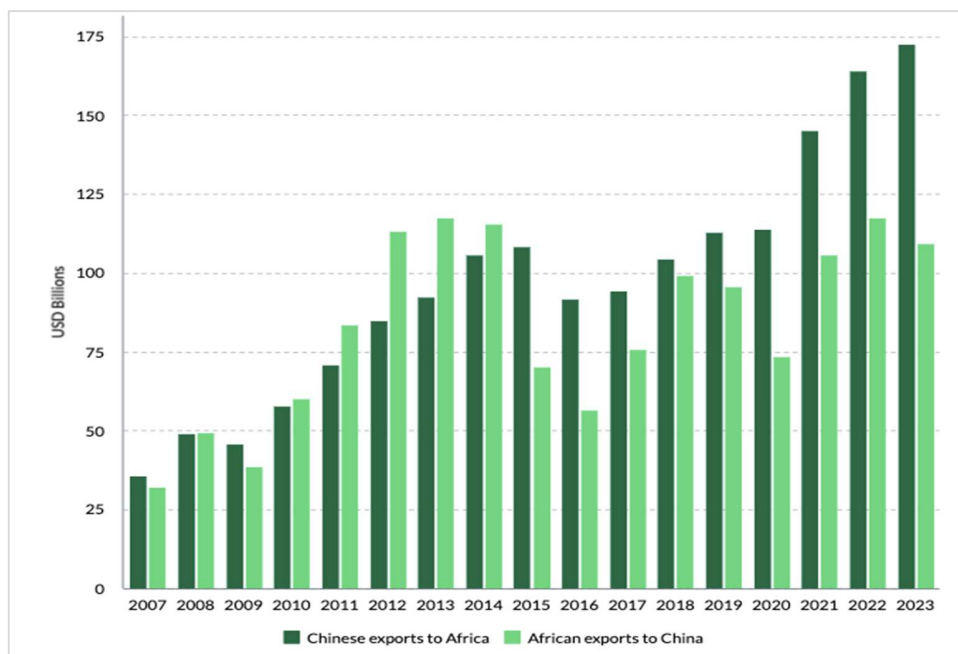
Key Expectations (e.g. at FOCAC 8):

1. Support African countries in promoting African products such as international trade expos in China
2. China to provide USD 10 billion of trade finance to support African exports
3. China will expand the scope of duty-free products from LDCs with diplomatic relations with China
4. Promote China-Africa trade in a bid to reach USD 300 billion in total imports from Africa over 3 years

In 2023, **Africa-China trade in goods reached a new high of USD 282 billion**, slightly higher than in 2022 (Figure 8).^{95,96} China has been Africa’s largest bilateral trade partner for 15 consecutive years.

Yet, **Africa’s trade deficit with China increased from USD 47 billion in 2022 to USD 64 billion in 2023**. Since 2015, Africa has registered a growing trade deficit with China. In 2022, 37 African countries reported trade deficits with China. Nigeria, Egypt, Kenya, Liberia, and Tanzania had the largest trade deficits. Demand for Chinese products in Africa is increasing, and the value of Chinese products, with 2023 showing an increase of about 8% from 2022.⁹⁷

Figure 6: Africa-China Trade Trends (2007-2023)



⁹⁵ Otherwise stated, trade data used in this analysis is retrieved from World Integrated Trade Solution (WITS).

⁹⁶ Trade data for 2023 is accessed from the GACC, PRC, <http://english.customs.gov.cn/Statics/e1351568-5e17-4534-affd-c369e3506613.html>

⁹⁷ The categorization of goods follows UNCTAD-SoP classification.

Major imports included mechanical and electrical products, textile raw materials and products, base metals and their products and transport equipment.⁹⁸ The top importers in 2022 were South Africa, Nigeria, and Egypt. The rise may be due to global inflation over the past couple of years, coupled with increased demand for both agricultural and mineral raw materials on the Chinese side. However, more analysis is needed to determine the precise reason for the increased demand for Chinese imports from Africa.

In 2023, Africa’s exports to China totalled USD 109 billion, a decline of about 7% from 2022. Major products include mineral products, base metals and their products and jewelry, precious metals and their products (Figure 9).⁹⁹ The top 10 African exporters collectively contributed about 85% of total African exports in 2022. The top 3 exporters in 2022 were Angola, DR Congo and South Africa. At the end of 2021, China set a target of USD 300 billion for total imports from Africa over three years.

Figure 9: African exports to China by Category (2022)

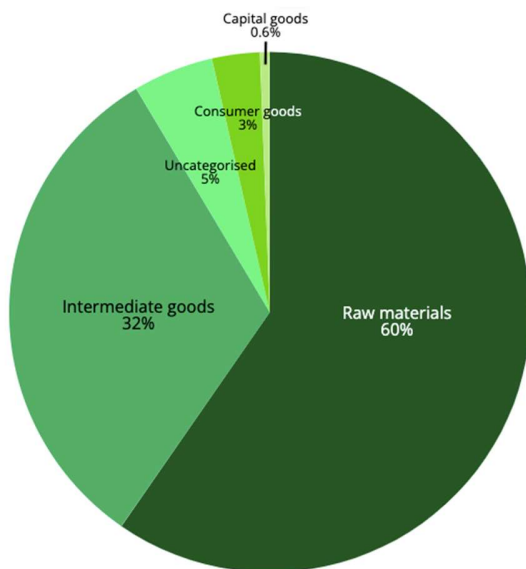
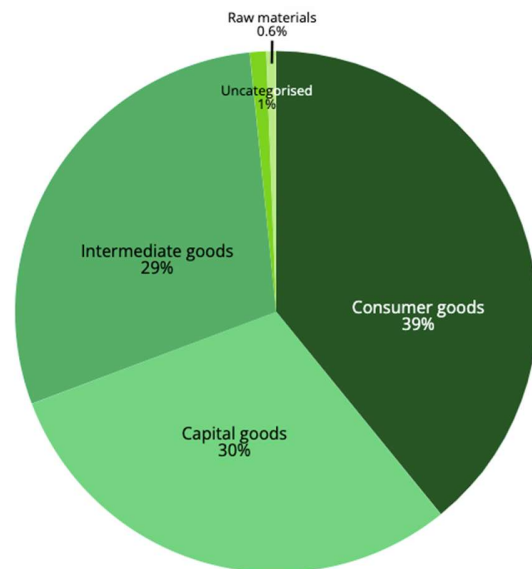


Figure 10: Chinese exports to Africa by Category (2022)



In the first two quarters of 2024, total Africa-China trade grew by 3.9% year on year to USD 145 billion.¹⁰⁰ Compared to 2023, the trade deficit has shrunk for Africa, with China’s imports from the African continent rising by 14% year on year to reach USD 60.15 billion in the first half of 2024, while Chinese exports to the continent declined marginally by 2.3% to USD 84.85 billion.¹⁰¹

According to the Chinese and African governments, both sides will continue to work on the following fields to boost China-Africa trade, including (i) the reinforcement of trade promotion initiatives, (ii) augmentation of the competitiveness of African products, (iii) establishment of

⁹⁸ CAITEC, China and Africa Economic and Trade Relationship Report 2023, 2023, <https://www.caitec.org.cn/upfiles/file/2023/6/20230710163310913.pdf>

⁹⁹ CAITEC, China and Africa Economic and Trade Relationship Report 2023, 2023, <https://www.caitec.org.cn/upfiles/file/2023/6/20230710163310913.pdf>

¹⁰⁰ South China Morning Post, 'Africa's Trade Deficit Shrinks as Exports to China Surge - But Experts Say It Won't Last', 2024, <https://finance.yahoo.com/news/africas-trade-deficit-shrinks-exports-093000828.html?guccounter=1>

¹⁰¹ Ibid.

African geographical indications, (iv) formation of new trade corridors for China-Africa international land and maritime logistics, and (v) establishment of e-commerce hubs for African exports to China. However, the lack of publicly available information hinders a comprehensive analysis and/or understanding of the progress made on these commitments.¹⁰²

¹⁰² Forum on China-Africa Cooperation, 'Forum on China-Africa Cooperation Dakar Action Plan (2022-2024)', http://www.focac.org/eng/zywx_1/zywj/202201/t20220124_10632444.htm

CHAPTER 3 - SOCIAL DEVELOPMENT COOPERATION AND PEOPLE TO-PEOPLE EXCHANGES

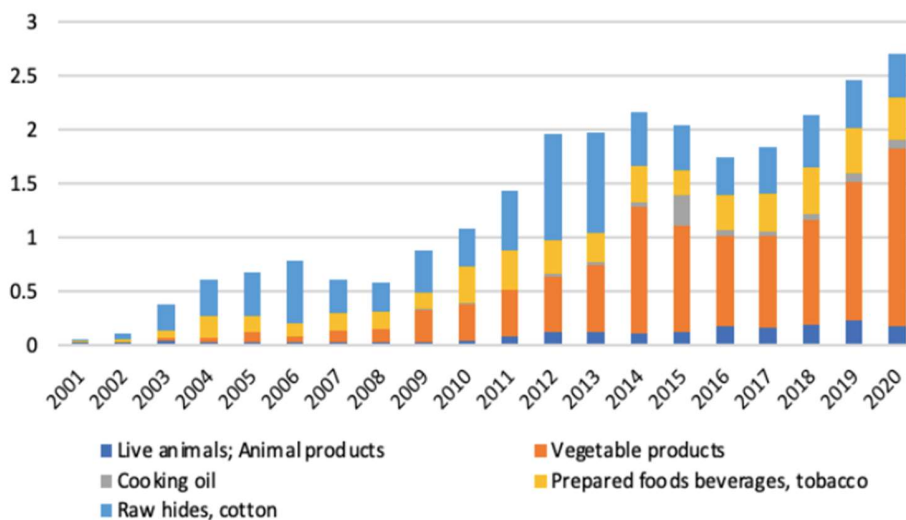
3.1 Agriculture, Food Security, and Food Safety

Key Expectations (e.g. at FOCAC 8):

1. Hold the 2nd Forum on China-Africa Cooperation in Agriculture and convene the first meeting of the China-AU Joint Committee on Agricultural Cooperation
2. Leverage the economic cooperation zones in Africa for cooperation across the whole agricultural industrial value chain to enhance Africa's capacity for localized processing of agro-products
3. Expand the import of agri-food products from Africa and open "green lanes" for African agricultural exports to China, speed up inspection and quarantine procedures

The second Forum on China-Africa Agricultural Cooperation was held in November 2023 in the Hainan Province of China¹⁰³, where China committed to 'strive to promote trade value in agricultural products to more than USD 20 billion within the next decade'.¹⁰⁴ After growing by 8% between 2020 and 2022, the total trade volume in agricultural products between China and Africa in 2023 was USD 9 billion, accounting for 3% of China's total trade in agricultural products. Meanwhile, Africa's exports of agricultural products between 2015 and 2022 totalled USD 30 billion, according to the International Trade Centre (ITC).

Figure 11: African Agricultural Exports to China (2000-2020, USD Billions)



¹⁰³ Ministry of Agriculture and Rural Affairs of the People's Republic of China, '2nd Forum on China-Africa Cooperation in Agriculture Convened', 2023, http://english.moa.gov.cn/news_522/202311/t20231117_301290.html

¹⁰⁴ At the Forum, China's Ministry of Agriculture and Rural Affairs (MARA) released the cooperative initiative (2023–2026) for the implementation of the Plan for China Supporting Africa's Agricultural Modernization, and the initiative for the establishment of the China-Africa Agricultural Science and Technology Innovation Alliance.

Furthermore, China continued to dispatch agricultural experts to African countries such as Tanzania, Kenya, and Uganda. In addition, **China has announced the establishment of several "China-Africa Joint Centres for Modern Agrotechnology Exchange, Demonstration, and Training"** as pledged in the Dakar Action Plan. So far, at least ten of these centres have been established across China, providing a platform for Africa-China agricultural exchanges. In September 2023, ambassadors from Horn of Africa countries had meetings with a joint delegation from relevant cooperation centres.¹⁰⁵

Table 5: China-Africa Joint Centres for Modern Agrotechnology Exchange, Demonstration, and Training

Host Institute	Location	Date Established
Biogas Institute of MARA	Sichuan Province	15-December 2021
Freshwater Fisheries Research Centre	Jiangsu Province	16-December 2021
Shanghai Cooperation Organization Agricultural Technology Exchange Training Demonstration Base	Shaanxi Province	17-December 2021
Chinese Academy of Tropical Agricultural Sciences	Hainan Province	27-January 2022
Shanxi Agricultural University	Shanxi Province	17-October 2022
Nanjing Agricultural University	Jiangsu Province	24-October 2022
Sichuan Agricultural University	Sichuan Province	21-October 2022
Henan Agricultural University	Henan Province	19-October 2022
Qingdao Agricultural University	Shandong Province	11-October 2022
Hunan Agricultural University	Hunan Province	29-June 2023

China's support for agricultural infrastructure development centred primarily on cooperative construction contracts focused on water and irrigation projects, with nine out of eleven projects falling under this category. Power China emerges as a key Chinese stakeholder in the implementation of these projects. However, funding sources remain unclear. In the realm of agro-products, from January 2023 to June 2024, Chinese enterprises invested in and built agricultural industrial parks in Tanzania, Uganda, Ghana, Nigeria, and other countries.

¹⁰⁵ China News Service (Shaanxi), 'Opening A Window for Global Agricultural Cooperation and Exchange', 2023, <https://finance.sina.com.cn/jjxw/2023-09-23/doc-imznryzt1562419.shtml>

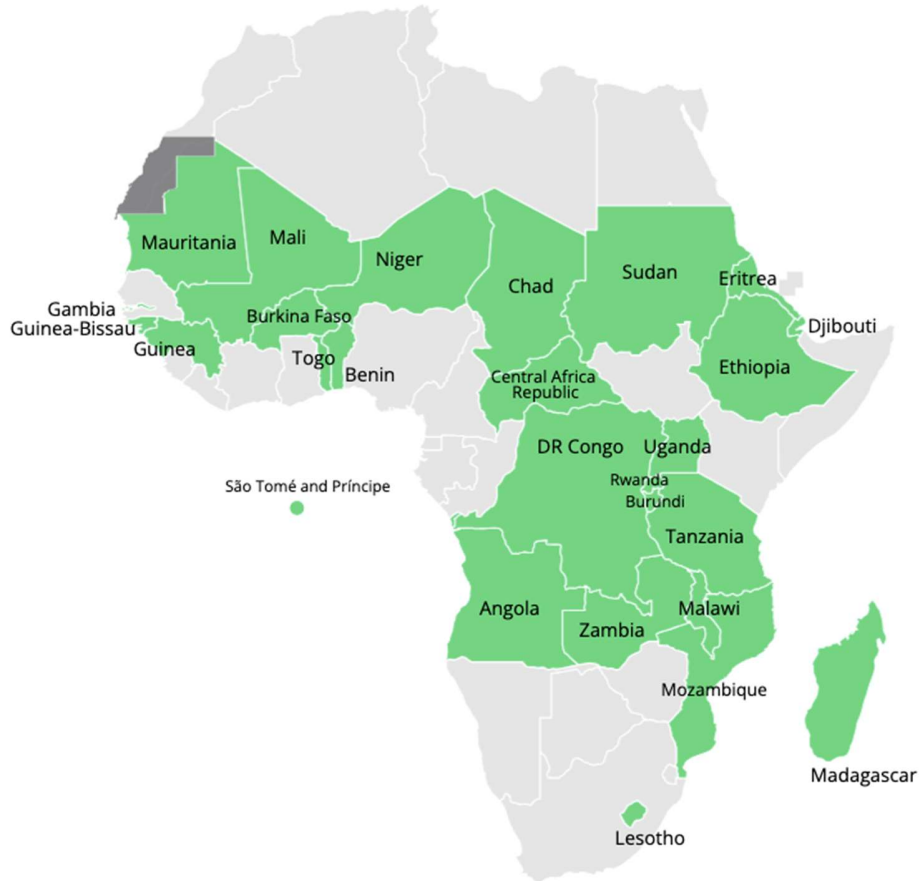
Table 6: Agricultural Infrastructure projects implemented by China (January 2023 - June 2024)

Project Name	Country	Status	Implement Agency
Maragua large water supply and irrigation project	Kenya	In progress	Power China
Nzoia Irrigation Project	Kenya	Complete	Power China
Hadejia Irrigation Project	Nigeria	Complete	Sinopec
Kano Irrigation Project	Nigeria	Complete	Power China
Arusha Eyasi Irrigation Project	Tanzania	Contract Signed	China Railway Engineering Co.
Dendin-Kawa Water project	Nigeria	Contract Signed	STECOL Corporation
Gombe Irrigation Project	Nigeria	Contract Signed	Power China
Benue River Basin Agricultural Irrigation Development Project	Cameroon	Contract Signed	STECOL Corporation
Fishery Wharf Project	Congo, Republic	Complete	Weihai International Economic Technology Cooperation Co (WIETC)
Banting Fishery Wharf Project	Guinea-Bissau	Complete	
Agricultural irrigation project	Cameroon	Contract Signed	Hydropower China
Ouagadougou Green Belt Irrigation Project	Burkina Faso	Complete	Shanghai Municipal People's Government

China also pledged to expand the scope of duty-free products from African LDCs. As of June 2024, 27 African countries had been granted zero-tariff treatment on 98% of exports to China (Figure 12).¹⁰⁶

¹⁰⁶ According to the General Administration of Customs of the People's Republic of China (GACC), the expansion from 97% to 98% zero-tariff covers the following products: peanut oil, sunflower oil, cotton seed oil, margarine, natural water, vermouth and certain wine, certain products that contain tobacco, diesel fuel, some chemicals (styrene, methanol, n-caprylic alcohol, other octyl alcohol, ethylene glycol), polyethylene (PE), polypropylene (PP), animal leather, certain wooden board, corrugated board, and certain types of shoes and engines and vehicles.

Figure 12: African countries benefiting from 98% zero-tariff



Our analysis shows that between 2005 and 2022, since securing a preferential trade scheme, 27 African countries collectively exported USD 578 billion to China and zero-tariff goods represent 99% of the total exports, which underscores the benefits under the zero-tariff treatment. However, some of Africa’s main export products remain excluded from the zero-tariff scheme. These include corn, wheat, rice, certain types of seed oil, tobacco, fertiliser, natural rubber and latex, wooden barrels, paper, wool, and cotton.

China announced the opening of “green lanes” for African agricultural exports at FOCAC 8, as part of efforts to boost agriculture exports from Africa to China. Green lanes seek to simplify and catalyze the inspection and quarantine procedures for the entry of specialty agricultural imports from Africa into China. In line with this, China has entered into Sanitary and Phytosanitary (SPS) agreements covering 16 new agricultural products with 11 African countries since FOCAC 8 (Figure 13).

Figure 13: SPS Agreements signed between China and African countries since FOCAC 8



Table 7: African Countries that Received Food Assistance from China (January 2023 - June 2024)

Country	The Type of Assistance	Implementing Agency
Guinea-Bissau	1000 tons of rice	CIDCA
Burkina Faso	Emergency humanitarian food assistance	CIDCA & WFP
Mauritania	1000 tons of wheat	CIDCA
South Sudan	2396 tons of emergency food donation	CIDCA
Zimbabwe	1000 tons of rice and 1000 tons of wheat	CIDCA
Niger	Emergency food donation	CIDCA
Lesotho	Emergency food donation	CIDCA
Sierra Leone	Emergency food donation	CIDCA
Cabo Verde	Emergency food donation	CIDCA
Republic of the Congo	Food assistance	CIDCA & WFP
Uganda	2 million U.S. dollars of meals to children	WFP

3.2 Medical Care and Public Health

Key Expectations (e.g. at FOCAC 8):

1. Continue to hold the Ministerial Forum on China-Africa Health Cooperation
2. Support African countries to improve their vaccine production, storage and delivery capacities
3. Increase cooperation to strengthen Africa's local drug production and pharmaceutical industry
4. China will complete the construction of the Africa CDC headquarters, complete 10 medical and health assistance projects and speed up the building of China-Africa friendship hospitals
5. China supports and encourages cooperation in pharmaceutical industry and traditional medicine

In 2023, China sent medical teams to 45 African countries alongside donations of medicines, medical equipment, and supplies. For example, China donated over 150 boxes of medical equipment and supplies to South Sudan in March 2023¹⁰⁷ and supplies worth of USD 28,000 to Zambia in July.¹⁰⁸

To promote **technical cooperation and capacity building**, the Global Fund for Development and South-South Cooperation (GFDSC) Medical Services Training Programme was launched in Sierra Leone. In addition, the Shandong University of Traditional Chinese Medicine signed a MoU with Kenyatta University in Kenya to promote research and the use of herbal medicine in the mainstream healthcare system.¹⁰⁹

China also continued to expand the paired hospital cooperation mechanism with 46 hospitals in 41 countries in Africa which has been in operation since 2015. The latest cooperation was between the National Health Commission of China and the Ministry of Health of Gambia.¹¹⁰ In addition, China completed the **construction and handover of the headquarters of the African Centres for Disease Control and Prevention (Africa CDC)** in 2023.

In the first half of 2024, 9 African countries bade farewell to Chinese medical teams and welcomed the new teams arriving. Specifically, Chinese medical teams based in Southern and Eastern African countries contributed to the fight against the cholera outbreak. In January 2024, China donated medical supplies and water tanks to Zambia at the start of the outbreak, and during the month of World Malaria Day in April 2024, China donated USD 1.1 million worth of anti-malaria drugs to Uganda.¹¹¹

Since 2014, China has begun to carry out the “Bright Journey” project in Asian, African, and Central American countries, donating advanced eye surgery equipment and bringing top-tier

¹⁰⁷ Embassy of the People's Republic of China in South Sudan, 'Ambassador Ma Qiang attended the material donation ceremony of the Chinese medical aid team in South Africa', 2023, http://ss.china-embassy.gov.cn/sbwl/202303/t20230331_11052810.htm

¹⁰⁸ Xinhua Net, 'Chinese medical team donates supplies to hospital in Zambia', 2023, <https://english.news.cn/africa/20230708/42e04d0feb614f098b9dee893d5bafa6/c.html>

¹⁰⁹ Xinhua Net, 'Traditional Chinese medicine school inks deal with Kenyan institution to promote herbal medicine', 2023, <https://english.news.cn/africa/20231027/e1b75cfc08024d2a9c8d29060451e937/c.html>

¹¹⁰ Ministry of Commerce of the People's Republic of China, 2023, <http://gm.mofcom.gov.cn/article/j/202402/20240203475397.shtml>

¹¹¹ Xinhua, 'Roundup: China helps Uganda fight malaria as global funding shrinks', 2024, <https://english.news.cn/africa/20240426/4011c657f803494a9a63dc26c0ad9951/c.html>

ophthalmologists to perform cataract surgeries in these countries.¹¹² 2024 marks the 10th year of this project, and two African countries – Zimbabwe and Ethiopia¹¹³ – have signed and renewed the aid project agreement with China.

Table 8: Health Infrastructure projects aided by China (January 2023 - June 2024)

Name	Country	Status
The Harare National Pharmaceutical Warehouse	Zimbabwe	Complete
China-Equatorial Guinea Friendship Hospital	Equatorial Guinea	Complete
Africa CDC Phase I	Continental	Complete
Second phase of China-aided Masaka Hospital	Rwanda	In progress
The obstetrics and gynaecology building project of Mindelo Hospital	Cape Verde	In progress
Juba Teaching Hospital	South Sudan	Contract signed
Maseru regional hospital and eye clinic project	Lesotho	Completed
East African Kidney Institute Complex Building Project	Kenya	Completed
Outpatient Building of Muhimbili Orthopedic Research Institute in Tanzania	Tanzania	Contract signed
Public health laboratory construction project in Kisangani	Congo	Contract signed

However, Africa-China pharmaceutical cooperation is still in its early stages in terms of IP, product certification, and international registration. The pharmaceutical regulatory systems in African countries are modelled off the European and American regulations, which Chinese companies are not well adapted to. Meanwhile, the African pharmaceutical market requires companies to meet WHO PQ certification qualifications. At present, Chinese firms lag behind India in meeting these requirements, limiting their competitiveness in African tenders. Collaboration and investment in R&D are needed for market access.¹¹⁴

Representative Chinese companies that are investing and cooperating in the African pharmaceutical industry include Shanghai Tofflon Sci & Tech, Shanghai Junshi Biosciences, Truking Technology, Humanwell Healthcare, NCPC International Corp, Fosun Pharma, Sanbao Ghana Pharmaceuticals, and Youcare Pharmaceutical Group.

¹¹² Ministry of Foreign Affairs of the People's Republic of China, 'Chinese doctors actively treat foreign cataract patients', 2022, https://www.mfa.gov.cn/ziliao_674904/zt_674979/dnzt_674981/qtzt/zggcddwjw100ggs/xsd/202208/t20220824_10750795.shtml

¹¹³ Forum on China-Africa Cooperation, 'Chinese Ambassador to Ethiopia Meets with Ethiopian Minister of Health', 2024, http://www.focac.org/zfgx/rwjl/202404/t20240410_11279626.htm

¹¹⁴ China Chamber of Commerce for Import and Export of Medicines and Health Products (CCCMHPIE), 'What Opportunities and Challenges do Chinese Companies Face in Exploring the African Pharmaceutical Market?', 2022, <https://www.cccmhpie.org.cn/Pub/9813/179413.shtml>

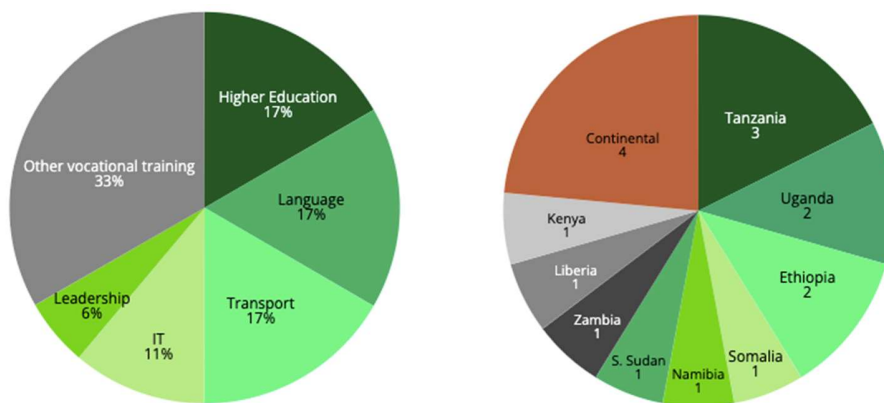
3.3 Education and Youth Development

Key Expectations (e.g. at FOCAC 8):

1. China will continue to work with African countries to set up Luban workshops.
2. Encourage Chinese companies in Africa to offer at least 800,000 local jobs
3. China will build or upgrade 10 schools in Africa and invite 10,000 high-level African professionals to seminars and workshops
4. Explore setting up a China-Africa joint R&D center or lab for road engineering
5. Continue to develop Confucius Institutes in Africa
6. Hold the China-Africa Future Leaders Dialogue, the China-Africa Young Leaders Forum and other mechanisms.

By 2022, there were at least 61 Confucius Institutes in 46 African countries, with at least three more opened in 2023 in Djibouti, Ghana, and Botswana. In May 2024, a joint conference of Confucius Institutes in Africa was held in the University of Nairobi, attended by nearly 100 representatives from various Confucius Institutes and Classrooms across the African continent.¹¹⁵ Furthermore, since the establishment of the first Luban workshop in Djibouti in March 2019, **China has set up 17 Luban workshops in 15 African countries**, with at least two new Luban workshops opened in 2023 in Rwanda¹¹⁶ and Tanzania¹¹⁷ and one in the first half of 2024 in Madagascar.¹¹⁸ These workshops blend academic education with vocational training. In addition, **China supported African countries in building school infrastructure**. In Botswana, for instance, three elementary schools have been constructed to ease the growing burden on the education sector and construction is ongoing for the fourth school, which is expected to be completed by early 2024.

Figure 14: Distribution of Trainings China Organized in Africa in 2023



¹¹⁵ Xinhua, '2024 African Confucius Institute Joint Conference held in Kenya', 2024, <http://www.news.cn/world/20240531/e9d4ee6a292a455eb400cb710a6288aa/c.html>

¹¹⁶ Xinhua, 'China-supported Luban workshop inaugurated at Rwandan Technical School', 2023, <https://english.news.cn/20231120/adf4120f23ff41e6b03638c6301a0045/c.html>

¹¹⁷ Xinhua, 'China, Tanzania launch Luban Workshop to promote youth skills', 2023, <https://english.news.cn/20231120/adf4120f23ff41e6b03638c6301a0045/c.html>

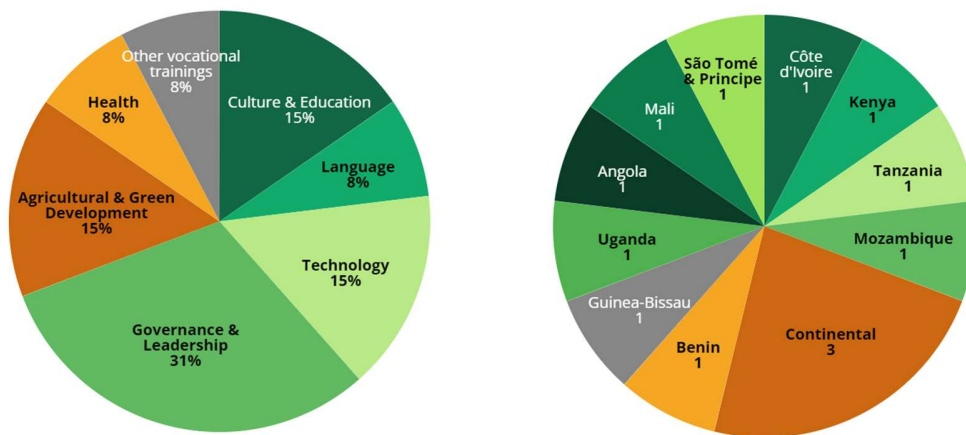
¹¹⁸ Luban Workshop, 'The material handover and unveiling ceremony of the China-aided Luban Workshop project in Madagascar was held', 2024, http://www.lubanworkshop.cn/html/2024/Madagascar_0427/533.html

In 2023, China provided at least **18 training sessions across the continent on leadership, language, information and technology, and vocational skills** (Figure 14). These sessions are organised by both Chinese central and provincial governments, and private entities like Transsion and Huawei.

During the China-Africa Leaders Dialogue in August 2023, **President Xi Jinping announced that China will launch the Plan for China-Africa Cooperation on Talent Development**.¹¹⁹ Through this initiative, China will train 500 principals and teachers at vocational colleges and 10,000 technical personnel each year with both Chinese language and vocational skills for Africa. In addition, China under this initiative plans to support the strengthening of education and innovation in Africa through the China-Africa Universities 100 Cooperation Plan and 10 pilot exchange programmes of China-Africa partner institutes.

In the first half of 2024, China provided at least 13 training sessions to African countries across the continent in the areas of economic and green development, construction, youth leadership, language, culture, technology, and vocational skills (Figure 15). The sessions were organised by central and provincial Chinese governments, embassies, state-owned enterprises and private companies. China was also actively supporting the construction of training centres. For instance, the construction projects of Malintu Youth Training Centre in Namibia and the China-aided Angola Vocational Skills Training Centre were both completed in January 2024.¹²⁰ Chinese companies also won contracts to renovate educational venues and facilities, including the Huawei Training Centre in Congo (DRC).

Figure 15: Distribution of Training China Organised in Africa in 2024



Since the last release of data related to **African students studying in China** in 2019, no new data has been released on this important subject, making it difficult to determine new trends. It is also notable that the data was never clear on what subjects African students choose to study in China, which would be useful for understanding its impact.

¹¹⁹ Ministry of Foreign Affairs of the People's Republic of China, 'Joining Hand to Advance Modernization and Create a Great Future for China and Africa', 2023, https://www.fmprc.gov.cn/eng/zxxx_662805/202308/t20230825_11132533.html

¹²⁰ CICA, Angola President Lourenço cuts the ribbon for the project undertaken by Zhongding International, 2024, <https://www.chinca.org/CICA/info/24011513184811>

In April 2023, **the 7th China-Africa Youth Festival was held in Beijing** to encourage and support cooperation and exchanges among youth under the FOCAC framework. The festival provided a platform for mutual exchange and appreciation among Chinese and African youth. In June 2023, the China-Africa Youth Forum on Innovation and Entrepreneurship was convened in Changsha under the theme "Stimulate Enterprising Spirit for Innovative Development", as a precursor event to the 3rd China-Africa Economic and Trade Expo. The forum attracted 200 youth representatives from both China and Africa.¹²¹

In May 2024, **the 8th China-Africa Youth Festival was held in Beijing and Zhejiang Province**. 64 youth representatives and 28 journalists from 52 African countries were invited to visit the cities of Jinhua, Wuyi town, Dongyang, and Yiwu in Zhejiang Province.¹²² The five-day youth festival programme was convened jointly by the Ministry of Foreign Affairs, Zhejiang Provincial government, and the China Soong Ching Ling Foundation.

Furthermore, the "My Dream" painting competition for African youth, which received submissions from some 2,000 youths from over 40 African countries, was co-hosted by the Secretariat of the Chinese Follow-up Committee of FOCAC, the China Manned Space Engineering Office, and some Chinese embassies and consulates in African countries. In addition, on the eve of Children's Day 2023, Professor Peng Liyuan, China's first lady, along with the Organisation of African First Ladies (OAFSLAD), jointly established the "Warm Children's Heart" Initiative to provide care and support to children globally. Subsequently, the Chinese Embassy and the Minister of Basic Education of South Africa launched the "Warm Children's Heart" Initiative in South Africa, aiming to enhance the quality of learning and teaching in selected schools across different provinces.

3.4 Tourism

Key Expectations (e.g. at FOCAC 8):

1. China will carry out the China-African Culture and Tourism Training Cooperation Plan
2. The two sides will work to resume development of the tourism industry after COVID-19
3. Both sides commit to holding of an annual African travel fair in China
4. China will encourage Chinese nationals to travel to Africa and African countries will provide more suitable tourism products and a safer tourism environment

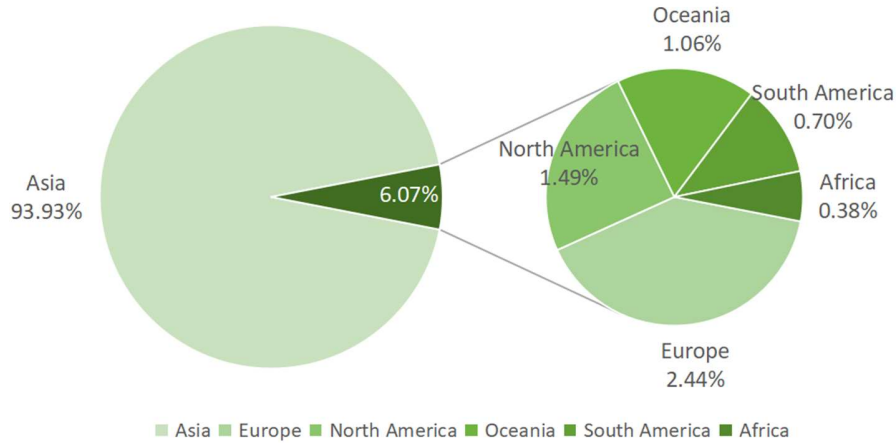
The popularity of Africa among Chinese travellers has been growing in recent years. Africa stood out as the continent with the fastest-growing tourism sector in 2023, with international tourist arrival numbers at 96% of 2019 levels according to UN Tourism, the highest recovery percentage in the world. The total international tourist movements reached 66 million in the last year.¹²³ Ethiopia, Tanzania, and Morocco were ranked as Africa's top tourism performers in 2023.

¹²¹ World Youth Development Forum, 'China-Africa Youth Forum on Innovation and Entrepreneurship held in Changsha', 2023, https://www.wydf.org.cn/en/News/202307/t20230727_792693.htm

¹²² Forum on China-Africa Cooperation, 'The 8th China-Africa Youth Festival Tour to Zhejiang', 2024, http://www.focac.org/zfgx/rwjl/202405/t20240528_11313240.htm

¹²³ UN Tourism Data Dashboard, 'Global and regional tourism performance', <https://www.unwto.org/tourism-data/global-and-regional-tourism-performance>

Figure 16: The proportion of Chinese mainland outbound tourists' destinations



However, the African continent still remains a niche travel destination. In the first half of 2023, outbound tourist destinations collectively hosted just over 40 million Chinese mainland visitors, but less than 1% were hosted in Africa (Figure 16). While the number of Chinese tourists visiting Africa pre-COVID-19 was low—representing just 1 out of every 100 Chinese tourists internationally—different African countries dependent on tourism have started aggressive marketing campaigns to attract Chinese tourists, and this is expected to continue in the post-COVID-19 era.¹²⁴ To deepen cooperation in tourism, **the Club of Sino-Africa Culture and Tourism was launched in Nairobi, Kenya**, to promote cross-cultural understanding through culture and tourism.¹²⁵ In May 2024, the **China-Kenya Tourism Service Platform** was launched jointly by Hunan Province and Kenya Tourism Board to promote good practises in cultural tourism development between the two countries.¹²⁶ During the same month, Zambia and Tanzania saw the grand opening of the 2024 China Tourism and Culture Year.

Visa policies also have a significant impact on tourism. The convenience and accessibility of a visa directly influences tourists' choice of destination. Currently, 24 countries have signed and implemented mutual passport visa exemption agreements with China, the majority of which are in Asia. **The mutual visa-free regime applies only to two African countries: Mauritius and Seychelles**¹²⁷ (Figure 17). Additionally, eight countries have unilaterally granted visa exceptions to China: Gabon, Morocco, Mozambique, Tunisia, Zambia, Angola, and Benin.

¹²⁴ Hannah Ryder & Rosie Wigmore, 'Chinese tourists could be the future of African tourism', 2021, <https://www.independent.co.uk/chinese-tourists-could-be-the-future-of-african-tourism/2/>

¹²⁵ China is Kenya's sixth biggest tourism source market internationally, contributing about 6% of total international tourist arrivals in the country before the pandemic.¹²⁵ In 2023, Kenya received 34,638 Chinese tourists from January to August, up from 13,601 recorded in the same period in 2022, translating into a growth rate of 154%.¹²⁵

¹²⁶ Xinhua News, 'China's Hunan province, Kenya launches platform to explore new models of tourism cooperation', 2024, <https://english.news.cn/africa/20240511/c6ac497c75f3474d96616d400bb12e35/c.html>

¹²⁷ Chinese Consular Services Website, 'List of visa exemption agreements between China and other countries', 2024, http://cs.mfa.gov.cn/wgrh/bgzl/202110/t20211029_10403855.shtml

Figure 17: China's Mutual Visa-Free Regime

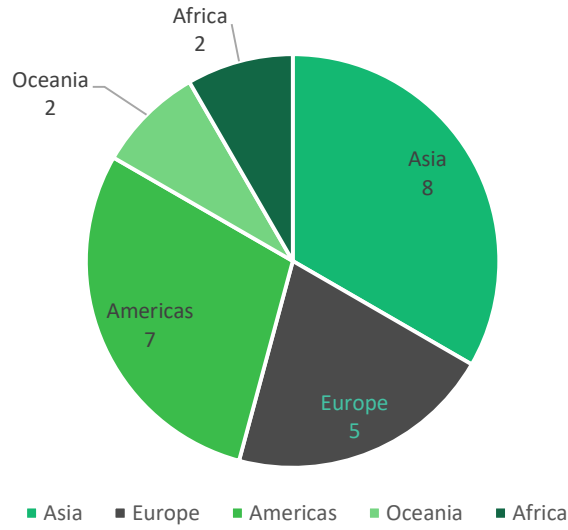
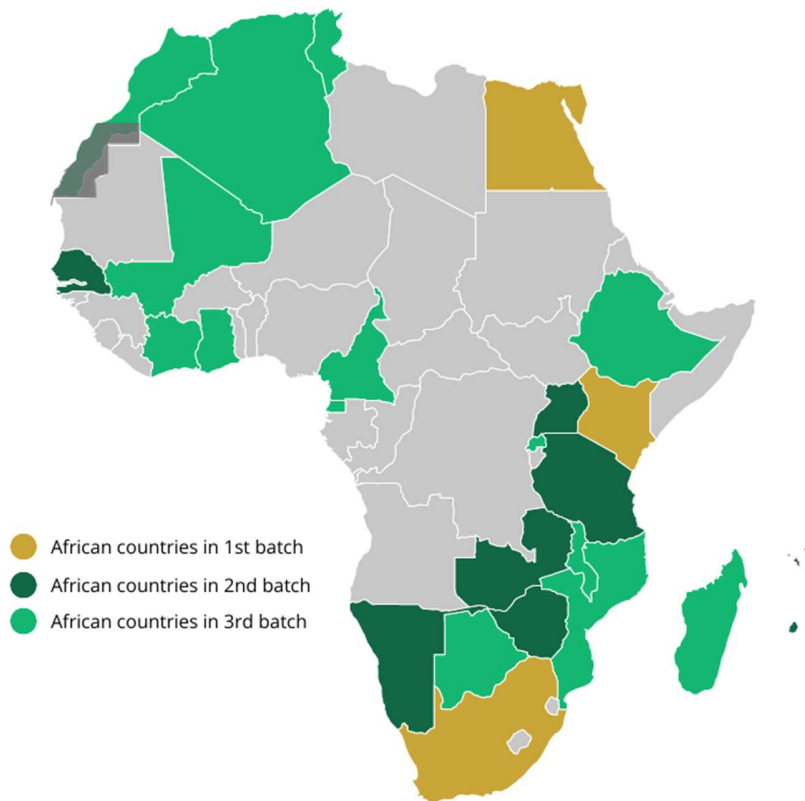


Figure 18: African countries on the list of resumption of group tours



In 2023, Chinese travel agencies resumed **organising outbound group tours**. Three African countries were included in the first batch of 20 countries cleared by the Chinese Ministry of Culture and Tourism as destinations for outbound Chinese tourists. Egypt, Kenya, and South Africa were the first African countries to receive Chinese tour groups in three years. After that, the Chinese government announced the second and third batch of destinations in China's pilot programme for outbound group tours, with more African countries included on the list.

To promote capacity building in tourism as well as the development of green tourism, the China-Africa Cultural and Tourism Cooperation Forum and the Hunan-Africa Product and Tourism Matchmaking Session were held as part of the third China-Africa Economic and Trade Expo held in 2023. In November 2023, the first working meeting of the **twinning arrangement between Wuyishan, China, and Lope National Park, Gabon**, was successfully held. Both sides have engaged in fruitful exchanges on park management, ecotourism, and addressing human-wildlife conflicts. Follow-up discussions focused on twinning agreements, mutual group visits, personnel training, and plans for environmental protection.¹²⁸

Air traffic between China and Africa rocketed by 630% between 2009 and 2019.¹²⁹ With China reopening its borders, flights between China and African countries resumed in 2023. In May, Ethiopian Airlines fully resumed flights from Shanghai, Beijing, Guangzhou, and Chengdu to Addis Ababa, Ethiopia. In October, Ethiopian Airlines increased the frequency of both passenger and cargo flights on the Guangzhou-Addis Ababa route from seven to ten flights per week, officially launching the "China-Africa Air Express."¹³⁰ Additionally, China Eastern Airlines' inaugural flight between Shanghai and Cairo took place on Dec 11, 2023.¹³¹

3.5 Cultural Cooperation

Key Expectations (e.g. at FOCAC 8):

5. Both sides will step up subnational exchanges and build cultural exchanges and cooperation mechanisms through sister cities.
6. Both sides will promote people-to-people exchanges and cooperation between China and Africa.
7. The two sides will continue to open more culture centers in China and Africa.
8. China will continue to carry out flagship exchange activities such as Happy Spring Festival and China-African Cultural Focus, support mutual visits of Chinese and African art troupes and organizations.

Cultural exchange activities were organised by Chinese institutions to promote people-to-people exchanges, and they cover every region of Africa (Figure 19 & 20). Hosted by Chinese embassies and Confucius Institutes, these activities covered a wide range of fields, including traditional Chinese culture, films, language education, and so on. Compared to 2022, offline cultural

¹²⁸ Chinese Embassy in Gabon, 'The first video working meeting of the pairing arrangement between Wuyi Mountain in China and Lope National Park in Gabon was successfully held', 2023, <https://mp.weixin.qq.com/s/XzmuEKx4ED0HkGbUxL-a6Q>

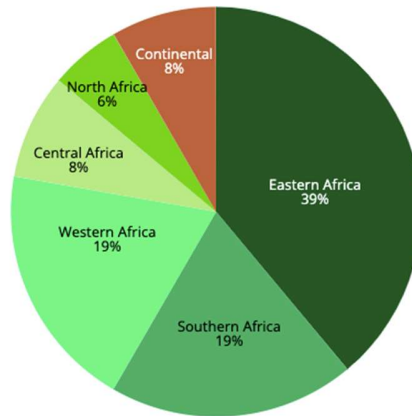
¹²⁹ QUARTZ, 'Air traffic between China and Africa has jumped 630% in the last decade', 2019, <https://qz.com/africa/1675287/china-t-o-africa-flights-jumped-630-in-the-past-nine-years>

¹³⁰ CAAC News, 'China-Africa Air Express launched', 2023, http://www.caacnews.com.cn/1/6/202310/t20231026_1371619.html

¹³¹ PR Newsire, 'China Eastern Airlines launches direct flight route between Shanghai and Cairo', 2023, <https://www.prnewswire.com/news-releases/china-eastern-airlines-launches-direct-flight-route-between-shanghai-and-cairo-302020037.html>

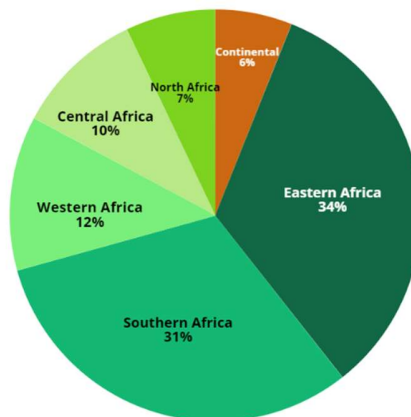
exchanges became more frequent in 2023. In September, the Zhejiang Wu opera troupe was performed in Kenya, Ethiopia and Eritrea. Furthermore, several film-related activities were held. With the support of Chinese Minister of Culture and Tourism, **Chinese film festivals launched in Kenya and Angola**, alongside two **Chinese Film Weeks held in Burkina Faso and the Democratic Republic of the Congo**. Language learning initiatives like the "Chinese Bridge" programmes also played a pivotal role in strengthening cultural bonds between China and Africa.

Figure 19: Proportion of China-Africa cultural activities by region (2023)



In the first half of 2024, the majority of Africa-China cultural activities were centred around the finals of “Chinese Bridge” language contest, which was held in more than 20 African countries. While most African countries have previously hosted this language competition, this was the first time for Mauritania. Other cultural events centred around important celebrations, such as the International Chinese Language Day, Women’s Day, Africa Day, and Children’s Day. In addition to this, 2024 saw a continuation of film weeks and photography exhibitions being held in countries like Mauritius, Gabon, Kenya, South Africa and Benin¹³². A noticeable occasion in Africa-China cultural exchange is a tripartite China-France-Central Africa Republic cultural exhibition opened in May, partly coinciding with President Xi’s visit to France.

Figure 20: Proportion of China-Africa cultural activities by region (2024)



¹³² Chinese Embassy in Central African Republic, ‘China-France-Africa Trilateral Cultural Exhibition Grandly Held in Bangui’, 2024, http://cf.china-embassy.gov.cn/xwdt/202405/t20240523_11310117.htm

CHAPTER 4 - PEACE AND SECURITY COOPERATION

Key Expectations (e.g. at FOCAC 8):

1. Strengthen the implementation of the China-Africa Peace and Security Plan (including military education, military training, maritime security, etc).
2. Undertake 10 peace and security assistance projects in Africa, continue military assistance to the African Union
3. Continue to hold the China-Africa Forum on Peace and Security
4. Work to establish a China-Africa police cooperation mechanism

Peace and security have become a crucial facet of Africa-China cooperation as President Xi Jinping announced that China sought to undertake security projects, peacekeeping cooperation as well as military assistance and training with its African partners, with the key objective of countering terrorism and supporting regional security programmes.¹³³ In 2023, China pursued its peace and security cooperation with Africa through the Global Security Initiative (GSI).

The 3rd edition of the China-Africa Peace and Security Forum was held in Beijing in August 2023 under the theme 'Implementing the Global Security Initiative, Strengthening China-Africa Solidarity and Cooperation'.¹³⁴ The forum brought together leaders in the security sector from China and 50 African countries to consolidate networks of strategic communications between Chinese and African defence departments and to explore possible ways in which African militaries and security architectures can align with China's Global Security Initiative (GSI).

China remained a leading defence equipment supplier to Africa in 2023, offering new products to new and old African customers. In August 2023, **China's largest weapons producer, Norinco, opened a new sales office in Senegal and plans to set up offices in Mali and Cote d'Ivoire**, adding to its existing offices in Nigeria, Angola and South Africa.¹³⁵ Progress in China arms sales to African countries in 2023 builds on a decade of exponential growth between 2010-2021 during which China became a leading supplier of arms to Africa, only second to Russia.¹³⁶ The majority of these arms went to five African countries closely associated with the BRI: Angola, CAR, Ethiopia, Mali, and Sudan. The low cost and ease of maintenance and operations are key incentives for African governments to buy into China's GSI.

¹³³ South China Morning Post, 'China using its new Global Security Initiative to build military standing in Africa', 2022, <https://www.scmp.com/news/china/diplomacy/article/3187151/china-using-its-new-global-security-initiative-build-military>

¹³⁴ Abhishek Mishra, 'The China-Africa Peace and Security Forum: Practical Outcomes or Same Old Rhetoric?', 2023, <https://www.idsa.in/idsacomments/The-China-Africa-Peace-and-Security-Forum-AMishra-060923>

¹³⁵ France 24. 'Friends at any price: China seeks allies, arms markets in West Africa as French influence wanes', 2023, <https://www.france24.com/en/africa/20230826-china-seeks-new-allies-and-arms-markets-in-west-africa-as-french-influence-wanes>

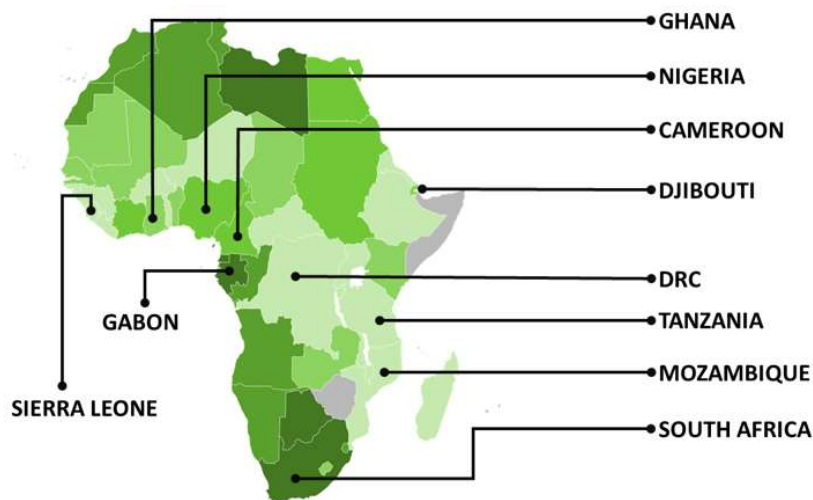
¹³⁶ Atlantic Council – Goeconomic Center, 'China in Sub-Saharan Africa: Reaching far beyond natural resources', 2023, <https://www.atlanticcouncil.org/wp-content/uploads/2023/03/China-in-Sub-Saharan-Africa-Reaching-far-beyond-natural-resources.pdf>

Figure 21: African countries that acquired defence equipment from China in 2023



2023 also saw an uptick in Africa-China cooperation in maritime security with the Chinese People’s Liberation Army Navy (PLAN) conducting several naval tours to several African countries, including Djibouti, Tanzania, Nigeria, Ghana, Sierra Leone, Cameroon, and Mozambique.¹³⁷ Piracy, peacekeeping efforts, and deeper cooperation are considered the main factors driving these tours.

Figure 22: African Countries visited by the People’s Liberation Army Navy (2017- 2023)



¹³⁷ Vanguard, ‘Chinese Navy’s curious Africa tour’, 2023, https://www.vanguardngr.com/2023/07/chinese-navys-curious-africa-tour/#google_vignette

In 2023, Africa remained the top host destination for Chinese peacekeeping troops, with 80% of Chinese UN Peacekeeping troops deployed in Africa. Furthermore, upon the conclusion of the UN peacekeeping mission in Mali in 2023, China indicated its intention to deepen relations with Mali on trade and business, in keeping with its non-intervention policies. China announced the Mali Digital project and the African Solar Belt Programme. The commercial interests of China in the Sahel have been limited, but progress in relations with Mali indicates a change in that trend, as Burkina Faso is also reported to have normalized relations with China recently.¹³⁸

In July 2023, **Ethiopia signed an agreement with China for the establishment of a law enforcement cooperation centre** and to hold a joint bilateral forum in 2025.¹³⁹ It has joined 40 other African nations that have signed law enforcement cooperation agreements with China.¹⁴⁰

In the first half of 2024, 17 projects were recorded in the field of peace and security. The Chinese navy held engagements with Tanzania and South Africa, and Chinese peacekeeping forces continued to support peace-building in DRC and South Sudan. Meanwhile, China strengthened capacity building cooperation with the police in Zimbabwe, Ethiopia, and Mozambique, and the anti-corruption collaboration with Mali.

¹³⁸ South China Morning Post, 'China tipped to keep Mali ties strictly economic as UN peacekeeping mission wraps up', 2024, <https://amp-scmp-com.cdn.ampproject.org/c/s/amp.scmp.com/news/china/diplomacy/article/3251351/china-tipped-keep-mali-ties-strictly-economic-un-peacekeeping-mission-wraps>

¹³⁹ Fana Broadcasting Corporation, 'Ethiopia, China sign agreement to establish joint law enforcement cooperation center', <https://www.fanabc.com/english/ethiopia-china-sign-agreement-to-establish-law-enforcement-cooperation-center/>

¹⁴⁰ South China Morning Post, 'How China is expanding its law enforcement activities across Africa', 2023, <https://www.scmp.com/news/china/diplomacy/article/3222215/how-china-expanding-its-law-enforcement-activities-across-africa>

CHAPTER 5 - GREEN DEVELOPMENT

5.1 Energy and Natural Resources Infrastructure

Key Expectations (e.g. at FOCAC 8):

1. Work together to enhance cooperation in the energy sector under the China-African Union Energy Partnership, jointly improve the level of electrification in Africa
2. Capacity building in the energy sector
3. Improve the structure of the African energy and resources industrial chain, improving its capacity to process energy and resources products toward green development
4. Align development plans in sustainable use of energy and resources
5. Strengthen cooperation in water conservancy
6. Strengthen cooperation in the photovoltaic industry

According to information available through public sources, with a total of 72 projects worth more than USD 20 billion, Africa was the leading region for Chinese engagement in green energy investments in 2023. Of the 72 projects recorded, 36 are new initiatives, 15 are currently underway, and 21 have been successfully completed. In the first six months of 2024, 40 projects were filtered from the same public sources, including 14 new projects, 10 ongoing projects, and 16 completed ones. These projects involve Chinese contractors, and funding sources include African governments and the China Exim Bank from the Chinese side.

In 2023, photovoltaic (PV) power emerged as a focal point in Africa-China cooperation on clean energy, with 23 active projects, of which 19 were newly established. Southern Africa stands as the leading region for PV development, boasting 10 projects including the 123MW PV project in Damraght, South Africa undertaken by China Power Construction Group; the Ilute 33MW PV Project in Zambia, undertaken by the Chinese enterprise China Electric Power Engineering¹⁴¹, is the first renewable energy project in sub-Saharan Africa to be developed by an independent electricity purchaser; and the 30MW Mafeteng PV project in Lesotho, backed by financing from the Exim Bank of China, exemplifies China's new 'Small and Beautiful' approach.¹⁴² At the policy level, "African Light Belt" projects were announced to support more "PV+" projects.¹⁴³ In 2024, the dominant role of PV has remained so far, accounting for almost 50% (18 projects) out of the total 40 projects. Newly signed, ongoing, and completed projects each accounted for one-third of PV projects collected from January to June.

Chinese investors have shown increasing interest in African PV manufacturing.¹⁴⁴ In 2023 alone, countries including Nigeria and South Africa have witnessed new solar manufacturing plants. For instance, Nigeria's solar cell factory will be the first such facility in West Africa and is being built by the National Agency for Science and Engineering Infrastructure, with the majority of funding

¹⁴¹ China International Contractors Association, 'Zambia Green Power 33MW Photovoltaic Power Station Project Signs Preliminary Work Agreement', 2023, <https://www.chinca.org/CICA/info/23072612281211>

¹⁴² China Global South Project, 'A Chinese-Backed Solar Project in Lesotho Highlights Beijing's New 'Small is Beautiful' Infrastructure Development Strategy in Africa', 2023, <https://chinaglobalsouth.com/2023/06/30/a-chinese-backed-solar-project-in-lesotho-highlights-beijings-new-small-is-beautiful-infrastructure-development-strategy-in-africa/>

¹⁴³ 'China -Africa New Energy Cooperation Allows More 'Small and Beautiful' Projects to Benefit Africa', 2023, <http://www.dji-d.net/news/20240201/37f399402.html>

¹⁴⁴ Development Reimagined, 'Infographic: What is Africa's untapped potential for Environmental Goods Manufacturing?', 2023, <https://developmentreimagined.com/environmental-goods-manufacturing-potential/>

from the China-Africa Development Fund.¹⁴⁵ Considering Africa’s huge solar energy potential and market, China and African countries are expected to strengthen cooperation in this field in the future.¹⁴⁶

Figure 23: Regional Distribution of Clean Energy Projects in 2023

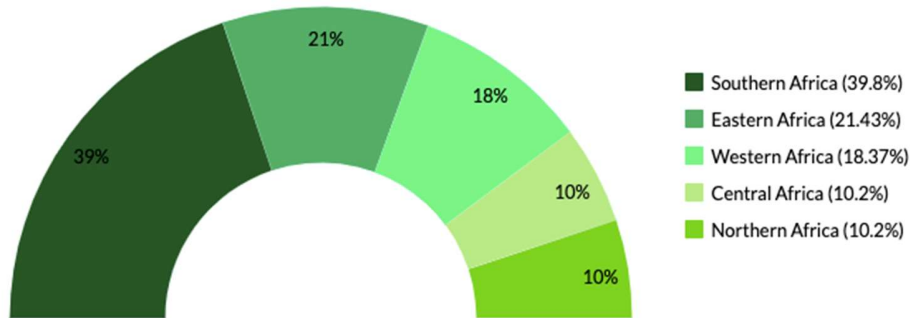
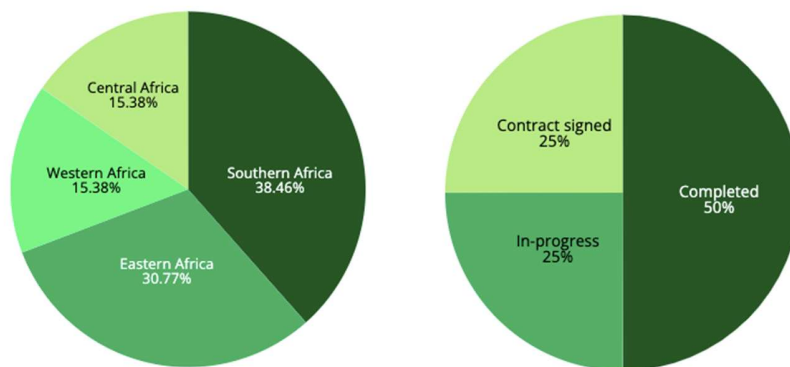


Figure 24: Regional Distribution and Projects Status of Hydro-power Projects in 2023



With 16 projects spanning 13 African countries in 2023, hydro-power production also featured strongly in Africa-China green development cooperation. For instance, the 700MW Zonglu hydro-power station financed by the Exim Bank of China will be the largest hydro-power station in Nigeria. The Busuanga hydropower station in DR Congo went online in October 2023: financed, built, and operated by China Railway Resources Group. This project aims to contribute around one-tenth of the country’s electricity production after all four units are operational.¹⁴⁷¹⁴⁸ Similarly, hydro-power ranked second in terms of the number of projects in Africa-China green cooperation in the first six months of 2024, with 9 projects recorded.

A total of nine projects were recorded in the realm of water conservation in 2023, with many of them related to water supply and half of them concentrated in East Africa. The China

¹⁴⁵ Energy Monitor, ‘Why domestic solar manufacturing could turbocharge Africa’s energy transition’, 2023, <https://www.energymonitor.ai/tech/renewables/why-domestic-solar-manufacturing-could-turbocharge-africas-energy-transition/?cf-view>

¹⁴⁶ Development Reimagined, ‘Infographic: Africa’s Huge Solar Power Potential’, 2023, <https://developmentreimagined.com/infographic-exploring-africas-renewable-solar-power-potential-in-2023/>

¹⁴⁷ State-owned Assets Supervision and Administration Commission of the State Council, ‘China-Constructed Busuanga Hydropower Station Starts Generating Electricity’, 2023, http://en.sasac.gov.cn/2023/10/13/c_16036.htm

¹⁴⁸ China International Contractors Association, ‘China Railway Group Officially Completed the Construction of A Hydropower Station in the Democratic Republic of the Congo’, 2023, <https://www.chinca.org/CICA/info/23101013143511>

Geo-engineering Corporation undertook a water supply project in Comoros, funded by the United Nations Development Programme (UNDP)'s Green Fund with about USD 5 million.¹⁴⁹ In addition, **China collaborated with African countries on electricity conservation and the promotion of electric transportation.** Chinese electric buses, manufactured by BYD¹⁵⁰ and Yutong¹⁵¹ entered the Kenyan and Nigerian markets.

China and African countries are collaboratively exploring the realms of hydrogen, wind, and biomass power.¹⁵² Although the current hydrogen energy cooperation projects are relatively limited, notable initiatives have commenced in North Africa, primarily in Egypt and Morocco. For instance, Egypt's Suez Canal Special Economic Zone signed an approximately USD 7 billion agreement with China Energy Engineering to develop a green ammonia and green hydrogen project in its Sokhna Industrial Zone.¹⁵³ Similarly, China constructed the 250MW Wind-Storage Smart Energy Park Project¹⁵⁴ in Niger and participated in a biomass project in Côte d'Ivoire, which is slated to be the largest biomass power station in West Africa.¹⁵⁵

In a nutshell, 2023 saw an acceleration in Africa-China cooperation in green development. Photovoltaic (PV) and hydropower have emerged as strong focal points. However, the collaboration extends beyond conventional methods, with Chinese energy-saving products entering the African market and the donation of clean energy equipment, showcasing diversified approaches in joint efforts to combating climate change. Notably, progress has been made in green development technology transfer and cooperation in emerging technologies.

5.2 Ecological Protection and Climate Response

Key Expectations (e.g. at FOCAC 8):

1. The two sides will continue to cooperation on ecological protection
2. China will establish a China-Africa marine science and blue economy cooperation centre
3. China will undertake 10 green development, environmental protection and climate action assistance projects in Africa
4. Enhance cooperation on wildlife protection, desertification prevention, and establish green protected areas

Africa-China cooperation in this domain is centred on policy development and knowledge exchange. Publicly available data indicates that **China implemented three “Ecological Protection and Climate Response” projects** in 2023 and two more in the first half of 2024.

¹⁴⁹ China International Contractors Association, 'Completion Acceptance of China Geology's first United Nations Green Fund Water Supply Project', 2023, <https://www.chinca.org/CICA/info/23102708484211>

¹⁵⁰ Department of African Affairs of the Ministry of Foreign Affairs of the People's Republic of China, 'Chinese Electric Buses Promote Emission Reduction in Kenya', 2023, <https://mp.weixin.qq.com/s/LsoqNgiourVX-gZjTBfleA>

¹⁵¹ Xinhua African, 'Chinese Bus Maker Yutong Launches First Electric Buses in Nigeria', 2023, <https://english.news.cn/africa/20230524/a8eb49cbfd7a40e3b2b45177060ac7bb/c.html>

¹⁵² Development Reimagined, 'Infographic: Africa's Amazing Wind Power Potential', 2023, <https://developmentreimagined.com/africas-amazing-wind-potential-2023/>

¹⁵³ Dafeng Hao, 'Egypt Signed Contracts Exceeding USD 14.7 billion with Two Chinese Companies', 2023, <https://finance.ifeng.com/c/8TypCflhK9k>

¹⁵⁴ Belt and Road Portal, 'Weekly Report on Overseas Projects of Chinese Enterprises (2023.6.24-2023.6.30)', 2023, <https://www.yidaiyilu.gov.cn/p/0FHFRBAB.html>

¹⁵⁵ Belt and Road Portal, 'Chinese Company Lays Foundation Stone for Côte d'Ivoire Biomass Power Plant Project', 2023, <https://www.yidaiyilu.gov.cn/p/0067B13G.html>

Training and climate change technology exchange events were held in South Africa¹⁵⁶, Botswana¹⁵⁷, and Egypt, while cooperation on wildlife protection between China and Zimbabwe was announced.¹⁵⁸ Furthermore, **six projects were implemented under Africa-China maritime cooperation** in 2023, including the China-Africa Cooperation Center for Marine Science and Blue Economy, which was opened in Hangzhou, China.¹⁵⁹ Bilaterally, China and South Africa signed an MoU to deepen blue economic cooperation¹⁶⁰, while Huawei held a conference on Coral Reef Protection in Mauritius.¹⁶¹ In 2024, another project was identified under maritime cooperation until the end of June, which refers to China Water Company's collaboration with the Ministry of Fisheries and Maritime Economy of Guinea-Bissau.

¹⁵⁶ Chinese Embassy to South Africa, 'Ambassador to South Africa Attended the Opening Ceremony of the China-South Africa Climate Change Training Course', 2023, <https://mp.weixin.qq.com/s/76479qU03AOFbaT81DEchg>

¹⁵⁷ Xinhua Africa, 'China Hands over Mobile Meteorological Station to Botswana', 2023,

<https://english.news.cn/africa/20231222/ca1810c4f03f4a48881cf3a33c2a3f99/c.html>

¹⁵⁸ Xinhua Africa, 'Egypt Keen to Cooperate with China in Environmental, Climate Technologies: Minister', 2023,

<https://english.news.cn/africa/20230915/29ec4380b0bc406794dddae190a3eacc/c.html>

¹⁵⁹ Department of African Affairs of the Ministry of Foreign Affairs of the People's Republic of China, 'China-Africa Marine Science and Blue Economy Cooperation Center Established', 2023, <https://mp.weixin.qq.com/s/IgdZQbMIQUhTRe-C2mPX0Q>

¹⁶⁰ Department of African Affairs of the Ministry of Foreign Affairs of the People's Republic of China, 'List of Achievements of President Xi Jinping's State Visit to South Africa', 2023, <https://mp.weixin.qq.com/s/IeVlf3Rj5nLZAmSvYK2qg>

¹⁶¹ Chinese Embassy to Mauritius, 'Ambassador to Mauritius attended Huawei's 'Technology to Protect Nature' Coral Reef Protection Project Results Conference', 2023, <https://mp.weixin.qq.com/s/QpX4vtKg4QOuVNr7m4s44w>

CHAPTER 6 - REFLECTIONS ON THE WAY FORWARD

This report shows clearly that overall, during 2023, amidst the emergence from the COVID19 pandemic, there was significantly increased proactivity on both the Chinese and African sides. There was significant progress on the African side with the African Union and African governments significantly increasing their engagement with China. More events and dialogues were held, including notably the CAETE and several consultative forums.

From the perspective of financing, the majority of China's infrastructure projects with Africa in the post-COVID era were in the form of contracted construction with Chinese enterprises winning bids. Therefore, African continental institutions such as the African Development Bank (AfDB) can follow the AU's lead and increase their engagement in such projects and with China to increase China's financial participation.

Furthermore, in the realm of trade, with the African trade deficit reducing in the first half of 2024, China and African states can build on the current progress to not only scale but balance Africa-China trade and investment by diversifying Africa's exports to China in terms of both countries and products. A relevant sphere is the cooperation between China and African states in industrial and manufacturing sectors. With more Chinese-invested industrial parks and factors landing on the African continent, both sides can work to increase the variety and value of products and creating more job opportunities. The current cooperation trend indicates that China and African states are expanding the cooperation beyond traditional labour-intensive low-technology sectors, which offers an opportunity for both sides to align the cooperation with the four AfCFTA priorities, including pharmaceuticals, automotive, agroprocessing, and textiles.

There has also been progress in the social dimension of cooperation, encompassing areas like education, healthcare, poverty alleviation, and even peace and security. Highlighted areas include youth development and capacity building, with most projects occurring in China.

All these reflections on progress, challenges, and future gaps can help in understanding an overview of Africa-China cooperation in the post-COVID era, and offering a rough idea about China's upcoming collaboration with African governments and organisations on a bilateral and collective level.

That said, while we hope this report can be useful to this end, as noted in the introduction to this report, it is challenging to collate comprehensive information on Africa-China activities and link them to policy trends. Therefore, this report and its reflections should not be seen as an exhaustive assessment but simply as an important and useful input to African-led and initiated processes to engage in an improved and strategic way with China and other development partners. Our hope is that we can continue to produce such reports to help audiences from both Africa and China gather information and think creatively about how to continuously improve Africa-China cooperation for mutual benefit.