



FOCAC INTELLIGENCE

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Nigeria Country Brief

Nigeria's position within the 2025-2027 FOCAC cycle, the wider possibilities for Africa, and the verified evidence of delivery to date.

AT A GLANCE

5

Nigeria records subjected to full verification

3

Direct FOCAC delivery (A1)

+80%

Chinese imports from Nigeria, H1 2026 (US\$2.3bn)

No

Early harvest arrangement yet; zero-tariff window runs to 30 Apr 2028



Verification cut-off: 30 September 2026 | **Edition:** Public, version 1.0

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PDIL FOCAC INTELLIGENCE

Executive summary

FOCAC and this brief

The Forum on China-Africa Cooperation (FOCAC), founded in Beijing in 2000, is the main platform through which China, the 53 African countries with which it has diplomatic relations and the African Union Commission set shared priorities for cooperation. The September 2024 Beijing Summit adopted the Beijing Action Plan (2025-2027): ten partnership actions, RMB360 billion in announced financial support and zero-tariff treatment for Africa's least developed countries, which China extended in June 2025 to all 53 African partners with effect from 1 May 2026. The cycle will be reviewed at the 10th FOCAC Ministerial Conference in the Republic of the Congo in 2027.

This brief asks what the current cycle has actually delivered in Nigeria, and how much of it is genuinely new FOCAC delivery. Each record is tested against a conservative method that separates what was announced from what was delivered, and new FOCAC delivery from cooperation that was already under way (Annex B).

Why Nigeria matters in this wider picture

Nigeria is important to the current FOCAC cycle because of the scale of its economy, its manufacturing and agricultural potential, its infrastructure needs, its role in ECOWAS and the AfCFTA market, and the breadth of its existing relationship with China.

What we found

Nigeria's post-Beijing FOCAC record now spans trade access, an economic partnership framework, agricultural research, grant support and cassava cooperation. Implementation is real and Nigerian exports to China are growing, although that growth began before the zero-tariff preference applied. The strength of attribution varies considerably across individual activities, and the decisive trade instrument, an early harvest arrangement, is not yet in place.

Five Nigeria records have been subjected to full verification. Three are classed as direct FOCAC delivery (A1): zero-tariff treatment on 100% of tariff lines, the economic partnership framework and the joint agricultural laboratory. Two are better treated as plausibly attributable: the RMB200 million grant and cassava cooperation.

The zero-tariff treatment in force since 1 May 2026 is the most consequential direct outcome for Nigerian business. Chinese imports from Nigeria were already up 112% in January to April 2026, before the preference applied on 1 May, and growth continued after it took effect: imports rose 80% to US\$2.3 billion in the first half of 2026, with monthly growth above 40% in May and June. Because about 88% of Nigeria's exports to China already entered duty-free, the preference coincides with this continued growth rather than demonstrably driving it. But the preference is unilateral and time-bound: for Nigeria, as a non-LDC, it runs to 30 April 2028. Without an early harvest arrangement under the March 2026 framework, the window closes. The RMB200 million grant is verified as an announcement only, and cassava cooperation rests partly on programmes that predate the Summit.

5 Records verified substantive verification	3 Direct delivery (A1) linked to Beijing outcomes	2 Plausible (A2) linkage incomplete	Minimum Verified floor not a full inventory
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The trade window

Two trade instruments now shape Nigeria's position. The first, China's unilateral zero-tariff treatment, is already in force. The second, a negotiated early harvest arrangement under the March 2026 framework, is what would make that access permanent. Nigeria has the first but not the second. An early harvest arrangement is an interim, reciprocal trade deal under the framework agreement that locks in China's zero tariffs beyond the temporary window. Section 3 sets out the instruments and what to watch.

Priorities before the 2027 review

- 1. Seek full portfolio clarity.** Nigeria should seek clarity on the full portfolio of projects and financing attributable to the 2024 FOCAC commitments.
- 2. Close the early harvest before 2028.** Nigeria should open early harvest negotiations under the March 2026 framework without delay, with a mandate that protects ECOWAS obligations and sensitive industries, so that zero-tariff access does not lapse on 30 April 2028.
- 3. Enter 2027 with a national register.** Nigeria should enter the 2027 cycle with its own implementation register showing what was agreed, what was delivered, what remains outstanding and what new priorities should be advanced.

BOTTOM LINE

Nigeria has identifiable and verifiable FOCAC delivery, but the evidence base remains incomplete.

The strongest direct outcomes so far are zero-tariff access to China, the economic partnership framework and the operational joint agricultural laboratory. Nigerian exports to China are growing, a trend under way before the preference applied, but zero-tariff access is temporary until an early harvest arrangement is concluded. The RMB200 million grant requires project-level transparency, while cassava cooperation highlights the need to distinguish new commitments from long-running programmes.

SECTION 1

FOCAC in context

The Forum on China-Africa Cooperation (FOCAC) was established in Beijing in October 2000 as a platform for collective dialogue and practical cooperation between China and African countries. It has since developed into a recurring architecture of summits, ministerial conferences, senior officials meetings and country-level follow-up arrangements. As of 2026, its membership comprises China, 53 African countries that have diplomatic relations with China, and the African Union Commission.

2000 Founded in Beijing October 2000	53 + AUC African members plus the African Union Commission	10 Partnership actions Beijing Action Plan 2025-2027	RMB360bn Financial support over the three-year cycle
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FOCAC matters because it has become one of the principal institutional channels through which China and African states organise cooperation across trade, infrastructure, agriculture, health, industrialisation, education, science and technology, green development, financing and security. The framework is not a treaty organisation and it does not replace national development strategies. Its practical importance lies in the political commitments, financing windows, bilateral agreements, technical programmes and projects that are subsequently negotiated and implemented through participating governments and institutions.



Figure 1. Key milestones: from FOCAC's founding to the 2027 review point.

The 2024 Beijing Summit and the current cycle

The 2024 Beijing Summit adopted the Beijing Declaration and the FOCAC Beijing Action Plan for 2025-2027. The Action Plan is organised around ten partnership actions: mutual learning, trade prosperity, industrial chain cooperation, connectivity, development cooperation, health, agriculture and livelihoods, people-to-people exchanges, green development and common security.

Figure 2. The ten partnership actions of the FOCAC Beijing Action Plan (2025-2027).

01 Mutual learning	02 Trade prosperity	03 Industrial chain cooperation	04 Connectivity	05 Development cooperation
06 Health	07 Agriculture and livelihoods	08 People-to-people exchanges	09 Green development	10 Common security

China also announced RMB360 billion in financial support over the three-year cycle, comprising RMB210 billion in credit lines, RMB80 billion in assistance in various forms, and at least RMB70 billion in investment by Chinese companies. The current cycle will culminate in the 10th FOCAC Ministerial Conference in the Republic of the Congo in 2027, creating a clear review point for assessing what has moved from commitment into implementation and results.

RMB360bn financial support, FOCAC 2025-2027 cycle

RMB210bn	RMB80bn	RMB70bn+
Credit lines	Assistance in various forms	Investment by Chinese companies
58% of total	22% of total	19% of total

Figure 3. Composition of China's announced financial support for the 2025-2027 cycle.

What FOCAC could make possible for Africa

For Africa, the strategic value of FOCAC lies less in the headline scale of commitments than in how effectively African governments connect the framework to continental, regional and national priorities. The African Union's Agenda 2063 places particular emphasis on inclusive growth, infrastructure, industrialisation, agriculture and value addition, science and technology, human capital, regional integration and peace and security. These areas overlap substantially with the current FOCAC agenda.

Possibility for Africa	What it could mean in practice
Industrialisation and value chains	Use Chinese investment, industrial parks, manufacturing partnerships and supply-chain cooperation to expand African production, processing and exports rather than remain concentrated in raw-material supply.
Trade and market access	Convert tariff preferences and economic partnership arrangements into higher-value African exports, stronger standards compliance, logistics capability and more diversified trade baskets.
Infrastructure and regional integration	Align connectivity investments with PIDA, AfCFTA corridors, ports, railways, energy systems and digital infrastructure that lower the cost of moving goods, people and data across African markets.
Agriculture and food systems	Use demonstration centres, technology transfer, irrigation, mechanisation, processing and market access to raise productivity and build regional agro-industrial value chains.
Technology and knowledge transfer	Move beyond equipment acquisition towards joint laboratories, research partnerships, vocational training, digital capabilities, local maintenance and applied innovation.

Possibility for Africa	What it could mean in practice
Green transition	Channel cooperation into renewable energy, grid expansion, clean technologies, climate-resilient infrastructure and African participation in emerging green industries.
Development finance	Use grants, credit, equity, insurance and blended structures selectively, with stronger project preparation, transparency and fiscal discipline.

THE AFRICAN IMPLEMENTATION CHALLENGE

These possibilities are not automatic. The development value of FOCAC depends heavily on African agency: the quality of project preparation, negotiating capacity, alignment with national plans, transparency of financing terms, local content, technology absorption, regional coordination and the ability to measure results after assets are built or agreements are signed.

A credible African monitoring approach therefore needs to distinguish between announcements, signed agreements, financing commitments, implementation, operational use and verified results. It also needs to separate projects conceived before the 2024 Summit from genuinely additional commitments arising from the current cycle. Without these distinctions, activity can easily be mistaken for delivery.

THE CENTRAL QUESTION

The central question is therefore not simply how many China-Nigeria activities can be identified, but whether Nigeria is converting the current FOCAC window into measurable gains in productive capacity, exports, infrastructure, technology, skills and institutional capability.

The rest of this brief applies this test to Nigeria. Section 2 sets out the verified records, Section 3 the trade instruments that will shape the next phase, and Section 4 what the evidence means for policy and business.

SECTION 2

What has been delivered in Nigeria

5 records assessed in full against the PDIL method

Verified implementation picture

Initiative	Current position	Attribution	Grade	Assessment
Framework Agreement on Economic Partnership for Shared Development	Agreement	A1 Direct	A	Strong institutional outcome linked explicitly to implementation of the Beijing Summit
Zero-tariff treatment on 100% of tariff lines	Operational use	A1 Direct	A	In force since 1 May 2026 as the implementation of the FOCAC trade commitment; Chinese imports from Nigeria up 80% in H1 2026, a rise already under way before 1 May
China-Nigeria Joint Laboratory for Soil and Water Conservation and Agricultural Sustainable Development	Operational use	A1 Direct	B	Laboratory established and being used for joint research

Initiative	Current position	Attribution	Grade	Assessment
RMB200 million grant assistance	Announcement	A2 Plausible	A	Grant announced in August 2026, but project allocation, a signed agreement and disbursement remain undisclosed
Cassava production and processing demonstration	Implementation	A2 Plausible	A	Post-summit demonstration activity is reported, but the wider cooperation platform predates FOCAC 2024

Attribution: A1 direct FOCAC delivery; A2 plausibly attributable; A3 post-summit bilateral; A4 pre-existing; A5 disputed or unverified. Evidence grade: A independently corroborated to D insufficient. Full method in Annex B.

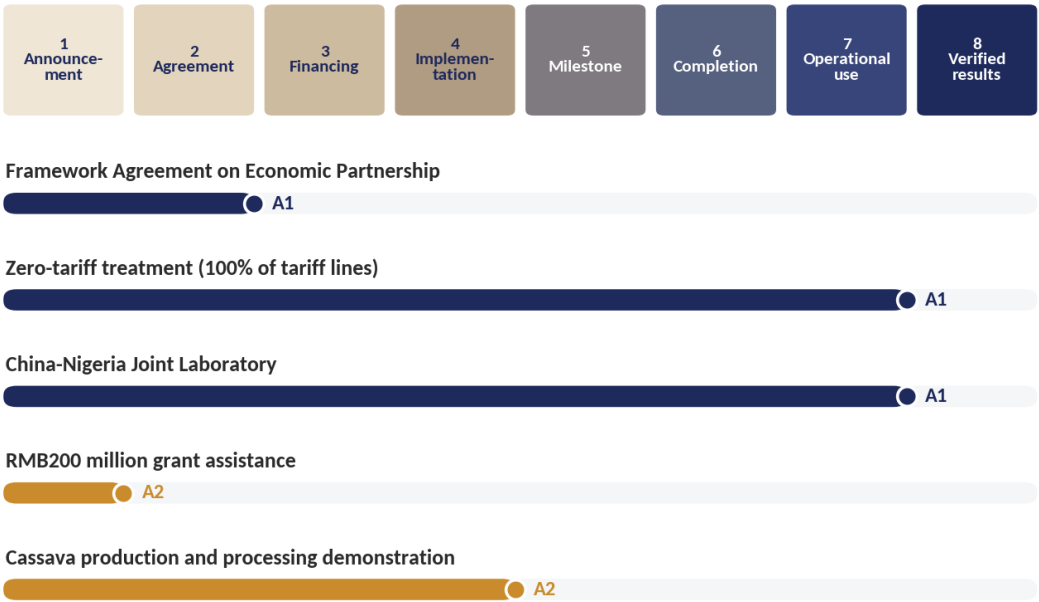


Figure 4. Where each verified Nigeria record sits on the delivery ladder at the verification cut-off.

1. Economic partnership framework

SIGNED	DELIVERY STAGE	ATTRIBUTION	EVIDENCE GRADE
26 March 2026	Agreement	A1 Direct	A

Nigeria and China signed the Framework Agreement on Economic Partnership for Shared Development on 26 March 2026. China's Ministry of Commerce describes the signing as "a crucial step in implementing" the outcomes of the Beijing Summit of the Forum on China-Africa Cooperation, which is the documentary basis for the A1 classification.

The framework covers areas including manufacturing, agriculture, trade facilitation, investment and broader economic cooperation. Its significance lies in the fact that it provides an institutional mechanism through which Nigeria could translate the wider FOCAC trade commitments into sector-specific market access, investment and production opportunities.

At present, however, the framework should be treated as an enabling instrument rather than a completed economic outcome. The next phase of monitoring should therefore focus on the specific agreements, tariff arrangements, investment projects and sector programmes developed under it.

CURRENT ASSESSMENT

Direct FOCAC delivery, with implementation outcomes still to emerge.

Evidence for this record

- MOFCOM, signing by Minister Wang Wentao, 26 March 2026: wangwentao2.mofcom.gov.cn/Events/art/2026/art_21727baf278f476baadc5815a2f27571.html
- Voice of Nigeria, 27 March 2026: von.gov.ng/nigeria-china-sign-pact-to-deepen-economic-cooperation/
- Vanguard, Chinese Consul-General, 28 September 2026: www.vanguardngr.com/2026/09/nigerias-manufacturing-upgrade-tops-chinas-economic-pact-consul-general/

2. Zero-tariff treatment on 100% of tariff lines

IN FORCE	VALID TO	DELIVERY STAGE	ATTRIBUTION	EVIDENCE GRADE
1 May 2026	30 April 2028	Operational use	A1 Direct	A

China's zero-tariff treatment for all 53 African countries with which it has diplomatic relations took effect on 1 May 2026, covering 100% of tariff lines (natural rubber excluded; quota goods duty-free within quota only). It implements the trade prosperity commitment of the 2024 Beijing Summit, extended from least developed countries to all African partners. Nigeria, as a non-LDC, benefits until 30 April 2028.

Nigerian exports to China were rising before the preference applied. China's imports from Nigeria were already up 112% in January to April 2026 (China Customs data), before the preference applied on 1 May, and growth continued after it took effect: imports rose 80% to US\$2.3 billion in the first half of 2026, with monthly growth above 40% in May and June, and total bilateral trade reached US\$18 billion (up 35%) in H1 2026 (Ambassador Yu Dunhai, 14 August 2026). Products cited by Nigerian officials and the Chinese Embassy include sesame and liquefied petroleum gas (BusinessDay, August 2026). Because roughly 88% of Nigeria's exports to China already entered duty-free, part of this growth reflects commodity prices rather than the tariff change itself.

The measure is unilateral and time-bound. Its lasting value depends on Nigeria converting it into a negotiated early harvest arrangement, and on exporters meeting China's rules of origin (a 40% regional value content test for processed goods) and sanitary and phytosanitary requirements.

CURRENT ASSESSMENT

Direct FOCAC delivery and operational; exports to China kept growing after it took effect, but that growth predates the preference, which expires in April 2028 without an early harvest arrangement.

Evidence for this record

- State Council of China, 28 April 2026: english.www.gov.cn/news/202604/28/content_WS69f0a1d7c6d00ca5f9a0aad0.html
- Embassy of China in Nigeria, speech by Ambassador Yu Dunhai, 14 August 2026: ng.china-embassy.gov.cn/eng/zngx/cne/202608/t20260815_12004633.htm
- BusinessDay, August 2026: businessday.ng/news/article/china-imports-from-nigeria-surge-80-to-2-3bn-under-zero-tariff-regime/
- China Customs data via Huaon, imports from Nigeria, January to April 2026: www.huaon.com/channel/tradedata/1173732.html

3. China-Nigeria Joint Laboratory

PARTNERS	DELIVERY STAGE	ATTRIBUTION	EVIDENCE GRADE
University of Ibadan + CAAS (Institute of Environment and Sustainable Development in Agriculture)	Operational use	A1 Direct	B

The China-Nigeria Joint Laboratory for Soil and Water Conservation and Agricultural Sustainable Development provides one of the strongest examples of FOCAC commitments moving beyond announcement into actual use.

Official follow-up reporting records the establishment of the laboratory, while subsequent research reporting shows that joint work involving the University of Ibadan and Chinese research institutions was being undertaken through the platform by 2026.

The importance of this initiative lies less in the physical establishment of the laboratory and more in whether it generates sustained Nigerian research capacity, locally relevant technology, practical agricultural applications and measurable contribution to soil, water and agricultural productivity challenges.

CURRENT ASSESSMENT

Direct FOCAC delivery and operational, although evidence of development outcomes remains limited.

Evidence for this record

- Ministry of Foreign Affairs of China, FOCAC follow-up outcomes, 11 June 2025: www.mfa.gov.cn/eng/wjbzhd/202506/t20250611_11646041.html
- China-Africa Agricultural S&T Innovation Alliance platform database: caastia.org/Data_base/Platforms/index.htm

4. RMB200 million grant assistance

VALUE	ANNOUNCED	DELIVERY STAGE	ATTRIBUTION	EVIDENCE GRADE
RMB200 million	14 August 2026	Announcement	A2 Plausible	A

China has confirmed a decision to provide RMB200 million in grant assistance to Nigeria for projects to be jointly identified and implemented. Ambassador Yu Dunhai announced the grant to the Ministry of Foreign Affairs on 14 August 2026; no signed grant agreement had been published by the verification cut-off, so the record sits at announcement stage.

This is a significant announced pledge, but the available evidence does not yet establish the individual projects that will be funded, the responsible implementing institutions, the allocation across sectors, the disbursement schedule or the expected development results.

On attribution, the grant is classed A2. It was announced at a meeting that both sides framed as implementing the outcomes of the 2024 FOCAC Beijing Summit, which distinguishes it from grants whose signing statement made no FOCAC reference (such as Kenya's RMB100 million grant, classed A3 in Volume 2). But no published document yet ties this grant to a specific Beijing Action Plan commitment, so it does not meet the A1 test. It should not be treated as delivered expenditure until a signed agreement and project list are published.

CURRENT ASSESSMENT

Announced, not yet signed. Classed A2 because the announcement was framed as implementing the 2024 Summit outcomes; no grant-specific link to an Action Plan commitment has yet been published.

Evidence for this record

- **Voice of Nigeria, 14 August 2026:** von.gov.ng/nigeria-china-deepen-development-cooperation/
- **Premium Times, August 2026:** www.premiumtimesng.com/foreign/902810-china-to-provide-rmb-200-million-grant-assistance-to-nigeria-as-diplomatic-relations-strengthen.html

5. Cassava production and processing cooperation

FOCUS	DELIVERY STAGE	ATTRIBUTION	EVIDENCE GRADE
Green, efficient production and processing	Implementation	A2 Plausible	A

Official FOCAC follow-up reporting indicates that technical demonstration of green and efficient cassava production and processing has commenced in Nigeria. In June 2026, the Chinese Academy of Tropical Agricultural Sciences (CATAS) delivered full-cycle cassava mechanisation equipment to the National Root Crops Research Institute (NRCRI) in Umudike.

This aligns closely with the agricultural modernisation and livelihoods commitments contained within the current FOCAC framework. However, China-Nigeria cassava cooperation and demonstration activities were already developing before the September 2024 Summit.

On attribution, the demonstration itself is listed in China's June 2025 FOCAC follow-up outcomes, as it is for Kenya, and the programme is classed A2 in both volumes for different reasons. In Nigeria, cassava cooperation between CATAS and the National Root Crops Research Institute predates the Summit, as Xinhua reported in July 2024, and the current activity cannot yet be separated from that earlier work; the monitoring question is what new activity, technology, coverage or processing capacity the 2024 commitments have added. In Kenya, the reason is that no Kenyan host source yet confirms the activity (see Volume 2).

CURRENT ASSESSMENT

Credible post-summit implementation activity, but additionality has not yet been sufficiently isolated to classify the entire initiative as new FOCAC delivery.

Evidence for this record

- **Ministry of Foreign Affairs of China, FOCAC follow-up outcomes, 11 June 2025:** www.mfa.gov.cn/eng/wjbzhd/202506/t20250611_11646041.html
- **BusinessDay, CATAS equipment to NRCRI Umudike, July 2026:** businessday.ng/news/article/china-delivers-first-full-cycle-cassava-mechanisation-equipment-to-nigeria-boosts-food-security-drive/
- **Xinhua, China-Nigeria cassava partnership, 27 July 2024:** english.news.cn/20240727/91d94598d76840e7b0d12e730c040915/c.html

SECTION 3

The zero-tariff window and the early harvest question

Two trade instruments now shape Nigeria's position. The first, China's unilateral zero-tariff treatment, is already in force. The second, a negotiated early harvest arrangement under the March 2026 framework, is what would make that access permanent. Nigeria has the first but not the second.

Kenya signed its early harvest arrangement on 24 March 2026 and it entered into force on 1 May 2026. South Africa signed its framework in February 2026 and is negotiating. In all, 40 African countries had signed framework agreements by 9 September 2026 (Xinhua; Ambassador Yu cited 38 in August). China's Ambassador also said in August 2026 that China looks forward to finalising early harvest arrangements with more partners, including Nigeria.

Instrument	Status at cut-off	What it means
Zero-tariff treatment (unilateral)	In force since 1 May 2026	100% of tariff lines (natural rubber excluded; quota goods duty-free within quota only); for Nigeria, valid to 30 April 2028
Framework Agreement on Economic Partnership for Shared Development	Signed 26 March 2026	Platform for negotiation; creates no tariff commitment by itself
Early harvest arrangement	Not concluded; negotiations not publicly opened	Would bind zero tariffs beyond April 2028 in exchange for Nigerian market-opening commitments
Rules of origin (GACC)	In force	40% regional value content for processed goods; decides who actually benefits

WHAT IS AN EARLY HARVEST ARRANGEMENT?

China's trade offer to Africa moves in steps. First, China grants zero tariffs unilaterally: to least developed countries since 1 December 2024, and to the other 20 African partners from 1 May 2026 to 30 April 2028. Second, a country signs a framework agreement on economic partnership for shared development, which sets the agenda but changes no tariffs. Third, it negotiates an early harvest arrangement: a reciprocal deal that binds China's zero tariffs on the country's exports beyond 2028, usually in return for the African partner opening its own market to an agreed list of Chinese goods. Chapters on services, investment and standards follow later.

Where Nigeria stands: framework signed on 26 March 2026; no early harvest arrangement concluded and negotiations not publicly opened. Without one, Nigeria's zero-tariff access ends on 30 April 2028.

WHAT TO WATCH

The window is 19 months. The decisions that matter are the negotiating mandate, the treatment of ECOWAS common external tariff obligations and sensitive industries, and whether Nigerian exporters can meet origin and SPS rules at scale. See the PDIL CAEPSD Explainer and Rules of Origin Policy Brief.

SECTION 4

What the Nigeria evidence tells us

Nigeria's experience illustrates an important feature of FOCAC implementation. Delivery does not occur only through large infrastructure projects. It increasingly takes the form of economic frameworks, grants, technical cooperation, research platforms and sector-specific demonstration programmes.

Economic frameworks	Grants	Technical cooperation	Research platforms	Demonstration programmes
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Figure 5. The forms FOCAC delivery is taking in Nigeria, beyond large infrastructure.

The evidence also shows why implementation monitoring must go beyond counting announcements. A signed agreement, a financing commitment, an operational research facility and an agricultural demonstration programme represent different levels of delivery and should not be combined into a single undifferentiated measure of progress.

Nigeria also presents a significant opportunity for deeper FOCAC engagement. The economic partnership framework could become particularly important if it produces concrete arrangements around market access, industrial investment, agricultural upgrading, value-chain development and technology transfer.

Key evidence gaps

#	Area	Open question
1	RMB200 million grant	Which projects will be financed, when will funds be disbursed, and which Nigerian institutions will implement them?
2	Zero-tariff utilisation	Which Nigerian products and firms are using the preference, what share of growth is tariff-driven rather than price-driven, and which exports fail on rules of origin or SPS?
3	Framework and early harvest	When will Nigeria open early harvest negotiations, what is its offer and red lines, and how will ECOWAS common external tariff obligations be handled?
4	Joint laboratory	What research outputs, technologies, Nigerian researchers, funding commitments and agricultural applications are emerging?
5	Cassava cooperation	What portion of current activity is genuinely additional to programmes that existed before September 2024?
6	Wider Nigerian portfolio	Are there additional Nigerian projects under connectivity, health, green development, industrial-chain, training and livelihood commitments that have not yet been publicly reconciled?

Implications for the 2027 FOCAC cycle

Nigeria's position ahead of the 2027 FOCAC review should increasingly shift from documenting commitments to demonstrating utilisation and negotiating from evidence.

FIRST Seek full portfolio clarity Nigeria should seek clarity on the full portfolio of projects and financing attributable to the 2024 FOCAC commitments. The RMB200 million grant provides a starting point, but it is unlikely to represent the full extent of the relationship.	SECOND Close the early harvest before 2028 Nigeria should open early harvest negotiations under the March 2026 framework without delay, with a mandate that protects ECOWAS obligations and sensitive industries, so that zero-tariff access does not lapse on 30 April 2028.	THIRD Enter 2027 with a national register Nigeria should enter the 2027 cycle with its own implementation register showing what was agreed, what was delivered, what remains outstanding and what new priorities should be advanced.
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ANNEX A

The wider China-Nigeria register

Beyond the five records subjected to full verification, PDIL screened 13 further China-Nigeria activities since September 2024 against the same method. They are shown here to give a fuller picture of the relationship; each is graded, but they have not all been subjected to the full verification applied to the five core records.

WHAT THE WIDER REGISTER SHOWS

Direct FOCAC delivery is concentrated in political agreements, market-access instruments and smaller cooperation projects. The largest commercial assets in the relationship (lithium processing, power transmission, the Kano-Kaduna railway loan and the Lekki port road package) are either bilateral commercial deals (A3) or continuations of earlier programmes (A4).

This is the core finding for decision-makers: much of what is presented as FOCAC delivery is real cooperation, but only part of it is new delivery under the 2024 commitments.

Record	Date	Stage	Attribution	Grade
Comprehensive Strategic Partnership and joint statement	Sep 2024	Agreement	A1	A
Summit instruments: BRI cooperation plan, nuclear energy, human resources, media, CMG-NTA	Sep 2024	Agreement	A1	A
Nigeria-China Strategic Partnership (NCSP) office established	Sep 2024	Implementation	A2	A
GACC access for Nigerian peanuts (Announcement No. 115/2024)	Sep 2024	Agreement	A2	B
CBN-PBoC CNY15bn currency swap renewal	Dec 2024	Agreement	A4	A
CDB EUR245m loan, Kano-Kaduna railway (CCECC)	Jan 2025	Financing; implementation	A4	A
CMEC US\$329m transmission contract (Presidential Power Initiative)	Apr 2025	Agreement	A3	C
China Exim US\$652m Lekki Port evacuation road package (FEC approval)	May 2025	Announcement (FEC approval; loan not yet signed)	A3	C
Chinese Embassy statement on Ten Partnership Actions with Nigeria	May 2025	Announcement	A1	C
Insulin plant agreement (NBRDA and Shanghai Haiqi)	Sep 2025	Agreement	A3	A
Small Hydro Power Centre of Excellence, University of Abuja (UNIDO, China fund)	Mar 2026	Implementation	A1	B
Endo lithium processing plant, Nasarawa (Diamond New Energy, Jiuling, Canmax)	Jul 2026	Operational use	A3	A
Wild aquatic products inspection and quarantine protocol	Aug 2026	Agreement	A1	C

ANNEX B | METHOD

How to read this brief

This brief separates delivery status from FOCAC attribution. A1 means the available evidence directly links an activity to the 2024 Beijing Summit outcomes. A2 means the activity is plausibly connected but the direct documentary link is incomplete. A3 captures post-summit bilateral activity without demonstrated FOCAC attribution. A4 covers cooperation that began before September 2024 and continued or reached milestones afterwards. These attribution classes do not replace implementation status: an activity may be directly attributable to FOCAC but still only be at agreement, financing or implementation stage.

A1 Direct FOCAC delivery	A2 Plausibly attributable	A3 Post-summit bilateral	A4 Pre-existing activity	A5 Disputed or unverified
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Weaker attribution →

FOCAC Intelligence tests every record against three questions. The method is deliberately conservative: it separates commitment, financing, implementation, utilisation and results, and records gaps rather than inferring progress.

#	Question	How it is tested
1	Is it a FOCAC commitment?	Records are assessed against the Beijing Action Plan 2025-2027 and the September 2024 Summit commitments, not counted as FOCAC delivery simply because they occurred after the Summit.
2	How far has it progressed?	Each record is placed on the eight-stage delivery ladder below. An agreement is not implementation, a financing commitment is not disbursement, and a completed asset is not a development result.
3	How strong is the evidence?	Evidence comes from official Chinese and Nigerian sources, corroborated by credible secondary reporting, and is graded A to D. Attribution is scored A1 to A5.

01 Announcement	02 Agreement	03 Financing	04 Implementation	05 Milestone	06 Completion	07 Operational use	08 Verified results
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A Independently corroborated	B Official documentary	C Credible but incomplete	D Insufficient
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The available public record remains incomplete. Important areas of China-Nigeria cooperation may not yet appear in the verified register because project-level information, financing detail or explicit FOCAC attribution has not been made publicly available. The figures in this brief should therefore be read as a verified minimum, rather than as a complete inventory of all China-Nigeria cooperation under the current FOCAC cycle.

ANNEX C

Glossary

Term	Meaning
FOCAC	Forum on China-Africa Cooperation, founded in 2000

Term	Meaning
Beijing Action Plan	FOCAC plan for 2025-2027 adopted at the September 2024 Beijing Summit
CAEPSD	China-Africa Economic Partnership for Shared Development: framework agreements plus early harvest arrangements
Early harvest	Interim arrangement that binds zero tariffs before a fuller agreement
CATAS	Chinese Academy of Tropical Agricultural Sciences
ECOWAS CET	ECOWAS Common External Tariff, the common tariff schedule Nigeria applies as an ECOWAS member
GACC	General Administration of Customs of China
LDC	Least developed country, a United Nations category; Nigeria is not an LDC
MOFCOM	Ministry of Commerce of the People's Republic of China
NCSP	Nigeria-China Strategic Partnership office, established in September 2024
NRCRI	National Root Crops Research Institute, Umudike
RVC	Regional value content: the share of a product's value that must originate locally for it to qualify for preferential treatment
SPS	Sanitary and phytosanitary measures (food safety, animal and plant health)
A1 to A5	Attribution classes, from direct FOCAC delivery (A1) to disputed or unverified (A5)
Grades A to D	Evidence quality, from independently corroborated (A) to insufficient (D)

EVIDENCE BASE

Selected sources

- Beijing Action Plan (2025-2027): www.fmprc.gov.cn/mfa_eng/zy/gb/202409/t20240905_11485719.html
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