



FOCAC INTELLIGENCE

Africa Country Series | Volume 2 | September 2026

Kenya Country Brief

Verified implementation, strategic opportunities and the road to 2027

AT A GLANCE

4

Kenya records verified

1

Direct FOCAC delivery (A1)

2 + 1

Plausibly attributable (A2) and post-summit bilateral (A3)

100%

China's zero-tariff treatment across 100% of tariff lines for Kenyan exports, under the Early Harvest Arrangement



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 Kenya, 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 Kenya matters in this wider picture

Kenya is East Africa's commercial hub and the gateway economy of the East African Community, with one of the deepest infrastructure relationships with China on the continent, anchored by the Mombasa-Nairobi Standard Gauge Railway. It is also one of the first African countries whose early harvest arrangement with China has entered into force, which makes it the test case for whether FOCAC trade commitments translate into export gains.

What we found

Kenya's verified post-Beijing record covers trade access, connectivity, agriculture and grant cooperation. Four records have been subjected to full verification. One qualifies as direct 2024 FOCAC delivery, two are plausibly attributable, and one is best treated as post-summit bilateral cooperation without sufficient evidence of direct FOCAC attribution.

The direct FOCAC case is the Early Harvest Arrangement on economic partnership, in force since 1 May 2026. The cassava production and processing demonstration is listed in China's June 2025 FOCAC follow-up outcomes, but no Kenyan host source yet confirms the activity, so it is classed as plausibly attributable. The Standard Gauge Railway extension toward Kisumu and Malaba is under implementation, with reported delays, and strategically important, but the strongest available evidence does not yet tie this specific phase directly to a numbered FOCAC commitment. A separate RMB100 million grant for hospital and training-college upgrades is verified, but remains a bilateral cooperation item for attribution purposes.

4	1	2	1
Records verified	Direct delivery (A1)	Plausible (A2)	Bilateral (A3)
full verification	Early Harvest Arrangement	SGR extension; cassava	RMB100m grant

The trade window

Kenya is the clearest African case of the full FOCAC trade sequence: a framework, a signed early harvest arrangement, and entry into force. The arrangement was signed on 24 March 2026 and entered into force on 1 May 2026, the same day China's unilateral zero-tariff treatment was extended to all 53 African countries. 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. Test the Early Harvest Arrangement.** Kenya can use the Early Harvest Arrangement as a practical test of whether FOCAC trade commitments can translate into export diversification.
- 2. Treat the SGR as a corridor.** The SGR extension should be monitored as a regional economic corridor rather than only a construction project.
- 3. Keep a reconciled register.** Kenya should maintain its own reconciled register of FOCAC-linked commitments, bilateral cooperation and legacy projects.

BOTTOM LINE

Kenya has verifiable post-Beijing delivery, but the pattern is more nuanced than a simple count of projects.

One of the four records subjected to full verification qualifies as direct FOCAC delivery, two are plausibly attributable, and one is verified bilateral cooperation without sufficient direct FOCAC linkage.

SECTION 1

FOCAC in context

The Forum on China-Africa Cooperation (FOCAC), established in 2000, is the principal intergovernmental platform through which China and African countries organise political dialogue and practical cooperation. Its architecture combines summits, ministerial conferences, senior officials meetings and bilateral follow-up mechanisms, with commitments normally organised through multi-year action plans.

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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For African countries, the significance of FOCAC is not only the scale of announced finance. Its wider value lies in the possibility of using a recurring political and economic platform to connect infrastructure, industrialisation, market access, technology, skills, agriculture and public-sector cooperation to national development priorities.



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

The 2024 Beijing Summit and the current cycle

The September 2024 Beijing Summit opened the current implementation cycle. The Beijing Action Plan for 2025-2027 sets out ten partnership actions covering mutual learning, trade prosperity, industrial-chain cooperation, connectivity, development cooperation, health, agriculture and livelihoods, people-to-people exchanges, green development and common security. China also announced RMB360 billion in financial support over three years, comprising RMB210 billion in credit lines, RMB80 billion in different forms of assistance and at least RMB70 billion in investment by Chinese companies.

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

RMB360bn financial support, FOCAC 2025-2027 cycle**Figure 3.** Composition of China's announced financial support for the 2025-2027 cycle.

What FOCAC could make possible for Africa

The current cycle creates several strategic possibilities for African countries if commitments are converted into coherent national programmes rather than treated as stand-alone projects.

Possibility for Africa	What it could mean in practice
Industrialisation and value chains	FOCAC can support a move from infrastructure-led cooperation toward productive investment, manufacturing, special economic zones, supplier development and regional value chains. The test is whether African firms, workers and institutions capture a growing share of the value created.
Trade and market access	Expanded zero-tariff treatment and economic-partnership arrangements can improve access to the Chinese market. Their development value will depend on rules of origin, standards compliance, logistics, export capability and whether African countries can diversify beyond primary commodities.
Connectivity and regional integration	Transport, logistics, energy and digital infrastructure can strengthen AfCFTA implementation where projects are selected as corridors and productive systems rather than isolated national assets.
Agriculture and food systems	Technology demonstration, irrigation, mechanisation, processing, research collaboration and market access can raise productivity and value addition if linked to national extension systems, agro-processing and domestic value chains.
Technology, skills and institutional capability	Joint laboratories, vocational institutions, training programmes and digital cooperation can create durable value where knowledge transfer, local staffing, research outputs and institutional use are tracked.
Green development and new finance models	The shift toward renewable energy, public-private partnerships, equity participation and revenue-backed infrastructure could widen financing options, although it also raises questions around contingent liabilities, concession terms, tariff structures and public oversight.

THE DELIVERY TEST

These opportunities are not automatic. African governments still need credible project pipelines, transparent financing arrangements, strong negotiation capability, local-content strategies, implementation discipline and independent monitoring of results. FOCAC therefore works best when it is treated as a delivery framework rather than a sequence of summit announcements.

THE CENTRAL QUESTION

The central question is whether Kenya can convert negotiated market access and new infrastructure into diversified exports and manageable public liabilities, rather than a wider bilateral deficit.

The rest of this brief applies this test to Kenya. 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 Kenya

4 records assessed in full against the PDIL method

Verified implementation picture

Initiative	Current position	Attribution	Grade	Assessment
Early Harvest Arrangement for Economic Partnership	Operational use (in force 1 May 2026)	A1 Direct	A	MOFCOM explicitly describes the March 2026 arrangement as implementation of Beijing Summit outcomes and a step toward zero-tariff market access.
Naivasha-Kisumu-Malaba SGR extension	Implementation underway	A2 Plausible	B	Construction is confirmed but reported as delayed (Kenyans.co.ke, August 2026), and direct documentary linkage of this phase to a specific 2024 FOCAC commitment remains incomplete.
RMB100 million economic and technical cooperation grant	Agreement signed	A3 Bilateral	A	Grant agreement is verified and linked to named health and training facilities, but no specific 2024 FOCAC attribution has been established.
Cassava production and processing demonstration	Implementation underway	A2 Plausible	B	Listed in China's June 2025 FOCAC follow-up outcomes as started in Kenya, but no Kenyan host source yet confirms the activity.

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 A.

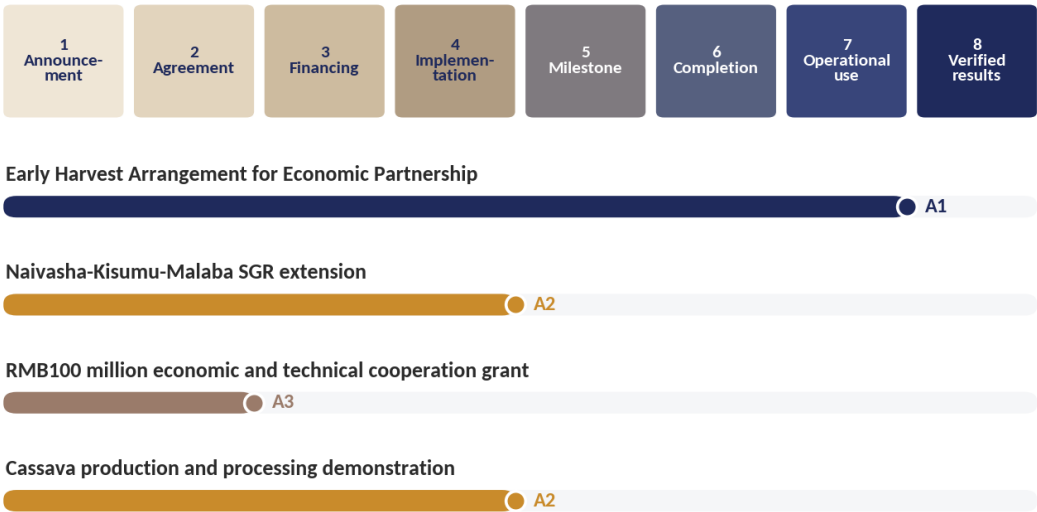


Figure 4. Where each verified Kenya record sits on the delivery ladder at the verification cut-off.

1. Early Harvest Arrangement for Economic Partnership

DATES	COVERAGE	DELIVERY STAGE	ATTRIBUTION	EVIDENCE GRADE
Signed 24 March 2026; in force 1 May 2026	100% of tariff lines	Operational use	A1 Direct	A

China and Kenya signed the Early Harvest Arrangement of the Agreement on Economic Partnership for Shared Development on 24 March 2026. China's Ministry of Commerce explicitly identifies the arrangement as an important initiative for implementing the outcomes of the FOCAC Beijing Summit.

Under the arrangement, China committed to zero-tariff treatment across 100% of tariff lines for Kenya, while Kenya is expected to further open its market to Chinese products. The arrangement therefore provides a direct institutional route from FOCAC's Trade Prosperity commitments to bilateral market access.

The arrangement took effect on 1 May 2026, the same day China's unilateral zero-tariff treatment was extended to all 53 African countries. Kenya's own market-opening commitments have not been published.

The next analytical question is utilisation. The value of the arrangement will depend on product coverage, rules of origin, standards compliance, firm-level awareness, logistics, and the extent to which Kenyan producers can convert tariff preferences into sustained export growth and diversification.

CURRENT ASSESSMENT

Direct FOCAC delivery, A1. Operational use: the arrangement has been in force since 1 May 2026; utilisation and trade-response outcomes are still to be demonstrated.

Evidence for this record

- **MOFCOM, March 2026:** english.mofcom.gov.cn/News/SignificantNews/art/2026/art_1c88b82b7e254a4796c176211211cf58.html
- **Kenya State Department for Trade:** www.trade.go.ke/kenya-advances-export-growth-china-opens-market-through-zero-tariff-access
- **Dawan, entry into force:** www.dawan.africa/news/kenya-eyes-china-breakthrough-as-zero-tariff-deal-takes-effect

2. Naivasha-Kisumu-Malaba Standard Gauge Railway extension

CONSTRUCTION LAUNCHED	CONTRACTORS	DELIVERY STAGE	ATTRIBUTION	EVIDENCE GRADE
March 2026	CCCC and CRBC	Implementation (reported delays)	A2 Plausible	B

Kenya launched construction of the Naivasha-Kisumu-Malaba Standard Gauge Railway extension in March 2026. The project is intended to extend the SGR toward western Kenya and the Uganda border, strengthening Kenya's role as a transport and logistics corridor for East and Central Africa. Kenyans.co.ke reported in August 2026 that construction appears delayed: implementation is confirmed, but progress is behind schedule as reported.

The project is strategically consistent with FOCAC's connectivity agenda and forms part of deepened post-summit China-Kenya infrastructure cooperation. However, the strongest host-country evidence reviewed for this brief confirms construction and bilateral cooperation without explicitly linking this specific SGR phase to a numbered Beijing Action Plan commitment.

The project should therefore be monitored not only for construction progress, but for its financing model, contingent public liabilities, contractor arrangements, regional interoperability, freight utilisation, local content and the distinction between Chinese involvement in the Kenyan section and financing arrangements elsewhere along the regional corridor.

CURRENT ASSESSMENT

Implementation verified, with reported delays; FOCAC attribution remains A2, plausibly attributable.

Evidence for this record

- Kenya Ministry of Roads and Transport: www.transport.go.ke/node/741
- Capital FM, 19 March 2026: capitalfm.africa/ruto-breaks-ground-on-sh549bn-naivasha-malaba-sgr-extension/
- Kenyans.co.ke, construction status, August 2026: www.kenyans.co.ke/news/125794-kenya-railways-explains-why-construction-naivasha-kisumu-sgr-appears-delayed

3. RMB100 million economic and technical cooperation grant

SIGNED	VALUE	DELIVERY STAGE	ATtribution	EVIDENCE GRADE
27 March 2025	RMB100m (approx. KSh1.8bn)	Agreement	A3 Bilateral	A

Kenya's National Treasury signed a RMB100 million grant agreement with China on 27 March 2025. The Treasury states that the grant, valued at approximately KSh1.8 billion at the time of signing, is intended to support upgrades to several hospitals and Kaimosi Farmers Training College.

The grant is therefore a clear and verifiable example of post-summit China-Kenya development cooperation. However, the Treasury's signing statement makes no reference to FOCAC or the Beijing Summit, and its appearance in FOCAC news coverage does not by itself link it to a specific commitment. This is the difference from Nigeria's RMB200 million grant, which was announced at a meeting both sides framed as implementing the 2024 Summit outcomes and is therefore classed A2 in Volume 1.

For FOCAC Intelligence purposes, it is therefore more accurate to retain the activity as A3 until stronger documentary attribution emerges. Future monitoring should track project selection, procurement, disbursement, works completion and operational results at the beneficiary facilities.

CURRENT ASSESSMENT

Verified bilateral grant agreement, A3. Significant cooperation, but not yet counted as direct 2024 FOCAC delivery.

Evidence for this record

- Kenya National Treasury: newsite.treasury.go.ke/signing-ceremony-agreement-economic-and-technical-cooperation-provision-grant-amounting-rmb-100
- FOCAC.org, 1 April 2025: www.focac.org.cn/eng/zfgx_4/jmh/202504/t20250401_11586769.htm

4. Cassava production and processing demonstration

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

China's June 2025 FOCAC follow-up outcomes state that technical demonstration of green and efficient cassava production and processing started in Kenya. The activity corresponds to the agriculture and livelihoods commitments in the Beijing Action Plan, which include promotion of cassava varieties and production technologies.

The public record is thin on implementation detail, including demonstration locations, Kenyan counterpart institutions, numbers of farmers reached, processing technologies transferred and measurable productivity or income effects.

The next step for monitoring is therefore to move from confirming that the demonstration exists to establishing what it is delivering and whether it is connected to Kenyan extension services, agro-processing, domestic value chains and farmer organisations.

On attribution, the demonstration is classed A2. It is listed in China's June 2025 FOCAC follow-up outcomes, but no Kenyan host source yet confirms the activity. The same programme is also classed A2 in Nigeria (Volume 1), for a different reason: there, cassava cooperation with China is documented before the Summit. If a Kenyan host source confirms the demonstration, this record will move to A1.

CURRENT ASSESSMENT

Plausibly attributable, A2. Listed in China's FOCAC follow-up outcomes; Kenyan host confirmation, results and operational detail remain outstanding.

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

SECTION 3

The zero-tariff window and the early harvest arrangement

Kenya is the clearest African case of the full FOCAC trade sequence: a framework, a signed early harvest arrangement, and entry into force. The arrangement was signed on 24 March 2026 and entered into force on 1 May 2026, the same day China's unilateral zero-tariff treatment was extended to all 53 African countries.

The difference matters. For non-LDC partners without an early harvest arrangement, such as Nigeria, the unilateral preference runs to 30 April 2028. Kenya's access rests on a negotiated instrument. Because it is a negotiated instrument, Kenya's access does not depend on the unilateral preference that ends on 30 April 2028 for non-LDCs, although the published record does not state its duration. What Kenya conceded in return has not been published.

Instrument	Status at cut-off	What it means
Zero-tariff treatment (unilateral)	In force since 1 May 2026	100% of tariff lines, extended to all 53 African countries

Instrument	Status at cut-off	What it means
Agreement on Economic Partnership for Shared Development (framework)	Early harvest concluded under it; framework text not published	The negotiated basis for the arrangement
Early Harvest Arrangement for Economic Partnership	Signed 24 March 2026; in force 1 May 2026	Negotiated zero-tariff access on 100% of tariff lines
Kenya's market-opening commitments	Not published	The reciprocal side of the bargain; needed to judge the deal
EAC common external tariff	Applies	Constrains what Kenya can offer bilaterally

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 Kenya stands: early harvest arrangement signed on 24 March 2026 and in force since 1 May 2026, one of the first in Africa. Kenya's own market-opening commitments have not been published.

WHAT TO WATCH

The test now is utilisation: which Kenyan products are claiming the preference, whether exports diversify beyond tea, avocado and minerals, and how Kenya's concessions interact with EAC obligations.

SECTION 4

What the Kenya evidence tells us

Kenya is emerging as an important test case for the changing character of China-Africa cooperation. The trade arrangement demonstrates a shift toward institutionalised market access, while the SGR extension points to continued infrastructure engagement under financing structures that may differ from the earlier sovereign-loan model.

RELEVANCE IS NOT ATTRIBUTION

The evidence also reinforces the need to separate strategic relevance from formal FOCAC attribution. A project may be highly significant to China-Kenya cooperation and still not qualify as direct delivery of a 2024 FOCAC commitment. Conversely, a smaller trade instrument may carry a stronger documentary FOCAC link than a much larger infrastructure project.

This distinction makes the monitoring framework more credible and helps identify what Kenya should carry into the 2027 review: evidence of delivery, unresolved financing questions, utilisation of new market-access instruments and gaps between formal commitments and measurable economic results.

Key evidence gaps

#	Area	Open question
1	Trade arrangement	The arrangement took effect on 1 May 2026. Which products are benefiting, what rules of origin apply, what has Kenya conceded in return, and what is the emerging export response? Early data show avocado exports to China up 63% and coffee up 140% by volume in May to August 2026, but this growth cannot yet be attributed to the arrangement rather than to the unilateral preference or to prices; the trade response remains to be demonstrated.
2	SGR extension	What is the final financing structure, which Chinese institutions are financing or investing, what liabilities sit with the Kenyan state, and what is the confirmed construction schedule given the reported delays?
3	RMB100 million grant	What is the facility-by-facility allocation, procurement status, disbursement profile and implementation schedule?
4	Cassava demonstration	Which Kenyan host institution can confirm the demonstration, where are the sites, how many producers are involved, and what technologies or productivity gains can be demonstrated?
5	Wider Kenya portfolio	Which additional connectivity, green-development, industrial-chain, training and health activities can be directly reconciled against the 2024 Beijing commitments?

Implications for the 2027 FOCAC cycle

Kenya enters the final year of the current FOCAC cycle with a potentially important combination of market-access reform, infrastructure expansion and sector-level cooperation. The next phase should focus less on the number of agreements signed and more on utilisation, financing transparency and measurable results.

FIRST Test the Early Harvest Arrangement Kenya can use the Early Harvest Arrangement as a practical test of whether FOCAC trade commitments can translate into export diversification. That requires coordinated work on standards, certification, firm readiness, logistics and sector-specific market intelligence.	SECOND Treat the SGR as a corridor The SGR extension should be monitored as a regional economic corridor rather than only a construction project. Its development impact will depend on freight volumes, border integration, port and inland logistics, links to productive zones and the terms of its financing.	THIRD Keep a reconciled register Kenya should maintain its own reconciled register of FOCAC-linked commitments, bilateral cooperation and legacy projects. This would allow government to distinguish what was newly secured under the 2024 cycle from earlier cooperation and to enter the 2027 review with a clearer negotiating position.
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ANNEX A | METHOD

How to read this brief

This brief separates delivery status from FOCAC attribution. A1 means direct documentary linkage to the 2024 Beijing Summit outcomes. A2 means plausible linkage, but direct attribution remains incomplete. A3 covers post-summit bilateral activity without demonstrated FOCAC attribution. A4 covers projects or cooperation that began before September 2024 and continued or reached milestones afterwards. These classifications are separate from delivery stage, so an A1 activity may still be only at agreement 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 Kenyan 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 four Kenya records in this brief should therefore be read as a verified minimum, not a complete inventory of all China-Kenya cooperation under the current FOCAC cycle.

ANNEX B

Glossary

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

Term	Meaning
Early harvest	Interim arrangement that binds zero tariffs before a fuller agreement
MOFCOM	Ministry of Commerce of the People's Republic of China
GACC	General Administration of Customs of China
EAC	East African Community
SGR	Standard Gauge Railway
LDC	Least developed country (UN classification)
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
- Kenya National Treasury, RMB100 million grant: newsite.treasury.go.ke/signing-ceremony-agreement-economic-and-technical-cooperation-provision-grant-amounting-rmb-100
- Kenya Ministry of Roads and Transport, SGR construction launch: www.transport.go.ke/node/741
- MOFCOM, Early Harvest Arrangement: english.mofcom.gov.cn/News/SignificantNews/art/2026/art_1c88b82b7e254a4796c176211211cf58.html
- FOCAC follow-up outcomes list: www.mfa.gov.cn/eng/wibzhd/202506/t20250611_11646041.html
- Dawan, Early Harvest Arrangement takes effect: www.dawan.africa/news/kenya-eyes-china-breakthrough-as-zero-tariff-deal-takes-effect
- KBC, avocado and coffee exports to China, 2026: www.kbc.co.ke/chinas-zero-tariff-policy-drives-surge-in-kenyan-avocado-and-coffee-exports/
- Capital FM, SGR extension groundbreaking: capitalfm.africa/ruto-breaks-ground-on-sh549bn-naivasha-malaba-sgr-extension/

Independence, version and citation

Independence. This brief rests entirely on publicly available evidence. It uses no confidential government information and represents the independent assessment of Policy Delivery International Limited.

Version. Version 1.0, 30 September 2026. First public edition. Every record was verified on or before 30 September 2026; corrections to future editions will be listed here.

How to cite. Policy Delivery International Limited (2026). FOCAC Intelligence Africa Country Series, Volume 2: Kenya, version 1.0. Abuja: PDIL. policydelivery.africa.

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FOCAC Intelligence is a PDIL policy intelligence initiative.

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