



FOCAC INTELLIGENCE

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Egypt Country Brief

Post-Beijing FOCAC delivery in Egypt: tariff access, Suez Canal zone manufacturing, monetary cooperation and the 70th-anniversary state visit.

AT A GLANCE

US\$20.8bn

Egypt-China trade, 2025 (reported)

3x

Egyptian exports to China, H1 2026 vs H1 2025

US\$1.067bn

SCZone contracts signed at the FOCAC Summit

CNY 30bn

Central bank currency swap renewed June 2026 (line first signed 2016)



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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 Egypt, 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 Egypt matters in this wider picture

Egypt was the first Arab and African country to recognise the People's Republic (30 May 1956) and now hosts the most mature Chinese industrial zone in North Africa, the China-Egypt TEDA Suez Economic and Trade Cooperation Zone in Ain Sokhna. It is also the clearest test of China's non-LDC offer to Africa: as a middle-income economy with a trade deficit with China of roughly US\$19bn in 2025, Egypt gained nothing from the December 2024 LDC tariff measure and became eligible only when zero-tariff treatment was extended to 53 countries on 1 May 2026. Whether Beijing's FOCAC commitments translate into export gains and export-oriented manufacturing in a large, indebted, strategically placed economy is therefore more instructive in Egypt than almost anywhere else on the continent.

What we found

Egypt's post-Beijing FOCAC record is thicker and better documented than most on the continent, because Cairo used the Summit itself as a deal-making venue. Two strands carry direct FOCAC attribution: the six Suez Canal Economic Zone contracts signed in Beijing during the Summit (6 September 2024; SCZONE published the release on 8 September), one of which (Elite Solar) was producing solar cells and modules by January 2026, and the zero-tariff treatment that reached Egypt on 1 May 2026 under the extension first announced in the June 2025 Changsha Declaration. Around these sit a larger body of bilateral activity, including the renewal of a currency swap first signed in December 2016 and the September 2026 state visit, that runs in parallel with FOCAC but is not documented as flowing from it.

Implementation is real and, in the Suez zone, physically visible. Of the US\$1.067bn package signed in Beijing, Elite Solar broke ground in December 2024 and was commissioned in January 2026 with 2GW of cell and 3GW of module capacity; China Glass Holding's US\$300m New Energy Glass plant and Befar's US\$500m chlor-alkali complex broke ground in November 2024 and April 2025 respectively. The trade channel shows early

movement: CAPMAS reports Egyptian exports to China rising from US\$280.5m in H1 2025 to US\$840.8m in H1 2026, and MOFCOM's Trade Development Bureau co-organised a matchmaking round in Cairo in August 2026 that produced about US\$170m in export contracts.

Attribution weakens as one moves away from the Summit week. The Development Cooperation Strategy 2025-2029, the debt-for-development swap and the third phase of the TEDA zone were all agreed through bilateral channels (Premier Li Qiang's July 2025 visit, President Xi's September 2026 state visit) whose official readouts mention FOCAC only as a shared platform, and the currency swap is a central bank renewal of a line first signed in December 2016. No record yet reaches the verified-results stage: the H1 2026 export jump is concentrated in mineral fuels (about US\$494m), where tariff effects are uncertain, and no plant-level output or export data has been published for the Summit-sideline factories.

4 Core records subjected to full verification Two A1, one A3, one A4	13 Further activities screened September 2024 to September 2026	2 Records at operational use Zero-tariff access; Elite Solar plant in TEDA	0 Records at verified results Export growth observed, causal link untested
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The trade window

Egypt entered the zero-tariff era without a signed framework agreement. China's unilateral treatment has applied to Egyptian goods since 1 May 2026, and Egyptian official data show exports to China roughly tripling between the first halves of 2025 and 2026, although mineral fuels account for most of the increase. 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. Use the Summit as a transaction venue, not only a policy forum.** Egypt's most attributable delivery came from contracts signed during Summit week by a zone authority with land, utilities and a Chinese co-developer already in place.
- 2. Treat zero-tariff access as a trade-promotion programme.** Egypt paired the 1 May 2026 measure with a MOFCOM-backed matchmaking round within four months.
- 3. Insist on outcome data for industrial FOCAC claims.** Egypt's zone model generates assets quickly but little public evidence of output or jobs.

BOTTOM LINE

Egypt's FOCAC delivery is real, concentrated in the Suez zone and in market access, and strongest where it was contracted during the Summit itself.

Two records meet the A1 test and both have reached operational use: Summit-sideline manufacturing investment led by Elite Solar, and zero-tariff access from May 2026. The wider relationship, including the enlarged renewal of a 2016 currency swap, a first CIDCA debt-for-development swap and the September 2026 state visit, is substantial but runs on bilateral and Belt and Road tracks that FOCAC frames rather than drives.

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.

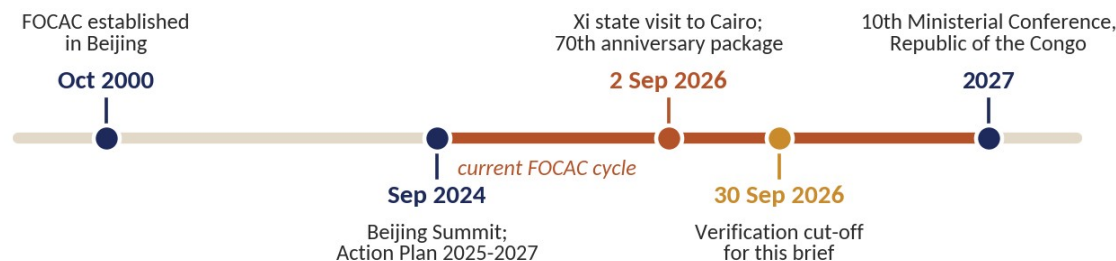


Figure 1. Key milestones: from FOCAC's founding to the 2027 review point.

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

Has China's post-Beijing FOCAC offer produced identifiable delivery in Egypt beyond the long-running Suez zone and infrastructure relationship, and how much of that delivery can be traced to the 2024 Summit rather than to bilateral momentum?

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

4 records assessed in full against the PDIL method

Verified implementation picture

Initiative	Current position	Attribution	Grade	Assessment
Zero-tariff treatment for Egyptian exports	Operational use	A1 Direct	A	China's Customs Tariff Commission extended zero tariffs to 20 non-LDC African states including Egypt from 1 May 2026, following the Changsha Declaration listed in China's FOCAC follow-up outcomes, and CAPMAS records a near tripling of Egyptian exports to China in H1 2026.
SCZone contract package signed on FOCAC Summit sidelines (Elite Solar lead case)	Operational use	A1 Direct	A	Six Chinese projects worth US\$1.067bn were contracted in Beijing during the Summit (6 September 2024; SCZONE published the release on 8 September) and reported on the official FOCAC Summit site; Elite Solar's plant in TEDA (2GW cells and 3GW modules) was commissioned in January 2026.

Initiative	Current position	Attribution	Grade	Assessment
Renewed and enlarged PBOC-CBE currency swap	Financing	A4 Pre-existing	A	The central banks renewed on 3 June 2026, for three years, a swap line first signed in December 2016 and enlarged it from CNY 18bn to CNY 30bn; neither the Chinese nor the Egyptian record cites FOCAC.
Xi Jinping state visit and TEDA phase three agreement	Agreement	A3 Bilateral	B	The 2 September 2026 talks produced five headline agreements, more than 20 further documents and a decision to launch TEDA's third phase and continue early-harvest consultations, framed by the 70th anniversary rather than FOCAC.

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 Egypt record sits on the delivery ladder at the verification cut-off.

1. Zero-tariff treatment for Egyptian exports to China

EFFECTIVE DATE	LEGAL INSTRUMENT	DELIVERY STAGE	ATTRIBUTION	EVIDENCE GRADE
1 May 2026 to 30 April 2028	Customs Tariff Commission of the State Council notice, 28 April 2026	Operational use (7 of 8)	A1 Direct	A

Egypt, as a non-LDC, was outside the December 2024 zero-tariff measure for least developed countries. It became eligible when China's Customs Tariff Commission announced on 28 April 2026 that zero-tariff treatment would apply to the 20 remaining non-LDC African countries with diplomatic ties from 1 May 2026 for two years, bringing coverage to 53 states. The notice frames the measure as a phased step towards a China-Africa Economic Partnership for Shared Development agreement, the modular framework referenced in China's June 2025 FOCAC follow-up outcomes list. For tariff-quota products only in-quota rates fall to zero.

Early trade data points in the expected direction. CAPMAS figures reported in August and September 2026 show Egyptian exports to China at US\$840.8m in H1 2026 against US\$280.5m in H1 2025, with Chinese exports to Egypt up a more modest 14.3% to about US\$10.4bn. Xinhua, citing Egyptian officials, gives a lower growth figure of 67.5% for the same period, a discrepancy that has not been reconciled. On 17 August 2026 MOFCOM's Trade Development Bureau and the Egyptian Exporters Association held an "Export to China" matchmaking in Cairo that yielded contracts worth about US\$168m to US\$170m.

The composition of the increase limits what can be claimed. Mineral fuels accounted for about US\$494m of H1 2026 exports, followed by fruit and vegetables (US\$150.6m) and cotton (US\$76.4m). Fuel shipments are volatile and often faced low tariffs already, so the gain cannot yet be credited to the tariff measure. The 2 September 2026 joint statement records that Egypt welcomed the exemption and that both sides will continue consultations on an early-harvest agreement, confirming that the bilateral framework agreement itself has not been concluded.

CURRENT ASSESSMENT

Directly attributable and in operational use, with strong early export growth, but the results stage is not reached until tariff-line utilisation and non-fuel export gains are shown.

Evidence for this record

- **State Council / Xinhua: zero-tariff notice:** english.www.gov.cn/news/202604/28/content_WS69f0a1d7c6d00ca5f9a0aad0.html
- **China FOCAC follow-up outcomes, June 2025:** www.mfa.gov.cn/eng/wjbxhd/202506/t20250611_11646041.html
- **CAPMAS H1 2026 trade data (Amwal Al Ghad):** en.amwalalghad.com/egypts-exports-to-china-jump-200-to-841-mln-in-h1-2026-capmas/

2. SCZone contract package signed on the FOCAC Summit sidelines (Elite Solar lead case)

SIGNED	VALUE	LEAD ASSET	DELIVERY STAGE	ATTRIBUTION	EVIDENCE GRADE
6 September 2024, Beijing, during the FOCAC Summit (SCZONE release dated 8 September)	US\$1.067bn across six Chinese projects	Elite Solar 2GW cell and 3GW module plant, TEDA, commissioned January 2026	Operational use (7 of 8)	A1 Direct	A

Prime Minister Mostafa Madbouly represented President Sisi at the Beijing Summit, and the Suez Canal Economic Zone used the week to sign six contracts: Shandong Tianyi bromine (US\$110m), China Glass Holding float and photovoltaic glass (US\$300m), Befar chlor-alkali (US\$500m), Elite Solar n-type cells (US\$100m at signing), a modified starch plant (US\$7.5m) and a home appliances supply park (US\$50m). The official FOCAC Summit website quotes Madbouly citing these SCZone contracts, and five ICT memoranda, as the visit's results, which provides the documentary link to the Summit.

Delivery has moved furthest on Elite Solar. SCZONE held the groundbreaking on 16 December 2024 for a 78,000 square metre plant with 600 direct jobs planned, and on 11 January 2026 Madbouly inaugurated the Elite Solar complex (Elite Solar Suez Technology and Elite Solar Green Energy) alongside Chinese-backed Vanward and Xin Jin textile plants. The investment was reported at US\$100m at signing and was later expanded; later SCZONE and press reports cite higher totals. Trade press reports commissioning on 26 January 2026 at 2GW of cells and 3GW of modules, with a significant export share including to the United States.

The other large assets are in construction. China Glass Holding's New Energy Glass subsidiary laid its foundation stone on 28 November 2024 (US\$300m, 1,000 jobs planned) and Befar broke ground on 15 April 2025 on a US\$500m, 100,000-tonne green chlor-alkali plant with an 18-month first-phase schedule. Progress on the bromine, starch and appliances projects has not been verified. No output, export or employment data has been published for any of the six, so results remain unevidenced.

CURRENT ASSESSMENT

The strongest Summit-to-factory trail in the Egyptian record, with one plant operating and two under construction, though outcome data is absent.

Evidence for this record

- **SCZONE: six Chinese contracts, US\$1.067bn:** sczone.eg/sczone-signs-new-contracts-for-6-chinese-projects-with-total-investments-exceeding-1-067-billion-with-total-investments-of-110-million-sczone-signed-the-contract-of-the-first-bromine-production/
- **FOCAC 2024 Summit site: Egyptian PM on visit results:** 2024focacsummit.mfa.gov.cn/eng/zpfh_1/202409/t20240912_11489483.htm
- **PV Tech: Elite Solar commissioning (2GW cells, 3GW modules):** www.pv-tech.org/elite-solar-commissions-5gw-pv-manufacturing-facility-in-egypt/

3. Renewed and enlarged PBOC-Central Bank of Egypt currency swap

DATE	SIZE	TERM	ORIGIN	DELIVERY STAGE	ATTRIBUTION	EVIDENCE GRADE
3 June 2026	CNY 30bn, up from CNY 18bn (about 67%)	Three years, extendable by mutual agreement	Renewal of a line first signed in December 2016	Financing (3 of 8)	A4 Pre-existing	A

The People's Bank of China and the Central Bank of Egypt renewed their bilateral local currency swap on 3 June 2026, enlarging it from CNY 18bn (about US\$2.65bn) to CNY 30bn for three years. The original line dates from December 2016. The 2 September 2026 joint statement welcomed the renewal and increase and referred to Egypt's Panda bond issuance as part of the same financial track.

The Beijing Action Plan commits China to expand local-currency settlement and financial cooperation with African partners, and the renewal is consistent with that commitment. However, the instrument is the renewal of a line first signed in December 2016, and neither the PBOC notice as reported by Xinhua nor the Egyptian coverage cites FOCAC, so under PDIL's attribution rules the record is classified as pre-existing (A4). Egypt's only verified Panda bond remains the RMB 3.5bn sustainable issue of October 2023, which predates the Summit.

A swap line is a contingent facility. No data has been located on drawdowns, on the value of trade settled in renminbi, or on use of the line to support Egyptian importers through foreign-exchange shortages, so the record stops at the financing stage.

CURRENT ASSESSMENT

A well-documented, enlarged renewal of a 2016 facility; its use is unconfirmed and it carries no FOCAC reference.

Evidence for this record

- **gov.cn / Xinhua: central banks renew swap:** english.www.gov.cn/news/202606/03/content_WS6a202aa0c6d00ca5f9a0b633.html

- **Egypt Today: swap extended for three years:** www.egypttoday.com/Article/3/147520/Egypt-China-extend-currency-swap-deal-for-three-more-years
- **Ahram Online: joint statement, Sep 2026:** english.ahram.org.eg/NewsContent/1/1234/575834/Egypt/Foreign-Affairs/Egypt-and-China-Joint-Statement-on-deepening-the-c.aspx

4. Xi Jinping state visit, 70th anniversary package and TEDA phase three

DATES	HEADLINE AGREEMENTS	KEY ECONOMIC OUTCOME	DELIVERY STAGE	ATTRIBUTION	EVIDENCE GRADE
State visit 30 August to 3 September 2026; talks 2 September	Five, plus more than 20 further cooperation documents	Launch of third phase of the China-Egypt TEDA zone; early-harvest consultations to continue	Agreement (2 of 8)	A3 Bilateral	B

President Xi's first visit to Egypt since January 2016 marked the 70th anniversary of relations. The MFA readout records that the two presidents witnessed signature of documents on Belt and Road cooperation, artificial intelligence, economy and trade, and industrial and supply-chain cooperation, and that more than 20 further documents were signed on the digital economy, science and technology, education and transport. Egyptian reporting names five headline instruments, including a Vision 2030 and Belt and Road alignment memorandum, an economic and technical cooperation agreement and an industrial and supply-chain memorandum with MOFCOM, and an SCZONE-MOFCOM document.

President Sisi announced agreement to launch the third phase of the TEDA zone, focused on renewable energy, automobiles, textiles and chemical fibres. The zone already hosts about 200 companies after a July 2025 expansion took it to just over 10 square kilometres, and TEDA has asked for more land. No investment figure for phase three has been disclosed. The joint statement also commits both sides to continue consultations on an early-harvest agreement to widen Egyptian access to the Chinese market.

The joint statement mentions FOCAC only in praising cooperation within the China-Arab States Cooperation Forum and FOCAC, and the documents are anniversary and Belt and Road instruments rather than Beijing Action Plan deliverables. Most of the 20-plus texts have not been published. A passing reference to FOCAC as a shared platform does not frame these documents as implementing the Summit outcomes, so the record is post-Summit bilateral (A3), at agreement stage, and its main value for FOCAC monitoring is the early-harvest track, which is the Egyptian component of the China-Africa framework agreement process.

CURRENT ASSESSMENT

Politically the most significant event of the period, but it produces agreements, not delivery, and its FOCAC link is rhetorical.

Evidence for this record

- **MFA: Xi holds talks with Sisi:** www.fmprc.gov.cn/eng/xw/zyxw/202609/t20260902_12015163.html
- **Ahram Online: joint statement text:** english.ahram.org.eg/NewsContent/1/1234/575834/Egypt/Foreign-Affairs/Egypt-and-China-Joint-Statement-on-deepening-the-c.aspx
- **Egypt Today: agreements signed:** www.egypttoday.com/Article/3/149231/Egypt-China-partnership-expands-with-new-investment-technology-deals

SECTION 3

The zero-tariff window and the early harvest question

Egypt entered the zero-tariff era without a signed framework agreement. China's unilateral treatment has applied to Egyptian goods since 1 May 2026, and Egyptian official data show exports to China roughly tripling between the first halves of 2025 and 2026, although mineral fuels account for most of the increase.

The joint statement issued during President Xi Jinping's state visit on 2 September 2026 records that the two sides will continue consultations on an early harvest agreement. Until that closes, Egypt's access, like Nigeria's, rests on a unilateral measure that runs to 30 April 2028.

Instrument	Status at cut-off	What it means
Zero-tariff treatment (unilateral)	In force since 1 May 2026	100% of tariff lines; valid to 30 April 2028 for non-LDCs
Framework agreement on economic partnership	Not concluded at cut-off	Consultations continuing under the September 2026 joint statement
Early harvest arrangement	Under consultation	Would make the preference permanent in exchange for Egyptian commitments
Rules of origin (GACC)	In force	40% regional value content for processed goods; relevant to SCZone manufacturers exporting to China

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 Egypt stands: no framework agreement at the cut-off; early harvest consultations continue. Without an arrangement, Egypt's zero-tariff access ends on 30 April 2028.

WHAT TO WATCH

Watch whether non-fuel exports sustain growth, whether SCZone producers use the preference, and whether the consultations produce a signed framework agreement and early harvest arrangement before 30 April 2028.

SECTION 4

What the Egypt evidence tells us

Egypt shows how a middle-income, deal-oriented government can convert a FOCAC Summit into bankable private investment. Cairo did not rely on the Beijing Action Plan's government-to-government menu; it used Summit week to close SCZone land contracts with Chinese manufacturers, and the one that has since reached production is an export-oriented solar plant positioned to serve markets that are diversifying away from China.

The form of delivery is therefore overwhelmingly commercial and zone-based, with Chinese state channels supplying the enabling layer.

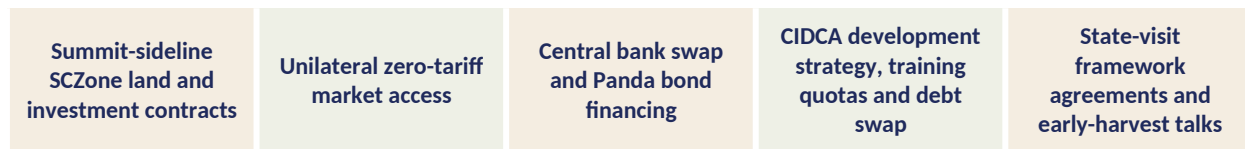


Figure 5. The forms FOCAC delivery is taking in Egypt.

The pattern differs from most FOCAC partners in that grant and training components are marginal to the record. The CIDCA track (a 2025-2029 development cooperation strategy, 2,000 training places for 2025-2027, a prosthetics feasibility grant of CNY 1.52m and a Level-3 biosafety laboratory) was signed during Premier Li's July 2025 visit and is modest relative to the industrial flows. The debt-for-development swap, the first CIDCA has concluded with any country, is the most novel instrument, but its value has not been disclosed; it builds on the October 2023 MoU signed by Minister Al-Mashat and CIDCA, hence A4.

The weakness in the record is the absence of outcome data. SCZONE announces contracts, groundbreakings and inaugurations systematically, but publishes little on output, exports or employment once plants open, and there is no Egyptian or Chinese reporting on zero-tariff utilisation by tariff line. Until those data exist, Egypt's record will remain one of visible assets and plausible but unproven results.

Key evidence gaps

#	Area	Open question
1	Zero-tariff treatment	How much of the H1 2026 export increase occurred in tariff lines where duties actually fell, and how much reflects mineral fuel shipments that were already low-tariff?
2	SCZone Summit-sideline package	What are Elite Solar's actual output, export volumes and local employment since January 2026, and have the Tianyi bromine, starch and appliances projects broken ground?
3	Agricultural market access	Has GACC approved any new Egyptian plant or animal product protocol since September 2024? None was found in official or media sources.
4	Currency swap and Panda bonds	Has the enlarged CNY 30bn line been drawn, and has Egypt issued a second Panda bond since 2023 as the joint statement implies?
5	State visit documents	What do the more than 20 unpublished September 2026 documents commit, and do any carry FOCAC or Beijing Action Plan references or financing figures?

Implications for the 2027 FOCAC cycle

For Nigeria and for PDIL's monitoring practice, Egypt's record offers three lessons on converting FOCAC into delivery and on how to judge that delivery.

FIRST Use the Summit as a transaction venue, not only a policy forum Egypt's most attributable delivery came from contracts signed during Summit week by a zone authority with land, utilities and a Chinese co-developer already in place. Nigeria's free zones and the Lekki and Ogun-Guangdong zones could prepare equivalent pipelines ahead of the next FOCAC ministerial so that political commitments land on shovel-ready sites.	SECOND Treat zero-tariff access as a trade-promotion programme Egypt paired the 1 May 2026 measure with a MOFCOM-backed matchmaking round within four months. Access alone did not diversify its exports: fuels still dominate. Nigeria, also a non-LDC beneficiary, will need product-specific GACC protocols and exporter preparation for the measure to shift non-oil exports.	THIRD Insist on outcome data for industrial FOCAC claims Egypt's zone model generates assets quickly but little public evidence of output or jobs. PDIL's monitor should grade industrial records at operational use until plant-level production, export and employment figures are published, and Nigerian agencies should build such reporting into zone concessions from the outset.
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ANNEX A

The wider China-Egypt register

The register below screens further China-Egypt activities recorded between September 2024 and September 2026. Items that belong to the four core records are listed where they are distinct assets or events; pre-existing flagship projects (New Administrative Capital CBD, MisrSat-2 and the satellite assembly centre, Luban Workshops opened in 2020) are excluded because no new post-Summit milestone was verified.

WHAT THE WIDER REGISTER SHOWS

The register confirms the pattern in the core records. Three items carry A1 attribution, all Summit-week SCZone or ICT agreements and their follow-on construction. The two items drawn from China's own June 2025 follow-up outcomes list, which records Egypt only for security consultations and media activities, are A2. Under PDIL's attribution rules, follow-up-list items with earlier rounds are A2, and bilateral agreements with no Summit framing are A3. The remaining items sit on bilateral or pre-existing tracks, notably Premier Li's July 2025 visit and the continuing expansion of TEDA.

Industrial activity dominates by value, while development cooperation and health items are small and at agreement stage. Grades are mostly B because SCZONE and Egyptian ministry releases are consistent but rarely corroborated by plant-level or Chinese government data; two outcomes-list items rest on a single Chinese source and are graded C.

Record	Date	Stage	Attribution	Grade
Five ICT memoranda signed on FOCAC Summit sidelines	Sep 2024	Agreement	A1	B
China Glass Holding New Energy Glass plant, US\$300m, foundation stone	Nov 2024	Implementation	A1	B
Befar green chlor-alkali complex, US\$500m, groundbreaking	Apr 2025	Implementation	A1	A
Third China-Egypt MFA counter-terrorism consultation (FOCAC outcomes list)	Jun 2025	Milestone	A2	C
Film restoration cooperation and "Seeing China" events (FOCAC outcomes list)	Jun 2025	Milestone	A2	C
Sunrev US\$200m solar cell and module complex in TEDA, groundbreaking	Jun 2025	Implementation	A3	B
Development Cooperation Strategy 2025-2029 and 2,000 training places (CIDCA)	Jul 2025	Agreement	A3	B
Debt-for-development swap, first-phase framework agreement (CIDCA)	Jul 2025	Agreement	A4	B
Level-3 biosafety laboratory and prosthetics feasibility grant, exchange of letters	Jul 2025	Agreement	A3	C
TEDA zone expansion by 2.86 sq km to just over 10 sq km	Jul 2025	Implementation	A4	B
Three Chinese complexes in Sokhna, US\$1.15bn (polyester, tyres, hygiene products)	Dec 2025	Agreement	A3	B
Vanward water heater and Xin Jin textile plants inaugurated in SCZone	Jan 2026	Operational use	A3	B

Record	Date	Stage	Attribution	Grade
MOFCOM-Egyptian Exporters Association "Export to China" matchmaking, about US\$170m contracts	Aug 2026	Agreement	A2	A

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 Egyptian 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
A Independently corroborated		B Official documentary		C Credible but incomplete		D Insufficient	

The available public record remains incomplete. Important areas of China-Egypt 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.

ANNEX C

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
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
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)
SCZone	Suez Canal Economic Zone
TEDA	Tianjin Economic-Technological Development Area, developer of the China-Egypt TEDA Suez zone
CIDCA	China International Development Cooperation Agency
PBOC	People's Bank of China
CBE	Central Bank of Egypt
CAPMAS	Central Agency for Public Mobilization and Statistics (Egypt)

EVIDENCE BASE

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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.

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