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South Africa Country Brief

Preferential market access is now operational, but the negotiated trade architecture and most project claims remain unfinished or thinly evidenced

AT A GLANCE

1 May 2026

Zero-tariff treatment in force (to 30 April 2028)

5 Feb 2026

Economic partnership framework signed

2

GACC fruit protocols since the Summit

US\$53.5bn

Bilateral trade 2025, Chinese figures (US\$36.4bn on South African figures)



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Technical team: Dr. Henry Anibe Agbonika, Adejumobi Fashola, Dr. Tokunbo Alaga Olorundami, Tijesunimi Falade, Mbotidem Jackson

Policy Delivery International Limited (PDIL)

policydelivery.africa | info@policydelivery.africa | +2348156527286 | Ventures Park, 5 Kwaji Close, Maitama, Abuja, Nigeria



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 South Africa, 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 South Africa matters in this wider picture

South Africa is China's largest trading partner in Africa and China has been South Africa's largest trading partner for 17 consecutive years. It co-chaired FOCAC through the 2015 Johannesburg and 2018 Beijing summits, sits with China in BRICS, and held the G20 presidency in 2025. It is also one of the 20 non-least-developed African economies that were outside China's December 2024 duty-free offer, which makes it the clearest test of whether the 2024 Beijing Summit trade package extends beyond the least developed countries. Pretoria's pivot has been sharpened by the 30 percent US tariff imposed in August 2025, so the question of what FOCAC actually delivers is commercially live, not rhetorical.

What we found

South Africa's post-Beijing FOCAC record is anchored in trade rather than projects. The one unambiguous delivery is China's zero-tariff treatment, extended to all 53 African countries with diplomatic relations from 1 May 2026 (South Africa among the 20 non-least-developed economies newly covered) and described by Pretoria as a significant outcome of FOCAC 2024. It sits on top of a Framework Agreement on Economic Partnership signed in February 2026 and a steady pipeline of phytosanitary protocols. Beyond trade, the evidence thins quickly: the project claims in China's June 2025 outcomes list lack host confirmation, and the largest investment of the period is commercial rather than FOCAC-linked.

The trade track is real and documented on both sides. The Changsha Declaration of June 2025, adopted at the FOCAC coordinators' meeting, committed China to extend zero-tariff treatment on 100 percent of tariff lines to all 53 African countries with diplomatic relations, through the China-Africa Economic Partnership for Shared Development agreements the Beijing Action Plan had already foreshadowed. Minister Parks Tau signed South Africa's framework agreement with Minister Wang Wentao on 5 February 2026, and China's Customs Tariff Commission brought the unilateral scheme into force on 1 May 2026, with the first South African apples and

wine cleared the same day. What has not closed is the negotiated layer: the early harvest arrangement that would make preferences permanent was targeted for March 2026 but was still under negotiation, with SACU consultation outstanding, at the last verifiable point in late June 2026.

Outside trade, attribution is the problem rather than activity. China's June 2025 outcomes list credits South Africa with a jointly built remote-sensing satellite ground station, a joint laboratory, an earth-science cooperation document and a poverty-alleviation village survey, but none of these has been located in a South African government or institutional source. Meanwhile the most consequential Chinese investment of the period, Chery's acquisition and relaunch of the former Nissan plant at Rosslyn, carries no FOCAC reference from either government. South Africa's record therefore shows delivery of market access, not yet of measurable trade results, and a project layer that is largely claimed rather than evidenced.

4 Core records verified Two A1, one A2, one A3	2 Records at operational use Zero-tariff treatment and stone fruit exports	13 Further activities screened Annex register, Sep 2024 to Sep 2026	0 Records at verified results No utilisation or trade-change data published
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The trade window

South Africa has two of the three trade instruments. China's zero-tariff treatment has applied since 1 May 2026, with the first South African apples and wine cleared the same day, and the framework agreement was signed on 5 February 2026. 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. Measure utilisation, not access.** The operative question is no longer whether preferences exist but whether exporters use them.
- 2. Treat SPS protocols as the binding constraint.** Zero duties are worthless for fresh produce without a GACC protocol.
- 3. Negotiate the permanent layer with safeguards.** The unilateral scheme expires on 30 April 2028.

BOTTOM LINE

South Africa has received the most consequential FOCAC trade deliverable on the continent, but its record shows access delivered, not yet results.

Two records meet the A1 standard with grade A evidence: the zero-tariff treatment operating since 1 May 2026 and the February 2026 framework agreement. A third, the stone fruit protocol, has reached commercial trade with plausible attribution. The largest new investment, Chery at Rosslyn, is real but commercial.

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.

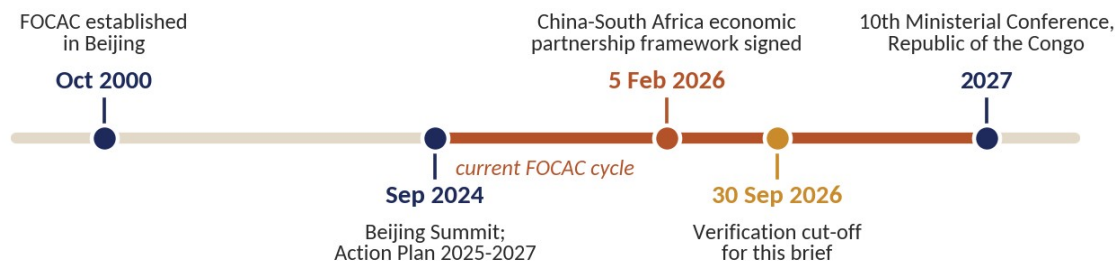


Figure 1. Key milestones: from FOCAC's founding to the 2027 review point.

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 South Africa's post-Beijing engagement with China produced FOCAC deliverables that are operating in practice, or mainly agreements, announcements and pre-existing activity relabelled as summit follow-up?

The rest of this brief applies this test to South Africa. 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 South Africa

4 records assessed in full against the PDIL method

Verified implementation picture

Initiative	Current position	Attribution	Grade	Assessment
China's zero-tariff treatment for South African exports	Operational use	A1 Direct	A	Customs Tariff Commission notice (28 Apr 2026), dtic and SAnews statements calling it an outcome of FOCAC 2024, and first consignments cleared in Shenzhen and Changsha on 1 May 2026.
Framework Agreement on Economic Partnership (CAEPA, Pretoria's title for its CAEPSD framework agreement)	Agreement	A1 Direct	A	Signed by Tau and Wang Wentao in Beijing on 5 Feb 2026, fulfilling a Beijing Action Plan commitment; early harvest arrangement still unsigned.
Stone fruit market-access protocol	Operational use	A2 Plausible	A	Protocol signed with GACC on 15 Oct 2025; first commercial plum consignment of about 20,000 cartons shipped Feb 2026; no explicit FOCAC reference.

Initiative	Current position	Attribution	Grade	Assessment
Chery acquisition and relaunch of the Rosslyn vehicle plant	Implementation	A3 Bilateral	A	Announced at SAIC 2026 (31 Mar 2026) and launched on 5 Jul 2026 with the Deputy President; production due mid-2027; no FOCAC link.

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.

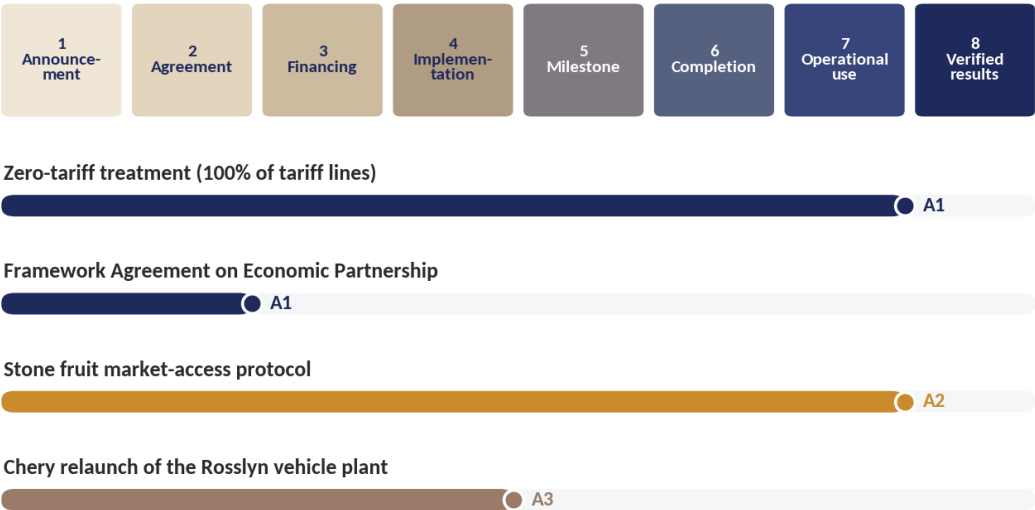


Figure 4. Where each verified South Africa record sits on the delivery ladder at the verification cut-off.

1. China's zero-tariff treatment for South African exports

INSTRUMENT	PERIOD	DELIVERY STAGE	ATTRIBUTION	EVIDENCE GRADE
Unilateral preference, Customs Tariff Commission of the State Council	1 May 2026 to 30 April 2028 (non-LDC tranche)	Operational use	A1 Direct (Changsha Declaration, FOCAC coordinators' meeting, June 2025)	A

The Beijing Action Plan extended duty-free treatment on 100 percent of tariff lines to African least developed countries, which took effect in December 2024 and excluded South Africa. The June 2025 Changsha Declaration, adopted at the ministerial meeting of FOCAC coordinators on implementing the Beijing Summit follow-up actions, then committed China to extend the same treatment to all 53 African countries with diplomatic relations. President Xi's message to the African Union summit on 14 February 2026 fixed 1 May 2026 as the start date, and the Customs Tariff Commission published the notice on 28 April 2026.

For South Africa, the scheme runs from 1 May 2026 to 30 April 2028. For quota products only in-quota rates fall to zero, and access is conditional on product-specific rules of origin and a valid certificate of origin. The dtic statement of 8 May 2026 and the SAnews report of 13 May 2026 describe the scheme as a significant outcome of FOCAC 2024, and the dtic has set up an export help desk. On 1 May 2026, 24 tonnes of apples cleared customs in Shenzhen and more than 6,000 bottles of wine cleared in Changsha.

The measure is operating, but it is temporary and unilateral. Its value depends on whether the negotiated early harvest arrangement converts it into a permanent, bound preference, and on whether South African exporters actually claim it. No data on preference utilisation, certificates issued or incremental export value has been published.

CURRENT ASSESSMENT

The strongest FOCAC-attributable delivery in the South African record, verified at operational use but not yet at results.

Evidence for this record

- **Customs Tariff Commission announcement (gov.cn):** english.www.gov.cn/news/202604/28/content_WS69f0a1d7c6d00ca5f9a0aad0.html
- **Minister Tau statement (gov.za):** www.gov.za/news/media-statements/minister-parks-tau-welcomes-china%E2%80%99s-temporary-zero-tariff-preference-scheme
- **First consignments (Daily Maverick):** www.dailymaverick.co.za/article/2026-05-01-tau-hails-chinas-zero-tariff-policy-as-first-batch-of-sa-produce-arrives-in-shenzhen/

2. Framework Agreement on Economic Partnership for Shared Prosperity (CAEPA)

SIGNED	SCOPE	DELIVERY STAGE	ATTRIBUTION	EVIDENCE GRADE
5 February 2026, Beijing (Parks Tau and Wang Wentao)	Trade, investment, new energy and multilateral cooperation	Agreement	A1 Direct (Beijing Action Plan commitment to sign framework agreements on economic partnership for shared development)	A

The Beijing Action Plan commits China to sign framework agreements on economic partnership for shared development with interested African countries. South Africa's agreement was signed during Minister Tau's visit to China on 5 February 2026 (some media date it 6 February). Pretoria titles it the Framework Agreement on Economic Partnership for Shared Prosperity; Chinese sources use Shared Development. The dtic statement frames it around trade, investment, new energy and multilateral cooperation, with WTO consistency and development objectives.

The framework is a platform, not a preference. The dtic said the early harvest agreement, which would provide duty-free access for South African exports and enhanced Chinese investment, would be concluded by the end of March 2026. The Ninth Bi-National Commission on 26 March 2026 and Deputy President Mashatile's trade forum remarks of 27 March still described it as pending and subject to Customs Union consultation, and in late June 2026 Minister Tau said South Africa remained committed to working with China and its SACU partners to secure an outcome. A memorandum on institutional connectivity of rules and standards between SAMR and South Africa's NRCS and SANAS followed in June 2026.

Analyst commentary reports that China's draft offer phases out tariffs on many agricultural lines, including citrus, wine and stone fruit, only over ten years. This has not been confirmed against the negotiating text and should not be conflated with the unilateral scheme, which already applies zero duties.

CURRENT ASSESSMENT

A direct FOCAC delivery at agreement stage only; the operative early harvest arrangement remains unsigned at the cut-off.

Evidence for this record

- **dtic statement on signing (gov.za):** www.gov.za/news/media-statements/minister-parks-tau-signs-framework-agreement-economic-partnership-shared
- **Beijing Action Plan 2025-2027 (MFA):** www.mfa.gov.cn/eng/xw/zyxw/202409/t20240905_11485719.html
- **Rules and standards MoU, early harvest status (IOL):** iol.co.za/business-report/economy/2026-06-29-south-africa-and-china-strengthen-trade-ties-through-new-agreements/

3. Stone fruit market-access protocol (apricots, peaches, nectarines, plums, prunes)

SIGNED	FIRST SHIPMENT	DELIVERY STAGE	ATTRIBUTION	EVIDENCE GRADE
15 October 2025, Shanghai (Minister Steenhuisen and GACC Minister Sun Meijun)	About 20,000 cartons of plums, February 2026	Operational use	A2 Plausible (Beijing Action Plan SPS and agricultural access commitments; no explicit FOCAC reference)	A

The protocol was signed in Shanghai on 15 October 2025 by Agriculture Minister John Steenhuisen and GACC Minister Sun Meijun. It covers five stone fruits in a single instrument, which South African officials describe as the first time China has negotiated access for several fruits from one country in one agreement. The department projected R28 million in exports in 2025/26, R400 million over five years and about 350 direct jobs.

The first commercial consignment, about 20,000 cartons of plums from a Franschhoek packhouse, was marked in February 2026 in the presence of the Minister and Ambassador Wu Peng. A cherry protocol followed on 8 September 2026 in Beijing, signed by Agriculture Minister Willie Aucamp with GACC at the ninth China-South Africa Sanitary and Phytosanitary (SPS) ministerial meeting; a blueberry protocol is in draft.

The Beijing Action Plan commits China to strengthen inspection and quarantine cooperation and expand access for African agricultural exports, so the attribution is plausible. Neither government, however, presents these protocols as FOCAC deliverables, and both sit inside a longer GACC pipeline that already covered citrus, avocado, beef and wine before the summit.

CURRENT ASSESSMENT

Delivery is verified to first commercial trade; FOCAC attribution is plausible rather than documented.

Evidence for this record

- **Minister Steenhuisen statement (gov.za):** www.gov.za/news/media-statements/minister-john-steenhuisen-signs-landmark-stone-fruit-trade-protocol-china-15
- **First shipment (Xinhua):** english.news.cn/20260220/90c2c3bb6d614d0391bf8203e4edfc2a/c.html

4. Chery acquisition and relaunch of the Rosslyn vehicle plant

ANNOUNCED	PLANT LAUNCH	DELIVERY STAGE	ATTRIBUTION	EVIDENCE GRADE
31 March 2026, South Africa Investment Conference	5 July 2026, Rosslyn, Pretoria	Implementation	A3 Bilateral (commercial, no FOCAC link)	A

Chery confirmed at the 2026 South Africa Investment Conference that it had acquired Nissan's Rosslyn plant, which Nissan had operated for more than 60 years. The plant was formally launched on 5 July 2026 with Deputy President Mashatile, Chery Chairman Yin Tongyue and Ambassador Wu Peng present.

The company plans 12 to 18 months of retooling, first production in mid-2027 with about 15,000 vehicles in the second half of that year, and full capacity of 50,000 units a year. It committed to retain 692 existing employees and projects close to 3,000 direct and indirect jobs. The investment value has not been disclosed.

This is the largest Chinese manufacturing commitment in South Africa in the period, but neither government frames it as FOCAC delivery. It belongs in the investment picture that FOCAC's F03 commitment counts in aggregate, not in the attributable delivery record.

CURRENT ASSESSMENT

Material and verified investment at implementation stage, correctly classified as post-summit bilateral activity rather than FOCAC delivery.

Evidence for this record

- **Plant launch (Xinhua):** english.news.cn/20260705/a42e34c94dde4129b56a089027293375/c.html
- **Investment announcement (IOL):** iol.co.za/business-report/companies/2026-04-01-chery-confirms-investment-in-new-manufacturing-plant-in-south-africa/

SECTION 3

The zero-tariff window and the early harvest question

South Africa has two of the three trade instruments. China's zero-tariff treatment has applied since 1 May 2026, with the first South African apples and wine cleared the same day, and the framework agreement was signed on 5 February 2026.

The third, the early harvest arrangement, needs South African and SACU consent. The dtic expected it by the end of March 2026; it was still under negotiation, with SACU consultation outstanding, at the last verifiable point in late June 2026. The instruments that moved are those China controls unilaterally.

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
Framework Agreement on Economic Partnership	Signed 5 February 2026	Fulfils a named Beijing Action Plan commitment
Early harvest arrangement	Under negotiation; SACU consultation outstanding	Would bind preferences beyond 2028; terms on steel and agriculture are sensitive

Instrument	Status at cut-off	What it means
GACC protocols	Stone fruit (Oct 2025), cherries (Sep 2026)	Market access that tariffs alone cannot deliver

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 South Africa stands: framework signed on 5 February 2026; early harvest under negotiation, pending consultation within SACU, whose members share a common external tariff. Without an arrangement, access ends on 30 April 2028.

WHAT TO WATCH

Watch the SACU consultation, the treatment of steel and other sensitive sectors, any long agricultural phase-in, and the first utilisation data from South African exporters.

SECTION 4

What the South Africa evidence tells us

South Africa's record shows that FOCAC delivery for a middle-income economy runs mainly through market access rather than projects. The instruments that moved were those China controls unilaterally (the tariff scheme and GACC protocols); the instrument that needs South African and SACU consent, the early harvest arrangement, has not closed.



Figure 5. The forms FOCAC delivery is taking in South Africa.

The strongest evidence is also the most FOCAC-explicit. Pretoria's own statements tie the zero-tariff scheme to FOCAC 2024, and the framework agreement fulfils a named Beijing Action Plan commitment. By contrast, the science, technology and livelihood items listed for South Africa in China's June 2025 outcomes report cannot be traced to a host institution, and the satellite ground station claim may overlap with the Stellenbosch quantum ground station used in the 2025 China-South Africa quantum key distribution experiment, which predates the summit as a research collaboration.

Market opening and trade defence are moving in parallel. South Africa imposed safeguard duties on hot-rolled steel in 2025 and, in September 2026, definitive anti-dumping duties of 8.21 to 57.84 percent on Chinese corrosion-resistant steel coils, while China invites South Africa to steel investment promotion. Any assessment of FOCAC trade outcomes for South Africa has to read preference gains against this industrial pressure.

Key evidence gaps

#	Area	Open question
1	Early harvest arrangement	Has the arrangement been concluded or initialled since June 2026, what is SACU's position, and does China's offer phase agricultural tariffs over ten years as reported?
2	Zero-tariff utilisation	How many South African consignments and what value have claimed the preference since 1 May 2026, and which lines are constrained by tariff-rate quotas?
3	Joint remote-sensing satellite ground station	Where is the station, which South African institution operates it, and when did it enter operation? No SANSA or DSTI confirmation was found.
4	Joint laboratory with South Africa	Which South African institution hosts the joint laboratory China reports as launched by June 2025, and in what field?
5	Poverty-alleviation demonstration village	Has the technical survey under the exchange of notes taken place, and has a site or grant value been agreed?

Implications for the 2027 FOCAC cycle

South Africa's experience is instructive for other non-LDC African economies, Nigeria included, which gained zero-tariff access on the same date and face the same choice between a temporary unilateral preference and a negotiated, permanent one.

FIRST

Measure utilisation, not access

The operative question is no longer whether preferences exist but whether exporters use them. Trade ministries should publish certificate-of-origin counts and preference-claimed values by product so that FOCAC trade delivery can be assessed at the results stage rather than asserted at the announcement stage.

SECOND

Treat SPS protocols as the binding constraint

Zero duties are worthless for fresh produce without a GACC protocol. South Africa's two protocols in eleven months show what a disciplined, commodity-by-commodity pipeline delivers; countries without one will find the tariff scheme largely theoretical for agriculture.

THIRD

Negotiate the permanent layer with safeguards

The unilateral scheme expires on 30 April 2028. Early harvest terms, including any long phase-in on agricultural lines and the treatment of steel and other sensitive sectors, will determine whether FOCAC trade gains outlast the current plan cycle.

ANNEX A

The wider China-South Africa register

The register below screens further China-South Africa activities between September 2024 and September 2026. Inclusion does not imply FOCAC attribution; each item is classified by furthest evidenced stage, attribution and evidence grade.

WHAT THE WIDER REGISTER SHOWS

The register confirms the pattern in the core records. FOCAC-plausible items are concentrated in trade facilitation; claims that appear only in China's June 2025 outcomes list are classed A5 until South Africa confirms them; and the better-evidenced items are bilateral mechanisms (the Bi-National Commission, the standards memorandum, the nuclear MoU) and commercial projects that carry no FOCAC reference.

Four items rest on a single Chinese aggregate source and are graded C. Items reported only in Chinese aggregate lists without South African confirmation are classed A5; events on FOCAC's own platforms without a record-specific link to the Summit, such as South Africa's role as Guest Country of Honour at the China-Africa Economic and Trade Expo, are classed A2. They should not be counted as South African FOCAC deliveries until a host institution confirms them. The Luban Workshop and quantum link are pre-existing and are recorded only to prevent them being relabelled as 2024 summit outputs.

Record	Date	Stage	Attribution	Grade
Cherry market-access protocol (GACC)	Sep 2026	Agreement	A2	A
Joint remote-sensing satellite ground station (claimed in operation)	Jun 2025	Operational use (claimed)	A5	C
Joint laboratory with South Africa (unnamed)	Jun 2025	Implementation (claimed)	A5	C
Earth-science cooperation document	Jun 2025	Agreement	A5	C
Exchange of notes on poverty-alleviation demonstration village survey	Jun 2025	Agreement	A5	C
South Africa as Guest Country of Honour, 4th China-Africa Economic and Trade Expo	Jun 2025	Implementation	A2	B
Initiative on Cooperation Supporting Modernization in Africa (G20 Johannesburg)	Nov 2025	Announcement	A2	B
Ninth South Africa-China Bi-National Commission	Mar 2026	Agreement	A3	B
SAMR-NRCS/SANAS memorandum on rules and standards connectivity	Jun 2026	Agreement	A3	B
NECSA-CNNC nuclear cooperation MoU (fuel cycle, SMRs)	Apr 2025	Agreement	A3	B
Red Sand battery storage project, Northern Cape (Sungrow supply to CEEC Gezhouba)	Jan 2026	Implementation	A3	C
Satellite quantum key distribution link, Stellenbosch and USTC	Mar 2025	Milestone	A4	A
DUT Luban Workshop (Tianjin Vocational Institute)	Dec 2019	Operational use	A4	B

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. A5 marks items claimed only in Chinese aggregate reporting with no host-country confirmation after search. 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 South African 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-South Africa 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

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
CAEPA	Pretoria's title for its CAEPSD framework agreement with China, signed 5 February 2026
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)
SACU	Southern African Customs Union (South Africa, Botswana, Eswatini, Lesotho, Namibia)
dtic	Department of Trade, Industry and Competition, South Africa
SAMR	State Administration for Market Regulation, China
NRCS	National Regulator for Compulsory Specifications, South Africa
SANAS	South African National Accreditation System
NECSA	South African Nuclear Energy Corporation
CNNC	China National Nuclear Corporation
SAIC	South Africa Investment Conference
DSTI	Department of Science, Technology and Innovation, South Africa
SANSA	South African National Space Agency
DoA	Department of Agriculture, South Africa

EVIDENCE BASE

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Independence, version and citation

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CONTACT

Ventures Park, 5 Kwaji Close, Maitama, Abuja
info@policydelivery.africa
policydelivery.africa
+2348156527286