

FOCAC INTELLIGENCE

Trade Series | Explainer (Public Edition)

The China-Africa Economic Partnership for Shared Development

What it is, where Africa stands, and the choices before Nigeria ahead of the April 2028
deadline

AT A GLANCE

26 Mar 2026

Nigeria-China framework agreement signed

Not yet

Early harvest arrangement concluded

88%

of Nigerian exports to China already entered duty-free

30 Apr 2028

Unilateral zero-tariff preference expires



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Companion products: China-Africa Zero-Tariff Trade Model (Excel); Making Origin Work for Nigeria (Rules of Origin Policy Brief)

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Key messages

*The arrangement, the deadline and Nigeria's choices***For senior decision-makers**

- The China-Africa Economic Partnership for Shared Development (CAEPSD) is China's legal vehicle for turning its unilateral zero-tariff offer to Africa into binding, bilateral commitments. It has three layers: a framework agreement, an early harvest arrangement, and later negotiations topic by topic.
- Nigeria signed its framework agreement on 26 March 2026. It has not yet concluded an early harvest arrangement. Without one, Nigeria's zero-tariff preference ends on 30 April 2028 (about 88% of its exports to China already enter duty-free).
- The early harvest arrangement is where the real bargain happens. China binds zero tariffs on all tariff lines. The African partner is usually asked to open its own market to some Chinese goods, as the Republic of Congo and Kenya have done.
- Nigeria's concessions are constrained by the ECOWAS Common External Tariff, a fragile manufacturing base, customs revenue needs and an already large trade deficit with China (about US\$21.8bn in 2025).
- Nigeria's leverage is highest now, while China seeks to lock in arrangements across the continent before 2028. Nigeria's choices turn on permanence, rules of origin, SPS access and investment, and on what, if anything, it offers in return.

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SECTION 1

What the CAEPSD is

A three-layer architecture for turning a unilateral offer into binding commitments

China first signalled the initiative at the Ministerial Meeting of Coordinators on the Implementation of FOCAC Follow-up Actions in Changsha in June 2025. It announced its willingness to grant zero-tariff treatment on all tariff lines to the 53 African countries with which it has diplomatic relations, and to sign agreements on economic partnership for shared development with them. President Xi Jinping confirmed the offer in a message to the 39th African Union Summit (14 February 2026). The unilateral zero-tariff treatment for the 20 non-LDC African countries, including Nigeria, took effect on 1 May 2026 and runs until 30 April 2028.

The CAEPSD is designed to outlast that two-year window. China describes it as turning a time-limited unilateral preference into a "long-term, stable and predictable institutional safeguard". It is built in three layers.



Figure 1. The three layers of the CAEPSD and where Nigeria stands

Source: PDIL analysis of MOFCOM and Chinese government statements.

Layer	What it does	Legal weight	Nigeria status
1. Framework agreement	Commits both sides to negotiate on trade in goods and services, investment, digital trade, green development, and modernisation of the partner's manufacturing and agriculture.	Sets the agenda; few binding market access commitments.	Signed 26 March 2026 (34th African country).
2. Early harvest arrangement	Binds China's zero tariffs on 100% of tariff lines for the partner; usually includes some market opening by the partner; contains its own rules of origin chapter.	Binding treaty commitments; removes the 2028 cliff.	Not concluded.
3. Modular negotiations	Later chapters on services, investment, digital trade and other areas, negotiated as modules towards a fuller partnership agreement.	Binding as each module is concluded.	Not started.

What it is not

- **Not yet a free trade agreement.** Early harvests cover goods only and are partial on the African side. They are a first step towards a fuller agreement.
- **Not a financing package.** The CAEPSD is a trade instrument. It is not linked, on the public record, to loans or project finance, though China presents it alongside FOCAC investment and industrial cooperation.

- **Not automatic.** The unilateral preference lapses in April 2028 for any non-LDC that has not concluded an early harvest arrangement or secured an extension.

WTO basis

On 17 November 2025, China notified the CAEPSD and the Republic of Congo early harvest arrangement to the WTO Committee on Trade and Development, stating that it complies with WTO-authorised provisions. Notification to that committee, rather than the Committee on Regional Trade Agreements, suggests that China relies on the Enabling Clause, which allows partial preferential arrangements among developing countries. This is PDIL's reading and not a stated Chinese position. By contrast, the unilateral zero-tariff scheme for the 20 non-LDCs has drawn legal commentary on whether it stretches the Enabling Clause, because eligibility depends on diplomatic recognition and is limited to one continent. The legal fragility of the unilateral scheme is itself an argument for concluding a bilateral arrangement.

SECTION 2

Timeline

From the Changsha pledge to the April 2028 cliff edge

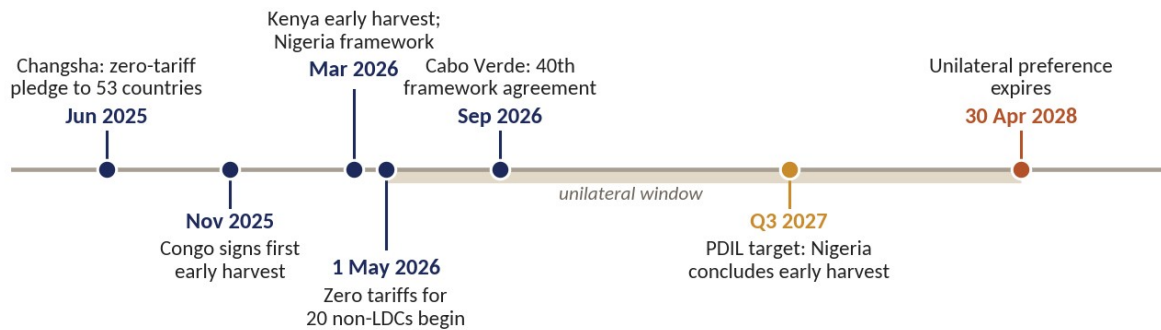


Figure 2. Key milestones, 2025-2028

Source: MOFCOM; Government of China; Chinese diplomatic missions; PDIL.

Date	Event
June 2025	Changsha ministerial meeting: China announces intent to extend zero tariffs to all 53 African countries with diplomatic ties and to sign CAEPSD agreements.
4 November 2025	Republic of Congo signs the first early harvest arrangement (Shanghai).
17 November 2025	China notifies the CAEPSD and the Congo arrangement to the WTO Committee on Trade and Development.
15 January 2026	Kenya announces a preliminary deal giving duty-free access for about 98.2% of its exports to China.
5 February 2026	South Africa signs its framework agreement (33rd).
14 February 2026	President Xi confirms the zero-tariff offer in a message to the 39th African Union Summit.
24 March 2026	Kenya signs its early harvest arrangement (second in Africa).
26 March 2026	Nigeria signs its framework agreement (34th), on the margins of the WTO 14th Ministerial Conference. Signatories: Minister Jumoke Oduwole and Minister Wang Wentao.
1 April 2026	Congo early harvest arrangement enters into force, with its own rules of origin (GACC Announcement 2026 No. 33).
28 April 2026	Tariff Commission Announcement 2026 No. 5 sets zero tariffs for 20 non-LDCs.
1 May 2026	Zero tariffs for non-LDCs take effect; GACC Announcement 2026 No. 54 sets rules of origin.
15 August 2026	Abuja seminar: Nigeria commits to finalise its CAEPSD agreement; H1 2026 bilateral trade reported at US\$18bn (+35%) by Ambassador Yu Dunhai.
9 September 2026	Cabo Verde signs its framework agreement (40th); early harvest talks reported substantially concluded.
30 April 2028	Unilateral preference for non-LDCs expires unless replaced.

SECTION 3

Where other African countries stand

Two early harvests signed, forty frameworks, and a continent moving at different speeds

China had signed framework agreements with 40 African countries by 9 September 2026 (Xinhua; Ambassador Yu cited 38 in August). Only two early harvest arrangements are confirmed as signed. Their terms offer the clearest guide to what China will ask of Nigeria.

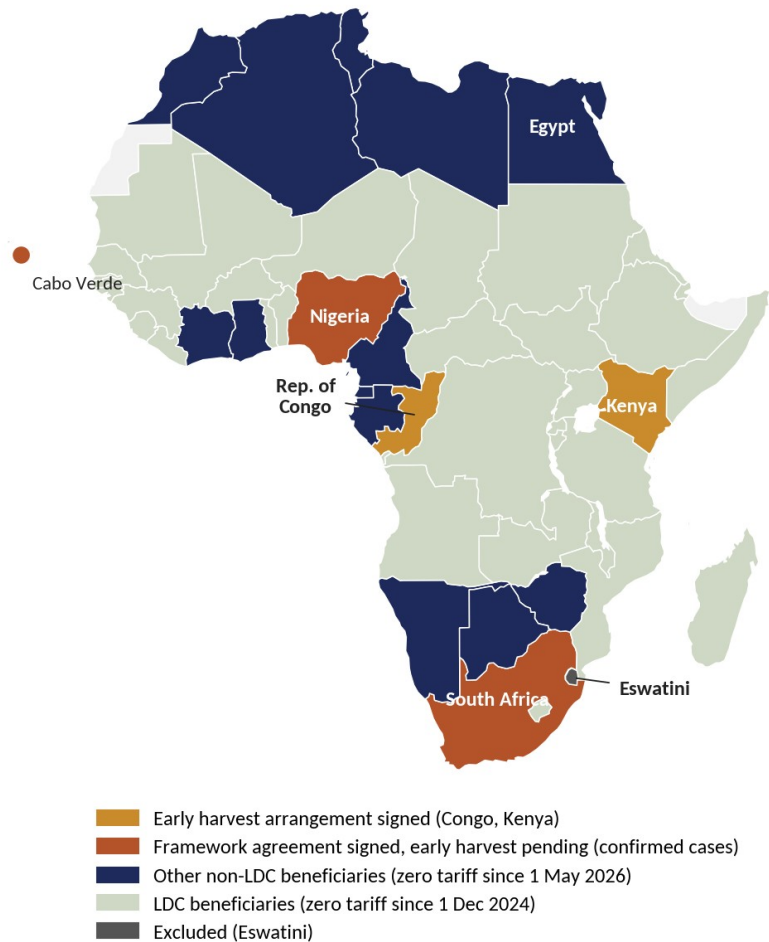


Figure 3. Africa's status under China's zero-tariff regime, September 2026. Only framework agreements confirmed in public sources are shown; 40 African countries had signed by 9 September 2026 (Xinhua; Ambassador Yu cited 38 in August).
Source: Tariff Commission Announcements 2024 No. 9 and 2026 No. 5; MOFCOM; PDIL. Base map: Natural Earth via Highcharts Map Collection.

Country	Status	What the partner conceded	Notes for Nigeria
Republic of Congo	Early harvest signed Nov 2025; in force 1 April 2026.	Zero tariffs on some Chinese machinery, equipment and chemicals; the full schedule sits in an annex not publicly analysed.	Rules of origin allow two-way cumulation between China and Congo. Congo is a CEMAC customs union member, as Nigeria is in ECOWAS.

Country	Status	What the partner conceded	Notes for Nigeria
Kenya	Early harvest signed 24 March 2026; in force from 1 May 2026.	Commitment to "further open its market to Chinese products"; schedule not published.	Kenya is in the EAC customs union; how it reconciled concessions with the EAC tariff is not public. Some Kenyan press reports linked US pressure over AGOA renewal to the deal. Early data, not yet attributable to the preference: avocado exports to China +63% and green coffee +140% by volume, May to August 2026.
South Africa	Framework signed Feb 2026; early harvest still being negotiated within SACU as of mid-2026.	Not concluded.	China's ambassador said China "will not seek reciprocity". A South African official said commitments could be "in form, not substance". Shows room for a low-reciprocity outcome.
Cabo Verde	Framework signed 9 Sept 2026; early harvest substantially concluded.	Not public.	Signals acceleration: small economies are moving fast.
Nigeria	Framework signed 26 March 2026.	None yet.	Negotiating window open; leverage highest before 2028.

The pattern is clear. China offers the same headline benefit to everyone: binding zero tariffs on all lines. What differs is what each partner gives in return, how rules of origin are drafted, and what accompanying commitments are secured. That is where negotiating skill will separate outcomes.

SECTION 4

What is at stake for Nigeria

A structural deficit, a narrow dutiable base, and real upside in diversification

4.1 The trade picture

Indicator	Value
Nigeria-China total trade, 2025	Above US\$28bn (+28%)
China's exports to Nigeria, 2025 (China-reported)	US\$24.9bn
China's imports from Nigeria, 2025 (derived)	About US\$3.1bn
Bilateral deficit, 2025	About US\$21.8bn
Cumulative deficit, 2021-2025	About US\$96bn
Imports from China per US\$1 of exports, 2025	About US\$8
Share of Nigerian exports already MFN duty-free	About 88% (oil, LNG, ores, copper)
China's imports from Nigeria, H1 2026	US\$2.3bn (+80%); January to April 2026 already +112%, before the preference applied on 1 May
Chinese direct investment in Nigeria, 2025	US\$690m (+103%)

Sources: GACC data via MOFCOM, Trading Economics and Chinese diplomatic missions; PDIL calculations. See the companion Excel model.

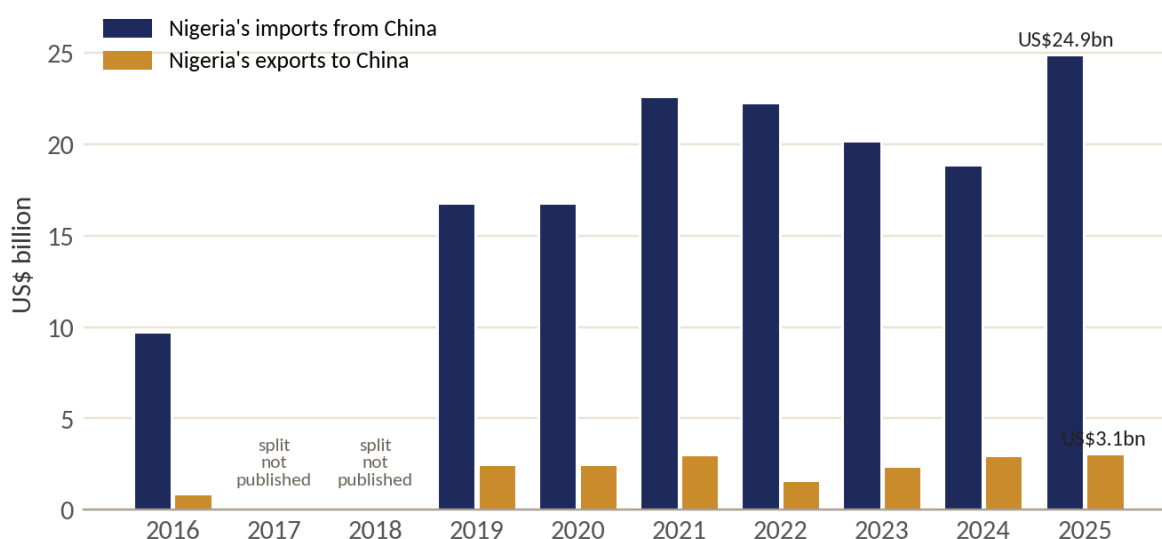


Figure 4. Nigeria-China goods trade, 2016-2025 (China-reported, US\$ billion). The 2017-2018 split is not published; the 2016, 2019, 2020 and 2025 export figures are derived from reported totals.

Source: GACC via Chinese Embassy, MOFCOM, Trading Economics; PDIL calculations.

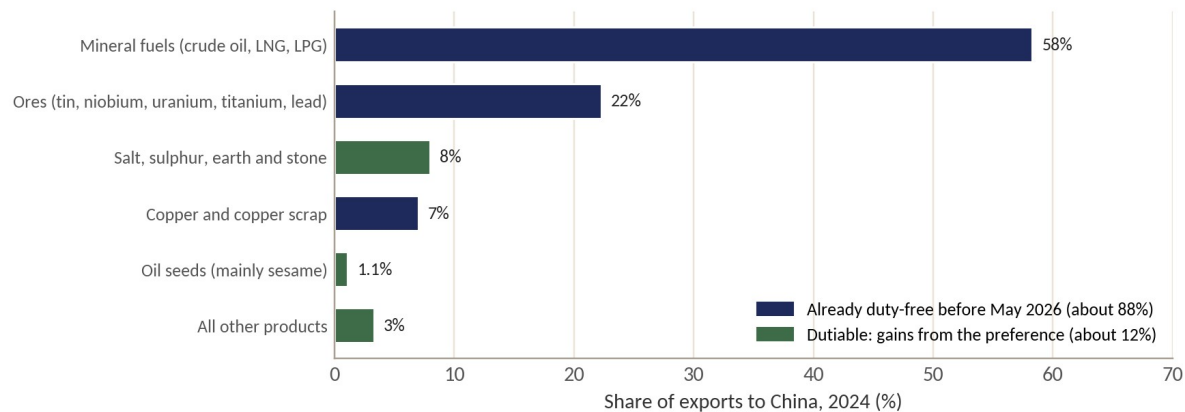


Figure 5. What Nigeria sells to China, 2024. Most of it already entered duty-free; the preference bites only on the green bars.

Source: UN Comtrade (China reporter) via Trading Economics; PDIL classification.

The zero tariff changes the terms for barely one-eighth of what Nigeria sells to China today. Its value lies in what Nigeria can build to sell tomorrow.

4.2 What the model shows

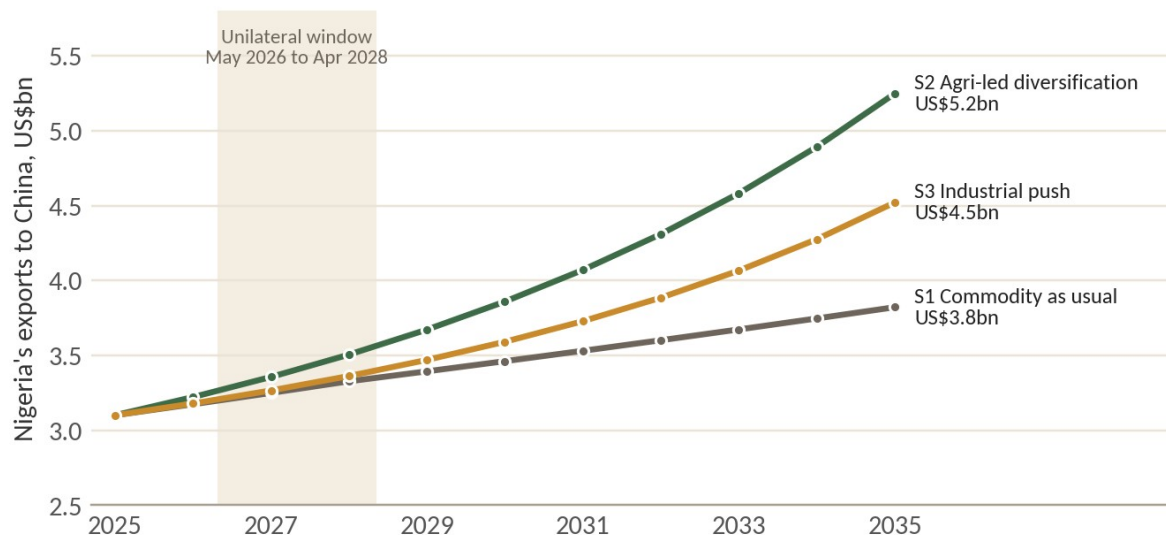


Figure 6. Nigeria's exports to China under three scenarios, 2025-2035 (US\$ billion). Only S1 assumes the preference lapses in April 2028.

Source: PDIL China-Africa Zero-Tariff Trade Model.

PDIL's scenario model projects Nigeria's exports to China to 2035 under three scenarios. Its central message is that the value of the arrangement lies less in tariff savings than in what it enables: diversification, processing and jobs.

Indicator (Nigeria)	S1 Commodity as usual, preference lapses 2028	S2 Agri-led diversification, preference locked in	S3 Industrial push, preference locked in
Exports to China, 2035	About US\$3.8bn	About US\$5.2bn	About US\$4.5bn

Indicator (Nigeria)	S1 Commodity as usual, preference lapses 2028	S2 Agri-led diversification, preference locked in	S3 Industrial push, preference locked in
Non-oil, non-mineral share of exports, 2035	About 13%	About 37%	About 34%
Processed goods share, 2035	About 1%	About 2%	About 10%
Cumulative tariff savings, 2026-2035	About US\$21m	About US\$414m	About US\$490m

Locking in the preference is worth roughly US\$0.4bn to US\$0.5bn in direct duty savings over ten years, and far more in the export capacity it can support if paired with SPS access and processing investment. It will not close the trade deficit. Imports from China are eight times Nigeria's exports and grow from a much larger base. The arrangement should therefore be judged as an industrial and diversification instrument, not as a trade-balance fix.

4.3 What China is likely to seek

- Tariff reductions on Chinese machinery, equipment, vehicles, chemicals and electrical goods, as in the Congo arrangement.
- Commitments on investment protection and facilitation for Chinese firms, including in free zones and the solid minerals sector.
- Reciprocal customs and SPS facilitation, and progress towards later modules on services and digital trade.

SECTION 5

Nigeria's constraints

ECOWAS, industry, revenue and geopolitics

5.1 The ECOWAS Common External Tariff

Nigeria applies the ECOWAS Common External Tariff (CET), with five bands of 0%, 5%, 10%, 20% and 35%, plus limited trade defence and adjustment instruments. In a customs union, a member cannot freely cut tariffs for one outside partner without affecting its neighbours, who then face goods entering through Nigeria on different terms. PDIL found no ECOWAS Commission position on the CAEPSD, and no public account of how Congo (in CEMAC) or Kenya (in the EAC) reconciled their concessions with their customs unions. This must be clarified early: Nigeria's ECOWAS CET obligations constrain what it can offer China bilaterally, and any tariff commitment would need to be consistent with them.

5.2 Industrial exposure

Nigerian manufacturers already compete with Chinese imports in textiles, steel products, plastics, footwear, furniture, lighting and light electrical goods. The Nigerian Institute of International Affairs, the Lagos Chamber of Commerce and Industry and the Manufacturers Association of Nigeria warned in August 2026 that without deliberate industrial policy, Nigeria risks becoming a "dumping ground" rather than a beneficiary. How any concessions treat the sensitive sectors that the MTNDP and national industrial policy seek to build will be a central test of the arrangement.

5.3 Customs revenue

Import duties are a material source of federal revenue at a time of fiscal pressure. Nigeria recorded about US\$13bn of imports from China in 2025, and Nigeria Customs collected N7.28 trillion in 2025. PDIL estimates suggest that a broad phase-out of duties on capital goods and industrial inputs from China would cost in the order of 8% of customs revenue at full phase-in, which is why phasing and product scope matter. The estimate draws on PDIL's internal trade scenario model.

5.4 Geopolitics

Nigeria's foreign economic policy prizes strategic autonomy. The Kenyan experience, where press reports linked US trade preferences to its China arrangement, shows that deals with China can attract attention from other partners. Nigeria's framing matters. At signature, Minister of Industry, Trade and Investment Jumoke Oduwole said that for Nigeria, trade "is not about blocs or ideology" but about "delivering real outcomes for our people."

SECTION 6

Nigeria's leverage

Why the window before 2028 favours Nigeria

- **Scale and signalling.** Nigeria is China's largest export market in West Africa and among its largest in Africa. A Nigerian arrangement carries continental demonstration value that smaller economies cannot offer.
- **Timing.** China wants early harvests concluded across the continent before the unilateral window closes. Nigeria gains leverage by moving with purpose before the deadline, and loses it if it negotiates under the pressure of an imminent lapse.
- **Critical minerals and processing.** Nigeria's lithium, tin, niobium and other minerals, and its local processing policies, are of direct interest to Chinese industry.
- **Low-reciprocity precedent.** China has signalled to South Africa that it will not insist on full reciprocity. This suggests there may be room for comparable treatment of Nigeria.

SECTION 7

Policy considerations for Nigeria

Six questions that will shape the outcome before April 2028

Nigeria's choices before the unilateral preference expires turn on six questions. PDIL sets them out here to inform public and business debate.

Question	Why it matters	What the evidence shows
1. Lock in duty-free access?	The unilateral preference ends on 30 April 2028. An early harvest arrangement would make it permanent and binding.	Kenya (in force since 1 May 2026) and the Republic of Congo have locked in access. China had signed framework agreements with 40 African countries by 9 September 2026 (Xinhua; Ambassador Yu cited 38 in August).
2. What to offer in return?	China usually asks partners to open their own markets. Nigeria applies the ECOWAS Common External Tariff.	A broad phase-out of duties on Chinese capital goods and industrial inputs would cost in the order of 8% of customs revenue at full phase-in (Section 5.3).
3. Better rules of origin?	Chinese inputs count as local; inputs from other African countries count only if both have a free trade agreement with China.	Current rules weaken ECOWAS and AfCFTA value chains, for example Ghanaian cocoa processed in Nigeria.
4. Faster SPS access?	Most Nigerian farm exports need GACC approval before the tariff matters.	Sesame and peanuts have access; a wild aquatic products protocol was signed in August 2026; others are pending.
5. Protect industry and revenue?	Textiles, steel articles, footwear, furniture and vehicles compete directly with Chinese imports.	Nigeria imports about US\$8 from China for every US\$1 it exports; the 2025 deficit was about US\$21.8bn.
6. Coordinate with ECOWAS?	Tariff concessions by one customs-union member affect its neighbours.	No public ECOWAS position yet; how Kenya and Congo handled their customs unions is not public.

These questions call for early consultation with the organised private sector, state governments and ECOWAS partners, and for a transparent account of costs and benefits before any commitments are made.

SECTION 8

Priority products for Nigerian exporters

Where SPS access, processing investment and export promotion should concentrate

Nigeria's engagement with China needs a product focus. PDIL selected the products below on five criteria: the tariff margin the preference removes; Nigeria's existing export base; Chinese demand and the availability of a GACC approval path; processing and jobs potential, including the ability to meet the 40% value content rule; and food security risk. The list is non-oil by design.

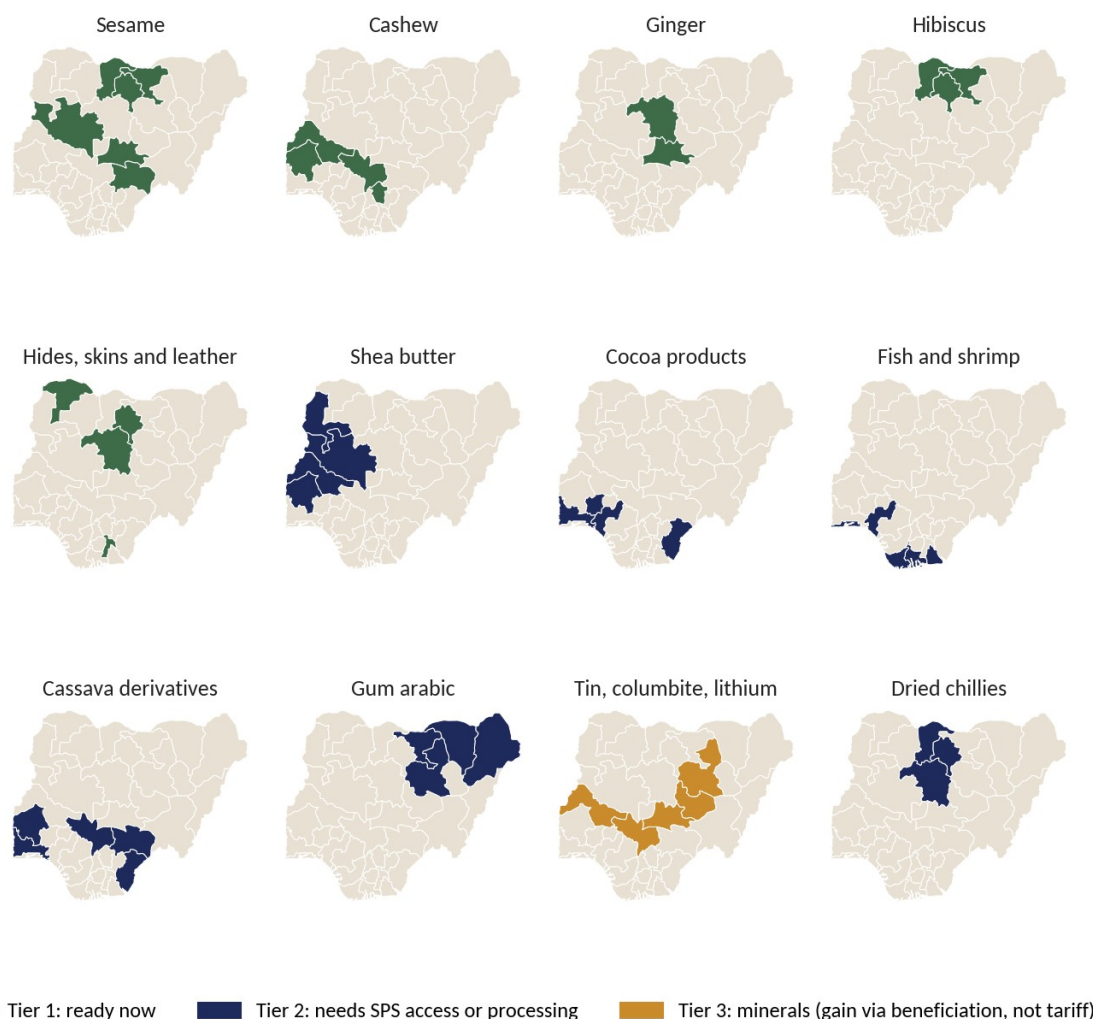


Figure 7. Main producing states for priority products, by tier

Source: PDIL, drawing on sector association and state government sources; indicative, not exhaustive. Base map: Natural Earth via Highcharts Map Collection.

Product	Tier	Tariff removed	China market access (SPS)	Processing target	Main states
Sesame seed	1	10% MFN (HS 1207.40)	On GACC approved list; facilities register via NEPC (competent authority since Nov 2022).	Hulled, roasted, sesame oil	Jigawa, Kano, Katsina, Nasarawa, Benue, Niger

Product	Tier	Tariff removed	China market access (SPS)	Processing target	Main states
Cashew	1, provisional	In shell 20% MFN, 5% provisional; shelled 10% MFN, 7% provisional	Named beneficiary. Confirm access for kernels. Tier 1, provisional: confirm tariff line/SPS status.	Graded and roasted kernels	Kogi, Oyo, Enugu, Kwara
Ginger	1	15% MFN (HS 0910.11/12)	GACC-approved; shipped since 2023.	Dried split, powder, oleoresin	Kaduna (Southern Kaduna), Nasarawa
Hibiscus (zobo)	1, provisional	8% MFN (HS 1211.90)	Named beneficiary; confirm. Tier 1, provisional: confirm tariff line/SPS status.	Dried calyces, extracts	Kano, Jigawa, Katsina
Hides, skins, goat leather	1, provisional	Raw goat skins 9% (one source 0%); wet-blue goat leather 14% MFN, 10% provisional	Goat leather named beneficiary. Tier 1, provisional: confirm tariff line/SPS status.	Finished leather and leather goods (not wet blue)	Kano, Sokoto, Kaduna, Abia
Bone granules, activated carbon	1, provisional	To verify by HS line	Both cleared duty-free in 2026. Tier 1, provisional: confirm tariff line/SPS status.	Gelatine inputs; activated carbon	Kano, Lagos; palm belt (Edo, Delta, Akwa Ibom, Cross River)
Shea butter	2	20% MFN (HS 1515.90, fallback line)	Confirm; candidate for Green Channel 2.0 low-risk route.	Refined butter, cosmetic inputs	Niger, Kwara, Oyo, Kebbi
Cocoa products	2	Beans 0% provisional (no margin); cocoa butter 22% MFN, 10% provisional	Confirm.	Butter, cake, powder	Ondo, Cross River, Osun, Ogun
Fish and shrimp	2	To verify by HS line	Wild aquatic products protocol signed August 2026; GACC implementing notice awaited.	Frozen, processed shrimp and fish	Lagos, Rivers, Bayelsa, Akwa Ibom, Ondo
Dried chillies	2	To verify by HS line	Opened continent-wide under Green Channel 2.0.	Dried, ground	Kano, Kaduna, Katsina
Gum arabic	2	To verify by HS line	Confirm.	Graded, kibbled	Borno, Yobe, Bauchi, Jigawa
Cassava derivatives	2	To verify by HS line	Named beneficiary; confirm.	Starch, chips, high-quality cassava flour	Benue, Ogun, Oyo, Cross River, Kogi
Tin, columbite, lithium	3	0% (already duty-free at MFN)	Not required.	Concentrates, ingots, lithium processing	Plateau, Bauchi, Nasarawa, Kwara, Kogi

Tier 1 (ready now) products already reach China in volume and gain immediately from the preference. Cashew, hibiscus, hides and goat leather, and bone granules and activated carbon are marked **Tier 1, provisional: confirm tariff line/SPS status** until their China tariff line and SPS status are confirmed. **Tier 2** products need SPS access or processing investment before the preference pays. **Tier 3** minerals already enter China duty-free;

Nigeria's gain lies in beneficiation requirements and investment commitments in the later modules, not in the tariff.

Handle with care

- **Food staples.** Keep soybean, maize, sorghum and cassava out of the first export push, or attach domestic price-monitoring triggers. Business groups have already flagged the risk to food prices.
- **Excluded or quota products.** Natural rubber is excluded from the preference for non-LDCs, which matters for Edo, Delta and Ogun. Cotton and fertiliser, including urea, gain zero duty only within China's tariff quotas.
- **Verification.** Tariff rates marked 'to verify' must be checked against China's 2026 tariff schedule, and SPS status confirmed product by product with NAQS and NAFDAC before this list is relied on for policy or export decisions.

Sesame and ginger are the confirmed early wins; cashew, hibiscus, finished leather, bone granules and activated carbon are provisional early wins until tariff line and SPS status are confirmed. Shea, cocoa products, fish and cassava derivatives are where negotiation on SPS access and processing investment will decide the outcome.

SECTION 9

Risks and mitigations

Risk	Mitigation
Negotiations run into the 2028 deadline, weakening Nigeria's position	Timely negotiating mandate.
ECOWAS partners object to concessions	Prior consultation with the ECOWAS Commission; consistency with the CET; regional cumulation as a shared benefit.
Domestic industry opposition	Transparent sensitive list; safeguards; consultation with MAN, NACCIMA and LCCI from the mandate stage.
Revenue loss larger than expected	Careful phasing and product scope to limit revenue loss; revenue monitoring by NCS.
Weak implementation after signature	Joint committee, annual reporting through FMBEP, KPIs tied to the MTNDP.
Geopolitical friction with other partners	Frame the arrangement as development-focused and WTO-consistent; maintain parallel engagement with other partners.

SECTION 10

Indicators to track the partnership

Managing the arrangement as a delivery commitment

Indicator	Baseline	Target
Early harvest arrangement concluded and in force	Not concluded	In force before 30 April 2028
Preference utilisation rate	Not measured	75% by 2028
Non-oil, non-mineral share of exports to China	About 12%	20% by 2028; 35% by 2035
Processed goods share of exports to China	About 1%	3% by 2028; 10% by 2035
Nigerian agricultural products with GACC access	To be compiled	Baseline + 8 by 2028
Chinese investment in Nigerian processing and manufacturing	US\$690m (2025, all sectors)	Tracked annually by sector
Export cover (exports as share of imports from China)	About 12%	Rising trend; 15% by 2030

These indicators should sit within the MTNDP 2026-2030 results framework and be reported through the ministerial performance system, so that the arrangement is managed as a delivery commitment and not as a diplomatic event.

Glossary

Term	Meaning
CAEPSD	China-Africa Economic Partnership for Shared Development
CET	ECOWAS Common External Tariff (bands of 0, 5, 10, 20 and 35%)
Early harvest	Interim arrangement that binds zero tariffs before a fuller agreement
Enabling Clause	WTO provision allowing preferential treatment for developing countries
GACC	General Administration of Customs of China
LDC	Least developed country
MFN	Most-favoured-nation tariff, the standard rate China charges WTO members
MOFCOM	Ministry of Commerce of China
SACU	Southern African Customs Union
SPS	Sanitary and phytosanitary (food safety and plant and animal health) rules

Independence, version and citation

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