

FOCAC INTELLIGENCE

Trade Series | Policy Brief

Making Origin Work for Nigeria

Rules of origin, certification and value addition under China's zero-tariff regime for Africa

AT A GLANCE

1 May 2026

Zero tariffs in force for Nigeria

40%

Regional value content threshold

12%

of Nigerian exports to China are dutiable and could gain

To confirm

Nigeria certificate-issuing authority



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Companion products: China-Africa Zero-Tariff Trade Model (Excel); The China-Africa Economic Partnership for Shared Development: Explainer (public edition)

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Key messages

Origin, not the tariff, now decides who benefits

For senior decision-makers

- Since 1 May 2026, Nigerian goods enter China duty-free, but only if they prove Nigerian origin under GACC Announcement 2026 No. 54. Origin, not the tariff, now decides who benefits.
- For raw agricultural exports such as sesame, cashew, ginger and hides, origin is easy to prove. The binding constraints are China's sanitary and phytosanitary (SPS) approvals, grading, logistics and certification capacity.
- For processed goods, the 40% regional value content test is achievable where Nigerian raw materials are processed in Nigeria. This is the space where the preference can support industrialisation.
- Two design features need attention. Chinese inputs count as Nigerian (Article 7), which rewards the assembly of Chinese kits. Inputs from other African countries count only if both countries have a free trade agreement with China, which weakens ECOWAS and AfCFTA value chains.
- As of 30 September 2026, Nigeria has no publicly designated authority issuing certificates of origin for China. Every week of delay leaves duty savings unclaimed. Certificates can be issued retrospectively within one year of shipment, so exports since 1 May can still be covered.
- The window for non-LDCs closes on 30 April 2028 unless Nigeria concludes an early harvest arrangement under the CAEPSD. Rules of origin should be a core Nigerian negotiating issue in that arrangement.

Priority actions (next 90 days): designate and gazette the certifying authority; launch digital certificates on the Nigeria Trade Hub; run a retrospective certification drive for shipments since 1 May 2026; submit SPS dossiers for five priority products under Green Channel 2.0; and table Nigeria's origin asks for the early harvest negotiation.

SECTION 1

Context: what changed on 1 May 2026

China's zero-tariff treatment for Africa rests on two instruments. The State Council Customs Tariff Commission (Announcement 2026 No. 5, 28 April 2026) set zero tariffs for 20 African countries that are not least developed countries (LDCs), Nigeria among them, from 1 May 2026 to 30 April 2028. The General Administration of Customs of China (GACC) issued the rules of origin in Announcement 2026 No. 54, effective the same day. Africa's 33 LDCs have enjoyed zero tariffs on all tariff lines since 1 December 2024. With the 20 non-LDCs added, 53 of Africa's 54 states are covered; Eswatini is excluded because it recognises Taiwan.

For Nigeria, the offer is significant in principle and narrow in practice. About 88% of what Nigeria sold to China in 2024 (crude oil, LNG, tin and niobium ores, copper) already entered at a zero most-favoured-nation (MFN) rate. The preference therefore matters most for the remaining 12%: sesame and other oilseeds, cashew, ginger, hides and skins, processed agricultural products, and the manufactured goods Nigeria hopes to export in future. That slice is small today, but it is where jobs, rural incomes and industrial capability sit.

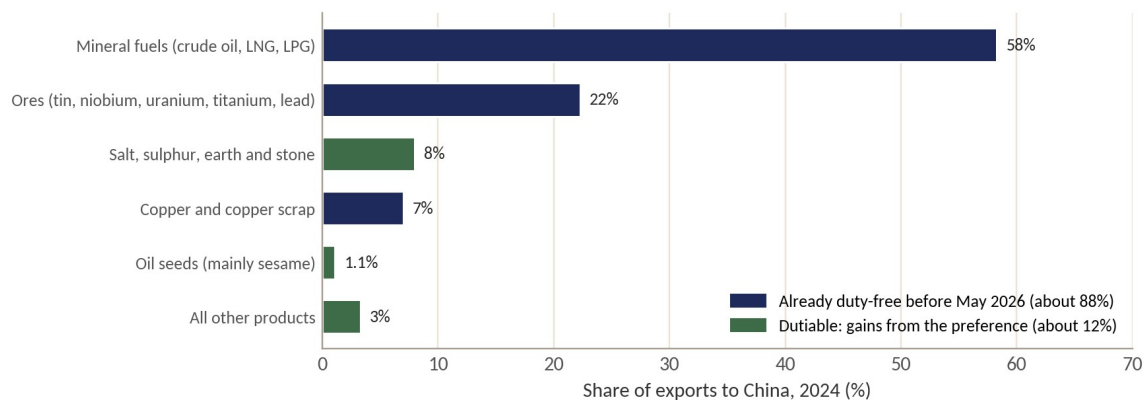


Figure 1. What Nigeria sells to China, 2024. The preference bites only on the green bars.

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

Indicator	Value	Source
Nigeria-China total trade, 2025	Above US\$28bn (+28%)	Chinese Consulate, Lagos
China's exports to Nigeria, 2025	US\$24.9bn (record)	GACC via Trading Economics
China's imports from Nigeria, 2025	About US\$3.1bn (derived)	PDIL estimate from GACC totals
Share of Nigerian exports already MFN duty-free (2024)	About 88%	PDIL calculation, UN Comtrade (China reporter)
China's imports from Nigeria, H1 2026	US\$2.3bn (+80% year on year)	Ambassador Yu Dunhai (14 August 2026)
Nigeria-China bilateral trade, H1 2026	US\$18bn (+35%)	Ambassador Yu Dunhai (14 August 2026)
Growth in May and June 2026 (first months of preference)	Above 40% each month	Chinese Consul-General, Lagos

The H1 2026 surge should be read with care. It compares January to June with the same period in 2025, so four of the six months predate the preference, and no published breakdown separates oil and gas from non-oil goods. Imports from Nigeria were already up 112% in January to April 2026, before the preference applied on 1 May; the preference coincides with continued growth rather than explaining it. What the early evidence does show is that Nigerian exporters of sesame, bone granules, propane, activated carbon and similar products have

begun to claim duty savings. Reported examples include about US\$11,000 saved per 100 tonnes of sesame and about US\$450,000 a year on 7,000 tonnes of cattle bone granules.

SECTION 2

How the rules of origin work

Rules of origin decide whether a product is Nigerian for tariff purposes. They exist to stop third-country goods from being routed through Nigeria to claim a preference meant for Nigerian producers. Announcement No. 54 sets the following rules for the 20 non-LDC beneficiaries.

Provision	What it says	What it means for Nigerian exporters
Wholly obtained (Art. 4)	Goods grown, harvested, mined, caught or born and raised in Nigeria.	Raw sesame, cashew nuts, ginger, hides, ores and fish qualify automatically.
Regional value content (Art. 3, 6)	RVC of at least 40%: (FOB value minus non-originating materials) divided by FOB value.	Processed goods qualify if non-originating inputs are below 60% of the export price.
Product-specific rules	A change in tariff heading or other product-specific requirement applies to listed products.	Exporters must check the annex for their HS code before relying on RVC.
Chinese inputs (Art. 7)	Materials of Chinese origin count as originating in the African exporting country.	Chinese machinery parts, chemicals or packaging do not count against the 40%.
Inputs from other African countries	Count as originating only where both countries have a free trade agreement with China (per GACC guidance).	Ghanaian cocoa or Nigerian sesame processed in Nigeria counts as foreign today.
De minimis (Art. 8)	Non-originating materials that fail the tariff-shift test are tolerated up to 10% of FOB value.	Small imported additives or packaging will not disqualify a product.
Insufficient processing (Art. 9)	18 listed operations do not confer origin: washing, sorting, repackaging, simple mixing, simple assembly, painting and similar.	Re-bagging imported sesame or relabelling goods in a Nigerian free zone will not qualify.
Direct transport (Art. 14)	Transit through third countries only under customs control, no further processing, maximum 6 months storage.	Shipments via Lome, Tema, Singapore or Port Klang hubs must keep documentary proof.
Certificate (Art. 15, 16)	Issued by the authorised body of the exporting country, in English, with a unique number; valid 1 year; retrospective issue allowed within 1 year.	Nigeria needs a designated, trusted issuer whose seals are registered with GACC.
Low-value exemption (Art. 21)	No certificate for consignments up to US\$1,000.	Useful for samples and cross-border e-commerce.

The regime closely follows China's rules for LDCs (GACC Decree No. 210 of 2013, updated by Decree No. 231 of 2017), which also use a 40% value-added test, accept Chinese inputs and apply a 10% de minimis. The main differences are the product-specific rules list and the conditional treatment of inputs from other African countries.

SECTION 3

Diagnosis: what the rules mean for Nigeria

3.1 For raw exports, origin is not the constraint; market access is

Sesame, cashew, ginger, shea nuts, hibiscus, soybean and hides are wholly obtained. They meet the origin test without calculation. What stops them is whether China allows the product in at all. Plant and animal products need GACC import approval, often through a bilateral protocol negotiated by the Nigeria Agricultural Quarantine Service (NAQS), followed by registration of Nigerian exporters and processing facilities.

Progress is real but uneven. China's Green Channel 2.0, live since 1 May 2026, removes the need for a bilateral protocol for low-risk products and offers six facilitation measures for medium and high-risk products (priority handling, grouped assessment, remote video inspection, combined missions, flexible document review and batch registration of enterprises). China has opened its market to coffee from all 53 countries (GACC Announcement 2026 No. 68, from 20 July 2026). Nigeria signed a protocol on wild aquatic products with China in August 2026. A consolidated, product-by-product list of Nigeria's GACC approvals is not publicly available and should be compiled by NAQS as a matter of priority.

3.2 For processed goods, the 40% test is achievable where Nigerian raw materials are used

The worked examples below apply Announcement No. 54 to typical Nigerian products. They are illustrative per-unit calculations, reproduced in the RoO_Test sheet of the companion model so that officials and exporters can test their own products.

Product	FOB (US\$)	Non-originating inputs	Chinese inputs	RVC	Result	Lesson
Hulled sesame seed	1,600/t	0	0	100%	Originating (wholly obtained)	Gains depend on SPS access, grading and logistics.
Sesame oil in EU-made packaging	2,400/t	150	0	94%	Originating	The processing case Nigeria should push.
Leather footwear with Italian soles (Aba, Kano)	30/pair	14	0	53%	Originating	Local tanning keeps value at home.
Garments from Indian or Turkish fabric	12/piece	8	0	33%	Not originating	Needs Nigerian textiles or a tariff-shift rule.
Cocoa butter from Ghanaian beans	100/unit	70	0	30%	Not originating	The cost of conditional African cumulation.
Solar panels assembled from Chinese cells	100/unit	0	85	100%	Originating	Only 15% true Nigerian content (Art. 7).

Two conclusions follow. First, agro-processing based on Nigerian crops clears the threshold comfortably, which strengthens the case for Special Agro-Industrial Processing Zones and export processing in sesame, cashew, shea, cassava derivatives, ginger and leather. Second, sectors that rely on imported intermediate inputs from outside China and Africa, such as garments, struggle to qualify unless the product-specific rules help or domestic input industries are built.

3.3 Article 7 rewards assembly of Chinese inputs

Because Chinese materials count as Nigerian, a plant that assembles Chinese components can qualify with very little Nigerian value added. The solar panel example passes with 100% calculated RVC but only 15% genuine domestic content. This creates two risks. The industrial risk is that the preference attracts screwdriver assembly rather than deep manufacturing. The integrity risk is that Nigeria becomes a routing point for goods with nominal processing, which could draw GACC verification actions against all Nigerian certificates. The solution is not to reject Chinese investment, but to pair it with a local content floor and credible verification.

3.4 Conditional African cumulation cuts against regional value chains

Inputs from other African countries count as originating only when both countries have a free trade agreement with China. Today that means cocoa from Ghana, cotton from Burkina Faso or sesame from Niger count as foreign in a Nigerian factory. If GACC treats early harvest arrangements as free trade agreements for this purpose, this favours countries that sign bilateral early harvest arrangements quickly, and it works against the logic of the AfCFTA and the ECOWAS trade liberalisation scheme, under which Nigeria aspires to be the region's processing hub. It is one of the strongest reasons for Nigeria to negotiate its own arrangement early, and to seek diagonal cumulation with ECOWAS partners as part of it.

3.5 The institutional gap is the most urgent problem

Announcement No. 54 requires certificates from an authorised body of the exporting country, with specimen seals and signatures registered with GACC. As of 30 September 2026, PDIL found no public notice designating Nigeria's issuing authority for this scheme, no exporter guidelines and no sensitisation programme. Candidate institutions already exist: the Nigeria Customs Service issues AfCFTA certificates through the Nigeria Trade Hub portal, and the Federal Ministry of Industry, Trade and Investment administers ECOWAS Trade Liberalisation Scheme certificates. South Africa offers a useful benchmark: the South African Revenue Service began issuing certificates on 1 June 2026 at nine customs branches, issued them retrospectively back to 1 May, and published clear procedures and a five-year record-keeping rule.

The cost of delay is concrete. Each shipment that enters China without a valid certificate pays the MFN duty or relies on a supplementary declaration with a tax guarantee. The one-year retrospective window means shipments made since 1 May 2026 can still be covered, but only if Nigeria acts before May 2027.

3.6 Other boundaries to note

- **Natural rubber is excluded** for non-LDCs (HS 4001, 4005 and 4002.80). This matters for rubber producers in Edo, Delta and Ogun.
- **Tariff-quota products** (including wheat, maize, rice, sugar, cotton and fertiliser such as urea) receive zero duty only within China's quota; out-of-quota rates remain.
- **The preference is temporary.** It ends on 30 April 2028 for Nigeria unless replaced by a binding arrangement under the China-Africa Economic Partnership for Shared Development (CAEPSD).

SECTION 4

Strategic response: five pillars

The goal is to raise the share of eligible Nigerian exports that actually claims the preference, move exports up the value chain, and protect the integrity of Nigerian origin. Five mutually reinforcing pillars are proposed.

Pillar 1: Certification and compliance infrastructure

- Designate and gazette a single certifying authority for the China scheme, register specimen seals and signatures with GACC through the Embassy in Beijing, and publish exporter guidelines.
- Issue certificates digitally through the existing Nigeria Trade Hub portal, and seek electronic data exchange with GACC, as China already operates for LDC certificates.
- Run a retrospective certification drive for all eligible shipments since 1 May 2026 before the one-year window closes.
- Set a service standard: certificates issued within 48 hours, at a published fee.

Pillar 2: Market access for priority products

- NAQS and NAFDAC to compile and publish Nigeria's current GACC approval status, product by product.
- Prepare Green Channel 2.0 dossiers for the priority products in the Annex, starting with Tier 1 (sesame and ginger; cashew, hibiscus, hides and leather, bone granules and activated carbon as provisional pending confirmation of tariff line and SPS status) and moving to Tier 2 (shea, cocoa products, fish and shrimp, dried chillies, gum arabic, cassava derivatives).
- Batch-register Nigerian processors and packhouses with GACC, and support traceability and aflatoxin and pesticide residue compliance through accredited laboratories.

Pillar 3: Value addition that qualifies

- Use the 40% RVC test as a design parameter for Special Agro-Industrial Processing Zones, free zones under NEPZA and state industrial parks. Priority lines: hulled and roasted sesame, sesame oil, processed cashew kernels, shea butter, dried ginger, cassava starch and chips, finished leather.
- Link the preference to the Medium-Term National Development Plan 2026-2030 targets for non-oil exports, agro-processing and manufacturing value added, so that ministries report on it through the national performance framework.
- Channel development finance (Bank of Industry, NEXIM, DBN) to processing investments that can demonstrate qualifying origin and firm Chinese buyers.

Pillar 4: Negotiate better origin terms in the CAEPPS early harvest

Options for Nigeria's origin asks, to be weighed by the negotiating team after consultation with industry, include:

- **Option: diagonal cumulation** with ECOWAS and AfCFTA partners, so that West African inputs count as originating in Nigeria.
- **Option: a local content floor** where Article 7 is relied on for Chinese inputs, with the level set on the basis of product-level evidence.
- **Option: favourable product-specific rules** for priority value chains, including leather, garments and processed foods.
- **Option: a standing SPS work programme** with deadlines, attached to the arrangement.

Pillar 5: Integrity and verification

- Risk-based post-issuance verification by the certifying authority, with an anti-circumvention unit that tracks unusual export surges in products Nigeria does not produce at scale.
- Clear penalties for false declarations, and cooperation protocols with GACC on verification requests.
- Use the scheme to address the mirror-data gap: China records roughly twice as much in exports to Nigeria as Nigeria records in imports from China, which may point to under-invoicing, transshipment or valuation differences.

SECTION 5

Implementation architecture

Institution	Role
Federal Ministry of Industry, Trade and Investment (FMITI)	Policy lead; designates the certifying authority; leads CAEPSD negotiations with the Nigerian Office for Trade Negotiations.
Nigeria Customs Service (NCS)	Candidate certifying authority through the Nigeria Trade Hub; verification and anti-circumvention; data exchange with GACC.
Nigerian Export Promotion Council (NEPC)	Competent authority for GACC food-facility registration since November 2022; exporter sensitisation; product-level export readiness; market intelligence on Chinese buyers.
Nigeria Agricultural Quarantine Service (NAQS) and NAFDAC	SPS protocols and dossiers; facility registration with GACC; laboratory testing and traceability.
Federal Ministry of Budget and Economic Planning (FMBEP)	Aligns actions with the MTNDP 2026-2030 results framework; tracks KPIs; links the programme to budget lines.
Ministry of Foreign Affairs and Embassy in Beijing	Registers seals with GACC; commercial diplomacy; buyer linkages.
Nigerian Office for Trade Negotiations (NOTN)	Technical lead on origin provisions and ECOWAS and AfCFTA consistency.
Presidential Enabling Business Environment Council (PEBEC)	Removes port, licensing and inspection bottlenecks for export consignments.
State governments	Aggregation, SAPZs, extension services and producer organisation for sesame, ginger, cashew and shea belts (for example Jigawa, Kano, Kaduna, Niger, Nasarawa, Benue, Oyo, Kogi).
Organised private sector	MAN, NACCIMA, LCCI and commodity associations: exporter feedback, compliance and investment.

90-day action plan

Timeframe	Action	Lead
Days 0-30	Designate and gazette the certifying authority; transmit specimen seals to GACC; publish interim exporter guidance.	FMITI, NCS, MFA
Days 0-30	Compile GACC approval status for all Nigerian agricultural products; select five priority products.	NAQS, NAFDAC, NEPC
Days 31-60	Launch digital certificates on the Nigeria Trade Hub; begin retrospective certification for shipments since 1 May 2026.	NCS

Timeframe	Action	Lead
Days 31-60	Exporter clinics in Lagos, Kano, Abuja, Port Harcourt and Onitsha; RVC self-assessment tool published.	NEPC, OPS
Days 61-90	Submit Green Channel 2.0 dossiers; request batch registration of exporters.	NAQS
Days 61-90	Adopt Nigeria's origin negotiating asks for the early harvest arrangement.	FMITI, NOTN
Days 61-90	First quarterly utilisation report to the Federal Executive Council through FMBEP.	FMBEP

SECTION 6

Risks and mitigations

Risk	Likelihood	Mitigation
Certifying authority not designated quickly; savings forgone	High	Presidential directive with a 30-day deadline; interim designation of NCS pending full arrangements.
Origin fraud or transshipment triggers GACC verification against Nigerian certificates	Medium	Risk-based verification, anti-circumvention unit, sanctions, cooperation protocol with GACC.
Preference attracts assembly with little local value	Medium	Local content floor in the early harvest; incentives tied to domestic value added.
Export push raises domestic food prices (sesame, soybean, cassava)	Medium	Focus on yield and processing investment; monitor domestic price indices; avoid staple grains in the first wave.
SPS non-compliance (aflatoxin, residues) leads to rejections	High	Accredited laboratories, traceability, exporter registration, farmer training through state extension.
Preference lapses in April 2028 without an early harvest arrangement	Medium	Conclude the arrangement by Q3 2027 so that preferential access continues without interruption.
Trade deficit widens as Chinese imports grow faster than exports	High	Treat the preference as an industrial tool, not a trade balance tool; pair it with trade defence capacity and domestic sourcing policies.

SECTION 7

Key performance indicators

Indicator	Baseline	Target Dec 2027	Target Apr 2028
Certifying authority designated and seals registered with GACC	No	Yes (by Dec 2026)	Yes
Preference utilisation: share of eligible exports entering China duty-free	Not measured	60%	75%
Certificates of origin issued (cumulative)	0	3,000	4,500
Average certificate turnaround	n/a	48 hours	24 hours
Nigerian agricultural products with GACC access	To be compiled	Baseline + 5	Baseline + 8
Non-oil, non-mineral share of exports to China	About 12%	18%	20%
Processed goods share of exports to China	About 1%	2%	3%
Early harvest arrangement concluded with improved origin terms	No	Yes	Yes

Targets are indicative and should be validated with FMITI, NEPC and FMBEP. The companion model allows the effect of higher utilisation and faster processing growth on exports, tariff savings and jobs to be tested directly.

ANNEX

Priority products for the zero-tariff window

Selection criteria: tariff margin removed; existing export base; Chinese demand and GACC approval path; processing and jobs potential, including ability to meet the 40% value content rule; and food security risk. The same list appears as Section 8 of the CAEPSD Explainer (public edition) and in the Priority_Products sheet of the companion model.

Product	Tier	Tariff removed	China market access (SPS)	Processing target	Origin and compliance watch-out
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	Aflatoxin and pesticide residue rejections
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	Raw nuts flow to Asian processors; value leaks
Ginger	1	15% MFN (HS 0910.11/12)	GACC-approved; shipped since 2023.	Dried split, powder, oleoresin	Moisture, mould, grading
Hibiscus (zobo)	1, provisional	8% MFN (HS 1211.90)	Named beneficiary; confirm. Tier 1, provisional: confirm tariff line/SPS status.	Dried calyces, extracts	Aggregation and cleaning standards
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)	Wet blue exports lock in low value
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	Veterinary certification for bone products
Shea butter	2	20% MFN (HS 1515.90, fallback line)	Confirm; candidate for Green Channel 2.0 low-risk route.	Refined butter, cosmetic inputs	Aggregation, quality, women's cooperatives' finance
Cocoa products	2	Beans 0% provisional (no margin); cocoa butter 22% MFN, 10% provisional	Confirm.	Butter, cake, powder	Imported beans count as foreign under current origin rules
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	Facility registration, cold chain

Product	Tier	Tariff removed	China market access (SPS)	Processing target	Origin and compliance watch-out
Dried chillies	2	To verify by HS line	Opened continent-wide under Green Channel 2.0.	Dried, ground	Aflatoxin control
Gum arabic	2	To verify by HS line	Confirm.	Graded, kibbled	Insecurity in producing zones
Cassava derivatives	2	To verify by HS line	Named beneficiary; confirm.	Starch, chips, high-quality cassava flour	Food security: apply price-monitoring triggers
Tin, columbite, lithium	3	0% (already duty-free at MFN)	Not required.	Concentrates, ingots, lithium processing	Gain comes from beneficiation and investment terms, not tariff

Tier 1: ready now; cashew, hibiscus, hides and goat leather, and bone granules and activated carbon are **Tier 1, provisional: confirm tariff line/SPS status**. **Tier 2:** needs SPS access or processing investment. **Tier 3:** already duty-free at MFN; gains depend on beneficiation and investment terms. Natural rubber (excluded) and quota products such as cotton and urea are deliberately left off. Rates marked 'to verify' must be checked against China's 2026 tariff schedule.

Glossary

Term	Meaning
Certificate of origin	Document proving where goods were made, needed to claim the zero tariff
De minimis	Small share of non-originating inputs tolerated (10% of FOB value)
Direct transport	Rule that goods must travel to China without processing in third countries
FOB	Free on board: export price at the port of loading
GACC	General Administration of Customs of China
LDC	Least developed country
MFN	Most-favoured-nation tariff, the standard rate China charges WTO members
NAQS	Nigeria Agricultural Quarantine Service
NEPC	Nigerian Export Promotion Council, competent authority for GACC facility registration
RVC	Regional value content: (FOB value minus non-originating materials) divided by FOB value
SPS	Sanitary and phytosanitary (food safety and plant and animal health) rules

Independence, version and citation

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