



AFRICAN SEZs
ANNUAL MEETING
Luanda . ANGOLA | November 26 . 28 . 2025

AFRICAN SEZs

CATALYZING SUSTAINABLE INDUSTRIAL
INVESTMENT AND GLOBAL VALUE CHAINS
INTEGRATION.



Nov
26TH

Nov
28TH

Luanda
ANGOLA



AFRICA
ECONOMIC
ZONES
ORGANIZATION

SUMMARY REPORT
2025

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EXECUTIVE SUMMARY



The Africa Economic Zones Organization (AEZO) and the African Union Commission (AUC) organized the African Special Economic Zones (SEZs) Annual Meeting 2025 in Luanda, Angola, from 26th to 28th November 2025.

Entitled ***“African SEZs: Catalyzing Sustainable Industrial Investment and Global Value Chains Integration”***, the event brought over **400 distinguished guests**, including 57 African SEZs representing 37 countries, ministers, heads of SEZs, senior policymakers, private-sector leaders, international institutions, financial partners, and industrial development experts supporting the growth of African SEZs.

Hosted by the Luanda-Bengo SEZ (ZEE) with the support of the Government of Angola, this milestone edition took place in conjuncture with Angola's 50th Independence Anniversary, which lent the event both symbolic and strategic weight. The African SEZs Annual Meeting 2025 also hosted the Africa Sustainable Investment Summit (ASIS), a high-level platform for investors, policymakers, and partners to explore sustainable and inclusive investment opportunities across Africa.

The meeting is designed to reinforce SEZs as drivers of diversified, competitive and sustainable industrial growth while promoting collaboration across the continent. Participants had the chance to partake in high-level discussions, policy roundtables, and technical sessions elaborated to examine key priorities shaping Africa's industrial trajectory and promote best practices within African SEZs, pertaining to global sustainability standards, digital transformation, and diversified industrial ecosystems.

The 2025 edition of the African SEZs Annual Meeting was a resounding success, given the shifting dynamics of the global economic landscape and its repercussions on Africa's industrialization. This is coupled with the fallback from geopolitical crises, declining FDI inflows, and disruptions in global supply chains, which present both challenges and opportunities for the continent. African SEZs hold immense potential to attract impactful investments, catalyze job creation, and drive sustainable industrialization while addressing critical global priorities such as climate action, food security, and digital transformation.

According to the AEZO outlook 2025, Africa is home to more than 286 operational SEZs across 50 African countries and 152 Ongoing projects, spanning 200,000 Ha and mobilizing 3.2 trillion dollars in investments, dedicated mainly to Agribusiness, textiles, automotive, and aerospace sectors.

The opening ceremony was marked by inaugural speeches from **Ms. Augusta Fortes**, Secretary of State for Commerce and Industry of Angola, followed by keynote address from **H.E. Nardos Bekele Thomas**, CEO of AUDA-NEPAD, as well as **Mr. Claver Gatete**, Executive Secretary of the United Nations Economic Commission for Africa (UNECA).



A STRATEGIC CHOICE OF HOST : **ANGOLA'S INDUSTRIAL AMBITIONS ON DISPLAY**

Luanda — one of Africa's fastest-transforming capitals — provides a fitting backdrop for the 10th anniversary gathering. As noted across the concept note, the city is home to significant industrial infrastructure, including the Port of Luanda, major logistics corridors, and the expanding Luanda-Bengo SEZ, which is driving manufacturing growth and attracting international investment.

By hosting the meeting, Angola will showcase its progress in industrial diversification, improvements in governance, and renewed efforts to build an investor-friendly environment — all aligned with national priorities for the post-oil economy.

AEZO AT 10 YEARS : **A GROWING CONTINENTAL NETWORK**

Founded in 2015 by Tanger Med Group, AEZO has grown into a continental association with **97 members from 47 countries**, reflecting the increasing centrality of SEZs in Africa's development strategy.

Over the past decade, the Annual Meeting has been held in regional hubs across the continent including Accra, Abuja, Nairobi, Tangier and Addis Ababa, evolving into the flagship institutional platform for African SEZ cooperation.

SPECIAL MENTIONS : KEY STATEMENTS FROM THE AFRICAN SEZs ANNUAL MEETING 2025 OPENING CEREMONY



Global investments are facing persistent challenges — from geopolitical uncertainty to disrupted supply chains and tightening financing conditions — Special Economic Zones remain essential tools for African countries seeking to attract investment, boost exports, and strengthen competitiveness

H.E. Augusta Fortes, Secretary of State for Commerce & Services, Ministry of Industry & Commerce of the Republic of Angola.

SEZ must become more than just industrial parks; they must evolve into integrated ecosystems capable of driving Africa's economic transformation.

H.E. Bekele-Thomas, CEO of AUDA-NEPAD



With integrated strategies, Special Economic Zones can transform fragmented markets into continental corridors of production and prosperity, making 'Made in Africa' not only a mark of origin, but a standard of excellence.

Mr. Claver Gatete, Executive Secretary of the United Nations Economic Commission for Africa (UNECA)

The African SEZs Annual Meeting is a timely reminder of the importance of Special Economic Zones as engines of economic diversification, industrial upgrading, and regional value-chain development.

H.E. Wemkele Mene, Secretary General of the African Continental Free Trade Area (AfCFTA)



UNLOCKING AFRICA'S INDUSTRIAL POTENTIAL THROUGH SEZs : PATHWAYS TO SUSTAINABLE GROWTH

Courtney Fingar

Founder & CEO, Fingar Direct Investment
Moderator



Andreas Jahn
Senior International Manager



The discussion on Africa's industrial potential is a long-standing topic that has incurred many outlooks and polarized views. At the African SEZs Annual Meeting 2025, the event emphasized the important role of strong governance and effective institutional frameworks as a cornerstone for high-performing SEZs across Africa. Clear regulations, transparent processes, and modern PPP management models were highlighted as essential to attract investment and enhance competitiveness.

The African Continental Free Trade Area (AfCFTA) Secretariat, in this sense, also plays a transformative role in positioning SEZs

as regional hubs capable of building integrated value chains and strengthening Africa's industrial base. Sustainability also emerged as a key driver of future competitiveness, with green industrialization, renewable energy integration, and ESG-aligned operations increasingly shaping investor expectations.

Nowadays, shifting African SEZ strategies is a topic of high-sensitivity, resting on how to prioritize high-added value production, local supplier-base development, and skills alignment, to ensure that SEZ-led growth translates into broader economic opportunities and quality employment across the continent.

A success story that has emerged from this analysis is the Tanger Med Model, which has shown great success in less than 20 years, thanks to its PPP structure that combines and facilitates access to both port and industrial platforms.

AEZO OUTLOOK 2025 & UNIDO INDUSTRIAL PARKS PLATFORM (IPP)



Supporting the development of African SEZs is only feasible when we take into account empirical data that shapes decision-making and steers efforts in the right direction. The latest statistics shared on AEZO Atlas project-the largest database of African SEZs, summarizes development trends and growth trajectories of this dynamic community.

Interpretation of said statistics offer valuable insights, putting into focus the main challenges and opportunities facing African SEZs, all while emphasizing their role among Global Value Chains :

- **Strengthening management structures** to improve efficiency and attract more investment.
- **Digitizing processes** to boost operational efficiency and competitiveness.
- **Diversifying into high-growth sectors**, which could help SEZs reduce reliance on traditional industries, and unlock new economic opportunities.
- **Leveraging strategic locational advantages**, supported by a strong continental market- the AfCFTA.
- **Promoting unique business value proposition** and aggressive investment promotion.

AFRICA'S SUSTAINABLE GROWTH IMPERATIVES : SEZs DRIVING INVESTMENT AND GLOBAL VALUE CHAINS

The African SEZs Annual Meeting 2025 was the ideal opportunity to examine the strategic role of Special Economic Zones in promoting sustainable industrial growth, attracting investment, and enhancing Africa's integration into global value chains.

Africa's sustainable growth imperatives increasingly hinge on the continent's ability to attract investment, diversify production, and integrate more deeply into global value chains. Special Economic Zones (SEZs) play a central role in this transformation, serving as strategic platforms that concentrate infrastructure, regulatory incentives, and industrial capabilities.

By fostering competitive manufacturing ecosystems, SEZs enable African economies to capture higher value-added activities, promote technology transfer, and stimulate export-led growth.

As global supply chains continue to reorganize, African SEZs built on sound governance and innovation can offer a unique opportunity to position the continent as a resilient and sustainable investment destination.

Local African perspectives are now considering leveraging SEZs to advance industrialization, attract foreign investment, and drive inclusive growth through targeted incentives, infrastructure development, and export-oriented policies, as is the case in Ghana Free Zones Authority, which prioritizes fiscal incentives as the main mechanism for FDI attraction.

From a global investor lens, key factors shaping investor confidence include balancing competitiveness, sustainability, and social impact in SEZs. Improving investment climate is essential to ensure better relations with existing clients and to enhance attractivity of African SEZs.



BUSINESS OF THE FUTURE IN AFRICAN SEZs : **BALANCING HIGH-TECH LEAPFROGGING AND SUSTAINABLE TRADITIONAL MANUFACTURING**

Africa's sustainable growth trajectory increasingly relies on its ability to attract high-quality investment, diversify its economic structures, and deepen its integration into global value chains. Special Economic Zones (SEZs) stand at the centre of this agenda, acting as catalysts for industrial transformation and regional competitiveness. By concentrating world-class infrastructure, streamlined regulatory frameworks, and targeted fiscal incentives, SEZs create environments where firms can scale production, innovate, and participate more effectively in global trade.

These zones not only enhance productivity and reduce operational barriers but also facilitate skills development, technology transfer, and the emergence of new industrial clusters.

As global supply chains continue to shift in response to geopolitical realignments and the search for resilience, Africa's SEZs offer a strategic platform for repositioning the continent as a reliable and sustainable investment destination. Strengthening governance, fostering digital and green capabilities, and aligning SEZ strategies with national development priorities will be essential to maximising their contribution to long-term, inclusive, and climate-resilient growth across the continent.



INNOVATIVE FINANCING, INVESTMENT, AND PARTNERSHIPS : NEW PATHWAYS FOR SEZ DEVELOPMENT IN AFRICA



Unlocking Africa's next generation of Special Economic Zones (SEZs) requires innovative financing models, strategic investment flows, and deeper collaboration between public and private actors. Emerging trends in digital transformation, rising investor interest, and financial innovation are reshaping how SEZs operate and how they can contribute to sustainable industrial development.

Guarantee mechanisms, blended finance, and risk-sharing instruments have become essential for unlocking capital, reducing investment risk, and incentivizing green and inclusive growth within SEZ ecosystems.

At the same time, strategic partnerships—particularly those that integrate local industries into global supply chains—are proving vital for scaling infrastructure, attracting international investors, and ensuring long-term industrial resilience.

Global best practices increasingly highlight the need to align SEZ financing with sustainability frameworks so that zones not only attract responsible investment but also advance broader development goals such as skills development, technology transfer, and stronger value-chain integration.

Taken together, these insights underscore a clear pathway: capital mobilization, risk mitigation, and collaborative governance models are central to accelerating the sustainable expansion of SEZs and driving Africa's next wave of industrial transformation.



AFRICAN SEZs DIALOGUE : LEADERS' PERSPECTIVES ON SERVICES, COMPETITIVENESS AND SHARED GROWTH

Dubbed the most innovative and groundbreaking session of the year, the African SEZs Dialogue Session gathered Heads of African SEZs to provide an in-depth exploration of the opportunities and challenges shaping the future of Special Economic Zones across the continent.

Taking Place in a parliament hearing format, the session was more than a roundtable, it was an interactive and dynamic session that put to question many of the ongoing practices within African SEZs, challenging the status quo and harboring innovative ideas that can propel forward a new wave of more performant and resilient African SEZs.

Throughout The Dialogue, Speakers from Tanger Med (Morocco), Oil and Gas Free Zone Authority (Nigeria), Agence des Zones Economiques Speciales (RDC), MozParks (Mozambique), Special Economic Zones Authority (Kenya), Free Zones Authority (Ghana), Autorité de Développement et d'Administration des Zones Economiques Spéciales (Guinea), Autorité Administrative ZIS de Nkok (Gabon), and Industrial Zones Programme (South Africa), examined How SEZs can:

- Improve service delivery and competitiveness,
- Enhance investment readiness and infrastructure quality,
- Strengthen governance and institutional capacity,
- Foster innovation and sustainability,
- Expand Africa's participation in regional and global value chains.

The conversation underscored that Africa's SEZs must evolve into integrated, future-ready industrial ecosystems capable of driving inclusive growth, supporting SMEs, and enabling the ambitions of the AfCFTA.

This session reaffirmed the collective commitment of African SEZ leaders to boosting collaboration, scaling investment, and accelerating industrial transformation across the continent.



SEZs ATTRACTING INVESTMENTS FROM THE PHARMACEUTICAL SECTOR : GUIDELINES FOR AN AFRICAN MODEL



Africa remains highly dependent on pharmaceutical imports, with around 70% of countries having little or no local production, despite health being the fastest-growing SDG investment sector. This gap presents a strategic opportunity for African Special Economic Zones (SEZs) to support the development of competitive local pharmaceutical industries.

SEZs can address key feasibility constraints through a coherent policy package combining market assessment, targeted incentives, regional value-chain integration, and zone-specific infrastructure and skills development. Success depends on regulatory harmonization, strong multi-

stakeholder governance, ESG integration from the outset, and robust monitoring frameworks.

With the right policy, infrastructure, and political commitment, pharmaceutical SEZs can strengthen health security, drive industrial upgrading, and position Africa for regional and global market participation.

SEZs can attract and scale pharmaceutical investment through effective policy frameworks, regulatory standards, infrastructure, and incentives—contributing to a more competitive and resilient pharmaceutical ecosystem in Africa.

SMART & GREEN SEZs : LEVERAGING TECHNOLOGY AND RENEWABLE ENERGY TO UNLOCK SUSTAINABLE INVESTMENT OPPORTUNITIES

Africa's Special Economic Zones (SEZs) are at a critical turning point, driven by increasing regulatory constraints, growing investor pressure for sustainability, and global market shifts toward low-carbon value chains.

Instruments such as the EU Carbon Border Adjustment Mechanism (CBAM) and the rapid expansion of ESG investment markets are reshaping global competitiveness. Without decarbonization, African exports—particularly in energy-intensive sectors—risk significant losses. At the same time, Africa's network of over 230 SEZs represents a powerful platform to accelerate sustainable industrialization on scale.

The traditional SEZ model—based on low-cost land, fiscal incentives, and labor arbitrage—is no longer sufficient. Next-generation SEZs must compete on energy performance, digital connectivity, multimodal logistics, and circular economy integration. The Smart & Green SEZ model centers competitiveness on energy efficiency, decarbonization, cost mutualization through shared infrastructure, digitally driven operations, and highly efficient logistics systems.

Strategic master planning, Efficient Energy Management, Digitization, as well as mobility and high-performing logistics corridors are positioned as the core drivers of competitiveness. By adopting high-performance green buildings, on-site

renewable energy, microgrids, digital energy management systems, and low-carbon transport backbones, SEZs can achieve major cost savings, improve grid resilience, and drastically cut emissions.

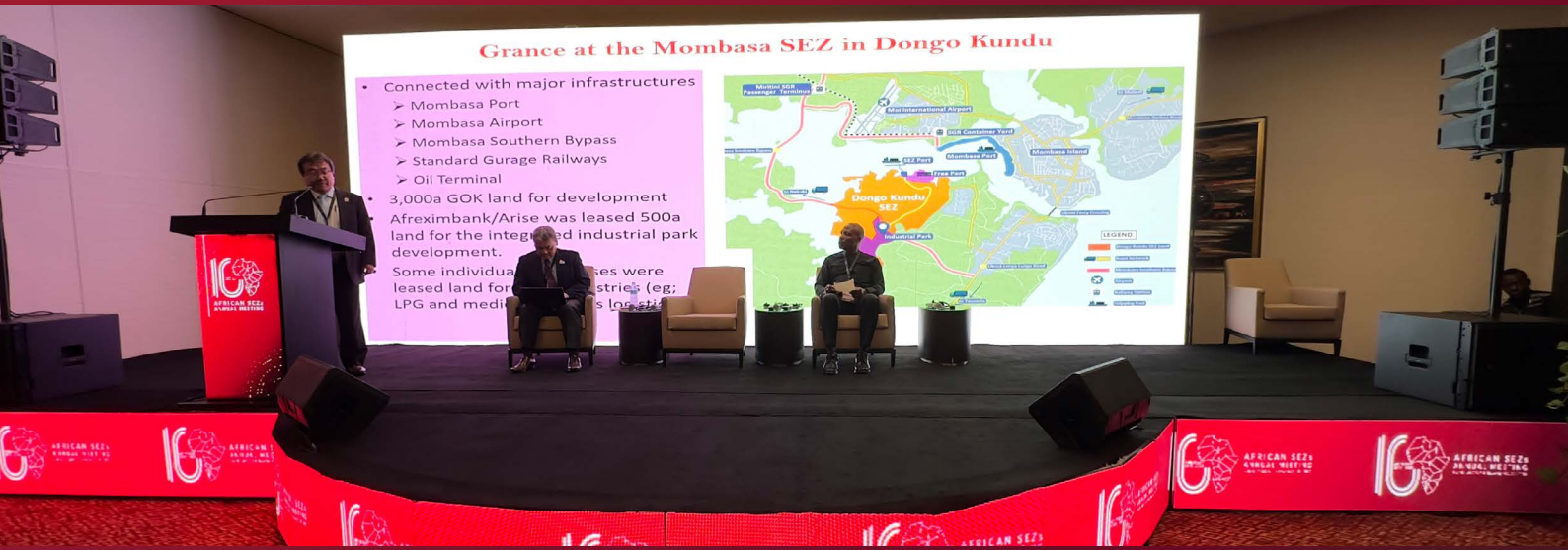
Circular industrial clusters, where zones shift from being simple landlords to active ecosystem orchestrators, are also a crucial component to the African SEZs model. By co-locating complementary industries and enabling by-product exchanges, zones can unlock hidden economic and environmental value, particularly in sectors such as agro-processing, packaging, and waste valorization.

Finally, international sustainability certifications are presented as critical tools to enhance credibility, reduce investor risk, and unlock access to green finance. Certifications across green buildings, mobility, circular economy, and smart zone management strengthen the global positioning of African SEZs in sustainable investment markets.

In summary, Smart & Green SEZs represent a strategic transformation from low-cost industrial spaces to high-performance, data-driven, low-carbon industrial ecosystems—positioning Africa as a competitive player in the future of sustainable global manufacturing.



EQUIPPING AFRICA'S WORKFORCE FOR SMART-GREEN SEZs: SKILLS AND CAPACITY FOR GLOBAL VALUE CHAIN PARTICIPATION



Skills development and institutional capacity are emerging as critical determinants of how effectively African Special Economic Zones (SEZs) can integrate into Global Value Chains.

Evidence from both Asian and African experiences shows that the most competitive SEZs are those that successfully link foreign direct investment with local industries and workforce capabilities, enabling meaningful technology transfer and sustained industrial upgrading.

Smart-Green SEZs, in particular, depend on future-ready skills—ranging from digital and technical competencies to robust vocational training systems supported by close collaboration between industry and education providers. Extending skills development initiatives to surrounding communities further enhances employability, strengthens

social inclusion, and broadens the developmental impact of SEZs.

Smart-Green SEZs function as integrated ecosystems that combine advanced digital infrastructure, renewable energy solutions, modern training institutions, and streamlined digital service platforms. These elements work together to create agile, low-carbon, and innovation-driven industrial environments.

Ultimately, Africa's ability to strengthen its global competitiveness will rely not only on infrastructure and investment flows but equally on the quality of its human capital, institutional capacity, and the depth of local linkages embedded within SEZ ecosystems.



CONCLUSION : TRANSFORMING SEZs INTO INNOVATION ECOSYSTEMS FOR THE AfCFTA



The African SEZs Annual Meeting 2025 highlighted the strategic role of Special Economic Zones (SEZs) in building resilient, connected, and sustainable economies. Beyond the traditional enclave model, SEZs are now expected to evolve into genuine innovation and transformation ecosystems, fully integrated into continental value chains. This shift aligns with the AfCFTA, which identifies 94 promising regional value chains in agribusiness, pharmaceuticals, automotive, mineral beneficiation, and digital services.

Key recommendations and strategic priorities from the meeting can be summarized as follows :

ALIGN SEZ STRATEGIES WITH THE AfCFTA :

Develop true continental production corridors and promote regional integration to strengthen African value chains.

ENHANCE GOVERNANCE AND SIMPLIFY REGULATIONS :

African SEZs are now competing directly with industrial ecosystems in Southeast Asia, Latin America, and the Middle East. Providing efficiency, transparency, and continuity will reduce investment risks and attract long-term capital.

FOSTER DIGITAL TRANSFORMATION :

SEZs should adopt advanced technologies to streamline operations, enhance productivity and attract investment.

INVEST IN HUMAN CAPITAL :

Developing skills, particularly digital capabilities and creating training programs for youth, SMEs, and local entrepreneurs will be a decisive competitive advantage for the continent.

PROMOTE INVESTMENT FACILITATION AND INVESTOR-FRIENDLY ENVIRONMENTS:

Transparent frameworks and engagement with international standards are key to boosting investor confidence.

SUPPORT SMES INTEGRATION :

Tailored programs will help small and medium-sized enterprises thrive within SEZs.

STRENGTHEN PUBLIC-PRIVATE PARTNERSHIPS:

Collaboration with private actors will improve infrastructure, ease of doing business, and overall competitiveness.

Looking forward, SEZs will continue to be key drivers of growth, innovation, and job creation. By leveraging the AfCFTA, strong governance, and targeted human capital investments, African countries can transform SEZs into catalysts for industrialization, regional integration, and shared prosperity. Engaging global partners and adopting modern trade facilitation strategies will further position Africa as a major player in global value chains, capable of generating substantial employment for its youth and accelerating economic transformation despite global uncertainties.



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REVIEW KEY MOMENTS FROM THE EVENT



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