Deepbloo

DEEPBLOO PANORAMA · PUBLIC PROCUREMENT

China and World Bank contracts

Who wins in five regions of the Global South

Africa · Asia-Pacific · Latin America · Middle East · Central Asia · 2024-2025

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INTRODUCTION

China’s share of an open market

The World Bank finances tens of thousands of public contracts every year in developing countries, and it publishes who wins each one. Its procurement rules let firms from every country bid. That makes World Bank contracts one of the few markets where Chinese companies compete in the open, under common rules, against local firms and against the rest of the world, with a public result for every contract.

This study measures what Chinese firms win in that market across the five regions of the Global South: Africa, Asia-Pacific, Latin America and the Caribbean, the Middle East and Central Asia. It rests on two primary sources. The first is the World Bank's own register of contract awards, for every contract signed in 2024 and 2025 under its investment project financing. The second is Deepbloo's collection of the World Bank's published contract award notices, which list every firm that bid, and show how often a Chinese bidder won, in the procedures collected.

Key benchmarks

- **USD 37.9 billion**: value of the 81,332 World Bank-financed contracts signed in the five regions in 2024 and 2025 (World Bank, Contract Awards in Investment Project Financing).
- **Open to all**: the World Bank "permits eligible firms and individuals from all countries" to bid on the contracts it finances. Exceptions are narrow: a borrower's own legal ban on trade with a country, United Nations sanctions, debarment (Procurement Regulations for IPF Borrowers, 7th edition, September 2025, paragraphs 3.20 and 3.22).
- **Public results**: each Contract Award Notice must name every bidder, its price as read out and as evaluated, and every rejected bidder (same Regulations, paragraph 5.94).

Sources: World Bank, Finances One dataset DS00005, data as of 18 November 2026; World Bank Procurement Regulations for IPF Borrowers, 7th edition, September 2025.

The question is not whether Chinese firms are present in World Bank procurement: they are, in 55 of the 116 borrower countries of the five regions. It is how much they win, where, which firms, in which kind of contract, and how often they prevail when they compete.

The main finding: Chinese firms win few World Bank contracts, but a large share of the biggest ones. They hold 0.55% of the contracts signed in 2024 and 2025 but 16.7% of their value, and 43.6% of the contracts worth USD 50 million or more. In Africa, they take 23.7% of the value, nine times the amount won by Indian firms, the next foreign supplier country after United Nations agencies. In the competitive procedures with a Chinese bidder found in Deepbloo's collection of World Bank award notices, a Chinese firm won about one time in two (48.8%).

Earlier research

A large Chinese share of World Bank-financed works in Africa is not new. A 2016 SAIS-CARI working paper already noted that Chinese construction firms were winning large percentages of World Bank contracts in Africa, and found that their work on projects completed between 2000 and 2013 performed similarly to that of OECD firms. A 2025 Center for Global Development working paper finds that the share of project contract value awarded to Chinese firms is not associated with better or worse World Bank project outcomes. The orders of magnitude also match official US work: the Government Accountability Office (GAO) found that businesses in China received USD 21.0 billion of international contract awards over World Bank fiscal years 2013 to 2022, about USD 2.1 billion a year and 29.2% of international contract value. The same measure in the World Bank register gives USD 2.2 to 2.8 billion a year and 30.8% for fiscal years 2020 to 2023, then USD 4.0 billion in fiscal year 2024. This study updates the picture with contracts signed in 2024 and 2025, breaks it down by region, country and group, and adds the win rate observed in the award notices collected by Deepbloo.

Sources: J. Farrell, *How do Chinese Contractors Perform in Africa? Evidence from World Bank Projects*, SAIS-CARI Working Paper 2016/3; C. Kenny, S. Duan, Z. Gehan, *Chinese Contractors and Development Project Quality*, CGD Working Paper 715, March 2025; US GAO, *World Bank: Borrower Countries' Contracts to Businesses in the U.S. and to Entities Potentially on U.S. Sanctions or Other Lists of Concern*, GAO-23-105543, May 2023.

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SECTION 01

Key figures

World Bank-financed contracts signed in 2024 and 2025 in the five regions. Win rate: award notices published from February 2024 to July 2026.

SHARE OF CONTRACT VALUE
16.7%
won by Chinese firms: USD 6.3 billion out of 37.9 billion

SHARE OF CONTRACTS
0.55%
449 contracts out of 81,332

LARGEST CONTRACTS
43.6%
of contracts worth USD 50 million or more (34 of 78)

AFRICA
23.7%
of contract value, USD 5.1 billion: 80% of all Chinese value in the five regions

WORKS
24.1%
of the value of works contracts (36.7% in Africa)

OBSERVED WIN RATE
48.8%
of the 459 competitive procedures with a Chinese bidder found in Deepbloo's collection of award notices (224 won)

Main findings

- **A few large contracts, not many small ones.** The median contract won by a Chinese firm is worth USD 6.3 million, against USD 155,000 for other foreign firms and USD 31,000 for local firms. Chinese firms hold 0.1% of contracts under USD 1 million but 25.0% of those between USD 10 and 50 million.
- **China is the first foreign supplier country by far.** Across the five regions, Chinese firms won USD 6.3 billion. Indian firms, next among supplier countries after United Nations agencies, won USD 0.7 billion. Local firms still take 60.9% of the value.
- **An African story.** Africa accounts for 80% of the value won by Chinese firms. In Tanzania, Chinese firms won 52.7% of World Bank contract value (USD 1.06 billion); in Kenya, 42.3%; in Côte d'Ivoire, 39.6%. In Latin America (1.1%) and the Middle East (0.1%), they are almost absent.
- **Four groups, 38% of the Chinese total.** CCCC (with China Road and Bridge and China Harbour), TBEA, CRCC and PowerChina won USD 2.4 billion together.
- **Chinese bidders won about half of the procedures observed.** Among the 459 competitive procedures with at least one Chinese bidder found in Deepbloo's collection of World Bank award notices, a Chinese firm won 224 (48.8%). Against at least one non-Chinese rival: 45.1%. This observed rate may not represent all World Bank-financed procedures (section 08). When Chinese bidders lost, a local firm won two times in three.
- **A share that rose, then dipped in 2025.** The Chinese share of value rose from 10.7% in 2020 to 18.2% in 2024, then fell to 14.8% in 2025, while the number of contracts won by Chinese firms reached its highest level since 2020 (232 in 2025).

Cite this study

Source: Deepbloo Panorama, *China and World Bank contracts: who wins in five regions of the Global South, 2024-2025*, November 2026 (deepbloo.com), based on World Bank contract award data.

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SECTION 02

Methodology

Two primary sources

SOURCE	WHAT IT GIVES	USED FOR
World Bank, *Contract Awards in Investment Project Financing (since FY2020)*, dataset DS00005, data as of 18 November 2026	Every contract recorded by borrowers in the World Bank's procurement system (STEP): borrower country, supplier, supplier country, signed amount in US dollars, category, method	All shares, values, countries, firms, trend (sections 03 to 07)
World Bank Contract Award Notices collected by Deepbloo, February 2024 to July 2026	For each contract: the awarded firm and every other bidder, evaluated or rejected, with its declared country	Win rate (section 08)

Scope and definitions

- **Contracts:** contracts signed between 1 January 2024 and 31 December 2025 under World Bank investment project financing, in the five regions. Budget support and contracts financed by other lenders are not covered.
- **Regions:** Africa (Sub-Saharan and North Africa); Asia-Pacific (South Asia, Southeast Asia, Mongolia and the Pacific, excluding China, Hong Kong SAR, Macao SAR, Taiwan, Japan, South Korea, Australia and New Zealand); Latin America and the Caribbean; the Middle East (Iraq, Jordan, Lebanon, West Bank and Gaza, Türkiye, Yemen); Central Asia (Kazakhstan, Kyrgyzstan, Tajikistan, Uzbekistan, Armenia, Azerbaijan, Georgia). Multi-country projects within the five regions are assigned to their region.
- **Chinese firm:** a supplier whose country, as recorded by the World Bank, is China. The World Bank records the *place of registration*. Firms registered in Hong Kong SAR, Macao SAR or Taiwan are not counted as Chinese.
- **Local firm:** a supplier registered in the borrower country (for a multi-country project, in the same region). **Other foreign firm:** all others, including United Nations agencies.
- **Counting rules:** a contract counts once. A contract held by a joint venture with a Chinese member counts as a Chinese contract. For values, the World Bank splits a joint venture's contract value equally among its members; this study keeps that split.
- **Values** are signed contract amounts in US dollars as recorded by the World Bank. They measure contracts awarded, not money disbursed, and include neither subcontracts nor cofinancing.

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Win rate

Deepbloo collected 523 World Bank award notices for projects outside China that list at least one bidder declared as Chinese. A notice republished for the same contract counts once (3 republications); 518 notices concern the five regions. A procedure is **competitive** when the notice lists at least one other bid, evaluated or rejected. The win rate is the share of competitive procedures with a Chinese bidder that a Chinese firm won. Intervals are 95% Wilson confidence intervals.

Controls

- **Accuracy of the classification, measured.** 60 competitive procedures were drawn at random (30 classified as Chinese wins, 30 as losses) and re-read blind by an independent reviewer from the notice text. Agreement: 60 out of 60 on the winner, on the presence of a Chinese bidder and on the presence of other bidders. Measured accuracy: 100%, 95% confidence interval 94.0% to 100%.
- **Cross-check with the World Bank register.** 467 of the 523 notices (89.3%) were matched to a contract in the World Bank register by project and reference. Where the notice says a Chinese firm won, the register shows a Chinese supplier in 250 of 254 cases.
- **Largest contracts.** The ten largest contracts won by Chinese firms (USD 1.46 billion, 23.2% of the Chinese total) were checked one by one: all are distinct contracts (separate lots where a tender was split) awarded to firms registered in China, and for seven of them the signed price in the published award notice matches the World Bank register, allowing for exchange rates. No duplicate record was found among the 78 contracts of USD 50 million or more.
- **Parent groups** (section 06) were checked against annual reports, stock exchange filings or official group websites. Spelling variants of the same company were merged.

What these figures measure, and what they miss

The supplier country is where the firm is registered. Some Chinese companies bid through branches or subsidiaries registered in the borrower country or in Hong Kong SAR: they are not counted as Chinese here. Adding the firms whose name identifies a Chinese company (66 contracts, USD 391 million) would raise the Chinese share of value from 16.7% to 17.7%, and from 23.7% to 25.5% in Africa. This is an estimate based on company names, not a full identification of beneficial owners. The register is also entered by borrowers and contains some errors. Among the 78 contracts of USD 50 million or more, two are clearly misrecorded, most likely in local currency: two million fish fingerlings in Burkina Faso entered at USD 474.6 million, and the upgrading of two schools in Pakistan at USD 130.6 million. Neither involves a Chinese firm, and both are kept as published. Excluding them would raise the Chinese share of value to 17.0%, and of contracts of USD 50 million or more to 44.7%. The figures in this report are therefore a floor. Figures for 2025 may still move slightly as borrowers record late contracts.

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SECTION 03

Trend, 2020-2025

Over six years, the share of World Bank contract value won by Chinese firms in the five regions rose from 10.7% in 2020 to 18.2% in 2024, its highest level, before falling back to 14.8% in 2025. Africa shows a broadly similar rise, at a higher level: 16.7% in 2020, 25.1% in 2024, 22.0% in 2025.

Share of World Bank contract value won by Chinese firms, by year of signature

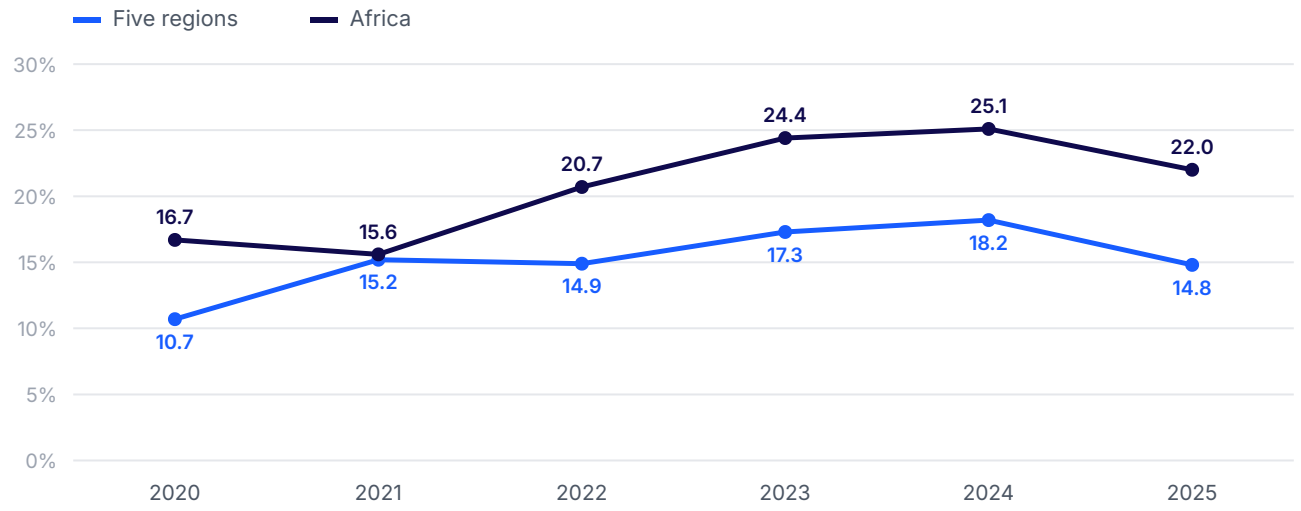

Figure 1. Contracts signed in calendar years 2020 to 2025, five regions. Source: World Bank DS00005, data as of 18 November 2026; Deepbloo calculations.

YEAR	ALL CONTRACTS, USD BN	WON BY CHINESE FIRMS, USD BN	CHINESE SHARE	CHINESE SHARE, AFRICA	CONTRACTS WON BY CHINESE FIRMS
2020	15.4	1.64	10.7%	16.7%	200
2021	18.6	2.82	15.2%	15.6%	137
2022	15.7	2.35	14.9%	20.7%	125
2023	18.3	3.17	17.3%	24.4%	201
2024	20.8	3.79	18.2%	25.1%	217
2025	17.1	2.53	14.8%	22.0%	232

What the 2025 dip measures

The share is a share of value. A few contracts worth more than USD 50 million can move it by several points in a year. In 2025, Chinese firms won more World Bank contracts than in any year since 2020 (232, against 217 in 2024), but for a lower total value (USD 2.5 billion against 3.8 billion), while the value of all contracts signed also fell (USD 17.1 billion against 20.8 billion). One year does not make a reversal.

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SECTION 04

The five regions

Local firms win the largest share of World Bank contract value in every region: 60.9% across the five regions, from 45.1% in Central Asia to 91.4% in the Middle East. China is the first foreign supplier country in Africa and Asia-Pacific; Chinese firms are nearly absent from Latin America and the Middle East.

Who wins World Bank contract value, by region (2024-2025)

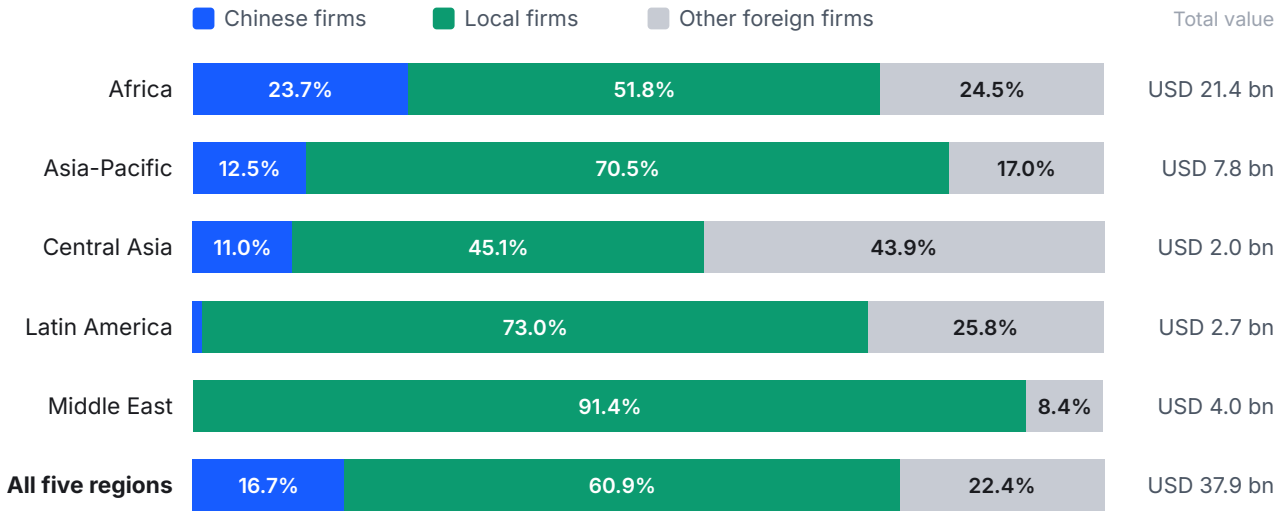

Figure 2. Share of the value of contracts signed in 2024 and 2025, by country of registration of the supplier. Joint-venture values split equally among members. Source: World Bank DS00005; Deepbloo calculations.

REGION	CONTRACTS	WON BY CHINESE FIRMS	SHARE OF CONTRACTS	VALUE, USD BN	CHINESE VALUE, USD BN	SHARE OF VALUE
Africa	42,750	292	0.68%	21.4	5.08	23.7%
Asia-Pacific	20,956	79	0.38%	7.8	0.98	12.5%
Central Asia	3,812	65	1.71%	2.0	0.22	11.0%
Latin America and Caribbean	10,576	9	0.09%	2.7	0.03	1.1%
Middle East	3,238	4	0.12%	4.0	0.01	0.1%
All five regions	**81,332**	**449**	**0.55%**	**37.9**	**6.32**	**16.7%**

- **Africa** concentrates USD 21.4 billion of contracts, 57% of the five-region total, and 292 of the 449 contracts won by Chinese firms. Chinese firms take 23.7% of the value there, almost as much as all other foreign firms together (24.5%).
- **Asia-Pacific:** 12.5% of the value, led by Pakistan, Nepal, Bangladesh and Mongolia. **Central Asia:** 11.0%, with 49 contracts in Uzbekistan alone.
- **Latin America and the Middle East:** 9 and 4 contracts won by Chinese firms over two years. The first foreign supplier countries there are Spain (USD 200 million) and Türkiye (USD 84 million).

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First foreign supplier countries

SUPPLIER COUNTRY	VALUE WON IN THE FIVE REGIONS, 2024-2025, USD MILLION	NOTE
China	6,316	
United Nations agencies	1,671	United Nations agencies (UNOPS, UNICEF, WFP...)
India	721	
Austria	535	One contract: Voith Hydro, Tajikistan, USD 526 million
France	421	
Spain	417	
Türkiye	295	
Italy	238	

Firms registered outside the borrower country only. United Nations agencies are recorded by the World Bank under the supplier country "World". Source: World Bank DS00005; Deepbloo calculations.

Share of World Bank contract value won by Chinese firms, by borrower country (2024-2025)

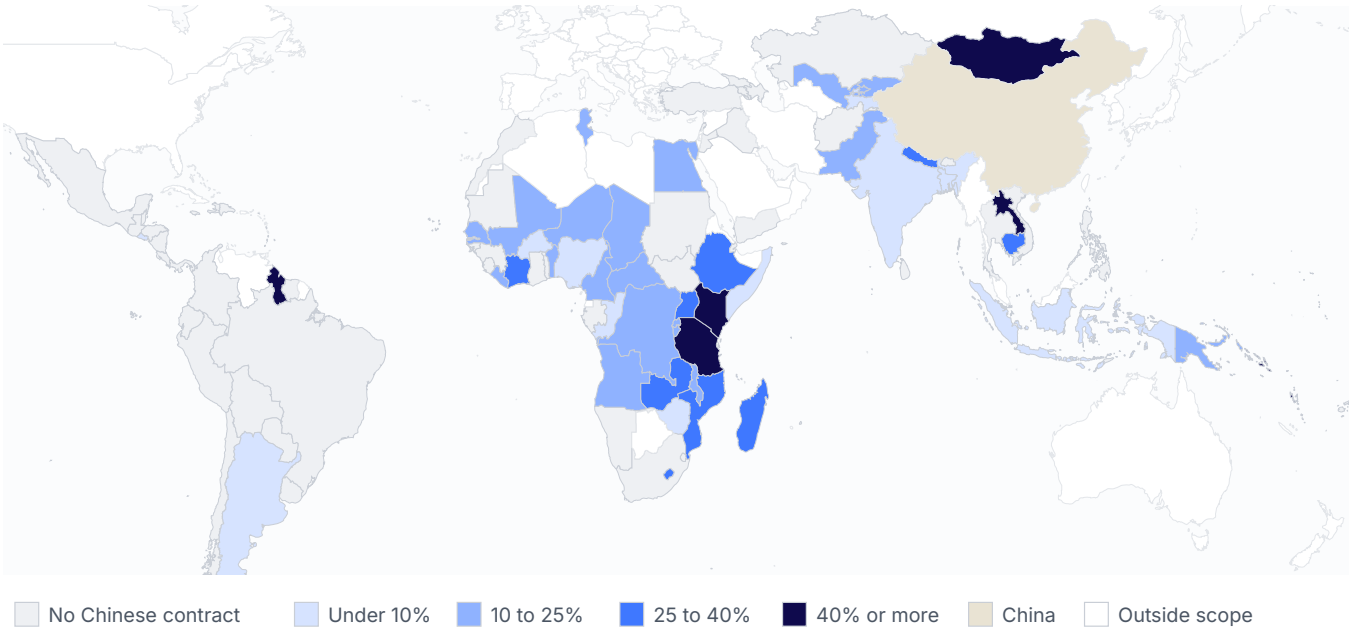

Figure 3. Single-country contracts signed in 2024 and 2025. Multi-country regional projects are not mapped (USD 859 million won by Chinese firms, of which USD 484 million on the Addis Ababa-Djibouti road corridor). Small island states may not be visible. Source: World Bank DS00005; Deepbloo calculations. Map: Natural Earth via world-atlas.

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SECTION 05

Countries

Chinese firms won at least one World Bank-financed contract in 55 of the 116 borrower countries of the five regions in 2024 and 2025. Tanzania stands out: USD 1.06 billion won by Chinese firms, 52.7% of all World Bank contract value in the country and 16.8% of everything Chinese firms won in the five regions.

Value won by Chinese firms, top 15 borrower countries (2024-2025)

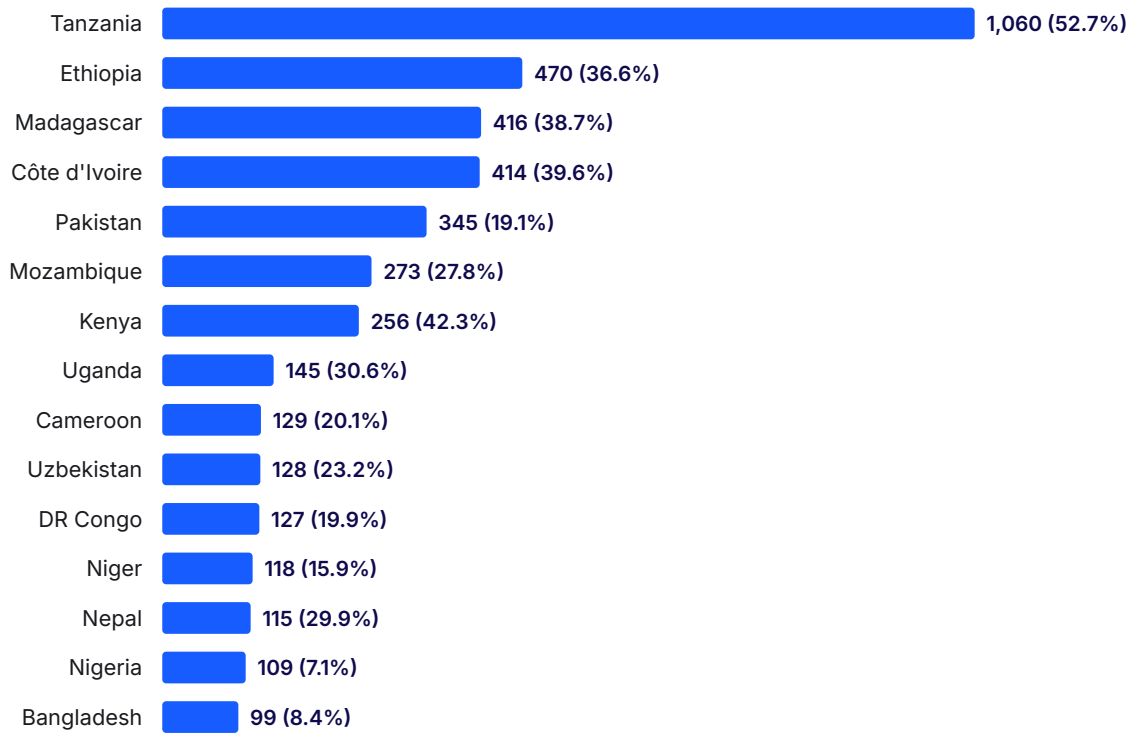

Figure 4. USD million won by Chinese firms; in brackets, share of all World Bank contract value signed in the country. Source: World Bank DS00005; Deepbloo calculations.

Among countries with at least USD 100 million of World Bank contracts over the two years, the Chinese share is highest in Mongolia (64.7%), the Solomon Islands (57.0%), Tanzania (52.7%), Laos (44.9%) and Kenya (42.3%). In Vanuatu, with a smaller total (USD 79 million), it reaches 83.4%. In Nigeria, the second-largest World Bank market in Africa after Tanzania (USD 1.5 billion of contracts), it is 7.1%. The full list is in Annex A.

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SECTION 06

Which Chinese firms win

The 449 contracts won by Chinese firms in 2024 and 2025 were awarded to 312 distinct supplier names. Once spelling variants are merged and subsidiaries grouped under their parent, they belong to 200 groups or independent companies. The market is concentrated: the first four groups won USD 2.4 billion, 38.4% of the Chinese total.

Value won by Chinese groups, five regions (2024-2025)

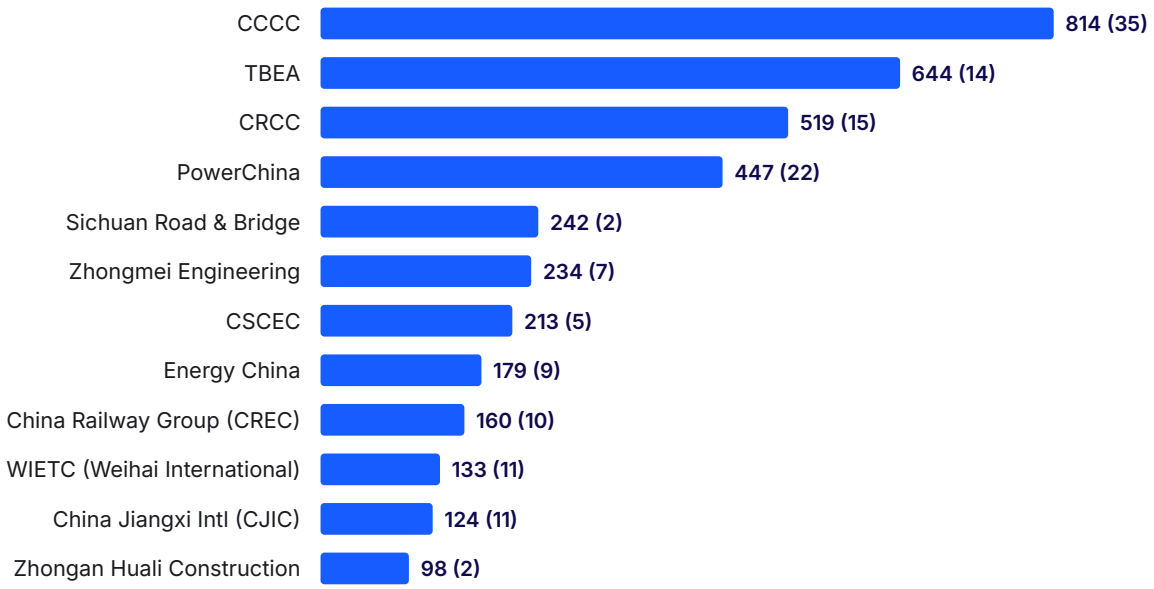

Figure 5. USD million; in brackets, number of contracts. Subsidiaries grouped under their parent (see note below and Annex B). Source: World Bank DS00005; group annual reports; Deepbloo calculations.

GROUP	CONTRACTS	USD MILLION	SHARE OF CHINESE VALUE	MAIN COUNTRIES, BY VALUE
CCCC	35	814	12.9%	Côte d'Ivoire, Tanzania, Ethiopia
TBEA	14	644	10.2%	Tanzania, West and Central Africa (regional), Pakistan
CRCC	15	519	8.2%	Ethiopia (Addis-Djibouti corridor), Madagascar, Vanuatu
PowerChina	22	447	7.1%	Côte d'Ivoire, Cameroon, Malawi
Sichuan Road & Bridge	2	242	3.8%	Ethiopia (Addis-Djibouti corridor)
Zhongmei Engineering	7	234	3.7%	Uganda, West and Central Africa (regional), Mozambique
CSCEC	5	213	3.4%	Madagascar, Pakistan
Energy China	9	179	2.8%	Côte d'Ivoire, Pakistan, Ethiopia
China Railway Group (CREC)	10	160	2.5%	Tanzania, Bangladesh, Zambia
WIETC (Weihai International)	11	133	2.1%	DR Congo, Mozambique, Madagascar
China Jiangxi Intl (CJIC)	11	124	2.0%	Madagascar, Laos, Cambodia
Zhongan Huali Construction	2	98	1.6%	Tanzania

Groups: CCCC includes China Road and Bridge (CRBC), China Harbour Engineering (CHEC) and CCCC First Highway Engineering (CFHEC). PowerChina includes Sinohydro, Sinohydro Bureau 14, STECOL and PowerChina Jiangxi Electric Power Construction. CRCC includes China Civil Engineering Construction (CCECC) and the 15th and 18th Bureaus. China Railway Group (CREC) includes China Railway Construction Engineering Group, its East African arm CRJE (East Africa), China Railway Seventh Group and the No.2, No.4 and No.10 companies. WIETC (Weihai International Economic & Technical Cooperative) and CJIC include the joint ventures they lead. CSCEC includes its Third and Eighth bureaus; Energy China includes Gezhouba and its design and construction institutes; TBEA includes TBEA International Engineering, TBEA Sunoasis and TBEA Deyang Cable; SINOMACH includes SUMEC. Each link was checked in the parent's annual report, stock exchange filings or official website. The owner of Zhongan Huali Construction could not be identified, and one award notice gives it a Hong Kong address; it is listed on its own, as recorded by the World Bank (China).

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SECTION 07

What Chinese firms win

Works, and large contracts

Chinese firms win almost only works and goods. They take 24.1% of the value of works contracts (USD 23.3 billion in the five regions) and 8.4% of goods (USD 8.1 billion), but 0.2% of consulting services and almost none of non-consulting services (one contract).

Share of contracts won by Chinese firms, by contract size (2024-2025)

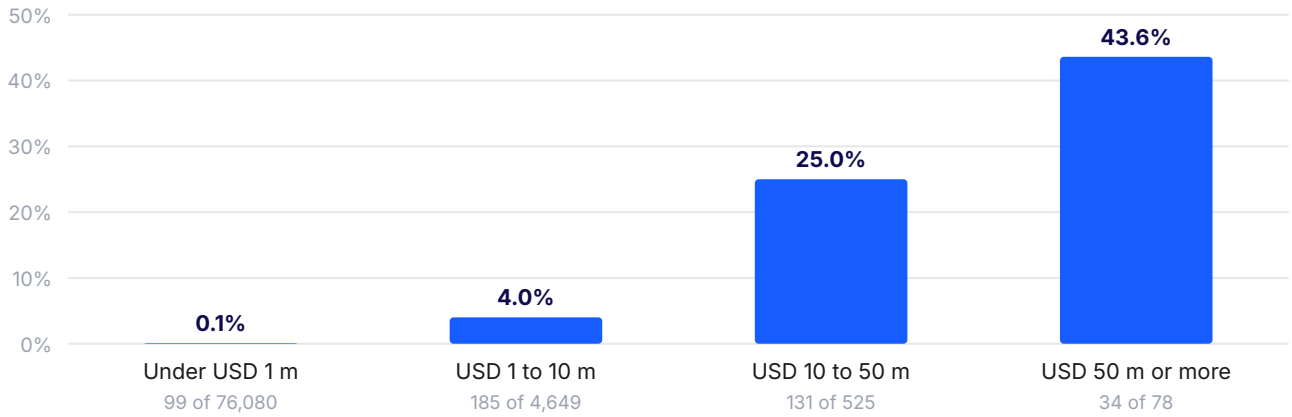

Figure 6. Share of the number of contracts in each size band. Under the bars: contracts won by Chinese firms out of all contracts in the band. Source: World Bank DS00005; Deepbloo calculations.

The larger the contract, the higher the Chinese share: 0.1% of contracts under USD 1 million, 4.0% between USD 1 and 10 million, 25.0% between USD 10 and 50 million and 43.6% of contracts of USD 50 million or more. Of the 603 contracts worth USD 10 million or more, Chinese firms won 165 (27.4%).

Procurement methods

METHOD	CONTRACTS	VALUE, USD BN	WON BY CHINESE FIRMS, USD BN	CHINESE SHARE
Request for Bids	15,426	24.47	4.91	20.1%
Direct Selection	8,546	5.51	0.39	7.2%
Request for Proposals	128	2.41	1.01	42.0%
Quality And Cost-Based Selection	2,326	2.12	0.00	0.2%
Request for Quotations	32,408	1.89	0.00	0.1%

Five methods with the highest value, 2024-2025. Source: World Bank DS00005; Deepbloo calculations.

77.7% of the value won by Chinese firms comes from Requests for Bids, the World Bank's standard competitive method for works and goods, and 16.0% from Requests for Proposals, used for complex contracts such as design and build, where Chinese firms take 42.0% of the value. Direct selection, without competition, accounts for 6.2% of the Chinese total.

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SECTION 08

How often Chinese bidders won, in the procedures observed

The World Bank register names the winner of each contract, not the losers. The award notices do: they list every bid, the evaluated price and the rejected bidders. Deepbloo read these notices to identify every procedure where at least one bidder declared China as its country, and who won it.

COMPETITIVE PROCEDURES
459
with at least one Chinese bidder and at least one other bid

WON BY A CHINESE FIRM
48.8%
224 of 459; 95% confidence interval 44.3% to 53.4%

AGAINST A NON-CHINESE RIVAL
45.1%
192 of 426 procedures with at least one non-Chinese bidder (40.4% to 49.8%)

REGION	COMPETITIVE PROCEDURES WITH A CHINESE BIDDER	WON BY A CHINESE FIRM	WIN RATE
Africa	294	146	49.7%
Asia-Pacific	76	42	55.3%
Central Asia	83	34	41.0%
Latin America	3	1	1 of 3
Middle East	3	1	1 of 3
All five regions	**459**	**224**	**48.8%**

Source: World Bank Contract Award Notices collected by Deepbloo, published from February 2024 to July 2026. Below 30 procedures, numbers are given instead of a rate. In addition, Chinese firms won 59 contracts where the notice lists no other bid (single bid or direct selection).

What this rate covers

The rate is observed on the award notices in Deepbloo's collection, not on every World Bank procedure. The collection holds the award notice of roughly half of the 505 contracts won by Chinese firms in the World Bank register between March 2024 and June 2026: between 233 and 275 (46% to 54%), depending on how lots signed on different dates under one reference are counted, with similar coverage for contracts under and over USD 10 million. The collection held fewer notices per month from December 2025 to May 2026. The rate was 50.5% for notices published from February 2024 to November 2025 (161 of 319) and 45.0% from December 2025 to July 2026 (63 of 140); the two confidence intervals overlap. The confidence intervals reflect sampling variation only, not gaps in the collection. This observed rate may therefore not represent all World Bank-financed competitive procedures.

When Chinese bidders lost, who won?

In the 235 competitive procedures where Chinese bidders lost, the contract went to a local firm, alone or in a joint venture, in 155 cases (66%), and to a firm from another foreign country in 80 cases (34%). Indian firms were the most frequent foreign winners (16 procedures), followed by Turkish firms (8).

Why the win rate and the share of contracts differ

Chinese firms won about half of the procedures observed, but hold only 0.55% of all contracts, because they enter few: mostly large works and equipment contracts. Most World Bank contracts are small consulting, goods and quotation contracts, where Chinese bidders are rare: of the 51,005 World Bank award notices Deepbloo collected, 523 (1%) list a Chinese bidder.

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SECTION 09

Who may bid, and what registration hides

Eligibility differs from one lender to another

LENDER	WHO MAY BID ON THE CONTRACTS IT FINANCES	CHINA	SOURCE
World Bank	Firms from all countries, with narrow exceptions	Eligible	Procurement Regulations for IPF Borrowers, 2025, para. 3.20 to 3.22
African Development Bank	Nationals of member countries; the African Development Fund now allows procurement from any country	Non-regional member, eligible	afdb.org, Resources for businesses; CIA World Factbook, AfDB entry
Asian Development Bank	Firms from member countries	Member since 1986, eligible	ADB Procurement Policy; adb.org
Islamic Development Bank	Bidders from member countries; bidders from non-member countries are not eligible for goods and works unless the financing agreement allows it	Not a member; not eligible unless the financing agreement allows it	isdb.org, Project Procurement

This study covers the World Bank only. Its rules let firms from all countries bid, with narrow exceptions, and it publishes as open data a register of every contract, with the supplier's country, updated daily.

Chinese firms declared under another flag

The country recorded for a supplier is its place of registration. Award notices show that several Chinese companies bid under another country:

- China Road and Bridge Corporation, declared in Madagascar, won a contract in Madagascar; its beneficial owner is listed as a Chinese national.
- Jiangxi Geo-Engineering, declared in Tanzania, won a contract in Tanzania; the notice gives the People's Republic of China as its beneficial owner's country.
- China Jiangxi International (CJIC), declared in Benin, won two contracts in Benin.
- In the Democratic Republic of Congo, all the Chinese contractors on one procedure were declared in "Hong Kong SAR, China", including the winners, CJIC and Guizhou Highway, whose listed beneficial owners are Chinese provincial state-asset commissions.

In the World Bank register, 66 contracts worth USD 391 million in 2024 and 2025 went to firms registered outside mainland China whose names identify a Chinese company (China Road and Bridge in Madagascar, Mozambique, Rwanda, Tanzania and Togo; Sinohydro in Hong Kong SAR; STECOL and Jiangxi Geo-Engineering in Tanzania; Zhongmei Engineering in Madagascar and Zambia, among others). Their value is not counted as Chinese in this report. Local companies owned by Chinese groups under a local name cannot be identified this way.

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SECTION 10

Takeaways

- **One contract in 180, one dollar in six.** Chinese firms won 0.55% of World Bank-financed contracts in the five regions in 2024 and 2025, and 16.7% of their value (17.7% on a name-based estimate that adds Chinese firms registered elsewhere).
- **The large-works market.** 43.6% of contracts of USD 50 million or more, 24.1% of works value, 36.7% of works value in Africa.
- **Africa first.** 80% of the Chinese value is in Africa, where Chinese firms win almost as much as all other foreign firms together. Tanzania alone accounts for 16.8% of all Chinese value.
- **A competitive edge, not a monopoly.** Chinese bidders won 48.8% of the competitive procedures observed in Deepbloo's collection of award notices. Local firms won two thirds of the rest.
- **Concentration.** Four groups, CCCC, TBEA, CRCC and PowerChina, account for 38.4% of the Chinese total.

CONCLUSION

A narrow market, firmly held

In World Bank procurement, where rules are common and results are public, Chinese firms do not compete across the board. They are almost absent from consulting and from the contracts under USD 1 million, which make up 93.5% of World Bank contracts by number. But in the market they target, large works and equipment contracts, mostly in Africa, they won about half of the procedures observed in the award notices collected by Deepbloo and hold about a quarter of works value.

Two limits shape these figures. They describe World Bank financing only, not projects financed by other lenders, including Chinese policy banks, which follow their own procurement rules. And because the World Bank records where a firm is registered, not who owns it, the Chinese share is a floor.

Indicators to watch: whether the Chinese share of value returns towards its 2024 level (18.2%) in 2026 contracts; the share of contracts of USD 50 million or more; the win rate in Central Asia, where Turkish firms won 7 of the procedures lost by Chinese bidders; and the number of Chinese companies bidding through locally registered subsidiaries.

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SECTION 11

Annexes

A. Countries with contracts won by Chinese firms, 2024-2025

COUNTRY	REGION	CONTRACTS WON BY CHINESE FIRMS	CHINESE VALUE, USD M	ALL CONTRACTS, USD M	CHINESE SHARE OF VALUE
Tanzania	Africa	47	1,060.1	2,011	52.7%
Ethiopia	Africa	34	469.7	1,283	36.6%
Madagascar	Africa	30	416.0	1,076	38.7%
Côte d'Ivoire	Africa	8	414.2	1,045	39.6%
Pakistan	Asia-Pacific	17	344.8	1,807	19.1%
Mozambique	Africa	16	273.1	981	27.8%
Kenya	Africa	15	256.4	606	42.3%
Uganda	Africa	8	145.2	475	30.6%
Cameroon	Africa	3	128.7	639	20.1%
Uzbekistan	Central Asia	49	128.0	552	23.2%
DR Congo	Africa	10	126.6	635	19.9%
Niger	Africa	5	118.0	740	15.9%
Nepal	Asia-Pacific	5	115.2	385	29.9%
Nigeria	Africa	8	108.9	1,523	7.1%
Bangladesh	Asia-Pacific	5	99.2	1,185	8.4%
Mongolia	Asia-Pacific	8	99.2	153	64.7%
Laos	Asia-Pacific	12	81.0	180	44.9%
Rwanda	Africa	12	80.4	482	16.7%
Cambodia	Asia-Pacific	7	69.2	256	27.0%
Vanuatu	Asia-Pacific	2	66.0	79	83.4%
Mali	Africa	3	63.6	257	24.7%
Malawi	Africa	1	62.5	396	15.8%
Solomon Islands	Asia-Pacific	9	62.2	109	57.0%
Chad	Africa	9	61.3	409	15.0%
Burundi	Africa	5	52.1	232	22.4%
Kyrgyzstan	Central Asia	6	51.4	209	24.5%
Angola	Africa	9	48.5	281	17.3%
Zambia	Africa	8	46.1	140	32.9%
Tunisia	Africa	1	45.8	407	11.3%
Senegal	Africa	2	44.7	417	10.7%
Lesotho	Africa	2	43.9	127	34.7%
Comoros	Africa	4	43.7	161	27.2%
Central African Republic	Africa	5	34.9	211	16.6%
Tajikistan	Central Asia	7	31.5	809	3.9%
Egypt	Africa	1	23.3	230	10.1%
Benin	Africa	2	22.0	128	17.3%
Papua New Guinea	Asia-Pacific	3	17.5	93	18.7%
Guyana	Latin America	2	16.4	38	43.2%
Liberia	Africa	6	16.0	132	12.1%
Sint Maarten	Latin America	3	12.7	43	29.6%
India	Asia-Pacific	2	11.1	1,261	0.9%

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COUNTRY	REGION	CONTRACTS WON BY CHINESE FIRMS	CHINESE VALUE, USD M	ALL CONTRACTS, USD M	CHINESE SHARE OF VALUE
Cabo Verde	Africa	1	10.4	118	8.8%
Burkina Faso	Africa	5	9.4	913	1.0%
Indonesia	Asia-Pacific	5	8.4	709	1.2%
West Bank and Gaza	Middle East	4	5.8	114	5.1%
Marshall Islands	Asia-Pacific	2	3.2	105	3.0%
Somalia	Africa	2	3.1	352	0.9%
Gambia	Africa	1	1.3	98	1.4%
São Tomé and Príncipe	Africa	1	1.2	49	2.5%
Argentina	Latin America	2	1.0	187	0.5%
Zimbabwe	Africa	1	0.9	13	6.8%
Republic of Congo	Africa	1	0.7	103	0.7%
El Salvador	Latin America	1	0.5	386	0.1%
Maldives	Asia-Pacific	1	0.2	21	0.9%
Samoa	Asia-Pacific	1	0.1	22	0.3%

Single-country contracts. Regional multi-country projects: USD 859 million won by Chinese firms. Source: World Bank DS00005, data as of 18 November 2026.

B. Parent groups: sources

GROUP	COMPANIES IN THE WORLD BANK DATA	SOURCE OF THE OWNERSHIP LINK
CCCC	China Communications Construction; China Road and Bridge (CRBC); China Harbour Engineering (CHEC); CCCC First Highway Engineering (CFHEC)	CCCC annual report 2022, list of subsidiaries (HKEX)
PowerChina	Sinohydro; Sinohydro Bureau 14; STECOL (PowerChina Municipal Construction Group); PowerChina Jiangxi Electric Power Construction	PowerChina audited accounts 2024 (CNINFO)
CRCC	China Civil Engineering Construction (CCECC); China Railway 15th Bureau; China Railway 18th Bureau	CRCC annual report 2023, main subsidiaries (HKEX)
China Railway Group (CREC)	China Railway Construction Engineering Group (CRCEG); CRJE (East Africa); China Railway Seventh Group; China Railway No.2, No.4, No.10	CREC annual report 2023 (HKEX); CRJE: Daily News (Tanzania) and Beijing Review name it China Railway Construction Engineering (East Africa)
CSCEC	China Construction Third Engineering Bureau (CCTEB); China Construction Eighth Engineering Division (CCEED)	CSCEC organisational structure (english.cscec.com)
Energy China	China Gezhouba Group; Northwest Electric Power Design Institute (NWEPDI); Hunan Electric Power Design Institute; Jiangsu No.1 and Shanxi Electric Power Construction	Energy China annual report 2025 and 2024 filing (HKEX)
TBEA	TBEA Co.; TBEA International Engineering; TBEA Sunoasis; TBEA Deyang Cable	TBEA annual report 2025
SINOMACH	SUMEC Complete Equipment & Engineering	SUMEC annual report (CNINFO); SINOMACH controls SUMEC

C. Data notes

- World Bank country codes that are not ISO codes were mapped: ZR to DR Congo, TP to Timor-Leste, RY to Yemen; Côte d'Ivoire and Somalia were mapped by name. Regional codes were assigned to their region.
- Award notices: a few notices declare a country that contradicts the firm's address (for example a Hong Kong address declared as China). The declared country was kept, as published.
- Deepbloo's collection of World Bank award notices held fewer notices per month from December 2025 to May 2026. This affects the number of procedures behind the win rate, not the shares and values, which come from the World Bank register.
- One contract explains Austria's place among foreign supplier countries: Voith Hydro, electromechanical equipment in Tajikistan, USD 526 million.

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ABOUT

What is Deepbloo?

Deepbloo detects public and private projects early, from the first signals to the contract award, in France and in more than 190 countries.

Before a tender is published, a project leaves traces: a council decision, a building permit, an environmental notice, a lender's project document, a procurement plan. Deepbloo collects these signals so that a project, such as a new water treatment plant financed by a development bank, can be followed from its approval to its tender and then to its award.

Early detection

Upcoming public and private projects, council decisions, building permits and environmental notices, months before the formal tender.

Tenders and awards

Tenders and award notices from more than 5,000 sources, including national portals and multilateral lenders.

Precise search

Keywords, sectors, countries, buyers, budgets and deadlines combined in one search.

Faster reading

Artificial intelligence extracts the key criteria of each notice and summarises long tender documents.

INTERNATIONAL
4,000,000+
tenders in 190+ countries

SOURCES
5,000+
national portals, lenders, buyers

FRANCE
1,500,000+
council decisions

This study was prepared by Deepbloo's data team from public World Bank data. An AI-assisted reviewer re-read a random sample of award notices blind; figures were cross-checked against the World Bank register.

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