

Jumping into the Sea: Chinese Migrants' Engagement in Non- Traditional Agricultural Commodities in Ethiopia

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This Working Paper series emerges from the China and Brazil in African Agriculture (CBAA) programme of the Future Agricultures Consortium. This is supported by the UK Economic and Social Research Council's 'Rising Powers and Interdependent Futures' programme (www.risingpowers.net). We expect 24 papers to be published during 2015, each linked to short videos presented by the lead authors.

The CBAA team is based in Brazil (University of Brasilia, Gertulio Vargas Foundation, and Universidade Federal do ABC), China (China Agricultural University, Beijing), Ethiopia (Ethiopian Agricultural Research Institute, Addis Ababa), Ghana (University of Ghana at Legon), Mozambique (Instituto de Estudos Sociais e Económicos, Maputo), Zimbabwe (Research and Development Trust, Harare), the UK (the Institute of Development Studies, the International Institute for Environment and Development and the Overseas Development Institute).

The team includes 25 researchers coming from a range of disciplines including development studies, economics, international relations, political science, social anthropology and sociology, but all with a commitment to cross-disciplinary working. Most papers are thus the result of collaborative research, involving people from different countries and from different backgrounds. The papers are the preliminary results of this dialogue, debate, sharing and learning.

As Working Papers they are not final products, but each has been discussed in project workshops and reviewed by other team members. At this stage, we are keen to share the results so far in order to gain feedback, and also because there is massive interest in the role of Brazil and China in Africa. Much of the commentary on such engagements are inaccurate and misleading, or presented in broad-brush generalities. Our project aimed to get behind these simplistic representations and find out what was really happening on the ground, and how this is being shaped by wider political and policy processes.

The papers fall broadly into two groups, with many overlaps. The first is a set of papers looking at the political economy context in Brazil and China. We argue that historical experiences in agriculture and poverty programmes, combine with domestic political economy dynamics, involving different political, commercial and diplomatic interests, to shape development cooperation engagements in Africa. How such narratives of agriculture and development – about for example food security, appropriate technology, policy models and so on - travel to and from Africa is important in our analysis.

The second, larger set of papers focuses on case studies of development cooperation. They take a broadly-defined 'ethnographic' stance, looking at how such engagements unfold in detail, while setting this in an understanding of the wider political economy in the particular African settings. There are, for example, major contrasts between how Brazilian and Chinese engagements unfold in Ethiopia, Ghana, Mozambique and Zimbabwe, dependant on historical experiences with economic reform, agricultural sector restructuring, aid commitments, as well as national political priorities and stances. These contrasts come out strikingly when reading across the papers.

The cases also highlight the diversity of engagements grouped under 'development cooperation' in agriculture. Some focus on state-facilitated commercial investments; others are more akin to 'aid projects', but often with a business element; some focus on building platforms for developing capacity through a range of training centres and programmes; while others are 'below-the-radar' investments in agriculture by diaspora networks in Africa. The blurring of boundaries is a common theme, as is the complex relationships between state and business interests in new configurations.

This Working Paper series is one step in our research effort and collective analysis. Work is continuing, deepening and extending the cases, but also drawing out comparative and synthetic insights from the rich material presented in this series.

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Introduction

This paper explores the nature and extent of Chinese migrants' involvement in the demand and supply of non-traditional agricultural commodities in Ethiopia, shares the perspectives of the different actors involved, and discusses the implications of this presence for Ethiopian development. The focus here is not simply on the food and agriculture sector; the study also aims to shed light on the Chinese migrants involved in that sector. For instance, who are they and where do they come from in China? Why do they come to Ethiopia, and how do they end up in the food and agriculture sector? How do their business networks operate? What are their aspirations, and do they see Ethiopia as a permanent home?

Currently Chinese engagement in the food and agriculture sector in Ethiopia is occurring at multiple levels. At the level of official cooperation between the two states, there is a China-Ethiopia Agricultural Technology Demonstration Centre (ATDC) in Ginchi; Chinese instructors are teaching at agricultural vocational colleges; Chinese agronomists are participating in UN and other agricultural development projects; and Chinese experts are serving with the Ministry of Agriculture (Alemu 2013). However, Chinese engagement in the food and agriculture sector in Ethiopia and in other African countries is by no means confined to the level of official cooperation. Chinese entrepreneurs are also investing in farms and food sector businesses. Meanwhile, the presence of large numbers of Chinese migrants has spurred demand for non-traditional agricultural commodities such as pork, tofu and Chinese vegetables, with Chinese entrepreneurs engaged in the sale and in some cases also in the production of these commodities. Non-traditional agricultural commodities are defined here as those food commodities which are not a part of the traditional Ethiopian diet. Examples include pork, tofu, sesame and certain types of vegetables such as bok choy, chives and Chinese cabbage (see Annex 1). This study focuses on non-traditional commodities because Chinese migrants prefer them to traditional Ethiopian foods, and this niche market has grown in tandem with the Chinese presence in the country.

This is a story which is unfolding largely below the radar of official cooperation, based on exchanges between Ethiopian producers and merchants on the one hand with Chinese consumers and entrepreneurs on the other. Neither the Ethiopian nor the Chinese governments appear to be significantly involved in promoting this trade. Rather than being a state orchestrated phenomenon, it has arisen organically in tandem with the growing Chinese presence in the country. Thus this study provides insights into China-Africa relations that have emerged not from state sponsored programmes, but more through informal migration, enterprise and

commercial/farming relationships. Is it possible that these relations are more important, and greater in reach and depth, than the formal cooperation? As French (2014) observes,

In time, the behaviour of these newcomers, the relationships they form with Africans, the way they conduct their business, their respect or lack thereof for the law, for local customs, for the environment, and, above all, for people, will do more to determine China's image, and perhaps even China's broad relationship to the continent, than any carefully planned actions by the Beijing government to build state power and reinforce national prestige. (French 2014: 6)

Chinese migration to Ethiopia has increased significantly in recent years as Chinese companies have expanded their presence in the construction, road building, hydropower, electricity, railroad, telecommunications, manufacturing and other sectors. Estimates of the number of Chinese in Ethiopia vary widely. A source in the Ethiopian Embassy in Beijing told one of the authors that there are 35,000-40,000 Chinese people living in Ethiopia.¹ A contact in the Chinese Embassy in Addis Ababa put that number at 20,000.² Of course, one has to keep in mind that many Chinese move back and forth frequently between the two countries, and accurate figures on the Chinese presence in Ethiopia are difficult to obtain and constantly in flux.

While there is clearly a substantial Chinese presence in Ethiopia, our research indicates that few Chinese are directly engaged in agricultural production. This is not due to legal or regulatory restrictions on farming by foreign individuals or corporations. Rather, Chinese involvement is limited by other factors such as the low profitability of agriculture compared to other branches of the food industry like restaurants and retail shops. Furthermore, local entrepreneurs are already producing sufficient quantities of some non-traditional commodities such as Chinese vegetables to meet market demand. An additional factor may be legal restrictions on foreigners in retail sales, which in turn prevents the kind of vertical integration of food businesses that is evident among Ethiopian entrepreneurs, and which is possible in other African countries. In fact, one of the salient findings of this study is that it is mostly local people producing non-traditional agricultural commodities for sale to Chinese customers in Ethiopia.

At least so far, the Chinese presence in the Ethiopian food and farming sector is dominated by independent entrepreneurs rather than large companies. Many were originally attached to large companies,³ and later branched out on their own once they became aware of the plentiful opportunities to do business in Ethiopia. As one former truck driver from Jilin put it, 'China doesn't have many blank spaces, whereas here there are many'. What

he meant was that virtually every business opportunity has already been exploited in China, whereas there are ample untapped opportunities waiting to be developed in Ethiopia. It is this combination of increased demand and promising business opportunities, coupled with entrepreneurial initiative on the part of Ethiopians and Chinese, that has resulted in the growth of food sector businesses to deliver non-traditional commodities.

This study traces the engagement of Chinese migrants in the supply and demand of three non-traditional commodities: pork, tofu and Chinese vegetables. Following a brief overview of relevant literature and methodology used in the study, we first examine the Chinese presence in each of these commodity chains, then go on to discuss the involvement of Chinese migrants in farms and restaurants. Later sections of the paper explore migrant networks, the opportunities that draw migrants to Ethiopia and interactions with the Chinese Embassy. The paper concludes with a discussion of the implications of the Chinese presence in the food and agriculture sector for Ethiopian development.

Literature and research methods

There is a substantial literature on foreign investment in Ethiopian agriculture (e.g., Davison 2014; Mosley 2012; FAO 2011; Lavers 2011; Makki and Geisler 2011; Oakland Institute 2011) and considerable attention to the issue of 'land grabs' in the country. However, the literature on Chinese investment in Ethiopian agriculture is sparse. As Bräutigam and Tang (2012: v) point out, this reflects the fact that the recent growth of China's investment in Africa is neither well documented nor well understood. Bräutigam and Tang provide an overview of China's engagement in Ethiopian agriculture and rural areas in historical perspective, tracing the evolution of foreign aid and investment by Chinese companies in the period between 1970 and 2011. They conclude that while China has long been engaged with Ethiopian agriculture and rural development, Chinese agricultural investment is not nearly as large as is generally believed.

Although Chinese investment in the agricultural sector in Ethiopia is limited, there is substantial technical cooperation between the two countries in agriculture, focusing on the transfer of agricultural technology and knowledge through training and demonstration. Current cooperation is based on the economic and technological cooperation agreements signed in 2006 and amended in 2007, which has resulted in: (i) an agreement to construct an Ethiopia-China Agricultural Technology Demonstration Centre in Ethiopia; and (ii) an agreement for the provision of Chinese instructors in agricultural technical vocational education and training (TVET) to Ethiopia (Alemu 2013).

While much is occurring at the official bilateral level in terms of agricultural cooperation between China and Ethiopia, this is clearly only part of the story. Delving beyond this level requires an ethnographic approach,

locating and engaging with Chinese companies, entrepreneurs and farmers to ascertain their motivations, aspirations and experiences in the country. In this regard, we are following in the path of other researchers tracing the story of Chinese migrants in Africa (e.g., French 2014; Guo Chatelard and Chu 2014; Mohan et al. 2014; Park 2012; 2009; Ho 2008; Dobler 2005; Ong 1993).

Two recent books are notable for their comprehensive and balanced approach to the study of Chinese migrants in Africa, and served as benchmarks against which to compare our findings in Ethiopia. Mohan et al. (2014) use case studies and surveys from four countries (Ghana, Nigeria, Tanzania and Angola) to illuminate the motivations, relationships and impacts of the most recent wave of Chinese migrants in Africa. The authors note that much of the discussion of China-Africa relations and the presence of Chinese migrants in Africa has been characterised by 'oppositional discourses' – such as the notion that the presence of Chinese people and companies is either a resoundingly negative phenomenon, or something that is markedly positive. The authors argue (Ibid: 3) that these polarised debates tend to 'reflect ideological standpoints as opposed to a focused engagement with reality', which is far more complex, and many of their findings resonate with those of this study.

French (2014) takes a more critical perspective on the Chinese presence – particularly the power asymmetries between Chinese and African actors – than does the previous book, but is no less nuanced or insightful. Like this study, his principal focus is on Chinese migrants rather than official cooperation, noting that 'history teaches us that very often reality is more meaningfully shaped by the deeds of countless smaller actors, most of them for all intents and purposes anonymous. In this vein, each of China's new immigrants to Africa is an architect helping to shape this momentous new relationship' (Ibid: 5).

To date there have only been a few studies focusing specifically on Chinese migrants in the food and agriculture sector of African countries. A notable example is Guo Chatelard and Chu (2014), which examines Chinese agricultural engagements in Zambia, with a particular focus on individual, private entrepreneurs rather than state sponsored investments. While this paper deals exclusively with farms and not food sector businesses, Zambia provides an interesting case to compare with Ethiopia, particularly given the larger number of Chinese farmers there. Another study of Zambia is Yan and Sautman's (2010), which traces the evolution of Chinese participation in Zambian agriculture from 'agro-socialist' to 'agro-capitalist' modes, and includes some information on Chinese commercial farmers. In spite of the greater Chinese agricultural presence in Zambia than in Ethiopia, both articles conclude that Chinese farmers are only minor players in commercial agriculture in Zambia.

Just as there is a dearth of information on Chinese migrants, there is a lack of reliable data on the production

and consumption of non-traditional commodities such as pork and vegetables in Ethiopia. Data on Chinese investment in the agricultural sector is also incomplete and often inaccurate. For instance, spreadsheets obtained from the Ethiopian Investment Agency in March 2014 list 41 Chinese investments in the agricultural sector in the period between October 1995 and November 2014, out of a total of 853 foreign agricultural investments. However, most of the phone numbers and email addresses of the contacts for these investments are no longer valid, so their existence was impossible to confirm. Visits to the locations of some of these notional investments showed nothing on the ground. According to several informants we interviewed, many of these investments exist only on paper. Our attempts to contact the Chinese investors listed in these spreadsheets by phone and email only uncovered two commercially operating farms: the Joy River Meat Company located in Butajira, about 130km from Addis Ababa, and a 10ha vegetable farm located about 60km outside of the capital. On the other hand, we did find several Chinese companies with plans to invest in agriculture. Overall, there appear to be very few actual Chinese farms in Ethiopia. These findings are consistent with Bräutigam and Tang (2012), who found only one such case,⁴ despite a significant record of Chinese engagement in agriculture and rural development in the country since official diplomatic relations between the two nations began in 1970.

This research was conducted by one American researcher fluent in Chinese and one Ethiopian researcher fluent in English and Amharic. Several other Ethiopian researchers provided assistance in trying to locate Chinese investments on the ground, and in gathering information. We attempted to locate Chinese farmers and migrants involved in other parts of the food industry by triangulating between Investment Agency lists, regional tours conducted by local research assistants and ad hoc investigations, based on snowball sampling. In Addis Ababa, much of this research was conducted in the Rwanda Market, which is the main place where Chinese and other Asian migrants go to buy meat and vegetables. Chinese restaurants were also important places for gathering data and making contacts. Other sites visited included the ATDC in Ginchi; Alage Agricultural College; and Hawasa, where Chinese agricultural experts are involved in a project of the UN Food and Agriculture Organization (FAO). Several Ethiopian research assistants also visited other locations in the country where Chinese agricultural investments were supposed to be located, and found no evidence of these investments on the ground.

The main methodologies used in the study were structured and semi-structured interviews together with participant observation. We conducted a total of 45 interviews, of which 43 were done during four visits to Ethiopia between November 2013 and December 2014, and another two interviews with informants based in China. In addition to these longer interviews, there were also a much larger number of shorter interactions with

Chinese and Ethiopians involved in the production and consumption of non-traditional commodities. Informants included officials from the Ministry of Agriculture, staff of the ATDC, instructors at Alage Agricultural College, hotel managers, restaurant owners, entrepreneurs, local vegetable and meat vendors and researchers at the Ethiopian Institute of Agricultural Research (see Annex 2 for a full list of interviewees). Interviews were conducted in Chinese, English and Amharic depending on the preference of the informant and ease of communication.

This study underscores the importance of multi-national research teams in examining subject matter of this kind. Collecting certain kinds of official data such as investment statistics; engaging with delalas⁵ and local vegetable vendors; and making visits to Ethiopian farms all required local connections and language skills that only an Ethiopian researcher such as the co-author of this paper could supply. On the other hand, engaging with Chinese informants in the restaurant, retail and farming sectors could only be done by a Chinese speaker. As a Chinese speaking American, the co-author of this paper was immediately able to engage with Chinese informants, and being a non-Chinese was actually helpful as it aroused curiosity and in some cases made Chinese people willing to talk and provide information. Where both Chinese and Ethiopian informants were present, we were able to piece together conversations and probe cross-cultural interactions that would have remained inaccessible had we been working individually. On the other hand, it was difficult for us to get access to the Chinese Embassy or other Chinese officials, who could be more easily approached by Chinese colleagues. There were also cases where Chinese informants such as tofu producers were unwilling to interact with us, for reasons that we were never able to ascertain.

Pork: New competition in a changing market

Pork production and consumption is increasing in Ethiopia, and Chinese are increasingly involved in its sale and consumption, though only on a small scale in its production. Pork is a non-traditional commodity in Ethiopia. Orthodox Christians and Muslims, who together constitute the majority of the population, are forbidden to eat pork as it is considered unclean by both their religions. Frederic J. Simons, the author of the book *Eat Not This Flesh*, visited Ethiopia in 1963 to conduct doctoral research and found no evidence of pork consumption anywhere. Simons observed in his book, 'I did not see a single pig in the country' (quoted in Aschalew 2012).

Recently, cultural proscriptions against the consumption of pork are starting to break down. The younger generation is more amenable to eating pork than their elders, particularly processed pork products. The diaspora is another factor spurring pork consumption, as Ethiopians accustomed to eating pork abroad return to their homeland. Demand for pork has also come from

the presence of foreigners, such as Cubans and Russians during the Derg era (1974-1991), and other nationalities in the last two decades. In recent years, the presence of large numbers of Chinese people in Ethiopia – particularly in Addis Ababa and surrounding areas – has significantly stimulated market demand for pork.

Ethiopia has the largest population of livestock in Africa, with approximately 35m cattle, 39m sheep and goats, 8.6m horses, 1m camels and 55.4m chickens (Solomon et al. 2003). By contrast, the pig population is tiny. According to FAO, Ethiopia had approximately 25,000 pigs in 2000 (FAO 2004), and this number had apparently risen to 29,250 by 2010 (Aschalew 2012).

In the 2011/12 fiscal year, Ethiopia imported 17t of pork, compared with 15t in the previous fiscal year. During the same year, domestic pork production amounted to only 1.7t (Aschalew 2012). Thus there is a small but growing market for pork in Ethiopia which farmers are increasingly capitalising on.

Data obtained from the Ethiopian Investment Agency shows records of 36 pig farming investment projects in the period between 26 May 1997 and 24 June 2013. Of these investments, 28 were by Ethiopians, 2 by Chinese, and 1 each by investors from Germany, the Netherlands, India, Sudan, Canada/Ethiopia and Britain/Ethiopia. Of these 36 investments, only four are listed as being in operation; the other 32 are classified as being in 'pre-implementation'. The phone numbers for the two Chinese investments listed in the Ethiopian Investment Agency database were no longer operating, and so impossible to confirm. Neither Chinese nor Ethiopian informants had heard of these farms, and they may only exist on paper.

Our research corroborates data from the Ethiopian Investment Agency that pig farming is dominated by Ethiopians. There is only one confirmed case of commercial Chinese pig farming: the ATDC in Ginchi, which has around 50 pigs as well as 18 cattle and 1,500-1,600 chickens. The ATDC has to sell some of its pigs, cattle, chickens and vegetables in order to support its operational costs, despite the fact that marketing is not part of the original cooperation agreement between the Chinese and Ethiopian governments. The Centre sells to Chinese and local middlemen, as well as to Chinese companies operating in the vicinity, but their marketing efforts have been hampered by the fact that they are not allowed to open a shop for direct sales, nor are they permitted to issue receipts.⁶ The fact that they cannot issue receipts presents a problem for Chinese and other businesses, which need to show a paper trail for tax purposes.

In addition to the ATDC in Ginchi, there were rumours of Chinese involvement in pig farming both in Addis and surrounding areas, but these anecdotes were impossible to confirm. The largest pig farm in Ethiopia is the Alage Agricultural College, in the Eastern Shoa Zone of Oromia,

which has about 3,000 pigs. According to an official of the Ethiopian Institute of Agricultural Research working in the livestock sector, there are about 89 farms in the Addis area which raise pigs, some of them large and some of them small, mostly run by local people.⁷

Debre Zeit is a centre for meat production, with some 15 farms engaged in pig production. According to an official from the local Trade and Industry Office who served as our guide in Debre Zeit, all of these farms are run by Ethiopians. Our visits to farms in Debre Zeit and in Addis did not reveal any evidence of Chinese capital involvement in the farms, which appear to be wholly owned and operated by Ethiopians, although Chinese are major customers for the pork. Ethiopian informants told us that Chinese are the main customers for pork in Ethiopia, although the capital has a large population of other foreigners, many of whom also eat pork. Pork is on the menu at hotel restaurants and is sold in many supermarkets. A researcher with the Ethiopian Institute of Agricultural Research contended that '80-90 percent of the customers for pork are Chinese. It's just a question of the marketing route. The main customers for pork are Chinese, hotels and supermarkets.'⁸

The slaughtering of pigs requires a special permit, which only a limited number of facilities in the country have. The main slaughterhouse for pigs is in Addis. Customers take their live pigs there, and slaughtering takes place several times per week. Sanitation standards at the facility are said to be poor. In addition to the main slaughterhouse in Addis, two companies in Debre Zeit – Prime and Alema Farms – have their own facilities for slaughtering pigs as well as other animals. While the only legal facilities are the ones with special permits, we were told by several informants that there are Ethiopians who slaughter pigs in their houses without the required legal permits, and in fact maintain higher hygienic standards than the government facility.

Based on our own observations, the majority of customers at meat shops in the Rwanda Market in Addis Ababa appear to be Chinese. There are also other foreigners, particularly other Asians, as well as Ethiopians coming to buy in bulk for their own shops. At the Alema Farms store in Debre Zeit, which sells meat and eggs from their farm, the staff informed us that the main customers for fresh pork are Chinese. Chinese patronage is evident from the signs in Chinese throughout the shop. Local people mainly buy chicken and some processed pork. However, the presence of pork in these markets can be a deterrent to locals. As one local shop owner in the Rwanda Market told one author, 'some Ethiopians, even though they want to buy chicken or fish, when they see the pork, they go.'⁹

Customers' preferences for different parts of pigs, chickens and other animals are another distinguishing factor along ethnic lines. One of the authors was told that 'only Chinese eat chicken feet'. Local shop owners marvelled at the fact that Chinese ate all parts of the pig.

'They eat the heart, the tongue, the intestines, the liver and the stomach. The only part they don't like is the lungs. The feet and the ear they like very much. They also like the tail, and the blood. But we don't sell pig blood here. It's very difficult to bring the blood from the slaughterhouse. They just pour it on the floor.'¹⁰

According to Ethiopian law, foreigners cannot operate retail businesses and licenses can only be obtained by Ethiopians (FAO 2011: 20). However, our research found that Chinese merchants are involved in the sale of pork and other products, usually with licenses obtained by Ethiopian partners. This is a source of resentment among local shopkeepers. As one owner of a local meat shop told me, 'when we started, business was good. Now it is going down. The Chinese always want to support each other, even if I give the same price. Chinese prefer to go to Chinese.'¹¹

One local shopkeeper is Mr. Amoudi, a 40 year old graduate of Addis Ababa University in animal science. Before opening his meat shop in the Rwanda Market ten months ago with his business partner Mr. Abebe (who is a graduate of Addis Ababa University in marketing), he had previously worked for the Ministry of Agriculture, as well as for the US Embassy, at the airport and at a number of other jobs. His shop sells pork, chicken and fish. Their pork comes from three farms in Debrezeit, including Prime, Alema and one other, all of which are Ethiopian owned. Business is good, he tells us, but now Chinese vendors are competing with them. Most of his customers are Chinese, and they are the principal customers for pork. Ethiopians only buy chicken and fish. There are a smattering of other foreign customers as well. His shop is spotlessly clean and tidy, which is undoubtedly one of its appealing features for customers. He informed us that most of his Chinese customers are from large Chinese companies such as construction, railroads, road building and telecoms. They come with trucks and buy in bulk for their companies. Some restaurant owners also patronise the shop. 'Chinese [have been] coming here since 2011,' he explained. 'Before that, this was a very small market. It's good to have the opportunity to sell in this market. It's because of the Chinese that we have this shop.' While acknowledging the fact that their meat business is largely due to Chinese demand, he resents the competition from a growing number of Chinese run shops in the area. 'Foreigners cannot have wholesale or retail licenses in Ethiopia. The Chinese are opening a shop right nearby, but they get the Ethiopians to obtain the license for them. Some Chinese meet local girlfriend, then girlfriend opens the shop.' This resentment is further fired by a perception of uneven implementation of existing policies meant to protect local Ethiopian businesses from foreign competition. As this same vendor explained to us, 'It is not allowed to rent licenses, but many do it without a license. The rules and regulations are more tight on us than on Chinese. If I don't have a license, they will close my shop. The competition is unfair.'¹²

Tofu: Filling a niche production area

Tofu is the one non-traditional commodity whose production is monopolised by Chinese. Customers purchasing tofu are mostly Chinese, with a smattering of other Asians such as Koreans and Japanese. Ethiopians on the whole are not familiar with tofu, although it is beginning to win local converts, particularly as a fasting food.¹³ As one young boy working in the Rwanda Market told us, 'it is made by Chinese, but I like it.'¹⁴

Some of the larger Chinese restaurants, such as the one in the Guangdong Hotel in Addis Ababa, make their own tofu using soybeans bought from the local market. However, most Chinese restaurants purchase their tofu from vendors. Tofu is generally not available in supermarkets in Addis Ababa, and must be purchased from specialty shops, of which there were only a couple during the time of research. Only very recently are some supermarkets starting to stock tofu. While the shopkeepers selling tofu were very approachable and willing to provide information, the tofu producers refused to talk to us either in person or over the phone, and so relatively little is known about them other than the fact that they are Chinese.

Mr. Bekele is the co-owner of a small tofu shop near the Rwanda Market. The shop consists of one tiny undecorated room with plain white walls. A large refrigerator, a table and a couple of chairs are the only furnishings. Three kinds of tofu are available, including fresh tofu in large blocks, and two varieties of dried tofu – large squares of *dougan* and sheets of *doupi*. No other products are sold in the shop. Mr. Bekele is a friendly 32-year-old from Addis Ababa. He is a devout Christian with a wife and three young children. Before getting into the tofu business, he served in the army, and later worked as a driver. He has six brothers, one of whom works for a Chinese furniture business and has been to Guangzhou. It was this brother who introduced him to his business partner, a Chinese man who produces the tofu. Mr. Bekele mans the shop. He has also learned how to make tofu from his Chinese partner, although he lacks the tofu making equipment and resources to purchase them which would be needed to start his own independent shop. According to him, the capital for this shop is about 50 percent his and 50 percent that of his business partner, and they split the profits 50-50. Average gross income from the shop is about 20,000-30,000 birr (US\$950-1,450) per month, 'sometimes less, sometime more.' He says that there are only two shops selling tofu in this area: his and a vegetable shop nearby run by a Chinese lady (Miss Tang, profiled below). The tofu shop has only been open for a year, and mainly serves a Chinese clientele, along with some Japanese and local people. The Chinese Embassy also buys from them. They don't do deliveries, so all customers must come to the shop. Many of them call first to place an order, then come to

pick it up. His shop sells tofu by the kilogram (1kg = 30 birr), and most customers buy 20-30kg at a time. The smallest amount they sell is 1kg. Although tofu is a new food in Ethiopia, Mr. Bekele told one of the authors that 'I eat it every day in the morning, with some oil, tomato and spice, just like egg.'¹⁵

Vegetables: A market dominated by locals

Chinese are the main source of demand for Asian vegetables in Ethiopia. While they are involved in the production and to a limited extent in the marketing of these vegetables, most of the farms and shops are run by locals. The Rwanda Market in Bole is the primary place that Chinese companies and restaurants go in Addis to obtain meat and Chinese vegetables for their kitchens. Taking its name from its proximity to the Rwandan Embassy, the market is a dense cluster of small open air shops situated on either side of a dusty cobblestone street which quickly turns muddy in the rainy season. The stalls directly adjacent to the street sell vegetables, fruits, live chickens and eggs, with a smattering of general food and butcher shops mixed in. Farther back behind the fresh food vendors are shops selling grains, beans, condiments, shoes, clothes, utensils and house supplies. The sour smell of rotting vegetables permeates the air in some parts of the market. Other areas are redolent of spices. Cats saunter in and out of shops, and shopkeepers chatter amongst themselves as they await customers. The overall impression is of a bustling, semi-ordered chaos.

Cars are parked on either side of the street, leaving only a narrow bit of road for other vehicles to pass through. Nonetheless, cars pull up constantly with buyers. Trucks affiliated with Chinese state owned and private companies come to buy in bulk for their cafeterias. Some firms have established relationships with vendors which allow them to buy on credit and then pay off their bills on a regular (e.g. monthly) basis. Chinese and other Asians are the primary customers for vegetables sold in the Rwanda Market. As a local vendor told me, 'many Chinese come from different places to this market, because the types of vegetables available here are not available elsewhere. Even sometimes they come from Djibouti [560km away].'¹⁶

While the customers are mostly Asians, the vast majority of the vendors are locals. Many local vendors have learned a bit of Chinese, and can bargain with Chinese customers. While several local vendors we talked to claim that Chinese prefer to go to Chinese run shops, this is not always the case. One young Chinese woman working for a Chinese state owned construction firm who we ran into in the Rwanda Market informed us that she didn't like the people at the one Chinese run vegetable shop in town and so prefers to purchase her company's vegetables from a local vendor. 'The people are nice,' she

told me, 'and there is a [wider] variety of vegetables, so I prefer to come here.'¹⁷

While the assortment of fruits on sale in the Rwanda Market is no different from other markets in Addis, the array of vegetables on offer is far larger, with many Chinese varieties such as bok choy, choy sum, garlic sprouts, bean sprouts, Chinese cabbage, chives, gourd, green onions, mustard greens, white radish and taro which are not found elsewhere in the city. The variety of vegetables is impressive and is similar to what one would find in China.

The central market for fresh produce in Addis is Atkilet Tera, which takes place very early in the morning and is predominantly managed by one extended family through a strong network of delalas. There are also smaller satellite markets such as Rwanda, Yeka, Gerji, Addis Sefer, Saris and Chirkos. As part of this study, we also visited other vegetable markets to compare the produce available therein and to try to ascertain the degree (if any) of Chinese involvement. Comparing the types of vegetables available in the Rwanda Market with those in other markets frequented by Ethiopians can also give a sense of which vegetables are exotic and which are local, but in some cases it is hard to tell (see Annex 1 for a detailed list).

While local vendors in other markets such as Gerji – which are not frequented by Chinese buyers – were quite open and willing to talk about the sources of their vegetables and other details of their operations, this was not the case in the Rwanda Market. On the whole, we found local vendors there to be very reluctant to discuss aspects of their businesses such as the sources of their produce, where their capital came from, and whether Chinese people were involved in their operations in any capacity. This was not simply a question of language, as our team included both Amharic and English native speakers. Thus while the majority of the vendors in the Rwanda Market are locals, it proved difficult to trace the degree of Chinese involvement in the market beyond serving as its primary customers. As a Chinese informant from Jilin who had previously run a vegetable farm in Debre Zeit and was familiar with the Rwanda Market told us, the reason local vendors were so reluctant to discuss the details of their operations was that they were afraid that we would open a business and compete directly with them.¹⁸ Another reason that local vendors are afraid of providing detailed information is because of taxes. The amount of tax assessed on such shops is often determined subjectively based on the tax collector's estimate of the extent of transactions and amount traded.

Information gathered from a number of local and Chinese sources indicates that most of the vegetables in the Rwanda Market come from locally run farms. A few vendors in the Rwanda Market who were willing to give us some information told us that their produce came from local farms in Debre Zeit. One mentioned the

Gloria Farm in particular. The few Chinese farms in the region also market their produce at the Rwanda Market.

There is only one Chinese run vegetable shop in Addis, and in fact only one that we know of in the entire country. It is located on the outskirts of the Rwanda Market near Bole Road. The shop is medium sized and minimally decorated, with large burlap sacks on the floor near the front entrance overflowing with carrots, eggplant, potatoes, peppers and other vegetables. Bins full of every conceivable Chinese vegetable line the walls on one side of the shop. On the other side is a shelf next to the wall with green plastic basins containing large blocks of tofu soaking in water. In a refrigerator near the back are plastic bags full of meat, as well as metal plates stacked with innards. The shop also sells dried noodles and an assortment of condiments.

The shop is run by Miss Tang, an energetic 24-year-old from Dalian in Liaoning province who moved to Ethiopia two years ago, brought here by a friend in the construction business who requested her help. She soon saw an opportunity to get into the vegetable business, and now runs the shop together with a local Ethiopian partner who supplied the license. She started the shop with her own capital. 'It didn't take much', she told one of the authors, 'just enough for rent and a refrigerator.'¹⁹ Her older male cousin recently came over from their hometown of Dalian to help her. Business is brisk, as is clear from the trucks constantly pulling up to the shop to buy her vegetables, tofu and pork. Most of her customers are from large Chinese firms doing business in Ethiopia, as well as some restaurants. The Chinese companies buy in bulk for their cafeterias, as Chinese vegetables are not available from most markets. The shop also delivers vegetables for several large Chinese companies, one in the railroad business and two in the cement business. Some of these customers buy on credit, paying for their goods every month or so. 'There are more and more Chinese here, so business is good.' She says that her average gross income from the shop is around 100,000 birr (US\$4,900) per month.²⁰ The shop carries around 30 different kinds of vegetables, including local varieties such as red onions, carrots, potatoes and green beans, as well as a large assortment of Chinese vegetables. The vegetables come from the ATDC, as well as an assortment of local farms in Debre Zeit. Miss Tang sends a truck to pick up vegetables and meat from the ATDC around twice a week, or whenever there is a need for fresh produce. Chinese farms such as the ATDC must partner with shops such as hers, because they only have investment licenses, not the business license necessary to sell goods directly. Due to the success of her business, she plans to stay in Ethiopia another 4-5 years. In the meantime, she is in the process of opening up another vegetable shop in Debre Zeit.

Food production: Chinese farms in Ethiopia

Our research only found three Chinese farms in Ethiopia at the time of this writing. The largest and most prominent is the ATDC, which was established through a cooperative agreement between the Chinese and Ethiopian governments. Though it does engage in the sale of fresh vegetables and meat, it is not a purely commercial venture. A chance encounter with an Ethiopian vegetable buyer at the gates of the ATDC in October 2014 also led to the discovery of a 10ha vegetable farm about 20km away which is run by a young Chinese man from Chengdu. One other farm was located through data obtained from the Ethiopian Investment Agency, namely the Joy River Meat Company located in Butajira, about 130km from the capital. Their farm is small (1ha), and raises chickens primarily for eggs, selling them to restaurants and supermarkets.

The ATDC is the best known Chinese farm in the country, and is situated in a sprawling 52ha compound in Ginchi about 80km from Addis. The compound is very orderly and well laid out. Paved roads make every part of the compound accessible, and it is large enough that some of the staff get around on motorbikes. Neat rows of radishes, chives, Chinese cabbage, bok choy and celery stretch out into the distance, separated by narrow irrigation canals. On the opposite side of the road is a large man made pond stocked with fish which also serves as the main source of water for irrigation. Further afield are corn fields, greenhouses, and the buildings where the Centre's pigs, chickens and cattle are housed. Low lying hills beckon in the distance. The air is fresh and clean, a welcome contrast to the dusty roads and trucks spewing diesel exhaust along the journey from Addis. The only buildings in the compound are single story, and one has a sense of vast open space altogether absent in the cities.

The ATDC is divided into 12ha of grain experimental area, 12ha of natural pasture, 8.4ha of vegetable production area, 4.6ha of experimental area, 1.1ha of animal husbandry area and 1.12ha for office, living and training space. ATDC staff have experimented with 46 different types of vegetables, and picked 32 varieties that are suitable to conditions in Ethiopia. The vegetables grown at the ATDC include Chinese cabbage, cabbage, chili, celery, leek, mustard greens, onion, garlic, eggplant, tomato, lettuce, cucumber, radish, carrot, broccoli, green beans, snow peas, pumpkin, spinach, chives, green onion, zucchini and gourd.

The main work of the ATDC is training and dissemination, which, according to the formal agreement signed by the Chinese and Ethiopian governments, must be at the request of local partners. Numerous trainings have been held for Ethiopian technical staff and for farmers, which included material on the production

of Chinese vegetables. These trainings are conducted for different durations of time, such as three months, one month or 3-4 days. Some farmers have expressed interest in obtaining vegetable seeds, but ATDC does not honour such requests, since 'we do not have extra seeds for the farmers.' ATDC staff also said that 'dissemination of seeds is not allowed' by the extension department of the Ministry of Agriculture.²¹ All their seeds come from China, although the staff said that some may originally be of foreign origin. They only brought seeds over once in a single shipment with all other supplies for the Centre, and were still using their original seed stock at the time of this research. Seeds can keep for several years in this dry climate.

The ATDC has 14 Chinese staff, along with 1-2 staff from the Ministry of Agriculture, and around 160 local staff, some of whom are seasonal workers. All Chinese staff have technical backgrounds in agriculture and come from Guangxi, except the two translators (one is from Hunan and the other is from Anhui). While in Ethiopia, they are all employees of the Guangxi-based Bagui Company, which won the bid to run the ATDC, although only three of them are actually permanent staff of Bagui. Bagui was originally under the administration of the Guangxi Agricultural Bureau and is now a semi-independent company. According to the current plan, all Chinese staff will be leaving the ATDC in November 2015 and returning to China. It is uncertain what will happen to the centre after that, as it was originally supposed to revert to control by the Ethiopian Ministry of Agriculture.

The ATDC markets its meat and vegetables through Miss Tang's shop in Addis, and to Chinese companies in the surrounding area, such as the electricity firm which was working in the vicinity when one of the authors visited the ATDC in December 2014. Prices are set by negotiating with vendors. At first, they took their vegetables to Addis to sell, and it was then that they met Miss Tang, and began selling through her shop. Although the original agreement between the two governments did not include marketing, the ATDC has to rely on sales of its produce to meet part of its operating budget. Yet at the same time, the Centre cannot directly open its own shop. 'So buyers can come to get the produce,' one of the staff members explained, 'but we can't go out and sell it. This is because the Ethiopian government considers this to be a public welfare project. If you belong to a government agency, you can't get directly involved in market competition.'²² Staff members emphasised that they are not trying to make profits, but rather trying to offset some of their expenses. As one ATDC staff member explained to us, 'this is a long term project; what can we hope to gain [in monetary terms] from years of being here? The Chinese government takes a long term view, and hopes to establish good relations with African countries. It's not only about making money ... we really hope to help Africa ...'

Located about 20km from the ATDC is a 10ha farm run by Tao, a young Chinese man from Chengdu, and his wife. Tao is 24 years old and came to Ethiopia with his girlfriend when he finished high school at the age of 19. They are now married and at the time of this writing were both back in China for the birth of their first child. They were classmates at school and she convinced him to go to Ethiopia, where her father was already working as a businessman. The farm is in the name of Tao's wife, as she bought it from an Indian investor. Tao speaks excellent English, and is very proud of this given the fact that he finished his education after high school.

Tao and his wife started the farm three years ago. They began by farming oranges, but switched to vegetables when the orange trees failed. They have 1ha for radishes, 1ha for cabbages and another small section for zucchini. Large portions of the farm are unused, in parts overgrown with meskel flowers. They appear to be using only about 30-40 percent of the available farmland.

Neither he nor his wife had any background in farming before they arrived. They learnt everything they know about farming by searching on Google and Baidu, a Chinese search engine. He jokes that it was certainly very difficult, especially with all the misinformation on the internet: 'There are always some people that say they've farmed oranges in Ethiopia, which is not true. They are terrible people!'²³ They originally hired several workers from Sichuan who were supposed to be experienced in the cultivation of orange trees, but Tao said that this was clearly not the case as the trees failed. Most of them have gone back to China now and only one remains.

Having switched to vegetables, he says that 'I grow radishes because it's the only thing I'm good at!'²⁴ He explained that the first batch of radishes came out looking like ginseng, with roots going off in all directions. So he searched online and found that it was because he had to till the soil better before planting them. They now grow much better. One of the farm hands was washing some of the uprooted white Chinese radishes while we were there as they were preparing to take them to market the next day. The seeds for their radishes were bought in South Korea by his father-in-law who went there to market the textiles he produces in Ethiopia.

Tao says that only Chinese people buy their vegetables. He takes his produce down to Addis Ababa to sell at the Rwanda Market. He also has a network of Chinese construction companies that contact him for vegetable deliveries. He claims he has an advantage over many local growers when selling to the Chinese construction companies, because construction groups can only work in the dry season – when local vendors are not producing – and are generally back home in the wet season. The dry season is also the hardest time to grow vegetables, but he is able to overcome this due to an irrigation system on his farm.

Tao said that the farm didn't make much money, and that he doesn't like working in agriculture and would like to leave as soon as possible. He's not sure what he'd like to switch to, but suggested some kind of business in Addis as a possible alternative to farming. Referring to the trend of Chinese migrants setting up farms in Africa, he observed that 'people in China are obsessed with owning a bit of land. For most 100m² is enough.'²⁵

Chinese farmers like Tao are a rarity in Ethiopia. In fact, one of the salient findings of this study is that it is mostly local people producing non-traditional agricultural commodities for sale to Chinese customers in Ethiopia. The owner of a Chinese restaurant in Addis offered an explanation for this. 'In the past there were Chinese people involved in growing vegetables, but it's difficult and tiring work, and doesn't make much money. Chinese investors are looking for a quicker return. Locals are also afraid that too many Chinese will come here, and invest too much money.'²⁶ He also mentioned that establishing a farm requires dealing with the government, and that 'Chinese people don't like to have to deal with so much trouble, and so they don't bother.' Other reasons include the difficulty of locating suitable land, poor rural infrastructure and better opportunities in other sectors.

This explanation for the sparse Chinese presence in agricultural production is partially confirmed by David Huang, the former owner of the Beihua vegetable and pig farm in Debre Zeit. Mr. Huang started the farm of about 7ha in 2009, growing around ten varieties of vegetables for sale to Chinese companies and also for use in the restaurant that he ran. He left Ethiopia in early 2013 to return to Shenyang with his wife, a Chinese who he met in Ethiopia. He said he left Ethiopia mostly for the sake of his child. While his restaurant was profitable, he complained that he didn't make much money from his farm. He claimed to be the only Chinese person running a farm in Ethiopia at the time, and that the other Chinese farms registered with the Ethiopian Investment Agency existed only on paper. The low profitability of agriculture compared with other businesses is a commonly cited reason for why Chinese entrepreneurs avoid this sector. For David Huang, government restrictions were not a problem for his farm; in fact, he said that the government had actually encouraged him.

We didn't find any evidence of Chinese investment in local farms either, although it may be happening in ways which are difficult to trace. The fact that there are few Chinese run farms in Ethiopia is noteworthy, and stands in contrast with the situation in some other African countries. For instance, in Zambia there are two Chinese state farms and about 30 private Chinese farms (Guo Chatelard and Chu 2014: 5).

Aside from the ATDC, the few Chinese farms that do exist in Ethiopia are small, and it appears that large Chinese companies are not yet involved in commercial agricultural production. Furthermore, all of these farms are producing exclusively for domestic consumption,

not for export.²⁷ However, all of this may change in the near future. One large Chinese company we contacted in Ethiopia is considering investments in the agricultural sector, and a second company is already in the process of investing. The first company is CGC Overseas, which is a large Chinese conglomerate with a substantial presence in Africa. CGC Overseas has already achieved considerable success in Nigeria in crop breeding and seed production (particularly rice), and is considering large scale investments in Ethiopian agriculture as well.²⁸

Another Chinese firm that is poised to invest in Ethiopian agriculture is Sino Trust Investments (Beijing) Co. Sino Trust Investments is a private conglomerate based in Beijing, with an affiliated firm specialising in agriculture called Tianyuan Agricultural. Their firm focuses on engineering, and that is where most of the company's revenues come from. Their engineering projects have gone very well in Ethiopia, and are still expanding. At the same time, they are interested in moving into other areas such as agriculture. Their firm came to Ethiopia in 2008, and had begun agricultural projects in 2014.²⁹

The company's interest in agriculture comes from the fact that they see this as a strategic area for the future – particularly given China's growing need for food imports – and because they had a former consultant from the ATDC who convinced them that agriculture was worth investing in. This consultant has since gone back to China, and has not returned, but their interest in agriculture remains, and they have been using their profits from engineering projects to underwrite investments in agriculture.

So far their agricultural projects are in the initial stages and have not generated any returns. They have been conducting experiments with rice cultivation on 2ha of land in Afar state, and have the potential to expand to a larger area (500-2,000ha) in the same locality. They brought around ten varieties of rice from China, and conducted experiments to try to select varieties well suited to local conditions. After some initial problems, they have found several rice strains that do well in the climate, with yields that are comparable to those in China. They have a second area of land in Meki north of Ziway Lake, where they have recently acquired 40ha of land that they plan to grow vegetables on. Apparently they have been looking for land suitable for vegetable production for a long time, but have had difficulty locating land in an area with good transport links and possibilities for irrigation.

Adding value: Chinese restaurants in Ethiopia

There are at least 15 Chinese restaurants in Addis Ababa, which serve as social gathering places for the Chinese community, and this number is increasing all the time. In the period between November 2013 and December 2014 when this research was conducted, four new Chinese restaurants opened in the Bole area

alone. Chinese restaurants have played a crucial role in stimulating demand for non-traditional commodities such as pork and Chinese vegetables. Most restaurants buy their vegetables and meat directly from the Rwanda Market. A few have them delivered to the restaurant by local middlemen. The restaurant owners we interviewed choose their produce based on price and quality; they do not necessarily go to Chinese run shops. As the owner of a hot pot restaurant explained: 'I don't go to a particular place every time. There are many shops. I go to whichever one has the freshest meat and produce. The prices are all about the same. If it's not very fresh, we can't use it. For hot pot, everything has to be fresh or customers won't come. I don't necessarily buy from Chinese vendors; most of the shops are run by locals.'³⁰

These restaurants are independent businesses scattered throughout the city. This type of business does not appear to be guided in any way by policies and investment incentives from above, but rather by individual entrepreneurs seeking to take advantage of market opportunities. In fact, according to the Chinese restaurant owners we interviewed, official policies can often be a hindrance, such as the difficulty of obtaining business licenses. Opening a restaurant requires an initial investment of US\$200,000, which must be transferred to a local bank account. The money can then be used for the expenses of the business. A few restaurants such as the one located in the Guangdong Hotel are integrated with hotel operations, serving both the hotel clientele as well as other patrons.

One key difference between Chinese and Ethiopian businesses in the food industry is their degree of vertical integration. The case of the business conglomerate composed of Fantu Supermarkets, the Wassamar Hotel and its associated livestock farm is a prime example of vertical integration. As the Ethiopian owner described to us, when he started his supermarket chain 25 years ago, he faced a serious shortage of milk and meat, including pork. He was also concerned about the sanitary conditions in small meat shops. His response was to open a production and processing facility on the outskirts of Addis which produces pork, milk and cheese. He also buys pigs from other facilities. He once had around 2,000 pigs, but these numbers have dropped drastically due to disease, and his farm now only has about 100 pigs. He slaughters the animals in his facility and also produces processed pork on site.

By contrast, Chinese operations in Ethiopia are unable to attain this level of vertical integration due to controls on retail business operation by foreigners. For instance, the Guangdong Hotel cannot operate a supermarket or a farm, and so must purchase its meat and vegetables from suppliers. The situation in Ethiopia stands in sharp contrast to that of other African countries, where Chinese entrepreneurs are engaged both in retail operations and in running farms.³¹

One common feature of the Chinese migrants we interviewed who started restaurants in Ethiopia is that they didn't come to the country for this purpose. They came for other reasons, and then got into the restaurant industry when they saw the opportunities afforded by this sector. One such example is Mr. Lu, who is the owner of one of the oldest Chinese restaurants in Addis. He came to Ethiopia in 2000 on a World Bank funded road building project, where he worked as a cook for 4.5 years until his project finished. Rather than return to China, he decided to stay on in Ethiopia and go into business himself. He is from Shijiazhuang in Hebei province, as are all of his Chinese staff. This is a large restaurant, with several stories and a number of private rooms. When one of the authors came here for lunch one day, he was the only customer. Aside from the three Ethiopian waitresses, there was no indication from the interior décor that the restaurant was located outside China. The TV was blasting Chinese game shows, to be replaced a bit later by a maudlin soap opera. Mr. Lu was asleep on the couch when the author came in, and it was only later that we discovered that he is the owner. The restaurant is in its fifth year, but now it is harder to obtain a business license than when he first opened the place. He got the idea for the restaurant because of the large numbers of Chinese that were working in Ethiopia on World Bank and other projects, and because his original profession was as a cook. 'As African countries go,' he said, 'Ethiopia is relatively stable politically. But it is not such a good place to do business. Taxes are high. Foreign exchange controls are strict. Rent is also high, so my profits are low.'³²

Starting one's own business after being employed elsewhere is known in Chinese as 'jumping into the sea' (*xiahai*). Another migrant who made the leap is Mr. Fu, a short, stocky 44-year-old from Dujiangyan in Sichuan province. A former cook in an aeronautics company, he was sent by his firm to Dubai before being transferred to Ethiopia. After half a year at his firm in Ethiopia, he left to start his own business selling pork and fresh fish at a stall in the Rwanda Market. He claims to be the only person in the city who sells live fish. Later on he also opened his own restaurant specialising in fresh fish and Lanzhou style dishes. Referring to larger Chinese restaurants, he remarked: 'there's no need to step on others' toes. My restaurant will have things they won't have.' He sees real business opportunities in Ethiopia, both because there are so many gaps in the market waiting to be exploited, and because relatively little capital is needed to start a business. 'In Dubai, you need at least US\$100,000 to do anything, whereas here US\$10,000 is enough.' Mr. Fu closely works with delalas who link him to anything he needs to obtain, including house and car rental, workers for hire and suppliers of live fish. Mr. Fu has a young Ethiopian wife who helps with the shop and obtained the shop license. She recently gave birth to their first child. His local wife – who is under contract³³ and receives a monthly salary – was also introduced by a delala. Mr. Fu also has a 21 year old daughter back in China, and apparently divorced his wife there some years ago. Mr. Lu comes from a Protestant family. 'I'm a

bad Christian,' he said, referring to his local marriage. 'I hope God forgives me.'³⁴

Through Mr. Fu we met Mr. Li, a former truck driver in his forties from Jilin province. Mr. Li is a balding, burly man with a dark complexion and a ready smile. He came to Ethiopia in February 2014, on the direct flight from Beijing to Addis. He had only been there one month when one of the authors first met him in March 2014. He came to Ethiopia based upon an invitation from Mr. Fu, who knew a friend of his in China. Mr. Fu needed help with his live fish shop, and also to start his new restaurant. At the time the two didn't know each other, and they only met for the first time when he arrived in Addis. When one of the authors returned to Addis in September 2014, Mr. Li had already started his own hot pot restaurant not far from Mr. Fu's venue. Judging from the packed tables, business seemed to be booming. This is a relatively small restaurant, with only six tables and five private rooms, very clean and well maintained. The décor is very simple – wood linoleum floors and white walls with no adornment. Mr. Li stands behind the front counter preparing the accounts, while directing his local staff. On an adjacent table are 16 different sauces and condiments for hot pot. He and his cook from Henan province are the only Chinese in the establishment. In spite of the steady Chinese clientele who flock to his restaurant for the authentic hot pot, he lamented the fact that the income from his restaurant is not that great, only about 3,000-5,000 Birr per day. 'This is the best I can do, so it's not worth it. And I'm busy here until 1 or 2 am every night, it's really too tough!'³⁵

Making ends meet: The importance of migrant networks for Chinese migrants

Whether they are in the restaurant sector, in retail or in farming, Chinese migrants in Ethiopia rely on their social networks – known as *guanxi* in Chinese – to do business. These networks can take the form of kinship relations (*xueyuan guanxi*), regional affinities (*diyuan guanxi*), friendships or work colleagues. As one entrepreneur explained, 'Chinese people attach a lot of importance to *guanxi*.' When asked which type of *guanxi* he relies on most in his business, his reply was it is all of the above. 'As you say, all of those are there. The regional [contacts] are the fellow northeasterners, which is a big group. The second are friends. If you and I are friends, you introduce me to your friends, and we get to know each other gradually. It's like that ... today your friends become my friends, my friends become another person's friends, and so the network expands in this way.'³⁶

While there are a number of forms of *guanxi* in operation, all of the Chinese migrants we interviewed came to Ethiopia either because their company sent them there, or because of a personal connection with a Chinese person based in the country. None came there solely

on their own resources. As one key Chinese informant put it, 'people who come here all have some *guanxi*.'³⁷ For instance, the restaurateur Mr. Li came to Ethiopia because a mutual friend knew Mr. Fu, who needed help with his live fish business and his planned restaurant. Miss Tang came because a friend in the construction industry requested her help.

Studies of Chinese migrants (e.g., Mohan and Kale 2007; Dobler 2005; Ong 1993) have noted that family ties lie at the core of transnational networks among the Chinese diaspora. Kinship ties are clearly also key for many Chinese migrants in Ethiopia in the operation of their businesses. For instance, when Miss Tang needed help with her vegetable shop, she turned to her older cousin, who came over from their hometown of Dalian and now mans the shop each day. When one of the authors visited Ethiopia for fieldwork in December 2014, Miss Tang's father was also there, visiting for one month to help out with the shop. Relying on relatives affords a level of trust, and also of permanence, that is difficult to replicate. For some migrants in the food and agriculture sector such as Miss Tang's cousin, the presence of a relative in Ethiopia became the impetus for their coming to the country in the first place. Miss Wang of the Joy River Meat Company also came to Ethiopia from Fujian because her husband was already employed with the same company. Another example of this is Mr. Na, the former restaurant owner from Tianjin, whose grandfather spent over ten years in Ethiopia and opened several factories, including a plaster factory, in the country. Mr. Na originally came to Ethiopia because of his grandfather. He took over the plaster factory, which is still operating, when his grandfather died.

At the same time, relying on relatives also has its limits for Chinese migrants. Many do not have the option of bringing their families over, or do not wish to. As Mr. Na explained, 'most women have jobs [back in China], and can't give them up. They can't come to Africa and bring the children over.' Some migrants like Liang didn't want to bring their wives over, both because of their spouses' jobs back home, and because they felt conditions in Ethiopia were unsuitable for their families. Another key reason is children's education. While this is less of an issue for very young children, it becomes a major factor once children reach elementary school, and need to keep up with their peers in an intensely competitive educational system that is based on testing at every level. Once children spend several years outside of this system, it is difficult to catch up, which then precludes the option of attending college in China. While the children of European and American expats in Africa can attend international schools, for Chinese parents this is only an option if they wish their children to attend college outside China.

For some migrants such as the employees of the ATDC, bringing their families over was never an option. While a few ATDC staff have had their families visit Ethiopia, this was only for a few weeks. Their employment contracts do not allow for bringing family members, and the

ATDC facilities were also not set up for this. Some staff of Chinese companies with offices in Ethiopia are in the same situation. For instance, the staff of Sino Trust Investments are based in Ethiopia for months on end, and can spend up to half of their time in the country in a given year. All of them live in a large house which also serves as their office. None of them have their family members with them in Ethiopia, as their permanent residence remains in China.

In addition to kinship networks, we found ample evidence of other kinds of networks in operation among Chinese migrants in Ethiopia. For instance, regional affiliations are a common factor in hiring practices, as migrants draw upon their hometown networks to find people to help them in their businesses. One case in point is the restaurateur Mr. Lu, all of whose Chinese staff come from his hometown of Shijiazhuang in Hebei province. Another case is the staff of the ATDC, all of whom are from Guangxi province except the two translators. A third example is the farmer Tao, who hired Chinese workers from his native province of Sichuan.

Another kind of network is that of present and former work colleagues. The majority of Chinese migrants come to Ethiopia with Chinese companies, and their social networks centre around people in the same company. This is especially true for those migrants who live in the same compounds as their colleagues, such as the staff of Sino Trust Investments mentioned above. For those migrants who came to Ethiopia with a company, and then branched out to do business on their own, former work colleagues become the customers who then bring their own network of contacts to the restaurant or shop. For instance, the Sichuanese entrepreneur Mr. Fu remains in close contact with former workmates in the aeronautics company, who also patronise his new restaurant.

Chinese migrants' networks are perpetuated partly 'by informal social capital in the form of shared social spaces' (Mohan and Kale 2007: 14) such as Chinese restaurants, markets, coffee shops, and karaoke bars. Chinese people in Addis often go to the Rwanda Market, and this market is a prime meeting place. As one Chinese restaurateur says, 'there are many Chinese people in this market, and when we meet other Chinese, we often ask where they are from...'³⁸ In markets like this one, regional origins often become the conversation starter by which connections are formed. In addition to physical spaces such as the Rwanda Market and Chinese restaurants, migrants also socialise and do business through virtual networks such as QQ and WeChat.

In terms of shared social and virtual spaces, Chinese migrant networks in the food and agriculture sector work in similar ways as other sectors. One key difference is that the widespread 'professionalisation of recruitment' through internet websites and employment agencies that Mohan et al. (2014: 79) found for professional staff in Chinese companies does not appear to be prevalent in the agriculture and food sector in Ethiopia. This is

likely due to the nature of the positions being recruited, rather than any conditions specific to Ethiopia. By and large, positions in farms, shops and restaurants are not professional positions, and recruitment takes place through personal networks. An obvious exception is the ATDC, where all the Chinese staff are professionals with degrees in their relevant areas of expertise who were recruited by the Guangxi Agricultural Bureau to work with the Bagui Company.

A final point on Chinese social networks is that they are more fluid in Ethiopia than they are inside China. This is a big advantage for ambitious people who come to Africa looking to climb the social ladder. As one Chinese entrepreneur put it, 'as much as possible I try to raise my level of social connections. For instance, if I am a millionaire, I will try to get to know those who are worth 10 million. If I have 10 million, I will try to get to know those worth 100 million. It's climbing the ladder like that ... because in this country, the good thing is that it is easier to get to know very wealthy people. In China, millionaires are forever at that level, and the same is true for those with 100,000 yuan, etc.'³⁹ What he meant by this last remark is that in China class lines are more clearly drawn, and people only socialise with those of similar means, whereas in Ethiopia social relations are more fluid because everyone is thrown together in the same Chinese diaspora community.

Unofficial business: Chinese migrants' interactions with the Chinese embassy

One variation on the theme of the relative fluidity of Chinese social networks in Ethiopia mentioned above is the informal contacts that many Chinese entrepreneurs have with Embassy staff. For instance, while one of the authors was talking to the manager of the Guangdong Hotel one day after lunch there, she received a call from a contact at the Embassy. Restaurant owners are particularly familiar with Embassy personnel, who often patronise their establishments. As one restaurant owner observed, 'Embassy people come here, so I know them. After all, we are all Chinese people. As Chinese, the Embassy are leaders and they are responsible for us, and the Embassy is concerned about what we are doing here, and hope that we are doing our business well...'⁴⁰ In this sense, if Chinese businesses are doing well and abiding by locals laws, it reflects well on the Embassy; if not, it reflects poorly upon them.

Given that it is a bilateral cooperation project between China and Ethiopia, one might expect that the ATDC would have frequent contact with the Chinese Embassy in Addis. The Chinese Ambassador did go to visit the ATDC during the Spring Festival of 2013, but according to ATDC staff, contact is otherwise infrequent. As one ATDC staff member put it, 'Embassy people don't often come here; they come occasionally to have a look, to

make sure things are on track. They are managers, so they will definitely come to have a look. The Chinese government has invested in this project, and so of course they want to see results.'

With the exception of the ATDC, Chinese farms and food businesses in Ethiopia appear to be operating outside the context of official bilateral cooperation. Even where they have contact with the Chinese Embassy, these businesses haven't gotten any direct assistance from the Chinese government, and must rely entirely on their own resources. This is likely a result of the small scale at which they are operating. As the owner of a Chinese restaurant explained, 'a small business like this one is hardly worth mentioning. For large scale investments, the government has to get involved. The government doesn't have the time to get involved in small scale enterprises – they don't have time, so business people have to rely solely on their own resources. Of course, in case of trouble, we have to go to the Embassy!'⁴⁴¹

While Chinese businesses in the food and agriculture sector appear not to have received any direct aid from the Chinese government, the presence of the Embassy does exercise some influence. As one key Chinese informant pointed out, 'imperceptibly, there is a kind of help. If there wasn't an Embassy, then your restaurant wouldn't be in a good position. Because of foreign policies ... relatively speaking, China is a big and strong country, and people outside may respect Chinese people more [for this reason], just like with America. Whether or not there is any help [from the Embassy], imperceptibly, there is a kind of influence...'⁴⁴²

Narratives of hope: Ethiopia as opportunity

Chinese migrants come to Ethiopia for the same reasons that they go to other African countries, and it all boils down to a push-pull dynamic centring on the opportunities the country has to offer coupled with the desire to escape certain things at home such as cutthroat business competition. The theme of 'Africa as opportunity' highlighted by Mohan et al. (2014) is as true of Ethiopia as anywhere else in Africa. For many migrants, Ethiopia offers them chances that do not exist back in China. As the vegetable shop owner Miss Tang put it: 'I have a lot of opportunities here. Maybe in a few years I can go to the UK, or to another country. I haven't thought of returning to China. If I returned, I would just have to find a job.'⁴⁴³ In her mid-twenties, she is already a successful entrepreneur in Ethiopia running her own business, whereas in China she would have to work for someone else.

A number of informants cited the many 'blank spaces' in the market waiting to be exploited, along with the fact that it doesn't require much capital to start a business in Ethiopia. The other side of the coin in this regard is tough competition back home. As the manager of the

Guangdong Hotel observed, 'in China it's very difficult to do business. The market there is already saturated.'⁴⁴⁴ This is a sentiment that we heard again and again. As another Chinese entrepreneur lamented, 'in China's domestic market, pressure is intense, and so [we] choose the foreign market. Because with Chinese, the ideas you have, have already been implemented by others. You can only choose those areas where you are stronger or more advanced than others, otherwise you will fail. Competition at home is too intense, and there's no shortage of hands because mechanisation has replaced human labour. The market is already saturated.'⁴⁴⁵

For some Chinese migrants in Ethiopia, it is simply a question of wanting to make money. As one entrepreneur put it, 'frankly speaking, I'm here to make money. [We] go wherever money can be made.'⁴⁴⁶ For those migrants with families, this is not simply for oneself, but rather to support one's family and improve their economic circumstances.

However, for many migrants it is not merely a question of making money. The theme of wanting to go out to improve oneself, to see the wider world, came up repeatedly in conversations with Chinese migrants, just as it has been noted by other studies of Chinese migrants in Africa (e.g. French 2014; Mohan et al. 2014). When asked what was in it for them to come here, several ATDC staff said it was about the opportunity to go outside China. In the words of an agronomist at the ATDC, 'the first reason [for going out] is that we've already been in China a long time. Second, we hope to go outside China to improve ourselves, and so sought an opportunity. It's rare to be able to go outside China with an opportunity of this kind. Some opportunities come by chance, not by seeking, you just happen upon them. It's not like you can go just because you want to.'⁴⁴⁷

While opportunities are what draw Chinese migrants, at the same time they don't see Ethiopia as a place where they can settle permanently. Not a single informant expressed the desire to remain in the country indefinitely, although some such as the restaurant owner Mr. Lu have been there for over ten years. According to one key informant, class plays a role in determining the length of time that Chinese migrants are willing to stay in the country. As he observed,

Most stay only for a short time; those who are here long term are few. There are some who are here for a longer time, but they tend to be people from poor backgrounds, for whom conditions in this country are better than those they had back home. For instance, take the case of Miss Peng [an employee in the restaurant he formerly managed]. Do you know where she is from? She is from an extremely poor mountainous region in Guizhou. In her eyes, things are good here, much better than her hometown! So these things depend on your background, on your experience. Take me, I'm in Beijing or wherever else, so why should I come here? This place can't even

compare to a suburb in Beijing, it can't even compare to Tongxian [a suburb in the far east of Beijing]!⁴⁸

The motivations for coming to Ethiopia are the same for Chinese migrants in the food and agriculture sector as for other sectors, and in fact similar to the reasons why Chinese migrants go to other African countries. What is different about Ethiopia is the fact that the livelihood strategies of Chinese migrants are shaped and constrained by the national regulatory context which reserves certain business opportunities for locals. One striking feature of Addis Ababa and other Ethiopian cities is the dearth of Chinese shops. While there are a couple in Addis, there are far fewer than in many other African countries, which in turn is related to the fact that restrictions on the operation of retail and wholesale trade by foreigners is enforced in Ethiopia, at least to some extent. This appears to be an exceptional situation in Africa. As Dobler (2005: 1) observes: 'diverse and variable as African cities are, a new common feature has emerged over the last ten years: in every larger African town, there's at least one China shop.' If circumstances allowed, the same would be true in Ethiopia. As several Chinese informants pointed out, many Chinese would open shops, malls and other retail businesses if they were permitted to do so, and so state regulations clearly exert a powerful impact on the options available to Chinese migrants in Ethiopia.

Conclusion

Chinese migrants in Ethiopia are the principal source of demand for certain non-traditional commodities such as pork, vegetables and tofu. Their involvement in the supply of these commodities is more limited, with some engagement in the farming and food retail sectors but far less than that of local entrepreneurs. Overall, Chinese are currently only marginal players in the food and agriculture sector in Ethiopia, and relatively few Chinese migrants are employed there. Far more are engaged in construction, road building, hydropower, electricity, railroads, telecommunications and manufacturing. This study could only locate three Chinese farms in the entire country. While there may well be others that escaped our investigation, the total number is almost certainly very small. These findings are consistent with those of Bräutigam and Tang (2012: v), who observed that 'Chinese farming investment is far smaller than generally believed,' in spite of longstanding Chinese engagement in agriculture and rural development in Ethiopia.

The food and agriculture sector is an interesting angle from which to observe the phenomenon of Chinese migrants, and is unusual in at least two respects. First, it is currently dominated by independent entrepreneurs rather than big companies, operating largely under the radar of official cooperation. Second, Chinese migrants tended to come to the country for other kinds of work, and got into this sector only later on after seeing the opportunities it offered. This is particularly true of those migrants operating restaurants and food shops.

This is not a story about SOEs and other large Chinese companies, because those firms are currently peripheral to agricultural supply chains in Ethiopia. Of course, that may well change in the near future, as discussed above. However, even though those large firms are not central to this story, they are nonetheless ever present in the background as the reason that many Chinese came to Ethiopia in the first place, and have been crucial in creating the demand for the foods that Chinese people prefer, which in turn has generated commercial opportunities for Chinese and Ethiopians in this sector. In fact, most of the demand for non-traditional commodities stimulated by the presence of Chinese migrants is being met by Ethiopians.

The Chinese are following in the wake of other migrants who have come through various means to the African continent, bringing new ideas and technology, shifting food tastes, creating demand for new commodities, establishing businesses and employing local people. This movement of people is mostly not state orchestrated, and varies by sector; in fact for the food and agriculture sector in Ethiopia, it is mostly occurring below the radar of official planning and cooperation. In the unfolding drama of China's expanding presence in Africa, one can plausibly argue that it is these unofficial contacts that are more significant for African development, simply because they are so much more numerous and far reaching than the official ones.

As this study has focused on Chinese migrants in the food and agriculture sector, it is worth considering what the implications are of their presence for Ethiopian development. The case of a locally run meat shop in the Rwanda Market illustrates the double edged nature of Chinese involvement in agricultural commodity chains from the perspective of local people. The owners of the shop complain about the rising competition from Chinese entrepreneurs, which is making business increasingly difficult to do; the fact that Chinese people prefer to buy from Chinese shops; the lack of legal licenses on the part of some Chinese meat and seafood vendors; and the common practice of going into business with a local person who obtains the necessary license even though the shop is Chinese owned and operated. As one of the owners of the shop stated emphatically, 'Chinese should not participate in some activities. If Chinese are selling vegetables and pork, then they will start to sell beef, sheep and goats. This should be a job for local people. Ethiopian people should not rent their license for Chinese – this is illegal here. We have a plan to restrict Chinese from selling produce according to the law.'⁴⁹

At the same time, the owners admit that most of their customers are Chinese, and that in fact the shop exists because of Chinese demand. In the words of a Chinese restaurant owner, the Rwanda Market 'would be finished' were Chinese ever to leave the country in large numbers. And the presence of Chinese customers has dramatically increased the variety of vegetables available in the markets of large cities such as the capital.

Chinese entrepreneurs also complain about restrictions on their activities – such as rules on business licenses – and about arbitrary visits from government inspectors to their shops who seek to augment their incomes through the assessment of fines.

The fact that the Ethiopian government does restrict the operation of retail and wholesale businesses by foreigners (though unevenly enforced) is testament to the fact that Ethiopia is a relatively strong state in terms of regulatory capacity. This is in line with Ethiopia's commitment to the 'developmental state' approach, whereby foreign investment and donor support are carefully channelled and controlled to meet the development objectives of the Ethiopian state (Alemu and Scoones 2013). The regulations on retail and wholesale business are not directed at Chinese investors specifically, but rather at carving out an exclusive space for domestic businesses in the context of expanding foreign investment in the country. However, they have the effect of channelling and restricting certain forms of Chinese investment, which in turn is impacting the manner in which commercial relations between Chinese and Ethiopians are unfolding. One could argue that strong state capacity, an abundance of local entrepreneurial talent, and the presence of regulations such as those on business licenses are all important in terms of ensuring that local people as well as Chinese investors are made better off by those commercial relations. While neither Chinese nor Ethiopian entrepreneurs are happy with the status quo, both are benefitting.

End Notes

- 1 Chinese employee of Ethiopian Embassy in Beijing, personal communication, March 20, 2014.
- 2 Chinese employee of the Chinese Embassy in Ethiopia, personal communication, December 20, 2014.
- 3 Large Chinese companies have garnered many contracts in Ethiopia for infrastructure, hydropower and other types of projects. These projects are funded through a variety of sources, such as Chinese government loans, loans from other countries and international organisations such as the World Bank, or by Ethiopian government resources
- 4 David Huang, the farmer mentioned in Bräutigam and Tang (2012: 15), has since returned to Shenyang with his family to work in a Chinese company there.
- 5 Delala is the Amharic word for middleman. Ethiopian delalas are frequently engaged by Chinese entrepreneurs to hire local staff, find housing and undertake myriad other tasks which require local connections.
- 6 Interview, ATDC staff, Ginchi, November 20, 2013.
- 7 Interview, Researcher, Ethiopian Institute of Agricultural Research, Addis Ababa, March 13, 2014.
- 8 Interview, Researcher, Ethiopian Institute of Agricultural Research, Addis Ababa, March 13, 2014.
- 9 Interview, Meat shop owner, Rwanda market, Addis Ababa, November 24, 2014.
- 10 Interview, Meat shop owner, Rwanda market, Addis Ababa, November 24, 2014.
- 11 Interview, Ethiopian meat vendor, Addis Ababa, March 17, 2014.
- 12 Interview, Ethiopian meat vendor, Addis Ababa, November 24, 2013.
- 13 In Ethiopia, 'fasting' refers to adherence to a vegetarian diet for roughly 150 days per year due to religious requirements.
- 14 Personal communication, Rwanda market vendor, Addis Ababa, November 26, 2013.
- 15 Interview, tofu vendor, Rwanda Market, Addis Ababa, March 15, 2014.
- 16 Personal communication, Rwanda Market vegetable salesman, Addis Ababa, Nov. 25, 2013.
- 17 Personal communication, Chinese state owned construction firm employee, Addis Ababa, Nov. 26, 2013.
- 18 Interview, former Chinese farm owner, Shenyang, China, August 31, 2014 (phone interview).
- 19 Interview, Chinese vegetable shop owner, Addis Ababa, March 20, 2014.
- 20 This figure was hotly disputed by several Ethiopian informants familiar with her shop, who contended she was vastly under-estimating her sales. 'She can sell 100,000 birr in a day!' they told us.
- 21 Interview, ATDC staff, Ginchi, December 11, 2014.
- 22 Interview, ATDC staff, Ginchi, December 11, 2014.
- 23 Interview, Chinese farmer, October 7, 2014.
- 24 Interview, Chinese farmer, October 7, 2014.
- 25 Interview, Chinese farmer, October 7, 2014.
- 26 Interview, Chinese restaurant owner, Addis Ababa, November 25, 2013.
- 27 This research only found one Chinese firm in the food and agriculture sector in Ethiopia which is exporting to China. This firm purchases sesame from Ethiopian suppliers, processes it in a facility in Addis Ababa and then exports the sesame to China. This firm does not have its own farm in Ethiopia, but instead relies entirely on local suppliers.
- 28 Interview, Chinese employee, CGC Overseas, Addis Ababa, December 12, 2014.
- 29 Interview, Chinese staff, Sino Trust Investments, December 8, 2014.

- 30 Interview, Chinese restaurant owner, Addis Ababa, December 7, 2014.
- 31 For instance, see Lu et al. (2015 forthcoming).
- 32 Interview, Chinese restaurant owner, Addis Ababa, November 23, 2013.
- 33 Ethiopian law allows for marriages based on contract such as this one, where assets are not divided evenly should the marriage dissolve.
- 34 Interview, Chinese restaurant owner, Addis Ababa, March 18, 2014.
- 35 Interview, Chinese restaurant owner, Addis Ababa, December 7, 2014.
- 36 Interview, Chinese restaurant owner, Addis Ababa, December 7, 2014.
- 37 Interview, Chinese businessman and former restaurant owner, Addis Ababa, December 6, 2014.
- 38 Interview, Chinese restaurant owner, Addis Ababa, December 7, 2014.
- 39 Interview, Chinese businessman and former restaurant owner, Addis Ababa, December 6, 2014.
- 40 Interview, Chinese restaurant owner, Addis Ababa, December 7, 2014.
- 41 Interview, Chinese restaurant owner, Addis Ababa, December 7, 2014.
- 42 Interview, Chinese businessman and former restaurant owner, Addis Ababa, December 6, 2014.
- 43 Interview, Chinese vegetable shop owner, Addis Ababa, December 12, 2014.
- 44 Personal communication, Chinese hotel manager, Addis Ababa, March 17, 2014.
- 45 Interview, Chinese restaurant owner, Addis Ababa, December 7, 2014.
- 46 Interview, Chinese businessman and former restaurant owner, Addis Ababa, December 6, 2014.
- 47 Interview, ATDC staff, Ginchi, December 11, 2014.
- 48 Interview, Chinese businessman and former restaurant owner, Addis Ababa, December 6, 2014.
- 49 Interview, Ethiopian meat vendor, Addis Ababa, March 12, 2014.
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Annex 1: Vegetables available in the Rwanda Market

English Name	Chinese Name	Local / traditional vegetables	Non-traditional / exotic vegetables
Bok choy	油菜		✓
Broccoli	西兰花		✓
Cabbage (2 varieties)	包菜	✓	✓
Carrot	红萝卜		✓
Cauliflower	菜花		✓
Celery	芹菜		✓
Chinese cabbage	大白菜		✓
Chinese lettuce	莴笋		✓
Chives	韭菜		✓
Choy sum	菜心		✓
Corn (sweet)	玉米		✓
Cucumber (Chinese)	黄瓜		✓
Cucumber (Western)	黄瓜		✓
Eggplant	茄子		✓
Garlic (2 varieties)	大蒜	✓	✓
Garlic sprouts	蒜苗		✓
Ginger	姜	✓	
Gourd	丝瓜		✓
Green bean	四季豆		✓
Green chili (2 varieties)	青辣椒		✓
Green onion	大葱		✓
Green vegetable	茼蒿		✓
Indian lettuce	油麦菜		✓
Kale		✓	
Lettuce (3 varieties)	生菜		✓
Mint	薄荷		✓
Mushroom	蘑菇		✓
Mustard greens	芥菜		✓
Onion	洋葱	✓	
Peppers (green)	青椒		✓
Peppers (red)	红辣椒		✓
Peppers (yellow)			✓
Potato	土豆	✓	
Pumpkin (2 varieties)	南瓜	✓	✓
Radish (white)	萝卜		✓
Red onion	洋葱		✓
Spinach	菠菜		✓
Sprouts	豆芽		✓
Sweet potato	红薯		✓
Swiss chard			✓
Taro	芋头		✓
Tomato (2 varieties)	西红柿	✓	✓
Zucchini (Chinese)	西葫芦		✓

Annex 2: Interviews conducted in Ethiopia and China

	Name	Affiliation	Date
1	Mr. Melaku	Ministry of Agriculture	Nov. 19, 2013
2	Mr. Tekabe	Ministry of Agriculture	Nov. 19, 2013
3	Staff	China-Ethiopia Agricultural Technology Demonstration Centre	Nov. 20, 2013
4	Staff	Alage Agricultural College	Nov. 21, 2013
5	Mr. Lu	Restaurant owner	Nov. 23, 2013
6	Mr. Amoudi	Meat shop owner	Nov. 24, 2013
7	Mr. Na	Businessman and former restaurant owner	Nov. 25, 2013
8	Miss Yu	Vegetable buyer for Chinese construction firm	Nov. 26, 2014
9	Official	Extension services	Nov. 27, 2013
10	Mr. Chen	Ministry of Agriculture	Nov. 27, 2013
11	Staff	Guangdong Hotel	Mar. 12, 2014
12	Mr. Abebe	Meat shop owner	Mar. 12, 2014
13	Mr. Beru	Researcher for Ethiopian Institute of Agricultural Research	Mar. 13, 2014
14	Mr. Fikre	Trade and Industry Office Worker, Debrezeit	Mar. 13, 2014
15	Staff	Alema Farms, Debrezeit	Mar. 13, 2014
16	Ms. Zhang	Entrepreneur	Mar. 15, 2014
17	Mr. Bekele	Co-owner of tofu shop	Mar. 15, 2014
18	Mr. Li	Restaurant manager	Mar. 16, 2014
19	Mr. Zhang	China Petroleum employee	Mar. 16, 2014
20	Mr. Amsalu	Hotel manager	Mar. 17, 2014
21	Mr. Amoudi	Meat shop owner	Mar. 17, 2014
22	Miss Peng	Business partner of Mr. Na	Mar. 17, 2014
23	Dawit Alemu	Ethiopian Institute of Agricultural Research	Mar. 18, 2014
24	Staff	Ethiopian Investment Agency	Mar. 18, 2014
25	Mr. Ashenafi	Ministry of Trade official	Mar. 18, 2014
26	Mr. Fu	Shop owner, Rwanda Market	Mar. 18, 2014
27	Mr. Li	Friend of Mr. Fu	Mar. 18, 2014
28	Mr. Kebede	Owner of dairy/pig farm	Mar. 19, 2014
29	Miss Tang	Owner of vegetable shop in Bole	Mar. 20, 2014
30	Vegetable salesmen	Owners of vegetable stalls in Gerji Bole vegetable market	Mar. 20, 2014
31	Huang Yuxiang (David Huang)	Former vegetable farmer in Ethiopia (phone interview)	Aug. 31, 2014
32	Tao	Owner of Chinese farm	Oct. 7, 2014
33	Mr. Peng	Cousin of vegetable shop owner in Bole	Dec. 5, 2014
34	Mr. Na	Businessman and former restaurant owner	Dec. 6, 2014
35	Mr. Li	Owner of hot pot restaurant	Dec. 7, 2014
36	Mr. Han and Mr. Meng	Sino Trust Investment Co.	Dec. 8, 2014
37	Mr. Girma	Consultant for Chinese and other foreigners	Dec. 9, 2014
38	Mr. Fu	Chinese investor (phone interview)	Dec. 10, 2014
39	Mr. Ni	Chinese investor (phone interview)	Dec. 10, 2014
40	ATDC staff	ATDC	Dec. 11, 2014
41	Miss Wang	Joy River Meat Co. (phone interview)	Dec. 12, 2014
42	Mr. Xue	CGC Overseas (phone interview)	Dec. 12, 2014
43	Mr. Zhao	Consultant/translator for Chinese firms (phone interview)	Dec. 12, 2014
44	Miss Tang	Owner of vegetable shop in Bole	Dec. 12, 2014
45	Miss Bao	Owner of sesame processing & export business, with a processing plant in Addis	Dec. 26, 2014

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