Future Agricultures

CBAA Working Paper

How is The Chinese "Going Out" Policy Having an Impact on Agriculture-Related Trade with Africa?

A Political and Economic Analysis of Sino-African Relations

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January 2016

- This paper was produced as part of the China and Brazil in African Agriculture (CBAA) Project work stream

China and Brazil in African Agriculture Working Paper Series

http://www.future-agricultures.org/research/cbaa/8031-china-brazil-paper-series

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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Abstract

The establishment of the 'Going Out' (GO) policy at the beginning of the twenty-first century has reshaped China's interactions with the world. Thanks to this strategy, private and state-owned companies have expanded their businesses overseas. This has largely involved Africa, which since the 1950s has always been very important to China's foreign strategies. The agricultural sector has been a central constant in this partnership, and since the launch of the GO policy agriculture-related trade has grown exponentially. This has led many external observers to wonder why China decided to increase its investments in African agriculture. This paper, by analysing the import and export of agricultural machinery, food and agricultural products, aims to study the consequences the establishment of the policy has had for Sino-African relations, and to understand the reasons behind China's increasing interest in Africa: is it to satisfy China's increasing food demand, or to help the African continent achieve its own food security?

摘要

“走出去”政策的确立在2000年代来，重塑中国对世界的交互。由于这一战略，私有和国有的公司开始扩大它们的海外商业。这大部分影响了非洲；自1950年代以来，非洲在中国的国际战略一直是重要得， 特别是农业部门在这个关系里不断受到中央的。从政策的确立的时候，农产品有关的贸易已扩展的，所以很多的西方媒体感到好奇为什么中国对非洲的农业增加的。这本文想分析农业机械，食品和农产品分析的进口出口，为了理解”走出去”政策的确立怎么影响了中非关系，和什么原因造成中国对非洲的兴趣越来越大：它想不想改进非洲的农业和粮食安全还是它想满足它增长食物的要求？

Acknowledgments

I would like to take the opportunity to thank everyone whose assistance and support have made this paper possible.

I am deeply indebted to Ian Scoones and Henry Tugendhat. Ian has always been available to help me even during his holidays, and without his invaluable support, input and feedback I would not have been able to make it through to the end. Additionally, he gave me the chance for my first publication, and I am really thankful for this opportunity. Henry has been fundamental to helping me figure out how to approach this fascinating project, and aided me during the first stages of this paper. Without his initial tips I probably would not have been able to write about this challenging topic.

Table of Contents

List of Figures

List of Abbreviations

GO	'Going Out'
FAO	Food and Agriculture Organization
FDI	Foreign Direct Investment
FOCAC	Forum on China-Africa Cooperation
GPE	Global Political Economy
IFDI	Inward Foreign Direct Investment
OECD	Organisation for Economic Co-operation and Development
OFDI	Outward Foreign Direct Investments
PRC	People's Republic of China
SME	Small-Medium Enterprise
SOE	State-Owned Enterprise
SSC	South-South Cooperation
WFP	World Food Programme
UNCTAD	United Nations Conference on Trade and Development

1. Introduction and Background

During the last forty years, China has experienced incredible growth – improving from being a seriously underdeveloped country, to one of the most powerful nations on earth. The People's Republic of China (PRC) was established in 1949, after decades of civil war and foreign invasions. For the first 30 years following a socialist planned economy, China was not able to take off and become as self-sufficient as its leaders wanted it to. Additionally, increasing inequalities, lack of food and economic insecurity made the population suffer for a long time. Due to these reasons, at the end of the 1970s, when Deng Xiaoping (邓小平) became China's leader, a number of fundamental changes were made. Thanks to Deng's economic and policy reforms, the country started a process that let it switch from being a government-led economy to a 'socialist' market one (Bräutigam 2009). Deng launched the Open Up' policy that had as its goals the attraction of foreign investors and the internationalization of the Chinese economy (Wei 1995). For this purpose, from the end of the 1970s to the beginning of the 2000s, Chinese leaders have focused their attention on the country's domestic growth. They wanted to ensure the nation's economic growth by offering flexible policies and tax incentives to foreign countries and companies through the establishment of Special Economic Zones (SEZs) along the Chinese coasts (Ross 2013). Moreover, the Chinese leadership was also looking at the adjustment of domestic problems. An example is the decrease of the poverty level from 84 percent in 1981 to 13 percent in 2008 (World Bank 2015), considered to be one of the greatest achievements in human development history.

However, this was only the beginning of China's astonishing economic growth. In this dissertation I am going to talk about the 'Going Out' (GO) policy (走出去战略), one of the main bricks on which China's recent economic power has been built. The paper focuses on the economic and political reasons behind its establishment, and the impact that this policy has had on the world, especially on trade in agricultural products with Africa. The GO policy was formalized during the 10th Five-Year Plan (2001–2005) (Nash 2012). Although China went through an internationalization process in the 1980s and 1990s, only a few state-owned enterprises (SOEs) were allowed to trade and conduct business abroad (Huang and Wilkes 2011). This is one of the reasons why, at the beginning of the 2000s, Chinese leaders decided to bring the economic strategies to the next level by stepping into the international market and reshaping China's foreign relations. However, policymakers were aware that Chinese companies were not competitive enough. Indeed, one of the economic reasons for the establishment of the policy was to encourage firms to engage with the global market and to expand their commerce and businesses overseas so as to increase their effectiveness. Additionally, due to decades of trade with foreign countries and export-driven policies, China had accumulated a huge amount of foreign exchange reserves that gave it a comparative advantage in relation to other countries, while ensuring the possibility of alleviating the fiscal pressure on the Renminbi (Maxxelli 2014). Moreover, the GO policy has also been fundamental because, through governmental incentives, small-medium enterprises (SMEs) and private entrepreneurs have had the possibility to broaden their businesses and be more present in the country's economic mechanism. On the other hand, among the political reasons for its creation there was China's will to contrast Western global hegemony.

From this moment China's international authority constantly increased. In the last fifteen years China has influenced and affected the global market, creating high competitiveness because of its cheap products and large availability of labour. In this way China has been able to trade in continents that were already under the developed countries' control, as was the case in Africa. Over the last 50 years China has had relations with this continent, initially based on mutual political and military support. However, from the establishment of the GO policy this engagement has evolved into something more concrete concerning bilateral relations and business agreements under the principles of South-South cooperation (SSC) (Chun 2013). China has strengthened its relations with all African countries that recognize the PRC in place of Taiwan, and over the years many investments in different sectors have been made. The extractive sector, infrastructure and services are some of the most important areas where China is investing in Africa, but one industry that has always been part of Beijing's strategies in the continent is agriculture. China's engagement with African agriculture has increased rapidly, especially after the establishment of the GO policy, leading many experts to wonder why this has happened. In the last few years Western media have started to depict this as a clear intention by the Asian government to exploit Africa's natural resources and lands (Bräutigam and Zhang 2013).

The aim of this dissertation is to analyse the impact that the creation of the GO policy has had on agriculture-related trade with Africa, looking especially at primary goods, food and agricultural equipment. The first part of the paper will include a literature review where theories of Global Political Economy (GPE) will be introduced as a way of understanding how the world has gone through major geopolitical and economic shifts in the last decades because of the new emerging economies. Additionally, I will analyse China's role in this process, and what consequences its increasing international importance, especially after the establishment of the GO policy, has brought to the rest of the world and particularly to Africa. After the literature review, the research methodology will be introduced. Next I will discuss the results of my analysis of trade statistics from the United Nations Conference on Trade and Development (UNCTAD), as well as more qualitative observations. The results section will be divided into a quantitative analysis of data and statistics, and qualitative research. I have created graphs and statistics of different indicators from scratch using UNCTAD's dataset in order to analyse China's impact on Africa's agriculture, and to understand whether China started to intensify the investments in this sector to feed its domestic market, or if this increase was mainly dictated by the will to help the continent's productivity. Finally, I will discuss what conclusions we can draw from the findings in order to have a clearer image of what has been the effect of China's GO policy on African agriculture and trade.

2. Literature Review

In this section, I am going to analyse in more detail the main reasons behind the establishment of the GO policy. Firstly, I am going to look at the new paradigm shift that has evolved in the last few years due to the increasing importance of the emerging economies. After that, I will explore what has been China's role and that of the GO policy in this evolution, especially toward SSC and Africa.

2.1 The New World Order

Before talking specifically about the GO policy, and how this has shaped China's foreign relations in the last few years, it is necessary to illustrate the background before the emergence of China as an economic power. The concept of Global or International Political Economy has been reshaped many times over the years. This field represents the interrelated study of international relations and economy, and among its goals it aims to analyse North-South relations, international trade and global policy (Timimi 2010; Gilpin and Gilpin 2001; Veseth 2001). This notion is often reorganized when an important event occurs, and especially according to what consequences it brings. In the twentieth century, starting from World War I and through the American Great Depression and World War II, the field has witnessed many changes. However, the end of the Cold War has caused the change that has been the closest to us. At the end of this conflict we have observed the shift from a bipolar world order, guided by the USSR and the US, to one that should have been characterised by multi-polarization. Despite this premise, with its newly gained power the US became the centre of a masked unipolar system surrounded by its closest allies including the EU, Australia, Japan and South Korea (Menotti 2014; Krauthammer 1990). This system stood undisputed through the 1990s but went through a change at the end of the decade that could bring about a new multi-polar international system (Varisco 2013). Indeed, starting from the end of the century, new emerging economies including Brazil, India and China gained global influence, which in turn changed the GPE order. The influence of these rising powers has been noticeable in the international market, but especially in relations among countries of the global South.

2.2 The Increasing Role of the Emerging Economies

In the global South, the African continent has always been fundamental for the developed countries, and since the colonization period it has been considered as the Western economies' backyard (Xiangjiang, 2015). Although the occupation of the continent ended almost everywhere around the 1960s, these countries have always had preferential access to Africa's natural resources and a major influence over its governments. However, in the last 15 years this has changed. The emergence of the BRIC countries (Brazil, Russia, India and China) at the beginning of the new millennium as new international actors has brought about a remodelling of the global order as it affected the African continent, trade routes, financial systems and the way aid was considered.

Until that moment, aid programmes in Africa's underdeveloped countries were based on financial investments with the attachment of political conditionalities and the isolation of those countries not able to create a safe and right governance system like Zimbabwe (Scoones et al. 2013). However, this kind of aid brought next to no development to Africa, and many aid-dependent countries are poorer now than before (Moghalu 2014). The rise of the BRICS (South Africa was added in 2010) brought a paradigm shift both in the way aid was contemplated and in the Western hegemony over the African continent. These emerging economies offered the possibility of SSC to gain a new momentum, and since then the movement has expanded more and more. This brought theoretical benefits for all the actors involved, and made SSC an accepted component of international development policy (Kakonge 2014). The increasing importance of SSC was also driven by the decreasing role at the end of the 1990s of traditional donors and Western countries; in this period donors from the Organisation for Economic Co-operation and Development's (OECD) Development Assistance Committee drastically reduced Foreign Direct Investment (FDI) to the global South from US$130bn in 1999 to US$82bn in 2003 (Chahoud 2007). In order to overcome this reduction, the South, and especially Africa, decided to start a stronger engagement with the other component of SSC, trying to find new paths toward development. This engagement has always been based on the following principles:

- Mutual benefit
- Exchange of knowledge
- Non-interference in domestic policy
- Respect for national sovereignty
- National ownership and independence
- Equality
- Non-conditionality (ECOSOC undated)

Each of these principles is at the base of the cooperation between developing countries. The differences between aid programmes of the old and new donors were discussed at the High Level Forum on Aid Effectiveness in Busan, South Korea in 2011. This forum highlighted the dissimilarities between these two ways, but it was not able to create a universal standard of aid. In fact, the different commitments of rising powers toward the least developed countries has brought the African nations to turn to them, not only as suppliers or investors but also as equal partners to emulate in development (Scoones et al. 2013). New emerging donors differ from the Western sources of aid because they stress the importance of 'win-win' situations, meaning that each of the actors involved gains something from the engagement with the other (Chichava et al. 2013). This point is especially important for Africa because traditional donors tend to give financial aid while exploiting the natural resources of the continent. This has partially changed with the new paradigm brought by the emerging economies. Indeed, even if they still take advantage of Africa's raw materials, these countries stress the importance of mutual benefit; they act by promoting the construction of infrastructure and services, or engaging with governments to create projects to benefit local economies. Another main difference between traditional and emerging donors is the term itself: while the former see themselves as superior, the latter want to play the role of partner in development, both at the same level and with things to learn from each other. However, it is also true that some of the most important developing countries like Brazil or China, despite their many domestic problems, often engage with underdeveloped nations as though they have nothing to learn from them, and as though they will give African partners more than they will receive (Kakonge 2014).

The increasing importance of the emerging economies has been noticed in finance and trade as well. Until the 2000s the main paradigm for business agreements was the North-South route, but at the beginning of the new millennium the South-South movement has grown exponentially. The increasing power of the rising economies has played an essential role to this extent and at the beginning of the 2000s South-South trade has expanded more rapidly than North-South, growing by 17.6 percent from 2000 to 2004 (Chahoud 2007).

Although some controversies persist over the role of the emerging economies in SSC, this system has helped many African countries' economies. Many of them used to face barriers in the international market, especially from Europe or the US, but in the framework of SSC special tariffs and tax breaks give them the possibility to develop their export within countries in the global South (Kakonge 2014). Because of these incentives, SSC has significantly increased throughout the majority of the sectors like the development of technologies, and in the last few years it has especially enhanced the participation of new actors by making agreements not only government-to-government, but also involving the private sector and civil society (OECD 2013). However, as previously mentioned, despite SSC's aim to put all of the developing countries involved on the same level, some clearly have more weight than others internationally, and this is the case with China. In the next section I am going to discuss how China's role has evolved in the last few years, and how the 'Going Out' policy has influenced its international relations and foreign affairs.

2.3 China's Evolving Role in the International Sphere

China is now the second largest economy in the world, and according to some predictions it could overcome the US and become the most powerful nation on Earth by 2050 (Ünay 2013). Even if the PRC has engaged internationally since its establishment in 1949 by starting to release aid to least developed countries, and especially from 1971 when it gained a seat on the UN Security Council, it is only from the 1990s that we can consider China to be an effective participant in the GPE system (Tieh 2004). From this period China started to be taken more into consideration as an international power by other developed nations, which for a long time have considered it as a pool of labours and a country in which to produce cheap goods. However, just like the other emerging economies, China gained power toward the end of the century, and has led the revolution of the GPE order.

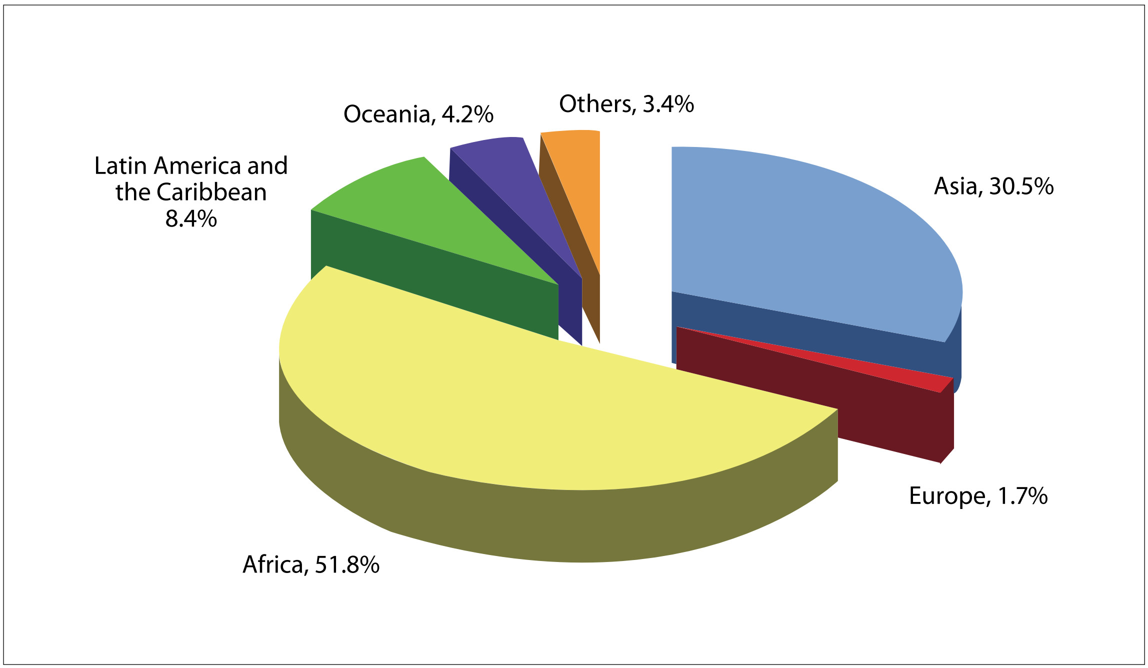
Although China, because of its many domestic problems, is still considered to be a developing country (Bernasconi-Osterwalder et al. 2013), its commitment toward the least developed nations has always been considerable. China has a longer tradition as a donor than as a receiver of aid (OECD 2012), and its aid programmes are still based on the 'Eight Principles' established by Zhou Enlai (周恩来) during his visit in Africa in 1964. That visit was a key milestone, and signalled the will of China to create development relations to contrast Western hegemony (MFA 2014). These values include the principles of equality and mutual benefit, and the possibility to provide economic aid in the form of free or low interests loans (OECD 2012). Additionally, China's aid programmes have also been based on the construction of infrastructure and services, on the productive sector and on preferential trade agreements, following the principle of 'Aid for Trade' (OECD 2012). More recently China has adjusted its aid to include new actors and has become part of triangular cooperation with international organisations and OECD donors (ECOSOC 2008). Thanks to these adjustments, China's engagement in SSC has increased to make it the largest aid donor.

The changes of China's international role in the last decade and its increasing economic power are to be mainly attributed to the establishment of the GO policy. This strategy has modified both the way Chinese leaders started to interact with the rest of the world and the way in which other countries started to consider China. One of the GO policy goals was to enforce China's international role, taking advantage of the enormous economic power accumulated during the previous decades, and to increase this power by encouraging companies to expand their businesses overseas. This policy has changed China's trade and business strategies, and has brought it to pursue a shift from being mainly an importer of capitals and exporter of goods, to being one of the most important exporters of capital (Nash 2012). From the launch of this strategy China's commitment toward least developed countries has further increased, and examples could be found in 2000 and in 2011. The former is the year in which, during the UN meeting for the establishment of the Millennium Development Goals (MDGs), premier Wen Jiabao encouraged leaders of developed countries to help nations with economic and human problems to solve their economic issues. The latter represents the publication of a White Paper in which China stated that it would help 161 countries in economic difficulties and give debt relief to 50 nations (Shih 2013). The two continents that were most affected by this decision were Asia and Africa. These two regions are home to most of the world's population, as well as most of the poor. Africa in particular has always been central to China's international strategies, in part because the common development challenges faced made it easier for them to build a true partnership based on equality. However, this importance has increased over the years, and for this reason in the next section I am going to show the different phases and actors involved in this relationship, and their evolution starting from the beginning of the 2000s.

2.4 China's Engagement with Africa

When China began to have political discordances with the Soviet Union in the mid-1950s, it started to look for new allies. However, because of different political systems it could not turn to the West, so it decided to turn to the South and start collaborating with other less developed nations. China has always had tight relations with Africa. After the Bandung conference in 1955 and with the creation of the Third World (Ukaejiofo 2014), China officially started to engage with this continent, and the first country with which it had contacts was Egypt in 1956 (Elshehawy et al. 2014). At first, due to its recent establishment, China's desire was to create international and political consolidation, and in order to gain consensus it started to help African countries in their fight for independence. Initial relations were then based on aid, military and political support, but over time these have evolved as a consequence of China's economic and political changes. For all of these reasons, Africa has been perpetually important in China's international strategies,

Figure 1

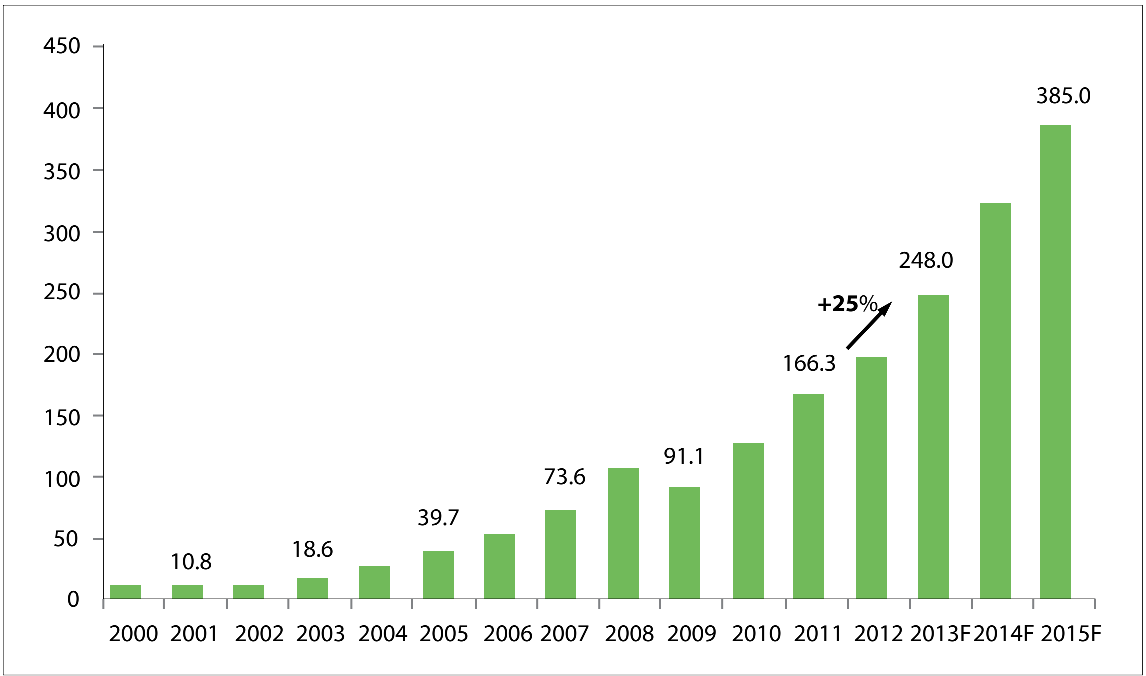


Source: White Paper on China's Foreign Aid, Issued by China's Information Office of the State Council on July 10 2014 and as a consequence it has always figured heavily in China's distribution of foreign aid.

Sino-African relations evolved from being diplomatic and aid-based to having a stronger business emphasis based on the SSC principles of mutual benefit, shared knowledge and respect for national sovereignty (UNOSSC 2015). The first important project developed by China in Africa was the Tanzania-Zambia Railway (TAZARA) in the 1960s. From that moment investments started to increase in number, but the majority were on a small to medium scale. However, from the turn of the new millennium, China's relations with Africa gained a new momentum. At the beginning of the 2000s, the establishment of the GO policy and the creation of the Forum for China-Africa Cooperation (FOCAC) in 2000 (Buckley 2013) helped this partnership to grow under all points of view. The launch of the GO policy and of the FOCAC in the same period showed the will of Chinese leaders to step with much more energy into the international scene by making explicit and stronger ties with important and strategic actors.

From the political point of view, the GO strategy became important because China officially entered into Western countries' backyard, arguing that it had more rights to be Africa's ally against the old colonizers and traditional powers (Ayodele and Sotola 2014). From the economic point of view, Sino-African trade has had an astonishing growth since 2000, going from a few billion dollars in 1995 to more than US$200bn in 2013 (see Figure 2). The GO policy encouraged Chinese companies to use their competitive advantages to overcome their opponents in the global market (Bernasconi-Osterwalder et al. 2013), and many African countries have welcomed China's increasing international role because they consider it to be a partner in development. They prefer to trade, make agreements and receive investments by Chinese companies because of the lack of political strings attached to those, in addition to the possibility of avoiding the endless bureaucracy that traditional donors enforce (Roopanarine 2013). Thanks to this push, and the openness by the majority of the African nations, in the last few years China has started to diversify and intensify its investments in Africa in order to include different sectors.

Figure 2



Source: Foxman, 2013

Agriculture is one of the main sectors in which China is more willing to invest. The primary sector has always been essential for China, and despite its small availability of arable lands (7 percent of the world's total) and increasing population (20 percent of the world's total) (Rubinstein 2009), the country has been able to make the most of it and create a solid base for its economic growth. For this reason, China's experience in land management and ability to increase productivity even with few resources have led many external actors to think that the exportation of Chinese methods could solve Africa's agricultural problems. International organisations like the UN Food and Agriculture Programme (FAO) and World Food Programme (WFP) have continuously encouraged Chinese engagement in African agriculture as a way to reduce poverty and increase food security and livelihoods (Shih 2013). Over the years, in order to improve agricultural outcomes, different actors have started to make investments in this sector, and nowadays there are three main categories:

- *Agricultural aid projects and creation of infrastructure:* These have always been part of

China's engagement in Africa. This category has constantly evolved, especially after the FOCAC meeting in 2006 where agriculture and food production started to be considered as top priorities.

- *Investments by SOEs:* Present mainly since the 1990s, these now include full-scale FDI.
- *Investments by SMEs:* This category has gained importance, especially after the establishment of the GO policy, because it gave more freedom to private SMEs to trade overseas. They focus on the domestic market of the country where they settle (Steele 2014).

On the other hand, China's increasing presence in the African continent and market has created worldwide curiosity, and even if Chinese investments in agriculture are modest compared to those of other countries, they have drawn many people's attention. Experts and media, especially from Western countries, have argued without evidence that the Chinese presence in Africa was mainly dictated by its own interests. Some of the main accusations were of exploitation of natural resources; the possible consolidation of a new form of colonialism; and an ongoing land grab in order to increase food production and satisfy China's domestic market (Bräutigam and Zhang 2013; Vidal 2012). However, none of these claims can be considered completely correct. First of all, it is undoubtedly true that China is trading with African countries rich in natural resources in order to feed its growing economy, but they are doing so under the SSC principle of mutual benefit. Moreover, as the paper shows in section 4.2, China is exploiting its raw materials to a lesser extent compared to other countries. Second of all, colonialism is about political, military and economic control over another nation, and China is not doing any of these things (Watts 2013). Lastly, we still cannot talk of land grabs because not all such projects are able to become sustainable and many fail. Additionally, to be considered as such, according to FAO, a project must be over 50,000ha, while Chinese companies operate on a medium scale, usually reaching 1,000ha (Cotula et al. 2009). Despite these accusations, Chinese leaders refuse to be internationally represented under this light. For this reason they have repeatedly stated that Africa's food security is one of China's main points within assistance programmes to Africa (Li 2012). Meanwhile they have adjusted their engagement with African countries, increasing the productivity of local agriculture in order to improve the outcome for the African domestic market.

In this chapter we have seen how the world has shifted in the last decades, bringing new emerging economies to the core of attention. One of the leading emerging powers is China. Its international role has changed during these years, and its increasing importance has influenced not only its economic growth, but also the growth of the whole SSC movement. As a reflection of this, it is also having an important impact on the African continent. Over the years Sino-African relations have improved, going from political support to include recently trade, business and investments. Especially thanks to the establishment of the GO policy and the FOCAC meeting these relations have gained a new momentum. The GO strategy has been fundamental in order to push trade and business to the next level, and in the following sections I am going to analyse how this policy is having an impact on agriculture-related trade with Africa.

3. Research Methodology

In order to explain how the Chinese GO policy is having an impact on agriculture-related trade between China and Africa, I have used a mixed method incorporating quantitative and qualitative data. I have created graphs and statistics from scratch using UNCTAD as the main dataset, as well as official statistics from the Chinese Ministry of Commerce (MOFCOM). I have decided to use the UNCTAD dataset because it collects data from national and international sources, providing a wide range of indicators over an extended period of time. The years that I have analysed are those from 1995 to 2013/14, by which I have been able to approach the analysis from the period just before the establishment of the GO policy and through its changes over time. I have made graphs and collected data for infrastructure, machinery, primary agricultural products and food looking at both export and import (where possible). In this way I have been able to show whether or not China's impact on the African primary sector has changed from the creation of this policy. Additionally, especially with the section on food import and export, I have studied China's reasons behind its increasing investments in the continent. However, this dataset presents some limitations as well. It has some gaps both for specific years, and for the non-availability of data in particular sectors. Moreover, since I am going to talk about China, these statistics may not be totally accurate due to the difficulties in extracting information from the Chinese government. Furthermore, I have also taken into consideration articles, policy briefs and reports from international organisations in order to have an external point of view on important issues such as the accusation of land grabs, and to understand how the Chinese presence in Africa is perceived by local and foreign investors.

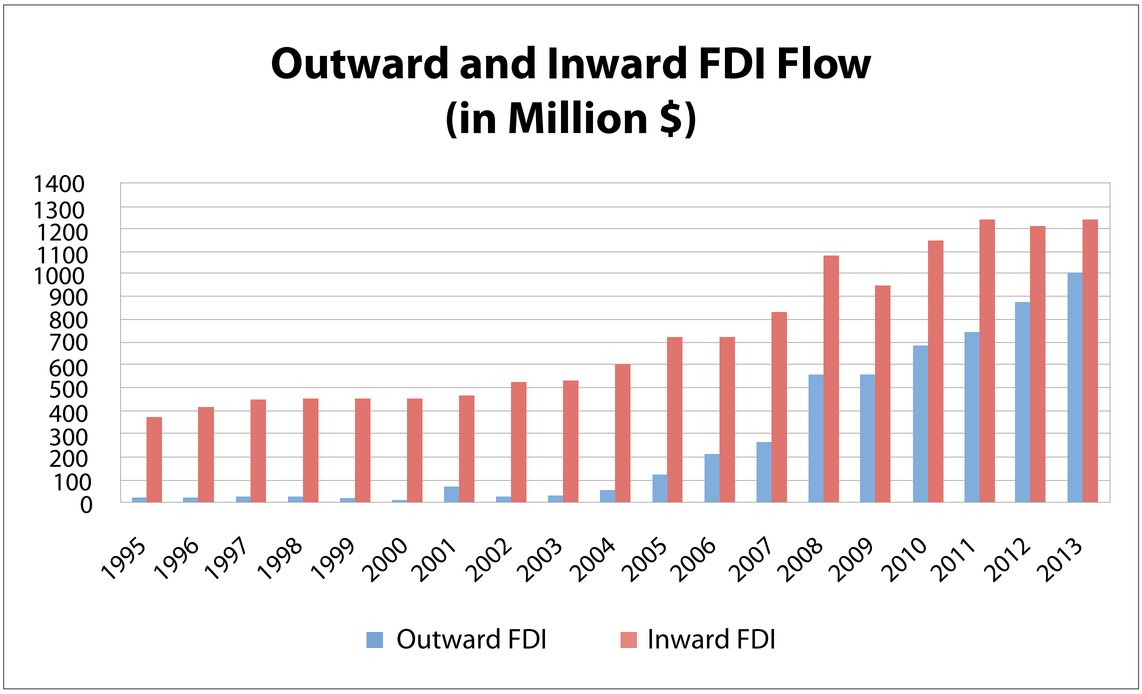
4. Results: How did China's GO Policy Affect Trade with Africa, and What Impact did it have on Agriculture?

Before looking at how the GO policy is having an impact on the African agricultural sector, I have first analysed how China's role in the international market has evolved since the creation of this strategy. In the first section, I am going to describe and study how the establishment of this plan has influenced China's international behaviour and operative system. To do this, I focus on a comparison between the evolution of the trend of China's Inward Foreign Direct Investments (IFDI) and Outward Foreign Direct Investments (OFDI) during the last decades. I also examine the development of China's import and export of goods and services in the same period. Gradually, the analysis has been narrowed down. The second part of this section is in fact based on specific details of Sino-African business and trade, looking at the main sectors involved in this relation. In this way I am able to show the increasing importance that Africa has gained over the years. The last paragraph is focused entirely on the agricultural sector. I have analysed the export and import of agriculture-related machinery, specific products and food, and how the establishment of the GO policy has affected these trades. Finally, the trade with specific African regions has been taken into consideration in order to show which are the most important areas for China's business, and especially which are the top partners in relation to these products.

4.1 China's Interaction with the International Market

Since its establishment, the PRC has always been treated with diffidence by the rest of the world. It took almost thirty years for China to be recognized with near unanimity, and still today there are some countries that prefer to have a formal relationship with Taiwan instead. As previously mentioned, the first signs of China's international engagement began in the 1970s, and since then Beijing has progressively opened its market to foreign countries. From that moment, it went through a thirty-year-long transition period, after which its international behaviour completely shifted at the end of 1990s, when the GO policy was proposed, and especially when it was officially recognized in 2001. For

Figure 3

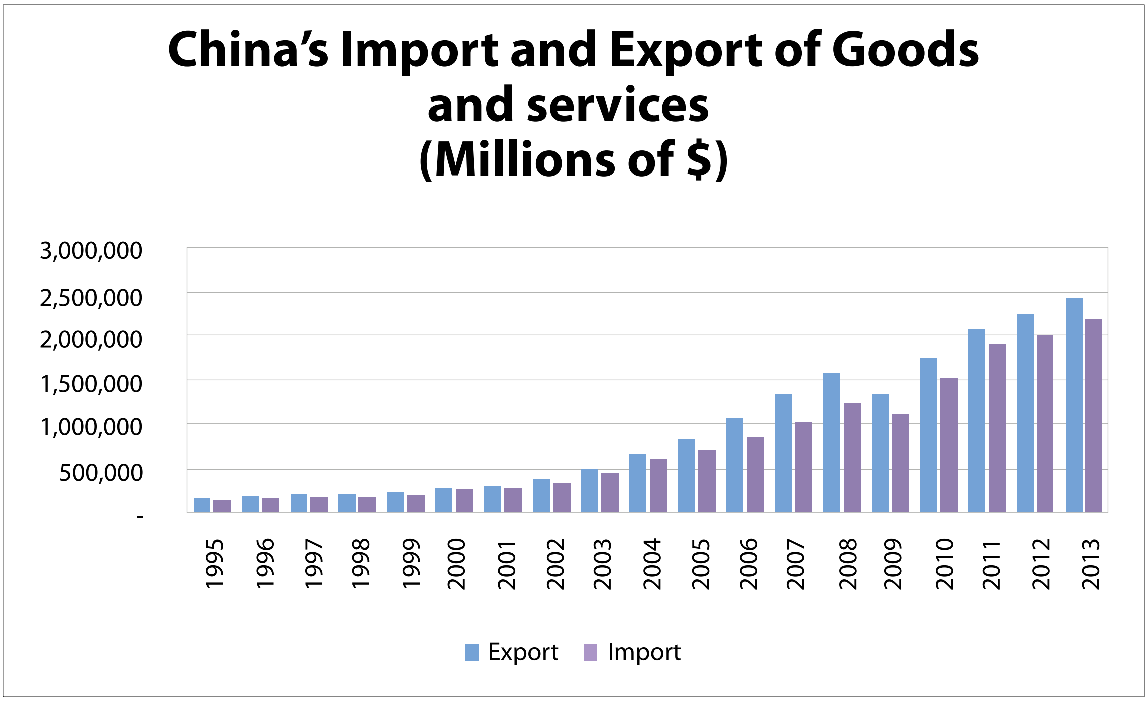


Source: UNCTAD, 2015

this reason, from the graph in figure 1, a change in trend starting right at the turn of the new millennium can be noted.

From this chart, despite a noticeable discrepancy between IFDI and OFDI, starting from the 2000s this gap began to diminish. China is still receiving foreign aid from both international organisations and other countries, but as evident from the graph, the level of IFDI is slowing down. On the other hand, despite its many domestic issues, China is one of the nations with the highest level of OFDI in the world (Ng 2015). The astonishing increase of OFDI, especially in the years 2004–2013, is attributed to the effects that the GO policy has had. In this period, China's overseas investments increased at an average of 14.1 percent a year, compared to the IFDI that has had a growth of 1.7 percent a year (Zhou and Leung 2015).

Figure 4



Source: UNCTAD, 2015

Going more into the specific, in figure 2 we can find a representation of China's import and export of goods and services.

Due to the fact that the international market was not considered to be the priority for the country's economic growth, China's level of import and export in this category before the year 2000 was really low. However, this graph shows that at the beginning of the new millennium both indicators started to increase rapidly, reaching very impressive levels. Additionally, the export power has surpassed the import one, underlying China's will to play an important role internationally. The only period of recession was during 2008–2009, probably as a result of the financial crisis.

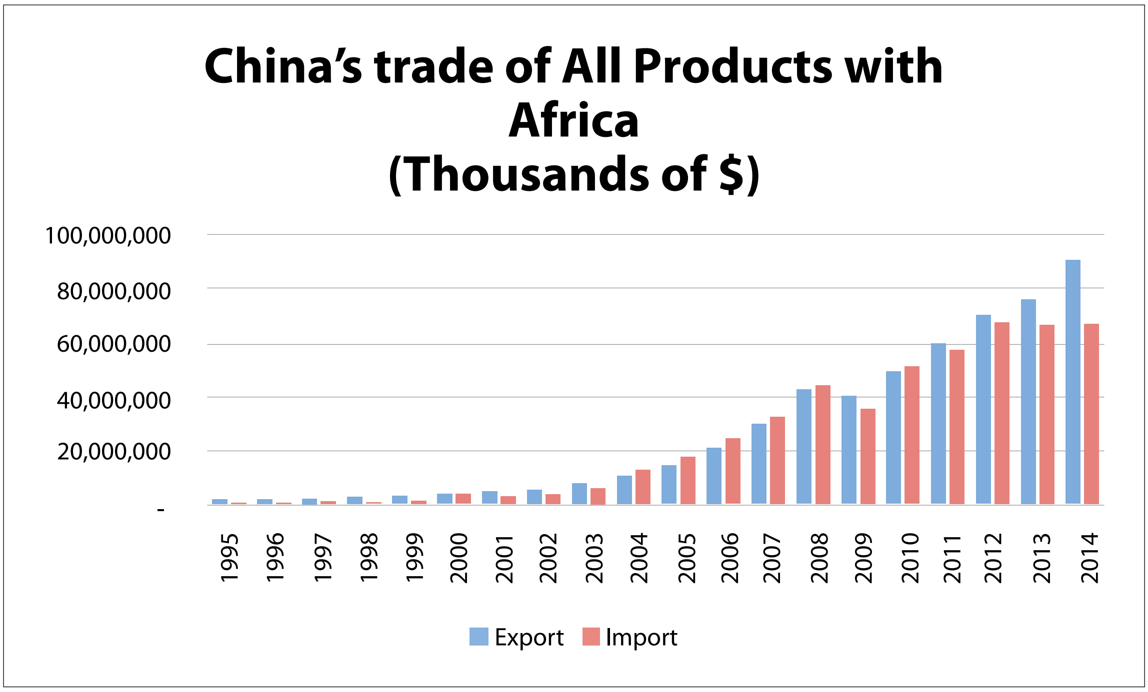
From these two graphs, it seems clear that the GO policy, by pushing Chinese SOEs and private investors abroad, has had a fundamental role in China's increasing international importance. However, the massive increase during the last decade has brought China to the core of attention. Since the PRC has increased its power in almost every market, Western experts and media have started a denigration process toward the Chinese government and companies. They have heavily criticised China's increasing international weigh, and especially its growing engagement with Africa, arguing that its intentions are not as good as its leaders claim. Therefore, in the next section I am going to analyse China's engagement in Africa to understand if, after the establishment of the GO policy, Sino-African relations have changed or not, and in what ways.

4.2 China's Trade with Africa

As previously mentioned, some of the reasons why China decided to deepen its relations with Africa were the need to expend its market, to broaden its business horizon and to compete internationally with the most developed economies. For these reasons, China tried to diversify its investments in Africa, including as many industries as possible. From the Chinese point of view, this was also considered a way to help African countries to ameliorate their own economies by developing their companies and industries, exporting new technologies and improving the productivity level thanks to the construction of new infrastructure. This increasing engagement brought China to overtake the US in 2009 as Africa's largest trading partner (Weng 2015), but despite these positive prospects, China's rising presence in Africa has been perceived in different ways. From one side, governments and the elite welcomed Chinese investments because of the increasing amount of capitals and business opportunities that they brought. On the contrary, part of the local population, in addition to the Western countries, perceived China's interests as a new form of colonialism, and saw the intensification of investments as a way to exploit Africa's natural resources in order to feed China's growing economy (Rossouw et al. 2014).

From the graph in figure 3 we can understand that, despite the many criticisms and attempts to denigrate the motivations behind Chinese investments in Africa, these have steadily increased.

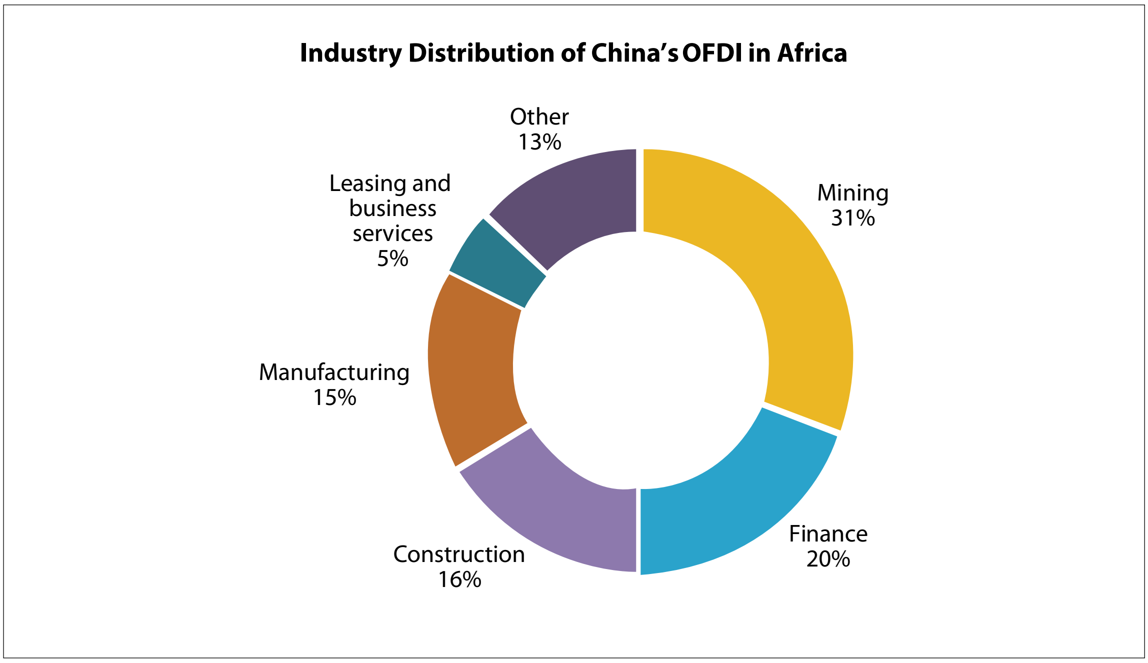
Figure 5



Source: UNCTAD, 2015

This shows the total products flow from China to Africa and vice versa. The huge growth registered from the beginning of the 2000s is to be attributed to the GO policy, and from this data we see the increasing importance that the African market has gained in China's business strategies. From those years we can notice a continual increase, and most importantly the export of products started to outperform the import level in 2011, reaching US$90bn in 2014 against less than US$60bn. Although these data are significant in order to understand the importance of the African continent for China's international strategies, it is also important to look at what are the main sectors involved in this process. From the graph below, we can see in percentages how the different sectors are involved in Sino-African relations.

Figure 6



Source: Zhou and Leung, China's Overseas Investments, Explained in 10 Graphics

From this chart we can see how important the mining sector, and more broadly the extractive industry, is for China. Natural resources such as oil and minerals are essential for Chinese companies to keep the competitiveness level as high as possible, and to satisfy the always-growing domestic requests. Looking at these statistics, it could seem clear that China is exploiting Africa's resources, but if we compare them to the United States for example, China is in fact grasping Africa's natural resources to a lesser extent. In 2009 only 29 percent of China's investment went to mining, compared to 56 percent of investment from the US in 2010 (Chun 2013). However, the data on distribution and on the total value of OFDI are not totally reliable and these could actually be even higher. Indeed, it often happens that Chinese companies send money to their subsidiaries in Hong Kong or other tax heavens to then re-direct the capital to other countries. If the funds are sent to a nation and then re-directed, this is considered to be an OFDI toward the first one. This is the reason why Hong Kong accounts for 68 percent of China's OFDI (Zhou and Leung 2015).

However, among the 13 percent of 'Others' in the previous chart, there is a sector in which China has always invested: agriculture. In the next section I am going to analyse the improvement that Sino- African relations went through in this area in the last two decades, exploring what have been the consequences that the GO policy has brought to them.

4.3 China's Engagement with African Agriculture

China's political and economic engagements in Africa have improved in recent years. Since the establishment of the FOCAC meeting and particularly after the 2006 meeting in Beijing, agriculture has become even more significant in this respect. Additionally, to show the increasing importance that this sector has for China, according to the 2010 Statistical Bulletin of OFDI China's stock in agriculture for the years 2005–2010 quadrupled, and increased virtually as much as the mining sector (Steele 2014). In this section I am going to analyse specifically China's interaction with African agriculture, and additionally I will try to answer some questions: Are Chinese investments in agriculture significant for Africa? What is the driver behind these investments? Is China seeking to satisfy its increasing demand for food security?

4.3.1 Investment in Infrastructure

Rising African agricultural productivity has always been one of the main reasons behind China's engagement with this continent (Alden 2013). Nevertheless, as previously argued, China began to have a clear impact on African development since the 1960s with the construction of the TAZARA railway. Chinese investors consider essential the creation of the right infrastructure to implement the connections between countries. That is why, especially from the establishment of the GO policy, China's efforts to ameliorate Africa's market and infrastructure have grown. We can see an example of this in figure 5.

Figure 7

Source: UNCTAD, 2015

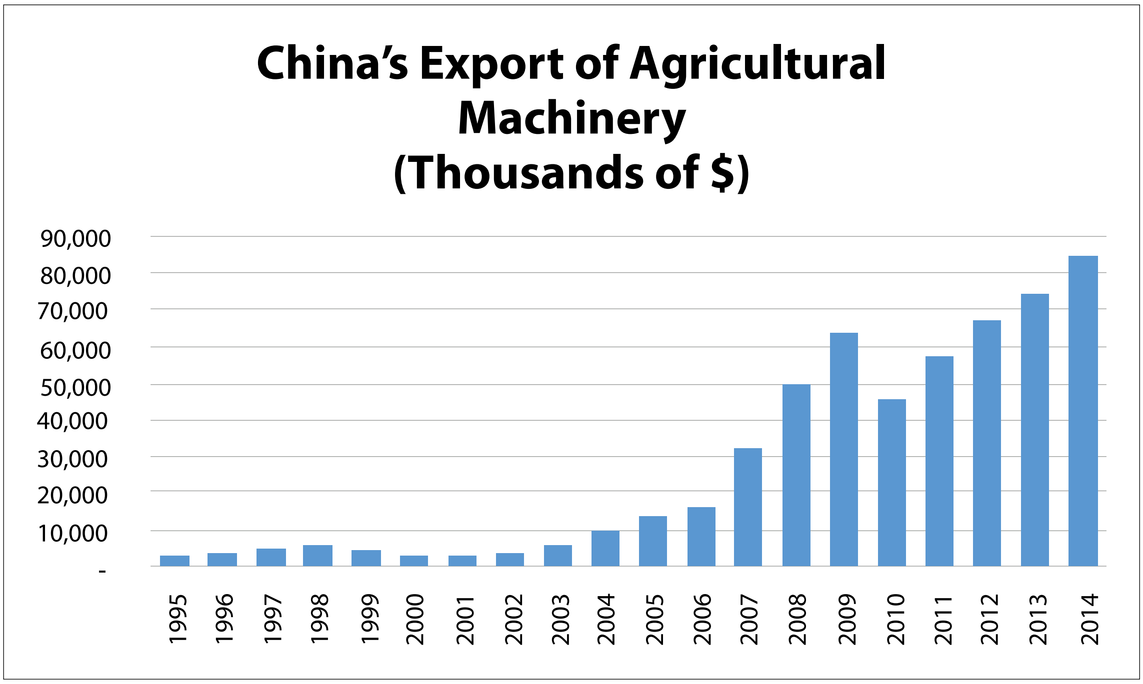
This graph shows many ups and downs with a jump in 2012, and a further increase in 2014. This irregular trend could be explained by the problems that Chinese entrepreneurs sometimes face with the local bureaucracy, especially caused by governmental instability in many countries. However, China's infrastructure projects have been considered a solid first step to then spread the efforts to other fields, because a better and faster transportation system will not only benefit people's daily lives, but will inevitably affect other trades and businesses as well.

4.3.2 *Investment in Machinery*

Chinese impact in the African primary sector is very well perceived in the trade of machinery, and especially since the establishment of the GO policy, when many Chinese firms have started to be involved in the export of agricultural apparatuses in order to increase African countries' agriculture productivity.

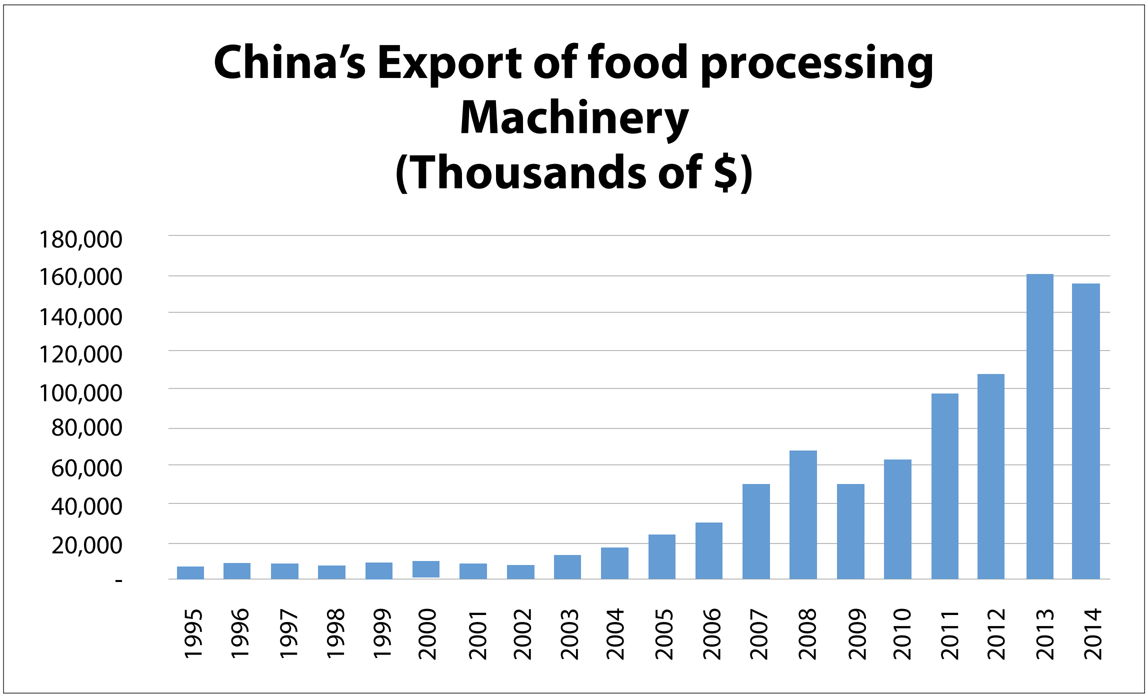
Thanks to this analysis we can denote the impact that China is having on agricultural productivity in Africa.

Figure 8



Source: UNCTAD, 2015

Figure 9

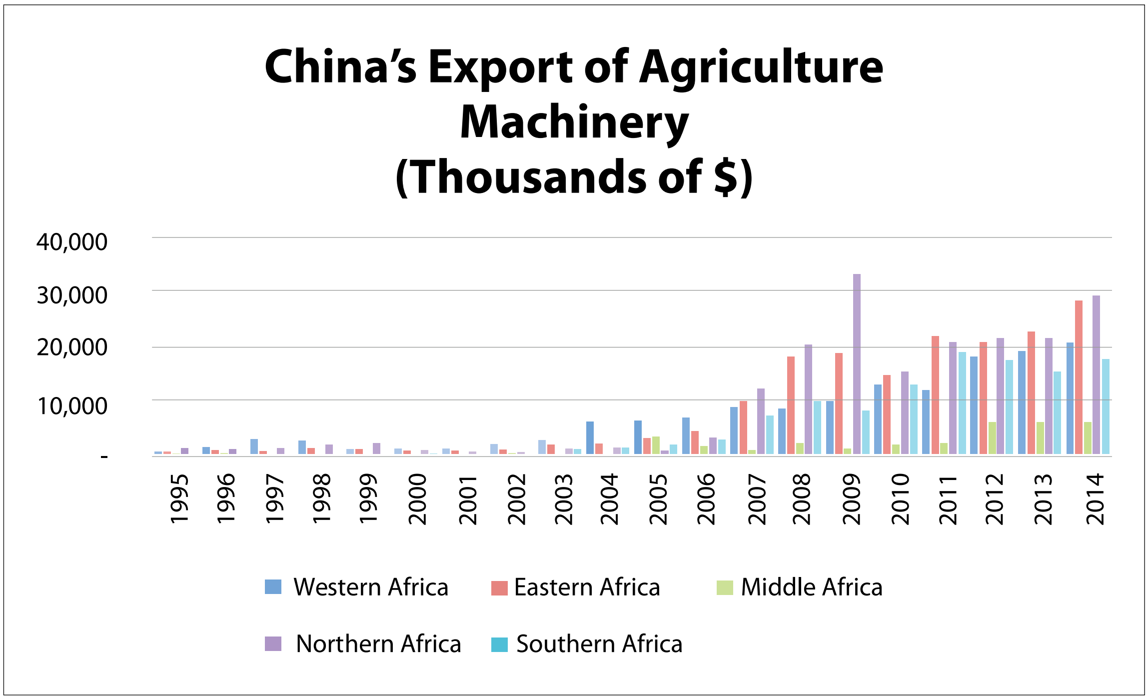


Source: UNCTAD, 2015

From these two specific graphs we can understand how China's behaviour and commitment toward African agriculture has increased over the last 20 years. In both the charts, from the years immediately after the creation of the policy, a steady increase in this trade began. Although these could be considered good points to show the influence that China is having on the development of African agriculture, there are still people arguing that Beijing has started businesses just with those countries rich in natural resources that could guarantee precious materials in exchange. However, this accusation does not seem to be completely accurate because there are documented cases in which China is investing in countries that offer other kind of resources, like Mauritius (Bräutigam 2009). To further disprove this belief, in the next section the analysis has been further narrowed down with the study of regional differences in export from China to Africa, indicating the top beneficiary regions and countries in China's business and trade for agriculture. I am going to analyse the same two charts in tables 6 and 7, but this time dividing them according to the five African regions: Western, Eastern, Middle, Northern and Southern. Additionally, other products such as tobacco and cotton will be taken into consideration in comparing Chinese imports and exports.

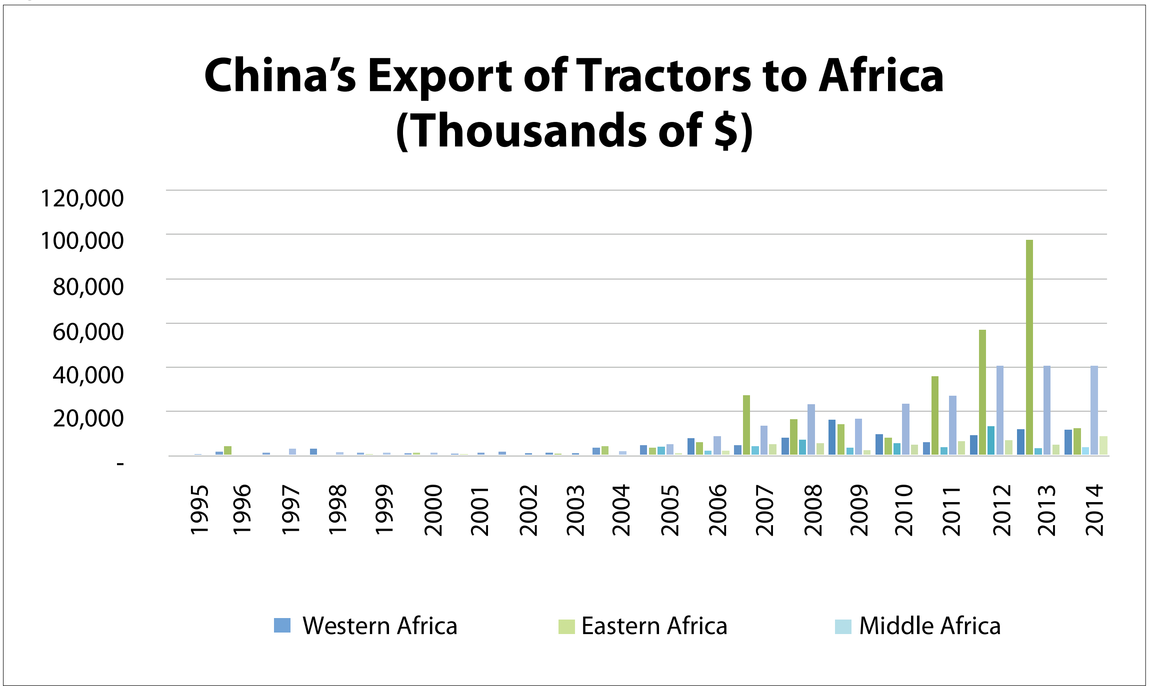
The two graphs below show the export of Chinese agriculture machinery, specifically tractors, to the five regions mentioned above.

Figure 10



Source: UNCTAD, 2015

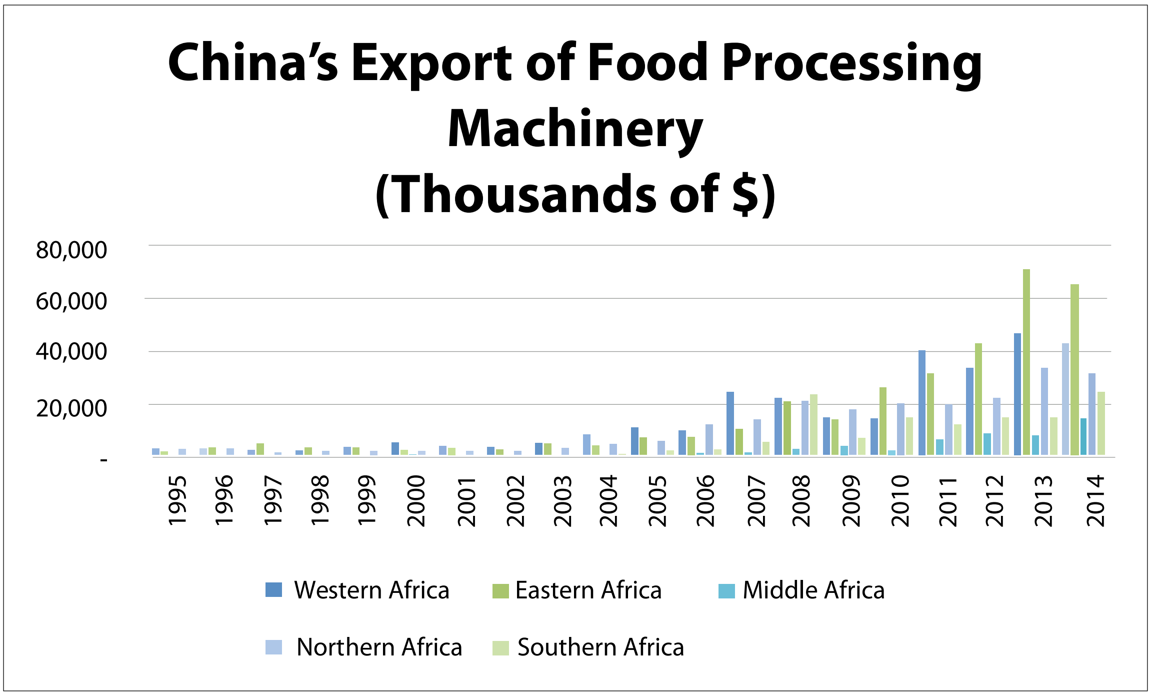
Figure 11



Source: UNCTAD, 2015

These two charts present many similarities: in both cases we can notice a slow growth until the years 2004 and 2005. Agriculture was officially incorporated into the GO policy in 2005, when the Ministry of Finance granted special funds to agro-enterprises to promote overseas investments. However, the real increase of Chinese exports in this particular trade started from 2007 and 2008, when the Ministry of Agriculture signed different agreements with both the Export-Import Bank (EXIM Bank) and China Development Bank (CDB) to promote investments using special loans and incentives (Bräutigam and Zhang 2013). The will to push investments during these years is probably a consequence of the financial crisis faced by the Western countries, which allowed China to strengthen its position in Africa. Another similarity is that in both the graphs, Middle Africa is almost nonexistent, and the levels of exports to that region are very low. On the other hand, these figures present Northern Africa as the most important receiver of agricultural machinery; in fact, in 2014 China exported triple the number of tractors to that region compared to the others. Lastly, it is important to note that from 1995–2005, China considered the countries in Western Africa to be important business partners, while starting from 2006 it switched its attention toward Eastern Africa, which in 2014 was the second largest receiver of both agricultural machinery and tractors.

Figure 12



Source: UNCTAD, 2015

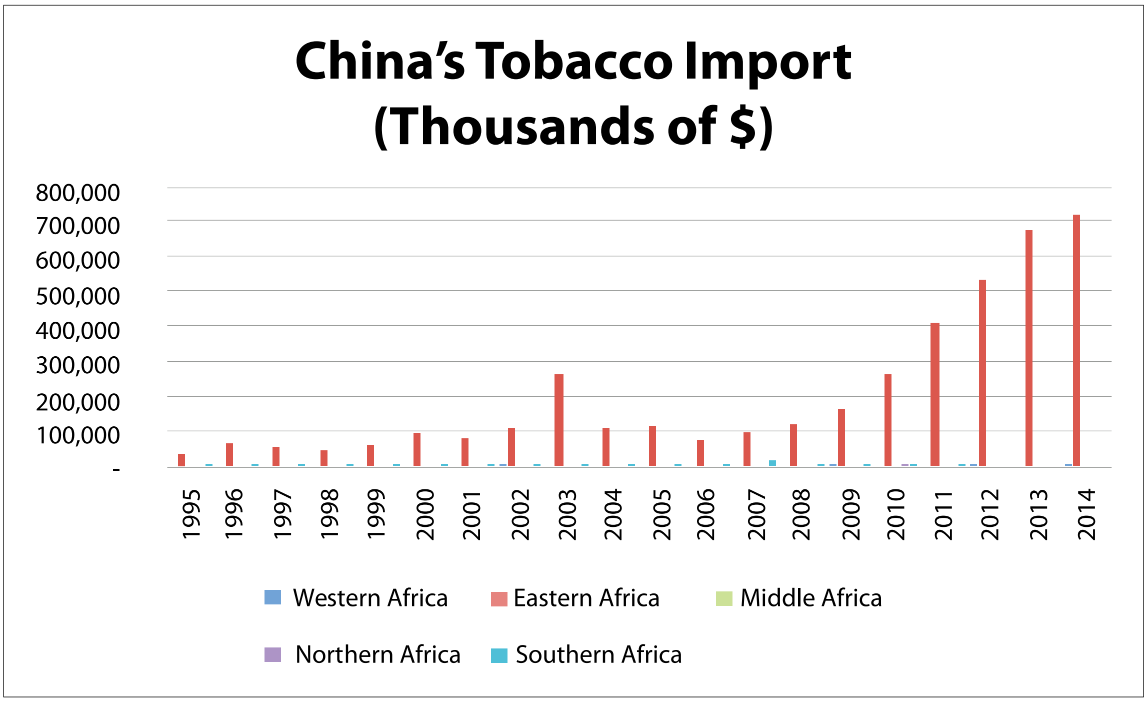
This graph shows a different aspect. Even if the main actors involved in the import of food processing machinery are always Northern, Eastern and Western Africa, their order is now different. As in the previous categories, we see China's switch of interest from Western to Eastern Africa. The former was the most important from 1995 to 2008, when it was overtaken by Eastern Africa, which now imports almost double the machinery of other regions. Northern Africa remains important as well, and has shown a constant but slow increase since 1995.

Even if, according to UNCTAD (2015), China exports agriculture machinery to almost all African countries, the most important receiver is South Africa (US$17.5m in imports), followed by Nigeria (US$13m), Egypt (US$12.6m), Algeria (US$7.7m) and Kenya (US$6.7m) (see Appendix III for specific details). The fact that four different African regions are in the top five for Chinese exports shows China's will to diversify and expand its engagement with the whole African continent. We find almost the same countries among the top recipients of food processing machinery: Nigeria (US$24.5m), South Africa (US$23.2m), Ethiopia (US$20.2m), Tanzania (US$19.4m) and Algeria (US$12.9m) (see Appendix IV for specific details). On the other side, as is to be expected, Africa's exports to China in this sector are almost non-existent.

4.3.3 *Trade in Primary Agricultural Goods: Tobacco and Cotton*

Moving on to the next category, I am now going to analyse another two important products of the primary sector: unmanufactured tobacco and cotton. Taking into considerations these two goods, we can notice that the previous trend, where China was the major exporter toward Africa, is now overturned. This is one of the few cases of Chinese engagement in African agriculture where China's imports overshadow exports. This could be explained by the fact that many African countries are still living in a condition of underdevelopment, and do not have the right resources and financial availability to domestically take care of the whole supply chain from production to distribution.

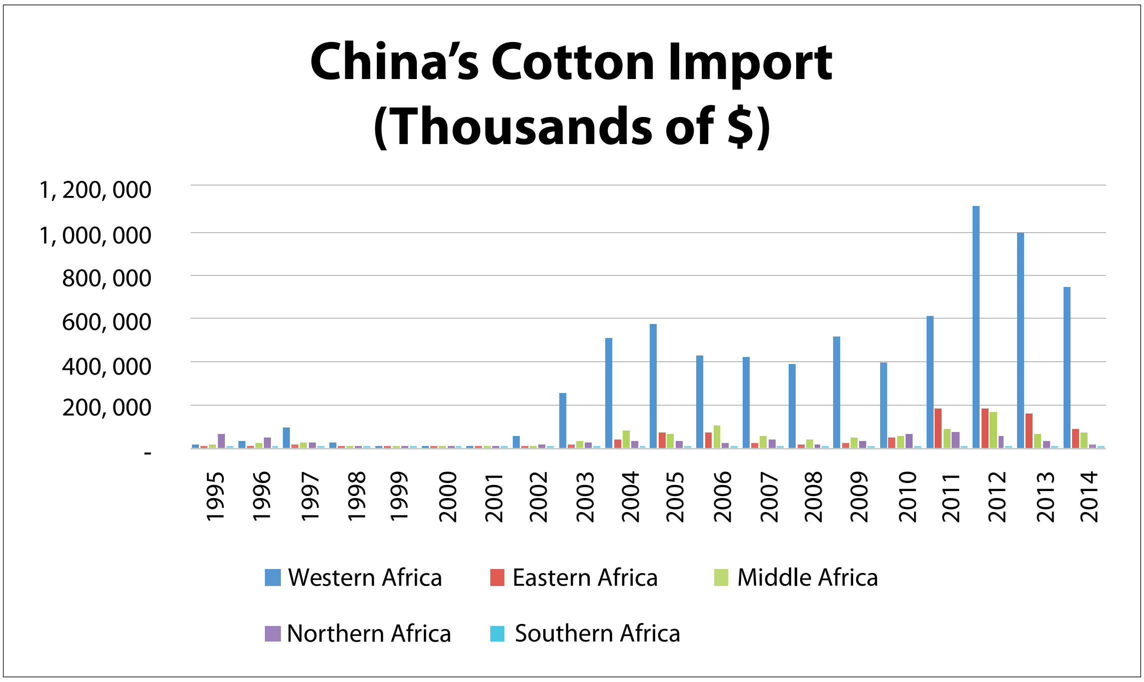
Figure 13



Source: UNCTAD, 2015

From the graph above we can notice that the only region that exports unmanufactured tobacco in a consistent way to China is Eastern Africa. Zimbabwe is the most important exporter of unmanufactured tobacco to China, and the years 2009–2010 were a turning point in which the trade almost doubled, going from US$126m to US$211m. However, trade rates are still increasing and have reached US$579m in 2014. The second most important exporter is Zambia. This is an interesting case because the country did not figure among China's top trading partners until 2005, and from that moment the export level slowly increased, reaching a new high in 2014 at US$101m. Lastly, Malawi is the third most important exporter of tobacco to China, reaching US$41m in 2014 (see Appendix V for specifics on top tobacco exporters).

Figure 14



Source: UNCTAD, 2015

Cotton is another very important product for China's import industry. This commerce is largely dominated by Western Africa, which since 2003 has always figured as the most important cotton exporter. This is the only sector so far where Middle Africa figures as an important actor, as the third largest exporter after Eastern Africa. This product is so important to China because of its always-flourishing textile and manufacturing industries. Since the 1980s these have always been central to China's economic growth, due to the vast availability of cheap labour and large numbers of foreign companies willing to establish subsidiaries in the Chinese territory. In this sector the top exporter are Mali, Benin and Burkina Faso; the first has reached important export levels from 2003, and especially from the year after, when exports tripled (from US$53m to US$167m). However, Mali reached a peak in 2012, moving up to US$554m and then stabilizing in the last two years around US$340m. Benin and Burkina Faso have not reached the same level as Mali, but they figure in an important way as well. The former had a regular increase until the years 2010–2011, when it had a drop before almost tripling in the year after (from US$95m to US$226m), and then it decreased again in 2014 to US$177m. Burkina Faso has instead steadily increased its export from 2009 to 2013, reaching a peak of US$312m, to then decrease in the last year to US$126m (see Appendix VI for specifics on top exporters of cotton).

These two graphs have brought new actors in the Chinese trade, countries without huge natural resources but were China is still willing to invest. This is the case for Zimbabwe, and Zambia to a lesser extent. These countries have been very important both for Chinese farmers' migration in the last decade, as well as for the establishment of state-owned farms and projects. They figure in the top four for Chinese approved farming proposal, with 16 projects in Zambia and 7 in Zimbabwe (Bräutigam and Zhang 2013).

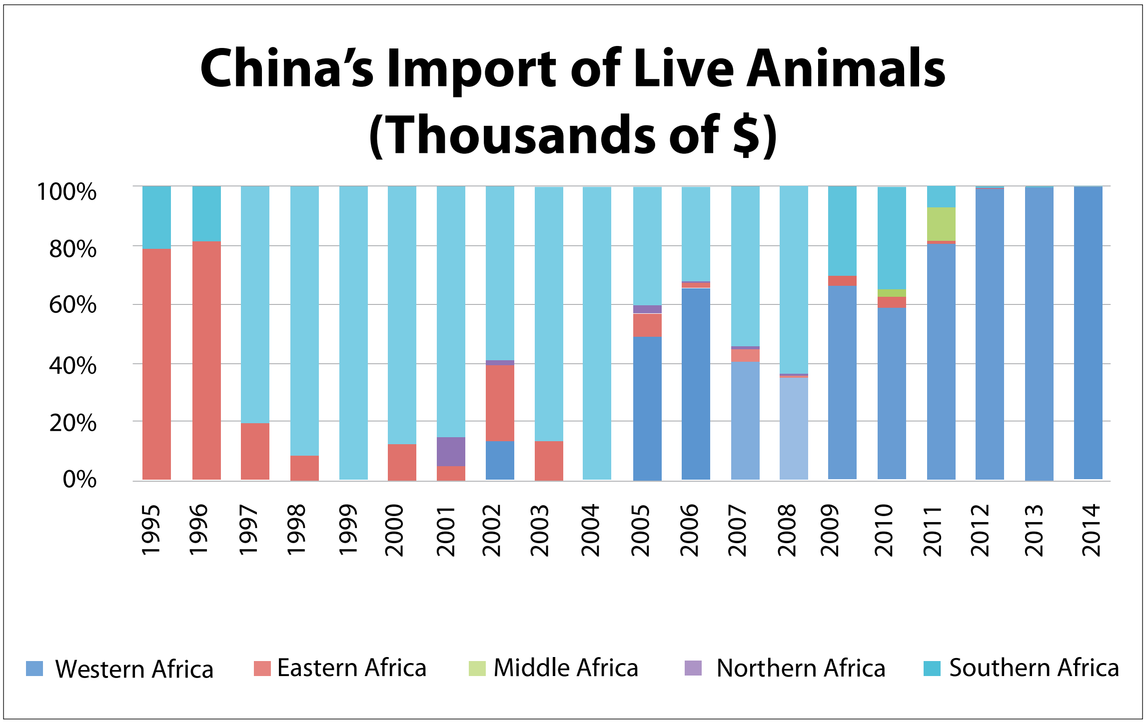
4.3.4 Trade in Food

In the last part of this chapter, I am going to analyse how important the African food industry is for China, and if this is pushing its investments in the way Western media argue. I focus on the export and import of some of the main food products like meat, rice and vegetables to understand whether China is investing in Africa with the purpose of shipping the food back home, as happens with tobacco and cotton, or if it is having a positive impact on African food production, as presented with the export of agricultural and railway machinery.

The first product that I have analysed is meat. From the figures below we can see a clear behaviour: especially in the last two years, China's percentage of live animals' import has increased. These animals are subsequently exported back to Africa as a finished product.

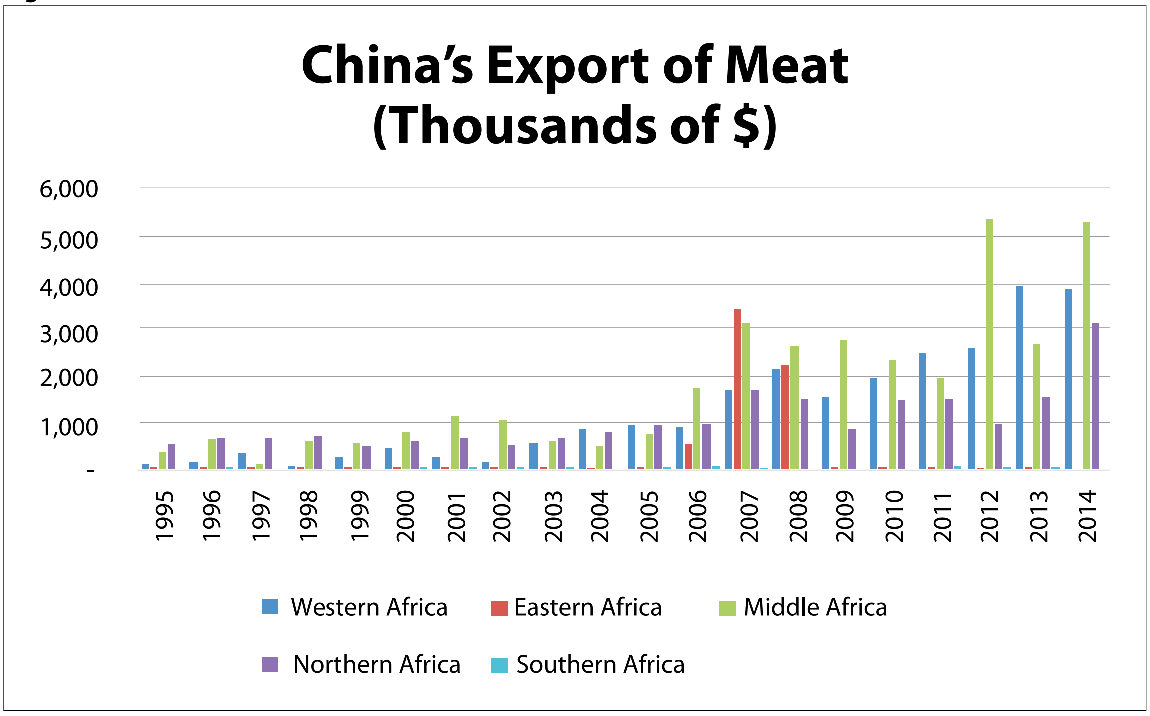
The export of live animals from Africa to China shows an increase in the last two years. From figure 13 we can see that the main exporter is Western Africa, which has reached US$729m. This is a huge figure, above all if compared to the second largest exporter, Southern Africa, that in 2014 reached US$1.27m. The main exporter

Figure 15



Source: UNCTAD, 2015

Figure 16

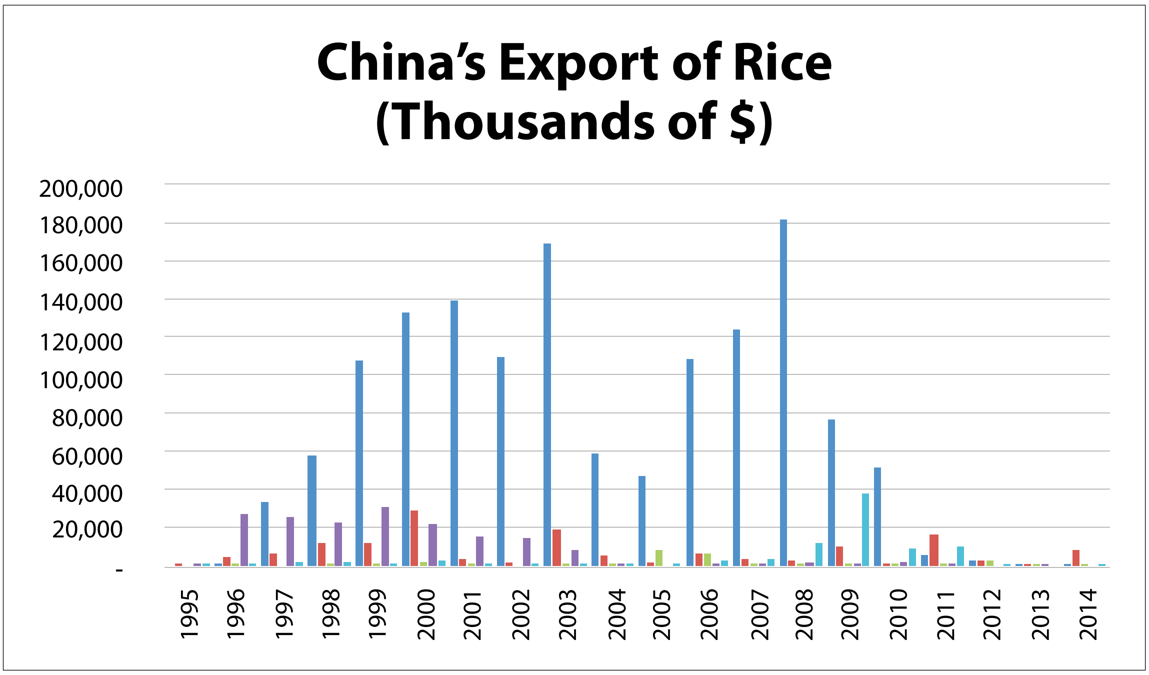


Source: UNCTAD, 2015

is Sierra Leone which controls the market with an export of US$728m in 2014. On the other side, China is exporting back to Africa the finished product, but while on one hand it has imported a total of almost US$730m in 2014, it has exported back to Africa little more than US$10m, and just US$4m to Western Africa. Although it is true that China is a very important meat exporter to Europe, Latin America and Asia, it is undeniable that China has an increasing need for meat because of its rising middle class, and because food standards and the level of caloric intake have increased, reaching those of the US (Alden 2013).

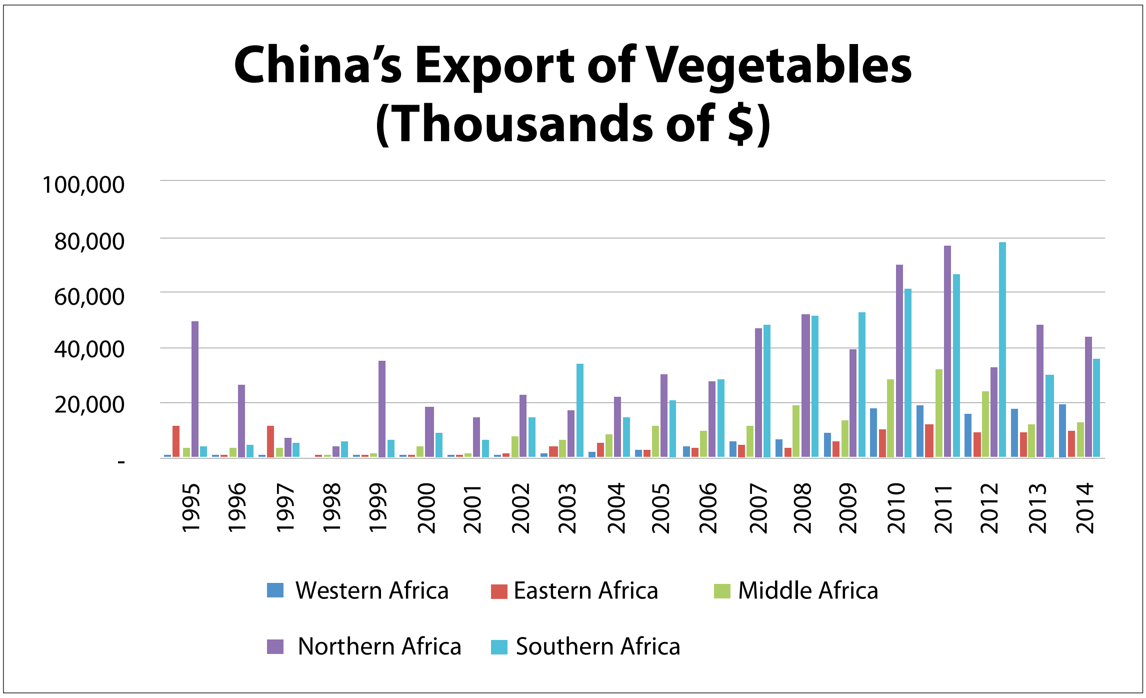
Looked at in this way, the argument of China increasing its investments since the GO policy to satisfy the increasing domestic food demand might seem true. However, looking at other products this belief falls flat. In 2012 China imported from Africa just 2.5 percent of its total agricultural imports for a sum of US$2.8bn (Zuo 2013). Moreover, as proof that China is not importing food from Africa in a consistent way, it has been reported that in 2011 Africa imported 101,968 metric tonnes of cereal (wheat, rice and maize) from China, compared to the 1 metric tonne that made the opposite journey (Bräutigam and Zhang 2013). We can see this trend happening for the import of vegetables and rice, both essential in the Chinese diet, and still modest compared to export.

Figure 17



Source: UNCTAD, 2015

Figure 18



Source: UNCTAD, 2015

From the first chart we can understand that rice export from China reached a very important level in the years 2003–2008, when it moved up to US$180m. However, the only region that was really trading this product was Western Africa, probably driven by the high Chinese migration seen in some countries in that region like Mali due to cotton production. Nevertheless, it was overtaken in 2014 by Eastern Africa. On the other hand, vegetable export is more equally distributed among the regions and has been more regular over the years, reaching a total of about US$100m in 2014, with Northern Africa as the top receiver.

Although it would have been interesting to make a comparison with the export of these products from Africa to China, I was not able to do it due to the almost nonexistent data available for this specific trade. However, this is an important finding as well because it tells us that China's main goal in Africa to date has not been to secure food for its domestic demand (apart from perhaps meat). Rather, the increasing investments from the establishment of the GO policy were driven first of all by the need to enforce its international power, and also by the will to have a positive impact on African agriculture and increase Africa's food security and agricultural production. Moreover, as the Ministry of Chinese Agriculture stated, the cost for shipping the food back to China for the quantity that the country needs would be too high and the operation would be too risky. Additionally, the global audience would not see in a good light the fact that China would be taking food away from a continent with an increasing need. Moreover, Chinese companies' strategies have recently changed in order to include the whole supply chain. This means that, instead of focusing on the mere acquisition of lands, they are also acquiring firms from developed countries in order to control the processing, logistics, marketing and distribution (Gooch and Gale 2015). These increasing and diversified investments could be motivated by the will from the Chinese government to increase the international food supply, and thus reduce food prices (Steele 2014). In this way, if China needs to feed its local demand, it will have more markets to import from, while also increasing the profits of its multinational corporations.

5. Discussion and Conclusion

Throughout this paper I have studied China's changing domestic and international patterns during the last two decades. I have analysed the GO policy, one of the most important strategies recently established in the PRC, with the aim to understand how it has changed China's international behaviour, and especially how it has affected its engagement with Africa. This study analysed particularly the impact that the GO policy has had on Sino-African agriculture-related trade. By examining Chinese investment patterns in Africa, I also explored the domestic and international motivations behind the GO policy, and what could have been the reasons behind the increasing investments in African agriculture.

The GO policy has been central to China's growth strategy over the last 15 years. Its main goal was to increase Chinese companies' competitiveness, and encourage them to invest in new markets worldwide. With its non-interference policies and affordable exports, it did not take long before China became a pivotal trade partner with countries whose trade previously was dominated by the West. That was the case in Africa, previously considered to be Western countries' privileged market. In this way, Chinese leaders have also been able to use this policy to achieve their predetermined political objective of contrasting Western hegemony both globally, and especially in Africa.

From the beginning of the millennium, Sino-African relations have stepped into a new phase thanks to the rapid growth of many emerging economies like China. The establishment of the GO policy has massively increased Chinese engagement with Africa, resulting in the nation recently becoming Africa's largest trading partner. One of the sectors that has always been important to China's strategies in Africa is agriculture. The Chinese experience and ability to manage lands and crops has given Chinese investors the possibility to have relatively easier access to African agriculture than Western countries. Additionally, Chinese leaders emphasize their similar colonial past to Africa, as a way to build a trusting relationship between the two.

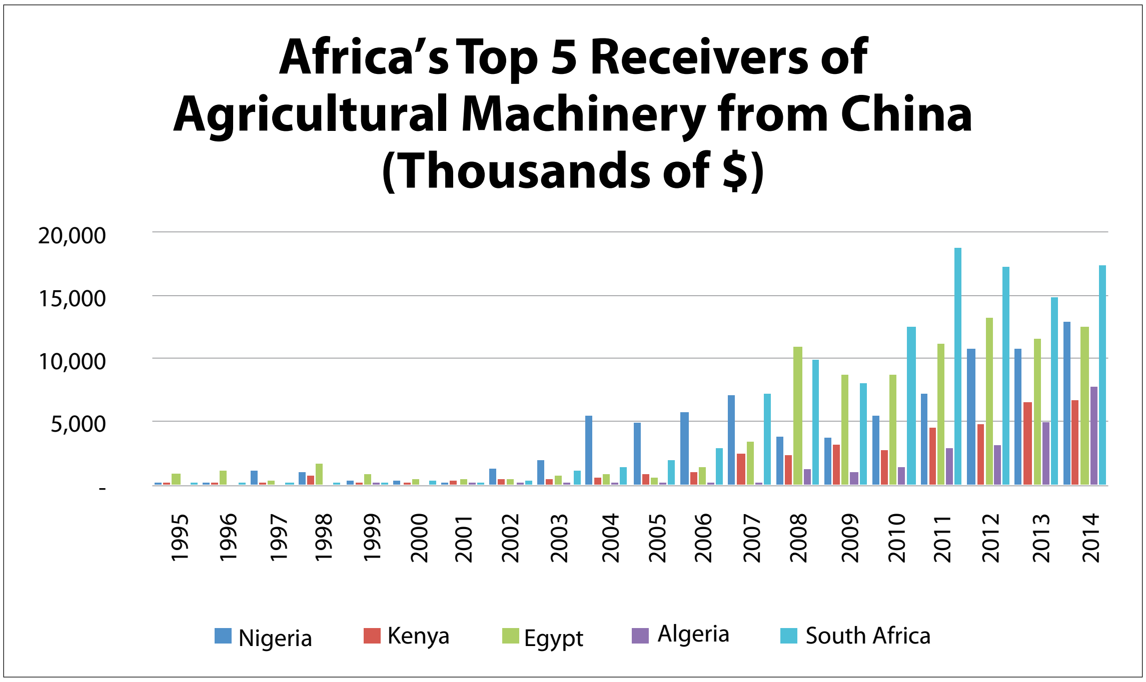
From this study, I evaluated the impact that this strategy has had on trade in agricultural products between China and Africa that, from my findings, has been very significant. My analysis reveals that the GO policy, by increasing China's international importance and economic power, has affected its business strategies and trade in Africa. Since the early 2000s, China's engagement in the continent has expanded; it has been able to create friendly relationships with the majority of African countries, bringing advantages to all the actors involved. This has brought a diversification both in trade partners and products. Looking at agriculture-related trade, I detected that across all agricultural trade, both the volumes and the values of products traded within Africa have increased. From the data that I have analysed, the establishment of the GO policy increased Chinese exports to Africa across the board, with the exception of railway machinery exports. Out of Chinese exports, products like rice, vegetables and agricultural machinery are often used to increase production to satisfy local markets. When it comes to African exports to China, tobacco and cotton are the top Chinese imports. These are generally understood to be demanded in raw form due to lack of financial investments and infrastructure in the producing countries. Chinese companies have the ability to work the raw material in a way that these African nations cannot because of a lack of infrastructure and capital.

However, the increasing amount of investments made by Chinese SOEs and private entrepreneurs has resulted in an international clamour, raised mainly by Western media and companies operating in Africa. Accusations revolving around neo-colonialism or land grabbing have been repeatedly made against China, but they have promptly been disproven over the years. Indeed, no signs of political or military repression are present in China's engagement with Africa, and on the other hand from what international organisations like FAO and WFP say, there is no presence of large-scale Chinese agricultural projects going on in Africa. Additionally, from my research there is no evidence of a trend of export of food from Africa to China, and this is also proven by the fact that China only imports 2.5 percent of agricultural products from Africa. However, it is possible that Chinese agro-business companies are using their comparative advantage to increase agricultural outcomes in African countries to fuel the international food market. This strategy to increase the international food supply will let prices decrease, and thus China will be able to feed its growing population with the possibility to also obtain what it needs from other markets.

To conclude, I have demonstrated that the 'Going Out' policy has contributed to China's new role as international leader for trade and business, regardless of its classification as a developing country. However, it is inevitable that this strategy will continue to evolve alongside the changing political economy, in order to keep Chinese firms as competitive as possible. This study illustrated that Chinese investments in agriculture-related commodities in Africa are not necessarily aimed at satisfying China's domestic food security, but rather are assisting Africa with its food security problem via increasing local productivity using improving technologies, machinery and infrastructure in the region. Policymakers and researchers in this field of study, instead of talking about China in Africa as a whole, should take into consideration more detailed factors. As previously shown, China is trading with almost all African countries, each one of them very different from the political and economic point of view; thus it is wrong to generalise and talk about 'China in Africa' as though Africa was a single country. An in-depth analysis of how China behaves with the different African countries would be very interesting to carry out, to see how Chinese strategies adapt to the different political environments in Africa. However, looking at China's economic strategies, questions still arise. In the long run, Chinese investments in Africa could merely serve China's growing population but, on the contrary, China's influence, investment and commitment in Africa could also offer solutions to the continent's food security challenges. More research into this question is necessary to assess how China's role will evolve in the near future, especially taking into consideration the country's recent economic slowdown and devaluation of the Renmimbi. These two factors will inevitably affect Sino-African relations, and especially the export of goods from Africa to China. For this reason it will be interesting to pursue further research in order to understand how this slowdown will impact on China's development strategies in the African continent, and particularly towards agriculture-related trade.

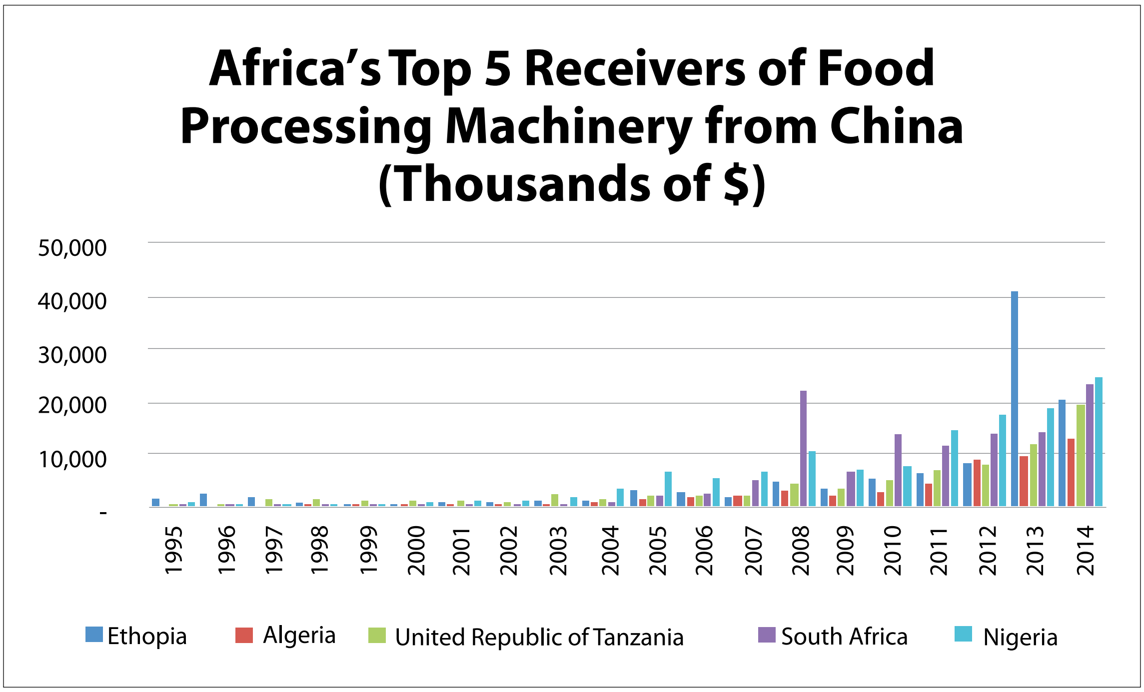
Appendices

Appendix I



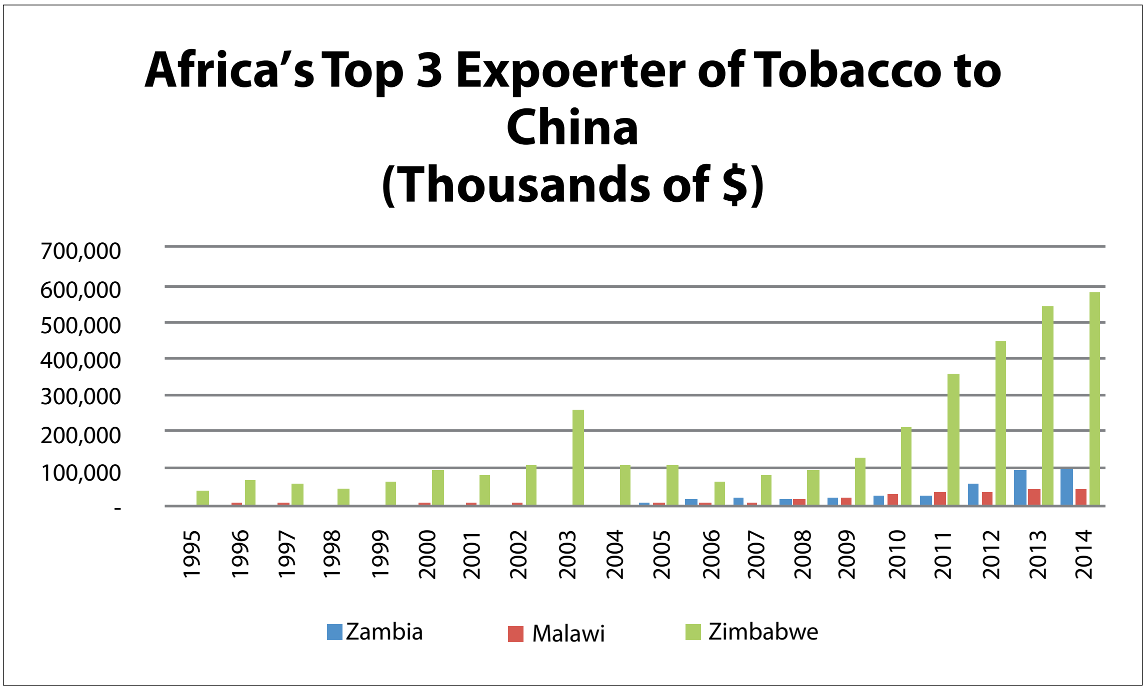
Source: UNCTAD, 2015

Appendix II



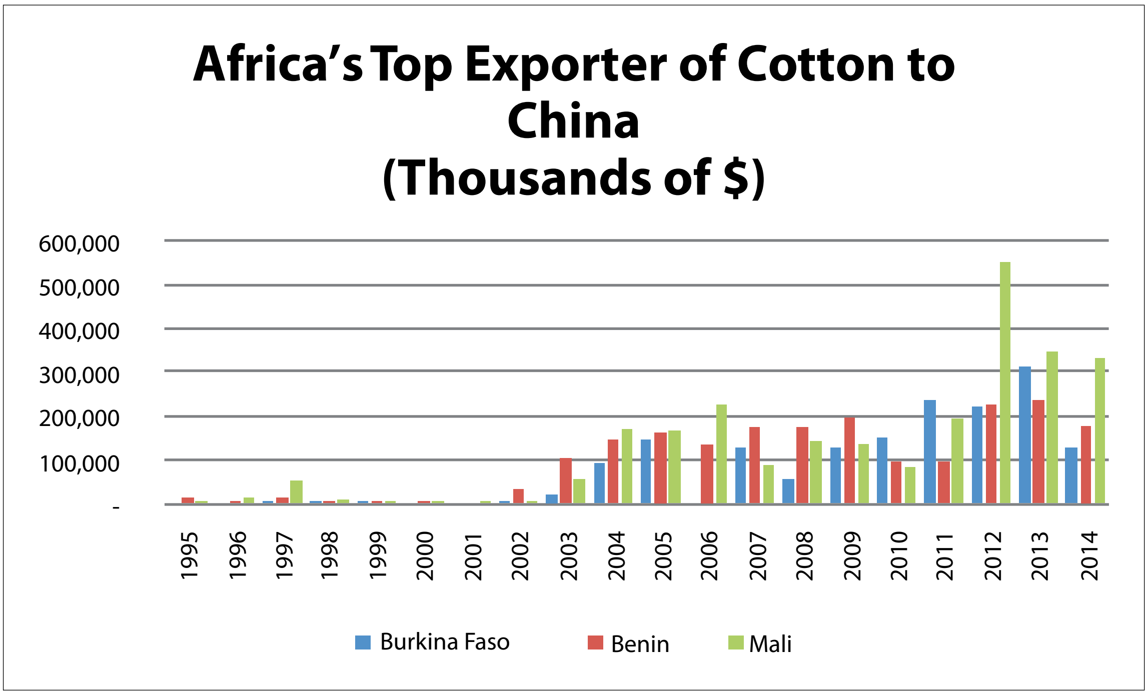
Source: UNCTAD, 2015

Appendix III



Source: UNCTAD, 2015

Appendix IV



Source: UNCTAD, 2015

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FAC appreciates the support of the UK Economic and Social Research Council and UK Department for International Development (DfID)

Funded By

The views expressed do not necessarily reflect the UK Government's official policies.