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## FOCAC INTELLIGENCE

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# Ethiopia Country Brief

Post-Beijing FOCAC delivery in Ethiopia: trade access, a flagship tripartite centre, grant assistance and the debt settlement, verified to 30 September 2026

### AT A GLANCE

**100%**

Tariff lines at zero duty since 1 Dec 2024

**US\$369m**

Ethiopian exports to China, FY2025/26

**RMB200m**

Grant signed Feb 2026 (A3); projects not published

**US\$3.5bn+**

Debt relief from all official creditors (China co-chair)



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**Technical team:** Dr. Henry Anibe Agbonika, Adejumobi Fashola, Dr. Tokunbo Alaga Olorundami, Tijesunimi Falade, Mbotidem Jackson

### Policy Delivery International Limited (PDIL)

policydelivery.africa | info@policydelivery.africa | +2348156527286 | Ventures Park, 5 Kwaji Close, Maitama, Abuja, Nigeria



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## Executive summary

### FOCAC and this brief

The Forum on China-Africa Cooperation (FOCAC), founded in Beijing in 2000, is the main platform through which China, the 53 African countries with which it has diplomatic relations and the African Union Commission set shared priorities for cooperation. The September 2024 Beijing Summit adopted the Beijing Action Plan (2025-2027): ten partnership actions, RMB360 billion in announced financial support and zero-tariff treatment for Africa's least developed countries, which China extended in June 2025 to all 53 African partners with effect from 1 May 2026. The cycle will be reviewed at the 10th FOCAC Ministerial Conference in the Republic of the Congo in 2027.

This brief asks what the current cycle has actually delivered in Ethiopia, and how much of it is genuinely new FOCAC delivery. Each record is tested against a conservative method that separates what was announced from what was delivered, and new FOCAC delivery from cooperation that was already under way (Annex B).

### Why Ethiopia matters in this wider picture

Ethiopia is the seat of the African Union, China's largest single Africa programme by project count (4,510 Chinese-run investment projects, per the Ethiopian Investment Commission in April 2025), and one of only a handful of African states holding an all-weather strategic partnership with Beijing. It is also a Common Framework debtor with China as co-chair of its Official Creditor Committee. Ethiopia therefore tests whether the 2024 FOCAC package adds anything distinct to a relationship that was already dense in infrastructure, industrial parks and credit, or whether post-summit activity is mostly continuity carried under a new label.

### What we found

**Ethiopia's post-Beijing FOCAC record is substantial in volume but thin in directly attributable delivery. The one clear A1 item, zero-tariff access on 100 per cent of tariff lines, is in operational use, yet it extended a 98 per cent preference Ethiopia already held from March 2023. The most prominent FOCAC-branded asset, the China-Africa-UNIDO Center of Excellence, is real and operating but was agreed and first inaugurated before the summit. The weightier post-summit movements, the debt settlement and new grant money, are both post-summit bilateral (A3): they sit in Common Framework and bilateral channels rather than the FOCAC architecture.**

Across the four core records, two have reached operational use (zero-tariff access and the UNIDO centre) and two remain at signed agreement (the Official Creditor Committee MoU with China as co-chair, and the RMB200 million grant). By attribution, one is A1 (zero tariffs), two are A3 (the debt treatment and the grant) and one is A4 (the UNIDO centre). None has reached verified results. Ethiopian exports to China of US\$369 million in FY2025/26 are an Ethiopian official figure, but no source isolates the effect of the tariff preference from price, volume and new-protocol effects such as soybean meal access in July 2025.

Attribution weakens as materiality rises. The debt treatment, China's most consequential post-summit act in Ethiopia, is a Common Framework process with no FOCAC documentary link, and China's bilateral agreement

was reported as agreed in principle on 3 April 2026 without a published signed text by the cut-off. The grant echoes the 'small but beautiful' language China used at the summit, but the official record of its signing carries no FOCAC reference, so it is classed A3. Large private commitments (Ming Yang's US\$14.1 billion renewable licence, US\$1.7 billion in minerals and solar manufacturing deals) are commercial and should not be counted as FOCAC delivery.

|                                                                                          |                                                                                           |                                                                       |                                                                                    |
|------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|-----------------------------------------------------------------------|------------------------------------------------------------------------------------|
| <b>4</b><br><b>Core records subjected to full verification</b><br>One A1, two A3, one A4 | <b>1</b><br><b>Direct FOCAC delivery (A1)</b><br>Zero-tariff access, 100% of tariff lines | <b>13</b><br><b>Wider activities screened</b><br>Sep 2024 to Sep 2026 | <b>0</b><br><b>Records at verified results</b><br>No outcome data yet attributable |
|------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|-----------------------------------------------------------------------|------------------------------------------------------------------------------------|

## The trade window

Ethiopia's position differs from the other countries in this series. As a least developed country it received zero-tariff treatment on 100% of tariff lines from 1 December 2024, the first FOCAC trade commitment to take effect, and its access is not tied to the April 2028 deadline that applies to non-LDCs. An early harvest arrangement is an interim, reciprocal trade deal under the framework agreement that locks in China's zero tariffs beyond the temporary window. Section 3 sets out the instruments and what to watch.

## Priorities before the 2027 review

- 1. Separate recognition from new delivery.** Chinese outcome lists count pre-existing platforms.
- 2. Treat tariff access as a pipeline problem.** Zero duty did little for Ethiopia until sanitary protocols, buyers and logistics followed.
- 3. Demand project lists for grants.** Signed grants without published allocations cannot be monitored.

### BOTTOM LINE

**Ethiopia's post-Beijing FOCAC delivery is real but narrow: one direct item in use, one recognised legacy platform, and weightier bilateral files still at agreement.**

Ethiopia's post-Beijing FOCAC record is dense in activity but thin in directly attributable delivery. Zero-tariff access is operating, though it added only the final two per cent of tariff lines; the China-Africa-UNIDO Center of Excellence is operating, though it predates the summit. The debt treatment and the RMB200 million grant are post-summit bilateral (A3), with no FOCAC reference in the official record. No record has reached verified results.

SECTION 1

FOCAC in context

The Forum on China-Africa Cooperation (FOCAC) was established in Beijing in October 2000 as a platform for collective dialogue and practical cooperation between China and African countries. It has since developed into a recurring architecture of summits, ministerial conferences, senior officials meetings and country-level follow-up arrangements. As of 2026, its membership comprises China, 53 African countries that have diplomatic relations with China, and the African Union Commission.

|                                                   |                                                                            |                                                                   |                                                                   |
|---------------------------------------------------|----------------------------------------------------------------------------|-------------------------------------------------------------------|-------------------------------------------------------------------|
| <b>2000</b><br>Founded in Beijing<br>October 2000 | <b>53 + AUC</b><br>African members<br>plus the African Union<br>Commission | <b>10</b><br>Partnership actions<br>Beijing Action Plan 2025-2027 | <b>RMB360bn</b><br>Financial support<br>over the three-year cycle |
|---------------------------------------------------|----------------------------------------------------------------------------|-------------------------------------------------------------------|-------------------------------------------------------------------|

FOCAC matters because it has become one of the principal institutional channels through which China and African states organise cooperation across trade, infrastructure, agriculture, health, industrialisation, education, science and technology, green development, financing and security. The framework is not a treaty organisation and it does not replace national development strategies. Its practical importance lies in the political commitments, financing windows, bilateral agreements, technical programmes and projects that are subsequently negotiated and implemented through participating governments and institutions.



Figure 1. Key milestones: from FOCAC's founding to the 2027 review point.

The 2024 Beijing Summit and the current cycle

The 2024 Beijing Summit adopted the Beijing Declaration and the FOCAC Beijing Action Plan for 2025-2027. The Action Plan is organised around ten partnership actions: mutual learning, trade prosperity, industrial chain cooperation, connectivity, development cooperation, health, agriculture and livelihoods, people-to-people exchanges, green development and common security.

**Figure 2.** The ten partnership actions of the FOCAC Beijing Action Plan (2025-2027).

|                              |                                          |                                           |                                |                                      |
|------------------------------|------------------------------------------|-------------------------------------------|--------------------------------|--------------------------------------|
| <b>01</b><br>Mutual learning | <b>02</b><br>Trade prosperity            | <b>03</b><br>Industrial chain cooperation | <b>04</b><br>Connectivity      | <b>05</b><br>Development cooperation |
| <b>06</b><br>Health          | <b>07</b><br>Agriculture and livelihoods | <b>08</b><br>People-to-people exchanges   | <b>09</b><br>Green development | <b>10</b><br>Common security         |

China also announced RMB360 billion in financial support over the three-year cycle, comprising RMB210 billion in credit lines, RMB80 billion in assistance in various forms, and at least RMB70 billion in investment by Chinese companies. The current cycle will culminate in the 10th FOCAC Ministerial Conference in the Republic of the Congo in 2027, creating a clear review point for assessing what has moved from commitment into implementation and results.

#### RMB360bn financial support, FOCAC 2025-2027 cycle

| RMB210bn     | RMB80bn                     | RMB70bn+                        |
|--------------|-----------------------------|---------------------------------|
| Credit lines | Assistance in various forms | Investment by Chinese companies |
| 58% of total | 22% of total                | 19% of total                    |

**Figure 3.** Composition of China's announced financial support for the 2025-2027 cycle.

## What FOCAC could make possible for Africa

For Africa, the strategic value of FOCAC lies less in the headline scale of commitments than in how effectively African governments connect the framework to continental, regional and national priorities. The African Union's Agenda 2063 places particular emphasis on inclusive growth, infrastructure, industrialisation, agriculture and value addition, science and technology, human capital, regional integration and peace and security. These areas overlap substantially with the current FOCAC agenda.

| Possibility for Africa                  | What it could mean in practice                                                                                                                                                                                 |
|-----------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Industrialisation and value chains      | Use Chinese investment, industrial parks, manufacturing partnerships and supply-chain cooperation to expand African production, processing and exports rather than remain concentrated in raw-material supply. |
| Trade and market access                 | Convert tariff preferences and economic partnership arrangements into higher-value African exports, stronger standards compliance, logistics capability and more diversified trade baskets.                    |
| Infrastructure and regional integration | Align connectivity investments with PIDA, AfCFTA corridors, ports, railways, energy systems and digital infrastructure that lower the cost of moving goods, people and data across African markets.            |
| Agriculture and food systems            | Use demonstration centres, technology transfer, irrigation, mechanisation, processing and market access to raise productivity and build regional agro-industrial value chains.                                 |
| Technology and knowledge transfer       | Move beyond equipment acquisition towards joint laboratories, research partnerships, vocational training, digital capabilities, local maintenance and applied innovation.                                      |

| Possibility for Africa | What it could mean in practice                                                                                                                                          |
|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Green transition       | Channel cooperation into renewable energy, grid expansion, clean technologies, climate-resilient infrastructure and African participation in emerging green industries. |
| Development finance    | Use grants, credit, equity, insurance and blended structures selectively, with stronger project preparation, transparency and fiscal discipline.                        |

#### THE AFRICAN IMPLEMENTATION CHALLENGE

These possibilities are not automatic. The development value of FOCAC depends heavily on African agency: the quality of project preparation, negotiating capacity, alignment with national plans, transparency of financing terms, local content, technology absorption, regional coordination and the ability to measure results after assets are built or agreements are signed.

A credible African monitoring approach therefore needs to distinguish between announcements, signed agreements, financing commitments, implementation, operational use and verified results. It also needs to separate projects conceived before the 2024 Summit from genuinely additional commitments arising from the current cycle. Without these distinctions, activity can easily be mistaken for delivery.

#### THE CENTRAL QUESTION

How much of China's post-September 2024 activity in Ethiopia can be traced to the Beijing Summit commitments, and how far has any of it moved beyond agreement into operational use and measurable results?

The rest of this brief applies this test to Ethiopia. Section 2 sets out the verified records, Section 3 the trade instruments that will shape the next phase, and Section 4 what the evidence means for policy and business.

## SECTION 2

# What has been delivered in Ethiopia

*4 records assessed in full against the PDIL method*

## Verified implementation picture

| Initiative                                                                | Current position | Attribution     | Grade | Assessment                                                                                                                                                                          |
|---------------------------------------------------------------------------|------------------|-----------------|-------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Zero-tariff treatment, 100% of tariff lines</b>                        | Operational use  | A1 Direct       | A     | In force since 1 Dec 2024 for LDCs including Ethiopia per China MFA follow-up list; used by Ethiopian exporters, with a MOFCOM-organised export session in Addis Ababa in Aug 2026. |
| <b>China-Africa-UNIDO Center of Excellence</b>                            | Operational use  | A4 Pre-existing | A     | Inaugurated 12 Jul 2024, officially launched 5 Nov 2024; named in the Beijing Action Plan and China's June 2025 follow-up outcomes list, with twelve projects designed in Feb 2025. |
| <b>Official Creditor Committee MoU and China bilateral debt treatment</b> | Agreement        | A3 Bilateral    | A     | MoU concluded 2 Jul 2025 with China and France as co-chairs; China bilateral terms agreed in principle 3 Apr 2026, signed text not published.                                       |

| Initiative                                              | Current position | Attribution  | Grade | Assessment                                                                                                                                                              |
|---------------------------------------------------------|------------------|--------------|-------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| RMB200 million grant for 'small but beautiful' projects | Agreement        | A3 Bilateral | B     | Signed 4 Feb 2026 by Finance Minister Ahmed Shide and Ambassador Chen Hai, with no FOCAC reference in the official record; project list and disbursement not published. |

Attribution: A1 direct FOCAC delivery; A2 plausibly attributable; A3 post-summit bilateral; A4 pre-existing; A5 disputed or unverified. Evidence grade: A independently corroborated to D insufficient. Full method in Annex B.



Figure 4. Where each verified Ethiopia record sits on the delivery ladder at the verification cut-off.

1. Zero-tariff treatment on 100% of tariff lines

| COMMITMENT                                                 | EFFECTIVE                                                                 | DELIVERY STAGE  | ATTRIBUTION | EVIDENCE GRADE |
|------------------------------------------------------------|---------------------------------------------------------------------------|-----------------|-------------|----------------|
| FOCAC 2024: zero tariff for LDCs with diplomatic relations | 1 December 2024 (LDCs); extended to all 53 African states from 1 May 2026 | Operational use | A1 Direct   | A              |

President Xi Jinping announced at the September 2024 Beijing Summit that China would grant zero-tariff treatment on 100 per cent of tariff lines to all least developed countries with which it has diplomatic relations. China's Ministry of Foreign Affairs records the measure as in effect from 1 December 2024. Ethiopia, as an LDC, has been covered since that date; the May 2026 extension to all 53 African partners adds nothing further for Ethiopia.

The incremental margin is narrow. Ethiopia already enjoyed zero tariffs on 98 per cent of tariff lines from 1 March 2023, confirmed by China's Assistant Minister of Commerce at a February 2023 signing with the Ethiopian Ministry of Finance. The 2024 measure therefore closed the last two per cent rather than opening the market. Ambassador Chen Hai has cited coffee, avocados and flowers as beneficiaries.

Use is visible. On 19 to 20 August 2026 MOFCOM, the Chinese Embassy and Ethiopia's Ministries of Trade and Regional Integration and of Finance ran a 'Big Market for All: Export to China' session in Addis Ababa, at which

33 agreements worth over US\$330 million were signed and Ethiopian exports to China were put at US\$369 million for FY2025/26. The trade deficit with China remains very large, and no data separates the tariff effect from other drivers.

CURRENT ASSESSMENT

Direct FOCAC delivery in operational use, but a marginal step on a preference Ethiopia already held, with export gains not yet attributable to it.

Evidence for this record

- China MFA, FOCAC follow-up outcomes list (Jun 2025): [www.mfa.gov.cn/eng/wjbzhd/202506/t20250611\\_11646041.html](http://www.mfa.gov.cn/eng/wjbzhd/202506/t20250611_11646041.html)
- Xinhua, 'Export to China' Ethiopia session (Aug 2026): [english.news.cn/20260820/4211d76d33d64b3991b11331978d90cc/c.html](http://english.news.cn/20260820/4211d76d33d64b3991b11331978d90cc/c.html)
- Gov.cn, zero-tariff extension (May 2026): [english.www.gov.cn/policies/policywatch/202605/01/content\\_WS69f45e35c6d00ca5f9a0ac01.html](http://english.www.gov.cn/policies/policywatch/202605/01/content_WS69f45e35c6d00ca5f9a0ac01.html)

2. China-Africa-UNIDO Center of Excellence, Addis Ababa

| PARTNERS                                                                           | KEY DATES                                                                                  | DELIVERY STAGE  | ATTRIBUTION                                        | EVIDENCE GRADE |
|------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|-----------------|----------------------------------------------------|----------------|
| CIDCA, UNIDO, Ethiopian Ministry of Industry; hosted at the Federal TVET Institute | Inaugurated 12 Jul 2024; officially launched 5 Nov 2024; twelve projects designed Feb 2025 | Operational use | A4 Pre-existing (named in the Beijing Action Plan) | A              |

The centre is a tripartite platform of China's International Development Cooperation Agency, UNIDO and Ethiopia, covering sustainable industrialisation, agricultural modernisation and skills. UNIDO records its inauguration in Addis Ababa on 12 July 2024, when agreements for two Ethiopian projects on mechanised agriculture and livestock value chains were signed; Xinhua reports its official launch at the Federal Technical and Vocational Training Institute on 5 November 2024.

The FOCAC link is documentary but backward-looking. The Beijing Action Plan (2025-2027) 'commends the establishment of tripartite demonstration center by China, Ethiopia and UNIDO', and China's June 2025 follow-up list reports the centre 'set up and officially launched in Ethiopia' with three projects in industrialisation, agricultural modernisation and talent cultivation implemented. Under PDIL's rule that projects begun before September 2024 are recorded as pre-existing, the centre is A4 despite the direct text.

Post-summit activity is real. On 28 February 2025 UNIDO, the Ministry of Industry and CIDCA agreed designs for twelve projects across the three themes, and CIDCA reported a first human resource project in December 2024. No public source reports project-level outputs, beneficiaries or budgets after mid-2025.

CURRENT ASSESSMENT

An operating FOCAC-branded platform whose origin predates the summit; its post-summit project portfolio is the part worth tracking for A1 delivery.

Evidence for this record

- UNIDO, inauguration (Jul 2024): [www.unido.org/news/unido-china-and-ethiopia-inaugurate-centre-excellence-boost-sustainable-industrialization-africa](http://www.unido.org/news/unido-china-and-ethiopia-inaugurate-centre-excellence-boost-sustainable-industrialization-africa)

- UNIDO, twelve-project design (Feb 2025): [www.unido.org/news/tripartite-cooperation-industrial-development-africa-china-africa-unido-center-excellence](http://www.unido.org/news/tripartite-cooperation-industrial-development-africa-china-africa-unido-center-excellence)
- China MFA, FOCAC follow-up outcomes list (Jun 2025): [www.mfa.gov.cn/eng/wjbzhd/202506/t20250611\\_11646041.html](http://www.mfa.gov.cn/eng/wjbzhd/202506/t20250611_11646041.html)

### 3. Official Creditor Committee MoU and China bilateral debt treatment

| CHANNEL                                                         | KEY DATES                                                                                          | DELIVERY STAGE   | ATTRIBUTION         | EVIDENCE GRADE |
|-----------------------------------------------------------------|----------------------------------------------------------------------------------------------------|------------------|---------------------|----------------|
| <b>G20 Common Framework; OCC co-chaired by China and France</b> | <b>Agreement in principle Mar 2025; MoU 2 Jul 2025; China terms agreed in principle 3 Apr 2026</b> | <b>Agreement</b> | <b>A3 Bilateral</b> | <b>A</b>       |

Ethiopia's Ministry of Finance announced on 2 July 2025 that it had concluded a Memorandum of Understanding with its Official Creditor Committee, co-chaired by China and France, formalising the treatment agreed in principle in March 2025 and providing over US\$3.5 billion in relief. Implementation runs through bilateral agreements with each committee member.

China is Ethiopia's largest bilateral creditor. Finance Minister Ahmed Shide led a delegation to Beijing in late March 2026 to negotiate with China Exim Bank, ICBC and China Development Bank, and ENA reported on 3 April 2026 that both sides had agreed on debt treatment and would finalise a bilateral agreement within the Common Framework. Bilateral agreements with France (February 2026) and Italy (March 2026) were reported signed; no signed Chinese bilateral text was found by 30 September 2026.

No FOCAC document ties the treatment to the Beijing Summit, and Chinese official summaries of FOCAC follow-up do not mention it. The file also remains open on the commercial side: bondholders reached an agreement in principle in 2026, and official creditors have questioned elements of that deal on comparability grounds.

#### CURRENT ASSESSMENT

The most material post-summit China file in Ethiopia, firmly bilateral and multilateral in channel and still short of a published China agreement.

#### Evidence for this record

- Ethiopian Ministry of Finance, OCC MoU (Jul 2025): [www.mofed.gov.et/blog/the-ethiopian-government-concludes-memorandum-of-understanding-with-its-official-creditor-committee-under-the-g20-common-framework/](http://www.mofed.gov.et/blog/the-ethiopian-government-concludes-memorandum-of-understanding-with-its-official-creditor-committee-under-the-g20-common-framework/)
- ENA, Ethiopia-China talks (Apr 2026): [www.ena.et/web/eng/w/eng\\_8595101](http://www.ena.et/web/eng/w/eng_8595101)
- Capital, Beijing negotiations (Mar 2026): [capitalethiopia.com/2026/03/30/ethiopiachina-reach-final-stage-of-strategic-debt-restructuring-negotiations-in-beijing/](http://capitalethiopia.com/2026/03/30/ethiopiachina-reach-final-stage-of-strategic-debt-restructuring-negotiations-in-beijing/)

### 4. RMB200 million grant for 'small but beautiful' projects

| SIGNATORIES                                                 | DATE                   | DELIVERY STAGE   | ATTRIBUTION         | EVIDENCE GRADE |
|-------------------------------------------------------------|------------------------|------------------|---------------------|----------------|
| <b>Finance Minister Ahmed Shide and Ambassador Chen Hai</b> | <b>4 February 2026</b> | <b>Agreement</b> | <b>A3 Bilateral</b> | <b>B</b>       |

Ethiopia and China signed an RMB200 million grant agreement on 4 February 2026 to finance 'small but beautiful' development projects intended to deliver quick, tangible benefits. The meeting also covered the new international airport and an AI sovereign model initiative.

The 'small but beautiful' formula echoes the language China used at the Beijing Summit for livelihood projects, but neither the Ethiopian reporting of the signing nor the Chinese official sources reviewed cite FOCAC or the Summit. Under PDIL's attribution rules, a grant signed after September 2024 with no FOCAC framing in the official record is post-summit bilateral (A3); this is the same rule applied to Kenya's RMB100 million grant (Volume 2). Nigeria's RMB200 million grant (Volume 1) is classed A2 because it was announced at a meeting framed as implementing the Summit outcomes.

The agreement text, project list and disbursement schedule have not been published. On delivery stage, the record compares with Nigeria's RMB200 million grant, which PDIL holds at announcement because no signed agreement has been published; Ethiopia's is one stage further because a signing is officially reported.

CURRENT ASSESSMENT

A signed but unallocated grant with no documented FOCAC link; delivery cannot be assessed until projects are named and financed.

Evidence for this record

- AllAfrica (ENA), grant signing (Feb 2026): [allafrica.com/stories/202602050031.html](https://allafrica.com/stories/202602050031.html)

SECTION 3

Zero tariffs without a trade negotiation

Ethiopia's position differs from the other countries in this series. As a least developed country it received zero-tariff treatment on 100% of tariff lines from 1 December 2024, the first FOCAC trade commitment to take effect, and its access is not tied to the April 2028 deadline that applies to non-LDCs.

The gain is modest because Ethiopia already had zero tariffs on about 98% of lines from March 2023. No framework agreement or early harvest arrangement had been signed by the cut-off; China's Ambassador said in June 2025 that market access negotiations were about to commence.

| Instrument                                  | Status at cut-off                 | What it means                                                                     |
|---------------------------------------------|-----------------------------------|-----------------------------------------------------------------------------------|
| Zero-tariff treatment (LDC)                 | In force since 1 December 2024    | 100% of tariff lines; builds on 98% coverage from 2023                            |
| Framework agreement on economic partnership | Not signed at cut-off             | Negotiations signalled in June 2025                                               |
| Early harvest arrangement                   | Not applicable yet                | Less urgent than for non-LDCs, but relevant if Ethiopia graduates from LDC status |
| SPS protocols                               | Soybean meal (July 2025, grade C) | Market access for coffee, sesame and pulses depends on SPS more than tariffs      |

WHAT IS AN EARLY HARVEST ARRANGEMENT?

China's trade offer to Africa moves in steps. First, China grants zero tariffs unilaterally: to least developed countries since 1 December 2024, and to the other 20 African partners from 1 May 2026 to 30 April 2028. Second, a country signs a framework agreement on economic partnership for shared development, which sets the agenda but changes no tariffs. Third, it negotiates an early harvest arrangement: a reciprocal deal that binds China's zero tariffs on the country's exports beyond 2028, usually in return for the African partner opening its own market to an agreed list of Chinese goods. Chapters on services, investment and standards follow later.

**Where Ethiopia stands: as a least developed country, Ethiopia's zero-tariff access is not tied to the 2028 deadline, so an early harvest arrangement is less urgent. No framework agreement had been signed at the cut-off.**

WHAT TO WATCH

For Ethiopia the binding constraints are not tariffs but volumes, standards, logistics and foreign exchange. Watch export growth beyond coffee and sesame, and whether the debt treatment with China is signed.

SECTION 4

What the Ethiopia evidence tells us

The Ethiopian record shows how FOCAC operates in a country where Chinese engagement was already deep. The summit's clearest instrument, zero-tariff access, is in use but was largely pre-delivered. Its flagship Ethiopian asset was inaugurated before the summit and recognised in its outcome documents. The larger financial movements run through the Common Framework and bilateral grant channels, and the largest new capital flows are private. Post-summit delivery in Ethiopia takes five recognisable forms:

|                                            |                                             |                                                        |                                                        |                                                            |
|--------------------------------------------|---------------------------------------------|--------------------------------------------------------|--------------------------------------------------------|------------------------------------------------------------|
| Trade preferences already largely in place | FOCAC recognition of pre-existing platforms | Common Framework debt treatment with China as co-chair | Bilateral grant money without a published project list | Private Chinese investment in renewables, minerals and EVs |
|--------------------------------------------|---------------------------------------------|--------------------------------------------------------|--------------------------------------------------------|------------------------------------------------------------|

Figure 5. The forms FOCAC delivery is taking in Ethiopia.

The pattern matters for attribution. Chinese official summaries naturally count Ethiopian items, including the UNIDO centre, as FOCAC outcomes. PDIL's method separates recognition from origination; on that test, the Ethiopian core file rests on one direct delivery item (A1), two post-summit bilateral records (A3) and one pre-existing platform (A4), with plausibly attributable activity confined to the wider register.

It also matters for Ethiopia's leverage. With exports to China at a few hundred million dollars against imports in the billions, and debt treatment still to be finalised with Beijing, the practical gains lie in the export pipeline (soybean meal access, the August 2026 export session) and in holding the grant and the Center of Excellence to published, measurable outputs.

## Key evidence gaps

| # | Area                                    | Open question                                                                                                                                 |
|---|-----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | China bilateral debt agreement          | Has the Ethiopia-China bilateral agreement under the Common Framework been signed, and on what terms?                                         |
| 2 | RMB200 million grant                    | Which projects will the grant finance, through which agency, and on what disbursement schedule?                                               |
| 3 | China-Africa-UNIDO Center of Excellence | What outputs, beneficiaries and budgets have the twelve designed projects produced since 2025?                                                |
| 4 | Zero-tariff utilisation                 | What share of Ethiopian exports to China entered under the new 2% of lines, and what does China customs record for 2025 bilateral trade?      |
| 5 | Economic partnership framework          | Has Ethiopia opened talks with China on a framework agreement on economic partnership for shared development or an early harvest arrangement? |

## Implications for the 2027 FOCAC cycle

For Nigerian and African policymakers, Ethiopia offers three lessons on converting FOCAC attention into measurable delivery.

### FIRST

#### Separate recognition from new delivery

Chinese outcome lists count pre-existing platforms. Ministries should register which items originated after September 2024 and track those against outputs, so that FOCAC reporting reflects additional value rather than relabelled continuity.

### SECOND

#### Treat tariff access as a pipeline problem

Zero duty did little for Ethiopia until sanitary protocols, buyers and logistics followed. The August 2026 export session and the soybean meal protocol show where effort pays: product-by-product market access and buyer matchmaking, measured by shipments.

### THIRD

#### Demand project lists for grants

Signed grants without published allocations cannot be monitored. Finance ministries should publish the project list and implementing agency at signature, as a condition for counting the grant as delivery.

## ANNEX A

## The wider China-Ethiopia register

The register below lists further China-Ethiopia activities screened between September 2024 and September 2026. Stage and attribution are assessed on the evidence found; inclusion does not imply FOCAC delivery.

### WHAT THE WIDER REGISTER SHOWS

Most wider activity is commercial or bilateral. The largest figures (Ming Yang's US\$14.1 billion licence, the Bishoftu airport financing) are investment licences or commitments, not disbursed finance, and carry no FOCAC documentary link.

The plausibly attributable items cluster in trade facilitation and agriculture: the soybean meal protocol, the August 2026 export session and the CAASTIA sub-projects. Each needs shipment, output or budget data before it can move beyond agreement.

| Record                                                                                            | Date     | Stage           | Attribution | Grade |
|---------------------------------------------------------------------------------------------------|----------|-----------------|-------------|-------|
| Wang Yi visit to Addis Ababa; joint press release committing to implement Beijing Summit outcomes | Jan 2026 | Announcement    | A1          | B     |
| 'Big Market for All: Export to China' Ethiopia session, 33 deals over US\$330m                    | Aug 2026 | Agreement       | A2          | B     |
| GACC approval of Ethiopian soybean meal imports                                                   | Jul 2025 | Agreement       | A2          | C     |
| GACC coffee access extended to 53 African states (Ethiopia already eligible)                      | Jul 2026 | Operational use | A4          | B     |
| Ethiopia-China MoU on digital and emerging technologies (MIIT)                                    | Sep 2025 | Agreement       | A3          | C     |
| CAASTIA General Assembly, Addis Ababa; four Ethiopian agricultural sub-projects                   | Oct 2025 | Announcement    | A2          | C     |
| Inaugural China-Africa Entrepreneurs Summit, AU headquarters                                      | Apr 2026 | Announcement    | A2          | B     |
| Chinese investment agreements, minerals and solar manufacturing, US\$1.7bn                        | May 2025 | Agreement       | A3          | C     |
| Ming Yang renewable energy investment licence, US\$14.1bn                                         | May 2026 | Agreement       | A3          | C     |
| Chinese bank US\$500m commitment and Chinese contractors shortlisted, Bishoftu airport            | Nov 2025 | Financing       | A3          | C     |
| GAC new energy vehicle brand launched in Ethiopia                                                 | May 2025 | Operational use | A3          | C     |
| Third Earth observation satellite with Chinese collaboration (planned 2026)                       | Mar 2025 | Announcement    | A5          | C     |
| Addis Ababa-Djibouti railway in continued operation                                               | Sep 2024 | Operational use | A4          | B     |

ANNEX B | METHOD

How to read this brief

This brief separates delivery status from FOCAC attribution. A1 means the available evidence directly links an activity to the 2024 Beijing Summit outcomes. A2 means the activity is plausibly connected but the direct documentary link is incomplete. A3 captures post-summit bilateral activity without demonstrated FOCAC attribution. A4 covers cooperation that began before September 2024 and continued or reached milestones afterwards. These attribution classes do not replace implementation status: an activity may be directly attributable to FOCAC but still only be at agreement, financing or implementation stage.

|                             |                              |                             |                             |                              |
|-----------------------------|------------------------------|-----------------------------|-----------------------------|------------------------------|
| A1<br>Direct FOCAC delivery | A2<br>Plausibly attributable | A3<br>Post-summit bilateral | A4<br>Pre-existing activity | A5<br>Disputed or unverified |
|-----------------------------|------------------------------|-----------------------------|-----------------------------|------------------------------|

Weaker attribution →

FOCAC Intelligence tests every record against three questions. The method is deliberately conservative: it separates commitment, financing, implementation, utilisation and results, and records gaps rather than inferring progress.

| # | Question                    | How it is tested                                                                                                                                                                                   |
|---|-----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | Is it a FOCAC commitment?   | Records are assessed against the Beijing Action Plan 2025-2027 and the September 2024 Summit commitments, not counted as FOCAC delivery simply because they occurred after the Summit.             |
| 2 | How far has it progressed?  | Each record is placed on the eight-stage delivery ladder below. An agreement is not implementation, a financing commitment is not disbursement, and a completed asset is not a development result. |
| 3 | How strong is the evidence? | Evidence comes from official Chinese and Ethiopian sources, corroborated by credible secondary reporting, and is graded A to D. Attribution is scored A1 to A5.                                    |

|                    |                 |                 |                      |                 |                  |                       |                        |
|--------------------|-----------------|-----------------|----------------------|-----------------|------------------|-----------------------|------------------------|
| 01<br>Announcement | 02<br>Agreement | 03<br>Financing | 04<br>Implementation | 05<br>Milestone | 06<br>Completion | 07<br>Operational use | 08<br>Verified results |
|--------------------|-----------------|-----------------|----------------------|-----------------|------------------|-----------------------|------------------------|

|                                 |                           |                              |                   |
|---------------------------------|---------------------------|------------------------------|-------------------|
| A<br>Independently corroborated | B<br>Official documentary | C<br>Credible but incomplete | D<br>Insufficient |
|---------------------------------|---------------------------|------------------------------|-------------------|

The available public record remains incomplete. Important areas of China-Ethiopia cooperation may not yet appear in the verified register because project-level information, financing detail or explicit FOCAC attribution has not been made publicly available. The figures in this brief should therefore be read as a verified minimum, rather than as a complete inventory.

ANNEX C

Glossary

| Term  | Meaning                                            |
|-------|----------------------------------------------------|
| FOCAC | Forum on China-Africa Cooperation, founded in 2000 |

| Term                | Meaning                                                                                                              |
|---------------------|----------------------------------------------------------------------------------------------------------------------|
| Beijing Action Plan | FOCAC plan for 2025-2027 adopted at the September 2024 Beijing Summit                                                |
| CAEPSD              | China-Africa Economic Partnership for Shared Development: framework agreements plus early harvest arrangements       |
| Early harvest       | Interim arrangement that binds zero tariffs before a fuller agreement                                                |
| MOFCOM              | Ministry of Commerce of the People's Republic of China                                                               |
| GACC                | General Administration of Customs of China                                                                           |
| A1 to A5            | Attribution classes, from direct FOCAC delivery (A1) to disputed or unverified (A5)                                  |
| Grades A to D       | Evidence quality, from independently corroborated (A) to insufficient (D)                                            |
| LDC                 | Least developed country, as classified by the United Nations                                                         |
| Common Framework    | G20 framework for debt treatment of low-income countries                                                             |
| OCC                 | Official Creditor Committee, the group of official creditors negotiating a debt treatment under the Common Framework |
| CIDCA               | China International Development Cooperation Agency                                                                   |
| UNIDO               | United Nations Industrial Development Organization                                                                   |

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## Independence, version and citation

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## POLICY DELIVERY INTERNATIONAL LIMITED (PDIL)

Policy intelligence, strategy, results delivery and institutional reform.  
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## CONTACT

Ventures Park, 5 Kwaji Close, Maitama, Abuja  
[info@policydelivery.africa](mailto:info@policydelivery.africa)  
[policydelivery.africa](http://policydelivery.africa)  
+2348156527286